AGENDA FOR

CABINET

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To: All Members of Cabinet

Councillors : E O'Brien (Leader and Cabinet Member, Strategic Growth) (Chair), C Cummins (Cabinet Member, Housing Services), R Gold (Customer Service, Communications and Corporate Affairs), C Morris (Cabinet Member, Culture, Economy & Skills), A Quinn (Cabinet Member, Environment, Climate Change and Operations), L Smith (Deputy Leader and Cabinet Member, Children and Young People), T Tariq (Adult Care, Health and Public Service Reform), S Thorpe (Deputy Leader, Finance and Transformation) and S Walmsley (Cabinet Member, Communities and Inclusion)

Dear Member/Colleague

Cabinet

You are invited to attend a meeting of the Cabinet which will be held as follows:-

Date:	Thursday, 15 January 2026
Place:	Council Chamber - Town Hall
Time:	6.00 pm
Briefing Facilities:	If Opposition Members and Co-opted Members require briefing on any particular item on the Agenda, the appropriate Director/Senior Officer originating the related report should be contacted.
Notes:	

AGENDA

1 APOLOGIES FOR ABSENCE

2 DECLARATIONS OF INTEREST

Members of Cabinet are asked to consider whether they have an interest in any of the matters of the Agenda and, if so, to formally declare that interest.

3 PUBLIC QUESTION TIME

Questions are invited from members of the public about the work of the Cabinet.

Notice of any question must be given to Democratic Services by midday on Tuesday, 13th January 2026. Approximately 30 minutes will be set aside for Public Question Time, if required.

4 MEMBER QUESTION TIME

Questions are invited from Elected Members about items on the Cabinet agenda. 15 minutes will be set aside for Member Question Time, if required.

Notice of any Member question must be given to the Monitoring Officer by midday Monday 12th January 2026.

5 MINUTES *(Pages 5 - 16)*

Minutes from the meeting held on 3 December 2025 are attached.

6 HOT FOOD TAKEAWAY SUPPLEMENTARY PLANNING DOCUMENT- CONSULTATION DRAFT *(Pages 17 - 52)*

Report of the Leader and Cabinet Member for Strategic Growth attached.

7 DISPOSAL OF LAND AT CHAMBERHALL BUSINESS PARK *(Pages 53 - 298)*

Report of the Leader and Cabinet Member for Strategic Growth attached.

8 COUNCIL TAX SUPPORT SCHEME 2026 *(Pages 299 - 352)*

Report of the Deputy Leader and Cabinet Member for Finance and Transformation is attached.

9 2025-26 Q2 FINANCE POSITION *(Pages 353 - 374)*

Report of the Deputy Leader and Cabinet Member for Finance and Transformation is attached.

10 PROCUREMENT FUTURE OPERATING MODEL BUSINESS CASE *(Pages*

375 - 428)

Report of the Deputy Leader and Cabinet Member for Finance and Transformation is attached.

11 PROCUREMENT FOR HIGHWAYS FRAMEWORK UNDER THE PROCUREMENT ACT 2023 *(Pages 429 - 432)*

Report of the Cabinet Member for Environment, Climate Change and Operations is attached.

12 HIGHWAY ASSET MANAGEMENT PLAN *(Pages 433 - 448)*

Report of the Cabinet Member for Environment, Climate Change and Operations is attached.

13 EXTRA CARE HOUSING STRATEGY 2026 TO 2036 *(Pages 449 - 500)*

Report of the Cabinet Member for Adult Care, Health and Public Service Reform is attached.

14 SIX TOWN HOUSING LTD AND BURY HOUSING SERVICES SLA *(Pages 501 - 506)*

Report of the Cabinet Member for Housing Services is attached.

15 YOUTH JUSTICE BUSINESS PLAN 2025 - 2026 *(Pages 507 - 546)*

Report of the Deputy Leader and Cabinet Member for Children and Young People is attached.

16 MINUTES OF ASSOCIATION OF GREATER MANCHESTER AUTHORITIES / GREATER MANCHESTER COMBINED AUTHORITY *(Pages 547 - 568)*

To consider the minutes of meetings of the AGMA Executive Board and Greater Manchester Combined Authority held on 22 August and 28 November.

17 URGENT BUSINESS

Any other business which by reason of special circumstances the Chair agrees may be considered as a matter of urgency.

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Agenda Item 5

Minutes of: **Cabinet**

Date of Meeting: 3 December 2025

Present: Councillor E O'Brien (in the Chair)
Councillors R Gold, C Morris, A Quinn, L Smith, T Tariq, S Thorpe and S Walmsley

Also in attendance: Councillors R Bernstein, M Smith and J Rydeheard

Public Attendance: Three members of the public were present at the meeting.

Apologies for Absence: Councillor C Cummins and Councillor S Arif

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CA.79 Apologies for Absence

Apologies were received from Councillor Cummins and Councillor Arif.

CA.80 Declarations of Interest

There were no declarations of interest.

CA.81 Public Question Time

The following question was submitted in advance of the meeting by a member of the public, Alexander Abbey:

Why is the wording for the HMO SPD so weak on the consultation point 7.1; "will not normally be granted."? Why can the word "normally" not be removed? What exceptions are expected here?

Responding, Councillor Eamonn O'Brien reported that assuming that the SPD is formally adopted, all planning applications received for HMO's will need to be considered against the SPD and all other material planning considerations, as required by Planning law. The caveat in the SPD reflects this legislation, as there can be unforeseen circumstances that may warrant an exceptional approach to the determination of a planning application. It is not possible to list all exceptions as each application will be considered on their merits, but an example may be where all standards are met in full, but 1 bedroom fails to meet space standards by 1 cm. In such a situation, on balance, it may be that this could be considered to be within an acceptable limit and would not warrant an otherwise compliant application to be refused.

A further supplementary question was submitted:

Assuming the new HMO SPD passes tonight with previous support, how long before the planning committee votes on implementation of article 4 direction to include 6 bed and smaller HMOs, which don't currently require planning at all? Without this article 4 direction, this work is almost pointless as developers will just turn to these smaller developments, especially on streets of 3 beds houses, and all issues will still remain. Will that Article 4 be voted on regardless of how the consultation comes back?

Councillor O'Brien reported that the intention is to present a report to the next Planning Control Committee, which was scheduled for 16 December. This would not be affected by any ongoing consultations. This was also a public meeting and Mr Abbey was welcome to attend and observe.

The following question was asked by a member of the public, Rebecca Partridge:

At the last Cabinet meeting we came to, you described a one-to-one deal as something small, like a strip of garden for a homeowner, where open marketing isn't required. But FOI disclosures now show around 60 such one-to-one disposals since 2015 including multi million pound transfers to developers. Given that evidence, can you confirm that the Council's internal categorisation of a one-to-one disposal is not openly marketed? And, if not, can you explain what distinguishes these 60 unmarketed developer transactions from the definition you gave publicly?

Councillor O'Brien replied that this was a very complex question, if details on all 60 were being requested. He confirmed that one-to-one sales could range from bigger sales to very small ones, with the vast majority being smaller strips of land. The test for all these sites was whether it followed the legal framework, whether it provided best value to residents and the borough, and whether it met strategic objectives. With bigger sites, there were other thresholds and criteria on top of this. Without knowing all 60 sales referred to, the Leader declined to comment on which were openly marketed, and advised that any definition of a one-to-one sale wouldn't necessarily refer to marketing.

Rob Summerfield, Director of Regeneration and Project Delivery, added that each site was different and the intention of the disposal was different. The Council has the capacity to undertake direct disposals, but this was governed by a strict set of rules. There is no formal definition for a direct disposal as each site will be judged on its own merits; this was a very complicated process and could not be simplified in the way being requested.

The Leader clarified that the Council has had the Accelerated Land Disposal Programme (ALDP) which has been advertised as a whole, as well as being approached by residents about certain strips of land. He advised Mr Jacobs and Ms Partridge that the Council could review the list of 60 and provided details as to which were marketed.

The following question was asked by a member of the public, Daniel Jacobs:

Are you going to be releasing the Part B reports to the deals sold to developers as I have requested from the list of one-to-one deals? These requests have been rejected for, what I believe to be over-generous commercial sensitivity, but they were deals done years ago. You could reassure the public somewhat that you were acting in their best interests.

Councillor O'Brien replied that there are a variety of ways that members of the public and interested parties can request information, and it's up to the judgement of the Council's legal team to determine where information remained commercially sensitive. Crucially, elected Members do get the opportunity to scrutinise Part B reports,

including Opposition Members, so decisions are not made without objective scrutiny and are done with a reasonable level of transparency. That is how the Council can assure the public that these are decisions still made by public representatives and in full view of non-executive and opposition Members.

If judgements have been made about what can be released or not, this is not to be second guessed by Members today. The Leader confirmed he was satisfied that when decisions are made in Part B, they are done for the right reasons and that information is handled correctly. We can go away and look at what you've asked, but there has been lots in the public domain and we have endeavoured to give the information when we can and explained why we can't when this is the case. The Leader confirmed he was satisfied that the decision Mr Jacobs was interested in has been made for the right reasons in the right way. He agreed with the point being made about the importance of transparency, and advised that ultimately this was for the public, as well as independent external organisations, to decide if the Council was not handling information correctly.

CA.82 Member Question Time

The following question was submitted in advance of the meeting by Councillor Jack Rydeheard:

I was pleased to work cross-party to mandate the provision of item 7, however I am concerned by the proposed contents of the supplementary planning document (SPD). Please can the Leader clarify how the parameters set out at point 7 of the report were decided upon, and may he clarify how these parameters would prevent mini-clusters of HMOs every 100m on every street in the Borough?

Responding, Councillor Eamonn O'Brien reported that the consultation draft HMO SPD sets three locational measures for new HMOs coming through Planning. The concentration threshold sets a maximum limit of 10% or no more than four properties (whichever is the lower) within a 100m radius – so this includes the streets 100m behind or in front of the application property. This is a more stringent than examples seen in other boroughs where there is no maximum limit within a 50m or 100m threshold. The sandwiching restriction (restrictions on properties being enclosed by HMOs) and the restriction on three adjacent HMOs place further limits which seek to prevent clustering.

A further supplementary question was submitted:

Part of the motion that we passed was to do with consultation with all parties in the Chamber with regards to density caps; please can you detail when that took place and what representations were taken?

The Leader undertook to produce a report on this information outside of this meeting and to circulate it to all Members.

CA.83 Minutes

It was agreed:

That the minutes of the meeting held on 5 November 2025 be approved as a correct record.

CA.84 Northern Gateway, Western Access scheme: Approval of Main Construction Contract to undertake Pre-construction and Construction Stage activities

The Leader and Cabinet Member for Strategic Growth presented a report regarding the acceptance of a final contract sum for the next phase of the Northern Gateway, Western Access scheme's Pre-construction stage (Stage 2b), and the associated NEC4 ECC Option C X22 Main Contract. These activities include the finalisation of the scheme Outline Business Case, preparing a likely Planning Application, Planning Designs, and undertaking a comprehensive programme of on-site surveys and ground investigations.

Decision:
Cabinet:

1. Delegated final acceptance of a final contract sum, up to a provisional maximum of £2,830,403 covering the finalisation of the Outline Business Case stage work packages (Stage 2b), to the Director of Law and Democratic Services in consultation with the Executive Director of Place and Director of Finance and the Council Leader and Cabinet Member for Strategic Growth; and
2. Delegated finalisation of the Main Pre-Construction and Construction Contract (NEC4 ECC Option C X22 contract) including appropriate break clauses, to the Director of Law and Democratic Services in consultation with the Executive Director of Place and the Council Leader and Cabinet Member for Strategic Growth.

Reasons for the decision:
The Western Access scheme (Pilsworth Road Corridor Improvements) is a cross-boundary scheme with Rochdale Council. It will provide the necessary off-site, highway and transportation infrastructure required to access the early development phases of the Northern Gateway Investment Zone (IZ) site (JPA 1.1 allocation). The construction of the Western Access scheme will therefore support the creation of high quality, employment floor space, including space within the advanced manufacturing and foundational sectors.

Alternative options considered and rejected:

- That the recommendations are not approved, and the Year 1, Year 2 and Year 3 Investment Zone revenue grant funding totalling £1.5M is not fully utilised, with the funding being reallocated elsewhere in Greater Manchester. This presents a high risk to the delivery of the Places for Everyone joint development plan and specifically, the delivery of the Western Access scheme and the Northern Gateway Investment Zone (JPA1.1 allocation).
- Delaying the delivery of the Western Access scheme would erode confidence in the Council's ability to deliver a key strategic priority for both Bury Council and its strategic partners, including Rochdale Borough Council, Greater Manchester Combined Authority, Transport for Greater Manchester and National Highways. Delaying the delivery of the Western Access scheme would undermine supporting the delivery of a number of major, corporate strategies and Team Bury initiatives including the Council's 'Let's Do It' Vision and Strategy, Northern

Gateway Strategic Development Vision, Atom Valley MDZ Vision and emergent Mayoral Development Corporation, Northern Gateway Development Framework (supplementary planning document), Bury's Economic Strategy, the emergent Greater Manchester Transport Strategy, amongst others.

CA.85 Houses in Multiple Occupation Supplementary Planning Document - consultation draft

The Cabinet Member for Leader and Cabinet Member for Strategic Growth presented a report seeking approval to carry out consultation on the Draft Houses in Multiple Occupation Supplementary Planning Document (SPD). This would provide guidelines and key considerations for the determination of planning applications for Houses in Multiple Occupation. The aim of the SPD is to avoid an over-concentration of HMOs and ensure that they provide suitable living standards for future occupants and reduce potential for detrimental impacts on local communities. It was noted that the consultation period had been increased from 4 to 6 weeks, owing to the time of year.

In response to Members' questions it was noted that there were deep concerns about the growing concentration of HMOs, which could change local housing markets and potentially limit opportunities for larger families. The Leader advised he was confident that there were sufficient grounds to propose the Article 4 Directive but it was ultimately up to the Planning Committee to make a decision on this, with advice from planning officers and specialists. If agreed, and the consultation approved, there would be some flexibility in the implementation period, but this would likely be a matter of weeks rather than months considering the long, public debate and consultation as well as the pressing need. It was noted that a decision on implementation would likely come early in the new year, with the views from other Party Leaders being sought. In response to other Member comments, it was agreed that a Member Development session would be arranged for all councillors, in order to refresh their knowledge and support their role in representing local residents at Planning meetings.

Decision:
Cabinet:

1. Approved the draft Houses in Multiple Occupation SPD as the basis for a six-week public consultation commencing December 2025; and
2. Delegated approval to the Executive Director of Place to undertake the public consultation and make minor non-material modifications to the draft Houses in Multiple Occupation Supplementary Planning Document before consultation commences.

Reasons for the decision:
To ensure that all stakeholders are given the opportunity to have their say on the draft Houses in Multiple Occupation Supplementary Planning Document.

Alternative options considered and rejected:
To not approve the SPD for consultation. This would prevent stakeholders from commenting on the SPD and would prevent the Council from being able to proceed to adopt the SPD because it is a statutory requirement that such documents must be consulted on before adoption.

CA.86 Prestwich Village Regeneration Project: Phase 1B and 2 Development Strategy

The Leader and Cabinet Member for Strategic Growth presented a report regarding the next stage of the Prestwich Village Regeneration Project, which included new housing, new retail units, a market hall, new leisure facilities and a new home for the library and attractive public realm. The Leader advised that the scheme was progressing steadily and this approval would keep the momentum up after the conclusion of the first phase.

In response to Members' questions it was noted that the Prestwich scheme was quite advanced in terms of delivery when compared with other schemes. Prestwich and other town centres were becoming tired and suffering from vacancies, in contrast to their vibrant communities, and therefore the schemes benefitted from being very clearly defined. Bury Town Centre regeneration, however, was coming from an existing position of strength, which was a different dynamic and arguably more complex in terms of sequencing delivery.

Decision:
Cabinet:

1. Approved the commitment of circa £3,475,000 to deliver design, planning demolition and vacant possession activities required to achieve agreed milestones required to secure GMCA funding. This funding requirement is broken down as follows:
   - Underwriting of £2,250,000 in design fees (funded initially by Muse Places on behalf of the Joint Venture)
   - £1,000,000 in demolition costs
   - £225,000 to achieve vacant possession
2. Noted the risks and proposed mitigations associated with the implementation of this development strategy.

Reasons for the decision:
Commitment of funds and delivery of the milestones stated below are required in order for the Council to secure external grant/Patient Equity funding via the GMCA in their March 2026 funding round.

Alternative options considered and rejected:
Pause the Prestwich Village Regeneration project following completion of Phase 1A of the development until external gap funding is secured via another route/funder. This option has been rejected as there is no clear alternative route to external funding for the project, other than that which is on offer from the GMCA. Following devolution, the majority of external grant funds are now managed via the GMCA. As such, their regeneration support funding is the most effective route to project delivery.

CA.87 Corporate Plan Quarter Two 2025-26 Performance & Delivery

The Deputy Leader and Cabinet Member for Finance and Transformation presented the summary report for the Corporate Plan. This described the progress made in the second quarter of the financial year (July – September 2025) including some significant achievements such as the lifting of the ILACS intervention, ongoing SEND transformation, and key regeneration projects progressing on track or ahead of schedule. Councillor Thorpe also highlighted some Amber rated indicators, which

would be revied and mitigated for Quarter 3, but advised that these largely did not reflect the Council's ability to deliver but were delayed by external influences.

Decision:
Cabinet noted the Quarter Two position on progress against the Corporate Plan 2025-26

Reasons for the decision:
To enable transparency and robust monitoring of performance and delivery of the Corporate Plan.

Alternative options considered and rejected:
Not applicable.

CA.88 Draft 2026/27 Revenue Budget

The Deputy Leader and Cabinet Member for Finance and Transformation presented a report which presented the updated budget position for 2026/27, informed Members of the updated budget gap of £16.000m for 2026/27, presented a draft set of budget proposals and the remaining budget gap, informed members of the forecast reserves position over the three years 2026/27 to 2028/29, and set out the 2026/27 budget setting process ahead of Budget Council on 25 February 2026. Members thanked officers in the Finance Team and across departments for their work in developing these proposals, as well as Cabinet Members for leading on their portfolio areas. It was noted that a one-year MTFS was proposed until more detail was available regarding the Fairer Funding review, and that consultation would begin on 4th December.

In response to Members' questions it was noted that the zero base budgeting exercise had been valuable in identifying efficiencies and therefore securing savings that would not impact residents. Even when a service was changing, e.g. Adult Care, proposals included changing service provision in order to retain or improve the standard of care. Some fees and charges would increase, but these would be in-line with financial assessments and were increasing from a historically low base. It was noted that the delivery plan would provide greater detail on any expected impact, and where noticeable impact on a group or a service was anticipated, a specific consultation would be held around that issue.

With regards to collaboration with other boroughs, this would be done where appropriate. School transport was an area with possibilities for an efficient and equitable shared service but was complex to develop, and it was important for other local issues to secure Bury-specific solutions. It was noted that a benchmarking exercise would be undertaken to see how Bury compared with other boroughs.

Decision:
Cabinet:

1. Approved the set of draft revenue budget proposals totalling £14.577m for inclusion in the Cabinet proposals for the setting of the 2026/27 revenue budget to be considered by Council on 25 February 2026;
2. Approved consultation on draft budget proposals between 4th December to 19th January 2026;

3. Noted that the outcomes of the budget consultation will be reported back to Members and used to inform the budget setting proposals and referred to Overview & Scrutiny Committee for their consideration;
4. Noted the remaining budget gap of £7.547m for 2026/27 with further budget proposals to be presented to Cabinet in January 2026; and
5. Noted the forecast reserves balance for 2026/27.

Reasons for the decision:
The Council has a legal requirement annually to set a balanced budget and Council Tax and where necessary undertake consultation with the public, businesses, stakeholders and internally with staff and through Overview & Scrutiny Committee.

Alternative options considered and rejected:

- The current assumption within the MTFS is for an on-going 4.99% annual Council Tax increase (2.99% general precept and 2% adult social care precept). An alternative option could be made to increase its 'relevant basic amount of council tax' above the levels that will be set out in the 2026/27 Local Government Finance Settlement published later in the year, but this would require holding a local referendum and a majority vote. A 1% increase or decrease in Council Tax is the equivalent to c£1.27m.

CA.89 Adult Social Care Performance Quarter Two Report 2025/26

The Cabinet Member for Adult Care, Health, and Public Service Reform presented the Adult Social Care Department Quarter 2 Report for 2025-26 which outlined delivery of the Adult Social Care Strategic Plan, preparation for the new CQC Assessment regime for local authorities, and provided an illustration and report on the department's performance framework. In response to Members' questions it was noted that some effects of summer holidays but also the time taken preparing for CQC this quarter had resulted in drops in activity which had led to increases in waiting lists and outstanding reviews, but recovery in Quarter 3 was expected.

Decision:
Cabinet noted the report.

Reasons for the decision:
N/A

Alternative options considered and rejected:
N/A

CA.90 Neighbourhood Support Housing Services - Young People's Accommodation & Support Tender - Part A

The Cabinet Member for Adult Care, Health and Public Service Reform presented a report regarding a tendering exercise for Young People's Accommodation and Support Services. This commission would be the most significant transformation of accommodation for young people in the last 20 years in the borough, having a positive impact on young people and young families experiencing or at risk of homelessness in Bury, in particular Bury Care Leavers.

Decision:
Cabinet:

1. Delegated finalisation for the provision of Young People's and Young Families Accommodation and Support Services, to the Director of Law and Democratic Services with approval from the Director of Adult Social Services and Community Commissioning and the Executive Director of Children's Services; and
2. Noted that joint funding arrangements between Adult Social Care and Children's Services were previously agreed at Cabinet on 9th July 2025 and are detailed in Part B.

Reasons for the decision:

- The current contract ends on 1st February 2026; this contract cannot be further extended. New contracts will therefore need to commence on 2nd February 2026.
- Each Lot requires the availability of a significant number of units of accommodation. To deliver this effectively and on time, the successful provider/s will require a reasonable mobilisation period. Therefore, it is recommended that Cabinet delegate finalisation and sealing of contract awards, for the provision of Young People's and Young Families Accommodation and Support Services, to the Director of Law and Democratic Services with approval from the Director of Adult Social Services and Community Commissioning and the Executive Director of Children's Services.
- This decision will enable the division to inform successful providers following the conclusion of the tender evaluation process and standstill period, which is expected to be completed the week commencing 15th December 2025.

Alternative options considered and rejected:
The current contract is due to end on 1st February 2026; previous extensions have been awarded on this contract and procurement rules do not allow any further extensions to the current contractual arrangements.

CA.91 Housing Major Works Programme 2025/26 - Part A

The Cabinet Member for Housing Services presented a report which sought formal approval of two contract awards which form part of the Housing Major Works Programme in respect of internal works consisting of new kitchens and bathrooms, heating and electrical works. It was noted these works would target individual properties rather than estates.

Decision:
Cabinet:

1. Approved the contract award to Emanuel Whittaker Limited in respect of internal works consisting of new kitchens and bathrooms, heating and electrical works to 93 properties in the South of the Borough for the sum of £855,589.05 including £50K contingency.
2. Approved the contract award to Jackson Jackson and Sons Limited in respect of internal works consisting of new kitchens and bathrooms, heating and electrical works to 93 properties in the North of the Borough for the sum of £899,041.44 including £50K contingency

3. Noted that there is the option to extend for a further period of 1 year up to an estimated total contract value of between £4 and 5 million subject to the availability of funding.

Reasons for the decision:
A key regulatory requirement for Housing is to ensure all Bury Council homes are maintained, as a minimum, to the Decent Home Standard. A key expectation of the Regulator for Social Housing is that all our homes are of good quality, well maintained and safe homes for tenants and comply with the Decent Homes Standard.

Alternative options considered and rejected:

- Do nothing: Maintaining homes to at least the Decent Homes Standard is a regulatory requirement, and the Council would quickly become non-compliant with the Home Standard part of the Regulatory Requirements if these works were not brought forward
- Deliver Inhouse: These are major contracts, and the in-house contractor does not have the capacity to carry out these works.
- Open Tender: This option was considered and is a possibility. However, this would involve a significantly extended procurement process in both time and cost.

CA.92 AB Electrical EICR and LD2 Services Contract Award Decision

The Cabinet Member for Housing Services presented a report which sought formal approval of a contract award, through the Procure Plus framework, for the completion of Electrical Installation Condition Reports (EICR) and the installation of fire detectors to a Category LD2 system standard required in all domestic property circulation areas that form part of the escape routes and in all specified rooms or areas that present a high fire risk to occupants.

Decision:
Cabinet approved the award of a contract to the contractor placed number 1 on the Procure Plus Framework, AB Electrical and Building Ltd for the initial period of 3 years with the option to extend for a further two periods of 12 months.

Reasons for the decision:
The contract delivers Landlord Statutory Compliance Services on behalf of the Council.

Alternative options considered and rejected:

- Do nothing: There is no current contract in place for these services which are a legal requirement under The Electrical Safety Standards in the Private and Social Rented Sectors (England) Regulations 2020/2025 so the Council would quickly become non-compliant
- Deliver in house: These are major contract's carried out in our housing stock of over 7500 properties, sheltered and extra care schemes and communal blocks and we lack the capacity in house. The new structure of the Building Safety Team is designed to be contractor led and managed by the Building Safety Team.

- Open tender: This option was considered and is possible. However, this would involve a significantly extended procurement process in both time and cost.

CA.93 Local Authority Housing Fund, Round 3, (LAFH)

The Cabinet Member for Housing Services presented a report regarding an expression of interest submitted by the Council for 40% grant funding under LAFH Round 3 to acquire seven properties to provide temporary accommodation for homeless families. Bury was successful and has been awarded £447,200 from MHCLG, and this report sought approval to match fund the grant.

Decision:
Cabinet approved the use of £690,000 of match funding from the General Fund Capital Programme 25/26 to enable the purchase of seven homes to help reduce reliance on unsuitable and costly temporary accommodation.

Reasons for the decision:
2.1 Approval is needed for 60% General Fund Capital Programme match funding to support the purchase of seven properties. Rents will be set at affordable rent levels. This approach supports long-term sustainability reflecting an invest-to-save model, reducing reliance on expensive Bed and Breakfast placements. Estimated savings are approximately £1,164m million over three years. The proposal aligns with LAHF grant conditions enabling the Council to meet its statutory housing duties while easing financial pressure.

Alternative options considered and rejected:
Do nothing: These properties will provide long-term, financially sustainable temporary accommodation for the borough, with the council contributing only 60% of the acquisition cost. If this option is not pursued, the council may need to continue relying on expensive bed and breakfast placements, which would not support a cost-effective, invest-to-save approach.

CA.94 Exclusion of Press and Public

Decision:
That the press and public be excluded from the meeting under Section 100 (A)(4), Schedule 12(A) of the Local Government Act 1972, for the reason that the following business involves the disclosure of exempt information as detailed against the item.

CA.95 Neighbourhood Support Housing Services - Young People's Accommodation & Support Tender - Part B

The Cabinet Member for Adult Care, Health and Public Service Reform presented the Part B report containing the full financial information.

Decision:
Cabinet:

1. Delegated finalisation for the provision of Young People's and Young Families Accommodation and Support Services, to the Director of Law and Democratic Services with approval from the Director of Adult Social Services

and Community Commissioning and the Executive Director of Children's Services; and

2. Noted that joint funding arrangements between Adult Social Care and Children's Services were previously agreed at Cabinet on 9th July 2025.

Reasons for the decision:
As set out for the Part A report.

Alternative options considered and rejected:
As set out for the Part A report.

CA.96 Housing Major Works Programme 2025/26 - Part B

The Cabinet Member for Housing Services presented the Part B report containing the full financial information.

Decision:
Cabinet:

1. Approved the contract award to Emanuel Whittaker Limited in respect of internal works consisting of new kitchens and bathrooms, heating and electrical works to 93 properties in the South of the Borough for the sum of £855,589.05 including £50K contingency.
2. Approved the contract award to Jackson Jackson and Sons Limited in respect of internal works consisting of new kitchens and bathrooms, heating and electrical works to 93 properties in the North of the Borough for the sum of £899,041.44 including £50K contingency
3. Noted that there is the option to extend for a further period of 1 year up to an estimated total contract value of between £4 and 5 million subject to the availability of funding.

Reasons for the decision:
As set out for the Part A report.

Alternative options considered and rejected:
As set out for the Part A report.

COUNCILLOR E O'Brien
Chair

(Note: The meeting started at 6.05 pm and ended at 7.30 pm)

Agenda Item 6

Classification:	Decision Type:
Open	Key

Report to:	Cabinet	**Date:** 15th January 2026
Subject:	Hot Food Takeaway Supplementary Planning Document- Consultation Draft	
Report of	Leader and Cabinet Member for Strategic Growth	

Summary

1. Good health is one of the key determinants of quality of life. As well as being of great importance in its own right, it also has a significant impact on the ability of people to enjoy the immense range of opportunities across Greater Manchester and allows them to make a positive economic contribution.

2. Today, the planning system has an increasingly important role to play in helping to make towns and cities healthier places to live, work and visit. Health is now embedded as a key theme throughout national and local policy, underpinning many aspects of planning to provide a more sustainable and beneficial future, thereby securing the health and wellbeing of our population.

3. This Hot Food Takeaway Supplementary Planning Document (SPD) provides supporting information and guidance on how the Local Planning Authority will assess planning applications for hot food takeaways where planning permission is required.

Recommendation(s)

4. It is recommended that Cabinet:

   i. Approves the draft Hot Food Takeaway SPD attached at Appendix 1 as the basis for a six-week public consultation commencing January 2026.

   ii. Delegates approval to the Executive Director (Place) to undertake the public consultation and make minor modifications to the draft Hot Food Takeaway Supplementary Planning Document before consultation commences.

Reasons for recommendation(s)

5. To ensure that all stakeholders are given the opportunity to comment on the draft Hot Food Takeaway Supplementary Planning Document.

Alternative options considered and rejected

6. To not approve the SPD for consultation. This would prevent stakeholders from commenting on the SPD and would prevent the Council from being able to proceed to adopt the SPD because it is a statutory requirement that such documents must be consulted on before adoption.

Report Author and Contact Details:

Name: David Wiggins
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Department: Business, Growth and Infrastructure
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Background

7. Places for Everyone (`PfE') is a joint plan of nine Greater Manchester districts and was adopted on 21st March 2024.

8. One of the key aims of PfE is to set out where we will build the new homes we need, where our businesses will locate to sustain and create jobs for our people, what infrastructure is needed to support the development and to protect and enhance our towns, cities and landscapes. PfE covers a timeframe up to 2039. In meeting our statutory housing targets, there is a requirement to ensure that the necessary infrastructure is also provided to cater for the needs of increased households.

9. PfE Policy JP-P6: Health states that to help tackle health inequality, new development will be required as far as practicable to maximise its positive contribution to health and wellbeing, whilst avoiding any potential negative impacts of new development.

10. The draft Hot Food Takeaway SPD provides supporting information and guidance on how the Local Planning Authority will assess planning applications for hot food takeaways where planning permission is required, for example for new hot food takeaways or applications for a variation of opening times.

11. The SPD seeks to provide a framework to support a balanced and fair approach to supporting local business and economic growth whilst also taking steps to ensure our environment supports the health and wellbeing of our residents.

12. The SPD has been produced in collaboration with Public Health.

Scope and Content of the SPD

13. The concentration of hot food takeaways on our high streets, within our neighbourhoods, and close to schools has been recognised as a key planning issue for some time. Councils across the country are experiencing similar issues, often in areas suffering from high levels of deprivation.

14. Childhood overweight and obesity rates in Bury remain significantly above national averages, with NCMP data showing that more than 25% of children in some Lower Super Output Areas are affected. These figures have risen in

recent years, alongside an increase in hot food takeaway outlets and evidence demonstrates a clear association between the density of hot food takeaways and unhealthy weight outcomes, particularly in deprived communities.

15. The SP provides the context around the whole systems approach to support healthy environments and reduce obesity and the role that the SPD can play alongside other initiatives to address the obesogenic environment.

16. The Hot Food Takeaway SPD explains the requirements, relevant thresholds and measures that may need to be taken to ensure that a hot food takeaway is acceptable in planning terms. The requirements consist of:

- Using local health intelligence to inform decision making via the Hot Food Takeaway Planning Matrix.
- Proximity to Schools.
- Locations where there are high levels of obesity.
- Over-proliferation of hot food takeaways and
- Limiting the impacts of hot food takeaways in relation to environmental health, highways issues and general residential amenity.

Proximity to Schools

17. In an effort to establish appropriate healthy eating habits and reduce the rate of childhood obesity in the local population the Council considers it appropriate to restrict the establishment of new hot food takeaways around secondary schools. Planning permission will not be granted for new hot food takeaways which are located within a 400m radius of secondary schools.

18. It is not considered appropriate, at this time, to restrict hot food takeaways around primary schools as there is no comparable evidence to suggest that the location of hot food takeaways acts as an obstacle to primary school children eating healthily. It is thought that the majority of primary school children are not permitted out of the school grounds during the school day, and that they are more likely to be accompanied by an adult on their way to and from school.

Locations where there are high levels of obesity

19. In assessing planning applications for new hot food takeaways, consideration will be given to levels of excess weight of 10-11 year old pupils (primary school year six pupils). In Lower Super Output Areas[1] where obesity levels in primary school Year Six pupils are more than 25% and there are more than 5

[1] Lower layer Super Output Areas (LSOAs) comprise between 400 and 1,200 households and have a usually resident population between 1,000 and 3,000 persons (ONS, 2025).

existing hot food takeaways within that ward, planning permission will not be granted on the grounds that it would be harmful to public health.

20. Applying a more than 25% Year Six obesity threshold ensures that restrictions target areas with the greatest health need, supporting local and national public health objectives to reduce obesity, improve diet, and promote healthier environments. This approach aligns with NPPF guidance and reflects Bury's commitment to tackling health inequalities through spatial planning.

Over Proliferation

21. An over-proliferation of hot food takeaway uses situated within close proximity may result in harmful impacts on residential amenity, as well as displace other uses and reduce options for healthier food choices. This could lead to negative outcomes on the vitality and viability of a centre or parade.

22. In assessing planning applications for a new hot food takeaway consideration will also be given to whether the cumulative impact of introducing the new facility would be detrimental to public health. Regard will be had to:

- the number of existing hot food take away establishments in the immediate area and their proximity to each other.
- the type and characteristics of other uses, such as housing, shops and public houses; and
- any known unresolved amenity, traffic or safety issues arising from existing uses in the area.

23. In operating this requirement and to prevent the clustering of hot food takeaways, there should be no more than two consecutive hot food takeaways in any one length of frontage. Where there are already existing hot food takeaways in any one length of frontage, a gap of at least two non-hot food takeaway uses shall be required before a further hot food takeaway will be permitted in the same length of frontage.

Consultation and Adoption

24. The SPD is being prepared in accordance with the Planning and Compulsory Purchase Act 2004 and the Town and Country Planning (Local Planning) (England) Regulations 2012 which are reflected in our Statement of Community Involvement. The Regulations set out that a draft SPD must be:

- Screened to determine whether Strategic Environmental Assessment or Habitat Regulation Assessment is required. The outcomes of the screening opinion will be published alongside the draft SPD.

- Made available for public consultation for a 4-week minimum period.

- Be made available as an online copy and have hard copies available at the Council's main reception and all libraries across the Borough.

5.1 The SPD will be prepared in accordance with the statutory framework set out in the Planning and Compulsory Purchase Act 2004 and the regulations cited above, and relevant material available for inspection shall be posted on the Council's web site. Electronic copies will also be available at the Bury Town Hall reception; Bury, Prestwich, Radcliffe or Ramsbottom Libraries and at the Tottington Centre. Letters/emails will also be sent to all contacts on the Council's development plan database. We will also advertise the consultation via social media platforms.

25. Following consultation, the draft SPD will, if necessary, be amended (in light of the consultation process) before being brought back to Members seeking formal approval for the adoption of the document.

Conclusion

26. Members will in due course be requested to approve any proposed changes to SPD that arise out of the consultation process before agreeing to adopt it as fully up-to-date guidance.

Links with the Corporate Priorities:

27. Places for Everyone forms part of Bury's statutory development plan. It sets out statutory policies and strategic site allocations that will guide future growth and development in the Borough. A key part of the Plan is to rebalance the Greater Manchester economy by significantly boosting the economic output from the north through the delivery of new housing and employment that will benefit both Bury and its residents. The 'Let's Do It' strategy specifically refers to Places for Everyone as having a key role to play in the delivery of its objectives and priorities.

Equality Impact and Considerations:

28. A full Equality Impact Analysis has been completed. This has identified only positive impacts at pre consultation stage. The EIA will be reviewed and updated post consultation with relevant equalities considerations.

There are no equalities concerns at this stage.

Environmental Impact and Considerations:

29. The revised SPD is not expected to give rise to any significant environmental effects. The SPD provides supporting information and guidance on how the Local Planning Authority will assess applications for hot food takeaways where planning permission is required.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
Stakeholders do not engage in the consultation on the draft Hot Food Take Aways Supplementary Planning Document.	The SPD is being prepared in accordance with the Planning and Compulsory Purchase Act 2004 and the Town and Country Planning (Local Planning) (England) Regulations 2012 which are reflected in our Statement of Community Involvement. However, the consultation process will be kept under review and will be adjusted if additional stakeholder engagement is required.

Legal Implications

30. The statutory requirements for the preparation of SPDs are set out in the Planning and Compulsory Purchase Act 2004 and the Town and Country Planning (Local Planning) (England) Regulations 2012 and the report set out how these requirements have been followed.

31. Before final adoption of the SPD, Cabinet must consider the issues raised during the consultation and how those issues have been addressed. If adopted, the SPD will be a material consideration to which regard may be had in determining relevant planning applications.

32. If the SPD is finally adopted, the Council must publish an "Adoption Statement" specifying the date of adoption, any modifications made and the time limits for anyone aggrieved by the decision to apply for permission for judicial review of the decision.

33. The matter before Cabinet in this report is the adoption of the draft for consultation and the recommendations within the report are within the legal powers of the Council.

Financial Implications:

5.2 There are no financial implications arising directly from the report.

Appendices:

Appendix 1 – Hot Food Take Aways Supplementary Planning Document

Background papers:

None.

Please include a glossary of terms, abbreviations and acronyms used in this report.

Term	Meaning
SPD	Supplementary Planning Document
PfE	Places for Everyone

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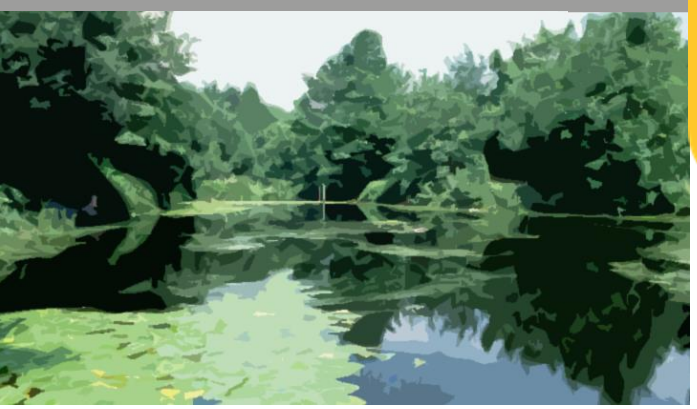
Bury Council

Consultation Draft Supplementary Planning Document 19

Hot Food Takeaways

January 2026



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1 Introduction

1.1 Good health is one of the key determinants of quality of life. As well as being of great importance in its own right, it also has a significant impact on the ability of people to enjoy the immense range of opportunities across Greater Manchester and to make a positive economic contribution. Today, the planning system has an increasingly important role to play in helping to make towns and cities healthier places to live, work and visit. Health is now embedded as a key theme throughout national and local policy, underpinning many aspects of planning to provide a more sustainable and beneficial future for the health and wellbeing of our population.

1.2 This Hot Food Takeaway Supplementary Planning Document (SPD) provides supporting information and guidance on how the Local Planning Authority will assess applications for hot food takeaways where planning permission is required.

1.3 This SPD is a material consideration in the determination of a planning application and provides further clarification on how current Council planning policies can be used to protect against a range of adverse impacts created by hot food takeaways.

1.4 This document has been drawn up in consultation with the Council's Public Health teams and other interested parties and explains the overall approach to the principle of hot food take away proposals across Bury.

1.5 The SPD has been prepared accordance with the Town and Country Planning (Local Planning) (England) Regulations 2012 and the National Planning Policy Framework 2023 and supports Policy JP-P6: Health of the adopted Places for Everyone Plan.

1.6 Once adopted, this SPD will be a material consideration in planning decisions. It is intended to expand on existing policies rather than duplicate other planning documents. It should be read in conjunction with the Council's Local Plan to gain an understanding of the Council's priorities, aims and objectives for the Borough. If development proposals do not comply, the SPD may be used as a reason for the refusal of planning permission.

2 Policy Context

National policy and guidance

2.1 The National Planning Policy Framework (NPPF) sets out the government's planning policies for England and aims to contribute to the achievement of sustainable development. The NPPF is a material consideration in the determination of planning applications. There are three overarching objectives to sustainable development – economic, social and environmental. The social objective states, "to support strong, vibrant and healthy communities, by ensuring that a sufficient number and range of homes can be provided to meet the needs of present and future generations; and by fostering well-designed, beautiful and safe places, with accessible services and open spaces that reflect current and future needs and support communities' health, social and cultural well-being"[1].

2.2 The NPPF states the purpose of the planning system in creating healthy and safe communities. The NPPF focuses on enabling and supporting "healthy lifestyles", especially where local health and wellbeing needs would be addressed - for example through access to "healthier food"[2].

2.3 The NPPF aims to ensure that planning policies protect the vitality and viability of town centre environments and encourages local authorities to create policies that make clear the uses permitted in certain locations[3]. The NPPF states that planning should, amongst other things, promote strong neighbourhood centres and active street frontages[4]. The NPPF also requires planning decisions to consider and support the delivery of local strategies to improve health, social and cultural wellbeing for all sections of the community, in addition to guarding against the unnecessary loss of valued facilities and services.

2.4 Paragraph 96[5] of the NPPF promotes social interaction, including opportunities for meetings between people who might not otherwise come into contact with each other, for example through mixed use developments, strong neighbourhood centres, and active street frontages.

2.5 Paragraph 96 also states that planning policies and decisions should also enable and support healthy lifestyles, especially where this would address identified local health and wellbeing needs, for example access to healthier food. The NPPF aims to support strong, vibrant and healthy communities by creating a high-quality built environment reflecting the community's needs. The core principles encourage planning to be a creative exercise in finding ways to

[1] National Planning Policy Framework (2024), Page 5
[2] National Planning Policy Framework (2024), Page 28
[3] National Planning Policy Framework (2024), Page 26
[4] National Planning Policy Framework (2024), Page 26
[5] National Planning Policy Framework (2024), Page 28

enhance and improve the places in which people live their lives. It emphasises that planning should take account of and support local strategies to improve health, social and cultural wellbeing for all.

2.6 Paragraph 97[6] of the NPPF states that local planning authorities should refuse applications for hot food takeaways and fast-food outlets where they are:

- Within walking distance of schools and other places where children and young people congregate, unless the location is within a designated town centre; or
- In locations where there is evidence that a concentration of such uses is having an adverse impact on local health, pollution or anti-social behaviour.

Planning Practice Guidance

2.7 The Government's Planning Practice Guidance (PPG) adds further context to the NPPF. The PPG explains how the planning system can play an important role in creating healthy communities and living environments that can prevent ill health and support the reduction of health inequalities. To achieve this, collaboration and engagement between planners, Public Health teams and other health organisations is firmly encouraged.

2.8 The PPG describes a healthy place[7] as one which supports and promotes healthy behaviours and environments and a reduction in health inequalities for people of all ages. It will provide the community with opportunities to improve their physical and mental health, and support community engagement and wellbeing.

2.9 In terms of hot food takeaways, the guidance states that local planning authorities can have a role by supporting opportunities for communities to access a wide range of healthier food production and consumption choices. Planning policies and supplementary planning documents can, where justified, seek to limit the proliferation of particular uses where evidence demonstrates this is appropriate (and where such uses require planning permission).

2.10 Planning policies and proposals may need to have regard to the following issues:

- proximity to locations where children and young people congregate such as schools, community centres and playgrounds.
- evidence indicating high levels of obesity, deprivation, health inequalities and general poor health in specific locations.
- over-concentration of certain uses within a specified area.
- odours and noise impact.

[6] National Planning Policy Framework (2024), Page 28
[7] PPG - Paragraph: 003 Reference ID:53-003-20191101.

- traffic impact; and
- refuse and litter.

NHS Fit for the Future: 10-year Plan for England

2.11 The NHS Long Term Plan[8] aims to improve health outcomes and reduce health inequalities by shifting healthcare delivery towards community-based and preventative care, integrating services, and leveraging technology.

2.12 The key contributions of the NHS Long Term Plan to a Healthy System include fast food takeaway restrictions. The NHS Long Term Plan acknowledges the impact of obesity and poor diet on health services. Planning powers can be used to restrict hot food takeaways, especially near schools. Recommendations include updating the NPPF to include public health as a planning consideration and applying the precautionary principle in areas with poor health outcomes.

Using the Planning System to Promote Healthy Weight Environments

2.13 Public Health England produced the "Using the planning system to promote healthy weight environments" document in February 2020[9]. This guidance supports local authority public health and planning teams to promote healthy weight environments through the powers of the planning system.

2.14 The single most common planning policy adopted to promote, has been the introduction of takeaway food outlet exclusion zones around locations often frequented by children and families[10]. These locations are most often schools but also parks and leisure centres. Exclusion zone buffer sizes are often 400 metres, which has been considered a reasonable 5-minute walk, or 800 metres which is a 10-minute walk. This principle includes primary schools, as those in year 6 may walk to and from school independently in preparation for the transfer to secondary school.

2.15 Additionally, it is recognised the families may use hot food takeaways on the way home from school and the presence of an adult does not necessarily mean hot food takeaway foods will not be purchased and consumed by children.

2.16 It may be appropriate to restrict new hot food takeaway premises just beyond 400m subject to local circumstances, such as:

- childhood obesity levels
- main school routes used by majority of children
- density of existing food retail uses

[8] NHS England » Fit for the Future: 10 Year Health Plan for England

[9] Public Health England Using the planning system to promote healthy weight environments (2020), pages 13, 14

[10] Using the planning system to promote healthy weight environments-page 14

The Use Classes Order

2.17 The Town and Country Planning (Use Classes) Order 1987 (as amended)[11] puts uses of land and buildings into various categories known as 'Use Classes'. In general, planning permission is needed to change from one use class to another.

2.18 New regulations which came into force from 1 September 2020, changed use classes including those relating to food premises such as hot food takeaways. Table 1 below provides an overview of the changes made, in relation to food retail premises only:

Table 1: Old vs the new Use Classes Order for Food Retail Premises

Use Class Order before 1st September 2020	Use Class Order from 1st September 2020
A3 Restaurants and Cafes	Class E Commercial, Business and Service
A4 Drinking Establishments	Sui Generis
A5 Hot Food Takeaways	Sui Generis

2.19 According to guidance published by the Office for Health Improvement and Disparities (OHID)[12] , 'Sui generis' is a term used for premises that do not fall within a defined use class, and that cannot, generally, change to any other use, including other "sui generis" uses without obtaining express planning permission. In this way, OHID state that the change of the A5 hot food takeaway use class "allows local authorities to have greater control, through using the planning application process, to prevent the proliferation of hot food takeaways".

2.20 It is acknowledged 'unhealthy food outlets' may encompass a broader range of planning uses than sui generis hot food takeaways alone and could also include restaurants and retail units. The focus of this note and the ensuing policy recommendations are, however, focussed on managing the proliferation of sui generis hot food takeaway uses only.

[11] The Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020: https://www.legislation.gov.uk/uksi/2020/757/made

[12] OHID is a successor organisation to Public Health England (PHE). For more details about the role and responsibilities of this body, see: https://www.gov.uk/government/organisations/office-for-health-improvement-and-disparities/about

Places for Everyone

2.21 Places for Everyone (PfE) is a joint plan of nine Greater Manchester districts and was adopted on 21st March 2024.

2.22 One of the key aims of PfE is to set out where we will build the new homes we need, where our businesses will locate to sustain and create jobs for our people, what infrastructure is needed to support the development and to protect and enhance our towns, cities and landscapes. to the Plan covers a timeframe up to 2039. It is clear that Greater Manchester and Bury will see considerable population and housing growth over the plan period that will, in turn, lead to increased pressures on infrastructure, such as education.

2.23 PfE recognises key issues related to health, wellbeing and food in the boroughs such as health disparities, sport and recreation, green infrastructure, active travel, design and food production.

2.24 Objective 10 of PfE promotes health and wellbeing of communities and seeks to improve access to healthy food options for all communities.

2.25 PfE **Policy JP-P6: Health** states that to help tackle health inequality new development will be required as far as practicable to:

A. Maximise its positive contribution to health and wellbeing, whilst avoiding any potential negative impacts of new development.

B. Support healthy lifestyles, including through the use of active design principles making physical activity an easy, practical and attractive choice; and

C. Be supported by a Health Impact Assessment for all developments which require to be screened for an Environmental Impact Assessment, and other proposals which, due to their location, nature or proximity to sensitive receptors, are likely to have a notable impact on health and wellbeing.

Bury's 'Let's Do It!' Strategy

2.26 Bury's Let's Do It Strategy[13] is a ten-year vision and strategy for the Borough. It seeks to build upon a shared sense of local pride and act as a call to arms for progressing the local vision of achieving 'faster economic growth than the national average, with lower than national average levels of deprivation'.

2.27 It is a single strategy for the council, police, health, other public services, the voluntary, community and faith sector and business communities and seeks to give everyone the encouragement and support to play their part, joining

[13] Let's Do It! strategy - Bury Council

together the delivery of all public services as one and delivering an ambitious plan for both social and economic infrastructure.

2.28 Bury's Local Plan will play a key role in delivering the vision and aims of the Let's Do It Strategy and, as such, it is important that there is alignment between these two key local strategies

Bury Joint Strategic Needs Assessment (JNSA)

2.29 The Bury JSNA[14] offers key insights into local health and wellbeing needs. It helps partners make informed decisions to improve public health, reduce inequalities, and plan better services.

2.30 The Joint Strategic Needs Assessment (JSNA) describes the health, social care and wellbeing needs of local communities in Bury. The core aim is to develop local evidence-based priorities for commissioning which will improve the public's health and reduce inequalities. JSNA output, in the form of evidence and the analysis of needs is used to help in determining what actions local authorities, the local Integrated Care Board (ICB) and other partners need to take to meet health and social care needs, and to address the wider determinants that impact on health and wellbeing locally.

Bury Food Strategy (2020-2025)

2.31 The Bury Food Strategy[15] and Good Food Charter aims to unite with the national and regional approaches to transforming the food system and tailor these to suit our local population, with a focus on collaboration to improve our food environment. The impact of poor diet on health is well known and understood. However, a poor diet also has wide reaching consequences beyond poor health, for example, on children's educational outcomes, on productivity, on the local economy and on the environment and biodiversity, with food waste accounting for almost one third of global emissions.

2.32 The Strategy identifies that in Bury childhood obesity is a significant challenge, and mirrors trends seen nationally. Almost 1 in 10 reception-age children are classified as obese, and this doubles to almost 1 in 5 children classified as obese by the time they reach year 6. The proportion of adults in Bury classified as either being overweight or obese is also very high, with 2 in 3 adults meeting that definition.

[14] https://theburydirectory.co.uk/jsna
[15] https://theburydirectory.co.uk/services/bury-food-strategy

2.33 In addition, the Strategy also finds a positive correlation between deprivation and the number of takeaways in Bury, with more deprived areas having more takeaways than less deprived areas.

2.34 The built environment in which we live, and work influences the choices we make around food. The density of fast-food takeaways in Bury is very high at 165.7 per 100,000 residents. Considering that there is an average of 115.9 hot takeaways in England per 100,000 population, the number of hot food takeaways in Bury is an issue. This type of food is typically more convenient and cheaper than healthier alternatives, and policies need to be considered on how to improve access to healthier food.

2.35 As a result, the Action Plan for 2020-2025 sets an aim to promote healthier food environments, through several deliverable actions, including limiting the number of takeaways in the borough.

3 Planning and Public Health

3.1 Having an unhealthy lifestyle can increase the risk of being overweight or obese. This can increase the chances of having poor health and developing long-term health implications. The risks of developing long term conditions earlier in life and living more years with poor health are increased due to being overweight or obese. In addition to the physical health impacts, obesity is associated with having a lower quality of life, experiences of stigma, social isolation and mental health issues for both children and adults.

3.2 Good planning means linking economic, social and environmental matters with the strategies of public agencies and service providers in the aim of creating attractive, safe and accessible places to live. This in turn improves the quality of life and wellbeing of individuals and communities. Developing strong, healthy and vibrant communities is vital to ensuring the well-being of the Borough's population and planning therefore, has a crucial role to play in ensuring health, and health inequalities, are addressed.

3.3 The health and well-being of communities must begin with the planning process and it is accepted that if communities and households have access to facilities and services, healthy food outlets, local employment opportunities, alternative transport options and well designed, open public space, they will be happier, healthier and more stable. Local planning policies, and the location of new developments and facilities, should enable people to have a choice of high quality and attractive places to live and allow them to reach the services they need and, for the services they need to reach them.

Bury's Health Context

Health Inequalities

3.4 Bury's population has increased by 5.6% from 188,400 in 2014 to 198,900 in 2024. This is lower than the overall increase for Greater Manchester (10.1%), the Northwest (8.4%) and England (7.8%) over the same period. Nearby areas such as Salford and Manchester have seen their populations increase by around 21.3% and 14.4%, respectively[16].

3.5 In 2021, Bury ranked 97th for total population out of 309 local authority areas in England, which is a fall of one place in a decade. Bury was the 10th most densely populated of the North West's 39 Local Authority Areas in 202117. The

[16] Nomis Population Estimates, 2024
[17] Office for National Statistics, 2021

Borough's population is projected to increase to 197,829 by 2030 and to 203,442 by 2040, an increase of 2.8%18.

3.6 The Index of Multiple Deprivation for 2025 ranks Bury as the 90th most deprived out of 296 local authorities (where 1st is the most deprived). In 2019 Bury ranked 95th most deprived out of 317, in 2015 Bury ranked 122nd most deprived out of 326 and in 2010 Bury ranked 114th most deprived out of 326 local authorities.

3.7 Bury has 13 Lower Super output Areas (LSOAs) in the 10% most deprived in the country, mostly found in East, Radcliffe, Besses and Moorside areas. Of all the 120 LSOAs in Bury, lower levels of deprivation are more consistently found in Tottington and Bury West wards. Overall, Bury has remained the 8th most deprived of the 10 Greater Manchester districts, where 1st is the most deprived[19].

3.8 The Income Deprivation Affecting Children Index (IDACI) measures the proportion of all children aged 0 to 15 living in income deprived families. Bury has seen worsening relative deprivation moving 22 places from rank 119 in 2019 to rank 97 in 2025. Among the 10 Greater Manchester Local Authorities, Bury has seen the largest rise in rankings for Income Deprivation Affecting Children Index (IDACI). Of the 10 most deprived LSOAs for this measure, four are in Bury East.

3.9 In the 2021 Census, 46.9% of the population of Bury identified themselves as being in very good health and 5.8% in bad health or very bad health. This is below the national average for very good health, and above the national average for bad or very bad health. Regionally, it is above the average for very good health and below the average for bad or very bad health.

3.10 According to the 2021 Census, approximately 8.5% of people in Bury are disabled under the Equality Act where their day-to-day activities are limited. This number decreased from the 2011 Census where it was 10.1% and is below the regional average (9.1%) but above the national average (7.5%)

3.11 There is a need to improve the life expectancy of Bury's residents which is currently below the national average, and there is inequality in life expectancy between the most and least deprived areas of the Borough. Bury's life expectancy is 78.1 for males and 82 for females for 2023, which is similar to the North West averages (77.7 and 81.7) but slightly lower than the England averages (79.3 and 83.2)[20].

[18] Office for National Statistics, 2025
[19] GOV.UK English Indices of Deprivation, 2025
[20] Office for Health Improvement and Disparities, 2025

Childhood Obesity in Bury

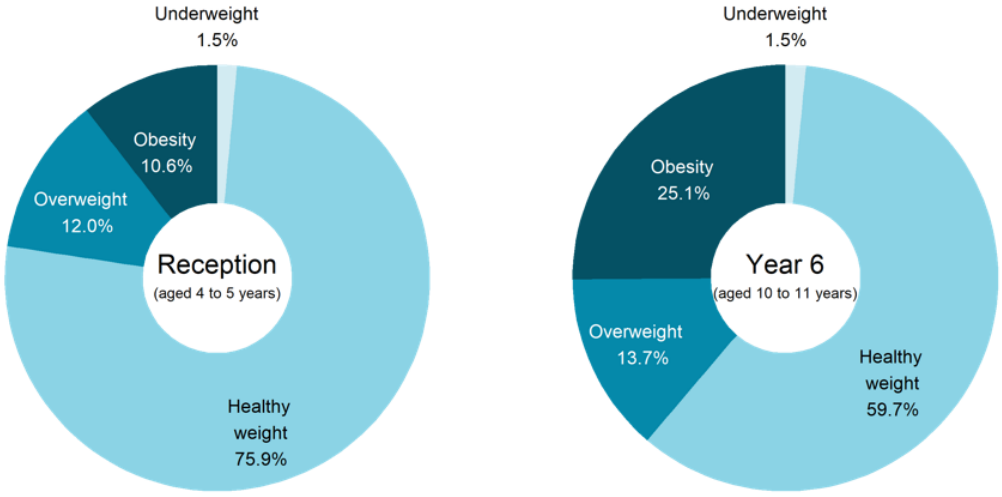
3.12 The latest National Child Measurement Programme (NCMP)[21] for 2024/25 shows an increase in levels of obesity for children in both Reception and Year 6. The levels are similar to the national average for children in Reception but larger than the national average in Year 6.

3.13 In Reception, 10.6% of children in Bury compared to 10.5% of children nationally are obese (including severe obesity). In Year 6, 25.1% of children in Bury compared to 22.2% of children nationally are obese (including severe obesity). Improved access to high quality open spaces can lead to increased participation in sport and physical activity.

3.14 The table below shows the percentage of overweight and obese Reception and Year 6 children in Bury from the NCMP (2024/25) in comparison to the region and England as a whole.

	Reception			Year 6		
	Bury	England	Northwest	Bury	England	Northwest
Underweight	1.5%	1.1%	0.9%	1.5%	1.6%	1.4%
Healthy Weight	75.9%	75.4%	74.1%	59.7%	62.2%	60.6%
Overweight	12.0%	13.0%	13.5%	13.7%	13.9%	14.3%
Overweight (Including obesity)	22.6%	23.5%	25.0%	38.8%	36.2%	38.0%
Obesity (including severe obesity)	10.6%	10.5%	11.5%	25.1%	22.2%	23.6%
Severe obesity	2.7%	2.9%	3.2%	5.7%	5.6%	6.2%

3.15 The below pie charts visualise the percentage by BMI categories in Bury for Reception and Year 6 for 2024-25.



3.16 Bury has seen an increase in the percentage of children in Reception classed as overweight (including obesity), up by 1.5% from 21.1% in 2023/24 to 22.6%

[21] https://www.nhs.uk/live-well/healthy-weight/national-child-measurement-programme/

in 2024/25[22]. This mirrors the trend seen nationally, up by 1.4% from 22.1% in 2023/24 to 23.5% in 2024/25.

3.17 Bury has also seen an increase in the percentage of children in Year 6 classed as overweight (including obesity) up by 3.3% from 35.5% in 2023/24 to 38.8% in 2024/25[23]Although Bury has mirrored an increased trend nationally, Bury's increase in the overweight (including obesity) category is much larger at 3.3% compared to an increase of only 0.4% nationally, from 35.8% in 2023/24 to 36.2% in 2024/25. Bury was 0.3% below the national figure in 2023/24 but is now 2.6% above the national average for 2024/25.

Links between Childhood Obesity and Deprivation

3.18 In Bury, prevalence of obesity (including severe obesity) for the 5-year period 2020/21 to 2024/25 combined showed 10.9% of Reception children living in the most deprived quintile were classed as obese, 9.5% in both the second most and the average deprived quintiles, 9.3% in the second least deprived quintile and 6.5% in the least deprived quintile. This indicates a trend of increasing levels of obesity in Reception children as deprivation increases. This is consistent with the previous time period, when levels of obesity also increased with levels of deprivation. It is also consistent with the trend seen nationally as levels of obesity increase as deprivation increases[24].

3.19 For Children in Year 6, the prevalence of obesity (including severe obesity) for the 5-year period 2020/21 to 2024/25 combined showed 28.7% of Year 6 children living in the most deprived quintile were classed as obese, 26.5% in the second most deprived quintile, 23.0% in the average deprived quintile, 19.3% in the second least deprived quintile and 16.2% in the least deprived quintile. This again highlights a trend of increasing levels of obesity in Year 6 children as levels of deprivation increase, consistent with the trend in the previous time. This is also consistent with the trend seen nationally, where levels of obesity are higher amongst higher levels of deprivation[25].

Adult Obesity in Bury

3.20 In 2023/24, 65.3% of adults in Bury were overweight or obese, similar to the figure for England of 64.5%. Although this is a decrease of 1.9% from 2022/23, the rate in Bury has increased over recent years from 59.6% in 2018/19. Bury has lower levels of overweight and obesity than the North West average for 2023/24 (66.7%).

[22] Obesity, physical activity and nutrition - Data | Fingertips | Department of Health and Social Care
[23] Obesity, physical activity and nutrition - Data | Fingertips | Department of Health and Social Care
[24] Obesity, physical activity and nutrition - Data | Fingertips | Department of Health and Social Care
[25] Obesity, physical activity and nutrition - Data | Fingertips | Department of Health and Social Care

3.21 High takeaway outlet density is strongly associated with increased fast-food consumption and higher adult obesity prevalence, which in turn elevates risks for diabetes, cardiovascular disease, and liver disease[26].

3.22 In England, adults who are obese are 5 times more likely to develop type 2 diabetes[27] than adults of a healthy weight, with 90% of adults with type 2 diabetes currently classed as being either overweight or obese. In Bury, in 2023/24, 8% of adults have a prevalence of type 2 diabetes with recent trends showing an increase.

3.23 Obesity is a major risk factor for non-alcoholic fatty liver disease (NAFLD) and can exacerbate alcohol-related liver damage. Public Health England evidence shows that areas with dense takeaway outlets have higher obesity prevalence, which correlates with increased liver disease mortality under the age of 75. In Bury in 2024, the mortality rate from Liver Disease for those under the age of 75 has been highlighted as a concern with 42 deaths with obesity as a contributing factor[28].

Links between Deprivation and Fast-Food Outlets

3.24 As well as the link between deprivation and obesity, research has also established a link between levels of deprivation and the proliferation of fast-food outlets. Greater exposure to hot food takeaways is linked to increased consumption of energy-dense, nutrient-poor foods, contributing to higher rates of overweight and obesity among children, as confirmed by the National Child Measurement Programme and multiple UK studies[29].

3.25 High densities of hot food takeaways can also contribute to an obesogenic environment that discourages active lifestyles. Evidence shows that areas with greater fast-food availability often have lower walkability and fewer green spaces, while promoting sedentary behaviours through convenience-based eating. This correlates with reduced physical activity levels and higher inactivity rates, which amplify risks of obesity and chronic disease[30].

3.26 Fast food outlets represent a popular, cheap convenient service. They provide an important complementary use in our main and local centres; can attract trade and provide local jobs. Nevertheless, it is also recognised that many of our streets can become saturated with fast food outlets, selling food such as chips, burgers, kebabs, fried chicken and pizza. The sheer density of these outlets may make it easier for us to consume too much, too often – and the fact

[26] NICE Obesity Guidance, 2015
[27] Type 2 diabetes accounts for at least 90% of all cases of diabetes. It occurs when the body either stops producing enough insulin for its needs or becomes resistant to the effect of insulin produced. The condition is progressive requiring lifestyle management (diet and exercise) at all stages. Over time most people with type 2 diabetes will require oral drugs and or insulin
[28] https://theburydirectory.co.uk/jsna
[29] Public Health England, 2020.
[30] Public Health England, 2021; NICE Physical Activity Guidance, 2018.

that most outlets have no or limited nutrition information in store can make informed choices difficult.

3.27 In seeking to tackle obesity, reducing easy access to calorie-dense food is an important aim. Whilst modifying the environment to ensure less reliance on the private car can help in ensuring we all live more active lifestyles, many areas of the country, particularly those with high levels of deprivation, are often further disadvantaged by an 'obesogenic environment', in particular from an over-prevalence of fast-food outlets.

4 What is a Hot Food Takeaway?

4.1 The Town and Country Planning (Use Classes) Order 1987 (as amended)[31] draws a distinction between a shop (including sandwich shops), a restaurant or café which are in Use Class E and a hot food takeaway. Establishments whose primary business is the sale of hot food where the consumption is mostly undertaken off the premises is Sui Generis (in a class of its own).

4.2 The proposed layouts of such premises provide a clear guide as to whether the use of the premises will fall into the A3 (restaurant) or the Sui Generis (hot food takeaway) Use Class.

4.3 In deciding whether an application is for a hot food takeaway, consideration will be given to the proportion of space designated for hot food preparation. Restaurants and cafes often have an ancillary takeaway element, and hot food takeaways can have ancillary eat-in facilities.

4.4 Where the hot food takeaway element of a proposal is equal to or larger than the non-hot food takeaway element the guidance in this SPD will apply to that proposal. To determine the nature of a proposal the operation of the premises will be considered, particularly:

- The proportion of space designated for food preparation and other servicing in relation to designated customer circulation space.
- The number of tables and chairs to be provided for customer use.
- The hours of opening; and
- The percentage of the hot food takeaway use to the overall turnover of the business.

4.5 The applicant will be expected to provide detailed floor plans to demonstrate the above and that the proposed use will be the primary business activity. For clarity, the table below sets out examples of uses which are considered to be hot food takeaways, and those which are not. This list is not exhaustive:

Examples of Hot Food Takeaways	Examples of other uses
Fish and Chip Shops	Restaurants/Snack Bars/Cafes
Pizza Takeaway	Sandwich/Deli Shops
Chinese/Thai Takeaway	Bakeries
Indian Takeaway	Coffee Shops
Burger Takeaway	Public Houses/Wine Bars
Fast Food Drive Through	Ice Cream Shops/Parlours
Chicken/Southern Fried Chicken Shops	Night Club
Kebab Takeaway	Shisha Bar

[31] The Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020: https://www.legislation.gov.uk/uksi/2020/757/made

5 Guidance

Is planning permission required?

5.1 This SPD sets out the principles that apply to hot food takeaways (as defined in Section 4) where planning permission is required, for example, new hot food takeaways or applications for a variation of opening times (Section 73 application).

5.2 Planning permission is required to build a new premises for a hot food takeaway (Sui Generis use). The Town and Country Planning (Use Classes) Order 1987 (as amended) subdivides different development types into separate classes of use. In general, to change the use of a property from one use to another requires planning permission. Permission is also needed to convert a Class E commercial property to a hot food takeaway.

5.3 Where a property currently has permission for use as a hot food takeaway, planning permission is not required to use the property for any other type of hot food takeaway. However, the conditions attached to the previous planning permission, such as restrictions on opening hours, will still apply.

5.4 External building works or alterations that materially change the appearance of an existing hot food takeaway, such as the building of an extension or the installation of a new shop front to the property will usually require planning permission. External shutters and grilles also usually require planning permission. Separate advertisement consent is sometimes required to display shop advertisements. For example, consent would be required for signs above fascia level, including projecting signs or banners, and illuminated signs of any kind.

Planning application considerations

Hot Food Takeaway Planning Matrix

5.5 The Council wants to take a balanced and fair approach to supporting local business and economic growth whilst also taking steps to ensure our environments support the health and wellbeing of our residents.

5.6 Therefore, to reflect the complexities of the obesogenic environment, the Council has developed a tool which will support the decision-making process for hot food takeaway proposals.

5.7 The matrix will inform any decision on proposals for new hot food takeaways based on their proximity to secondary schools within the Lower Super Output Area (LSOA) that it is located within. The Matrix will also consider obesity levels

in primary school Year Six pupils within the LSOA and if there are five or more existing hot food takeaways within the LSOA.

5.8 **Proposals for all new hot food takeaways will be assessed against the Matrix and proposals that are not accepted by the Matrix will be refused, unless other material considerations indicate otherwise**.

Proximity to Schools

5.9 Reducing children's exposure to foods contributing towards obesity such as those sold in hot food takeaways can reduce access to food and drink that is high in fat, salt and sugar.

5.10 A specific issue has been identified with teenagers leaving secondary schools at lunchtimes to access hot food takeaways. Children in primary school do not normally leave school premises during school hours but research indicates that the most popular time for purchasing food from shops is after school[32].

5.11 Whilst hot food takeaways within easy walking distance of schools can provide an attractive and affordable food option for pupils. The aim of this guidance is to ensure that during times when children are making food choices, such as lunchtime and after school, the environment and availability of hot food takeaways is not encouraging unhealthy choices.

5.12 In an effort to establish appropriate healthy eating habits and reduce the rate of childhood obesity in the local population the Council considers it appropriate to restrict the establishment of new hot food takeaways around secondary schools. **Therefore, planning permission will not be granted for new hot food takeaways which are located within a 400m radius of secondary schools.**

5.13 It is not considered appropriate, at this time, to restrict hot food takeaways around primary schools as there is no comparable evidence to suggest that the location of hot food takeaways acts as an obstacle to primary school children eating healthily. It is thought that the majority of primary school children are not permitted out of the school grounds during the school day, and that they are more likely to be accompanied by an adult on their way to and from school.

5.14 A detailed map showing the 400m restrictive zones around secondary schools can be found within Appendix 1. This map is to be used by potential applicants and those involved in the determination of planning applications to ascertain whether a premises falls within a 400m zone.

5.15 The schools shown in the mapping do not constitute a definitive list. School locations may change over time, and this guidance will be updated to

[32] The school fringe: from research to action. Policy options within schools on the fringe (2009) Sinclair, S; Winkler JT. Nutrition Policy Unit, London Metropolitan University

accommodate such changes. Where a school is opened or relocated, its new location will automatically have an exclusion zone because of this guidance.

5.16 A school that is outside of Bury's Local Authority boundary but is within 400m of the Bury boundary will be considered as having a 400m exclusion zone from its nearest site boundary point to a proposed hot food takeaway site within the Bury local authority area.

Locations where there are high levels of obesity

5.17 As set out in Chapter 3, childhood overweight and obesity rates in Bury remain significantly above national averages, with NCMP data showing that more than 25% of children in some Lower Super Output Areas are affected. These figures have risen in recent years, alongside an increase in hot food takeaway outlets and evidence demonstrates a clear association between the density of hot food takeaways and unhealthy weight outcomes, particularly in deprived communities.

5.18 In assessing planning applications for new hot food takeaways, consideration will be given to levels of excess weight of 10-11 year old pupils (primary school year six pupils). I**n Lower Super Output Areas[33] where obesity levels in primary school Year Six pupils are more than 25% and there are more than 5 existing hot food takeaways within that ward, planning permission will not be granted on the grounds that it would be harmful to public health.**

5.19 Applying a more than 25% Year Six obesity threshold ensures that restrictions target areas with the greatest health need, supporting local and national public health objectives to reduce obesity, improve diet, and promote healthier environments. This approach aligns with NPPF guidance and reflects Bury's commitment to tackling health inequalities through spatial planning.

Over-proliferation

5.20 An over-proliferation of hot food takeaway uses situated within close proximity may result in harmful impacts on residential amenity, as well as displace other uses and reduce options for healthier food choices. This could lead to negative outcomes on the vitality and viability of a centre or parade.

5.21 Increased numbers of customers congregating around hot food takeaways, particularly in the evenings, can also lead to problems of increased noise, disturbance and crime levels, fear of crime or anti-social behaviour. These impacts can be intensified where hot food takeaway uses are clustered together.

[33] Lower layer Super Output Areas (LSOAs) comprise between 400 and 1,200 households and have a usually resident population between 1,000 and 3,000 persons (ONS, 2025).

5.22 Therefore, when considering whether the cumulative impact of introducing a new hot food takeaway would be detrimental to public health regard will be had to:

- the number of existing hot food take away establishments in the immediate area and their proximity to each other.
- the type and characteristics of other uses, such as housing, shops and public houses; and
- any known unresolved amenity, traffic or safety issues arising from existing uses in the area.

5.23 In order to avoid clustering, **there should be no more than two consecutive hot food takeaways in any one length of frontage. Where there are already existing hot food takeaways in any one length of frontage, a gap of at least two non-hot food takeaway uses shall be required before a further hot food takeaway will be permitted in the same length of frontage.**

Health Impact Assessments

5.24 Applications for new hot food takeaways will be required to include a Health Impact Assessment. (HIA). The HIA will be taken into consideration during assessment of the application.

Other Considerations affecting Hot Food Takeaways

Residential Amenity

5.25 One of the most common concerns about hot food takeaways is the impact on amenity especially residential, from noise, odours, litter, vermin, road safety, traffic generation and anti-social behaviour. Careful consideration should be given to ensuring the lives of people in the local area are not negatively affected by amenity issues.

5.26 The activities associated with hot foot takeaway establishments often tend to peak at times when the surrounding background noise levels are considered to be low (e.g. late evenings). Odours, noise and vibrations generated from cooking activities and extraction equipment used in these premises, together with traffic disturbance, litter and the attraction of large numbers of people at particular times of the day mean that hot food takeaways can produce a higher degree of noise and disturbance to local residents than other kinds of retail use. This noise generated by the proprietor and from the customers can be very difficult to control.

5.27 In view of this, it is not normally considered acceptable to locate hot food takeaways directly adjacent to residential properties, regardless of the nature or effectiveness of the extraction system installed.

5.28 Applications for hot food takeaways close to residential properties must:

- Consider impacts on residential amenity in terms of noise disturbance, vibrations, odours, traffic impacts, litter or hours of operation because of the proposal.
- Accommodate extract equipment internally within the building and rooted within existing chimneys where practicable. Where external equipment is proposed, it should not be detrimental to the area or host property.

5.29 The development of new hot food takeaways or the expansion of existing units which would result in an unacceptable adverse impact on residential amenity will not be permitted.

Hours of Operation

5.30 Late night opening hours can cause intolerable levels of disturbance to residents, attracting higher customer numbers in the afternoon and late evenings. It is necessary to consider planning conditions on the planning permission for a hot food takeaway proposal to control the nature of the use and the impacts on the surrounding area.

5.31 When determining the appropriate hours of operation for hot food takeaways consideration will be given to:

- The likely impacts on residential amenity.
- The existence of secondary schools either within or outside Local Education Authority control within 400m.
- The character and function of the immediate area; and

  The potential benefits of the proposal for the wider community.

5.32 Sites outside of designated centres will usually be subject to more restricted opening hours.

5.33 Within designated centres, where there is no residential accommodation in close proximity to the premises, it is not likely that any restrictions will be placed on the hours and days of operation. Takeaway premises in areas with a greater focus on commercial activity generally serve other establishments, which form a part of the evening economy. To reflect this, restrictions on opening hours in such locations will be less rigid as compared to the more residentially focused takeaway premises.

5.34 In designated centres, with residential use in close proximity, opening hours are likely to be restricted to between 08:00 and midnight.

5.35 The proposed hours and days of opening should be specified as part of applications for hot food takeaway development. Hours of opening will be made a condition of the planning permission if it is granted.

Highway Safety

5.36 The impact of hot food takeaways on traffic flow and road safety is an important consideration when determining applications. Hot food takeaways tend to attract a high proportion of car borne and short stay customers and outside the town centre and designated areas are often located where there is limited parking provision.

5.37 In all locations, planning permission for hot food takeaways will only be granted where there would not be an adverse impact on public or highway safety. Regard should be given to:

- Existing traffic conditions including availability of parking spaces.
- Availability of safe and legal loading areas.
- Proximity to junctions, pelican crossings, bus bays and bus stops.
- Accessibility of the site by public transport and cycling.

5.38 Where a proposal is considered to have an unacceptable impact on highway safety, planning permission will not be granted.

Disposal of Waste Products and Customer Litter

5.39 As it is a legal requirement that businesses that produce waste comply with the Environmental Protection Act 1990 (s34 Duty of Care etc as respects waste), the appropriate disposal of all waste arising from the operation of a hot food takeaway will be a material consideration when such applications are received.

5.40 It is important that the waste generated by the operation of a hot food takeaway does not detract from the character of the area or cause nuisance to other users or occupiers in the vicinity. Proposals will not be acceptable if waste cannot be adequately stored and if proper access for refuse collection vehicles cannot be safely provided.

5.41 All waste generated by the business should be accommodated on site where practicable. If this is not possible the bin store must be on site and adequately screened in a manner and location that does not detract from the street scene or the character of the area and that does not cause odour nuisance to neighbouring occupiers.

5.42 Consideration should also be given to the need to mitigate for the impact of customer waste on the surrounding area.

5.43 All applications must be accompanied by a Waste Management Strategy which should cover storage and disposal of waste including provision of grease traps where appropriate. It should also consider recycling and the use of sustainable food packaging, such as cardboard boxes and paper straws.

Noise abatement and extraction of odours

5.44 A common concern associated with hot food takeaways is the impact on the amenity of adjoining occupiers through the generation of noise and odour, usually from ineffective, inappropriate and/or badly maintained kitchen odour control and extract systems or inadequate noise attenuation measures.

5.45 Proposals for new hot food takeaways must demonstrate effective kitchen odour control and extract systems and appropriate noise attenuation measures. Noise attenuation and odour control measures must:

- Have minimal impact on visual amenity, including location and external finish.
- be acoustically attenuated.
- not have an unacceptable impact on the amenity of neighbouring occupiers, for example by virtue of vibration or odour.
- be properly operated, serviced, cleaned and maintained in accordance with industry best practice; and
- where appropriate, be improved to reflect any subsequent changes in the mode or type of cooking that could increase odours

5.46 All applications must be accompanied by an Odour and Noise Impact Assessment. This should include full details of the extraction system proposed including the internal layout and external appearance showing the location of all the main components of the system, together with details of any necessary noise attenuation and odour abatement measures.

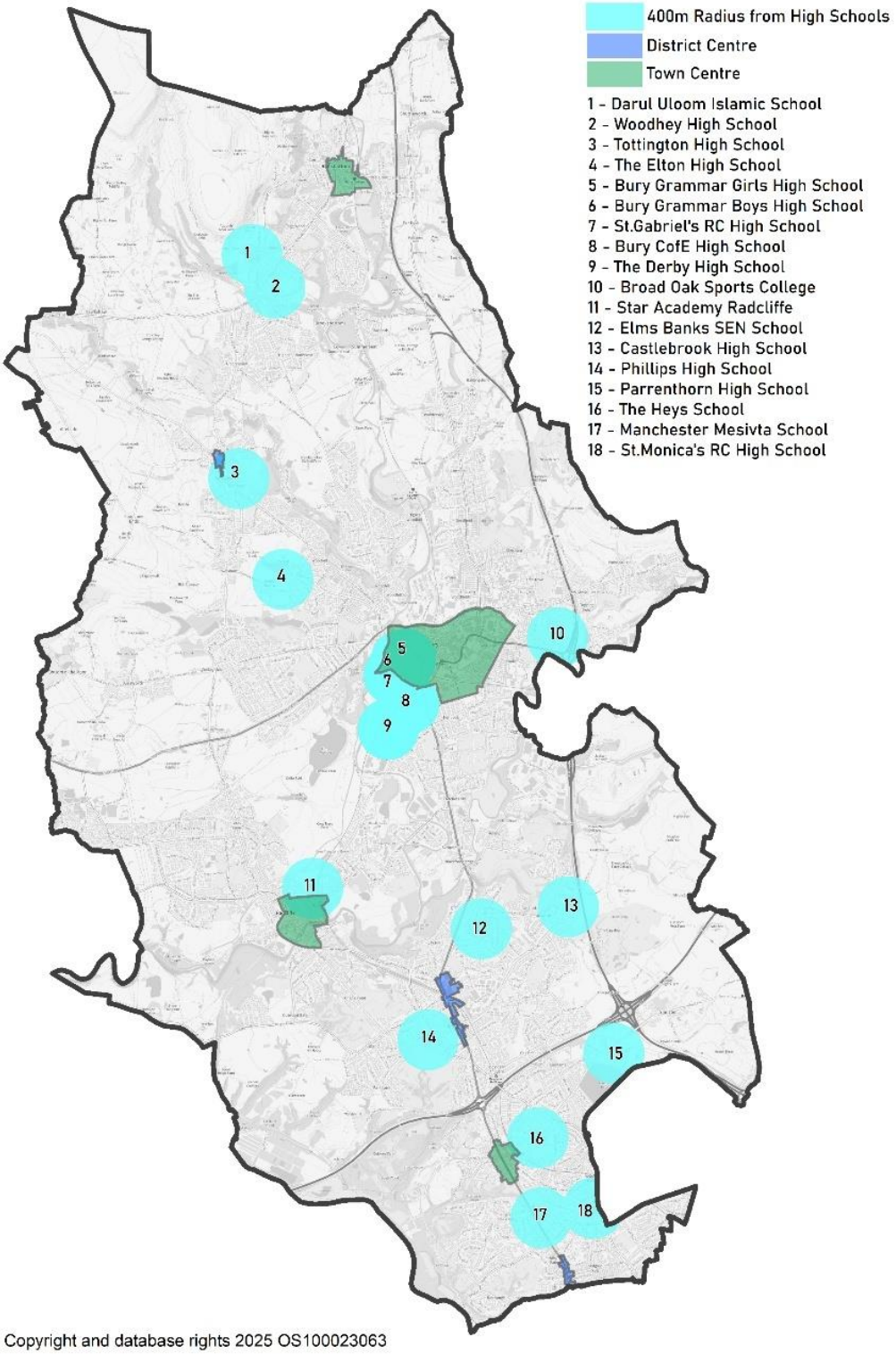
6 Monitoring and Reporting

6.1 The successful implementation of this SPD will be assessed through the Annual Monitoring Report (AMR). The AMR will note when the SPD has been used in determining planning applications, the number and location of new hot food takeaways permitted and refused, and the new hot food takeaways approved with restricted opening hours. Monitoring will also include whether there has been a reduction in both childhood and adult obesity.

6.2 The Council's AMR will highlight any issues that may need a review. Where such a review is required, a timetable for this activity will be included in the Local Development Scheme as resources permit.

6.3 Changes in National or Regional Planning Policy or progress on Development Plan Documents, which form a part of the Local Plan, may also prompt the need for further reviews.

Appendix 1- 400m School Exclusion Zones



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Bury
Council

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Agenda Item 7

Classification: Open	Decision Type: Key

Report to:	Cabinet	**Date:** 15 January 2026
Subject:	Disposal of land at Chamberhall Business Park	
Report of	Leader and Cabinet Member for Strategic Growth	

Summary

1. Significant regeneration activity has been delivered on council owned land at the Chamber Hall site in Bury by St. Modwen Developments. Although the scheme has been a significant success, the developer was unable to deliver development at the final regeneration area, a circa 5 acre plot which the council has now been held for some time.

2. The council own the last remaining portion of undeveloped land within the wider Chamberhall Business Park and have progressed an interest in the site to dispose of the property for the delivery of a head office facility and some further employment space.

3. The land is part of the Council's Accelerated Land Disposal Program (ALDP) and previous attempts to sell the site in 2022 fell through due to changes in market conditions affecting development viability.

4. The council would like to see a diverse mix of development on the Chamber Hall site. It is felt that the town centre will benefit from greater job density offered through an office use on the site, which is easily accessible from the town centre core. An office use would bring greater economic and other benefits to Bury than an industrial use.

5. The land in question has a negative residual value for office use due to current prevailing demand, market conditions and construction costs. It also has a negligible land value for industrial use following due diligence work carried out to date. There is significant sensitivity in this valuation – in particular rental and investment yields are particularly impactful on land value and small changes have the ability to wipe out any positive valuation on the basis of industrial use. This happened under the previous disposal strategy. This proposed transaction gives the council certainty of development at the site and insulates it from the impact of any further market volatility.

6. Interest has been received from a prominent local business, Crown Gas and Power Limited (Crown G&P), with a view to delivery of high-density office-

based employment on the site. This is directly in line with council aspirations for this area of Bury Town Centre and delivers numerous benefits.

7. It is proposed that the site be disposed of for office use to Crown G&P. This transaction will result in a subsidy under the UK Subsidy Control Regime for which the council feels there is strong justification.

Recommendation(s)

8. Note previous attempts to sell the site and the alternative options, as set out below

9. Approve the disposal of the two plots of council land at Chamberhall to Crown G&P to facilitate the delivery of a new head office facility on plot 1 and industrial development on plot 2, (shown edged red on the plan in Appendix 2) subject to the Council carrying out an assessment of the subsidy's compliance with the subsidy principles set out in Schedule 1 of the Subsidy Control Act 2022, and subject to the Council making the decision that the subsidy is consistent with those principles

10. Delegate the making of required entry on to the Subsidy Database to the Assistant Director for Corporate Assets and Facilities Management.

11. Delegate the signing of all contracts required to complete the sale of the Site to the Director of Law and Governance.

Reasons for recommendation(s)

12. The proposed disposal enables the Council to facilitate the delivery of a new head office on behalf of an established regional business, with the following benefits;

- bringing in the region of 250 jobs to the borough.
- The proposed scheme will generate an estimated £310,000 per annum in business rates.
- Generate £8.0 million net additional GVA annually to the local economy and an increase in footfall and spending in Bury town centre, supporting local shops, cafés, and services, with estimated gross expenditure of £560,000 per year as estimated by Amion, as more fully detailed within the body of the report.

Alternative options considered and rejected

Dispose the whole site on the open market

13 a – Sale of Property by Private Treaty (via a marketing campaign). This approach would not provide the certainty of the proposed transaction and would lead to a much longer time for delivery of employment space and therefore the associated jobs.

b – Auction
This approach could provide certainty on disposal timing but would lead to a much longer time for delivery of potential employment space and therefore the associated jobs.

Both routes may lead to a new owner land banking the site which would not bring forward the jobs or business rates for the borough. These factors could be mitigated in a sale contract, but their inclusion could supress the sale price achievable.

Seek a development partner via a new tender exercise.

14 The Council could proceed with a further tender exercise for a developer to deliver an industrial scheme, however this is unlikely to provide a larger capital receipt.

This route has been explored previously and restarting this process would also be subject to economic impact during the selection/planning period and legal review

It should be noted however that whilst CBRE valued the site at £1.825m there Is a risk that during any post-tender period any changes to external economic factors could result in changes in the valuation fundamentals (as has happened in the previous tender exercise) which could negate the potential capital receipt. The Nolan Real Estate report reporting negative land values highlight the sensitivity on land value the key development inputs. Analysis of CBRE's and Nolans' valuation's detailed in the main body of the report

Dispose of the site on plot-by-plot basis.

15. Selling the site as a whole provides economies of scale for delivery which would otherwise not be available if the sites were disposed of in isolation. This disposal method is also subject to the same risks as set out on a whole site disposal above.

Self-develop for industrial use

16. There is significant risk and cost involved in this option. Due to the council resource position (financial and staffing) this has been discounted. This option would also provide a negative return.

Self-develop for office use

17. Financially this would provide an even larger negative return and even if financially viable would provide significant risk and cost to the Council.

Do nothing

18 This option does not provide the economic growth, job opportunities or any capital receipt. There are also ongoing liabilities for holding the land.

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Background

19 Chamberhall Business Park is located to the Northwest of Bury Town Centre with Harvard Road, the main spine road serving the business park, linking directly to the A56, Peel Way. The A56 forms part of the Bury ring road which provides access to the main arterial routes into the town and access to the M66 motorway at Junction 2 (approx. 1.7 miles) and onto the National Motorway Network.

20 St. Modwen Developments completed the development of the first phase of high-quality light industrial floorspace at Chamberhall. Their scheme has provided over 120,000 square feet of floorspace across 14 units of various sizes and is fully let.

21 Additional development at Chamberhall includes high quality buildings for the Government Chemist (LGC), GM Fire and Rescue Community Fire Station and the GM Police Bury Divisional Headquarters. More recently building merchant MKM have taken a new depot. A small scheme of speculative industrial space is currently under construction at Chamberhall.

22 The final phase of land owned by the authority consists of c.5 acres of net developable land. A tender to procure a development partner was undertaken in 2021 and during this process 6 bids were received (of the bids received 4 were subject to further ground investigation and the two unconditional offers were significantly lower than the conditional proposals).

23 A development partner was chosen however the chosen partner was unable to progress on the terms agreed within the tender due to economic uncertainty and fundamental changes to the financial appraisals carried out at the time and therefore did not proceed to completion.

24 In late 2023 CBRE were appointed and carried out a development feasibility study for industrial development on the site. All potential delivery options produced a negative land value. See Appendix 1

25 Whilst the site is still part of the Council's Accelerated Land Disposal Program (ALDP) due to CBRE's advice no marketing of the site has since taken place, as construction costs have continued to rise, outstripping any increase in value from increase in rents.

Proposed Sale to Crown Gas & Power Ltd

26 In late 2024, Place colleagues were approached by real estate advisors of Crown G&P regarding their office requirement for the area and to ascertain if the council were disposing of any suitable existing properties. The Accelerated Land Disposal Programme (ALDP) programme was reviewed, and no suitable existing building was identified. They also indicated that consideration for a new building office would be considered and Chamberhall was then discussed as a potential location.

27 Negotiation took place with Crown G&P and the concept of a land sale to facilitate delivery of the office and provide in the region of 250 jobs for the borough on the edge of Bury Town centre. This will increase economic activity in the town as detailed by the benefits analysis carried out by Amion and detailed in paragraph 51 of this report.

28 Crown G&P is part of the successful Crown Oil Group of Companies, which is a local 3rd Generation family-owned business with an annual turnover of more than £1billion and employs over 1500 people. Crown G&P are already significant employers in the borough with offices in the town centre and further offices and workshops in Pilsworth. Crown G&P are also investing heavily in Warth Business Park with the development of a new Adblu production facility.

29 Crown G&P has significantly increased its turnover and profitability in the past 3 years and plans to grow that turnover again over the next 5 years. It currently supplies 3% of the UK's commercial mains gas. The proposed office will accommodate up to 250 employees as the business grows over the next 3 years.

30 Draft heads of terms have been agreed with Crown G&P for the sale of the site and are set out in Appendix 2. The principal terms are set out in paragraphs 30 – 33 below

31 The transaction comprises the sale of 2 adjacent plots of land (plot 1 and plot 2). Plot 1 would be sold at £1 and plot 2 sold at £200,000. A plan showing the 2 plots is in Appendix 3.

32 The Development of plot 1 would deliver a 40,000 sqft office building for Crown G&P's own occupation. Development of plot 2 would deliver a multi-let industrial

scheme of around 25,000 sqft. An outline of Crown G&P's Proposals in in Appendix 4.

33 The sale will be subject to the receipt of planning permission for the proposed uses. The purchaser will be required to commence development of plot 1 within 12 months of receipt of planning permission. If work has not commenced within the prescribed timetable the council will have the option to buy back the site for £1.

34 Plot 2 will be sold for £200,000 however subject to an overage clause which would allow the council to receive an overage payment when the land use provides a value over the purchase price.

Valuation Considerations

35 As noted in paragraph 23 above, whilst CBRE carried out a series of feasibility studies in late 2023, which showed that development of the site for industrial use would not be viable, the Council still required updated valuation advice to capture any market changes in the last two years and sale for a proposed alternative use.

Valuation advice - CBRE

36 The Council instructed CBRE to provide independent valuation advice on three options. A copy of the valuation report is in Appendix 5.

- Open Market Value of the whole site.
- Value for industrial use on Plot 2.
- Value for office use on Plot 1.

37 CBRE's open market valuation for the whole Chamberhall site is in the region of £1.825m. CBRE however stated in the report, that the valuation figure, is subject to a significant number of caveats. Principally, it does not take account of,

a. any abnormal site conditions which are expected of a site of this nature which has had numerous historic industrial uses.
b. Biodiversity Net Gain costs

38 CBRE valued Plot 2 at £200k, which is the same as the agreed sale price.

39 CBRE have valued Plot 1 for an office use at £1, as the costs of constructing the building are greater than its completed value.

40 The CBRE open market valuation figure of £1.825m for the whole site takes into account various market factors prevalent at the date of the valuation, such as.

- Rents - £12.50 per sqft

- Yields – 6%
- Interest rates – 6.25%
- Construction costs - £106 per sqft

As these factors can change following the valuation date, CBRE carried out a series of sensitivity tests, which are highlighted in the table below.

Land Value with yield and construction cost changes					
Yield	Construction Costs				
	-10%	-5%	No Change	+5%	+10%
5.5%	£3.725m	£3.31m	£2.9m	£2.48m	£2.07m
5.75%	£3.16m	£2.72m	£2.34m	£1.93m	£1.51m
6%	£2.64m	£2.24	**£1.825m**	£1.41m	£1.0m
6.25%	£2.18m	£1.77m	£1.36m	£0.94m	£0.53m
6.5%	£1.75m	£1.33m	£0.92m	£0.51m	£0.09m

41 As shown in the table above the notional land value of £1.825m changes significantly with only minor movement in yields or construction costs. A quarter percentage change in yield for example has +/- change of £450k to the land value. A similar analysis with rents and interest rates would have a similar impact on land values as a +/-50p in change in rent has a £700k impact on land values

42 Crown G&P have carried out an initial desktop exercise of the likely additional costs for plot 2, which amounts to £303k on a site area of 1.6 acres. CBRE used these additional costs assess the value on Plot 2 at £200k. If CBRE had assessed these costs on a pro rata basis on development appraisal for the whole site of 5.3 acres, the value would have reduced to £925K from £1.825m.

Further Valuation Advice - Nolan Redshaw

43 Due to the caveats, contained within the CBRE Valuation, The Council also sought further independent valuation advice from Nolan Real Estate, a Bury based firm who may have more detailed local knowledge than CBRE a national firm. Nolans have based their valuations on detailed development appraisals. With the three options being as follows.

- Value for industrial on whole site.
- Value for industrial use on Plot 2.
- Value for office use on Plot 1.

A copy of the valuation report is at Appendix 6

44 In valuing the whole site Nolan's, carried out a development appraisal, based on an industrial scheme of circa 81,000sqft. The development appraisal produced a negative land value of £1.15m. Nolans have however stated in

their report that this is not an open market unrestricted used valuation as they have made a special assumption based on an assumed industrial scheme.

45 Nolan's have stated that whilst their development appraisals show a negative land value for all options, they would value site on an open market basis at figure similar to CBRE and make the same statement that deductions would be required due to BNG and site specific abnormals.

46 Whilst Nolan's have valued the whole Chamberhall site based upon industrial development at -£1,150m, in reality a landowner would not set at such a figure.

47 Nolan's have valued Plot 1 for the proposed office development at -£2.59m as the costs of constructing the building are substantially greater than its completed value.

48 Nolan's valuation for industrial on Plot 2 is -£338,000, which is below the agreed sale price of £200,000. In addition, an overage provision has been agreed with Crown G&P, whereby council would share in any uplift in value following completion of the development. A similar overage provision was included in the development of phase 1 of the regeneration at Chamber Hall and the council received an overage payment from the developer on completion of the development

Valuation Summary

49 Given that two independent valuers have made the same statement associated with an open market land valuation for the whole site, it is highly unlikely that the Council would be able to obtain a true achievable Open Market figure, which takes into account site specific costs, at this time.

Subsidy Control

50 The Council is likely to be granting a subsidy to Crown G & P should the transaction be concluded on the proposed terms. This is because each of the four limbs of the test for a subsidy set out within the Subsidy Control Act 2022 appear to have been met as the disposal to Crown G&P appears to be at an undervalue.

51 There is some uncertainty about the value of any subsidy, which would be calculated as being the difference between the open market, unrestricted value of the Site, and the disposal price. As discussed above, although the headline figure obtained by the Council from CBRE in its open market, unrestricted valuation of the whole Site is £1,825m (and as broadly confirmed by Nolan Redshaw), both valuers acknowledged that this figure would be subject to deductions for abnormal costs and Biodiversity Net Gain costs and as such costs have not been quantified, officers consider that it is not possible

to confirm an accurate valuation figure for the purposes of determining the value of the subsidy. The subsequent clarification advice from the valuers is included within Appendices 7 & 8.

52 Therefore, the value of the subsidy to be granted to Crown G&P is within a range of £1 to £1.625 million (£1.825million valuation – minus £200k sale price). This will be subject to subsidy assessment.

Economic Analysis and Impact Assessment of Crown Gas and Power Ltd's Proposal

53 To support the proposal, Bury Council has commissioned a detailed economic analysis and impact assessment by Amion Consulting. This considered the delivery of the proposed disposal and subsequent development to 'business as usual' and industrial development scenarios – equating for leakage, displacement, economic multiplier and deadweight effects. A copy of the report is in Appendix 9. The economic and social benefits of the proposed freehold disposal of the Chamberhall site to Crown G&P are as follows:

- Strategic Alignment - The proposed disposal directly supports Bury Council's corporate priority to drive economic growth and aligns with the "Let's Do It!" vision for faster-than-average economic growth and reduced deprivation. The scheme delivers high-quality employment space in a sustainable, accessible location, supporting the Bury Economic Strategy (2024–2034) and the Council's ambition for a fairer, greener, and more competitive economy.

- Economic and Employment Benefits - The development will bring a long-term vacant brownfield site back into productive use, unlocking 7,000m² of flexible employment space for offices and industrial uses. It is projected to support 52.5 gross FTE construction jobs (30 net additional) and deliver a net additional construction GVA of £3.2 million. Once operational, the scheme is expected to create 171 net additional FTE jobs, compared to 90 under an industrial-only scenario, and generate £8.0 million net additional GVA annually, with a cumulative £38.6 million over ten years. In the short run, construction activity will provide temporary construction employment and drive demand within the local supply chain.

- Fiscal and Wider Economic Impacts - The proposed scheme will generate an estimated £310,000 per annum in business rates, compared to £110,000 under an industrial-only scheme.

- The development would strengthen connectivity within the town centre, increasing footfall and boosting employee and visitor spending in local businesses. This is supported by research from the Centre for Cities and British Council for Offices, which states employees typically spend

between £1,300 to £1,800 per annum in their town centre. Taking a mid-point of £1,550, employment supported under the proposed scenario could support gross expenditure of £560,000 within Bury town centre each year.

- The scheme will provide new skills and training opportunities, particularly for young people and those not currently in education, employment, or training.

- Regeneration and Place-Making - The development will enhance the image and attractiveness of Bury, encouraging further investment and improving perceptions of the town. It will strengthen connectivity with the town centre, given its proximity to Bury Interchange, proposed residential developments in the Town Centre Core and will reinforce the Council's vision for vibrant, sustainable, and well-connected town centres. The development provides an opportunity to establish a market for high quality office space within the town which will hopefully lead to establishment of similar developments longer term. The presence of additional office premises within the town centre core will diversify the employment offer in Bury, making it more resilient to economic change.

- Amion justification for disposal at Less Than Best Consideration - While the disposal is at below market value for a potential industrial use, it secures a strategic occupier (Crown G&P) and delivers higher-value employment, stronger town centre linkages, and greater fiscal and economic benefits than alternative scenarios. The proposal supports inclusive growth, regeneration, and long-term value for the borough, justifying Council support for disposal at less than best consideration which could potentially be achieved.

Best Consideration under s.123 of the Local Government Act 1972

54 Local authorities have powers under the Local Government Act 1972 to dispose of land held by it '*in any manner they wish',* provided that the disposal is for the 'best consideration reasonably obtainable'. The disposal must either comply with the terms of the General Consent Order, or a specific consent to disposal will be required from the Secretary of State. Officers consider this disposal complies with the terms of the General Consent Order.

Links with the Corporate Priorities:

1. Development of the site is linked to the Local and Enterprise principles of the Let's Do It Strategy as it provides economic growth opportunities alongside the provision of additional jobs benefiting local people. The development will

provide additional business rates thus providing additional income to the council to provide essential services that serve the community.

Equality Impact and Considerations:

2. Initial EIA screening has shown this proposal will not affect people or service provision as it involves the disposal of an unused site.

Environmental Impact and Considerations:

Please provide an explanation of the Environmental impact of this decision. Please include the impact on both ***Carbon emissions*** *(contact climate@bury.gov.uk for advice) and* ***Biodiversity***

When the development scheme is brough forward it will need to comply with the requirements under planning and building regulation legislation which will include both sustainability and biodiversity criteria.

Assessment and Mitigation of Risk:

Risk / opportunity	**Mitigation**
Purchaser does not proceed with development of the office building.	Mechanism to be included within legal transfer to enable the council to take back land should the development not progress within a specified timescale.
Purchaser does not get planning permission for the office development	Early and comprehensive pre-application engagement with the planning authority to be undertaken to ensure a smooth planning application process
Biodiversity Net Gain	The development of the site crystalises the cost of Biodiversity Net Gain (BNG) across the site and mitigates any future cost uncertainty for BNG.
Legal Challenge	Expert legal opinion has been sought both on the basis of best value under the provisions of s.123 of the Local Government Act 1972 and implications of the subsidy control regime.

Legal Implications:

To be completed by the Council's Monitoring Officer.

Best Value

55 Local authorities have powers under the Local Government Act 1972 to dispose of land held by it 'in any manner they wish', provided that the disposal is for the 'best consideration reasonably obtainable' unless the authority gets consent from the Secretary of State.

Whether or not the best consideration reasonably obtainable has been obtained in these circumstances is generally evidenced by an open market, unrestricted market value. As a result of the valuation issues described above, officers have been unable to confidently confirm the open market unrestricted value of the Site, but it appears that the Site will be disposed of at an undervalue, with a maximum undervalue of £1.625m. Accordingly, the disposal must either comply with the terms of the General Consent Order, or a specific consent to disposal will be required from the Secretary of State. Officers consider that the disposal complies with the Local Government Act 1972 General Disposal Consent (England) 2003 (also known as the General Consent Order) means that the Council can make a disposal of any land interest where:

a. the Council considers that the purpose for which the land is to be disposed is likely to contribute to the achievement of the promotion or improvement of the economic, social or environmental well-being of the whole or any part of its area or of all or any persons resident or present in its area; and

b. has an undervalue of £2m of less.

Officers consider that the disposal complies with the General Consent Order because:

c. the undervalue is understood to be a maximum of £1.625m which is within that permitted by the General Consent Order; and

d. the disposal needs to meet 1 of 3 "well-being" objectives (as referenced in the General Consent Order), This proposed sale meets 2 of the objectives as the disposal with will secure,

- the promotion or improvement of economic well-being, and the
- the promotion or improvement of social well-being;

Accordingly, the disposal may be made in accordance with the General consent provisions.

Subsidy Control

56 This disposal is likely to result in the Council granting a subsidy to Crown G&P under the Subsidy Control Act 2022 as the disposal to Crown G&P appears to be at an undervalue as set our above. Prior to making the decision to award the subsidy and prior to completion of the transaction the Council must undertake an assessment of the subsidy against the Subsidy Principles

(Schedule 1 to the Subsidy Control Act 2022). It may only give the subsidy if it concludes that the subsidy is consistent with the Subsidy Principles.

Provided that, having carried out the appropriate assessment, the Council is satisfied that the subsidy is consistent with the Subsidy Principles, the subsidy can be granted and disposal completed

The award of the subsidy must be recorded on the Transparency Database within 3 months of confirmation of the decision to give the subsidy. The amount of the subsidy must be recorded on the transparency database. Given the uncertainty about the value of the subsidy, the Council will take further advice about how to record the value of the subsidy for the purposes of the database.

Legal advice in relation to any of the related terms and conditions in respect of the disposal of the land will be provided.

Financial Implications:

To be completed by the Council's Section 151 Officer.

57 The sale of the 2 plots will generate a capital receipt of £0.200m. As the sale of the plots is subject to securing planning permission, the capital receipt is expected to be received in 2026/27. The sale of the plots is assumed in the capital receipts forecast, which will need to be updated to reflect the actual value, subject to approval of this report. The contract for the sale of Plot 2 will include an overage clause, which if triggered, will result in additional income for the Council in the future.

In addition to the capital receipt, the development of the 2 plots is estimated to generate £0.310m p.a. in additional business rates

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Appendices:

Appendix 1 – CBRE 2023 Feasibility Study

Appendix 2 – Transaction Heads of Terms

Appendix 3 – Site Plan

Appendix 4 – Crown G&P Vision

Appendix 5 – Valuation Report (CBRE)

Appendix 6 - Development Appraisals (Nolan Real Estate

Appendix 7 – CBRE Clarification note

Appendix 8 – Nolan Clarification Note

Appendix 9 – Economic Analysis and Impact Assessment (Amion Consulting)

Background papers:

Please list any background documents to this report and include a hyperlink where possible.

Please include a glossary of terms, abbreviations and acronyms used in this report.

Term	Meaning
ALDP	Accelerated Land Disposal Programme
BNG	Bio-diversity Net Gain

CBRE

Chamberhall & Bradley Fold Industrial Estate, Bury

Development feasibility and strategy report for
Bury Council

December 2023

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Appendix M – Bradley Fold Cash Flow
Appendix N – Construction Market Price Commentary

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1. Executive Summary

Background

CBRE has been instructed to provide Bury City Council "the Council" with a development feasibility assessment for Chamberhall and Bradley Fold Trading Estate. Including advice around risks, constraints, viability and delivery models.

In inform the development appraisals we have commissioned surveys for both sites including: Phase 1 Ground Investigations; Flood Risk Assessments; Highways and Access Appraisals; Utility Searches; Preliminary Arboricultural Assessments; and Preliminary Ecological Appraisals, including Biodiversity Net Gain assessments.

Chamberhall is a vacant brownfield site measuring c.7.8 acres, of which the net developable area is calculated to be c.5.3 acres. The site currently generates no income for the Council and was supposed to form Phase 2 of the St Modwen led Chamberhall Business Park development, Phase 1 of which was delivered in 2020.

Bradley fold is a multi-let industrial trading estate which the council have owned freehold since 1983 and which generates c.£650k in rent, although we understand the net income to be lower as Bradley House is let on inclusive terms. Much of the accommodation is in disrepair and nearing the end of its serviceable life. Parts of the property have already been demolished providing cleared plots which could readily accommodate new development, most notably in the south west corner of the site measuring c.2.7 acres. In total we have identified c.14 acres of the site which we believe is suitable for redevelopment, which excludes the Depot and Bradley Court.

Findings & Conclusions

Both sites are considered to be suitable for development of light industrial from commercial, planning and strategic objectives. Current market conditions however are challenging, with development appraisals unable to demonstrate a viable scheme on either site. This is due to construction cost and wider cost and finance inflation along with yield compression negatively impacting investment values, ultimately impacting the price developers can pay for land and increasing uncertainty of delivery.

Development appraisals provide guidance to whether a development is viable. However, they do not always reflect the competitive advantages that some investors/developers benefit from, such as exit routes, funding or build costs. In practice, land comparable evidence often suggests a different tone. It is not until the investor/developer market actively appraises the site under competitive conditions that a true market price is determined.

In spite of current market conditions for development being challenging, there remains potential for attractive financial returns to Bury Council via different delivery routes, which carry various requirement of both resources and risk. Strong occupier demand and the success of Chamberhall Business Park suggests that the council should strongly consider a form of direct development to extract maximum benefit during relatively strong occupier market conditions due to the lack of supply.

However, Bradley Fold is more complex as the property is not vacant, therefore the important factor to consider is the cost and likely political challenges associated with obtaining vacant possession to facilitate development and the loss of income presently receivable. Nevertheless, anticipated legislative changes mean that Bradley Fold runs the risk of becoming a stranded asset if the Council do nothing, with units set to become unlettable in the medium term based on plans to increase the minimum threshold from an EPC E to EPC B in 2030, assuming the buildings lifespans can be extended until this date in light of their deteriorating condition.

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It is recommended therefore that the baseline information for Bradley Fold is improved so that a business case can be constructed for intervention, likely to be in the form of a phased redevelopment. An example 25 year model based on self-delivery (with the appointment of a Development Manager) has demonstrated that a positive financial return may be feasible over the period, which achieving a renewal of the asset which is approaching critical decision juncture.

Wider consideration should also be given to consolidation of the Depot with Bolton Council which you have outlined has been historically discussed. This may provide an end-user for any redeveloped site at Bradley Fold, effectively de-risking the redevelopment either in part or whole.

Next Steps

- Review of Bury Council land holdings to identify any potential offsetting land for biodiversity net gain obligations, particularly with regard to Chamberhall where on-site improvements are adjudged to be unfeasible.
- A drainage study for Chamberhall will be required to understand the pond's capacity to provide attenuation for proposed new development at the subject property.
- For Bradley Fold, it is recommended that intrusive ground investigation and ground penetrating radar utilities surveys are undertaken where vacant possession can be obtained; this would optimally be undertaken following demolition of the existing buildings to allow full access on subsequent phases.
- Collation and detailed review of baseline information including building backlog maintenance, condition and net rental income across the estate to start to build the business case for intervention at Bradley Fold.
- Engage with Depot (Bury and Bolton) to understand potential requirements for expansion which could provide a de-risked development option for part of the site.

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2. Introduction

CBRE has been instructed to provide Bury City Council "the Council" with a development feasibility assessment for the following sites:

a) Chamberhall (Phase 2) "Chamberhall"
b) Bradley Fold Trading Estate

As part of the instruction CBRE have been requested to set out a potential route to market and outline appropriate delivery models. The Council is seeking to support their wider objective of increasing and sustaining economic growth by supporting existing and new businesses in the borough.

Background and Context

Chamberhall and Bradley Fold Trading Estate are both Bury Council owned commercial sites located within the borough. Both sites are in locations which suggest new/additional light industrial development would be appropriate and this has been tested during this commission. Whilst investment values for industrial units are currently in a period of decline due to increasing build costs and yield increases, there remains significant demand for new build industrial accommodation in the North West, which is creating opportunities for increased rental growth when compared to long term trends.

Chamberhall is a vacant cleared brownfield site and currently generates no revenue to the council. The central part of the site consists of a sustainable drainage system (SuDS) in the form a pond with the surround area being grassland, self-seeded shrubbery and trees of various maturity. It was previously allocated as Phase 2 Chamberhall under the agreement with St Modwen, but was not delivered pursuant to the completion of Phase 1 in 2020.

Bradley Fold Trading Estate comprises a multi-let industrial estate with predominantly aged buildings at or beyond their reasonable lifespan, as well as being home to the borough's principal depot. A small mid-2000s built pair of light industrial terraces is also included to the north eastern part of the site. The aged units are typically let on low rents with limited tenant repairing liabilities having regard to the poor condition of the buildings. This means that the Council have significant repair and maintenance liabilities for the site and relatively limited income from occupiers to generate a revenue surplus to meet the Council's investment asset objectives. This creates an opportunity for redevelopment that can enhance the value of the Property as an occupied asset by increasing revenue.

Both Chamberhall and Bradley Fold Trading Estate are therefore each being considered as opportunities for development; this report investigates the risks (via undertaking of technical due diligence including surveys) and opportunities (via market insight together with architectural and viability assessments) to determine the feasibility of bringing forward delivery on each site.

To inform the feasibility review which is presented in the following property sub-reports, we have been provided with the following documents by the Council:

- Bids for Chamberhall site
- Historic surveys (both sites)
- Bradley Fold Trading Estate tenancy schedule

Please note that the figures provided in this document do not constitute a Red Book Valuation and are indicative pricing estimates based on agent's opinions of price and marketability. The figures are not to be relied upon by any third parties without written consent.

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3. Chamberhall

Location

Chamberhall Business Park Phase 2 'the site' (shown on the plan below) is located a short distance north of the town centre. The A56 Peel Way is accessed via Harvard Road, c.175m to the south, which in turns provides access to Bolton c.5 miles to the west and Junction 2 of the M66 motorway, c.2 miles to the east (via the A58). The M66 connects with the Junction 18 of the M60 motorway c.3.3 miles to the south, providing access across Greater Manchester and connects to the M61 towards Lancashire; and is also the start of the M62 motorway which routes to West Yorkshire to the east. The property therefore benefits from excellent road connections.

Bury Interchange lies approximately 600m to the south of the site and is a 13 minute walk, providing frequent Metrolink services to Manchester City Centre every 6 minutes, as well as being home to Bury's bus station. Regular bus services from Bury Interchange run to Manchester, Bolton, Rochdale, Ramsbottom and Heywood.

The property is shown by the red circle on the aerial photo below.

Chamberhall forms part of a wider commercial location which includes a mix of uses with the with Bury Divisional Police Headquarters situated immediately to the south on Dunster Road and Bury Community Fire Station to the north on Magdalene Road alongside a variety of predominantly light industrial occupiers including the recently built Chamberhall Business Park developments to the north and west/southwest, as well as older stock including the William Hare Group to the east and the wider Peel Mills Industrial Estate to the north east.

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The below map highlights the situation of the site within the local area.

Key

- Site
- Current use
- Proposed use

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The Property

The property comprises a previously cleared plot of land which has since become overgrown with grassland, self-seeded shrubbery and trees of various maturity. There is a sustainable drainage system (SuDS) in the form a pond at the centre of the property. The pond covers an area of c.1 acres with the total property area being c.7.8 acres. The developable area is c. 5.27 acres, constrained by both the attenuation pond and the need to retain access to the pond's periphery for read clearance and dredging.

The earliest mapping dated 1849 indicates the site was occupied by two reservoirs which expanded to include sluices, aqueducts and intake chambers in c.1937. The largest of the two reservoirs (in the west of the site) was infilled in c.1978 to 1983 and the remaining small Reservoir reclassified as a Pond. It is noted from 2019 aerial photography that widespread earthworks was undertaken on the site believed to be related to the redevelopment of the neighbouring Phase 1 business park.

The surface water storage for the Phase 1 development was designed to be attenuated in the attenuation pond located on the subject property. The pond was engineered to allow collection, attenuation and discharge of surface water flows into the River Irwell. A drainage study will be required to understand the pond's capacity to provide attenuation for proposed new development at the subject property.

The below red lined image shows the extent of the property with the developable area shaded in blue.

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Photographs taken on our inspection are included below.

Background

The property was to form phase 2 of St. Modwen's light industrial development at Chamberhall Business Park, however the second phase was never brought forward. The first phase of the development sits to the north of the property and consists of c.120,000 sq ft of light industrial space, completed in 2020.

The Council conducted a marketing process in November 2021 inviting bids for the long leasehold disposal of the site (250 year lease) with the ambition of development of light industrial scheme being delivered. Bids were received from the Barnfield Group, Hargreaves Land Limited, Maple Grove Developments, Red Sun Projects Limited and Seddons Development Limited. The bids reflected a land prince ranging between £100k and £2.75m equating to between £12.8k and £353k per acre (net developable). An overview of the bids can be found at Appendix A.

Surveys

As part of this instruction, technical due diligence has been undertaken including the commissioning of the following surveys:

- Topographical Survey
- Phase 1 Ground Investigation (and Phase 2 GI review)
- Flood Risk Assessment
- Highways and Access Appraisal
- Utilities Search Report
- Preliminary Arboricultural Assessment
- Preliminary Ecological Appraisal
- Biodiversity Net Gain

Full copies of the surveys can be found at Appendix B.

Phase 1 Ground Investigation (and Phase 2 GI review)

The Phase 1 Desk Study was completed by Civic Earth Limited with the aim of assessing potential human health, environmental and geotechnical risk and constraints associated with the proposed development. The key findings of this report as summarised below.

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There is generally a moderate risk to identified receptors from potential contaminants associated with the current and former uses of the site and surrounding area and potential made ground associated with the former development of the site and potential infilling of surface water features. In addition, there are a number of potential geotechnical constraints associated with the potential for below ground obstructions, infilled surface water features on site, variable thickness of Made Ground associated with the development history of the site and potential variability of the underlying superficial deposits.

The site is also located within an area of low risk from unexploded ordnance and it is therefore recommended that pre-desk study assessment is undertaken to conform whether any other military activity may have occurred at the site.

It was recommended that a detailed review should be undertaken on the available site investigation data and risk assessments for the site. Once this is completed, it was recommended that an intrusive ground investigation be undertaken to assess for the identified contaminants of concern and enable a remediation strategy to be developed, if required. In addition, the ground investigation should be designed to evaluate the potential geotechnical risks associated with potential development and inform the geotechnical design.

As part of the due diligence undertaken for the Phase 1 Ground Investigation previous studies in the locality were analysed. A Phase 2 site investigation, undertaken by Atkins on behalf of St Modwens was completed in 2015 for the site boundary. The review of the information included in this report was presented in an addendum to the Phase 1 Investigation included in this instruction. A copy of the review is included at Appendix B.

Key findings of the study for consideration are;

Made Ground

- Across the site made ground as found in varying quantities, in line with the findings as part of the Phase 1 and previous use of the site. The maximum depth this was found was 7.5m, where previous a reservoir was sited. This would inform the foundation strategy on the site or alternatively ground remediation would be recommended. A strategy would be required as part of early design development of the site.

Gas Risk

- The southern portion of the site was found to have potential for ground gas. Remediation was recommended as part of these findings.

The opportunity to avoid a second intrusive Ground Investigation has been progressed. Reliance on the previous study will reduce the scope of investigation to a shallow study, understanding localised ground movement made since 2015. Discussion is ongoing with St Modwen on their acceptance of reliance. If this is not provided the information provided to date still allows for the feasibility assessment of the site. If the development of the site progresses, as a consequence of the made ground, localised investigation beneath structures would be required to inform detailed foundation design.

Flood Risk Assessment

The Flood Risk Assessment was completed by Civic Engineers with a site walkover being carried out on the 9th October 2023. The summary of the findings are set out below.

The site is at low risk of flooding from rivers or sea. There is a low risk of surface water flooding with the area at risk focused around the existing pond. It was recommended that a detailed flood risk assessment should be undertaken to support any planning application which should include an assessment of flood risk from the River Irwell.

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In order to understand whether the existing pond has capacity to accommodate surface water flows from the development site it was recommended that a detailed assessment of the existing site drainage infrastructure should be undertaken. It was also recommended that existing drains and sewers within the site boundary should be considered when development proposals for the site are progressed.

Subject to the above recommended additional surveys, given the majority of the site (bar the pond) is in a flood zone 1, all types of development should be compatible from a flood risk perspective.

Highways and Access Appraisal

Civic Engineers provided a high-level review of the highways appraisal and the four roads on the periphery and their suitability for new vehicle access.

The report notes pedestrian access can be achieved from all boundaries of the property. Cyclists can access the site from Harvard Road and Castlecroft Road and the nearest bus stop is a 7 minute walk from the property. Several highly feasible access points (no constraints) for vehicles were noted on the west side of the property (Harvard Road) and north of the property (Magdalene Road). The architect should now be able to utilise the suggested access points for their feasibility studies.

The report additionally notes areas for consideration for the full planning application as follows:

1. Trip Generation based on forecasted sqm for each land use and an assessment of the need for junctions' assessments or trips distribution accordingly.
2. Cycle and Car Parking Quantum Provision in line with Bury's requirements.
3. Recommendation on minimum 5% of cycle parking to be wider spaced for disabled cyclists and at least 15% single racks.
4. Pool electric bikes and car clubs could be provided to encourage sustainable travel.
5. Review servicing strategy and fire access. Provision of loading/servicing bay will be required given loading restrictions on kerbside. Location of collection point to consider distance from proposed refuse store to avoid a managed solution (i.e., need for developer to carry bins).
6. EV charging provision to be according to Part S4 regulation.
7. Swept Path Analysis of vehicle movements on proposed layout and accesses to confirm geometry.
8. Confirmation on need of a Travel Plan update (given a Transport assessment and Framework Travel plan were produced for the earlier outline planning application, reference 63185).

Utility Search Report

Amethyst Surveys Limited undertook a utility search report on 16th November 2023. There is a limited amount of utilities relating to gas, water, electricity tracking the periphery of the site. There is a public sewer crossing part of east/south east part of the site. There are no internet lines on the site.

Care will need to be taken when developing proposals however it is unlikely that the limited amount of underground utilities will need to be relocated. Any such relocation will of course carry a cost and therefore potentially pose a risk to development viability.

Cost estimates for any required relocations should be obtained once development proposals have progressed to an appropriate level however given the limited amount of underground utilities on site, no relocation/diversion costs have been included in our appraisals at this stage.

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Preliminary Arboricultural Assessment

Middlemarch provided an arboricultural assessment which surveyed the trees on site to aid design and avoid unnecessary tree removal.

Trees were assessed and assigned a category of either U, A, B or C which related to the quality and life expectancy of the trees. The trees recorded on site were predominantly low-quality self-set specimens which situation in clusters across the site. None of the trees are subject to a tree preservation order, nor are they in a conservation area or considered as ancient woodland.

A number of key recommendations were made as follows:

- The retention of Category B trees across the site should be considered a priority.
- The retention of Category C trees across the site should be considered where possible.
- Where required by the Local Authority a Capital Asset Valuation of Amenity Trees assessment should be undertaken to attribute the monetary value for each tree.
- All new development should be located outside of the root protection areas or canopy spread of any retained tree.
- Any proposed new planting should consist of a mix of ornamental, native and wildlife attracting species.
- An updated preliminary arboricultural assessment is recommended after a period of 12 months from the date of this assessment.
- If works take place during the bird breeding season, usually from March to September inclusive, trees should be checked for nesting birds.

More generally it was advised that the removal of trees across the site should be minimised and new tree planting should be provided to adequately mitigate any essential tree loss.

Preliminary Ecological Appraisal

An assessment was undertaken by Middlemarch to ascertain the potential ecological constraints and opportunities associated with future redevelopment works at the site.

The report noted various protected/notable species within close proximity to the site as well as the extent and ecological condition of the various habitats on site (e.g. Marshy grassland, broadleaved plantation woodland). Local priority species (including bats and great crested newts) should be considered in the development of any future proposals to ensure habitat areas make a positive contribution toward these target species.

Additional surveys have been recommended in order to determine the status of protected/notable species on site and the extent they are likely to be affected by any future development as follows:

- Great Crested Newt Habitat Suitability Index Assessment and eDNA analysis of the onsite pond;
- Botanical Survey (with a focus on marshy grassland habitat);
- Bat Surveys (scope dependent on agreed quantum of development);
- Reptile Survey; and,
- Invertebrate Habitat Assessment.

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It is recommended that these surveys are only commissioned once a clear route forward has been selected and development programmed, due to their limited period of validity.

Biodiversity Net Gain

In accordance with the principles of the Environment Act 2021 and the Biodiversity Gain Requirements (Irreplaceable Habitat) Regulations 2024, all development from January 2024 is required to secure an overall biodiversity net gain (BNG) of 10%. Middlemarch undertook a habitat survey and condition assessment to determine the total Habitat Baseline for the site which has a value of 25.79 biodiversity units (BU). The key component of the Habitat Baseline score is the 'marshy grassland' which equates to a BU value of 16 as shown in the below table.

Phase 1 Habitat	Metric Equivalent	Area (ha)	Description (distinctiveness, condition and strategic significance)	Value (BU)
Broadleaved plantation woodland	Other woodland: broadleaved	0.12	Medium distinctiveness. Poor condition. High strategic significance due to location within a 'Tree Planting Opportunity Area'.	0.55
Dense scrub	Mixed scrub	0.49	Medium distinctiveness. Moderate condition. Low strategic significance.	3.92
Marshy grassland	Other neutral grassland	2.00	Medium distinctiveness. Moderate condition. Low strategic significance.	16.00
Poor semi-improved grassland	Other neutral grassland	0.12	Medium distinctiveness. Poor condition. Low strategic significance.	0.48
Standing water	Ponds (priority habitat)	0.43	High distinctiveness. Poor condition. Low strategic significance.	2.58
Scattered trees (4 x large trees)	Urban tree	0.15	Medium distinctiveness. Good condition. High strategic significance due to location within a 'Tree Planting Opportunity Area'.	2.07
Scattered trees (4 x small trees)	Urban trees	0.02	Medium distinctiveness. Moderate condition. High strategic significance due to location within a 'Tree Planting Opportunity Area'.	0.18
Scattered scrub	N/A	N/A	N/A	-
Total Area (ha)		**3.33**	**Total Habitat Baseline (BU)**	**25.79**
Total Area (excluding area of individual trees)		**3.16**		

Source: Chamberhall PEA

A further assessment has also been undertaken based on the indicative schemes, which each have a score in the order of 14.4 BU to satisfy the 10% net gain obligation. This is notably lower than whole site baseline due to the restricted (therefore smaller) development area, as well as the design brief seeking to target minimum intervention e.g. retention of Cat B trees and as a consequence the associated BU. The pond and woodland were assessed as

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being in 'poor' condition and as such provide an opportunity for on-site enhancement. Furthermore, the development boundary incorporates areas of 'green space', measured at close to 1.3 acres overall in both the indicative schemes, providing a potential opportunity for some on-site enhancement.

The part of the site which is constrained and as such deemed not suitable for development measures c.1.6 acres (excluding the pond) but is predominantly graded as 'moderate' condition and is therefore understood to not be cost effective to upgrade i.e. it is cheaper to purchase off-site credits than to seek to enhance the existing biodiversity as enhancing grass above moderate can be challenging and would provide limited step change potential.

Overall therefore, there will be a BU loss arising from development, in addition to the biodiversity net gain obligation of 10%, the combined total of which is c.14.4 BU which will need to be replaced via an off-site contribution. There are three main offsetting options available:

1) **Invest to enhance land held by Bury Council** - generate an uplift in BU equivalent to the off-setting requirement. Identifying potentially suitable land is key, with low quality land providing the biggest opportunity for step change via enhancement. The cost of managing the habitat for the minimum 30 year period would also need to be calculated in addition to the initial investment to upgrade land.

2) **Purchase market credits** – pricing varies between providers but current average is £35k per unit, which would equate to c.£500k based on the indicative development scheme.

3) **Purchase via statutory biodiversity credits scheme** – this is deemed to be the 'last resort' option as it is the most expensive at c.£1+million based on current indicative prices published by Defra.

Option 2 above assumes that an offsetting solution could be found with the local authority boundary. If this is not possible then a 'spatial risk multiplier' is applied to credits purchased via the market, requiring a greater number of units to be purchased with increased distance from the site. In practice, the multiplier discounts the value of the units purchased in neighbouring boroughs or National Character Areas by approximately 25%, increasing to c.50% discount for projects further afield; meaning that a developer would have to purchase an additional 25 – 50% of their unit requirement from the offset provider to make up for the spatial discount.

Whilst Option 1 may provide the lowest cost solution for BNG offsetting, until a land review is undertaken it is not possible to estimate the potential costs of this solution. For the purposes of this study therefore, we have assumed the council will purchase market credits under scenario 2 and have therefore included a cost of £500k within our appraisals for BNG. As above, this is based on credits being purchased 'in borough' i.e. not subject to a spatial risk multiplier.

Finally, in considering how to manage the site in the meantime, it is judged unlikely that the BU will increase significantly on the site having regard to the majority of the current habitat condition being graded as 'moderate'. The Environment Act provides that highest recorded score is applicable for determining the BNG requirements, therefore seeking to clear or manage the site in any way with the outcome (intentional or otherwise) of reducing the BNG liability is not advised without first seeking further specialist advice regarding any potential implications.

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Planning

A comprehensive desktop planning appraisal has been undertaken for the site to identify the opportunities and constraints associated with the future development of the site from a planning perspective. A copy of the appraisal is included in full at Appendix C, with key points set out below.

Chamberhall Planning History

A review of the planning history confirms that the water course and associated Sustainable Drainage System (SuDs) was restored and constructed by Bury Council in 2008/09 in response to the flood risk and drainage challenges of the wider Chamberhall site to enable the land to come forward for development. At the time, the site fell within Flood Zone 2 and 3 and as such, parts of the site were at risk of flooding (1 in 100 year event). The development therefore restored and retained the existing pond feature, using this as a surface water attenuation facility. Given the importance of the attenuation pond for the site-wide drainage strategy, and to mitigate against flood risk, this will need to be maintained as part of any future development coming forward on the site.

Two applications (ref. 47422; 51242) for associated road networks in relation to Harvard Road, Castlecroft Road, Dunster Road and Magdalene Road have also been approved to deliver access to and from the site.

A hybrid application for Chamberhall Business Park (ref. 63185) was approved in 2019, proposing business and light industrial uses in accordance with an approved masterplan (Figure 7). The application states that the design principles of development will incorporate new artwork to create a new component of the Irwell Sculpture Trail. Phase 1 of the wider masterplan has now been built out and was completed in 2020 by St Modwen Developments.

Outline planning permission was secured for a further two phases comprising Phase 1A to the north west of the appraisal site, and Phase 2 which covers the appraisal site itself. The uses approved as part of the outline permission for the appraisal site are identified as Use Classes A1, A3, A4, A5, B1, B2, B8, C1 (hotel), D1 (creche) and D2 (gym). It should be noted that the Use Classes Order has been amended since the grant of planning permission.

Condition 42 of this hybrid planning permission stipulates that applications for approval of reserved matters must be made not later than five years from the grant of planning consent. The Decision Notice was issued on 7th February 2019, meaning an application for reserved matters must be brought by 7th February 2024.

Planning Policy

The site forms part of the wider Bury Ground Opportunity Site which is allocated in the Unitary Development Plan (UDP) for employment, business, offices and hotel/conference facilities (Policy EC1/3/2; Policy RT4/3/2). Under these aligned policies, the Council confirms the site's suitability for B1 uses, as well as having the potential to include a hotel or conferencing facility, providing that the following criteria are adhered to:

a) uses will be limited to business (B1), offices or hotel/conference facilities;

b) due to the prominent position of the site any development shall be of a high standard of design and should attempt to minimise its effect on the character of the Irwell Valley by careful attention to siting, design, layout, materials and landscape design;

c) the open character of the site and the existing network of footpaths should be retained in a low density development;

d) access to the riverside area should be maintained, and the existing river frontage remain intact or be improved;

e) the showground site should be retained;

f) the existing water area should be retained as a natural feature;

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g) access to the site will have to be provided to the satisfaction of the local planning authority;

h) proposals should have regard to any development brief subsequently issued by the Council. Any such development brief will be issued solely for the guidance and assistance of planning applicants and will be consistent with the Plan.

As such, the attenuation pond would need to be retained as part of any development of the site, along with ensuring high quality design and access to the River Irwell to be maintained. Whilst this Policy references the retention of the showground site, this has since been developed on and forms part of the Police Headquarters site.

The adopted policy also references a development brief. CBRE has not been made aware of this document by Bury Council as part of this project.

Conclusion

The use of the site for employment development is considered to be acceptable in planning terms, subject to a proposal which complies with the policies in the development plan. The Places for Everyone Joint Development Plan and the emerging Bury Local Plan will need to be considered depending on the timescales of development.

It is broadly considered that the site has the potential to be considered for visitor accommodation and conference facilities, as part of development alongside other employment uses. Given the existence of predominantly employment uses within the area and the absence of planning policy and guidance on other uses, it is difficult to assess the specific parameters which might be acceptable for other uses. Developments which have been permitted in the vicinity tend to be of a similar occupancy being of light industrial and employment, therefore it is likely to be considered acceptable to propose that of a similar development type.

Any proposed development would have to demonstrate consideration of the issues identified above, specifically in relation to the attenuation pond and its link to flood risk in the area.

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Development Constraints & Opportunities

The key constraints relating to development are the BNG requirements and associated off-setting costs; the SuDS pond and required maintenance access restricting the net developable area; made ground requiring piled foundations; and the presence of subterranean sewers.

These and further considerations are highlighted in the development constraints and opportunities assessment shown below which is also included in full size format at Appendix D.

Opportunities	Constraints
1. Direct access to the A58 and A56.	1. Majority of the site is marshy grassland, BNG credits to be considered.
2. West side of the site is relatively level and therefore maybe suitable for development.	2. Category B trees may need to be retained (blue shade).
3. Multiple 'highly feasible' new highways access points to the site.	3. Category C trees may need to be retained (yellow shade).
4. Successful phase 1 adjacent to the property demonstrating demand.	4. Man made pond on site will make achieving an efficient site coverage challenging.
	5. Site levels drop significantly towards the pond.
	6. Surface water sewer to outfall into pond.
	7. Surface water sewer from pond to river.
	8. Capacity of the pond to accommodate surface water flows from the development should be assessed via a detailed assessment of the existing site drainage infrastructure during the development of site proposals.
	9. Area required for maintenance of the SuDS (Orange boundary)
	10. Easement to combined sewer (dotted purple line).
	11. Access to fire station down Magdalene Road will need to be maintained whilst works ongoing.
	12. Below green line considered too steep for access points for future dredging/reed clearance
	13. Pond is in flood zone 2, detailed flood risk assessment required.
	14. Majority of the site will require piling due to made ground.
	15. Potential contamination from historic uses – boreholes found limited asbestos.
	16. Himalayan Balsam – invasive species.

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Scale and Massing Assessment

Based on the planning considerations outlined above and our understanding and research regarding the development and occupier markets in the area, we consider the most deliverable use on the site would be light industrial focused scheme. This is underpinned by the recent success of Phase 1 Chamberhall Business Park.

Based on the conclusions of the Market Overview (Appendix E) the designs were informed by recommended unit sizes ranging between 2,000 to 30,000 sq ft.

To demonstrate the outcomes and returns from such a potential development, two light industrial schemes have been developed, costed and appraised as follows:

Option A - high proportion of small units to target council aspirations for high provision of employment; and

Option B - higher proportion of larger units which would represent a more typical developer scheme targeting fewer, larger occupiers (covenant) / design & build opportunities.

Each scheme option has been designed to allow for maximum flexibility of unit configuration and sizes whilst addressing the site constraints as highlighted above.

Copies of the two options are shown below and are also included in full size format at Appendix F.

Option A

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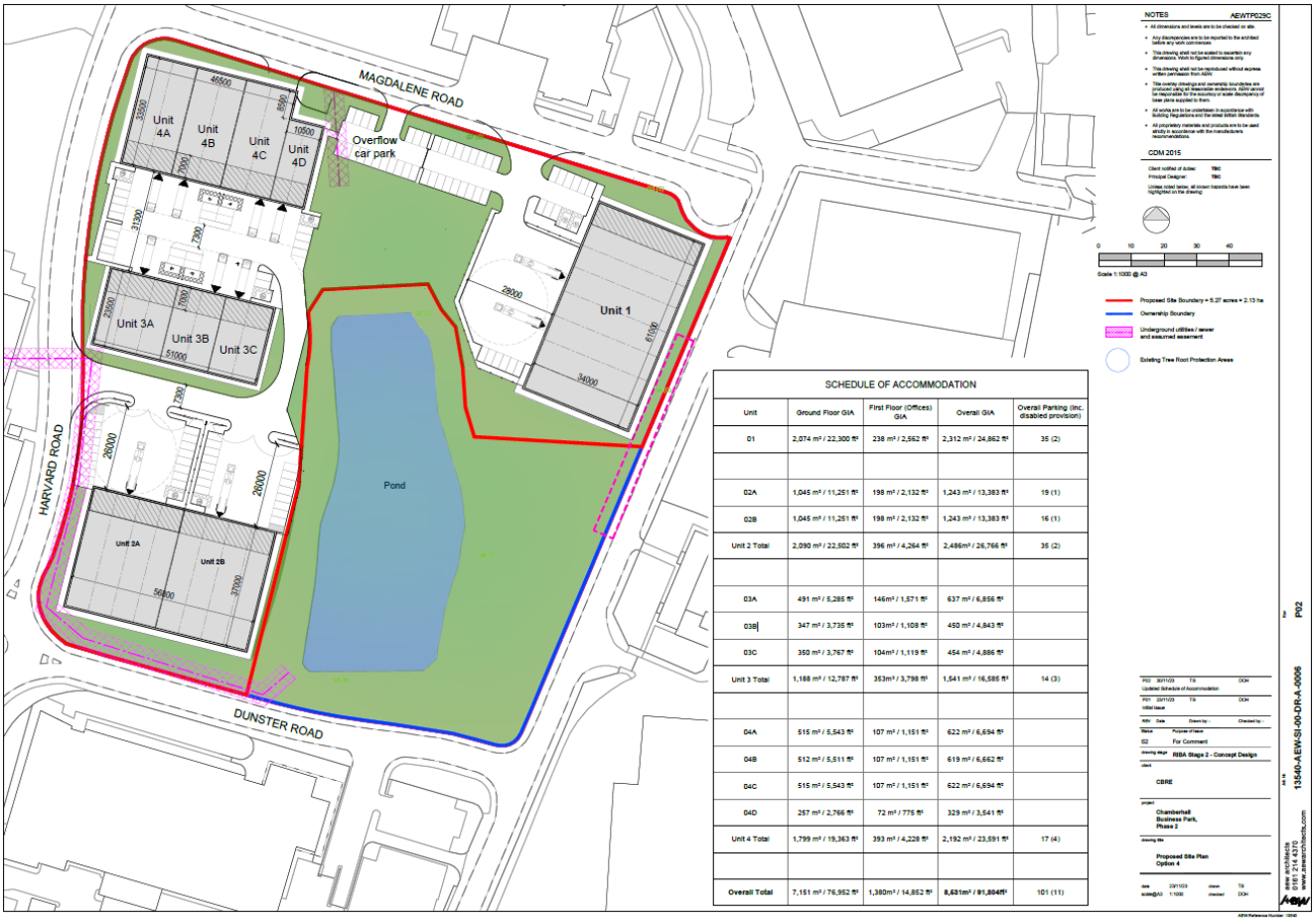
Option B



The two indicative scheme options provide the following accommodation:

	Option A		Option B	
	Total sq ft	**Unit Sizes sq ft**	**Total sq ft**	**Unit Sizes sq ft**
Unit 1	24,862	24,862	24,862	24,862
Unit 2	20,916	1,494	26,766	13,383
Unit 3	35,475	3,537 – 5,373	16,585	4,843 – 6,856
Unit 4	N/A	N/A	23,591	3,541 – 6,694
Total	**81,253**		**91,804**	

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Development Appraisal

The following table summarises the appraisal inputs and outputs for each concept development option to illustrate the comparative cost and returns of the varying approaches to target unit sizes. A full copy of the appraisals is included at Appendix G. Costs plans are included at Appendix H.

Option	Floor Area (sq ft)	Projected Rent (£pa)	Projected Business Rates	Net Development Value	Development Costs	Profit (Deficit)	Land Value (Deficit)	Development Yield
Option A Traditional	81,253	£950,000	£185,000 to £246,000*	£13.00m	£15.80m	£2.10m	(£4.85m)	5.25%**
Option A Development Manager	81,253	£950,000	£185,000 to £246,000*	£13.00m	£15.80m	(£2.75m)	£1	6.00%
Option B Traditional	91,804	£1,050,000	£280,000	£14.65m	£16.15m	£2.10m	(£3.60m)	5.70%**
Option B Development Manager	91,804	£1,050,000	£280,000	£14.65m	£15.40m	(£750,000)	£1	6.75%

* Note the range reflects the fact there a number of smaller units that may benefit from SBRR.
** Assumes Developer Profit as 'Cost' for calculation of Development Yield

The recent outwards shift in yields for good secondary locations from c.4.75% in September 2022 to c.6.5% in December 2023 in conjunction with rising build costs has led to a sharp fall in land values. CBRE projects yields will return closer to the previous five year average of 5.5% from 2025 onwards, which could equate to between 75 basis points (bps) and 100 bps improvement on present yields.

In summary and assuming all other inputs remained constant, a 50-100bps hardening of the yield to move in line with the 5 year average would provide a financial surplus of between £400k and £1.8m on the option B DM model, versus the current shortfall of £750k being illustrated, demonstrating the true impact of recent yield shifts on development.

Delivery Options

Based on the above outlined review of the development opportunities and constraints, including statutory and market assessments, we consider that there is an opportunity to deliver a light industrial redevelopment on the site.

Following the due diligence undertaken, the principal development constraints which have been identified which could prevent development or add significant abnormal cost include ground conditions (made ground and historic industrial uses) and anticipated BNG requirements (high Habitat Baseline score).

Delivery of a commercial development would help meet the Council's aspirations to improve the quality of its employment land offer and create new employment opportunities within the borough. If the site was developed for light industrial - assessed to be the most appropriate development end-use - it could potentially generate an income of over £1,000,000 pa and business rates of c. £185,000 to £280,000 pa depending on the preferred scheme and on whether SBRR are applicable on some of the smaller units.

Alternatively, there could be potential 'special purchasers' such as local occupiers, which may provide either alternative uses on 'sub-plot' basis or enhanced/de-risked development routes.

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In assessing the development potential of the site we have considered two varying schemes of light industrial to illustrate an optimised option for:

A) targeting development yield and council aspirations for provision of a employment opportunities via larger number of smaller units; and

B) investment return focused scheme targeting lower risk returns i.e. larger units where covenants would typically be superior and asset management intensity lower / design & build opportunities.

Subject to the preferred route forward, the Council have a number of commercial delivery options available to consider which are outlined in the following table:

Delivery Route	Returns	Commentary
Direct Freehold/Long Lease Sale	Potential price based on whole site assuming high density industrial scheme (c.90k sq ft) is presently negatived based on a residual appraisal model.	Would be sold to a developer or occupier on a subject to planning basis. Current market conditions provide a high risk for Bury Council of non-delivery/satisfaction of conditions. Provides limited control over the future development although some control could be secured by using a development licence/lease or the use of leasehold covenants. No future revenue return.
Sale of Long Lease	Could provide both an initial capital payment and ongoing annual 'ground rent'. The combination of the capital payment and ground rent would most likely target the 'land price' but current market conditions are challenging. Typical ground rents can be based on the rental value of the land where there is no capital payment, but the agreement would be specific to the end development and user.	The ground rent provides Bury Council with a long term income stream with either a lower or no capital payment. However, many occupier and developers will be deterred by this structure as they target freehold/long lease opportunities without ground rent due to the requirement of their funders.
Joint Venture	Joint venture returns vary significantly depending upon the inputs of the partners but Bury Council could seek a share of the development profit if the units were developed and then sold.	A joint venture could reduce the risk and resource requirements to Bury Council as the partner could bring their own capital and skills. However, the need for an 'exit position' would potentially reduce the possibility of Bury Council holding the scheme as an investment in the future should this strategy be preferred. A procurement process would be required and the scale of the opportunity means that this approach is unlikely to attract strong interest from the market and therefore is not recommended.

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		An investment partner could circumvent procurement requirements for specialist DM services, whilst providing a funding solution for a share of the returns.
Direct Delivery	The estimated returns from the optimal option B suggest a development yield of c.7% if the land price is excluded (as Bury Council own the FH). This development yields is slightly ahead of the cost of purchasing equivalent investment property but not significantly enough to be attractive at this time. If Bury Council were to develop units directly for occupiers, the returns would be the land prices and the development profit the agreement would derive.	In this case, Bury Council would assume the role of lead client and financer of the scheme. The development may be managed internally or externally (via appointment of a Development Manager). The exit route could either be to hold the asset as an investment upon completion or sell it. Alternatively, units could be developed for specific end purchasers and Bury Council would benefit from a land payment and development profit.

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Conclusions

The site is located in an established commercial location, with good road connections and adjacent to recently developed light industrial units which are well occupied, demonstrating the strengths of the location and supporting the potential for delivery of further light industrial accommodation.

There are a number of challenges when considering redevelopment of the site, not least the presence of the attenuation pond and in and outflows which restricts the net developable area. The site also has a high Habitat Baseline score which adds cost and uncertainty to development from the requirement, effective from January 2024, for BNG offsetting. Estimated costs of between £500k - £1m+ have been identified, subject to which offsetting route is adopted.

The BNG offsetting requirement could potentially be satisfied directly by the council for a lower cost, via investment to upgrade land held elsewhere within the borough on land owned by the council. This is subject to an assessment of availability of potentially suitable land, but a developer (via land sale approach) would likely have higher offsetting costs (credits vs potential to upgrade existing land holding). Should credits not be available within the borough, more credits would be required and higher costs therefore applicable to development, creating further uncertainty for prospective bidders should the site be brought to market as a development opportunity again.

Our appraisal of the site has concluded that there is potential to deliver c.80,000 – 90,000 sq ft of light industrial accommodation on the site which could create between 160 and 180 new jobs (based on government issued employment density guidelines) and generate between approximately £185,000 to £280,000 pa of business rates.

Development conditions for the traditional developer model (build and sell) are currently challenging, principally as a result of construction cost and wider cost and finance inflation as well as yield compression negatively impacting investment values, ultimately impacting the price developers can pay for land and increasing uncertainty of delivery. Strong occupier demand and the success of Chamberhall Business Park suggests however that the council should give consideration to a form of direct development to extract maximum benefit during relatively strong occupier market conditions.

Optimised returns for the council are most likely to be achieved from Direct Delivery, within which there is a sub-option of either internal led delivery or an appointment of a third party specialist via a development management agreement. The council would take full risk exposure for delivery; however this is the cost to take advantage of a full profit share and, in current market conditions, is likely to provide the most assured route to delivery.

It is our understanding that the council does not possess the internal resources to deliver directly, therefore appointment of a development manager is likely to provide an appropriate option for further consideration. A development manager would require a fee (typically in the region of 4-5% of development costs) but would bring the required resource and expertise which the council presently lacks.

The configuration of Chamberhall provides an opportunity for agreements to be reached on a land sale to private sector developer or occupiers directly, the latter likely on a plot basis. Our testing of the site has highlighted that the configuration lends itself to plot developments and as such design & build opportunities may provide the council with a lower risk exit (retain control on delivery and wouldn't speculatively build).

The Council has of course followed the land sale route previously, with agreement with Hargreaves Land ultimately falling away which we understand was cited by the developer to be due to increasing construction costs and viability challenges. In current market conditions (continued inflation, construction costs and yield suppression) we consider that a land sale approach is unlikely to yield favourable outcome/returns for the council; that is to say there would be a moderate risk of non-delivery and land values would likely be lower than received during the marketing undertaken in 2021.

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Looking forward, CBRE projects that from 2025 onwards light industrial yields will show signs of recovery, whilst construction costs are currently showing signs of levelling off. Additionally, the lack of new-build/quality supply being brough to market means that rents are predicted to continue to grow in the sector where demand is strong. We therefore expect conditions for development to improve in the coming years.

Ultimately, current unfavourable market conditions, together with the BNG cost uncertainty, mean that a hybrid of the above approaches may provide the optimal route forward, whereby 'plot(s)' are marketed on the basis of design & build and any remaining plots could then be delivered speculatively at an appropriate time i.e. when the market improves.

Alternatively, the council could continue to progress through the design RIBA stages until critical milestone decisions such as planning or funding, to create a developable proposition which could either be progressed or sold at the appropriate time when market conditions are more favourable and greater certainty is available regarding the potential offsetting BNG costs.

The incentive for a counter-cyclical direct delivery by the council can be made on the basis of the strong occupier market and limited delivery of new development being brought forward by the private sector, meaning there would be limited supply competing for occupiers.

On a build and hold model, the negative land value does not have to be crystalised and instead the council would retain an income generating asset whereby the income would pay off development debt as well as generating a surplus investment income (alongside new jobs and business rates generation), until such a point a sale may be adjudged appropriate to release capital if required.

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Heads of Terms

In relation to

Sale of land at

Chamberhall Business Park
Harvard Road
Bury
BL9 0JU

December 2025

1.0 Parties	
Vendor	Bury Council Knowsley Place Knowsley Street Bury BL9 0SW
Contact	Roger Frith (Assistant Director of Corporate Assets and Facilities Management)
Purchaser / Occupier / Developer	Crown Gas and Power Limited The Oil Centre Bury New Road Heap Bridge Bury BL9 7HY Company Number: 07980591

2.0 ADVISORS	
Vendor Solicitors	Browne Jacobson 3rd Floor No 1 Spinningfields 1 Hardman Street Manchester M3 3EB
Purchaser / Occupier / Developer Solicitors	BBS Law Ltd First Floor The Edge Clowes Street Manchester M3 5NA

3.0 Transaction Details	
Property	Land at Chamberhall Business Park Harvard Road Bury BL9 0JY
Overview	The vendor has agreed to sell the property edged red on the attached plan by way of a freehold sale (Parcels 1 & 2). The land sale is conditional on the parties entering a conditional contract for the purchaser to facilitate delivery of a minimum 39,000 sq ft of office space on Parcel 1. Parcel 2 will also be transferred simultaneously.
Purchase Price	Parcel 1 -£1 (One Pound) Parcel 2 - £200,000 (Two Hundred Thousand pounds) will be payable on completion following the grant of planning permission for the Parcel 1 Office development as above.
Deposit	A 10% deposit will be paid on exchange of contracts
Conditions	The purchaser to assume all responsibility for delivery of the Parcel 1 scheme including all planning obligations (including BNG)
Planning Application	The purchaser to submit a planning application within 6 months of exchange of contracts.
Council Control Mechanism	• The Council will have the option to buy back the land, if works have not substantially commenced within 12 months from receipt of implementable planning permission. • The Council will have the option to buy back the land at market value if the scheme (Parcel 1) has commenced, but is not completed within 36 months from commencement of the works. • The dates for the exercise of the options can be extended by mutual agreement between the parties due to a force majeure event.
Overage	There is to be an overage provision on Parcel 2 for any development with an uplift in land value above the purchase price. *Exact mechanism to be confirmed during negotiation of the sale contract..*
Timing	The sale is subject to Bury Council cabinet approval which is to take place on Thursday 15th January 2026 Both parties will endeavour to achieve contractual exchange of the conditional contract within [3] weeks of the cabinet decision.
Early access	The Purchaser is be granted access to the site to carry our further survey work. Works to be carried out at purchasers' risk and the council to be fully indemnified via a form of licence.

Legal Costs	Each party will be responsible for its own legal costs incurred throughout the transaction
Estate Charge	The sales contract will incorporate an annual Estate Charge, which will commit the purchaser to pay a fair & reasonable proportion of the costs in repairing and maintaining the adjacent Sustainable Urban Drainage System (SuDS) pond and associated pipework, which serves the majority of Chamberhall Business Park.
Conditions	Subject to the following: ▪ Contract ▪ Vendor/Landlord's formal Approval including cabinet decision referred to above. ▪ Purchaser/Tenant/Developer's Board Approval

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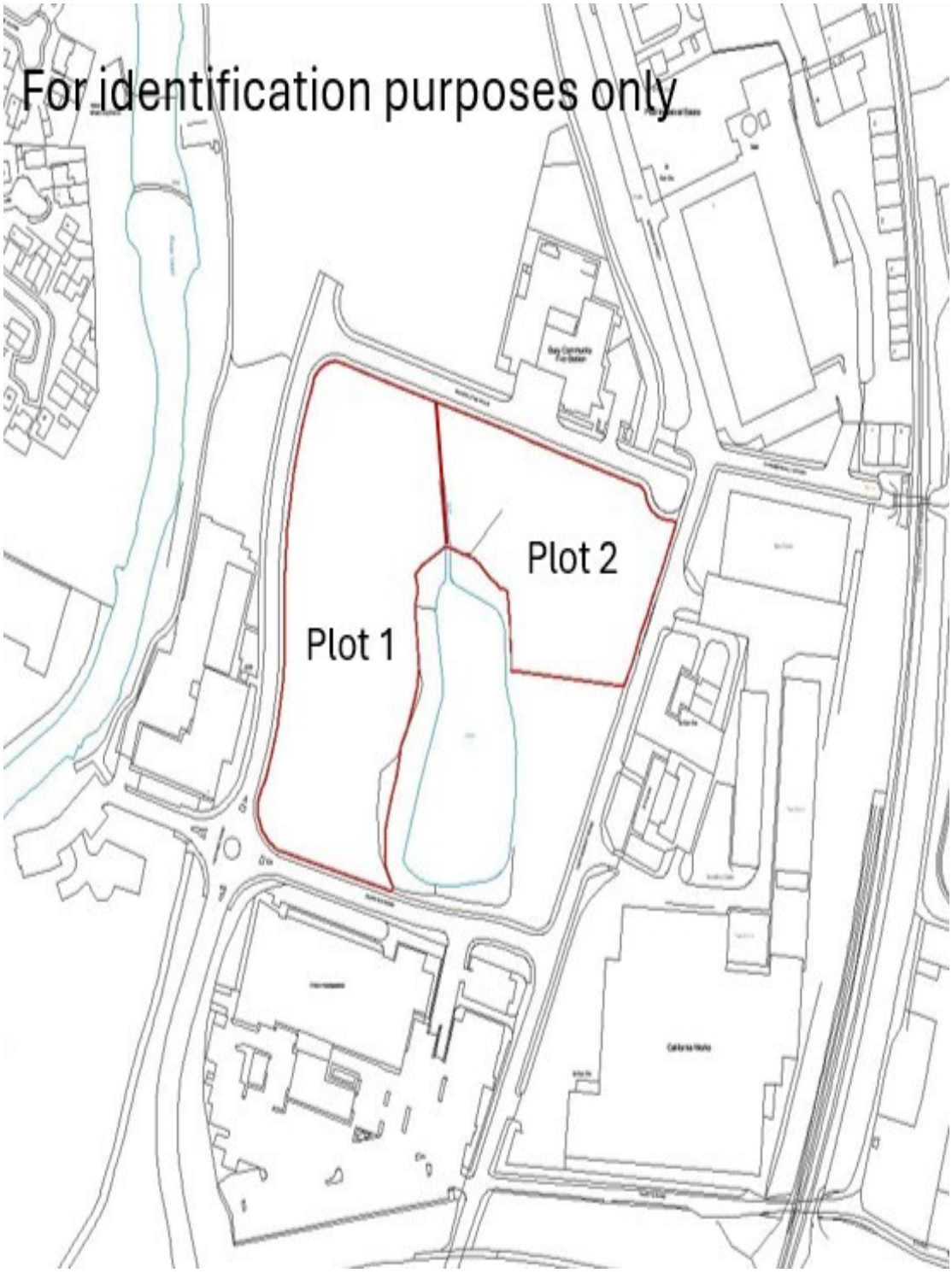
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Plot 2
Plot 1

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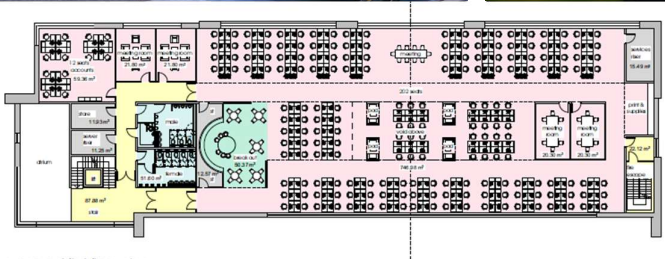
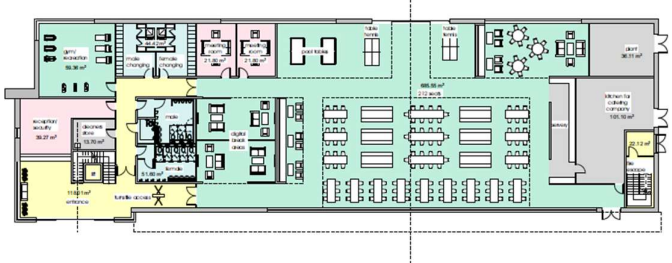
Chamberhall Business Park

Crown Gas & Power Office Vision



proposed first floor plan 1:200



proposed ground floor plan 1:200

*indicative images

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Docusign Envelope ID: 6C62B1AB-77AF-47F7-91F5-740F6D74F02D

Valuation Report

In respect of:

Land at Chamberhall Business Park
Harvard Road
Bury
BL9 0JU

On behalf of:

Bury Metropolitan Borough Council

Docusign Envelope ID: 6C62B1AD-77AF-47F7-91F5-740F6D74F02D

Legal Notice and Disclaimer

This valuation report (the "Report") has been prepared by CBRE Limited ("CBRE") exclusively for Bury Metropolitan Borough Council (the "Client") in accordance with the terms of engagement entered into between CBRE and the client dated 12 December 2024 ("the Instruction"). The Report is confidential to the Client and any other Addressees named herein and the Client and the Addressees may not disclose the Report unless expressly permitted to do so under the Instruction.

Where CBRE has expressly agreed (by way of a reliance letter) that persons other than the Client or the Addressees can rely upon the Report (a "Relying Party" or "Relying Parties") then CBRE shall have no greater liability to any Relying Party than it would have if such party had been named as a joint client under the Instruction.

CBRE's maximum aggregate liability to the Client, Addressees and to any Relying Parties howsoever arising under, in connection with or pursuant to this Report and/or the Instruction together, whether in contract, tort, negligence or otherwise shall not exceed the lower of:

a) 25% of the value of a single property, or, in the case of a claim relating to multiple properties 25% of the aggregated value of the properties to which the claim relates (such value being as at the Valuation Date and on the basis identified in the Instruction or, if no basis is expressed, Market Value as defined by the RICS); or
b) £20,000,000 (Twenty Million British Pounds).

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None of the information in this Report constitutes advice as to the merits of entering into any form of transaction.

If you do not understand this legal notice then it is recommended that you seek independent legal advice.

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Executive Summary

Executive Summary

Subject Property – Land at Chamberhall Business Park, Harvard Road, Bury

The subject property comprises development land, the total site extends to 3.16 ha (7.80 acres) however the site includes a pond and other undevelopable land which reduces the developable site area to 2.13 ha (5.27 acres).

Bury Council are the freeholders and are proposing to dispose of the site to Crown Oil and Gas (the Purchaser) to develop a new HQ office on part of the site. For the purpose of understanding the Purchaser's offer and the opportunity cost, we have been instructed to provide a valuation on the site based on two scenarios.

Scenario 1 - Light Industrial Whole Site – This appraisal is prepared on the assumption the whole site is developed as four multi-let warehouse units.

Scenario 2 – Office Development 3.67 acres and Light Industrial on 1.60 acres. The Purchaser's proposals are to develop a new HQ office of 40,000 sq ft office together with car parking over 3.67 acres. There is surplus land of 1.60 acres. The Purchaser is proposing to develop this parcel of land for small workshop units extending to six units and a total development of 25,000 sq ft.

Market Value – Scenario 1 Light industrial

Our opinion of Market Value of the freehold interest in the land and property at Chamberhall Business Park, Harvard Road, Bury as at the date of the valuation (30 July 2025) is **£1,825,000 (One Million, Eight Hundred and Twenty-Five Thousand Pounds) exclusive of VAT.**

- The valuation reflects £345,000 per acre. The above scenario has been prepared to understand the opportunity cost to Bury Council for the proposed sale of the land to the Purchaser.
- **Please note the figures reported above does not include any deductions for abnormal ground conditions. The stage 1 Ground Investigation Report identifies made ground across the site but the actual costs of site remediation are not currently known and would need to be deducted from this figure.**
- Please refer to the main report for details of value inputs and methodology.

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Market Value – Scenario 2 Offices

As outlined above Crown Oil and Gas (the Purchaser) is proposing to develop an office HQ on the site, and the Council are seeking to retain employment within the Borough. CBRE have been instructed to provide a residual appraisal of the proposed office development. We have used market inputs for offices which results in a **negative land value**.

The proposals are for the site to be disposed of at £1. Which reflects the fact that office development in most locations outside of major city centres, is not viable in the current market.

Scenario 2 – Light Industrial

Our opinion of Market Value of the surplus 1.60 acres of land at Chamberhall Business Park, Harvard Road, Bury as at the date of the valuation (30 July 2025) is **£200,000 (Two Hundred Thousand Pounds) exclusive of VAT.**

- The land residual reflects a land value of £125,000 per acre.
- The valuation is subject to site specific cost estimates which have been provided by the Purchaser. In accordance with the heads of terms, there is the potential for the Council to recover additional sums for the land in the event the actual development costs are less than those adopted in the residual appraisal.

Key Valuation Factors

Strengths	• Established industrial location close to Bury town centre • Reasonable demand for new build light industrial accommodation both from an occupational and investor perspective • Freehold development land
Weaknesses	• The Purchaser is seeking to develop offices on the site which is not the most viable use of the land and will require support from Bury Council to dispose of the site at less than Market Value. • Uncertainties in ground conditions that may impact on development costs

Valuation Comments

Marketability and Potential Purchasers

The subject comprises development land and there is reasonable demand for light industrial and warehouse accommodation in this location. There has been development by St Modwen (now renamed Indurent) at phase one Chamberhall and also on adjacent land which is currently under construction.

There are uncertainties on ground conditions, our valuation under scenario 1 assumes reasonable ground condition and any costs of remediation or costs associated with additional foundations / alternative construction methods will need to be deducted from our valuation.

For Scenario 2 – Offices The Purchaser will be responsible for any costs associated with Bio Diversity Net Gain and adverse ground conditions

For Scenario 2 – Light Industrial The Purchaser has provided an estimate of costs assuming that site remediation is required. We understand that the parties have agreed by way of an Overage Agreement to adopt the costs provided by the purchaser with the ability for Bury Council to recover additional capital receipts for the land in the event the ground conditions are suitable for the proposed development.

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Valuation Report

Introduction

Report Date	06 October 2025
Valuation Date	30 July 2025
Addressee	Bury Metropolitan Borough Council PO Box 525 Bury BL8 9FT
The Property	The freehold land at Chamberhall Business Park, Harvard Road, Bury, BL9 0JU (the 'Site').
Instruction	To value the Property as at the Valuation Date in accordance with Terms of Engagement dated 12 December 2024.
Property Description	Development Land
Status of Valuer	You have instructed us to act as an External valuer as defined in the current version of the RICS Valuation – Global Standards. Please note that the Valuation may be investigated by the RICS for the purposes of the administration of the Institution's conduct and disciplinary regulations in order to ensure compliance with the Valuation Standards.
Purpose and Basis of Valuation	The Valuation will be on the basis of **Market Value** as defined in the current edition of the RICS Valuation – Global Standards and in the VSTOB.
Market Value – Scenario 1 Light Industrial Whole Site	**£1,825,000 (ONE MILLION EIGHT HUNDRED AND TWENTY-FIVE THOUSAND POUNDS)** exclusive of VAT
Market Value – Scenario 2 Offices	**£1 (ONE POUND)** exclusive of VAT
Market Value – Scenario 2 Light Industrial	**£200,000 (TWO HUNDRED THOUSAND POUNDS)** exclusive of VAT
Market Conditions	Heightened geopolitical tensions, international trade restrictions following on from the US Government trade tariffs announcement on 2 April 2025 (which could be inflationary) and restricted growth in many economies has increased the potential for constrained credit markets and general uncertainty across global markets. Experience has shown that consumer and investor behaviour can quickly change during fluctuating market conditions. It is important to note that the conclusions set out in this report are valid as at the valuation date only. Where appropriate, we recommend that the valuation is closely monitored, as we continue to track how markets respond to the current environment.

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Joint Tenancies and Indirect Investment Structures	Where a property is owned through an indirect investment structure or a joint tenancy in a trust for sale, our Valuation represents the relevant apportioned percentage of ownership of the value of the whole property, assuming full management control. Our Valuation therefore is unlikely to represent the value of the interests in the indirect investment structure through which the property is held.
Valuation Approach for Properties in Course of Development	In the case of development valuations, we would draw your attention to the fact that, even in normal market conditions, the residual method of valuation is very sensitive to changes in key inputs, with small changes in variables (such as the timing of the development, finance/construction costs and sales rates) having a disproportionate effect on land value. Consequently, in reference to the Market Conditions section above it is inevitable that there is even greater uncertainty, with site values being susceptible to much more variance than normal.
Construction Contracts	Recently there has been a decrease in demand in the construction industry, driven by a reduction in activity within housing, commercial and industrial sectors as a result of increased borrowing costs. The diminution in demand has been driven by the increased costs of capital affecting levels of investment. Inflationary pressures (although significantly reduced at present) still prevail and BCIS are still forecasting cost price inflation over the next five years. This may place additional pressure on both the developer's and builder's profit margins and development viability, and this should therefore be given careful consideration in lending and investment decisions. Caution is advised in this regard. We also recommend you obtain appropriate advice to confirm there are no adverse conditions within the final construction/building contract and/or ensure there are additional funds available to cover potential cost escalations. Rising building costs and shortages of labour and materials may also affect the builder's viability and/or ability to meet construction timeframes. In this climate, we strongly recommend you verify the experience and financial capability of the builder to complete the project on time and on budget. Again, caution is advised in this regard. In the absence of any information to the contrary, we have assumed that the construction contract and any warranties will be assignable. We recommend careful checking on the building contract to confirm our assumption.
Building Safety Levy	On 23 January 2024, the government issued its initial response to the Building Safety Levy (BSL) consultation. The intention of the BSL is to impose a levy on a wide range of residential developments including 'for sale' housing, new BTR properties (inc. conversions to resi), purpose-built student accommodation, and private retirement. There will be exemptions - including affordable housing and smaller developments – and the government intends to "set a differential geographic levy rate at a local authority level", and "brownfield sites will be charged at a rate that is 50% of the greenfield rate". Currently any developments with fewer than 10 units would also be exempt from the levy. A second consultation is running until 20 February 2024 to further clarify details. Once this has been finalised, it will be taken to Parliament as a secondary legislation. For clarity, our valuation makes no specific allowance for a BSL.

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Compliance with Valuation Standards

The Valuation has been prepared in accordance with the latest version of the RICS Valuation – Global Standards (incorporating the International Valuation Standards) and the UK national supplement (the "Red Book") current as the Valuation Date.

The Property has been valued by a valuer who is qualified for the purpose of the Valuation in accordance with the Red Book. We confirm that we have sufficient local and national knowledge of the particular property market involved and have the skills and understanding to undertake the Valuation competently.

Where the knowledge and skill requirements of the Red Book have been met in aggregate by more than one valuer within CBRE, we confirm that a list of those valuers has been retained within the working papers, together with confirmation that each named valuer complies with the requirements of the Red Book.

This Valuation is a professional opinion and is expressly not intended to serve as a warranty, assurance or guarantee of any particular value of the subject Property. Other valuers may reach different conclusions as to the value of the subject Property. This Valuation is for the sole purpose of providing the intended user with the valuer's independent professional opinion of the value of the subject Property as at the Valuation Date.

Sustainability Considerations

For the purposes of this report, we have made enquiries to ascertain any sustainability factors which are likely to impact on value, consistent with the scope of our terms of engagement.
Sustainability encompasses a wide range of physical, social, environmental, and economic factors that can affect the value of an asset, even if not explicitly recognised. This includes key environmental risks, such as flooding, energy efficiency and climate, as well as design, legislation and management considerations - and current and historic land use. CBRE are currently gathering and analysing data around the four key areas we feel have the most potential to impact on the value of an asset:

- Energy Performance
- Green Certification
- Sources of Fuel and Renewable Energy Sources
- Physical Risk/Climate Risk

Where we recognise the value impacts of sustainability, we are reflecting our understanding of how market participants include sustainability factors in their decisions and the consequential impact on market valuations.

Biodiversity Net Gain

Under the Environment Act, Biodiversity Net Gain (BNG) legislation became effective from January 2024. BNG is addressed through Section 106 Agreements and will require all new development projects to demonstrate 10% BNG, and to maintain this for a period of 30 years from practical completion. BNG costs will be borne by the Developer.

The BNG process requires a qualified Ecologist's baseline study followed by the implementation of a Habitat Enhancement, Management and Monitoring Plan (HEMMP). Legislation is in favour of BNG delivery on-site but, there are mechanisms for 'biodiversity offsetting' within the same Local Authority.

BNG legislation is in its infancy and its implications for development are still emerging. We have sought to confirm that, where necessary, BNG obligations have been addressed. In the absence of information our Valuation assumes that BNG obligations can be met within any costs and development programmes provided to us. We recommend that your Project Monitor and/or legal advisors seek to confirm this.

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Climate Risk Legislation	The UK Government is currently producing legislation which enforces the transition to net zero by 2050, and the stated 78% reduction of greenhouse gases by 2035 (based on a 1990 baseline). We understand this to include an update to the Minimum Energy Efficiency Standards, stated to: — Increase the minimum requirements for non-domestic properties from an E (since 2018) to a B in 2030; and, — Incentivise a minimum EPC of C for privately rented residential properties from 2028. The government also intends to introduce an operational rating. It is not yet clear how this will be legislated, but fossil fuels used in building, such as natural gas for heating, are incompatible with the UK's commitment to be Net Zero Carbon by 2050. This upcoming legislation could have a potential impact to future asset value. We also note that the UK's introduction of mandatory climate related disclosures (reporting climate risks and opportunities consistent with recommendations by the "Task Force for Climate Related Financial Disclosure" (TCFD)), including the assessment of so-called physical and transition climate risks, will potentially have an impact on how the market views such risks and incorporates them into the sale of letting of assets. The European Union's "Sustainable Finance Disclosure Regulations" (SFDR) may impact on UK asset values due to the requirements in reporting to European investors.
Assumptions	The Property details on which each Valuation are based are as set out in this report. We have made various assumptions as to tenure, letting, taxation, town planning, and the condition and repair of buildings and sites – including ground and groundwater contamination – as set out below. If any of the information or assumptions on which the Valuation is based are subsequently found to be incorrect, the Valuation figures may also be incorrect and should be reconsidered.
Variations and/or Departures from Standard Assumptions	None
Independence	The total fees, including the fee for this assignment, earned by CBRE Ltd (or other companies forming part of the same group of companies within the UK) from the Addressee (or other companies forming part of the same group of companies) is less than 5.0% of the total UK revenues.
Previous Involvement and Conflicts of Interest	CBRE Development Advisory have previously provided advice to Bury Council in respect of marketability of the subject property. CBRE Valuation Services have provided valuation advice to adjacent owners for industrial investments. We do not consider that this previous involvement represents a conflict of interest none of the valuers involved in this instruction have been involved in providing advice to neighbouring owners, nor do we have a financial interest in the result of the valuation. Copies of our conflict-of-interest checks have been retained within the working papers.
Reliance	The contents of this Report may only be relied upon by: i) Addressees of the Report; and

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ii) Parties who have received prior written consent from CBRE in the form of a reliance letter;

for the specific purpose set out herein and no responsibility is accepted to any third party for the whole or any part of its contents.

Publication

Neither the whole nor any part of our report nor any references thereto may be included in any published document, circular or statement nor published in any way without our prior written approval of the form and context in which it will appear.

Such publication of, or reference to this report will not be permitted unless it contains a sufficient contemporaneous reference to any departure from the Red Book or the incorporation of the special assumptions referred to herein.

Yours faithfully

DocuSigned by:
FB0A431039554EB...

Gareth Hughes
MRICS
Director
RICS Registered Valuer
For and on behalf of CBRE Limited

+44 161 233 5608
Gareth.hughes@cbre.com

Yours faithfully

DocuSigned by:
Siobhan Fraser
51F584F9C262461...

Siobhan Fraser
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Source of Information and Scope of Works

Sources of Information	We have carried out our work based upon information supplied to us by your professional advisors, as set out within this report, which we have assumed to be correct and comprehensive. Indicative floor plans: **Scenario 1 - Light Industrial Whole Site** • Produced by AEW – Proposed Site Plan Option 4 – Concept Design **Scenario 2 – Part Office Development and Part Light Industrial** • Office – Produced by CDP Architects – Crown Gas and Power dated 26/11/2024 • Light Industrial - Produced by CDP Architects – Crown Gas and Power dated 26/11/2024 • Heads of Terms for proposed transaction – Draft Heads of Terms dated 30 June 2025
Inspection	The site was inspected by Tom Minnock MRICS, RICS Registered Valuer on 10 December 2024.
Areas	We have not measured the site but have relied upon the floor areas provided to us by you or your professional advisors within the design plans detailed above which we have assumed to be correct and comprehensive. We have assumed the layout has been calculated using the: Gross Internal Area (GIA) or Net Internal Area (NIA) according to use, as set out in the latest edition of the RICS Property Measurement Standards.
Environmental Matters	We have read the Phase 1 Ground Investigation produced by Civil Earth. The report concludes that the site represents overall medium environmental risk however there is evidence of made ground, and the southern part of the site was found to have potential for ground gas. Based on the findings of this report, CBRE's own inspection and planning enquiries, we have identified the potential for environmental risk factors which, in our opinion, would require further investigation. For the purpose of the valuation, we have assumed adequate ground conditions to support the proposed development however CBRE give no warranty as to the absence of such environmental risk factors. The report identifies there is made ground, and it will require a foundation strategy or alternatively a ground remediation strategy. We have not been provided with any indicative costs in relation to ground conditions and when known these should be deducted from the Market Value as reported under Scenario 1.
Services and Amenities	We understand that the Property is located in an area served by mains gas, electricity, water and drainage. Enquiries regarding the availability of utilities/services to the proposed development are outside the scope of our report. We have assumed there is capability for connection to mains services and the costs of connection are assumed to be not anticipated to be onerous.
Repair and Condition	We have not carried out building surveys, tested services, made independent site investigations, inspected woodwork, exposed parts of the structure which were covered, unexposed or inaccessible, nor arranged for any investigations to be carried out to determine whether or not any deleterious or hazardous materials or techniques have been used, or are present, in any part of the Property. We are unable, therefore, to give any assurance that the Property is free from defect.

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Titles, Tenures and Lettings	Details of title/tenure under which the Property is held and of lettings to which it is subject are as supplied to us. We have not generally examined nor had access to all the deeds, leases or other documents relating thereto. Where information from deeds, leases or other documents is recorded in this report, it represents our understanding of the relevant documents. We should emphasise, however, that the interpretation of the documents of title (including relevant deeds, leases and planning consents) is the responsibility of your legal adviser. We have not conducted credit enquiries on the financial status of any tenants. We have, however, reflected our general understanding of purchasers' likely perceptions of the financial status of tenants.

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Valuation Assumptions

Capital Values	The Valuation has been prepared on the basis of "Market Value", which is defined in the Red Book as: "The estimated amount for which an asset or liability should exchange on the Valuation Date between a willing buyer and a willing seller in an arm's length transaction, after proper marketing and where the parties had each acted knowledgeably, prudently and without compulsion." The Valuation represents the figure that would appear in a hypothetical contract of sale at the Valuation Date. No adjustment has been made to this figure for any expenses of acquisition or realisation - nor for taxation which might arise in the event of a disposal. No account has been taken of any inter-company leases or arrangements, nor of any mortgages, debentures or other charge. No account has been taken of the availability or otherwise of capital based Government or European Community grants.
Rental Values	Unless stated otherwise rental values indicated in our report are those which have been adopted by us as appropriate in assessing the capital value and are not necessarily appropriate for other purposes, nor do they necessarily accord with the definition of Market Rent in the Red Book, which is as follows: "The estimated amount for which an interest in real property should be leased on the Valuation Date between a willing lessor and a willing lessee on appropriate lease terms in an arm's length transaction, after proper marketing and where the parties had each acted knowledgeably, prudently and without compulsion."
Fixtures, Fittings and Equipment	Where appropriate we have regarded the shop fronts of retail and showroom accommodation as forming an integral part of the building. Landlord's fixtures such as lifts, escalators, central heating and other normal service installations have been treated as an integral part of the building and are included within our Valuations. Process plant and machinery, tenants' fixtures and specialist trade fittings have been excluded from our Valuations. All measurements, areas and ages quoted in our report are approximate.
Environmental Matters	In the absence of any information to the contrary, we have assumed that: a) the Property/Properties is/are not contaminated and is not adversely affected by any existing or proposed environmental law; b) any processes which are carried out on the Property/Properties which are regulated by environmental legislation are properly licensed by the appropriate authorities; c) in England and Wales, the Property/Properties possesses current Energy Performance Certificates (EPCs) as required under the Government's Energy Performance of Buildings Directive – and that they have an energy efficient standard of 'E', or better. Under the Energy Efficiency (Private Rented Property) (England and Wales) Regulations 2015 it became unlawful for landlords to rent out business premise from 1st April 2018 – unless the site has reached a minimum EPC rating of an 'E', or secured a relevant exemption. In Scotland, we have assumed that the Property/Properties possesses current EPCs as required under the Scottish Government's Energy Performance of Buildings (Scotland) Regulations – and that they meet energy standards equivalent to those introduced by the 2002 building regulations. The Assessment of Energy Performance of Non-Domestic Buildings

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	(Scotland) Regulations 2016 requires building owners to commission an EPC and Action Plan for sale or new rental of non-domestic buildings bigger than 1,000 sq m that do not meet 2002 building regulations energy standards. Action Plans contain building improvement measures that must be implemented within 3.5 years, subject to certain exemptions; d) the Property/Properties possesses current energy performance certificates as required under government directives. e) the Property is either not subject to flooding risk or, if it is, that sufficient flood defences are in place and that appropriate building insurance could be obtained at a cost that would not materially affect the capital value; and f) invasive species such as Japanese Knotweed are not present on the Property. High voltage electrical supply equipment may exist within, or in close proximity of, the Property. The National Radiological Protection Board (NRPB) has advised that there may be a risk, in specified circumstances, to the health of certain categories of people. Public perception may, therefore, affect marketability and future value of the Property. Our Valuation reflects our current understanding of the market and we have not made a discount to reflect the presence of this equipment.
Repair and Condition	In the absence of any information to the contrary, we have assumed that: a) there are no abnormal ground conditions, nor archaeological remains, present which might adversely affect the current or future occupation, development or value of the Property; b) the Property is free from rot, infestation, structural or latent defect; c) no currently known deleterious or hazardous materials or suspect techniques, including but not limited to Composite Panelling, ACM Cladding, High Alumina Cement (HAC), Asbestos, Reinforced Autoclaved Aerated Concrete (Raac), have been used in the construction of, or subsequent alterations or additions to, the Property; and d) the services, and any associated controls or software, are in working order and free from defect. We have otherwise had regard to the age and apparent general condition of the Property. Comments made in the property details do not purport to express an opinion about, or advise upon, the condition of uninspected parts and should not be taken as making an implied representation or statement about such parts.
Title, Tenure, Lettings, Planning, Taxation and Statutory & Local Authority Requirements	Unless stated otherwise within this report, and in the absence of any information to the contrary, we have assumed that: a) the Property possesses a good and marketable title free from any onerous or hampering restrictions or conditions; b) the building has been erected either prior to planning control, or in accordance with planning permissions, and has the benefit of permanent planning consents or existing use rights for their current use; c) the Property is not adversely affected by town planning or road proposals; d) the building complies with all statutory and local authority requirements including building, fire and health and safety regulations, and that a fire risk assessment and emergency plan are in place; e) only minor or inconsequential costs will be incurred if any modifications or alterations are necessary in order for occupiers of the Property to comply with the

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provisions of the Disability Discrimination Act 1995 (in Northern Ireland) or the Equality Act 2010 (in the rest of the UK);

f) all rent reviews are upward only and are to be assessed by reference to full current market rents;

g) there are no tenant's improvements that will materially affect our opinion of the rent that would be obtained on review or renewal;

h) tenants will meet their obligations under their leases, and are responsible for insurance, payment of business rates, and all repairs, whether directly or by means of a service charge;

i) there are no user restrictions or other restrictive covenants in leases which would adversely affect value;

j) where more than 50% of the floorspace of the Property is in residential use, the Landlord and Tenant Act 1987 (the "Act") gives certain rights to defined residential tenants to acquire the freehold/head leasehold interest in the Property. Where this is applicable, we have assumed that necessary notices have been given to the residential tenants under the provisions of the Act, and that such tenants have elected not to acquire the freehold/head leasehold interest. Disposal on the open market is therefore unrestricted;

k) where appropriate, permission to assign the interest being valued herein would not be withheld by the landlord where required;

l) vacant possession can be given of all accommodation which is unlet or is let on a service occupancy; and

m) Land Transfer Tax (or the local equivalent) will apply at the rate currently applicable. In the UK, Stamp Duty Land Tax (SDLT) in England and Northern Ireland, Land and Buildings Transaction Tax (LABTT) in Scotland or Land Transaction Tax (LTT) in Wales, will apply at the rate currently applicable

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Property Details

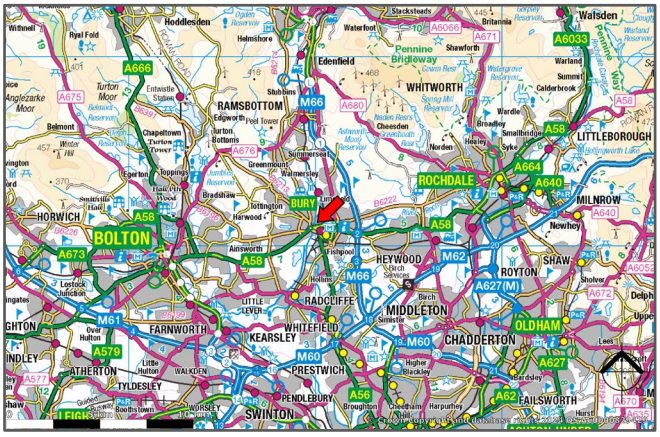
Property Photos

Valuation Date:	Inspection Date:	Inspected By:
30 July 2025	10 December 2024 (External)	Tom Minnock MRICS

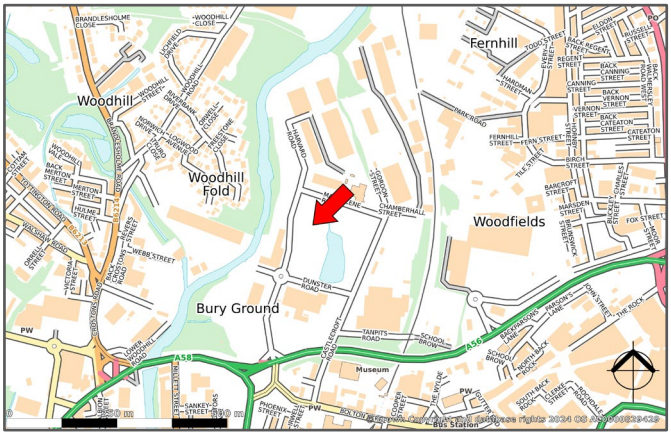
View of site looking north

View of site looking south

View of site looking east



Ordnance Survey 'Edozo' City Plan



Ordnance Survey 'Edozo' Street Plan

Ordnance Survey 'Edozo' Property Plan

Docusign Envelope ID: 6C62B1AD-77AF-47F7-91F5-740F6D74F02D

Location & Situation

Location	Bury is a town in Greater Manchester, approximately 12.7 km (7.9 miles) north of Manchester city centre, 8.9 km (5.5 miles) east of Bolton and 9.5 km (5.9 miles) west of Rochdale. Bury is the administrative centre of the Metropolitan Borough of Bury. The estimated population of Bury was 81,101 in 2021, whereas the wider borough was estimated to have a population of 194,606 in 2022. Historically part of Lancashire, Bury developed during the Industrial Revolution as a mill town manufacturing textiles. The town is currently known for its open-air market and following the post-war decline in the cotton industry has developed as an important commuter town for Manchester. Bury benefits from strong communication links, the A56 running north-south through the town, the A58 running west-east from Bolton towards Rochdale as well as linking with the M66 at junction 2, a short distance to the north of its intersection with the M60 Manchester orbital motorway and the M62 giving access to West Yorkshire, Liverpool and the wider national motorway network.
Situation	The subject property is situated on Chamberhall Business Park, approximately 0.8 km (0.5 miles) to the north of Bury town centre. The Park sits to the north side of Peel Way (A56); the ring road around Bury town centre. The A56 Peel Way is accessed via Harvard Road, c.175m to the south, which in turns provides access to Bolton c.5 miles to the west and Junction 2 of the M66 motorway, c.2 miles to the east (via the A58). The M66 connects with the Junction 18 of the M60 motorway c.3.3 miles to the south, providing access across Greater Manchester and connects to the M61 towards Lancashire; and is also the start of the M62 motorway which routes to West Yorkshire to the east. The property therefore benefits from excellent road connections. Bury Interchange lies approximately 600m to the south of the site and is a 13-minute walk, providing frequent Metrolink services to Manchester City Centre every 6 minutes, as well as being home to Bury's bus station. Regular bus services from Bury Interchange run to Manchester, Bolton, Rochdale, Ramsbottom and Heywood. Neighbouring occupiers include MKM Building Supplies, Greater Manchester Police, Bury Community Fire Station and Burgaflex UK, amongst others.

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Existing Property

Inspection	The Property was inspected by Tom Minnock, MRICS, RICS Registered Valuer on 10 December 2024.
Current Use	The land is suitable for light industrial and storage purposes. **Previous site history and use** The appraisal site forms part of the former Chamber Hall estate, originally home to the Peel family during the 19th Century. During this time, the site comprised a reed bed serving an ornamental pond. By the late 19th Century, the area surrounding the appraisal site had seen substantial industrial development in relation to Bury's growing role in the cotton industry. This included the Bury Ground print works to the south west of the appraisal site which had been developed by the 1940s, and the construction of the Peel Mills cotton works to the north east which began in 1855. The Chamber Hall was demolished in the 1900s, being replaced by Castlecroft Road which enabled further industrialisation. Two reservoirs were created to serve the industrial uses, the smaller remains in situ in the form of the attenuation pond. A second, larger reservoir was situated to the west and covered much of the western portion of the appraisal site was subsequently filled in and now comprises made ground. Following this period of industrialisation the area suffered from gradual decline in the mid-20th Century, including the closure of Peel Mills and many other industrial uses, leaving much of the site derelict. The award of a Derelict Land Grant in the 1970s allowed the area to be laid out as public open space, known as Bury Ground. Bury Ground was subsequently allocated for development in the Unitary Development Plan for Bury, adopted in 1997. Proposals for the site's development have been progressed in the 21st Century, including the construction of access roads and the implementation of a drainage strategy involving the use of the reservoir on the appraisal site as an attenuation pond to support development. The first phases of construction were completed in the early 2010s on the plots surrounding the appraisal site, including the police headquarters, fire station, and various other office and employment uses. Several masterplans have been proposed for Chamberhall since this time which includes the proposed development reflecting both light industrial and office uses. A hybrid planning application (ref. 63185) which was approved in 2019. Phase 1 of this proposal was completed by St Modwen in 2020, leaving the subject site identified for Phase 2 vacant.
Site Area	We have measured the site using Edozo Ordnance Survey mapping and calculate the site to be 3.16 ha (7.80 acres) however the site includes a pond and other undevelopable land which reduces the developable site area to 2.13 ha (5.27 acres).
Access	The site is located in an accessible area, to the north of Peel Way (A56) which bounds the north of the town centre, providing access to Bury's ring road. The site is bounded by highways in each direction, thus enabling flexibility for the site's future access. The site benefits from good access and egress points with multiple road access via Harvard Road, Magdalene Road, Castlecroft Road or Dunster Road. Depending on the chosen development, the site could benefit from one or multiple access points.
Demolition / Alterations	There are no buildings on the site.

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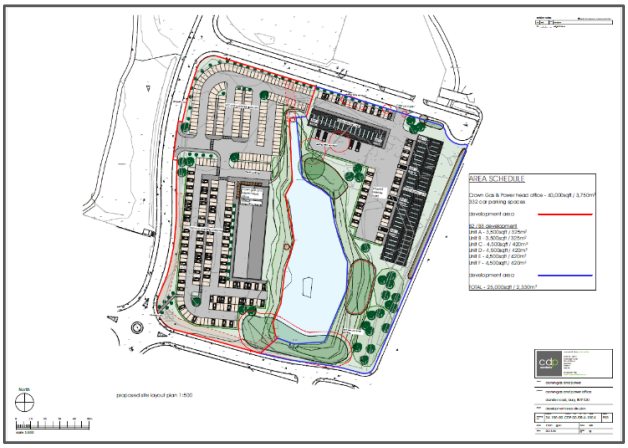
Proposed Development

Site photograph



Proposed Development Offices

Overview and background

Chamberhall is a vacant brownfield site measuring approximately 3.16 ha (7.80 acres), of which the net developable area is calculated to be 2.13 ha (5.27 acres).

A hybrid application for Chamberhall Business Park (ref. 63185) was approved in 2019, proposing business and light industrial uses in accordance with an approved masterplan. Phase 1 has now been fully built out by St Modwen Developments (north of the site) and consists of c.120,000 sq ft of light industrial space, which completed construction in 2020.

Outline planning permission was secured for a further two phases comprising Phase 1A to the north-west of the subject site and Phase 2. The subject property is all of the land within Phase 2. The planning consent approved as part of the outline permission for the site identifies Use Classes A1, A3, A4, A5, B1, B2, B8, C1 (hotel), D1 (creche) and D2 (gym). The property was to form phase 2 of St. Modwen's light industrial development at Chamberhall Business Park, however this has not progressed as originally planned.

Condition 42 of this hybrid planning permission stipulates that applications for approval of reserved matters must be made not later than five years from the grant of planning consent. The Decision Notice was issued on 7th February 2019, meaning an application for reserved matters must have been brought by 7th February 2024, therefore it will be necessary to obtain a suitable planning consent for the site.

We understand that the Purchaser will be submitting a new planning application in accordance with the proposed development which comprises a 3,716 sq m (40,000 sq ft) office development and six light industrial units.

For the purpose of the instruction, we have been asked to report on two scenarios to help Bury Council to understand the both the proposed sale and also the opportunity cost of the sale.

We have therefore considered Scenario 1 as a light industrial development over the whole site to assess the potential capital receipt achievable in the open market and Scenario 2 which is part office and part light industrial as proposed by the Purchaser (Crown Oil & Gas).

Scenario 1 – Light Industrial Development

CBRE have been provided with a scheme design as produced by AEW Concept Designs and our colleagues in Development Advisory have provided advice on the suitability of the design as a hypothetical light industrial development. We have determined this is an appropriate scheme on which to assess the Market Value of the land.

This assumes a multi-let development of 8,528.6 sq m (91,804 sq ft) across the whole site.

The design assumes a light industrial development of 4 units reflecting units ranging from 16,000 – 25,000 sq ft which is consistent with the market for this type of development and

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consistent with mutli-let schemes designed by Kier / Chancerygate at Manchester Trade Park and Oldham Broadway respectively.

Scenario 2 - Office Development

The proposals are for the site to be sold to Crown Oil and Gas who are seeking to develop a new headquarters office building for owner occupation.

The proposed development is to be a detached 3 storey office of 3,716 sq m (40,000 sq ft) Net Internal Area together with 332 car parking spaces which is a ratio of 1:120 sq ft reflecting part of the whole site. The proposals extend to 1.49 ha (3.67 acres).

From our experience of valuing similar out of town business parks for office use, car parking ratios of 1:250 sq ft would be appropriate, which would offer 160 car spaces and a reduced site area of 1.21 ha (3.00 acres). Individual occupiers will have different requirements depending on their business, the number of staff they employ and expectations to be working from the office on a regular basis. We have therefore appraised the site based on the proposals as provided by the Purchaser.

In addition to the office area, there is a surplus parcel of land extending to 0.65 ha (1.60 acres). We have assessed the value of this plot of land assuming a multi-let light industrial development of 25,000 sq ft designed by CDP Architects.

Floor Area and Layout

As outlined above CBRE have been provided with areas of the proposed development as produced by AEW architect.

Scenario 1 – Light Industrial Development over the Whole Site

The light industrial development assumes the whole site as industrial which extends to8,528.6 sq m (91,804 sq ft) over four blocks and assumes a build based on:

- Unit 1 – 24,862 sq ft
- Unit 2 – 26,766 sq ft
- Unit 3 – 16,585 sq ft
- Unit 4 – 23,591 sq ft

Scenario 2 - As outlined above, is based on areas provided by the Purchaser and prepared by CDP Architects the plan is referenced '24.180.00.cdp.00.DR-A-100.4 - Crown gas and power'.

The Purchaser/ Council have agreed to use the areas as outlined on this plan as the basis of the land sale and this is referred to as the proposed development. This plan shows:

- Office development of 40,000 sq ft and 332 car parking spaces on 3.67 acres;
- Six light industrial units extending to a total of 25,000 sq ft; two units of 3,500 sq ft and four units of 4,500 sq ft.

Specification

Office specification

For the office, we have not been provided with an office specification and have assumed a Grade A office complete with the following specification:

- Open planned floor plates
- Suspended ceilings
- Raised access flooring

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- Carpeted floors
- Double glazed windows
- Lighting
- Air conditioning
- Painted and plastered walls
- Toilets
- Lift access

Light industrial specification

For the industrial properties, we have not been provided with an industrial specification and have assumed the following:

- Steel portal frame
- Steel profile cladding
- 1x level access electric loading door per unit
- Concrete internal flooring
- Internal warehouse lighting
- Open plan warehouse space
- 5-10% of gross internal area set for office space
- External car parking provision / external yard space

Technical and Ground Conditions

As part of the CBRE instruction in January 2024 for the development feasibility and strategy report, various surveys were commissioned for due diligence purposes. We list the surveys undertaken in the site below:

- Topographical Survey
- Phase 1 Ground Investigation (and Phase 2 GI review)
- Flood Risk Assessment
- Highways and Access Appraisal
- Utilities Search Report
- Preliminary Arbocultural Assessment
- Preliminary Ecological Appraisal
- Biodiversity Net Gain

We list some of the findings below:

Phase 1 Ground Investigation (and Phase 2 GI review)

The Phase 1 Desk Study was completed by Civic Earth Limited with the aim of assessing potential human health, environmental and geotechnical risk and constraints associated with the proposed development.

The Study identified that there is generally a moderate risk to identified receptors from potential contaminants associated with the current and former uses of the site and

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surrounding area and potential made ground associated with the former development of the site and potential infilling of surface water features. In addition, there are a number of potential geotechnical constraints associated with the potential for below ground obstructions, infilled surface water features on site, variable thickness of Made Ground associated with the development history of the site and potential variability of the underlying superficial deposits.

The site is also located within an area of low risk from unexploded ordnance and it is therefore recommended that pre-desk study assessment is undertaken to confirm whether any other military activity may have occurred at the site.

It was recommended that a detailed review should be undertaken on the available site investigation data and risk assessments for the site. Once this is completed, it was recommended that an intrusive ground investigation be undertaken to assess for the identified contaminants of concern and enable a remediation strategy to be developed, if required. In addition, the ground investigation should be designed to evaluate the potential geotechnical risks associated with potential development and inform the geotechnical design.

As part of the due diligence undertaken for the Phase 1 Ground Investigation previous studies in the locality were analysed. A Phase 2 site investigation, undertaken by Atkins on behalf of St Modwen was completed in 2015 for the site boundary. The review of the information included in this report was presented in an addendum to the Phase 1 Investigation included in this instruction. A copy of the review is included at Appendix C.

Key findings of the Phase 2 investigation for consideration are:

- Made Ground

  Across the site made ground as found in varying quantities, in line with the findings as part of the Phase 1 and previous use of the site. The maximum depth this was found was 7.5m, where previous a reservoir was sited. This would inform the foundation strategy on the site or alternatively ground remediation would be recommended. A strategy would be required as part of early design development of the site.

- Gas Risk

  The southern portion of the site was found to have potential for ground gas. Remediation was recommended as part of these findings.

The opportunity to avoid a second intrusive Ground Investigation has been progressed. Reliance on the previous study will reduce the scope of investigation to a shallow study, understanding localised ground movement made since 2015. Discussion is ongoing with Indurent on their acceptance of reliance. If this is not provided, the information provided to date still allows for the feasibility assessment of the site. If the development of the site progresses, as a consequence of the made ground, localised investigation beneath structures would be required to inform detailed foundation design.

Flood Risk Assessment

The Flood Risk Assessment was completed by Civic Engineers with a site walkover being carried out on the 9th October 2023. The summary of the findings are set out below.

The site is at low risk of flooding from rivers or sea. There is a low risk of surface water flooding with the area at risk focused around the existing pond. It was recommended that a detailed flood risk assessment should be undertaken to support any planning application which should include an assessment of flood risk from the River Irwell.

In order to understand whether the existing pond has capacity to accommodate surface water flows from the development site it was recommended that a detailed assessment of

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the existing site drainage infrastructure should be undertaken. It was also recommended that existing drains and sewers within the site boundary should be considered when development proposals for the site are progressed.

Subject to the above recommended additional surveys, given the majority of the site (bar the pond) is in a Flood Zone 1, all types of development should be compatible from a flood risk perspective.

Highways and Access Appraisal

Civic Engineers provided a high-level review of the highways appraisal and the four roads on the periphery and their suitability for new vehicle access.

The report notes pedestrian access can be achieved from all boundaries of the property. Cyclists can access the site from Harvard Road and Castlecroft Road and the nearest bus stop is a 7-minute walk from the property. Several highly feasible access points (no constraints) for vehicles were noted on the west side of the property (Harvard Road) and north of the property (Magdalene Road). The architect should now be able to utilise the suggested access points for their feasibility studies.

The report additionally notes areas for consideration for the full planning application as follows:

1. Trip Generation based on forecasted sqm for each land use and an assessment of the need for junctions' assessments or trips distribution accordingly.

2. Cycle and Car Parking Quantum Provision in line with Bury's requirements.

3. Recommendation on minimum 5% of cycle parking to be wider spaced for disabled cyclists and at least 15% single racks.

4. Pool electric bikes and car clubs could be provided to encourage sustainable travel.

5. Review servicing strategy and fire access. Provision of loading/servicing bay will be required given loading restrictions on kerbside. Location of collection point to consider distance from proposed refuse store to avoid a managed solution (i.e., need for developer to carry bins).

6. EV charging provision to be according to Part S4 regulation.

7. Swept Path Analysis of vehicle movements on proposed layout and accesses to confirm geometry.

8. Confirmation on need of a Travel Plan update (given a Transport assessment and Framework Travel plan were produced for the earlier outline planning application, reference 63185).

Utility Search Report

Amethyst Surveys Limited undertook a utility search report on 16th November 2023. There are a limited number of utilities relating to gas, water, electricity tracking the periphery of the site. There is a public sewer crossing part of east/south-east part of the site. There are no internet lines on the site.

Care will need to be taken when developing proposals however it is unlikely that the limited number of underground utilities will need to be relocated. Any such relocation will of course carry a cost and therefore potentially pose a risk to development viability.

Cost estimates for any required relocations should be obtained once development proposals have progressed to an appropriate level however given the limited amount of underground utilities on site, no relocation/diversion costs have been included in our appraisals at this stage.

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Preliminary Arboricultural Assessment

Middlemarch provided an arboricultural assessment which surveyed the trees on site to aid design and avoid unnecessary tree removal.

Trees were assessed and assigned a category of either U, A, B or C which related to the quality and life expectancy of the trees. The trees recorded on site were predominantly low-quality self-set specimens which situation in clusters across the site. None of the trees are subject to a tree preservation order, nor are they in a conservation area or considered as ancient woodland.

A number of key recommendations were made as follows:

- The retention of Category B trees across the site should be considered a priority.
- The retention of Category C trees across the site should be considered where possible.
- Where required by the Local Authority a Capital Asset Valuation of Amenity Trees assessment should be undertaken to attribute the monetary value for each tree.
- All new development should be located outside of the root protection areas or canopy spread of any retained tree.
- Any proposed new planting should consist of a mix of ornamental, native and wildlife attracting species.
- An updated preliminary arboricultural assessment is recommended after a period of 12 months from the date of this assessment.
- If works take place during the bird breeding season, usually from March to September inclusive, trees should be checked for nesting birds.

More generally it was advised that the removal of trees across the site should be minimised, and new tree planting should be provided to adequately mitigate any essential tree loss.

Preliminary Ecological Appraisal

An assessment was undertaken by Middlemarch to ascertain the potential ecological constraints and opportunities associated with future redevelopment works at the site.

The report noted various protected/notable species within close proximity to the site as well as the extent and ecological condition of the various habitats on site (e.g. Marshy grassland, broadleaved plantation woodland). Local priority species (including bats and great crested newts) should be considered in the development of any future proposals to ensure habitat areas make a positive contribution toward these target species.

Additional surveys have been recommended in order to determine the status of protected/notable species on site and the extent they are likely to be affected by any future development as follows:

- Great Crested Newt Habitat Suitability Index Assessment and eDNA analysis of the onsite pond
- Botanical Survey (with a focus on marshy grassland habitat)
- Bat Surveys (scope dependent on agreed quantum of development)
- Reptile Survey =
- Invertebrate Habitat Assessment.

It is recommended that these surveys are only commissioned once a clear route forward has been selected and development programmed, due to their limited period of validity.

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Services and Amenities	We understand that the site is located in an area served by mains gas, electricity, water and drainage. In the absence of third-party reports being provided to us, we have assumed that connection to mains services will be both possible and consistent with market pricing without the need for excessive costs for connection.

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Development Costs – Light Industrial and Land

Construction

CBRE have used BCIS figures / discussions with our cost consultancy colleagues to determine an estimate of build costs for the site for Scenario 1.

For Scenario 2 the purchaser has not provided us with any cost information for the offices but has provided information on the light industrial development. As per Scenario 1, for the offices we have sourced cost information using BCIS figures / discussions with our cost consultancy colleagues. For the light industrial we have adopted the costs as provided to us.

For the purpose of the valuation, we have adopted the following:

Scenario 1 - Light Industrial

- Build cost: £8,491,870 - £92.50 per sq ft
- Contingency: £254,756 - 3.00% of construction cost
- Design Allowance Prelim Overheads: £1,358,699 – £14.80 per sq ft
- Total: £110.08 per sq ft
- Biodiversity Net Gain: £500,000

We have not been provided with a cost assessment for the proposed office development, as this includes both landlord Cat A costs and also fit out works (Cat B) costs which are specific to the owner occupier and wouldn't be included in a residual valuation.

Scenario 2 – Offices

- Build cost: £9,184,500 - £195.00 per sq ft
- Contingency: £275,535 - 3.00% of construction cost
- Total: £200.85 per sq ft
- Biodiversity Net Gain: £345,000 (pro-rata costs for part of the site)

We have been provided with a total cost plan for the light industrial scheme prepared by the Purchaser. The total Cost of Construction includes Build Cost, Contingency, Preliminaries of £2,911,398, which reflects £116.45 per sq ft. The purchaser has also provided the following additional commentary in relation to the estimated costs of construction.

"*CBRE notes that our build-cost estimate sits above the BCIS mean and upper quartile, and requests justification in terms of planning and specification requirements.*

Our position reflects the sustainability and specification standards now expected by Bury Council. The emerging Local Plan and Places for Everyone framework set out clear requirements for high-quality, energy-efficient development – including aspirations for BREEAM "Excellent", EPC A, EV charging, and sustainable drainage. The site also falls within the Northern Gateway allocation, which mandates alignment with a detailed masterplan and infrastructure delivery strategy. As such, our cost plan includes premium allowances for elevated spec – including environmental performance, enhanced amenity areas, and external works.

A Stage 1 ground investigation has already been completed, and a pre-application meeting with planning officers has been paid for and is currently being scheduled. We expect this to confirm the anticipated quality, and sustainability benchmarks the scheme will need to meet. In our view, this provides a clear rationale as to why the cost plan sits above BCIS median figures, and closer to the upper quartile when abnormal costs are factored in."

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In accordance with your instructions, we have adopted the costs provided by the Purchaser within our assessment of Scenario 2.

Scenario 2 – Light Industrial

- Build cost: £2,911,398 (inclusive of contingency and Design Allowance and Prelim Overheads) - £116.45 per sq ft
- Biodiversity Net Gain: £155,000 (pro rata cost for part of the site)

We have adopted the purchaser's cost plan for Scenario 2 – Light Industrial, which is above mean BCIS market pricing for similar multi-let development.

We would recommend that as part of any future analysis of potential overage payments that a full cost analysis is provided to the Council prior to practical completion of the proposed development. This should include costs which are separated between the office and the light industrial developments with specific reference to the additional site-specific costs of Ground Improvement, Capping Layer, PV Panels, Amenity Blocks and Biodiversity Net Gain.

For reference, the Purchaser has made the following comments in relation to site-specific costs which are detailed as follows:

- ***Ground Improvement (£253,789):*** *The site is brownfield and underlain by made ground and compressible material in parts. This is consistent with historical land use and broader investigations into the Northern Gateway zone, which highlight land stability and contamination risks. Our cost plan includes allowances for piling or sub-base treatment as a necessary abnormal.*
- ***Capping Layer (£49,459):*** *There are likely contamination issues on-site, particularly given proximity to former bleach works and infilled quarries. Our capping layer allowance reflects standard remediation requirements and is consistent with guidance for making such sites suitable for light industrial end use.*
- ***PV Panels (£142,884):*** *Inclusion of PV is necessary to meet anticipated sustainability objectives. Bury Council and GMCA policy frameworks both encourage integration of low-carbon energy. While PV is not currently a building regulation requirement, it is commonly secured via planning and is essential to achieving EPC A or BREEAM "Very Good/Excellent". This should be treated as an over-spec item, relative to BCIS median shell-only costs.*
- ***Amenity Blocks (£440,000):*** *The scheme is being brought forward as a multi-let, not a single unit. "Amenity blocks" refers to the internal fit-out for each unit – including WCs, small office space, kitchenettes, and DDA-compliant access. These are often required to make smaller units lettable and go beyond the statutory welfare provision assumed in base BCIS rates. We have not included any speculative Cat B fit-out but have allowed for these basic letting-ready works across the block. This is typical in multi-let industrial developments and supported by market precedent.*

The total cost of construction provided by the Purchaser is therefore reported to be £3,797,530.

Planning

We detail some costs associated with Biodiversity Net Gain (BNG).

In accordance with the principles of the Environment Act 2021 and the Biodiversity Gain Requirements (Irreplaceable Habitat) Regulations 2024, all development from January 2024 is required to secure an overall biodiversity net gain (BNG) of 10%.

Middlemarch undertook a habitat survey and condition assessment to determine the total Habitat Baseline for the site which has a value of 25.79 biodiversity units (BU). The key

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component of the Habitat Baseline score is the 'marshy grassland' which equates to a BU value of 16 as shown in the below table.

Phase 1 Habitat	Metric Equivalent	Area (ha)	Description (distinctiveness, condition and strategic significance)	Value (BU)
Broadleaved plantation woodland	Other woodland: broadleaved	0.12	Medium distinctiveness. Poor condition. High strategic significance due to location within a 'Tree Planting Opportunity Area'.	0.55
Dense scrub	Mixed scrub	0.49	Medium distinctiveness. Moderate condition. Low strategic significance.	3.92
Marshy grassland	Other neutral grassland	2.00	Medium distinctiveness. Moderate condition. Low strategic significance.	16.00
Poor semi-improved grassland	Other neutral grassland	0.12	Medium distinctiveness. Poor condition. Low strategic significance.	0.48
Standing water	Ponds (priority habitat)	0.43	High distinctiveness. Poor condition. Low strategic significance.	2.58
Scattered trees (4 x large trees)	Urban tree	0.15	Medium distinctiveness. Good condition. High strategic significance due to location within a 'Tree Planting Opportunity Area'.	2.07
Scattered trees (4 x small trees)	Urban trees	0.02	Medium distinctiveness. Moderate condition. High strategic significance due to location within a 'Tree Planting Opportunity Area'.	0.18
Scattered scrub	N/A	N/A	N/A	-
Total Area (ha)		**3.33**	**Total Habitat Baseline (BU)**	**25.79**
Total Area (excluding area of individual trees)		**3.16**		

A further assessment has also been undertaken based on the indicative schemes, which each have a score in the order of 14.4 BU to satisfy the 10% net gain obligation. This is notably lower than whole site baseline due to the restricted (therefore smaller) development area, as well as the design brief seeking to target minimum intervention e.g. retention of Cat B trees and as a consequence the associated BU. The pond and woodland were assessed as being in 'poor' condition and as such provide an opportunity for on-site enhancement. Furthermore, the development boundary incorporates areas of 'green space', measured at close to 1.3 acres overall in both the indicative schemes, providing a potential opportunity for some on-site enhancement.

The part of the site which is constrained and as such deemed not suitable for development measures c.1.6 acres (excluding the pond) but is predominantly graded as 'moderate' condition and is therefore understood to not be cost effective to upgrade, i.e. it is cheaper to purchase off-site credits than to seek to enhance the existing biodiversity as enhancing grass above moderate can be challenging and would provide limited step change potential.

Overall, there will therefore be a BU loss arising from development, in addition to the biodiversity net gain obligation of 10%, the combined total of which is c.14.4 BU which will need to be replaced via an off-site contribution. There are three main offsetting options available:

1) Invest to enhance land held by Bury Council - generate an uplift in BU equivalent to the off-setting requirement. Identifying potentially suitable land is key, with low quality land providing the biggest opportunity for step change via enhancement. The cost of managing the habitat for the minimum 30-year period would also need to be calculated in addition to the initial investment to upgrade land.

2) Purchase market credits – pricing varies between providers but the current average is £35k per unit, which would equate to c.£500k based on the indicative development scheme.

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3) Purchase via statutory biodiversity credits scheme – this is deemed to be the 'last resort' option as it is the most expensive at c.£1+million based on current indicative prices published by Defra.

For the purpose of the valuation, we have assumed option 2 as the basis for the cost inputted into the appraisal as a Purchaser of the site is most likely to consider this option when preparing their bid for the site.

We have adopted costs of £500,000 for the whole site, with a pro-rata apportionment of £345,000 for the offices and £155,000 for the light industrial elements of Scenario 2.

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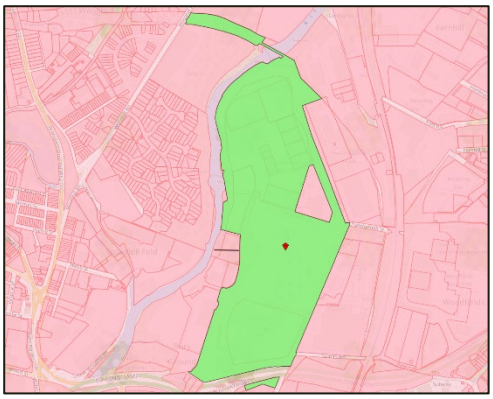
Investigations

Title & Tenure

CBRE have not been provided with a Report on Title or similar so have assumed that the property is held with good title without any onerous encumbrances or restrictions. If, in the future, we are provided with information which conflicts with this we will reserve the right to revise the advice given herein.

We understand from the Land Registry that the site is held freehold under title number GM859800. The site forms part of a larger area which includes Chamberhall Business Park to the north and Bury Police HQ to the south.

Below we detail the site itself and the extent of the freehold area referenced from the Land Registry. There is also a satellite view sourced from Google Maps with the site boundary marked with red outline and the approximate developable area shaded in blue.



Tenancies

The site is vacant and not subject to any occupational leases.

State of Repair

There are no buildings on the site.

Sustainability Considerations

In carrying out this valuation, we have considered the impact of sustainability factors on the property. Given the amount of data available, CBRE has chosen to focus on four key indicators which we believe are most the relevant for valuations. Based on our review of the planned development and our investigations, we summarise our findings as follows:

Indicator	Comment	Conclusions
Energy performance	The property is expected to have an energy performance rating of A/B. This will exceed the minimum requirements of MEES regulations, and an A or B rating is aligned to our Sustainability Index definition of efficient buildings.	The energy performance rating is expected to not only comply with current regulations but far exceed. As such we anticipate a positive influence on the marketability of the subject property.
Sustainability certifications	The property does not have any green certification or ratings.	This is in line with current market expectations for new build. certification is expected to have a positive influence on the

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	However, the developer is seeking a design reflecting BREEAM Very Good / Excellent	marketability of the subject property once developed.
Source of fuel and renewable energy sources	The property is heated/cooled using a combination of mains gas/solid fuel/oil/biomass and renewable sources of energy. To meet the UK Net Zero Strategy for clean energy by 2035, further decarbonisation will be necessary.	Only a small proportion of comparable properties have renewable sources of energy. As decarbonised energy sources have been introduced in advance of the 2035 target date, we anticipate a positive impact on the pricing decisions of prospective buyers.
Physical risk/ climate risk	There is a very low flood risk in the vicinity of the property, and therefore it is highly unlikely that the property would be significantly impacted during exposure to storm conditions.	A large proportion of comparable properties have similar exposure to climate risk and we are aware that similar mitigations are in place to minimise impact. There is therefore likely to be limited negative impact on the marketability of the property.

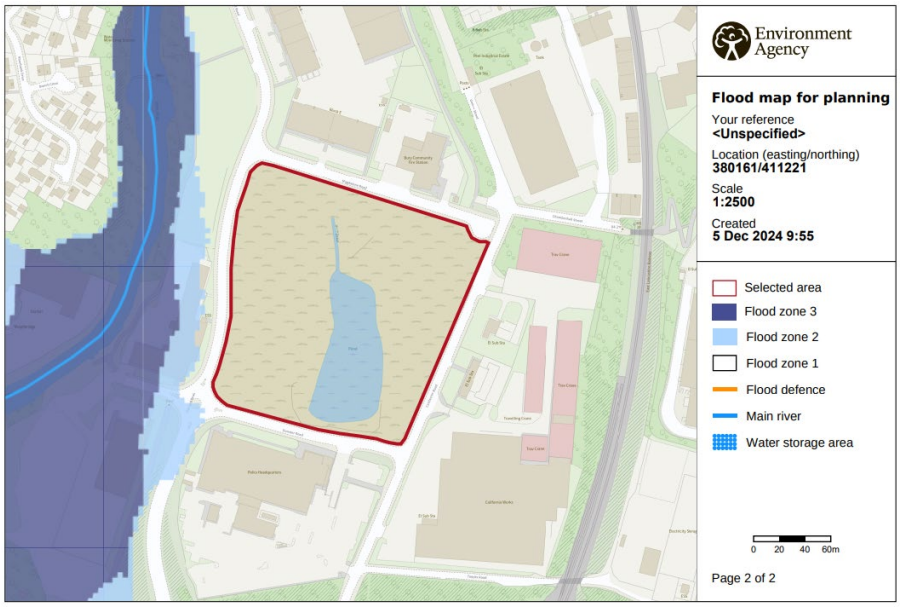
Hazardous and Deleterious Materials

We are not aware of any hazardous or deleterious materials and there are no buildings on the site.

We do not expect there will be any deleterious materials used in the construction of buildings forming the proposed development.

Flood Risk

The Site is situated in Flood Zone 1, an area that would have a low probability of flooding from river, sea and/or surface water (source: Environment Agency website).



Business Rates

The Property has not been assessed for business rates.

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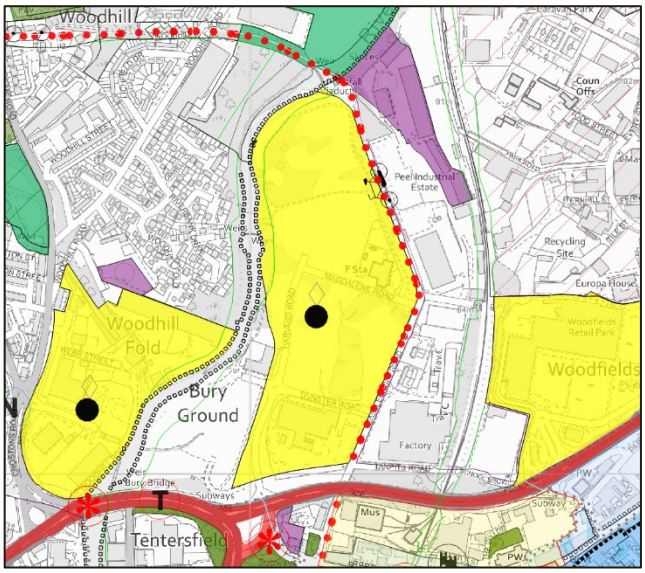
VAT	We have not been advised whether the Property is elected for VAT. All rents and capital values stated in this report are exclusive of VAT.
Energy Performance Certificates	The proposed development includes a specification that is consistent with a target EPC A or B rating and therefore should comply with new and emerging guidance on sustainability. However, there are currently no buildings on the site and the assessment will need to be completed post development.
Planning Policy	The Property is located within the jurisdiction of the Bury Council. Planning Policy is contained within the Bury Unitary Development Plan (UDP) which was adopted on 29 August 1997. The Council is currently working to replace the UDP with a new Local Plan. The online policies map shows that the subject site is allocated in the following areas under the Bury UDP as indicated by the yellow shaded area on the plan below: – EC1/3/2 - Employment Land: Business, Offices and Hotel – RT4/3/2 - Visitor Accommodation Provision – RT4/3 - Recreation and Tourism 
Planning Applications	Below we detail the most pertinent planning applications relevant to the land and surrounding infrastructure. - Ref: 63185 (Land at Chamberhall, Magdalene Road, Bury, BL9 0ES) | Hybrid planning application comprising: A full planning application for 5 buildings of up to 12,317 square metres to be used within Use Classes B1, B2 and B8 and associated works to include an access road, landscaping, car parking, servicing areas (Phase 1); and site preparation works, access, boundary treatments and associated works including engineering works (Phase 1a); and engineering works comprising site preparation works (Phase 2). An outline planning application for development within Use Classes B1, B2 and B8 (Phase 1a) including details of access (all other matters reserved); and for development within Use Classes A1, A3, A4, A5, B1, B2, B8, C1 (hotel), D1 (creche) and D2 (gym), including details of vehicular access (all other matters reserved) (Phase 2) | Approved with conditions: 07/02/2019

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- Ref: 51242 (Chamberhall Business Park, BL9 0LN) | 500 metres of highway with 2x 3.65m wide lanes and 3.0m wide footways | Approved with conditions: 17/06/2009
- Ref: 50163 (Chamberhall Business Park, Castlecroft Road, Bury) | Restoration of open water course landscape feature, to include suds regime wildlife habitat improvement and creation of earth bund from excavation arisings to enclose and screen developments from neighbouring public highway | Approved with conditions: 18/09/2008
- Ref: 48660 (Bury Ground, Castlecroft Road, Bury) | 200 metres of highway with 2 x 3.65m wide lanes and 3.0m wide footways | Approved with conditions: 21/12/2007
- Ref: 47422 (Bury Ground, Carlyle Street, Bury) | Access road from Peel Way to Bury Ground; perimeter road from Castlecroft Road to join access road | Approved with conditions: 28/03/2007

We are aware the most pertinent application for the property was under reference: 63185 approved in 2019. This was proposing business and light industrial uses. The application states that the design principles of development will incorporate new artwork to create a new component of the Irwell Sculpture Trail. Phase 1 of the wider masterplan has now been built out and was completed in 2020 by St Modwen Developments.

Outline planning permission was secured for a further two phases comprising Phase 1A to the north-west of the appraisal site, and Phase 2 which covers the appraisal site itself. The uses approved as part of the outline permission for the appraisal site are identified as Use Classes A1, A3, A4, A5, B1, B2, B8, C1 (hotel), D1 (creche) and D2 (gym).

Condition 42 of this hybrid planning permission stipulates that applications for approval of reserved matters must be made not later than five years from the grant of planning consent. The Decision Notice was issued on 07 February 2019, meaning an application for reserved matters must be brought by 07 February 2024 and therefore the site will need to obtain planning permission again.

The Purchaser (Crown Oil and Gas) are proposing to submit a new planning application in accordance with the plans provided. The proposals are consistent with the planning policy for the site and previous applications, and it is assumed for the purpose of the valuation that planning consent for the proposed development would be forthcoming.

Listing / Conservation Area	There are no buildings on the site. The site is not located within a conservation area.
Highways	Harvard Road has mixed maintenance responsibility. Dunster Road, Castlecroft Road and Magdalene Road are maintainable at public expense.

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Market Commentary

Key Market Messages - Industrial

North West Industrial Market

Key markets:

The North West is one of the most successful and dynamic regions in the UK and benefits from excellent proximity to growing markets, a rising population of over 7 million people and continued investment into the region's infrastructure. Large projects such as Liverpool 2, The Mersey Gateway Project and the proposed new Terminal 1 at Manchester Airport will only drive economic development. The North West provides a number of established industrial locations with the prime locations being located close to the M6 motorway, namely Warrington, Haydock and Birchwood. These locations also benefit from being located approximately a 4-hour drive from Glasgow and Edinburgh, making it a popular location for operators transporting goods south from Scotland. Warrington and Birchwood have historically always been popular industrial locations due to their strong links to the national and regional motorway networks and with the Omega North and Omega South developments just off junction 8 of M62, Warrington is now the premier distribution location in the North West. Omega provides ultra-prime large-scale distribution accommodation of very high quality and is home to occupiers including Iceland, Royal Mail, Home Bargains, The Hut Group, Evri, UPS and Amazon. Headline rents at Omega are now reaching in excess of £118.40 per sq m (£11.00 per sq ft). The other areas of Warrington, such as Winwick and Birchwood have historically provided smaller scale industrial accommodation, including many multi-let estates, with rents regularly achieving in excess of £102.26 per sq m (£9.50 per sq ft). Recent lettings in Warrington include:

Unit 49, Melford Court, Hardwick Grange, WA1 4RZ: 432.8 sq m (4,659 sq ft) refurbished prime industrial unit let to PCT Performance Chemicals GmbH in June 2025. The unit was let on a 10-year term with a 5-year break and 5 month rent free incentive. The headline rent reflected £152.52 per sq m (£14.17 per sq ft).

Unit 35, Melford Court, Hardwick Grange, WA1 4RZ: 467.1 sq m (5,028 sq ft) refurbished prime industrial unit let to PMP Fabrications Ltd in February 2025. The unit was let on a 5-year term with a 3 year break. The headline rent reflected £137.02 per sq m (£12.73 per sq ft).

The other dominant industrial location in the region is Trafford Park, situated on the outskirts of Manchester city centre. Trafford Park has by far the largest concentration of manufacturing and warehouse space covering over 1,200 acres and is particularly popular with firms from the manufacturing and engineering sector, with demand mainly concentrated in small to medium sized units across a number of multi-let estates. Whilst not a major distribution location due to urban congestion, a number of logistics warehouses do exist for key occupiers including Adidas, Amazon and XPO Logistics. Existing stock in prime locations such as Trafford Park has continued to suffer from the lack of new build and second-hand refurbished stock, and this shortage within the estate has resulted in significant rental growth across all size bands. Headline rents have regularly achieved in excess of **£134.55 per sq m (£12.50 per sq ft)** typically in size bands less than 929 sq m (10,000 sq ft).

Key lettings within Trafford Park include:

- **Unit 7, Westbrook Estate, Trafford Park**: 664.0 sq m (2,482 sq ft) a second hand refurbished industrial unit let to AMW Hydraulic Solutions in April 2025 with lease terms unknown. The headline rent reflected £145.31 per sq m (£14.00 per sq ft).

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- **Unit 15, Westbrook Estate, Trafford Park**: 664.0 sq m (2,500 sq ft) a second hand refurbished industrial unit let to Parallel Carbon in April 2025 with lease terms unknown. The headline rent reflected £145.31 per sq m (£15.00 per sq ft).
- **Unit 5, Ashburton Park, Trafford Park**: 1,162.20 sq m (5,004 sq ft) a second hand refurbished industrial unit let in April 2025 to Insulated Render Systems for £172.22 per sq m (£13.07 per sq ft).
- **Unit K4, Ashburton Point, Trafford Park**: 664.0 sq m (7,147 sq ft) a modern industrial unit let to Lindab in October 2024 on a 10-year lease at a headline rent of £145.31 per sq m (£13.50 per sq ft)
- **Unit 16, Bridgewater Point, Trafford Park**, M32 0QP: 1,162.20 sq m (12,553 sq ft) a speculative detached new build unit let in Q4 2024 to Vodafone for £172.22 per sq m (£16.00 per sq ft)

Other notable lettings within the **Greater Manchester** area in Q1 and Q2 2025 include:

- **Unit D Broadheath Network Centre, Altrincham**: 841.24 sq m (9,055 sq ft) let to Tyson Lighting Limited starting in April 2025 at a headline rent of £150.70 per sq m (£14.00 per sq ft) on a 10-year term with a break in year 5 and a 14-month half rent incentive.
- **Unit 1, Trade City, Manchester**: 348.11 sq m (3,747 sq ft) let to Flooring Warehouse starting in April 2025 at a headline rent of £200.21 per sq m (£18.60 per sq ft) on a 10-year term with a 5-year break and 12 month rent free incentive.
- **Unit C15 Broadheath Network Centre, Altrincham**: 232.07 sq m (2,498 sq ft) let to Orbis Project Limited starting in March 2025 at a headline rent of £177.60 per sq m (£16.50 per sq ft) on a 6-year term with a break in year 3 and a 10-month half rent incentive.

Liverpool and the wider Merseyside locality also has a strong industrial market within the manufacturing, warehousing and distribution sectors, having historically developed around the Port of Liverpool. Liverpool benefits from access to the M62, M57 and M58 motorways in addition to key freight rail hubs which are situated within Widnes, Speke and North Liverpool. Also, the ongoing development of the Port of Liverpool has seen the opening of the new deep water container terminal within the last 5 years. Key locations within the Liverpool City Region include the Port of Liverpool, Knowsley, Speke-Garston, Widnes, Runcorn and Bromborough on the Wirral. Key industrial occupiers within the Liverpool City region include Jaguar Land Rover, Cammell Laird, Glen Dimplex, AstraZeneca, B&M Bargains, Home Bargains, Matalan and Communisis. Current headline rents for good quality industrial units in the small-to-mid box size range are typically around **£86.11 per sq m (£8.00 per sq ft) to £107.64 per sq m (£107.64 per sq ft).**

There has been limited transactional evidence in Liverpool in the previous quarter. We detail lettings within the Liverpool area in Q1 2025 and 2024:

Unit 36, Ferriers Way, Liverpool: 92.06 sq m (991 sq ft) unit let to Diamine-Speciality Inks in February 2025 at a headline rent of £139.93 per sq m (£13.00 per sq ft).

Unit 52 Farriers Way, Liverpool: 92.5 sq m (996 sq ft) unit let to TVW Carpet & Upholstery Cleaners Ltd in October 2024 at a headline rent of £129.71 per sq m (£12.05 per sq ft on a 2-year term subject to 6 months' half rent.

Unit 15, Britonwood Trading Estate, Knowsley: 513.01 sq m (5,522 sq ft) unit let to Forestore Company Limited in October 2024 at a headline rent of £77.93 per sq m (£7.24 per sq ft) on a 3-year term.

Unit 54 Farriers Way, Liverpool: 92.5 sq m (996 sq ft) unit let to Sandu Salon Service Ltd in April 2024 at a headline rent of £129.71 per sq m (£12.05 per sq ft) on a 5-year term with 3-year break, subject to 6 months' half rent.

Other notable, but considered more secondary, industrial locations in the North West include Heywood, Crewe, Wythenshawe, Walton Summit, Winsford and Middlewich. Rents in these locations vary considerably due to the variety of accommodation offered, both in size and quality. These locations generally provide older specification units interspersed with more modern accommodation.

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Demand & Take-Up:

There was no big box take-up in the North West region in Q1 2025, and there was a fall in space under offer, with 840k sq ft under offer at the end of the quarter across four deals.

During the quarter, North West availability increased by 7% to 5.0m sq ft, driven primarily by secondhand space. Approximately 60% of space available in the region is ready to occupy, up from 53% at the end of Q4 2024. As a result, North West vacancy rate grew by 71bps to 4.34%, but continues to be the lowest in the UK.

The North West prime rents grew by 55 pence during the quarter to £11.50 psf. There was no change to the region's prime yield, remaining stable at 5.25%

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Market Evidence

Rental Evidence – Industrial

We detail below occupational evidence for industrial properties within proximity to the subject.

Address	Size (sq ft)	Tenant	Date	Headline Rent psf)	Comments
Units 2 & 3, Dean Court, Chamberhall Business Park, Harvard Road, Bury, BL9 0ES	3,056 (Each)	Available	Available	£12.00	New build multi-let industrial estate directly facing subject site. Advised by acting agent, the site has interest on both Units 2 & 3 at quoting £12.00 psf (£36,600).
Unit 9, Peel Mills Industrial Estate, Bury	600	Branch Off Ltd	Oct-24	£12.00	5 year lease, 3 year break – Peel Mills Ind Estate is directly next to the subject site.
Unit 7, Peel Mills Industrial Estate, Bury	634	QA Optical (UK) Ltd	Oct-24	£11.36	5 year lease, 3 year break - Peel Mills Ind Estate is directly next to the subject site.
Unit 4, Peel Mills Industrial Estate, Bury	600	Nest Building Services Ltd	Aug-24	£12.00	5 year lease, 3 year break - Peel Mills Ind Estate is directly next to the subject site.
Unit 24, Peel Mills Industrial Estate, Bury	780	G & M Vendetti Compressors Ltd	Jun-24	£12.00	3 year lease - Peel Mills Ind Estate is directly next to the subject site.
Unit 19/20, Peel Mills Industrial Estate, Bury	6,000	Alan Howard (Stockport) Ltd	Mar-24	£7.50	5 year lease - Peel Mills Ind Estate is directly next to the subject site.
Unit 1, Peel Mills Industrial Estate, Bury	1,199	Four4 Season Events Limited	Jan-24	£9.00	3 year lease - Peel Mills Ind Estate is directly next to the subject site.
Various units at Whitegate Business Park, Oldham	2,000 – 3,500	Various	Q3 23 – Q2 24	£11.98 - £13.50	3 year leases – 4 separate leases / Estate is located in a good secondary location.
Various units at Stanley Green Trading Estate, Cheadle	3,200 – 13,900	Various	Q2 23 – Q1 25	£13.00 – £17.68	5 & 10 year leases - 8 separate leases / Estate is located in a good secondary location. Superior to subject.

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Address	Size (sq ft)	Tenant	Date	Headline Rent psf)	Comments
Various units at Tameside Business Park, Denton	1,200 – 2,450	Various	Q4 23 – Q3 24	£10.00 – £12.50	5 year leases - 4 separate leases / Estate is located in secondary area.
Unit D1 and F2 at Roundthorn Industrial Estate	7,300 – 7,900	Various	Q4 23 – Q1 24	£11.00 - £12.20	3 and 10 year lease – Secondary location. Older estate.
F2 Multiply, Logistics North, Bolton	32,595	Howarth Air Technologies	Sep 24	£11.00	10 year lease, rent free unknown
Unit 3A Towngate Business Centre, Walkden	9,860	SpaMedica	Jul 24	£12.50	10 year lease with 6 months' rent free
Unit 3E & 3F Towngate Business Centre, Walkden	17,840	Likewize Group	Mar 24	£13.00	10 year lease with 6 months' rent free
Unit 5 Foundry Business Park, Salford	4,379	Edco Eindhoven BV	Feb 25	£15.30	Terrace of newly completed units, letting for a new 10 year lease
Unit 12 Oakhill Trading Estate, Walkden	8,966	Jap Part Europe	Sep 24	£11.00	New 6-year lease with six months' rent free

Conclusion

The letting evidence above demonstrates headline rents between £7.50 - £19.46 per sq ft for properties in both direct proximity to the subject and in the wider North West industrial market. Recent letting evidence from the locality is demonstrated on Peel Mills Industrial Estate, located directly north of the site on Chamberhall Street. The estate comprises 39 industrial units ranging in size from 600 - 39,900 sq ft and is a circa 1990's estate. Larger units on the estate reflect a £/psf rate at the lower end of the comparable evidence, with smaller units on the estate reflecting a rate at the higher end reflecting a typical quantum scenario reaching up to £12.00 per sq ft.

Any new build accommodation at the subject site would trade at a premium level in comparison to these comparables reflecting a new build premium.

The transactions at Whitegate Business Park, Oldham; Logistics North, Bolton; Towngate Business Centre, Walkden and Foundry Business Park, Salford all reflect rental levels which are more consistent with new build estates with evidence ranging between £10.00 - £15.30 per sq ft. We widened our search to areas in south Manchester, including Denton (Tameside Business Park) and Wythenshawe (Roundthorn Industrial Estate) and Stanley Green Trading Estate, Cheadle. Tameside and Roundthorn reflect more secondary estates in comparison to the subject which will be newly constructed providing either modern or refurbished units arguably in more established industrial locations although the subject being a new build estate will balance out these factors. The values on these estates range from £10.00 - £17.68 per sq ft showing a slight premium for south Manchester.

We have also spoken with local agents in Bury who are actively marketing Units 2 & 3, Dean Court, Chamberhall Business Park facing the subject on Harvard Road. We were advised there is interest for both units at the quoting headline rent of £12.00 per sq ft. We are of the opinion that new build industrial on the subject site would be seeking a headline rental of £12.50 per sq ft which is consistent with new build stock in the surrounding area. We therefore believe the estate would have a good level of demand if developed in accordance with the proposed plans.

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Investment Evidence – Industrial

We have searched for vacant possession sales in the market but note the strength of the occupational market means there are few transactions and none that we would consider to be directly comparable to the subject premises. Consequently, we have undertaken an investment valuation for the subject premises assuming that a purchaser would undertake a marketing period to let the property and then dispose of the property as an investment.

Below we detail a list of recent comparable investment transactions used to determine the market yield for the property.

Property Address	Date	Area (Sq Ft)	WAULT (Years)	Passing Rent £ pa	Purchase Price £ Capital Value) Yield	Analysis
Units 1-4 Europa Way, Trafford Park, Manchester, M17 1JZ	Feb-25	45,271	3.40	£402,450 (Average £8.89 psf)	£9.65M (£213.16 psf) **3.91% NIY** 5.85%EQY	Reversionary estate in prime location. Advised due to complete 20/02/25 above quoting price. Superior in comparison to subject.
Units 1 – 5, Dane Road Industrial Estate, Sale, M33 7BH	Jan-25	28,294	0.91	£260,460 (Average £9.20 psf)	u/o £3,490,000 u/o (£123.35 psf) **7.01% NIY** 7.74% EQY	Reversionary value add opportunity located in superior location. Close to exchanging at quoting price.
Units 415-428 Oakshott Place Walton Summit, Preston PR5 8AT	Jan-25	76,185	1.50	£485,382 (£6.37 psf)	£7,630,000 (£100.15) **5.96% NIY** 7.46% RY	Reversionary value add opportunity located in superior location.
Premier Park, Acheson Way, Trafford Park, Manchester, M17 1GA	Oct-24	196,680	3.30	£1,665,015 (Average £8.47 psf)	£46,900,000 (£238.46 psf) **3.32% NIY** 4.80 EQY	Superior in comparison. Super prime asset in strongest North West location.
Melford Court Industrial Estate, Hardwick Grange, Warrington, WA1 4RZ	Sept-24	155,497	3.06	£1,493,538 (Average £9.60 psf)	.£24,335,000 (c.£156.50 psf) **5.75% NIY** 6.40% EQY	Superior location in comparison. Good quality asset in strong North West location.
Units A, C & D Kingsway Business Park, Rochdale, Greater Manchester, OL16 4UG	Aug-24	166,152	5.47	£1,218,206 (Average £7.33 psf)	£22,000,000 (£132.41 psf) **5.21% NIY** 5.93% EQY	Superior in comparison. Strong secondary asset in good North West location.
Stockport Trading Estate, Yew Street, Stockport, SK4 2JZ	Mar-24	168,546	4.10	£1,272,185	£23,800,000 (£141.20 psf) **5.00% NIY** 6.20% EQY	Superior location in comparison to subject. Inferior unit specification.
Astmoor Industrial Estate, Arkwright Road, Runcorn, WA7 1NU	Dec-23	67,149	1.81	£324,588 (ERV £407,646)	£3,555,000 (£52.94 psf) **8.57% NIY** 10.77% RY	Inferior overall specification, location, age and offering on units.

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Property Address	Date	Area (Sq Ft)	WAULT (Years)	Passing Rent £ pa	Purchase Price £ Capital Value) Yield	Analysis
Reads Road, Fenton, Stoke-On-Trent, ST4 2RL	Sept-23	27,726	1.37	£233,091 (ERV £267,564)	£2,990,000 (£107.84 psf) **7.32% NIY** 8.41% RY	Inferior overall specification, location, age and offering on units.

Below we outline CBRE's house view on Prime Estates, Good Secondary and Secondary Estates. The subject property would be considered a good secondary / secondary location from an industrial perspective although various factors such as age, specification, term certain, tenant covenant and other factors are considered on top of location to determine our chosen yield profile.

Industrial Yields	Jan 25	Mar 25	Apr 25	May 25	Jun 25	Trend
Prime Estate	5.25%	5.25%	5.25%	5.25%	5.25%	Stable
Good Secondary	6.50%	6.50%	6.50%	6.50%	6.50%	Stable
Secondary Estates	7.50%	7.50%	7.50%	7.50%	7.50%	Stable

Conclusion

The evidence above demonstrates net initial yields ranging between 3.32% and 8.57%, reflecting variances in income profile, tenant strength, term certain, specification and location. We have also considered equivalent yields given the reversionary nature of the current industrial market. These demonstrate a range between 4.80% and 8.57..

Units 1-4 Europa Way and Premier Park in Trafford Park reflect superior assets with strong tenants in prime locations in the North West region. Equivalent yields range from 4.80% – 5.80%. We expect the subject to trade at a discount in comparison. We would also expect the same with Units A, C & D at Kingsway Business Park where pricing reflected 5.93% EQY.

Stockport Trading Estate offers a good comparable in terms of location trading at a 6.20% equivalent yield. This estate would be considered to be in a slightly superior area, with reasonable specification. We would however expect a premium at the subject reflecting its new build specification.

For the purpose of the valuation we have adopted and equivalent yield of 6.00%, which reflects the assumption the units will be newly constructed and fully let.

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Market Commentary

Key Market Messages - Offices

Take up

Bury is situated within the Greater Manchester conurbation, Bury town centre is too small to have its own office market and occupiers seeking office accommodation extending to over 40,000 sq ft would typically be looking within the wider North West or Greater Manchester conurbation. Manchester city centre has a well-established office market, and it is not comparable with Bury therefore we have given consideration to the market information for the out-of-town sub-markets of Salford Quays,Trafford and South Manchester when reporting on market dynamics.

Below we outline data from both MOAF (Manchester Office Agents Forum) and commentary from Property Market Analysis' (PMA) report for Manchester out of town market report.

According to MOAF take up of Manchester's Out of Town market, (which includes the submarkets of both South Manchester and Salford Quays) reported take up for the first half of 2025 is reported to be 387,581 sq ft which is strong in comparison to total take up in 2024 of 489,000 sq ft. 2024 was 24.7% below the five-year average of 649,420 sq ft. By contrast, take up in 2023 was 765,394 sq ft being 17.85% above the five-year average, and take up for the first half of 2025 is tracking at 15% above the five year average (over a six month period).

The reduced level of take up in 2024 was a result of an absence of large-scale deals, with demand focused solely on the smallest size bands. Manchester out of town saw its largest deal occur at Nexus in Trafford, where private housing association L&Q Group let 18,000 sq ft. They relocated to the top two floors from their nearby offices in Sale.

On further analysis of take up in the out-of-town markets, we see the shortage of larger lettings those over 20,000 sq ft which was a key differentiator between levels of take up between 2023 and 2024. In Salford Quays, lettings under 10,000 sq ft accounted for 51% of deals in 2023 and lettings over 20,000 sq ft accounted for 38% of total volume. However, in 2024 lettings under 10,000 sq ft accounted for 82% and there were no lettings over 20,000 sq ft. Similarly in the South Manchester sub-market, in 2023 lettings under 10,000 sq ft accounted for 69% of the market and 18% for lettings over 20,000 sq ft but in 2024, 91% of the market was for lettings under 10,000 sq ft and again there were no lettings over 20,000 sq ft.

To date, take up in 2025 has been significantly bolstered by a pre-sale deal from the Government Property Agency to build their Manchester Digital Campus on Great Ancoats Street. The campus is set to total around 900,000 sq ft across two buildings and will bring 7,000 civil service jobs to Manchester in the coming years. However this transaction relates to future development on the edge of Manchester city centre, which is still currently undeveloped land.

Vacancy and Availability

As at Q4 2024 (latest available), total availability for Manchester's out of town market equates to 9.5% according to PROMIS, and this is consistent with data for Top 6 Major Regional Cities. Vacancy in the Manchester Out of Town market is considered to be reasonable as there has been limited new build activity providing new stock to the market over the last few years. In terms of wider context, availability stood at 15.2% in 2012 (the highest recorded over the last 25 years) with a fair proportion relating to secondary stock in Salford Quays, and the low point for vacancy was in the year 2000 at 7.6%.

The graph below shows data from PROMIS and compares availability for Manchester's Out of Town market over the last five years in comparison to the Top 6 regional cities and shows there has been a consistent level of vacancy in Greater Manchester when compared with similar out of town regional markets.

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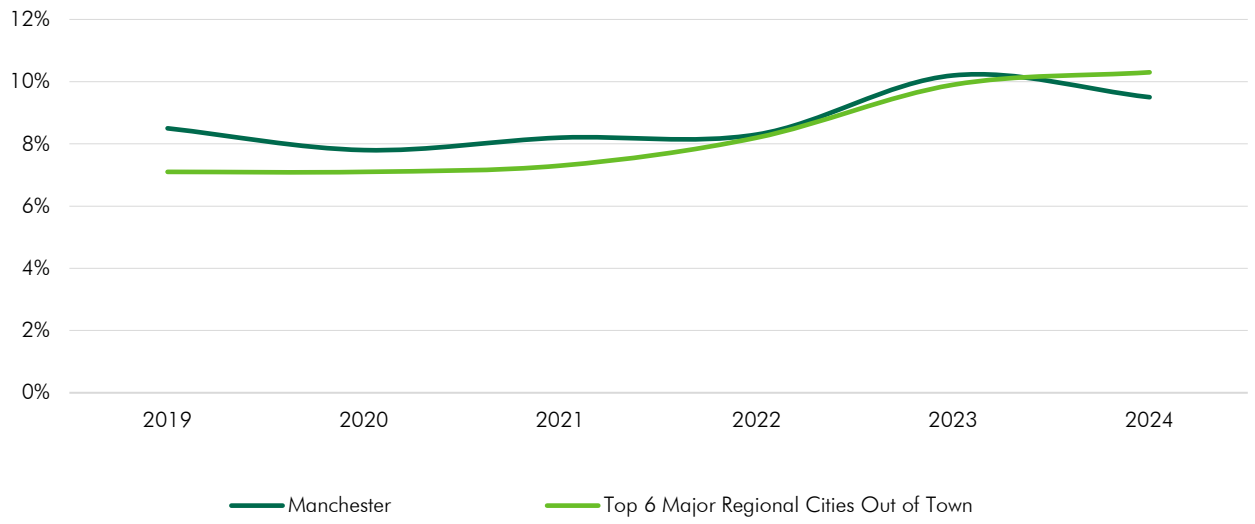

The biggest impact on availability was the latest phase of Stockport Exchange (65,000 sq ft) . The third building at Stockport Exchange follows the success of No 1 and No 2 developed in 2019 and 2021 respectively. Hurst Accountancy were the first occupier for the latest development, joining other occupiers BASF, Music Magpie, Patient O'Neill and Stagecoach. Elsewhere, Foundation on 2 George Street in Altrincham was forward marketed with around 37,000 sq ft available as of end-2023 following a deal to Sportfive which was let during construction.

In terms of the secondary market there is availability at Scotscroft House and Towers Business Park as a number of firms consolidating their operations including Oracle and John Lewis. Space was also made available at 4M, Manchester Airport for similar reasons, with The Hut Group in particular consolidating to their HQ. The largest deal to erode existing space saw Express Solicitors buy 40,000 sq ft in Wythenshawe. Other key schemes which are under construction include new developments by Bruntwood Sci-Tech at Manchester Science Park, Greenheys Building and Citilabs 4.0. Citilabs 4.0 is speculative development of 125,000 sq ft and is due to reach practical completion in April 2025, and Greenheys Building 131,000 sq ft is part let to UK BioBank and under construction due for completion in late 2026.

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Market Evidence

Rental Evidence - Offices

Below is a schedule of lettings over the last 24 months within Greater Manchester (excluding Manchester City Centre) for offices over 10,000 sq ft.

Date	Property	Sq Ft	Grade	Tenant	Rent / Price (per sq ft)	Comments
June 2025	Lakeside 500, Cheadle Royal	12,000	Grade B Refurb	Together Money	£24.00	
June 2025	Trafford Wharf Road	48,513	Grade B	Warner Brothers	£16.50	4 year lease break in year 2.
May 2025	Glasshouse, Alderley Park	16,107	Grade A	Currentbody	£23.00	10 year lease, break in year 7
April 2025	The Alex, Salford Quays	11,878	Grade B refurb	M&S	£20.00	4 year lease
September 2024	Base, Manchester Science Park, Greenheys Lane	36,399	Grade A New Build	Bolton University / UA92 partnership	£27.50	10-year lease
September 2024	Century House, Pepper Road Hazel Grove, Stockport	10,380	Grade B	Centre for Advanced Dental Technology	£15.00	
April 2024	Solutions House, Yew Street Stockport	12,000	Grade B	OFGL	£15.50	15-year lease
March 2024	Oakland House, Talbot Road, Old Trafford	11,000	Grade B	PH Media	£13.00	
March 2024	Nexus City Park, Salford Quays	18,043	Grade B	London and Quadrant	£14.15	16-year lease with break at year 11
January 2024	Egerton House, Towers Business Park, Didsbury	10,500	Grade A	Blume Group	£21.00	
December 2023	Three Stockport Exchange, Stockport	11,200	Grade A New Build	Hurst	£27.00	10-year lease
August 2023	Foundation 2 Stamford Square, Altrincham	13,600	Grade A Newly Refurbished	Sportfive	£25.00	Former department store newly redeveloped as offices
July 2023	St Albans House, Drake Street, Rochdale	9,648	Grade B	Rochdale Boroughwide Housing	£7.15	1990s offices let on 3-year lease
June 2023	Soapworks, Exchange Quay, Salford Quays	25,000	Grade A	Department for Levelling Up	£21.50	Formerly occupied by Secretary of State

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Date	Property	Sq Ft	Grade	Tenant	Rent / Price (per sq ft)	Comments
March 2023	Adamson House, Towers Business Park, Didsbury South Manchester	10,100	Grade A	BDW Trading	£28.00	5 years lease
March 2023	Valo Talbot Road, Old Trafford	36,164	Grade A Refurb	Bolton University / UA92 partnership	£16.50	15-year lease

Summary

The subject site is located in central Bury and extends to over 40,000 sq ft. There have been no lettings of this size within Bury or the wider out of town office market in Greater Manchester in the last 12 months. There is limited new build construction progressing as the viability of speculative schemes is not sufficient for most developers unless there is support from public sector grants / partnerships. New build activity at Base has been supported by Bruntwood Sci-Tech, a JV between Bruntwood, L&G and Greater Manchester Pension Fund. Equally, Stockport Exchange was developed by Stockport Council and Muse. Within Greater Manchester the best comparable for prime town centre office development would be Stockport Exchange where there has been construction of speculative offices completed over the last five years. The three phases of new build development have seen rents grow from £226 per sq m (£21.00 per sq ft) in 2021, to £290 per sq m (£27.00 per sq ft) by 2024.

Elsewhere within the region, Towers Business Park in Didsbury, arguably Greater Manchester's premier out of town business park, has seen growth from £242.20 per sq m (£22.50 per sq ft) in 2021 to £301.40 per sq m (£28.00 per sq ft) achieved at Adamson House. In Salford Quays/ Trafford Park, there has been lettings of new build and newly refurbished offices with prime headline rents showing £27.00 - £28.00 per sq ft showing consistency with the south Manchester market. Rental growth elsewhere has been relatively flat in the last five years, with limited transactions completing for lettings over 10,000 sq ft.

The subject property would offer new build offices which are assumed to be a Grade A specification, and we would expect the rental to be to the higher end of the range, similar to Stockport Exchange and Towers Business Park rather than the secondary refurbishments at Old Trafford and Salford Quays. We have reflected the new build specification, but inferior location and adopted a headline of £242.20 per sq m (£22.50 per sq ft). The proposed development therefore reflects a headline rent of £900,000 per annum once fully let.

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Investment Evidence – Office

We detail below investment evidence for office properties within the North West market.

Property Address	Date	Area (Sq Ft)	WAULT (Years)	Passing Rent £ pa	Purchase Price (£ Capital Value) Yield	Analysis
Waterside House, Standish Wigan	June 25	30,734	6.20 (2.80)	£392,096 £12.76	£2,900,000 (£94.36 psf) **12.67% NIY**	Multi-let offices, let to Tote, Walmsleys Insurance SSP Health Medical. Offered to the market in May 23 with limited investor interest initially but sold in June initial quoting price 11.00% yield
Unit 1 Kestrel Court, Lakeside Drive, Centre Park, Warrington, Cheshire, WA1 1QX **(Single let)**	Jan-25	11,365	5.20	£193,205 £17.00 psf	£2,000,000 (£175.98 psf) **9.09% NIY**	Secondary out of town location. Let to NHS undoubted covenant. 5.2 years to break / 10.2 years to expiry. Higher of OMRR or RPI uncapped review in January 2030.
Unit 2, Sceptre Point, Sceptre Way, Bamber Bridge, Preston, PR5 6AW **(Single let)**	Jun-24	19,475	4.40	£272,333 £13.98 psf	£2,726,000 (£139.97 psf) **9.39% NIY** **10.00% RY**	Secondary location. Good secondary industrial location. Let to NHS undoubted covenant until October 2028. October 2023 rent review has not been actioned. ERV assumed £15.00 psf.
300 Longbarn Boulevard, Birchwood, Warrington, WA2 0XD **(Single let)**	Jul-23	20,826	13.30	£312,390 £15.00 psf	£5,330,000 (£240.08) **5.86% NIY** **6.96% RY**	Secondary location. Let to National Crime Agency an undoubted covenant until May 2036. Reversionary ERV c.£19.00 psf. Current yields are between 50-100 bps softer in today's market from July 23.
Dow Chemicals, Cheadle Royal Business Park, South Manchester, SK8 3SR **(Single let)**	Jun-23	26,076	12.90	£558,548 £21.42 psf	£8,900,000 £341.31 psf **5.88% NIY** **6.74% EQY**	Good out of town location in South Manchester. Built 2020/21. 5A3 D&B covenant. Lease had no breaks with 5 yearly upward only compounded RPI rent reviews, subject to an annual cap and collar of 1% and 4%, Current yields are between 50-100 bps softer in today's market from June 23.
3 Christie Fields Office Park, West Didsbury, Manchester, M21 7QY **(Single let)**	Available	6,220	4.30	£82,600 £13.28 psf	Quoting £1,100,000 (£177 psf) **7.11% NIY** 9.11% RY	Secondary location. Let to low-risk tenant (Experian). 4.3 years unexpired. Superior location, smaller property. On market from June 2024.

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Property Address	Date	Area (Sq Ft)	WAULT (Years)	Passing Rent £ pa	Purchase Price (£ Capital Value) Yield	Analysis
Kier House, Estuary Business Park,4 Windward Drive, Speke, L24 8QR **(Single let)**	Available	20,000	7.50	£297,175 £14.86 psf	Quoting £3,950,000 (£197.50 psf) **7.05% NIY** 7.70% RY	Good secondary location. Built 2015. Let to strong tenant and Experian very low risk (Kier Ltd). RPI linked RR C&C 2-4%. Outstanding review April 2025.

Below we outline CBRE's house view on Regional Cities, Good Secondary and Secondary. The subject property would be considered a good secondary location from an office perspective.

Industrial Yields	Dec 24	Mar 25	Apr 25	May 25	Jun 25	Trend
Regional Cities	6.50%	6.50%	6.50%	6.50%	6.50%	Weaker
Good Secondary	10.00%	10.00%	10.00%	10.00%	10.00%	Weaker
Secondary	14.00%	14.00%	14.00%	14.00%	14.00%	Weaker

Conclusion

Regional city office comparables reflect yield profiles too strong for the subject, for example, those situated in Manchester city centre. We have therefore searched for investment evidence in secondary office markets across the North West region.

Transactions range from June 2023 to June 2025 and demonstrate yield profiles between 5.86% - 9.09% on a net initial yield basis. We have also considered available pricing with yields ranging between 7.05% – 7.11%. In addition to the yield, we have given consideration to the overall capital value and note these range between £140 - £341 per sq. ft.

The transaction of Unit 2 Sceptre Point, Preston provides recent evidence. The property is let to a strong covenant with a low passing rent and would be viewed as a reversionary investment with a term certain 4.40 years. An assumed ERV of £15.00 psf would reflect a reversionary yield close to 10%. We would anticipate a similar yield profile at the subject property.

The investments in Warrington, South Manchester and Speke are all considered stronger locations with better tenant covenant strength or good unexpired lease terms and reflect superior overall investments in comparison to the subject.

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Land Sales Evidence

From 2019 – 2022 there continues to be strong levels of demand for development land from industrial developers with yield compression and strong occupational demand driving forward new development for industrial stock and growth in land values across the North West region. Land values for industrial development had steadily increased from £500,000 - £750,000 per acre in 2015-2020, to over £1,000,000 per acre for oven ready sites, and even higher rates in prime markets of Warrington and Trafford Park.

However, since September 2022, the shift in interest rates and property market yields has led a significant downward impact on land values and the fall in pricing has resulted in limited transactional activity. Whilst pricing industrial investment stock has stabilised, the rising cost in debt finance, weaking of property yields and continued cost inflation (albeit at a reduced rate of inflation) for new build continues to impact on viability and there are few transactions taking place on which to determine land value.

Based on discussions with our industrial agency colleagues we understand land values to fall into the following £/per acre rates:

- Prime Site £1,000,000 - £1,400,000
- Secondary Site £400,000 - £750,000
- Tertiary Site £250,000 - £300,000

We detail below sales of vacant land or buildings which are planned for industrial development.

Address	Area (sq ft)	Transaction Date	Achieved Price	£/Per acre	Comments
Land At Firwood Industrial Estate, Thicketford Road, Bolton, BL2 3TR	2.97	Feb-24	£1,000,000	£336,700	Industrial Development Site with Planning Permission Granted industrial unit/Warehouse Facility. Net Developable Area c. 1.69 acres. 2.5 miles from M60, just outside of Bolton Town Centre. Regular shaped site in established employment area which includes a Huws Gray Builders Merchants, Boxes & Packaging Ltd and Hartech Automotive Ltd.
Kenwood Point, Reddish, Stockport	9.90	May-23	£11,250,000	£1,136,364	Former manufacturing facility extending to 50,000 sq ft of poor-quality accommodation. Site acquired for redevelopment by a data centre operator due to the existing power supply at the unit which offered 6,600kVA power supply and commanded a premium over and above alternative sites.
Levbec House, 99 Manchester Road, Stockport	0.36	Feb-23	£450,000	£1,250,000	Site of a former public house situated directly opposite a retail park anchored by Asda and Wickes. The site has planning consent for demolition of the pub and a new drive-thru restaurant. The pricing reflects the benefit of planning consent.

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Address	Area (sq ft)	Transaction Date	Achieved Price	£/Per acre	Comments
Broadway Green, Oldham	10.0	Jul-21	£6,500,000	£650,000	Land acquired by Chancerygate for a development of light industrial units, now completed. Site sold with the benefit of planning consent. An adjacent site was forward funded by Hines UK and developed by Chancerygate in April 2024, whilst the transaction is not reported pricing is understood to be in the region of £550,000 per acre for the development of small multi-let light industrial units.

We detail below sales of vacant land without the benefit of planning permission.

Address	Area (sq ft)	Transaction Date	Achieved Price	£/Per acre	Comments
Higher Bridge Street West Car Park, Bolton, Lancashire, BL1 2HE	0.21	Mar-24	£185,000	£880,952	Land previously used a car park – marketed as suitable for a variety of uses with no planning consent. Car park has not been used in a while and located on the periphery of Bolton Town Centre. Located in a commercial location.
Land At Pelham Street, Bolton, Lancashire, BL3 3JB	0.56	Mar-24	£210,000	£375,000	Land used as open grassland – marketed as suitable for a variety of uses with no planning consent. Located in a mixed-use area of commercial and residential use classes. 1.50 miles south-west of Bolton Town Centre.
Land At, Cedar Avenue, Horwich, Bolton, Lancashire, BL6 6EU	0.96	Jan-24	£610,000	£635,416	Land used as open grassland. Marketed between £350-£400k with no planning permission. Slightly sloping site located 4 miles west of Bolton Town Centre in well-presented area.
Land At Albion Street, Bolton, Lancashire, BL3 6ND	0.19	Mar-23	£110,000	£578,947	Two plots of land. Once used a car park with a neighbouring plot of land – marketed as suitable for a variety of uses with no planning consent. Located predominantly in a commercial area. Less than 1km to Bolton Town Centre.

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Valuation Conclusion

Valuation Approach

Valuation Methodology

In preparing our valuations, we have undertaken a residual appraisal of the proposed scheme.

Valuation Rationale

We consider the Market Value of the subject property is driven by its alternative use value as a light industrial development however we are aware the purchaser is proposing to develop an office building for owner occupation.

To assess this, we have adopted the following approach:

Scenario 1 – Light Industrial

We have adopted a scheme based on a light industrial development over the whole site using AEW Architect's design and indicative layouts for the development which suggests a developable site of 5.3 acres and a scale of development of 91,804 sq ft.

We have assumed costs for Biodiversity Net Gain (BNG) reflecting off site provisions at an estimate of £500,000 for the whole site, reflecting a pro rata rate of £94,000 per acre.

Scenario 2 – Office + Light Industrial

Office Development

The appraisal shows an office development for owner occupation. In accordance with the plan with which we have been provided, this extends to 3.67 acres and an office of 40,000 sq ft (NIA).

We have assumed costs for BNG reflecting off site provisions at an estimate of £345,000 for the pro rata portion of the site based on an overall cost of £500,000 for the whole site.

There is currently very limited speculative development of offices in the current market based on viability. This is consistent with our appraisal which shows the development is not viable and results in a negative land value. Assuming a market allowance for developer's profit and finance – even if the development can be financed by the owner occupier, it is still questionable in terms of viability.

Light Industrial Development

As the office area only covers 3.67 acres there is an additional 1.6 acres of land at the subject site. We understand that Bury Council have reached an agreement to dispose of this part of the site at a Market Rate based on a light industrial development. We have been provided with an indicative multi-let scheme of six units extending to a total of 25,000 sq ft.

We have assumed costs for BNG reflecting off site provisions at an estimate of £155,000 for the pro rata portion of the site based on an overall cost of £500,000 for the whole site.

We have been provided with build costs as provided by the Purchaser and these include additional specific costs including a capping layer; ground improvements; PV panels and amenity blocks which are considered to be site specific costs. The proposed development costs will be subject to the Overage Agreement as outlined the in Heads of Terms. We understand that the Council may recover additional capital receipts in the event the costs of development are less than those allowed for in the residual appraisal.

Please refer to the summary residual appraisals at Appendix A.

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Valuation Approach

Valuation Components – Scenario 1

As outlined previously we have included the key inputs for each appraisal within the tables below Scenario 1 is 'Light Industrial' and Scenario 2 is for 'Offices'.

Gross Development Value

Schedule of Rental Values

Element	Light Ind / Office Area (Sq Ft)	Rent (£ psf)	Rent Per Annum (£)
Scenario 1			
Light Industrial (Multi-let Warehouse)	91,804	£12.50	£1,147,550

Schedule of Gross Development Value

	Total Rent pa (£)	Yield (%)	Gross GDV (£)	Net GDV After Costs 6.80% (£)
Scenario 1				
Light Industrial (Multi-let Warehouse)	£1,147,550	6.00	£19,125,833	£17,825,277

Our valuation assumes the property would be marketed during the last three months of construction, therefore we have adopted a 12 month marketing period, (allowing for a letting period of 9 months post construction).

We have also assumed a 5-year lease on each of the 4 units subject to a 6 month rent free incentive applied to each unit. We have capitalised a Market Rent of £1,147,550 per annum (£12.50 per sq ft) at an equivalent yield of 6.00%.

This has produced a total value after purchasers' cost of £17,825,000 (£194 per sq ft).

Development Costs

Build Costs

We have not been provided with a cost estimate for whole site industrial development as the proposed purchaser is considering a development for both the offices and light industrial. We have therefore used our experience of valuing similar industrial development sites and cross checked this with similar developments we are advising on together with benchmarking data provided by our cost consultancy colleagues. We have adopted pricing which is reflective of current developments within Greater Manchester and are also consistent with BCIS benchmark indices.

The market has been experiencing a significant rise in build cost inflation over the previous 24 months with some signs of a slowdown as new build projects which are planned but not yet ready to commence. We have adopted a rate of £92.50 per sq ft for construction on light industrial in addition, there is a 3.00% contingency and for the light industrial prelims, profit and overhead at £14.80 per sq ft of the cost of construction. This shows an overall rate of approximately £110.00 per sq ft

The Purchaser has provided a cost summary for the multi-let development under part of the site (please refer to Scenario 2) within the appraisal they have included some site-specific assumptions for adverse ground conditions

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however this only covers part of the site and is an indicative cost pending a Stage 2 Ground Investigation report. **In the absence of information, we have assumed suitable ground conditions and note that the costs of remediation / improvement to ground conditions will need to be deducted from the residual land value reported in Scenario 1.** We are aware from the Stage 1 Ground Investigation Report that there is made ground across the site and we would recommend that further investigations are undertake to understand the true cost of site remediation which should be deducted from our valuation.

Please refer to the table below for key cost inputs:

Scenario 1 – Light Industrial

Item	GIA (Sq ft)	Quantity/Rate	Cost
Construction - Offices	91,804	£92.50 psf	£8,491,870
BNG			£500,000
Contingencies		3.00%	£254,756
Design Allowance Prelims Overheads		£14.80 psf	£1,358,699
Professional Fees		8.00%	£788,046
Marketing			£35,000
Lettings/legal fees		10.00% / 5.00%	£172,133
Purchaser's costs on Land		4.43% SDLT 1.2% agent 0.6% legal	£80,845 £21,923 £10,961

Finance and Profit

Item	Rate	Cost
Finance	6.25%	£1,873,468
Profit on cost	17.50%	£2,697,557
Total		**£4,657,025**

Land Value

Item	Rate per acre	Cost
Residual Land Value	£345,000	£1,825,000

As outlined above this is prepared on the special assumption of suitable ground conditions and any costs associated with site remediation / site preparation will need to be deducted from the reported land value.

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Valuation Approach

Valuation Components – Scenario 2

As outlined previously we have included the key inputs for each appraisal within the tables below Scenario 1 is 'Light Industrial' and Scenario 2 is for 'Offices'.

Gross Development Value

Schedule of Rental Values

Element	Light Ind / Office Area (Sq Ft)	Rent (£ psf)	Rent Per Annum (£)
Offices	40,000	£22.50	£900,000
Light Industrial (Multi-Let Workshop)	25,000	£15.00	£375,000
Total			**£1,212,500**

Schedule of Gross Development Value

	Total Rent pa (£)	Yield (%)	Gross GDV (£)	Net GDV After Costs 6.80% (£)
Office	£900,000	10.00	£8,581,163	£7,997,644
Industrial	£375,500	6.00	£6,185,158	£5,764,567

Based on the above, we have applied an equivalent yield of 10.00% for the offices Our valuation assumes the property the property will be occupied 3 months after practical completion allowing for a fit-out period. We have then run a hypothetical scenario allowing for a 6-month rent free incentive assuming a 5-year term. We have capitalised a Market Rent of £900,000 per annum (£22.50 per sq ft) at an equivalent yield of 10.00%.

Based on the above, this produces a total value after purchasers' cost of £7,998,000 (£200.00 per sq ft) and a negative residual value.

The Council have agreed to transfer the land for the office development at £1. The sale agreement is to be subject to overage and conditions on the Purchaser to commence the development within specified timescales.

The multi let industrial has been capitalised at 6.00% for the light industrial and assumes a phased letting period over nine months after practical completion allowing for a six month rent free period. Based on the above this produces a total value after purchasers' cost of £5,764,000 (£230 per sq ft)

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Development Costs

Build Costs

We have not been provided with a cost estimate for the offices within Scenario 2 and have therefore used our experience of valuing similar sites and cross checked this with our cost consultancy colleagues. We have adopted pricing which is reflective of current developments within Greater Manchester and are also consistent with BCIS benchmark indices.

The Purchaser has provided a cost summary for the multi-let development referred to as Scenario 2 Light Industrial. In accordance with your instructions, we have adopted the cost estimates as provided by the Purchaser.

The adopted rate provided by the Purchaser is £116.45 per sq ft which is inclusive of preliminaries overheads, profit and contingencies. This is slightly above the £110.80 per sq ft we have adopted in Scenario 1. Please refer to earlier comments provided by the Purchaser in relation to specification for the planned development. In addition, there are some site-specific costs which have been included in the appraisal these relate to ground conditions and capping layer, amenity blocks and PV Panels for the multi-let units. We note the proposed sale agreement will include an overage clause providing the Council with the ability to receive additional capital receipts in the event that the actual costs of development are less than the cost estimates provided by the Purchaser.

Please refer to the table below for key cost inputs:

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Scenario 2 - Offices

Item	GIA (Sq ft)	Quantity/Rate	Cost
Construction Offices	40,000	£195.00 psf	£9,184,500
BNG			£345,000
Contingencies		3.00%	£275,535
Professional Fees		8.00%	£734,760
Marketing			£35,000
Lettings/legal fees		10.00% / 5.00%	£135,000
Purchaser's costs on Land		0.00% SDLT 1.2% agent 0.6% legal	£0

Finance and Profit

Item	Rate	Cost
Finance	6.25%	£217,227
Profit on cost	17.50%	£1,191,139
Total		**£1,408,366**

Scenario 2 – Light Industrial

Item	GIA (Sq ft)	Quantity/Rate	Cost
Construction Light Industrial	25,000	£116.45 per sq ft	£2,911,400
BNG			£155,000
Contingencies (included above)			Included above
Design Allowance Prelims Overheads			Included above
Site Specific Costs Estimated by the Purchaser:			
Ground Conditions		£158,620 per acre	£253,789
Capping Layer		£30,911 per acre	£49,459
Amenity Blocks		£17.60 per sq ft	£440,000
PV Panels		£5.71 per sq ft	£142,884
Professional Fees		8.00%	£214,600

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Item	GIA (Sq ft)	Quantity/Rate	Cost
Marketing			£35,000
Lettings/legal fees		10.00% / 5.00%	£81,875
Purchaser's costs on Land		0.5% SDLT 1.2% agent 0.6% legal	£987 £2,392 £1,196

Finance and Profit

Item	Rate	Cost
Finance	6.25%	£264,427
Profit on cost	17.50%	£702,202
Total		**£966,629**

Residual Land Values

The office development shows a negative land value and supports the rationale that the Council are seeking to dispose of the site at £1 to support the proposed office development. The developer / investor market are not delivering office developments outside of major city centres unless there is public sector support due to viability challenges in the current market, this is consistent with the results of our residual appraisal which shows a negative land value for the proposed office development.

Scenario 2

Item	Rate per acre	Residual Land Value
Office 3.6 acres	Negative Land Value	(£4,120,000)
Light Industrial 1.5 acres	£123,500	£200,000

Summary

The additional plot of land allocated as multi-let industrial shows a land value of £200,000 which reflects £125,000 per acre. This includes significant allowances for site specific costs. We have queried the low rate per acre with the Purchaser and provided land value evidence as previously outlined in this report and below we detail the Purchasers response:

"CBRE notes that land transactions elsewhere in the North West have been completing at higher levels. We agree that headline land values have remained strong across certain prime locations. However, Chamberhall carries a number of site-specific constraints which differentiate it from typical consented greenfield or urban edge plots. These include:

- *Known archaeological sensitivity (remains of the original Chamber Hall are located on this part of the site and will require investigation)*
- *Potential contamination from former industrial uses*
- *Planning designation under the Places for Everyone framework, requiring conformity with infrastructure delivery strategies, transport phasing, and ecological enhancements*

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

When these risks are factored into a delivery programme and costed appraisal, the net residual land value is significantly constrained. We do not believe it would be appropriate to apply generic comparables without adjusting for these factors."

Overage Adjustment

As a sense check we have run a scenario appraisal where the site-specific cost adjustments are excluded from the appraisal, when removed the land value this shows a land residual of £500,000 (£345,000 per acre) which is more consistent with the land sales evidence.

The Purchaser has provided estimated costs for potential ground works and capping layers and also providing amenity blocks and PV Panels to the multi-let units. Within the draft Heads of Terms, we understand there is an overage agreement. This means that if the actual costs of remediation / development are less than those allowed for in the residual appraisal the Council will have the opportunity to receive additional capital payments from the Purchaser.

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Opinions of Value

Market Value Scenario 1 - Light Industrial Development over the Whole Site

Our Valuation is **£1,825,000 (One Million Eight Hundred and Twenty-Five Thousand Pounds)** exclusive of VAT:

- £345,000 per acre
- The above scenario has been prepared to understand the opportunity cost to Bury Council for the proposed sale of the land to the Purchaser. Please note the figures reported above do not include any deductions for abnormal ground conditions. The actual costs of site remediation are not currently known. and would need to be deducted from this figure on completion of further investigation.

Sensitivity Analysis

The Valuation method adopted for development valuations is very sensitive to changes in key inputs. Small changes in variables such as sales volumes or build costs will have a disproportionate effect on land value. Site values can therefore be susceptible to considerable variances as a result of changes in market conditions.

		Construction Rate - £92.50 per sq ft				
		-10.00%	-5.00%	0.00%	+5.00%	+10.00%
Yield Shift 6.00%	5.50%	£3,725,123	£3,312,035	£2,898,946	£2,485,853	£2,072,766
	5.75%	£3,165,800	£2,752,711	£2,339,618	£2,485,853	£1,513,442
	6.00%	£2,653,086	£2,239,993	**£1,825,000**	£1,413,817	£1,000,728
	6.25%	£2,181,385	£1,768,298	£1,355,210	£,942,121	£529,031
	6.50%	£1,745,975	£1,332,886	£919,797	£506,708	£87,904

The sensitivity analysis shows that a small change in input in valuation yield or build cost can have a significant impact on the end residual value to the extend that 50 basis point movement in yield and 10.00% increase in build costs reduces the land value to below £100,000.

Values can change over a short space of time and we would recommend the Council continue to monitor the development over the course of the next few years to monitor progress on construction as market conditions may change and this could impact on future overage payments.

Market Value Scenario 2 – Office Development

Our Valuation is **£1 (One Pound)** exclusive of VAT

- The land residual reflects a negative land value for the offices for the purpose of the proposed transaction therefore we have adopted a land value of £1.

Market Value Scenario 2 – Light Industrial Development

Our Valuation is **£200,000 (Two Hundred Thousand Pounds)** exclusive of VAT

- The land residual reflects a land value of £125,000 per acre.
- The valuation is subject to site specific cost estimates which have been provided by the Purchaser. In accordance with the heads of terms, there is the potential for the Council to recover additional sums for the land in the event the actual development costs are less than those adopted in the residual appraisal.

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Sensitivity Analysis

The Valuation method adopted for development Valuations is very sensitive to changes in key inputs. Small changes in variables such as sales volumes or build costs will have a disproportionate effect on land value. Site values can therefore be susceptible to considerable variances as a result of changes in market conditions.

Construction Rate - £116.45 per sq ft

Yield Shift	-5.00%	-2.50%	0.00%	+2.50%	+5.00%
+0.50%	£828,767	£693,479	£558,192	£422,903	£287,615
+0.25%	£642,234	£506,946	£371,658	£235,978	£95,732
0.00%	£471,250	£335,962	**£200,000**	£58,287	(£89,094)
-0.25%	£599,899	£176,600	(£35,191)	(£113.838)	(£265,442)
-0.50%	£166,407	(£24,800)	(£124,923)	(£276,596)	(£429,041)

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Appendices

Docusign Envelope ID: 6C63B1AB-77AF-47F7-91F5-740F6D74F02D

Appendix: Valuation Printouts

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Chamberhall Business Park
Scenario 1 - Light Industrial Whole Site

Chamberhall Business Park
Bury
BL9 0JU

Development Appraisal
Prepared by TM / GH
CBRE
06 October 2025

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

TIMESCALE AND PHASING CHART CBRE

Chamberhall Business Park
Scenario 1 - Light Industrial Whole Site

Project Timescale	
Project Start Date	Dec 2024
Project End Date	Jan 2028
Project Duration (Inc Exit Period)	38 months

Phase 1

	Start Date	Duration	End Date	Dec 24
Project	Dec 2024	38	Jan 2028	
Purchase	Dec 2024	1 Month(s)	Dec 2024	
Pre-Construction	Jan 2025	6 Month(s)	Jun 2025	
Construction	Jul 2025	12	Jun 2026	
Post Development	Jul 2026	0 Month(s)		
Letting	Jul 2026	18	Dec 2027	
Income Flow	Jan 2028	0 Month(s)		
Sale	Jan 2028	1 Month(s)	Jan 2028	
Cash Activity	Dec 2024	38	Jan 2028	
				1

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

APPRAISAL SUMMARY CBRE

Chamberhall Business Park
Scenario 1 - Light Industrial Whole Site

Appraisal Summary for Phase 1

Currency in £

REVENUE

Rental Area Summary

	Units	ft²	Rent Rate ft²	Initial MRV/Unit	Net Rent at Sale
Unit 1	4	24,862	12.50	77,694	310,775
Unit 2	4	26,766	12.50	83,644	334,575
Unit 3	4	16,585	12.50	51,828	207,313
Unit 4	4	23,591	12.50	73,722	294,888
Totals	**16**	**91,804**			**1,147,550**

Investment Valuation

Unit 1					
Current Rent	310,775	YP @	6.0000%	16.6667	5,179,583
Unit 2					
Current Rent	334,575	YP @	6.0000%	16.6667	5,576,250
Unit 3					
Current Rent	207,313	YP @	6.0000%	16.6667	3,455,208
Unit 4					
Current Rent	294,888	YP @	6.0000%	16.6667	4,914,792
Total Investment Valuation					**19,125,833**

GROSS DEVELOPMENT VALUE			**19,125,833**	
Purchaser's Costs		(1,300,557)		
Effective Purchaser's Costs Rate	6.80%			
			(1,300,557)	
NET DEVELOPMENT VALUE			**17,825,277**	
Income from Tenants				
Unit 1		77,694		
Unit 2		83,644		
Unit 3		51,828		
Unit 4		73,722		
			286,888	
NET REALISATION			**18,112,164**	
OUTLAY				
ACQUISITION COSTS				
Residualised Price (5.30 Acres @ 344,699.30 /Acre)		1,826,906		
			1,826,906	
Stamp Duty		80,845		
Effective Stamp Duty Rate	4.43%			
Agent Fee	1.20%	21,923		
Legal Fee	0.60%	10,961		

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

APPRAISAL SUMMARY CBRE

Chamberhall Business Park
Scenario 1 - Light Industrial Whole Site

113,730

CONSTRUCTION COSTS				
Construction	**ft²**	**Build Rate ft²**	**Cost**	
Unit 1	24,862	92.50	2,299,735	
Unit 2	26,766	92.50	2,475,855	
Unit 3	16,585	92.50	1,534,112	
Unit 4	23,591	92.50	2,182,167	
Totals	**91,804 ft²**		**8,491,870**	
Contingency		3.00%	254,756	
Statutory/LA			500,000	
				9,246,626
Other Construction				
Design Allowance Prelims Overheads	91,804 ft²	14.80	1,358,699	
				1,358,699
PROFESSIONAL FEES				
All Professional Fees		8.00%	788,046	
				788,046
MARKETING & LETTING				
Marketing			35,000	
Letting Agent Fee		10.00%	114,755	
Letting Legal Fee		5.00%	57,378	
				207,133
FINANCE				
Debit Rate 6.250%, Credit Rate 0.000% (Nominal)				
Land			189,305	
Construction			327,805	
Letting			1,356,358	
Total Finance Cost				1,873,468
TOTAL COSTS				**15,414,607**
PROFIT				
				2,697,557

Performance Measures	
Profit on Cost%	17.50%
Profit on GDV%	14.10%
Profit on NDV%	15.13%
Development Yield% (on Rent)	7.44%
Equivalent Yield% (Nominal)	6.00%
Equivalent Yield% (True)	6.23%
IRR% (without Interest)	14.27%
Rent Cover	2 yrs 4 mths
Profit Erosion (finance rate 6.250)	2 yrs 7 mths

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

APPRAISAL SUMMARY CBRE

Chamberhall Business Park
Scenario 1 - Light Industrial Whole Site

	Initial MRV
	310,775
	334,575
	207,313
	294,888
	1,147,550

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

APPRAISAL SUMMARY **CBRE**

Chamberhall Business Park
Scenario 1 - Light Industrial Whole Site

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

SENSITIVITY ANALYSIS REPORT CBRE

Chamberhall Business Park
Scenario 1 - Light Industrial Whole Site

Table of Land Cost and IRR%

	Construction: Rate /ft²				
Rent: Yield	-10.000%	-5.000%	0.000%	+5.000%	+10.000%
	83.25 /ft²	87.88 /ft²	92.50 /ft²	97.13 /ft²	101.75 /ft²
-0.5000%	(€3,725,123)	(€3,312,035)	(€2,898,946)	(€2,485,853)	(€2,072,766)
5.5000%	13.7684%	13.8811%	13.9977%	14.1183%	14.2431%
-0.2500%	(€3,165,800)	(€2,752,711)	(€2,339,618)	(€1,926,531)	(€1,513,442)
5.7500%	13.8826%	14.0045%	14.1308%	14.2618%	14.3978%
0.0000%	(€2,653,086)	(€2,239,993)	(€1,826,906)	(€1,413,817)	(€1,000,728)
6.0000%	14.0005%	14.1322%	14.2690%	14.4112%	14.5591%
+0.2500%	(€2,181,385)	(€1,768,298)	(€1,355,210)	(€942,121)	(€529,031)
6.2500%	14.1225%	14.2646%	14.4125%	14.5667%	14.7275%
+0.5000%	(€1,745,975)	(€1,332,886)	(€919,797)	(€506,708)	(€87,904)
6.5000%	14.2486%	14.4017%	14.5616%	14.7287%	14.9036%

Sensitivity Analysis : Assumptions for Calculation

Construction: Rate /ft²
Original Values are varied by Steps of 5.000%.

Heading	Phase	Rate	No. of Steps
Unit 1	1	€92.50	2.00 Up & Down
Unit 2	1	€92.50	2.00 Up & Down
Unit 3	1	€92.50	2.00 Up & Down
Unit 4	1	€92.50	2.00 Up & Down

Rent: Yield
Original Values are varied in Fixed Steps of 0.25%

Heading	Phase	Cap. Rate	No. of Steps
Unit 1	1	6.0000%	2.00 Up & Down
Unit 2	1	6.0000%	2.00 Up & Down
Unit 3	1	6.0000%	2.00 Up & Down
Unit 4	1	6.0000%	2.00 Up & Down

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

ASSUMPTIONS AND DEFAULTS CBRE

Chamberhall Business Park
Scenario 1 - Light Industrial Whole Site

Assumptions

Expenditure

Professional Fees are based on Construction
Purchaser's Costs are based on Gross Capitalisation
Purchaser's Costs Deducted from Sale (Not added to Cost)
Sales Fees are based on Net Capitalisation
Sales Fees Added to Cost (Not deducted from Sale)
Purchaser's Costs exclude sales

Receipts

Show tenant's true income stream	On
Offset income against development costs	Off
Rent payment cycle	Quarterly (Adv)
Apply rent payment cycle to all tenants	On
Renewal Void and Rent Free apply to first renewal only	Off
Growth starts from lease start date	Off
Deduct Ground Rent from Stepped Rent,	On
Initial Yield Valuation Method	Off
Default Capitalisation Yield	0.0000%
Apply Default Capitalisation to All Tenants	Off
Default stage for Sale Date	Off
Align end of income stream to Sale Date	Off
Apply align end of income stream to all tenants	On
When the Capital Value is modified in the cash flow	Recalculate the Yield
Valuation Tables are	Annually in Arrears
Deduct Post-Sale TI Costs & Lease Comm. from Cap. Value	Off
Rent Free method	Defer start of Tenant's Rent

Finance

Financing Method	Basic (Interest Sets)
Interest Compounding Period	Quarterly
Interest Charging Period	Monthly
Nominal rates of interest used	
Calculate interest on Payments/Receipts in final period	Off
Include interest and Finance Fees in IRR Calculations	Off
Automatic Inter-account transfers	Off
Manual Finance Rate for Profit Erosion	Off

Calculation

Site Payments	In Arrears
Other Payments	In Arrears
Negative Land	In Arrears
Receipts	In Advance
IRR Basis	Annual - calculated monthly
Initial IRR Guess Rate	8.00%
Manual Discount Rate	Off
Minimum IRR	-100%
Maximum IRR	99999%
IRR Tolerance	0.001000
IRR Iterations	35
Land Residual Calculation Function	Interpolation method

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

ASSUMPTIONS AND DEFAULTS CBRE

Chamberhall Business Park
Scenario 1 - Light Industrial Whole Site

Assumptions

Letting and Rent Review Fees are calculated on	Net of Deductions
Development Yield and Rent Cover are calculated on	Rent at Sale Date(s)
Include Tenants with no Capital Value	On
Include Turnover Rent	Off
Net of Non-Recoverable costs	On
Net of Ground Rent deductions	On
Net of Rent Additions/Costs	On
Leasing Commissions are calculated	After Non-Recoverable cost deductions For the First Term of the lease only

Value Added Tax

Global VAT Rate	0.00%
Global Recovery Rate	0.00%
Recovery Cycle every	2 months
1st Recovery Month	2 (Jan 2025)
VAT Calculations in Cash Flow	On

Residual

Land Cost Mode	Part Fixed / Part Residual
Multi-Phasing	Separate Land Residual for each phase
Target Type	Profit on Cost

Phase Number	Target Value	Locked Value	Treat Neg Land as Revenue
Phase 1	17.50%	No	No

Distribution

Construction Payments are paid on	S-Curve
Sales Receipts are paid on	Single curve
Sales Deposits are paid on	Monthly curve

Interest Sets

Interest Set 1

Debit Rate	Credit Rate	Months	Start Date
6.250%	0.000%	Perpetuity	Dec 2024

Loan Set 1

Debit Rate	Credit Rate	Months	Start Date
0.000%	0.000%	Perpetuity	Dec 2024

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

ASSUMPTIONS AND DEFAULTS CBRE

Chamberhall Business Park
Scenario 1 - Light Industrial Whole Site

Assumptions

Inflation and Growth

Growth Sets

Growth Set 1
Inflation/Growth for this set is calculated in arrears
This set is not stepped

Rate	Months	Start Date
0.000%	Perpetuity	Dec 2024

Inflation Sets

Inflation Set 1
Inflation/Growth for this set is calculated in arrears
This set is not stepped

Rate	Months	Start Date
0.000%	Perpetuity	Dec 2024

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

Chamberhall Business Park
Light Industrial Additional Plot

Chamberhall Business Park
Bury
BL9 0JU

Development Appraisal
Prepared by TM / GH
CBRE
31 July 2025

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

TIMESCALE AND PHASING CHART

CBRE

Chamberhall Business Park
Light Industrial Additional Plot

Project Timescale	
Project Start Date	Jun 2025
Project End Date	Mar 2028
Project Duration (Inc Exit Period)	34 months

Phase 1

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

APPRAISAL SUMMARY

CBRE

Chamberhall Business Park
Light Industrial Additional Plot

Appraisal Summary for Phase 1

Currency in £

REVENUE

Rental Area Summary

	Units	ft²	Rent Rate ft²	Initial MRV/Unit	Net Rent at Sale	Initial MRV
Unit A	1	3,500	15.00	52,500	52,500	52,500
Unit B	1	3,500	15.00	52,500	52,500	52,500
Unit C	1	4,500	15.00	67,500	67,500	67,500
Unit D	1	4,500	15.00	67,500	67,500	67,500
Unit E	1	4,500	15.00	67,500	67,500	67,500
Unit F	1	4,500	15.00	67,500	67,500	67,500
Totals	**6**	**25,000**			**375,000**	**375,000**

Investment Valuation

Unit A					
Current Rent	52,500	YP @	6.0000%	16.6667	875,000
Unit B					
Current Rent	52,500	YP @	6.0000%	16.6667	875,000
Unit C					
Current Rent	67,500	YP @	6.0000%	16.6667	1,125,000
Unit D					
Market Rent	67,500	YP @	6.0000%	16.6667	
(3mths Unexpired Rent Free)		PV 3mths @	6.0000%	0.9855	1,108,731
Unit E					
Market Rent	67,500	YP @	6.0000%	16.6667	
(3mths Unexpired Rent Free)		PV 3mths @	6.0000%	0.9855	1,108,731
Unit F					
Market Rent	67,500	YP @	6.0000%	16.6667	
(6mths Rent Free)		PV 6mths @	6.0000%	0.9713	1,092,697
Total Investment Valuation					**6,185,158**

GROSS DEVELOPMENT VALUE			**6,185,158**
Purchaser's Costs		(420,591)	
Effective Purchaser's Costs Rate	6.80%		
			(420,591)
NET DEVELOPMENT VALUE			**5,764,567**
Income from Tenants			13,125
NET REALISATION			**5,777,692**
OUTLAY			
ACQUISITION COSTS			
Residualised Price (1.60 Acres @ 124,530.24 /Acre)		199,248	
			199,248
Stamp Duty		985	
Effective Stamp Duty Rate	0.49%		
Agent Fee	1.20%	2,391	
Legal Fee	0.60%	1,195	

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

APPRAISAL SUMMARY CBRE

Chamberhall Business Park
Light Industrial Additional Plot

				4,571
CONSTRUCTION COSTS				
Construction	**ft²**	**Build Rate ft²**	**Cost**	
Unit A	3,500	116.46	407,610	
Unit B	3,500	116.46	407,610	
Unit C	4,500	116.46	524,070	
Unit D	4,500	116.46	524,070	
Unit E	4,500	116.46	524,070	
Unit F	4,500	116.46	524,070	
Totals	**25,000 ft²**		**2,911,500**	
Statutory/LA			155,000	
				3,066,500
Other Construction				
Amenity Blocks			440,000	
Ground Improvement			253,789	
PV Panel			142,884	
Capping Layer			49,459	
				886,132
PROFESSIONAL FEES				
All Professional Fees		8.00%	268,120	
				268,120
MARKETING & LETTING				
Marketing			35,000	
Letting Agent Fee		10.00%	37,500	
Letting Legal Fee		5.00%	18,750	
				91,250
FINANCE				
Debit Rate 6.250%, Credit Rate 0.000% (Nominal)				
Land			25,732	
Construction			154,077	
Letting			221,554	
Total Finance Cost				401,363
TOTAL COSTS				**4,917,185**
PROFIT				
				860,507
Performance Measures				
Profit on Cost%		17.50%		
Profit on GDV%		13.91%		
Profit on NDV%		14.93%		
Development Yield% (on Rent)		7.63%		
Equivalent Yield% (Nominal)		6.00%		
Equivalent Yield% (True)		6.23%		
IRR% (without Interest)		18.30%		
Rent Cover		2 yrs 4 mths		
Profit Erosion (finance rate 6.250)		2 yrs 7 mths		

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

SENSITIVITY ANALYSIS REPORT CBRE

Chamberhall Business Park
Light Industrial Additional Plot

Table of Land Cost and IRR%

Construction: Cost / Unit					
Rent: Yield	-10.000%	-5.000%	0.000%	+5.000%	+10.000%
	366,849	387,230	407,610	427,991	448,371
-0.5000%	(£828,767)	(£693,479)	(£558,192)	(£422,903)	(£287,615)
5.5000%	16.7975%	17.0941%	17.4100%	17.7473%	18.1086%
-0.2500%	(£642,234)	(£506,946)	(£371,658)	(£235,976)	(£95,732)
5.7500%	17.1432%	17.4775%	17.8358%	18.2210%	18.6366%
0.0000%	(£471,250)	(£335,962)	(£199,248)	(£58,283)	£89,210
6.0000%	17.5155%	17.8930%	18.3004%	18.7417%	19.3209%
+0.2500%	(£313,950)	(£176,600)	(£35,191)	£113,838	£265,442
6.2500%	17.9180%	18.3453%	18.8100%	19.4508%	20.2131%
+0.5000%	(£166,407)	(£24,797)	£124,923	£276,596	£429,041
6.5000%	18.3548%	18.8400%	19.5251%	20.3306%	21.2603%

Sensitivity Analysis : Assumptions for Calculation

Construction: Cost / Unit
Original Values are varied by Steps of 5.000%.

Heading	Phase	Amount	No. of Steps
Unit A	1	£407,610	2.00 Up & Down
Unit B	1	£407,610	2.00 Up & Down
Unit C	1	£524,070	2.00 Up & Down
Unit D	1	£524,070	2.00 Up & Down
Unit E	1	£524,070	2.00 Up & Down
Unit F	1	£524,070	2.00 Up & Down

Rent: Yield
Original Values are varied in Fixed Steps of 0.25%

Heading	Phase	Cap. Rate	No. of Steps
Unit A	1	6.0000%	2.00 Up & Down
Unit B	1	6.0000%	2.00 Up & Down
Unit C	1	6.0000%	2.00 Up & Down
Unit D	1	6.0000%	2.00 Up & Down
Unit E	1	6.0000%	2.00 Up & Down
Unit F	1	6.0000%	2.00 Up & Down

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

ASSUMPTIONS AND DEFAULTS

CBRE

Chamberhall Business Park
Light Industrial Additional Plot

Assumptions

Expenditure

Professional Fees are based on Construction
Purchaser's Costs are based on Gross Capitalisation
Purchaser's Costs Deducted from Sale (Not added to Cost)
Sales Fees are based on Net Capitalisation
Sales Fees Added to Cost (Not deducted from Sale)
Purchaser's Costs exclude sales

Receipts

Show tenant's true income stream	On
Offset income against development costs	Off
Rent payment cycle	Quarterly (Adv)
Apply rent payment cycle to all tenants	On
Renewal Void and Rent Free apply to first renewal only	Off
Growth starts from lease start date	Off
Deduct Ground Rent from Stepped Rent,	On
Initial Yield Valuation Method	Off
Default Capitalisation Yield	0.0000%
Apply Default Capitalisation to All Tenants	Off
Default stage for Sale Date	Off
Align end of income stream to Sale Date	Off
Apply align end of income stream to all tenants	On
When the Capital Value is modified in the cash flow	Recalculate the Yield
Valuation Tables are	Annually in Arrears
Deduct Post-Sale TI Costs & Lease Comm. from Cap. Value	Off
Rent Free method	Defer start of Tenant's Rent

Finance

Financing Method	Basic (Interest Sets)
Interest Compounding Period	Quarterly
Interest Charging Period	Monthly
Nominal rates of interest used	
Calculate interest on Payments/Receipts in final period	Off
Include interest and Finance Fees in IRR Calculations	Off
Automatic Inter-account transfers	Off
Manual Finance Rate for Profit Erosion	Off

Calculation

Site Payments	In Arrears
Other Payments	In Arrears
Negative Land	In Arrears
Receipts	In Advance
IRR Basis	Annual - calculated monthly
Initial IRR Guess Rate	8.00%
Manual Discount Rate	Off
Minimum IRR	-100%
Maximum IRR	99999%
IRR Tolerance	0.001000
IRR Iterations	35
Land Residual Calculation Function	Interpolation method
Letting and Rent Review Fees are calculated on	Net of Deductions
Development Yield and Rent Cover are calculated on	Rent at Sale Date(s)
Include Tenants with no Capital Value	On
Include Turnover Rent	Off
Net of Non-Recoverable costs	On

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

ASSUMPTIONS AND DEFAULTS

CBRE

Chamberhall Business Park
Light Industrial Additional Plot

Assumptions

Net of Ground Rent deductions	On
Net of Rent Additions/Costs	On
Leasing Commissions are calculated	After Non-Recoverable cost deductions For the First Term of the lease only

Value Added Tax

Global VAT Rate	0.00%
Global Recovery Rate	0.00%
Recovery Cycle every	2 months
1st Recovery Month	2 (Jul 2025)
VAT Calculations in Cash Flow	On

Residual

Land Cost Mode	Part Fixed / Part Residual
Multi-Phasing	Separate Land Residual for each phase
Target Type	Profit on Cost

Phase Number	Target Value	Locked Value	Treat Neg Land as Revenue
Phase 1	17.50%	No	No

Distribution

Construction Payments are paid on	S-Curve
Sales Receipts are paid on	Single curve
Sales Deposits are paid on	Monthly curve

Interest Sets

Interest Set 1

Debit Rate	Credit Rate	Months	Start Date
6.250%	0.000%	Perpetuity	Jun 2025

Loan Set 1

Debit Rate	Credit Rate	Months	Start Date
0.000%	0.000%	Perpetuity	Jun 2025

Inflation and Growth

Growth Sets

Growth Set 1
Inflation/Growth for this set is calculated in arrears
This set is not stepped

Rate	Months	Start Date
0.000%	Perpetuity	Jun 2025

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

Chamberhall Business Park
Light Industrial Additional Plot

Assumptions

Inflation Sets

Inflation Set 1
Inflation/Growth for this set is calculated in arrears
This set is not stepped

Rate	Months	Start Date
0.000%	Perpetuity	Jun 2025

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

Chamberhall Business Park

Chamberhall Business Park
Bury
BL9 0JU

Development Appraisal
Prepared by TM / GH
CBRE
06 February 2025

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

TIMESCALE AND PHASING CHART

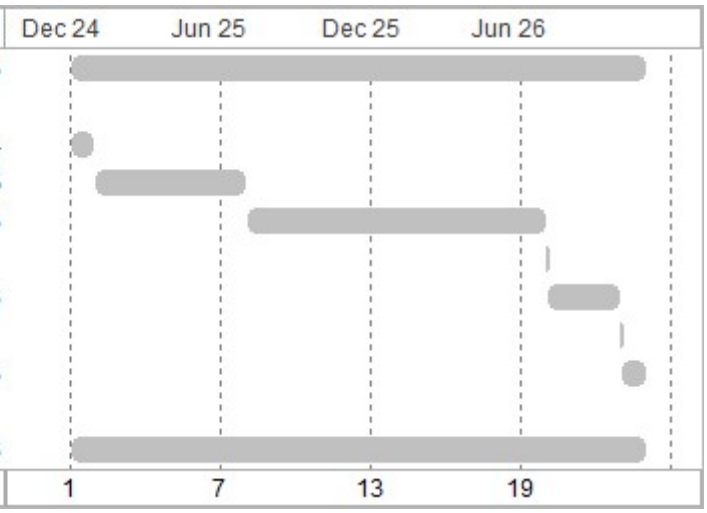
CBRE

Chamberhall Business Park

Project Timescale	
Project Start Date	Dec 2024
Project End Date	Oct 2026
Project Duration (Inc Exit Period)	23 months

Phase 1

	Start Date	Duration	End Date
Project	Dec 2024	23	Oct 2026
Purchase	Dec 2024	1 Month(s)	Dec 2024
Pre-Construction	Jan 2025	6 Month(s)	Jun 2025
Construction	Jul 2025	12	Jun 2026
Post Development	Jul 2026	0 Month(s)	
Letting	Jul 2026	3 Month(s)	Sep 2026
Income Flow	Oct 2026	0 Month(s)	
Sale	Oct 2026	1 Month(s)	Oct 2026
Cash Activity	Dec 2024	23	Oct 2026



Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

APPRAISAL SUMMARY CBRE

Chamberhall Business Park

Appraisal Summary for Phase 1

Currency in £

REVENUE

Rental Area Summary	**Units**	**ft²**	**Rent Rate ft²**	**Initial MRV/Unit**	**Net Rent at Sale**	**Initial MRV**
Offices	1	40,000	22.50	900,000	900,000	900,000

Investment Valuation

Offices					
Market Rent	900,000	YP @	10.0000%	10.0000	
(6mths Rent Free)		PV 6mths @	10.0000%	0.9535	8,581,163
GROSS DEVELOPMENT VALUE				**8,581,163**	
Purchaser's Costs			(583,519)		
Effective Purchaser's Costs Rate		6.80%			
				(583,519)	
NET DEVELOPMENT VALUE				**7,997,644**	
NET REALISATION				**7,997,644**	
OUTLAY					
ACQUISITION COSTS					
Residualised Price (Negative land)			(4,120,516)		
				(4,120,516)	

CONSTRUCTION COSTS

Construction

	ft²	**Build Rate ft²**	**Cost**	
Offices	47,100	195.00	9,184,500	**9,184,500**
Contingency		3.00%	275,535	
Statutory/LA			345,000	
				620,535

PROFESSIONAL FEES				
All Professional Fees		8.00%	734,760	
				734,760
MARKETING & LETTING				
Marketing			35,000	
Letting Agent Fee		10.00%	90,000	
Letting Legal Fee		5.00%	45,000	
				170,000
FINANCE				
Debit Rate 6.250%, Credit Rate 0.000% (Nominal)				
Total Finance Cost				217,227
TOTAL COSTS				**6,806,505**
PROFIT				
				1,191,139

Performance Measures	
Profit on Cost%	17.50%
Profit on GDV%	13.88%
Profit on NDV%	14.89%

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APPRAISAL SUMMARY CBRE

Chamberhall Business Park

Development Yield% (on Rent)	13.22%
Equivalent Yield% (Nominal)	10.00%
Equivalent Yield% (True)	10.66%
IRR% (without Interest)	N/A
Rent Cover	1 yr 4 mths
Profit Erosion (finance rate 6.250)	2 yrs 7 mths

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SENSITIVITY ANALYSIS REPORT CBRE

Chamberhall Business Park

Sensitivity Analysis results are not available.
Click the Analysis Results tab, then print the report.

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

ASSUMPTIONS AND DEFAULTS

CBRE

Chamberhall Business Park

Assumptions

Expenditure

Professional Fees are based on Construction
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Purchaser's Costs Deducted from Sale (Not added to Cost)
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Include Tenants with no Capital Value	On
Include Turnover Rent	Off
Net of Non-Recoverable costs	On
Net of Ground Rent deductions	On

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ASSUMPTIONS AND DEFAULTS

CBRE

Chamberhall Business Park

Assumptions

Net of Rent Additions/Costs	On
Leasing Commissions are calculated	After Non-Recoverable cost deductions For the First Term of the lease only

Value Added Tax

Global VAT Rate	0.00%
Global Recovery Rate	0.00%
Recovery Cycle every	2 months
1st Recovery Month	2 (Jan 2025)
VAT Calculations in Cash Flow	On
GST Margin Calculations in Cash Flow	Off

Residual

Land Cost Mode	Part Fixed / Part Residual
Multi-Phasing	Separate Land Residual for each phase
Target Type	Profit on Cost

Phase Number	Target Value	Locked Value	Treat Neg Land as Revenue
Phase 1	17.50%	No	No

Distribution

Construction Payments are paid on	S-Curve
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Interest Sets

Interest Set 1

Debit Rate	Credit Rate	Months	Start Date
6.250%	0.000%	Perpetuity	Dec 2024

Loan Set 1

Debit Rate	Credit Rate	Months	Start Date
0.000%	0.000%	Perpetuity	Dec 2024

Inflation and Growth

Growth Sets

Growth Set 1

Inflation/Growth for this set is calculated in arrears
This set is not stepped

Rate	Months	Start Date
0.000%	Perpetuity	Dec 2024

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Chamberhall Business Park

Assumptions

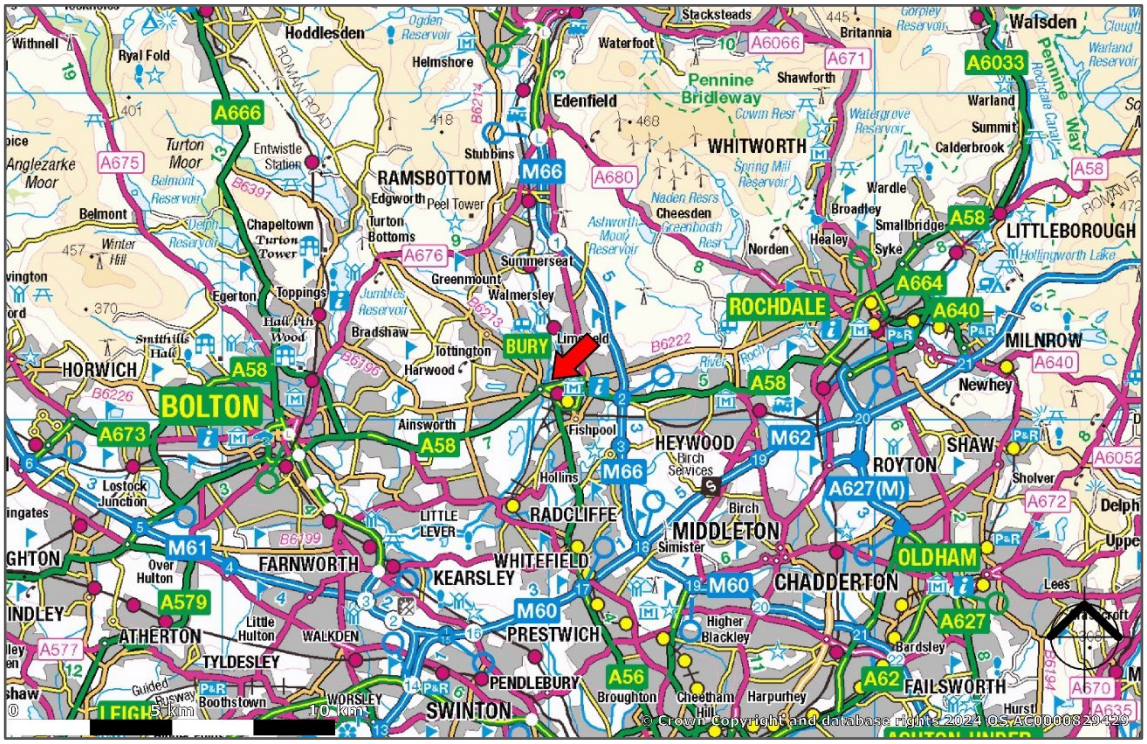
Inflation Sets

Inflation Set 1
Inflation/Growth for this set is calculated in arrears
This set is not stepped

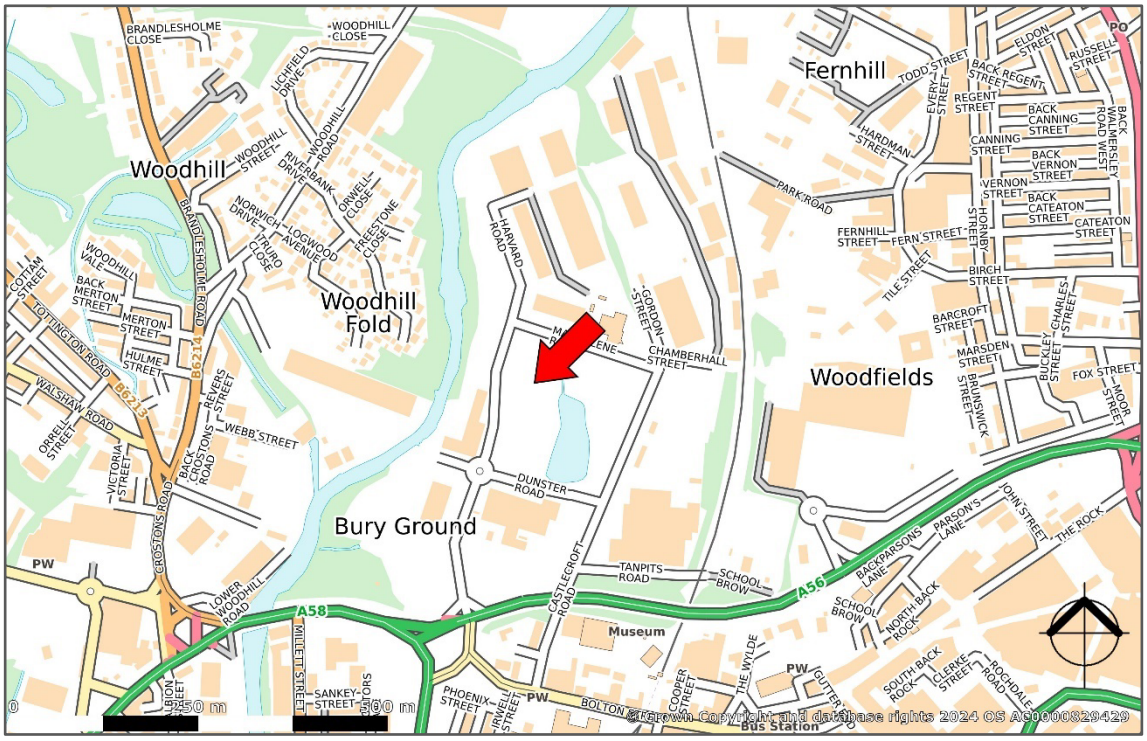
Rate	Months	Start Date
0.000%	Perpetuity	Dec 2024

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

Appendix: Location Plans



Location Plan 1 - City Level



Location Plan 2 – Street Level

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

Location Plan – Ordnance Survey Level

Docusign Envelope ID: 6C63B1AD-77AF-47F7-91F5-740F6D74F02D

Appendix: Photographs

Photograph 1: Development Land

Photograph 2: Development Land

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VALUATION REPORT

Sites at
Chamberhall Business Park
Harvard Road
Bury
Greater Manchester
BL9 0FU

Prepared on behalf of:

Bury Council
Town Hall
Knowsley Street
Bury
Greater Manchester
BL9 0SW

Prepared by:

Paul Nolan BSc (Hons) FRICS
Director
Nolan Real Estate
Haweswater House
Waterfold Business Park
Bury
Greater Manchester
BL9 7BR

Date of Inspection: 5th November 2025

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4. Basis of Valuation **4**
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8. Areas **7**
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Our ref: VR25-038/PN/JS

18 November 2025

STRICTLY PRIVATE & CONFIDENTIAL

Bury Council
Town Hall
Knowsley Street
Bury
Greater Manchester
BL9 0SW

Direct Line: 0161 763 0822
Email paul@nolanredshaw.co.uk

Dear Sirs,

Re: Sites at Chamberhall Business Park, Harvard Road, Bury, BL9 0FU

In accordance with your written instructions received via email dated 17th October 2025, as confirmed by our Terms of Engagement dated 20th October 2025, we have now inspected the above sites and can report to you as follows:

1. Instructions

You have asked for our opinion of the Market Value of the freehold interest in the above sites. A copy of our Terms of Engagement, which form part of the Report and Valuation, is attached at **Appendix 1**. The specific instructions were to provide the following valuations:

1) **The Market Value of the whole site**, on the special assumption that the development scheme is completed in accordance with the development plan no. 13540-AEW-SI-XX-DR-A-0004-P03 (**see Appendix 3**).

2) **The Market Value of Plot 1**, on the special assumption that the development scheme is completed in accordance with the site plan dated 21.11.24 (**see Appendix 3**).

3) **The Market Value of Plot 2,** on the special assumption that the development scheme is completed in accordance with the site plan dated 21.11.24 (**see Appendix 3**).

2. Purpose of Valuation

The valuation is required for disposal purposes of the remainder of Chamberhall Business Park.

We confirm that we have not had any material previous involvement with you in respect of the subject sites. Further, in accordance with the International Valuation Council Standards and the Royal Institution of Chartered Surveyors Valuation – Global Standards effective 31 January 2025 incorporating the UK National Supplement, we have undertaken checks and can confirm that there is no conflict of interest. We also confirm that we have sufficient Professional Indemnity cover for this instruction.

3. Date of Valuation

The date of our valuation is 5th November 2025, which is the date the sites were inspected.

The inspection of the sites was undertaken by Paul Nolan BSc (Hons) FRICS, who is an RICS Registered Valuer and has the relevant knowledge, skills and understanding to value sites of this nature, assisted by Kim Lee MRICS who is also an RICS Registered Valuer. Our valuations are based upon the information obtained at the date of inspection. Any subsequent alterations to the sites of which we have not been made aware may have an adverse effect on our opinions of value.

4. Basis of Valuation

In accordance with your instructions the following bases of valuation have been adopted:

- **Whole Site – Proposed Industrial Development (Special Assumption)**
  The Market Value of the entire site on the special assumption that the development scheme is completed in accordance with the development plan no. 13540-AEW-SI-XX-DR-A-0004-P03 (see **Appendix 3**).

- **Plot 1 – Proposed Office Development (Special Assumption)**
  The Market Value of Plot 1 on the special assumption that the development scheme is completed in accordance with the site plan dated 21.11.24 (see **Appendix 3**).

- **Plot 2 – Proposed Industrial Development (Special Assumption)**
  The Market Value of Plot 2 on the special assumption that the development scheme is completed in accordance with the site plan dated 21.11.24 (see **Appendix 3**).

Market Value which is defined in the RICS Valuation – Global Standards 2025 VPS2 as: The estimated amount for which an asset or liability should exchange on the valuation date between a willing buyer and a willing seller, in an arm's-length transaction, after proper marketing and where the parties had each acted knowledgeably, prudently and without compulsion.

The valuations have been prepared in accordance with the International Valuation Council Standards and the Royal Institution of Chartered Surveyors Valuation – Global Standards effective 31 January 2025 incorporating the UK National Supplement latest update, published by the Royal Institution of Chartered Surveyors. The Terms of Engagement attached at **Appendix 1** form part of this Report.

All three valuations rely on explicit **Special Assumptions**, as defined in the RICS Valuation – Global Standards (Red Book). These assume that the proposed developments:

- are deliverable.
- will be completed in full as per the drawings. We have assumed that the specification and workmanship up to market standards.
- will obtain all necessary statutory and regulatory consents without material amendment; and
- will be delivered without abnormal costs, delays or changes.

We have not independently verified planning status, technical deliverability, build cost accuracy, or financial viability. Should any of the above assumptions prove incorrect, the reported values may change, potentially materially.

5. Tenure

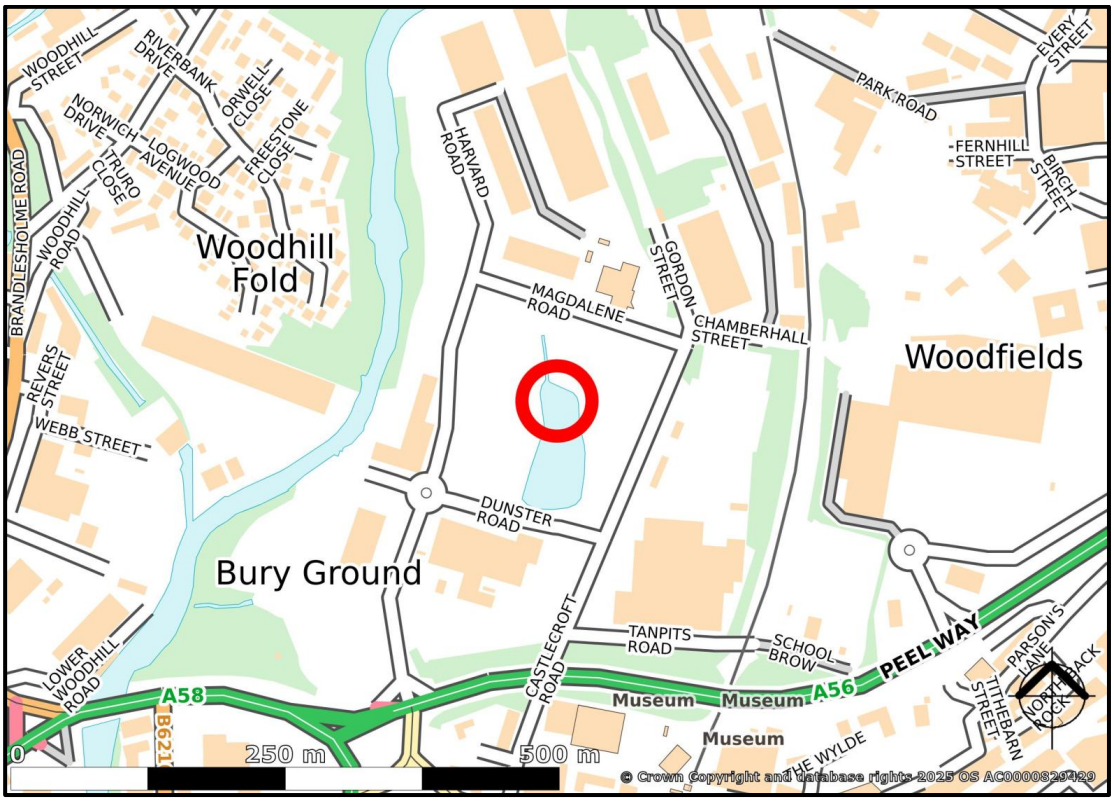
You have advised us that the interest to be valued is freehold with vacant possession.

In accordance with standard practice, we have not inspected the Title Deeds and assume they contain no unusual or onerous rights, restrictions, obligations, or other clauses of an onerous nature affecting a disposal in the Open Market or use to which the sites may be put.

6. Location

Chamberhall Business Park is an existing business park situated within walking distance of the town centre of Bury, which is approximately ½ mile to the east. Access to the site is via Harvard Road, which is just off the A56/A58 intersection. The closest motorway connection is Junction 2 of the M66 motorway, which is approximately 2 miles to the east. Bolton is approximately 5.5 miles to the west.

The site is just to the north of Bury Police Station and has roads to four sides. A Location Plan and Google Earth Plan showing the boundaries of the sites are attached at **Appendix 2**.



(Location Plan)

7. Description

The site comprises of an area of self-seeded grassland and shrubs surrounding a SUDS pond, which is used by the adjacent Chamberhall Phase 1 and the relatively new Police and Fire Stations, LGC, and MKM.

We understand that the site has had previous use and is not greenfield as such but has rewilded over a period of years. The site is generally 'L-shaped,' with the main bulk of the site being towards the west.

8. Areas

The site measures approximately 7.8 acres (3.15 hectares).

We are informed that the net developable acreage is 5.3 acres (2.14 hectares) approximately.

Three proposed development schemes are attached in Appendix 3. The first scheme comprises a purely industrial development providing a total of 81,253 sq ft of industrial accommodation, measured on a gross internal area basis. The second and third scheme comprises 48,800 sq ft of office accommodation together with 25,000 sq ft of industrial accommodation, both measured on a gross external area basis, equating to approximately 41,480 sq ft and 22,500 sq ft respectively on a gross internal basis.

9. Tenancies & Other Agreements

We have not been advised of any existing or proposed leases, tenancy agreements, management contracts, or franchises affecting the sites.

10. Services

We understand there are no services laid within the site except for the stormwater connection pipes to the sustainable urban drainage pond. Services are available in the main roads and footpaths.

11. Site & Ground Conditions

The site extends to approximately 7.8 acres (3.15 hectares) gross, as shown edged red on the attached plan, see **Appendix 2**.

We have researched the Environment Agency's (EA) website, which indicates that part of the site is within an area with potential for surface water flooding, **See Appendix 4**.

Please note that the Environment Agency online flood map covers only risks from rivers or coastal flooding, not ground or surface water or vulnerability to dam or reservoir bursts. Commercial flood search engines are available, which we understand offer greater accuracy, and applicants may consider the extra expense of such a search worthwhile. In the case of the subject sites, we assume that flood insurance is available on normal terms.

(Site Plan)

The site layout provided is for demonstration purposes only and may not reflect the actual configuration of the unit. The client is advised to verify the actual layout of the unit directly with the relevant parties or professionals. No liability is accepted for discrepancies between the demonstrated layout and the actual layout.

11.1 Mine workings

The subject sites are in an area identified by the Coal Authority as having been subject to mining. Accordingly, we would recommend that your solicitor obtains

a mining report from the Coal Authority so that the associated risks can be quantified. Once known, we would be pleased to comment on their likely impact on the site's value.

12. Statutory Requirements

12.1 Other Certificates

We have assumed that the sites fully comply with all current health & safety, environmental health and other regulations, including the certification of gas and electrical installations.

13. Condition

This report does not purport to be a building survey, and we have not been instructed to carry out such a Survey and are unable to report any defects which may exist. Our comments on the condition of the sites are provided on the basis of what is seen from standing within the boundaries of the site and any adjoining public land and from standing within the various floor levels internally. We have not inspected those parts of the sites which were covered, inaccessible and such parts have been assumed to be in good repair and condition. We cannot express an opinion about, or advise upon, the condition of un-inspected parts and this Report should not be taken as making any implied representation or statement about such parts.

We have assumed that no high alumina cement, blue asbestos, or other deleterious materials have been used in the construction alteration or extension of any building and that no latent defects exist.

No allowance has been made for rights, obligation or liabilities arising under the Defective Premises Act 1972.

A phase 2 ground investigation was carried out. This showed that there was made ground within the site. The maximum depth was 7.5 metres. The southern portion of the site was found to have potential for landfill gas to be produced.

14. Environmental Issues

14.1 Contamination

Our enquiries have not revealed any contamination affecting the subject site or neighbouring property which would affect our valuation.

We are not aware of the content of any environmental audit or other environmental investigation or soil survey which may have been carried out on the subject site or neighbouring property, and which may draw attention to any contamination or the possibility of any such contamination.

In undertaking our work, we have assumed that no contaminative or potentially contaminative uses have ever been carried out in the site or neighbouring land. We have not carried out any investigation into past or present uses, either of the subject site or of any neighbouring land, to establish whether there is any potential for contamination to the subject site from these uses or sites and have therefore assumed that none exists. However, should it be established subsequently that contamination exists at the site or on any neighbouring land, or that the premises have been or are being put to a contaminative use, this might reduce the values now reported. In such circumstances, we would require the opportunity to reconsider the advice contained herein. We are aware that a Phase 1 Soil Investigation Report (desktop) suggested made ground potential for gas emissions and difficult subsoil conditions.

15. Sustainability

Attention is drawn to VPS 2 paragraph 1.5 and the fact that, wherever appropriate, the relevance and significance of sustainability and environmental matters may or will be an integral part of the valuation approach and reasoning.

While not a term that yet has a universally recognised definition, in a valuation context, sustainability encompasses a wide range of physical, social, environmental, and economic factors that can affect value and of which valuers should be aware.

Consider:

- This is a site that was previously occupied by two reservoirs from 1849 up until approximately 1937. These were infilled in the 1970's and 1980's and therefore, the site has potentially a significant amount of made ground.
- A site constraints plan has been produced by another firm of surveyors, and this is attached as **Appendix 5**. The pond that was created on site in the 1970s/1980s now forms the main sustainable urban drainage pond for the whole business park.

- The Phase 1 Soil Investigation Report and evidence collected from other nearby sites would suggest that the site is made ground with a number of technical constraints, and a full intrusive site survey will be required prior to development.

- The site has potential for ground gas emissions.

16. Town Planning

We have made internet enquiries only of the Local Planning Authority, Bury Council.

We have valued assuming planning consent for the existing use and that a detailed planning application will be required.

Decision Date	Address	Description	Status/ Decision	Ref
17/06/2009	Chamberhall Business Park BL9 0LN	500 METRES OF HIGHWAY WITH 2X 3.65M WIDE LANES AND 3.0M WIDE FOOTWAYS.	Approved	51242
18/09/2008	Chamberhall Business Park Castlecroft Road Bury	RESTORATION OF OPEN WATER COURSE LANDSCAPE FEATURE, TO INCLUDE SUDS REGIME WILDLIFE HABITAT IMPROVEMENT AND CREATION OF EARTH BUND FROM EXCAVATION ARISINGS TO ENCLOSE AND SCREEN DEVELOPMENTS FROM NEIGHBOURING PUBLIC HIGHWAY	Approved	50163

The sites are not shown on the proposals map as being within a conservation area and are not listed.

In the time available for this report, we have not made formal enquiries of the Highway Authority but, as far as we are aware, Harvard Road is an adopted highway maintainable at public expense. The sites do not have a current planning permission for the proposed scheme.

17. Taxation

No allowance has been made for liability for taxation which may arise on disposal, whether actual or notional.

18. Current Market Conditions

18.1 General Comments

- Real Gross Domestic Product (GDP) is estimated to have grown by 0.1% in Quarter 3 after growth of 0.3% in the three months to August 2025. GDP is estimated to have increased by 1.2% in Quarter 2 2025 compared with the same quarter a year ago.

- Inflation currently stands at 3.8% as at September 2025, which is above the Bank of England target level of 2%.

- The current bank base interest rate remains at 4.%. This was held on the 6th November 2025. The next review is the 18th December 2025.

- The economy is therefore in a period of virtual stagnation and consequently, market confidence is limited.

19. General Observations

19.1 This is an attractive development site which appears to be greenfield in nature and is situated adjacent to a successful and relatively recent business park developed by St. Modwen Properties, and relatively new police and fire stations.

19.2 The site was reclaimed some considerable time ago from its previous quasi-industrial use and has remained fallow ever since, with the exception that the adjacent SUDS.

19.3 There is a mixed-use scheme proposed offices and industrial accommodation and a purely industrial scheme. The remainder of the land is to remain undeveloped to enable maintenance of the SUDS pond.

19.4 Currently there are no new speculative offices being built north of Manchester city centre due to a lack of viability and demand for office accommodation. There has only been one scheme built since the banking crisis of 2008 – 2010. This was in Hollinwood, Oldham. Rents at that scheme in Hollinwood achieved £20.00 psf per annum and Nolan Real Estate acted as agents for the scheme.

19.5 The level of speculative construction has diminished significantly in the past few months, as confidence has eroded and there has been significant turbulence in the world economy.

19.6 We have been asked to provide our views with regard to a specific scheme for the site, one of the scheme is for purely industrial accommodation of 81,253 sq.ft and the other scheme is on the basis of construction of a headquarters office building of 41,480 sq.ft. gross internal, and an adjacent development of small industrial units amounting to 22,500 sq.ft.

20. Valuation Methodology

20.1 We have produced a residual valuation for each of the schemes individually, but these have been produced by using various assumptions which have not, in general terms, been market tested. We have obtained our building costs from the BCIS Index, which is standard practice.

20.2 The conclusions we have reached cannot be classed as fully definitive as the site may have potential for an alternative scheme or use, as this is not part of this exercise.

When assessing the site's market value, we note that the extent of abnormal or hidden site costs remains uncertain. Such unforeseen constraints commonly deducted by developers when negotiating conditionally, which may reduce the achievable land value. Our valuation is based on standard assumptions, and any additional abnormal costs identified later may materially affect the appraisal.

20.3 Please note that when collecting the transactional market evidence, we were unable to obtain many comparables for the Gross Development Value, partly as a consequence of the site's size, location, and type. Therefore, in accordance with the International Valuation Council Standards and the Royal Institution of Chartered Surveyors Valuation – Global Standards effective 31 January 2025 incorporating the UK National Supplement, published by the Royal Institution of Chartered Surveyors, we would draw your attention to Valuation Practice Guidance – Application 10 (VPGA 10), "matters that may give rise to material valuation uncertainty." We make reference to this VPGA given the lack of reported market activity within this location. Our opinion of Market Value is based upon our professional knowledge and experience within the marketplace.

20.4 We have produced development appraisals by adopting the residual valuation for all schemes. We have used construction figures from the BCIS Index and a list of assumptions used within the appraisals are attached at **Appendix 6**. We have allowed nil developers' profit on the proposed units, as we understand there is no intention to sell or let the completed scheme. The purpose of these appraisals is to consider the feasibility assessment of the proposed schemes rather than to provide mortgage or market value exercises, as there are a significant number of assumptions which we have had to make.

20.5 Assumptions for the Residual calculations

Scheme 1 – Industrial Accommodation for the whole site

Gross Internal Area	81,253 sq.ft.
Market Rent	Average £12.20 psf, as achieved in the locality
Capitalisation Yield	Varies from 6.5% to 7.5% for different size
Stamp Duty	£0
Construction Costs	Average £132 psf (in GIA) (via BCIS)
Section 106 Cost	£50,000
Section 278 Off-site Highways Cost	£150,000
BNG Contribution	£250,000
Finance at 7.5%	£1,000,000
Acquisition Cost	£200,000
Disposal Fees	£210,000

Scheme 2 –Office Accommodation for Plot 1

Gross External Area	48,800 sq.ft.
Gross Internal Area	41,480 sq.ft.
Market Rent	£20.00 psf – as achieved on the Mills development in Hollinwood, Oldham
Capitalisation Yield	7%
Stamp Duty	£0
Construction Costs	£209.00 psf (in GEA) (via BCIS)
Section 106 Cost	£25,000
Section 278 Off-site Highways Cost	£75,000
BNG Contribution	£250,000
Finance at 7.5%	£1,000,000
Acquisition Cost	£160,000
Disposal Fees	£180,000

Scheme 3 –Industrial Accommodation for Plot 2

Gross External Area	25,000 sq.ft.
Gross Internal Area	22,500 sq.ft.
Market Rent	£12.00 psf
Capitalisation Yield	7.0%
Stamp Duty	£0
Construction Costs	£107.00 psf (in GEA) (via BCIS)
Section 106 Cost	£25,000
Section 278 Off-site Highways Cost	£75,000
BNG Contribution	£250,000
Finance at 7.5%	£290,000
Acquisition Costs	£160,000
Disposal Fees	£58,000

20.6 Special Assumptions

For the purpose of this valuation, we have adopted the special assumption that the proposed development will be completed in accordance with the proposed development site plans in **Appendix 3** and that such specification will be consistent with the quality expected by the target market and comparable new developments within the locality. Should the actual specification or any development detail differ from the information supplied, our opinion of value may be affected, and this valuation may require amendment. We recommend that your legal advisers verify all development details prior to reliance on this report.

It is further assumed that the completed development will achieve a high standard of workmanship, providing finishes commensurate with newly built office units and industrial units in the area, with no material defects or items requiring repair that could adversely impact marketability or saleability. We also assume that project funding will be appropriately managed to maintain construction quality throughout the build period. Where regular drawdowns are anticipated, we recommend the appointment of a monitoring surveyor.

21. Valuations

21.1 Market Value

In our opinion, the Market Value of the interest in the above sites with vacant possession, as at the date of valuation, is:

1) **The Market Value of the Whole Site**

Valuation of the whole site subject to the proposed industrial development is a negative figure of **-£1,150,000 (Minus One Million, One Hundred and Fifty Thousand Pounds)**

2) **The Market Value of Plot 1**

Valuation of Plot 1 subject to the proposed office development is a negative figure of **-£2,590,000 (Minus Two Million, Five Hundred and Ninety Thousand Pounds).**

3) **The Market Value of Plot 2**

Valuation of Plot 2 subject to the proposed industrial development is negative figure of **-£348,000 (Minus Three Hundred and Forty-Eight Thousand Pounds) –** see attached development appraisals at **Appendix 7**.

22. Valuer

The valuation has been carried out by an Independent Valuer.

23. Conclusion

We hope we have covered everything in sufficient detail but if you would like to discuss any particular item please do not hesitate to contact me.

As the development is at a preliminary concept stage, we recommend that further surveys and professional advice are obtained. We should be notified of any site constraint findings as these may have a material impact on the valuation.

Finally, and in accordance with standard procedure, we advise that this Report is confidential and is prepared for your use only and no responsibility is accepted for its use, in whole or in part, by any third party without our prior written consent.

Neither the whole nor part of this Report or any reference hereto may be included in any published document, circular or statement nor published in any way without our prior written approval.

Dated this 18th day of November 2025

Signed .....

Paul Nolan BSc (Hons) FRICS
RICS Registered Valuer
For and on behalf of Nolan Real Estate
Haweswater House
Waterfold Business Park
Bury
Greater Manchester
BL9 7BR

Appendices

Appendix 1

TERMS OF ENGAGEMENT

Nolan Redshaw
Terms of Engagement for the Valuation of Business Premises

---

1. **The Client**

Bury Council
Town Hall
Knowsley Street
Bury
Greater Manchester
BL9 0SW

2. **The Valuation Provider**

Nolan Redshaw Limited
Haweswater House
Waterfold Business Park
Bury
BL9 7BR

3. **The Property**

Two Sites at Chamberhall Business Park, Harvard Road, Greater Manchester, BL9 0JU.

4. **Brief Description of the Property**

Two parcels of land.

5. **Purpose of the Valuation**

Potential sale of the land by the Council.

6. **The Valuer**

6.1 Name & Qualifications

The valuation will be reported by Paul Nolan BSc (Hons) FRICS, RICS Registered Valuer and Director of Nolan Redshaw Limited acting for and on behalf of the company.

6.2 Knowledge & Skills

In addition to the necessary qualifications, the Valuer has the knowledge and skills to report the valuation.

6.3 Status of Valuer

The Valuer is an External Valuer and will act with independence, integrity and objectivity.

6.4 Previous Involvement and Conflicts of Interest

Nolan Redshaw Limited has had no previous involvement with the property and does not have any conflicts of interests.

7. The Report

7.1 RICS Valuation – Professional Standards, 2025

In making the report, we will meet the relevant requirements of the *RICS Valuation – Professional Standards,* 2025 and the *UK National Supplement.*

7.2 Description

The report will cover all those matters specified in VPS 3.2 of the *RICS Valuation – Professional Standards*, 2025.

8. Interest to be Valued

Assumed freehold.

9. Date of Valuation

The date of the Report.

10. Bases of Value

10.1 Market Value

Market Value is defined in VPS 4.4 of the *RICS Valuation – Professional Standards,* 2025:

The estimated amount for which an asset or liability should exchange on the valuation date between a willing buyer and a willing seller in an arm's length transaction after proper marketing and where the parties had each acted knowledgeably, prudently and without compulsion.

11. Costs and Taxes

In reporting the Valuation on the stated bases, we will make no allowance for any costs of any transaction or for taxation that may arise.

12. Inspection and Investigations

12.1 The Valuer shall:

(a) carry out such inspections and investigations as are, in his professional judgement, appropriate and possible in the particular circumstances in order to produce a valuation which is professionally adequate for its purpose;
(b) rely upon information provided by the client or the client's legal or other professional advisers relating to tenure, tenancies and other relevant matters; and

(c) inspect so much of the exterior and interior of the property as is accessible with safety and without undue difficulty, as can be seen whilst standing at ground level within boundaries of the site and adjacent public/communal areas and whilst standing at the various floor levels.

12.2 The Valuer shall not:

(a) carry out a building survey, asbestos survey, fire risk assessment, access audit or energy performance survey;
(b) inspect roof-voids and under-floor voids;
(c) inspect cellars and basements with unsafe access;
(d) inspect woodwork, steelwork or other parts of the structure which are covered, unexposed or inaccessible;
(e) move furniture and effects;
(f) lift floor coverings;
(g) arrange for the testing of electrical, plumbing, heating or other services;
(h) carry out investigations to determine whether or not any deleterious or hazardous materials or techniques have been used in the construction of the property or have since been incorporated;
(i) make enquiries into town planning and other matters, nor
(j) make any enquiries regarding contamination or other environmental hazards.

13. Valuation Assumptions

In making the report we will make the following assumptions which we will be under no duty to verify:

(a) good title can be shown, and the property is not subject to any unusual or especially onerous restrictions, encumbrances or outgoings;
(b) all required, valid planning permissions and statutory approvals for the building and for its use, including any extensions or alterations, have been obtained and complied with;
(c) no deleterious or hazardous materials have been used in the construction;
(d) an inspection of those parts which have not been inspected, or a building survey, asbestos survey, fire risk assessment, access audit or energy performance survey, would not reveal material defects or cause the valuer to alter the valuation;
(e) the testing of electrical, plumbing, heating or other services would not reveal defects or deficiencies that would cause the valuation to alter;
(f) there is unrestricted access to the property, and the property is connected to, and there is the right to use, the reported main services on normal terms;
(g) sewers, main services and the roads giving access to the property have been adopted;
(h) the property is unaffected by any town planning or other matters;
(i) the site is not contaminated and is free from other environmental hazards;
(j) the property and its value are unaffected by any matters which would be revealed by a local search, replies to the usual pre-contract enquiries, or by any statutory notice which may indicate that neither the property, nor its condition, its use, or its intended use, is or will be unlawful; and
(k) there is no ongoing insurance claim or neighbour disputes.

14. Special Assumptions

In addition to the Bases of Value in Section 10 above, valuation will also be reported on the Special Assumption(s) of: N/A.

15. Confidentiality

The report will be provided for the stated purpose and for the sole use of the named client. It will be confidential to the client and their professional advisers. Nolan Redshaw Limited accepts responsibility to the client alone that the report will be prepared with the skill, care and diligence reasonably to be expected of competent chartered surveyors but accept no responsibility whatsoever to any parties other than the client. Any such parties rely upon the report at their own risk.

16. Publication

Neither the whole nor any part of the report nor any reference to it may be included in any published document, circular or statement nor published in any way without Nolan Redshaw Limited's written approval of the form and context in which it may appear.

17. Complaints Handling Procedure

Nolan Redshaw Limited operates a complaints handling procedure that complies with RICS Rules of Conduct. A copy of this procedure is available upon request.

18. Monitoring

This Valuation may be monitored by the RICS under the institution's conduct and disciplinary regulations.

19. Limitations on Liability

Nolan Redshaw Limited have Professional Indemnity Insurance up to a maximum of £5,000,000 for each and every claim and are only liable in respect of any cost or claim up to this level. This is a strict liability and no liability for any cost or claim can be given beyond this figure.

20. Fee

The client will pay a fee of £8,500.00 plus VAT, inclusive of disbursements within 28 days of the date of the report.

21. **Signature of Client confirming agreement to these Terms of Engagement:**

We trust these Terms of Engagement are agreeable to you and, as required by the RICS, please can you return them to us, signed and dated, so that we may commence the valuation instruction. We cannot proceed until signed terms are returned to us.

Client Name: .....

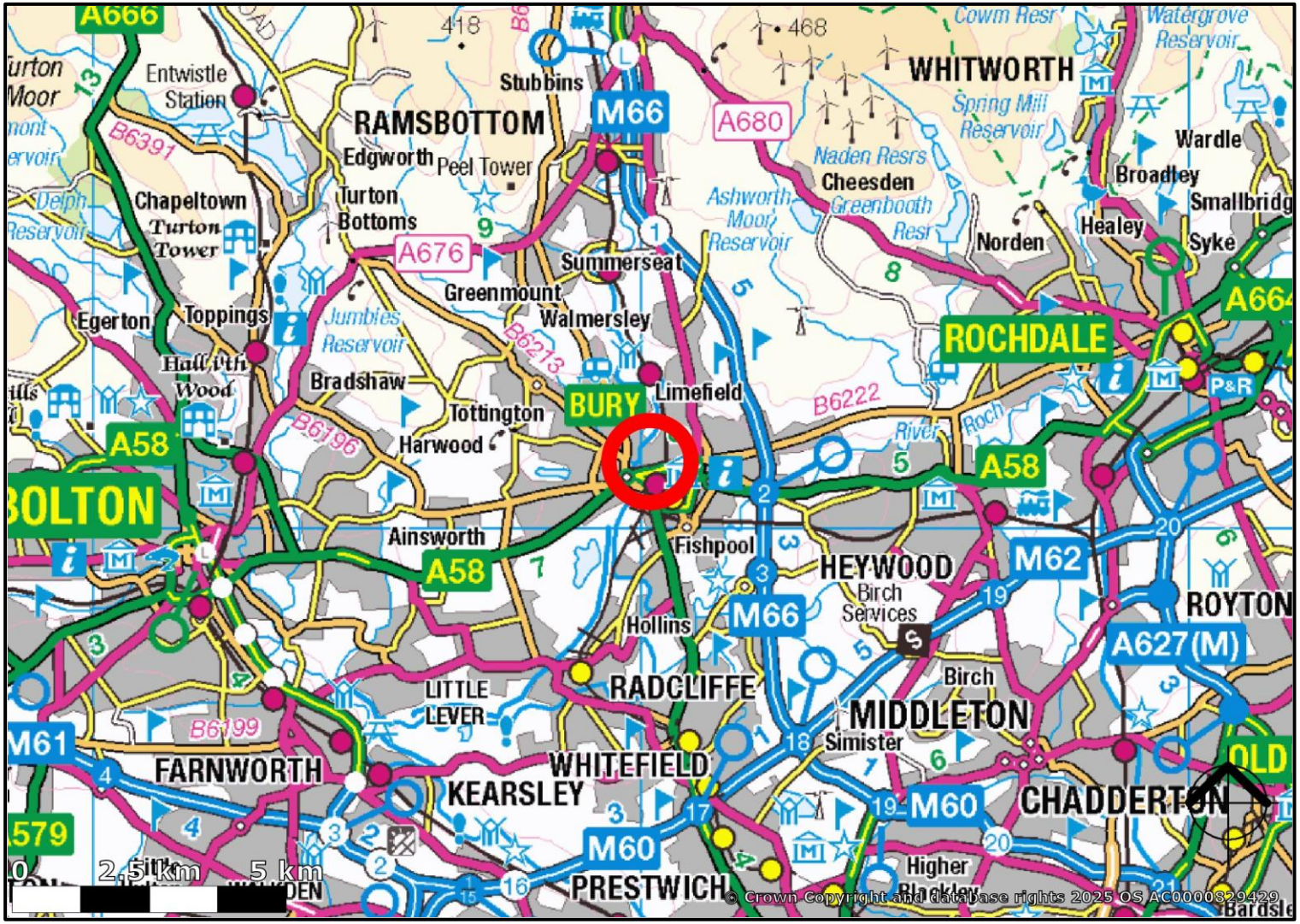
Signature: .....

22. **Date of Signature:**

Date: .....

Appendix 2

LOCATION PLANS, SITE PLAN & GOOGLE EARTH PHOTOGRAPH


A666
Entwistle Station
RAMSBOTTOM
Stubbins
M66
A680
WHITWORTH
Cowm Resr
Watergrove Reservoir
Spring Mill Reservoir
Naden Resrs
Cheesden
Greenbooth Resr
Ashworth Moor Reservoir
Wardle
Broadley
Smallbridge
Healey
Syke
Norden
Edgworth
Peel Tower
Turton Bottoms
Chapeltown
Turton Tower
A676
Summerseat
Greenmount
Walmersley
Egerton
Toppings
Jumbles Reservoir
B6213
ROCHDALE
A664
P&R
Bradshaw
Limefield
BURY
B6222
Tottington
Harwood
B6196
A58
BOLTON
Ainsworth
Fishpool
HEYWOOD
Birch Services
M62
ROYTON
A627(M)
Hollins
M66
LITTLE LEVER
RADCLIFFE
MIDDLETON
Birch
Simister
B6199
M61
FARNWORTH
WHITEFIELD
KEARSLEY
M60
CHADDERTON
PRESTWICH
Higher Blackley
2.5 km
5 km
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(City Map)

(Location Plan)

Bury Community
Fire Station
MAGDALENE ROAD
Pond
El Sub Sta
El Sub Sta
CASTLECROFT ROAD
Travelling Crane
HARWARD ROAD
DUNSTER ROAD
0
50 m
100 m
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(Site Plan)

(Google Earth Image)

Appendix 3

PROPOSED DEVELOPMENT PLAN

Option 2

13540-AEW-SI-XX-DR-A-0004-P03

SCHEDULE OF ACCOMMODATION				
Unit	Ground Floor GIA	First Floor (Offices) GIA	Overall GIA	Overall Parking (Inc. disabled provision)
01	2,074 m² / 22,300 ft²	238 m² / 2,562 ft²	2,312 m² / 24,862 ft²	35 (2)
02A	139 m² / 1,494 ft²			
02B	139 m² / 1,494 ft²			
02C	139 m² / 1,494 ft²			
02D	139 m² / 1,494 ft²			
02E	139 m² / 1,494 ft²			
02F	139 m² / 1,494 ft²			
02G	139 m² / 1,494 ft²			
02H	139 m² / 1,494 ft²			
02J	139 m² / 1,494 ft²			
02K	139 m² / 1,494 ft²			
02L	139 m² / 1,494 ft²			
02M	139 m² / 1,494 ft²			
02N	139 m² / 1,494 ft²			
02P	139 m² / 1,494 ft²			
Unit 2 Total	1,946 m² / 20,916 ft²		1,946 m² / 20,916 ft²	32 (14)
03A	499 m² / 5,373 ft²	165m² / 1,776 ft²	664 m² / 7,149 ft²	
03B	329 m² / 3,537 ft²	110m² / 1,184 ft²	439 m² / 4,721 ft²	
03C	329 m² / 3,537 ft²	110m² / 1,184 ft²	439 m² / 4,721 ft²	
03D	329 m² / 3,537 ft²	110m² / 1,184 ft²	439 m² / 4,721 ft²	
03E	329 m² / 3,537 ft²	110m² / 1,184 ft²	439 m² / 4,721 ft²	
03F	329 m² / 3,537 ft²	110m² / 1,184 ft²	439 m² / 4,721 ft²	
03G	329 m² / 3,537 ft²	110m² / 1,184 ft²	439 m² / 4,721 ft²	
Unit 3 Total	2,473 m² / 26,595 ft²	825m² / 8,880 ft²	3,298 m² / 35,475 ft²	55 (4)
Overall Total	6,493 m² / 69,811ft²	1,063m² / 11,442ft²	**7,556m² / 81,253ft²**	122 (20)

Proposed Site Boundary = 5.27 acres = 2.13 ha

Ownership Boundary

Underground utilities / sewer and assumed easement

Existing Tree Root Protection Areas

revision notes

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rev	date	by	description
01:	__/__/__	__	original issue
02	22.11.24	jb	G&P headquarters increased in size. spec office building omitted. car parking layout increased to suit demand

proposed site layout plan 1:500

North

0 10 20 30 40 50m

scale 1:500

AREA SCHEDULE

Crown Gas & Power head office - 48,800sqft / 4,534m² GEA
193 total car parking spaces with
10 accessible spaces
20 EV charging spaces
10 cycle spaces
2 motor cycle spaces

B2 / B8 development
Unit A - 3,500sqft / 325m² GEA
Unit B - 3,500sqft / 325m² GEA
Unit C - 4,500sqft / 420m² GEA
Unit D - 4,500sqft / 420m² GEA
Unit E - 4,500sqft / 420m² GEA
Unit F - 4,500sqft / 420m² GEA
55 total car parking spaces with
6 accessible spaces
12 EV charging spaces
10 cycle spaces
2 motor cycle spaces

TOTAL - 25,000sqft / 2,330m²

cdp architects
campbell driver partnership
Suite 25, Unit 2
Northlight House
Pendle Road
Brierfield
Nelson
BB9 5FL
01254 297700
www.cdparchitects.co.uk

client: crown gas and power

project: crown gas and power office
dunster road, bury, BL9 0JU

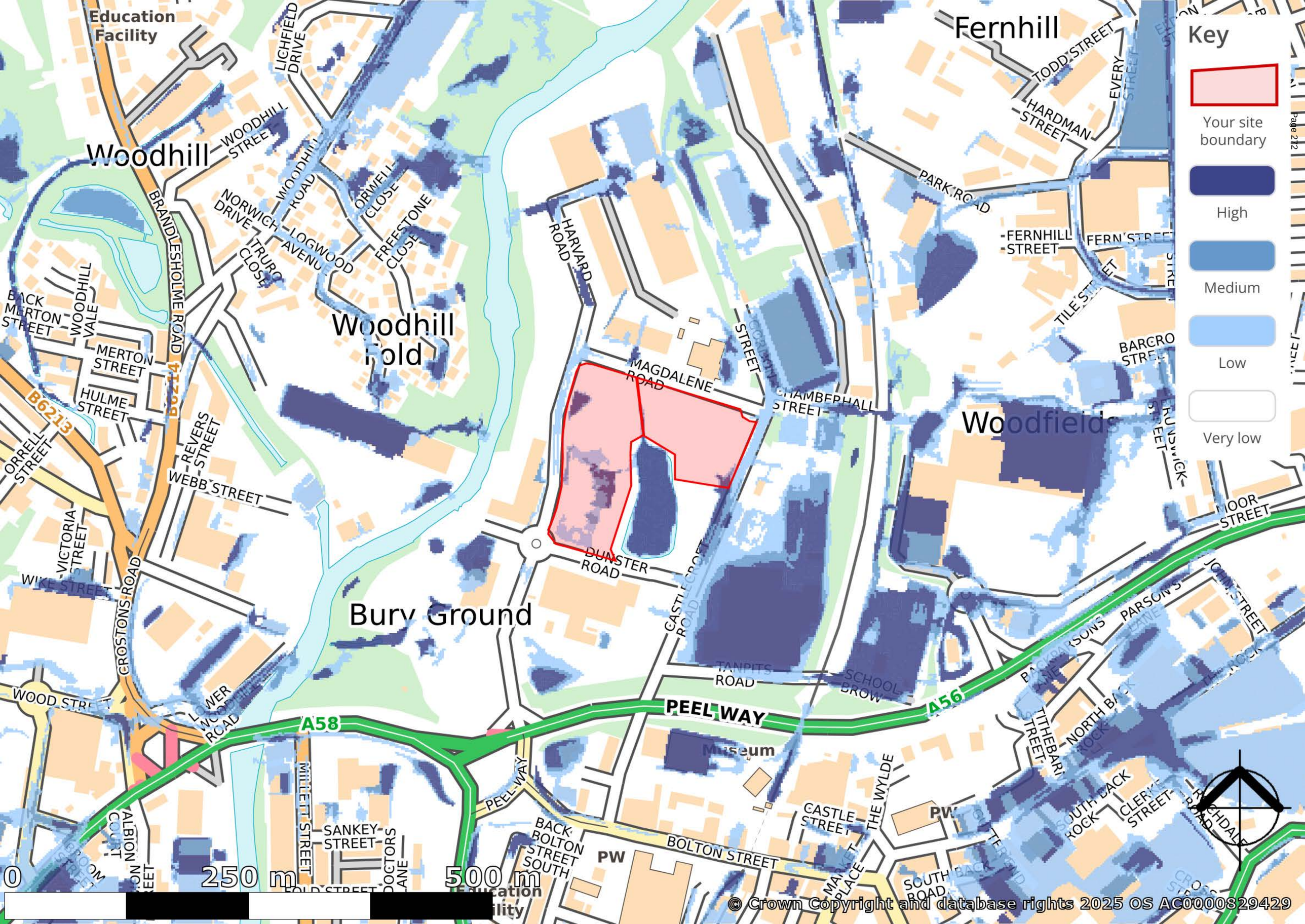
sheet: proposed site plan

drawing no:	project no.	originator	sheet	no.	vers.	dwg no.	revision
	24.180.00-CDP-00-DR-A-1003						P03

scale:	1:500 @ A1	status:	WIP
date:	21.11.24	drawn by:	JB

Appendix 4

SURFACE WATER MAP



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Appendix 5

SITE CONSTRAINT PLAN

Chamberhall Opportunities and Constraints

Opportunities	Constraints
1. Direct access to the A58 and A56.	1. Majority of the site is marshy grassland, BNG credits to be considered.
2. West side of the site is relatively level and therefore maybe suitable for development.	2. Category B trees may need to be retained (blue shade).
3. Multiple 'highly feasible' new highways access points to the site.	3. Category C trees may need to be retained (yellow shade).
4. Successful phase 1 adjacent to the property demonstrating demand.	4. Man made pond on site will make achieving an efficient site coverage challenging.
	5. Site levels drop significantly towards the pond.
	6. Surface water sewer to outfall into pond.
	7. Surface water sewer from pond to river.
	8. Capacity of the pond to accommodate surface water flows from the development should be assessed via a detailed assessment of the existing site drainage infrastructure during the development of site proposals.
	9. Area required for maintenance of the SuDS (Orange boundary)
	10. Easement to combined sewer (dotted purple line).
	11. Access to fire station down Magdalene Road will need to be maintained whilst works ongoing.
	12. Below green line considered too steep for access points for future dredging/reed clearance
	13. Pond is in flood zone 2, detailed flood risk assessment required.
	14. Majority of the site will require piling due to made ground.
	15. Potential contamination from historic uses – boreholes found limited asbestos.
	16. Himalayan Balsam – invasive species.

Appendix 6

BCIS ASSUMPTIONS

BCIS®

£/M2 STUDY

Description: Rate per m2 gross internal floor area for the building Cost including prelims.

Last updated: 01-Nov-2025 07:36

Rebased to Bury (101; sample 16)

MAXIMUM AGE OF RESULTS: DEFAULT PERIOD

Building function (Maximum age of projects)	£/m² gross internal floor area						Sample
	Mean	Lowest	Lower quartiles	Median	Upper quartiles	Highest	
New build							
282. Factories							
Generally (25)	1,389	302	750	1,097	1,664	5,013	110
Up to 500m2 GFA (25)	1,973	1,079	1,235	1,453	2,625	4,073	15
500 to 2000m2 GFA (25)	1,388	302	823	1,251	1,549	5,013	44
Over 2000m2 GFA (25)	1,218	447	663	911	1,479	4,659	51
282.1 Advance factories							
Generally (15)	1,104	447	870	1,096	1,399	1,693	17
Up to 500m2 GFA (15)	1,317	1,082	1,097	1,301	1,415	1,693	5
500 to 2000m2 GFA (15)	1,245	827	1,093	1,333	1,441	1,487	6
Over 2000m2 GFA (15)	784	447	670	800	904	1,096	6
282.12 Advance factories/offices - mixed facilities (class B1)							
Generally (20)	1,549	677	995	1,495	1,832	2,851	14
Up to 500m2 GFA (25)	2,556	2,095	-	2,687	-	2,886	3
500 to 2000m2 GFA (20)	1,602	1,331	-	1,659	-	1,813	3
Over 2000m2 GFA (20)	1,343	677	907	1,062	1,781	2,851	9

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BCIS®

Building function (Maximum age of projects)	£/m² gross internal floor area						Sample	
	Mean	Lowest	Lower quartiles	Median	Upper quartiles	Highest		
282.2 Purpose built factories								
Generally (30)	1,627	302	825	1,351	2,308	5,013	68	
Up to 500m2 GFA (30)	2,304	909	1,375	2,267	2,847	4,073	8	
500 to 2000m2 GFA (30)	1,770	302	921	1,449	2,496	5,013	21	
Over 2000m2 GFA (30)	1,411	439	736	1,233	1,911	4,659	39	
282.22 Purpose built factories/Offices - mixed facilities (15)	1,181	554	966	1,110	1,379	2,495	23	
284. Warehouses/stores								
Generally (15)	1,165	457	705	916	1,185	5,388	48	
Up to 500m2 GFA (15)	2,209	767	1,148	1,413	2,799	5,388	7	
500 to 2000m2 GFA (15)	1,046	545	821	956	1,147	1,872	15	
Over 2000m2 GFA (15)	953	457	671	770	1,091	2,574	26	
284.1 Advance warehouses/stores (15)	856	473	697	816	1,089	1,207	9	
284.2 Purpose built warehouses/stores								
Generally (15)	1,244	457	722	931	1,354	5,388	37	
Up to 500m2 GFA (15)	2,633	767	1,413	2,238	3,358	5,388	5	
500 to 2000m2 GFA (15)	1,043	545	780	944	1,163	1,872	14	
Over 2000m2 GFA (15)	1,015	457	684	779	1,112	2,574	18	
284.5 Cold stores/refrigerated stores (30)	1,601	1,091	1,183	1,391	2,168	2,174	5	
320. Offices								
Generally (15)	2,454	1,198	1,858	2,435	2,870	3,825	30	
Air-conditioned								
Generally (15)	2,332	1,438	2,009	2,382	2,777	2,888	11	
1-2 storey (15)	2,147	1,438	1,959	2,136	2,327	2,879	6	

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BCIS®

Building function (Maximum age of projects)	£/m² gross internal floor area						Sample	
	Mean	Lowest	Lower quartiles	Median	Upper quartiles	Highest		
3-5 storey (15)	2,519	1,635	-	2,777	-	2,888	4	
6 storey or above (20)	2,769	2,072	2,506	2,672	2,866	3,897	7	
Not air-conditioned								
Generally (15)	2,570	1,198	1,858	2,582	3,183	3,825	14	
1-2 storey (15)	2,762	1,640	2,199	2,690	3,421	3,825	11	
3-5 storey (20)	2,311	1,198	1,689	2,224	2,809	4,055	22	
6 storey or above (25)	2,851	2,210	-	2,947	-	3,300	4	

© BCIS 2025

BCIS®

£/M2 STUDY

Description: Rate per m2 gross internal floor area for the building Cost including prelims.

Last updated: 01-Nov-2025 07:36

Rebased to Bury (101; sample 16)

MAXIMUM AGE OF RESULTS: DEFAULT PERIOD

Building function (Maximum age of projects)	£/m² gross internal floor area						Sample	
	Mean	Lowest	Lower quartiles	Median	Upper quartiles	Highest		
New build								
320. Offices								
Generally (15)	2,454	1,198	1,858	2,435	2,870	3,825	30	
Air-conditioned								
Generally (15)	2,332	1,438	2,009	2,382	2,777	2,888	11	
1-2 storey (15)	2,147	1,438	1,959	2,136	2,327	2,879	6	
3-5 storey (15)	2,519	1,635	-	2,777	-	2,888	4	
6 storey or above (20)	2,769	2,072	2,506	2,672	2,866	3,897	7	
Not air-conditioned								
Generally (15)	2,570	1,198	1,858	2,582	3,183	3,825	14	
1-2 storey (15)	2,762	1,640	2,199	2,690	3,421	3,825	11	
3-5 storey (20)	2,311	1,198	1,689	2,224	2,809	4,055	22	
6 storey or above (25)	2,851	2,210	-	2,947	-	3,300	4	

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Appendix 7

DEVELOPMENT APPRAISALS

APPRAISAL SUMMARY **NOLAN REAL ESTATE**

Two sites at Chamberhall Business Park, Harvard Road, Bury, BL9 0JU

Summary Appraisal for Plot 2 Industrial use

Currency in £

REVENUE

Rental Area Summary

Item	Sq.ft (GIA) *R2	Rental Rate (£ psf)	Markert Rent per annum	
6 industrial units	22,500	£12	£270,000	£270,000

Investment valuation	Markert Rent per			Gross Development Value
6 industrial units	270,000	YP@7%	14.29	£3,857,143

GROSS DEVELOPMENT VALUE	**£3,857,143**
Stamp Duty	**£0**
NET REALISATION	**£3,857,143**

OUTLAY

ACCQUISITION COSTS				
Fixed Price *R1			£1	
Legal Fee			£20,000	
Planning Application Fee			£20,000	
Planning Consultation Fee			£80,000	
Survey			£40,000	
				£160,001
	Sq.ft (GEA) *	Unit Rate (£ psf) *R3	Cost	
CONSTRUCION COST				
Construction				
Corwn Gas & Power Head Office (over 3 storeys)	25,000	107	£2,675,000	
Preliminaries, overheads and profit		15%	£401,250	
Contingency		5%	£133,750	
				£3,210,000
PROFESSIONAL FEES				
professional fee		5%	£133,750	**£133,750**
DISPOSAL FEES				
Sale Agent Fee		1.0%	£38,571	
Sale Legal Fee		0.5%	£19,286	**£57,857**
SECTION 106 COSTS *R4				
Section 106 Costs			£25,000	**£25,000**
SECTION 278 COSTS *R4				
Section 278 Costs			£75,000	**£75,000**
OTHER COSTS				
BNG			£250,000	**£250,000**
FINANCE COSTS				
Debit Rate 7.500%, Credit Rate 0.000% (Nominal)		7.5%	£293,371	**£293,371**
TOTAL COSTS				**£4,204,979**
PROFITS				**-£347,836**

Performance Mesures	
Profit on Cost %	-8.27%
Profit on GDV%	-9.02%
Profit on NDV%	-9.02%
IRR * R5	-1%

Valuation Note

R1- We have assumed that £1 for the land value and hence the stamp duty is nil.

R2- The proposed area provided by client is in GEA, we have assumed that the conversion rate from GEA to GIA is 90%.

R3- Due to the made ground of the subject, we have asssumed the 5% allowance to the construction cost based on BCIS with the traditional method.

R4- We understand from the client that the Section 106 and Section 278 agreements have not yet been finalised. Accordingly, we have included allowances to reflect the potential associated costs.

R5- We have assumed the construction period for 1 year.

APPRAISAL SUMMARY **NOLAN REAL ESTATE**

Two sites at Chamberhall Business Park, Harvard Road, Bury, BL9 0JU

Summary Appraisal for the Industrial scheme for the whole site

Currency in £

REVENUE

Rental Area Summary

Item	Sq.ft (GIA)	Rental Rate (£ psf)	Markert Rent per annum	
Unit 1 - 1 no. of 2 storeys industrial unit	24,862	£11.5	£285,913	£285,913
Unit 2 - 14 nos of small industrial units (1,494 sq.ft for each unit)	20,916	£13.5	£282,366	£282,366
Unit 3 - 7 nos of medium 2 storeys industrial units (size range from 4,721 to 7,149 sq.ft for each unit)	35,475	£12.0	£425,700	£425,700
Total:	**81,253**	**£12.2**	**£993,979**	**£993,979**

Investment valuation	Markert Rent per			Gross Development Value
Unit 1	285,913	YP@6.5%	15.38	£4,398,662
Unit 2	282,366	YP@7.5%	13.33	£3,764,880
Unit 3	425,700	YP@7%	14.29	£6,081,429

GROSS DEVELOPMENT VALUE **£14,244,970**

Stamp Duty **£0**

NET REALISATION **£14,244,970**

OUTLAY

ACCQUISITION COSTS

Fixed Price *R1	£1	
Legal Fee	£50,000	
Planning Application Fee	£40,000	
Planning Consultation Fee	£80,000	
Survey	£80,000	
		£250,001

	Sq.ft (GIA)	Unit Rate (£ psf)	Cost	
CONSTRUCION COST *R2				
Construction				
Industrial Unit 1	24,862	131	£3,256,922	
Industrial Unit 2	20,916	135	£2,823,660	
Industrial Unit 3	35,475	131	£4,647,225	
Total:	**81,253**	**132**	**£10,727,807**	
Preliminaries, overheads and profit		15%	£1,609,171	
Contingency		5%	£536,390	
				£12,873,368
PROFESSIONAL FEES				
professional fee		5%	£536,390	**£536,390**
DISPOSAL FEES				
Sale Agent Fee		1.0%	£142,450	
Sale Legal Fee		0.5%	£71,225	**£213,675**
SECTION 106 COSTS *R3				
Section 106 Costs			£50,000	**£50,000**
SECTION 278 COSTS *R3				
Section 278 Costs			£150,000	**£150,000**
OTHER COSTS				
BNG			£250,000	**£250,000**
FINANCE COSTS				
Debit Rate 7.500%, Credit Rate 0.000% (Nominal)		7.5%	£1,074,258	**£1,074,258**
TOTAL COSTS				**£15,397,692**
PROFITS				**-£1,152,722**

Performance Mesures

Profit on Cost %	-7.49%
Profit on GDV%	-8.09%
Profit on NDV%	-8.09%
IRR * R4	-1%

Valuation Note

R1- We have assumed that £1 for the land value and hence the stamp duty is nil.

R2- Due to the made ground of the subject, we have asssumed the 5% allowance to the construction cost based on BCIS with the traditional method.

R3- We understand from the client that the Section 106 and Section 278 agreements have not yet been finalised. Accordingly, we have included allowances to reflect the potential associated costs.

R4- We have assumed the construction period for 2 year.

APPRAISAL SUMMARY				NOLAN REAL ESTATE
Two sites at Chamberhall Business Park, Harvard Road, Bury, BL9 0JU				
Summary Appraisal for Plot 1 Office use				
Currency in £				
REVENUE				
Rental Area Summary				
Item	Sq.ft (GIA) *R1	Rental Rate (£ psf)	Markert Rent per annum	
Crown Gas & Power Head Office	41,480	£20	£829,600	£829,600
Investment valuation	Markert Rent per annum			Gross Development Value
Current Rent for Corwn Gas & Power	829,600	YP@7%	14.29	**£11,851,429**
GROSS DEVELOPMENT VALUE				**£11,851,429**
Stamp Duty				**£0**
NET REALISATION				**£11,851,429**
OUTLAY				
ACCQUISITION COSTS				
Fixed Price			£1	
Legal Fee			£20,000	
Planning Application Fee			£20,000	
Planning Consultation Fee			£80,000	
Survey			£40,000	
				£160,001
	Sq.ft (GEA)	Unit Rate (£ psf) *R2	Cost	
CONSTRUCION COST				
Construction				
Crown Gas & Power Head Office	48,800	209	£10,199,200	
Preliminaries, overheads and profit		15%	£1,529,880	
Contingency		5%	£509,960	
				£12,239,040
PROFESSIONAL FEES				
professional fee		5%	£509,960	**£509,960**
DISPOSAL FEES				
Sale Agent Fee		1.0%	£118,514	
Sale Legal Fee		0.5%	£59,257	**£177,771**
SECTION 106 COSTS *R3				
Section 106 Costs			£25,000	**£25,000**
SECTION 278 COSTS *R3				
Section 278 Costs			£75,000	**£75,000**
OTHER COSTS				
BNG			£250,000	**£250,000**
FINANCE COSTS				
Debit Rate 7.500%, Credit Rate 0.000% (Nominal)		7.5%	£1,007,758	**£1,007,758**
TOTAL COSTS				**£14,444,530**
PROFITS				**-£2,593,102**
Performance Mesures				
Profit on Cost %				-17.95%
Profit on GDV%				-21.88%
Profit on NDV%				-21.88%
IRR * R4				-6%

Valuation Note

R1- We have assumed that £1 for the land value and hence the stamp duty is nil.

R2- The proposed area provided by client is in GEA, we have assumed that the conversion rate from GEA to GIA is 90%.

R3- Due to the made ground of the subject, we have asssumed the 5% allowance to the construction cost based on BCIS with the traditional method.

R4- We understand from the client that the Section 106 and Section 278 agreements have not yet been finalised. Accordingly,

R5- We have assumed the construction period for 1 year.

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[redacted]

From: [redacted]
Sent: 11 December 2025 09:37
To: [redacted]
Cc: [redacted]
Subject: [EXTERNAL] RE: Chamberhall

CAUTION: This email originated from outside the organisation. Be cautious of the email content, if in doubt do not click on any links or open any attachments.

Hi [redacted]

Yes - We have seen a phase one ground investigation report which shows areas of made ground across the site. So it is expected that there will be a cost to a developer to remediate the site before it can be developed. However, we have not been provided with a report which provides an estimate of these costs and estimating costs for adverse Ground Conditions is outside my area of expertise. Our report recommends that further investigation is undertaken and the costs would need to be deducted from the sale price.

Typically the buyer/ developer will undertake the investigations (as these will need to be known as part of the development process) and then provide the report / costs to remediate to the land owner in an open book process and these costs are deducted from the gross sale price which has already been agreed eg £1.85m less costs.

Regards
[redacted]

[redacted]
CBRE | National Valuation & Advisory Services
One St Peters Square | Manchester | M2 3DE
[redacted] cbre.com |

Follow CBRE: cbre.co.uk | LinkedIn | Instagram

From: [redacted] <[redacted]
Sent: 11 December 2025 08:15
To: [redacted] @ Manchester <[redacted] cbre.com>
Cc: [redacted] <[redacted]
Subject: Chamberhall

External

Morning [redacted]

We are finalising our cabinet report for the sale of the site and we are reviewing the valuations for the various element of the site.

I your report, you state that the open market valuation for the whole site is £1.825. However from subsequent discussions this figure does not take in to account site specific issues such as made ground and BNG and therefore does not reflect what the Council may actually achieve from sale in the open market.

In order to carry out our best value and subsidy control assessments we really require a net figure that purchaser would pay, considering site specific issues. I understand from our subsequent discussions that you are unable to produce such a net figure, but perhaps you could confirm?

Regards

[redacted]

Why not visit our website www.bury.gov.uk

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Our ref: VR25-038/KL/JS

27 November 2025

Bury Council
Town Hall
Knowsley Street
Bury
Greater Manchester
BL9 0SW

By Email: [redacted]

Dear Sirs,

Re: Chamberhall Business Park, Harvard Road, Bury, Greater Manchester

Further to your request, we summarise below the position regarding the development scenarios considered within our valuation.

As part of our instructions, we carried out high-level testing of a number of indicative development scenarios to inform the residual valuations in our report dated 18th November 2025. This work was undertaken strictly in line with the scope, assumptions and limitations set out in that report.

The site is valued subject to our stated special assumptions regarding developer's profit, abnormal costs and development constraints. When tested against BCIS build costs, a zero-developer-profit assumption, and current market values, all appraisal scenarios produced a negative residual land value, including the scheme considered to be the most favourable under current market conditions.

Based on the assumptions adopted and the scenarios tested, it appears unlikely that a positive residual land value would be achieved under current market conditions. This is not a viability assessment, and alternative schemes or assumptions outside the scope of our valuation may produce different results.

This letter should be read alongside and is subject to the same caveats and limitations as our valuation report.

Cont../

Haweswater House,
Waterfold Business Park,
Bury, BL9 7BR

Tel: 0161 763 0828
Email: info@nolanrealestate.co.uk
Web: www.nolanrealestate.co.uk

RICS

Nolan Real Estate Limited Registered in England No. 4898906

Cont../

Please let us know if you require any further clarification.

Yours faithfully,

[redacted]
RICS Registered Valuer
[redacted]
For and on behalf of Nolan Real Estate Ltd

Chamberhall Business Park

Economic Impact Assessment

1. Introduction

Bury Council is in advanced discussions in relation to the potential freehold disposal of a site in its ownership at Chamberhall Business Park for the development of a new office facility alongside proposed industrial accommodation. The prospective purchaser, Crown Gas & Power, is proposing to acquire the site for the development of a new management and sales facility.

It is understood that the Council has been passively marketing the site for industrial development over an extended period following the completion of enabling and access works in excess of ten years ago. The proposed scheme would bring a long-term vacant site on the northern edge of the town centre back into active and productive use.

The Council has commissioned this assessment of economic impact to provide a reasonable basis for evaluating the future direct and wider economic impacts arising from the proposed scheme compared to alternative scenarios.

2. Project Description

The site lies within Chamberhall Business Park, an established employment location within the Borough of Bury, immediately to the north of Bury town centre. It is understood that the subject site extends to an area of 3.16 hectares. However, allowing for a large pond and other site constraints, the total developable site area is 2.13 hectares. The site is around 600m to the north of Bury Interchange, providing good strategic access via Metrolink and bus services. Junction 2 of the M66 Motorway is around 3km to the east of the site. Following the allocation of the site for employment uses in 1997, enabling works were undertaken to support the creation of development plots. Following the completion of these works, the site has remained vacant and undeveloped and is now substantially overgrown.

Crown Gas & Power has approached the Council to negotiate the freehold acquisition of the site for the development of an office facility for owner occupation. The proposed facility would comprise of 3,716 sqm (net internal area) with appropriate car parking and employee amenities. It is understood that the office is proposed as a focus for management and sales focused activities. These elements will extend across a 1.49-hectare portion of the site. It is understood that the balance of the site will be developed for a multi-let light industrial development of around 2,320 sqm.

Due to viability constraints associated with commercial development in Bury, capital values are below the level required to support the cost of delivering the scheme.

3. Project context

Delivering the Council's vision

The proposed Chamberhall development will directly support Bury Council's corporate priority to drive economic growth, one of three headline objectives in the Corporate Plan 2024/25. It also contributes to the longer-term Let's Do It! vision of achieving faster-than-average economic growth and reducing deprivation across the borough.

By delivering high-quality employment space in a sustainable and accessible location, the scheme embodies the council's ambition to build a fairer, greener and more competitive economy, as set out in the Bury Economic Strategy (2024–2034).

Creating the Conditions for Business Growth

The scheme will deliver over 7,000m² of flexible employment space for offices and industrial uses. This investment will:

- Attract new businesses and inward investment into Bury.
- Provide modern, adaptable space to support the expansion of local firms.
- Diversify the borough's commercial offer, making it more resilient to future economic change.

These outcomes are consistent with the Economic Strategy's emphasis on developing resilient places and competitive businesses.

Supporting Jobs and Skills

The Chamberhall development will generate benefits at two levels:

- Short-term: construction activity will support local contractors and supply chains, stimulating immediate economic activity.
- Long-term: permanent business and office uses will create new employment opportunities, retain skilled workers locally, and expand the borough's labour market.

This reflects the council's goal of sustainable growth, ensuring that economic development translates into better jobs and skills opportunities for residents.

Strengthening Town Centre Vitality

Although located just outside Bury town centre, the Chamberhall scheme will play a complementary role by:

- Increasing the local workforce population and thereby boosting footfall and spend in shops, cafés, and services.
- Providing headquarters and office accommodation that strengthens Bury's overall offer to investors.
- Reinforcing connectivity with the town centre, given its proximity to Bury Interchange.

This approach aligns with the "Our Place" strand of the Economic Strategy, which highlights the need for vibrant, sustainable, and well-connected town centres.

Planning Policy

The development is fully aligned with relevant planning policy at all levels:

- National (NPPF, 2024): Promotes sustainable economic growth, efficient land use, and high-quality workplaces.
- Regional (PfE, 2024 & GM Industrial Strategy): Focuses on long-term growth, investment in employment sites, and improved connectivity.
- Local (Bury Local Plan & Town Centre Masterplan): Identifies Chamberhall as a strategic employment location, essential to supporting growth and regeneration.

Socio-economic conditions

This section reviews the socio-economic context for Bury within Greater Manchester, demonstrating a clear strategic rationale and economic justification for the delivery of the Proposed Development in terms of social and economic goals.

Population Growth - Bury's population was estimated at 198,000 in 2024[1], an increase of around 7.2% since 2011[2]. This growth is broadly in line with Greater Manchester as a whole and slightly above the England average. Looking ahead, ONS projections indicate continued growth, with the population expected to exceed 200,000 by 2035. This places ongoing pressure on the local labour market and reinforces the need for new employment land to support economic opportunities.

Workforce and Employment Structure - Bury's employment base is diverse[3], with the largest sectors including:

- Health (21.9%).
- Retail (11%).
- Education (9.6%).
- Manufacturing & Logistics (9.6%), higher than national averages, reflecting the Borough's industrial heritage and strategic motorway connectivity.

In comparison, Greater Manchester has a larger share of professional, scientific and technical services, concentrated in Manchester city centre and Salford Quays.

Productivity and Wages - GVA per job in Bury[4] is below the national average, consistent with most of Greater Manchester outside of Manchester city centre. Resident earnings are close to the national median, but workplace earnings[5] are lower, indicating that many residents commute to higher-value employment elsewhere.

Levels of Educational Attainment - Around 55% of Bury residents are qualified to RQF+, above the Greater Manchester and national averages6. The Borough also records a relatively low proportion of residents with no qualifications (6.4%). This reflects a reasonably strong skills profile, though still reliant on mid-level qualifications in trade and technical fields.

Unemployment and NEETs - Labour market challenges remain in Bury:

- The unemployment rate in July 2025was around 4.4%, slightly above the national average but below the Greater Manchester average[7].
- The share of 18–24 year olds who are NEET (Not in Education, Employment or Training) is around 13.6% at the national level[8]. Data is not available at the sub-regional or local levels.

These indicators highlight the importance of creating accessible employment pathways, particularly for young people.

---

1 ONS (2024) - *Mid-Year Population Estimates, UK, 2024.*
2 ONS (2022-based). Subnational Population Projections for Local Authorities in England.
3 ONS (2023). *Business Register and Employment Survey (BRES), 2023.*
4 ONS (2023). *Subregional Productivity: GVA per hour worked and GVA per job, UK, 2023.*
5 ONS (2024). *Annual Survey of Hours and Earnings (ASHE), 2024.*
6 ONS (2024). Annual Population Survey, December 2024.
7 ONS (2023). *Annual Population Survey, 2023*
8 Department for Education (DfE) (2023). *NEET Statistics Quarterly Brief: 18–24 year olds not in education, employment or training (UK).*

Deprivation and Inclusion - According to the *English Indices of Multiple Deprivation (2019[9])*, around 17% of Bury's neighbourhoods fall within the 20% most deprived nationally. While this is lower than the Greater Manchester average, deprivation is concentrated in certain wards, underlining the importance of inclusive growth strategies.

4. Assessment Scope

To inform consideration of the justification for disposal of the site, this assessment outlines the projected additional economic impacts arising from the proposed scheme, benchmarked against alternative options. A summary of the alternative options is outlined as follows:

- **Scenario 1: Business as Usual** – under this scenario, the Council would not take any further action to facilitate the disposal and development of this site. The site would continue to be passively marketed, awaiting potential demand from a developer for an appropriate use. As the site has remained undeveloped over a period of more than 10 years and is subject to clear constraints, it is reasonable to assume that it would remain vacant for the foreseeable future under this option.
- **Scenario 2: Industrial Development** – the Council would opt to actively market the site for industrial development under this option. Based on an effective and resourced marketing strategy, the Council has advised that the site may be sold and developed within 2-3 years, supporting the delivery of 8,529 sqm of multi-let industrial space. Units would be in the order of 1,485 sqm to 2,320 sqm, which reflects market demand within the North Manchester area.
- **Scenario 3: Proposed development** – the disposal of the site to Crown Gas & Power for development as described in Section 2 of this paper. This proposal is being considered due to the potentially significant economic benefits associated with the construction and future operation of these sites. In particular, it reflects the expected rationale for supporting office-based uses in close proximity to amenities and infrastructure within the adjacent town centre.

The assessment of economic impact incorporates an assessment of the additionality of the projected activity under each option. Additionality refers to the extent to which activity takes place at all, on a larger scale, earlier or within a specific designated area or target group as a result of the interventions. The additional effect of a project is the difference between what would happen anyway, termed the reference case (the 'business as usual' option), and the forecast result if the project were implemented. Additionality has been assessed at the Bury Borough level and has considered the following adjustments:

- **Leakage** - proportion of outputs that benefit those outside of the project's target or reference area or group.
- **Displacement** - proportion of project outputs accounted for by reduced outputs elsewhere in the target area. Displacement may occur in both the factor and product markets.
- **Multiplier effects** - further economic activity associated with additional local income and local supplier purchases.
- **Deadweight** - outputs which would have occurred without the project – this is assessed through the reference case, i.e. the business as usual scenario.

The approach to the assessment is in general conformity with the principles for place-based analysis outlined within the HM Treasury Green Book (2022).

9 *MHCLG Indices of Multiple Deprivation (2019).*

5. Economic Assessment

Construction Phase

The assessment of economic impacts in the construction phase focuses on the following indicators:

- **Temporary Construction Employment -** Cost estimates for the development under each scenario have been used as the basis for calculating the number of temporary construction jobs expected to be generated through the Chamberhall development scenarios. Construction cost estimates have been provided by the client. The number of person-years of construction employment has been estimated based on the construction sector average annual turnover per employee for Great Britain[10,11].
- **Gross Value Added** - GVA has been estimated based on turnover to GVA ratios for the construction sector at the national level, derived from the ONS Annual Business Survey (2022).

The following additionality assumptions have been applied to inform the assessment of net additional impact in the construction phase:

- **Leakage** – A 'high' leakage-ready reckoner of 50% has been applied[12], reflecting the contract-based nature of construction employment and the potential for labour to come from large population centres across the Greater Manchester area.
- **Displacement** - A low level of displacement (10%) has been assumed at the Bury level as the scheme is unlikely to directly displace existing or other pipeline capital projects. A limited level of displacement is provided for, guided by Census data, which shows approximately 90% of construction workers in Bury reside in Bury.
- **Multipliers** - A multiplier of 1.25 has been applied, taken from the What Works Centre for Local Economic Development Multiplier Toolkit.
- **Deadweight** - under the "do nothing" scenario, no development is expected to take place. On this basis, nil deadweight has been applied.

Table 1 sets out the results of the analysis under each scenario. The construction phase has the potential to support 52.5 gross FTE jobs under Scenario 3 over an assumed 2-year construction period, compared to 40.5 FTE under Option 2. The net additional employment impact under these scenarios is projected to be 30 FTE jobs and 23 FTE jobs, respectively.

Table 1: Construction Phase employment

	Scenario 1: Business as Usual	Scenario 2: Industrial Development	Scenario 3: Proposed Development
Gross employment (person years)	-	81	105
Gross FTE Employment	-	40.5	52.5
Net Direct FTE Employment	--	18	24
Net additional FTE Employment	-	23	30

The estimated construction capital expenditure associated with the Proposed Development could deliver a net additional GVA contribution of £3.2 million under Scenario 3. By comparison,

[10] ONS Construction Statistics for Great Britain, 2022.
[11] Inflated to 2025/26 prices using GDP Deflators, June 2025.
[12] BEIS Occasional Paper 9 (research to improve the assessment of additionality)

construction activity under Scenario 2 is projected to support a net additional GVA impact at the Bury level of £2.5 million. This is summarised in Table 2.

Table 2: Construction Phase - GVA (£m)

	Scenario 1: Business as Usual	Scenario 2: Industrial Development	Scenario 3: Proposed Development
Net local Direct GVA Impact	-	£1.9m	£2.4m
Indirect/induced GVA Impact	-	£0.59m	£0.77m
Net additional GVA Impact	**-**	**£2.5m**	**£3.2m**

Operational Phase

The number of direct operational jobs has been estimated using employment density benchmarks, sourced from the former HCA's employment densities guide (3rd edition), to calculate the jobs generated through the occupation of new commercial floorspace expected to be delivered through the development. Gross employment is estimated on a full-time equivalent (FTE) job basis, and the applied ratios are as follows:

- **Offices** – a density of 12 sqm (NIA) per FTE has been applied. This is a relatively low density of office-type activities, reflecting of head office and management functions. However, it is understood that the facility will also be a focus for sales-related activities, which typically involve higher densities (8 sqm per employee). The lower density is therefore considered to be reasonably prudent and accounts for alternative working arrangements (home working and flexible working arrangements).
- **Industrial** – a density of 45 sqm per employee (GIA) has been applied. With no end user identified, a blended ratio for industrial (36 sqm per FTE), light industrial (47 sqm per FTE) and final mile logistics (70 sqm per FTE) has been applied.

The number of actual jobs created will be higher once part-time workers are taken into account – for example, one FTE job may support, say, two part-time workers. To estimate the actual jobs, ratios of workforce jobs to FTE jobs have been applied, derived from Experian local market data for Bury.

The estimate of net additional employment effects takes the following adjustments into account:

- **Leakage** - a leakage figure of 45% has been applied at the Bury level based on Census 2011 commuting patterns for Bury (Census 2011 Table WU01UK).
- **Displacement** – a low to medium displacement rate has been assumed for both office and industrial uses. For office-based activities, the occupier has advised that there will be significant opportunities to create sales-related jobs benefiting from role-specific training that may be appropriate for younger people (aged 18-25) who are not currently in education, employment or training. There were 5,350 claimants of out-of-work benefits in Bury in July 2025, including 1,060 in the 18-24 age group. For industrial accommodation, market analysis indicates that there is constrained supply of modern stock around the town centre, with demand for new premises likely to be strong. The MHCLG Appraisal Guide states that a medium (25%) displacement rate is appropriate when interventions target broadly available sectors or skills, meaning local people benefit.
- **Multiplier** - A multiplier of 1.15 has been applied, taken from the What Works Centre for Local Economic Development Multiplier Toolkit. This accounts for both supply chain and employee purchases at the local authority level.

- **Deadweight** - under the "do nothing" scenario, there is no development, so construction jobs under the other options are considered additional.

As highlighted in Table 3, the Chamberhall development has the potential to support 90 net additional FTE jobs in Scenario 2 (industrial development) and 171 in Scenario 3.

Table 3: Operational Phase employment (FTE)

	Scenario 1: Business as Usual	Scenario 2: Industrial Development	Scenario 3: Proposed Development
Gross FTE Employment	-	190	361
Net Direct FTE Employment	-	78	149
Net Indirect/Induced FTE Employment	--	12	23
Net Additional FTE Employment	-	90	171

The average annual GVA per FTE employee for the appropriate activities has been sourced from Experian[13] and applied to the net additional operational phase jobs estimated to be generated by the Proposed Development. Indirect and induced GVA have been calculated based on the average GVA per FTE worker figures for Bury, in relevant sectors.

Table 4: Operational Phase - GVA (£m)

	Scenario 1: Business as Usual	Scenario 2: Industrial Development	Scenario 3: Proposed Development
Gross GVA effect	-	£14.2	£17.5
Net local Direct GVA Impact	-	£5.9	£7.2
Indirect/induced GVA Impact	-	£0.53	£0.79
Net additional GVA Impact	-	£6.4	£8.0

Allowing for the persistence of employment benefits over ten years, the total cumulative net additional discounted GVA impact would amount to £38.6 million under Scenario 3 compared to £30.7 million under Scenario 2. This allows for discounting at 3.5% (the social time preference rate) and decay of benefits over the period.

Fiscal benefits

In addition to the above, there will be further benefits associated with the delivery of employment floorspace. Based on benchmark rateable values, it is estimated that the development could generate a total business rates income of around £310,000 per annum under the proposed scheme (Scenario 3) compared to around £110,000 per annum under the industrial development scenario (Scenario 2).

Wider benefits

Given the nature of the proposed developments, it is envisaged that investment will give rise to a range of wider impacts that are of significant economic importance. These include:

- **Town centre linkages and employee expenditure** - Strengthens connectivity within the town centre, increasing footfall and boosting employee and visitor spending in local businesses. This is supported by research from the Centre for Cities and British Council for Offices, which states

[13] Experian Regional Economic Forecasts, June 2024.

employees typically spend between £1,300 to £1,800 per annum in their town centre. Taking a mid-point of £1,550, employment supported under the proposed scenario (Scenario 3) could support gross expenditure of £560,000 within the town centre each year.

- **Supporting skills and training** - Provides opportunities for residents to develop new skills and access training, helping to raise employability and support inclusive growth. In particular, the proposed scheme (Scenario 3) proposes role-related training targeted at people accessing the labour market.
- **Image** - Enhances the profile and attractiveness of the town through high-quality regeneration, improving perceptions and encouraging further investment.
- **Bringing brownfield land back into economic use** - Development will unlock an underutilised site, repurposing brownfield land for productive use that supports sustainable development and long-term economic activity.

6. Conclusions

The Chamberhall site has remained vacant for more than a decade despite earlier enabling works and passive marketing. This assessment demonstrates that both industrial and mixed office/industrial development options would generate meaningful economic and fiscal benefits, though with different risk profiles and long-term impacts.

- An industrial-only scheme (Scenario 2) is low-risk, market-backed, and financially viable. It would deliver 90 net additional jobs, £6.4m net GVA annually, and £30.7m cumulative GVA over 10 years. However, it offers modest fiscal returns and mainly mid-value employment.
- The proposed mixed office and industrial scheme (Scenario 3), anchored by Crown Gas & Power, requires disposal at below market value but secures higher-value employment, stronger town centre linkages, greater fiscal benefits, and a cumulative £38.6m GVA over 10 years

Overall, Scenario 3 provides greater strategic and long-term value by supporting skills, inclusive growth, and regeneration.

Agenda Item 8

Classification:	Decision Type:
Open	Key

Report to:	Cabinet	**Date:** 15 January 2026
Subject:	Council Tax Support Scheme 2026	
Report of	Deputy Leader and Cabinet Member for Finance and Transformation	

Summary

1. Bury Council has reviewed its Working Age Council Tax Support (CTS) scheme to ensure it remains fair, efficient, and sustainable. The current means-tested model delivers strong targeting but is administratively complex and less generous for some working families. Three alternative models were modelled to explore simplification and fairness.

2. The scheme for Pension Age residents is prescribed by central government and cannot be amended by local authorities.

3. For the financial year 2025/26 the authority levied £156,267,570 gross in Council Tax. £13,382,097 (9% of gross levy) is projected to be discounted over the year in order to provide support to residents. Of this figure £7,590,145 (5% of gross levy) is projected to be discounted for support towards working age households.

4. Council Tax is a critical funding stream for the authority in determining budgets for the delivery of council services to residents and growing in its proportion of the council's overall funding.

5. Bury, like most other councils, is under significant financial pressure and when designing the Council Tax Support scheme must take into close consideration the financial impact this may have. For example, a more generous scheme may require additional offsetting of savings whilst a far less generous scheme has the potential to create greater losses to collection than the scheme offsets with support. Therefore, the principle of the proposal is to remain as cost neutral as possible whilst providing more support to those who need it most.

6. It is critical to note that no option for change in a Council Tax Support Scheme can be made or considered without adherence to The Local Government Finance Act 2012 which sets out that billing authorities must consult with the public on any draft scheme for Council Tax Support.

7. Following approval from Cabinet on the proposal, the authority commenced public consultation on 6th November for a period of five weeks until 11th December.

8. The results and analysis of the public consultation are contained within Council Tax Support Scheme Consultation Analysis report.

Recommendation(s)

9. That Cabinet approve presentation of the new Council Tax Support scheme at Full Council on 21st January in order to seek Full Council approval for adoption and implementation in April 2026.

10. That Full Council approve the adoption and implementation of the new Council Tax Support Scheme from 1st April 2026

Reasons for recommendation(s)

11. The proposed scheme has already been approved for consultation and must now be approved by Full Council before adoption.

Alternative options considered and rejected

12. Retention of the existing scheme.

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Links with the Corporate Priorities:

13. Reduce Child Deprivation – the remodelled scheme aims to provide increased financial support to families on low incomes.

14. Inclusive Economic Growth – through providing greater financial support to families, the scheme enables and supports employment chances for those residents balancing employment with childcare costs.

Equality Impact and Considerations:

15. The analysis assessed households by disability and family composition. Current protections for disabled adults, carers, and lone parents perform well. However, lower-band caps and tight capital limits restrict support for other low-income groups.

16. The proposed scheme maintains protections and increases awards for families with children, aligning with the Council's Public Sector Equality Duty to advance equality and reduce child poverty.

Environmental Impact and Considerations:

17. Not applicable

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
Please see background paper for a full list of risks and mitigations.	

Legal Implications:

18. Following the case of *LL & Anor, R (on the application of) v Trafford Metropolitan Borough Council* [2025] EWHC 2380 (Admin) CTS schemes must be formally adopted by Full Council under s.67(2)(aa) Local Government Finance Act 1992. Adoption by Cabinet or delegation would be unlawful.

19. Schemes must also:
    - Avoid double-counting income already deducted in Universal Credit.
    - Clearly specify disregards for UC elements (carer, disabled-child, etc.).
    - Evidence compliance with the Equality Act 2010 through an Equality Impact Assessment (EIA).

20. Section 13A of the Local Government Finance Act 1992 ("the 1992 Act"), as amended by The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2022, requires each billing authority in England to make a scheme specifying the reductions which are to apply to amounts of council tax payable by persons, or classes of person, whom the billing authority considers are in financial need.

Financial Implications:

21. The current CTS scheme costs £7.57m annually.

22. The proposed scheme is projected to cost £7.63m annually based on current caseload and therefore there is no material impact forecast on the 2026/27 budget.

Appendices: Please note:

Appendix 1 - Bury Council Tax Support Scheme Analysis

Appendix 2 - Bury Council Tax Support Scheme Consultation Analysis

Appendix 3 - EQIA document

Background papers:

Please include a glossary of terms, abbreviations and acronyms used in this report.

Term	Meaning
CTS	Council Tax Support
UC	Universal Credit
DWP	Department for Work and Pensions
Non-Dependant	An adult living in a property who is not the liable person for Council Tax

Bury Council Tax Support Scheme 2026 Options Analysis

Summary: Council Tax Support scheme review

Bury Council is reviewing how it supports low-income households with their Council Tax. The current Council Tax Support (CTS) scheme for the financial year 2025/26, remains accurate and well-targeted but officers wish to explore what administrative burdens could be reduced for the council whilst maintaining as supportive a scheme as possible within the constraints of budgets, caseload, and demographics.

One of the major ways in which councils can simplify their CTS schemes is to move from a fully means-tested scheme, where even small changes can trigger a reassessment and revised Council Tax bill, to a banded scheme where minor income and entitlement changes do not need to be processed. Banded schemes are less administration-heavy, and when bands are designed well:

- Reduces the administrative burden regarding changes to entitlement
- Are easier for residents to understand
- Provides more certainty over what they need to pay throughout the year
- Assists with the collection of Council Tax
- Reduces the administrative burden created by resident contact.

A key feature of Bury's CTS scheme is its Council Tax Band B cap**,** which limits support to Council Tax Band B properties. This means residents in higher-band dwellings receive no additional help beyond that level, unless they fall within a protected group. As an example, a resident living in a Band D property would only receive support up to the level of a Band B property. While around a third of schemes nationally apply a band cap, most commonly at Band D, Bury's lower cap reflects its local tax base, where most properties fall within Bands A and B. Protections remain in place for disabled residents, carers, and lone parents to prevent hardship in higher-band homes.

Three income-banded designs were tested against the current scheme, with some significant changes presented by some, notably Option 1, which we recommend is discounted from consideration.

The three options offer a different balance of priorities:

- **Option 1** is designed as an extremely 'simple' scheme. It reduces capital limits to £6,000 and does so while considering both earned and unearned

income in its calculations. Option 1 models a flat rate non-dependant deduction of £65. Crucially, Option 1 considers the impact of raising the Council Tax Band cap from a Band B to a Band C. Option 1 also considers the impact of a 37% minimum contribution to Council Tax liabilities.

- **Option 2** reverts to Bury's current capital threshold of £8,000, considers all income in eligibility calculations, and models a lower non-dependent flat rate of £40. Option 2 also models a maximum 100% support scheme for those with no earned income.
- **Option 3** presents an earnings only scheme with 20% minimum contribution from all claimants alongside flat rate non-dependant deductions.

Across all options, the direction of change is towards simplification and improved predictability. However, each comes with trade-offs between fairness, administrative efficiency, and cost.

The analysis indicates that while there are options in terms of scheme design, Bury's current scheme appears to be delivering well for its residents. There are administrative savings to be made in abandoning the use of tariff income as the notional income margin is negligible.

All but one option present potential savings. The option presenting the most savings would push considerable burden onto low-income households in Bury and are likely to be counterintuitive in terms of collection rates, recovery costs, relationships with residents, and potential harm, particularly for households with children.

Option 3 presents the most reasonable prospects for CTS scheme revision as most residents retain their CTS award. However, even this scheme come with costs to some residents, which we explore further in this report.

Additionally, as Option 3 is a more 'generous' scheme, in that the majority of claimants will receive more CTS, this increased generosity presents risk for the council in terms of increased future spending. More generous scheme by their nature bring more people into entitlement and may attract more applicants as a result. It is not possible to model the extent of this potential future expenditure as data on the income and earnings of all Bury's residents is not available.

To support Bury Council's obligations under equality legislation and the Public Sector Equality Duty, this analysis considers the impact by household group paying particular attention to households with children and disabled households, in line with Bury Council's wider commitments towards reducing child poverty and protecting vulnerable groups.

Background and rationale for review

Bury Council has operated its current Council Tax CTS scheme since 2017, following earlier versions introduced after Council Tax Benefit was abolished in 2013. Since then, the scheme has remained broadly unchanged apart from routine annual updates.

In recent years, the increasing financial pressures facing many households and subsequent challenges to collecting vital council income, has seen many CTS schemes migrating towards higher rates of generosity while aiming to achieve lower levels of complexity.

Bury Council's CTS review ensures CTS policymaking continues to be well-informed and the scheme fit for purpose.

Purpose and priorities of the review

The purpose of the review is to design a scheme that remains fair, efficient, and financially sustainable while being easier to administer and understand. The review uses current caseload data to understand the direct impacts of any changes on current Bury residents claiming CTS.

Current CTS Scheme Overview

Bury currently operates a fully means-tested Council Tax Support (CTS) scheme for working-age residents. The scheme is based on individual household assessments that considers income, savings, household composition, and specific premiums for vulnerable groups.

Council Tax Support for pension age residents follows prescribed rules and is not subject to local scheme design.

Key Scheme Parameters

Feature	Description
Scheme Type	Means-tested (not income-banded). Entitlement is calculated in line with traditional benefit rules rather than simplified income bands.
Protected Groups / Premiums	Includes specific premiums for **lone parents**, **disabled adults**, **disabled children**, **carers**, and those in receipt of certain **Armed Forces**-related benefits, providing higher allowances for these households.
Maximum Council Tax Band Eligible	Support is capped at **Band B**, meaning households in higher-value properties receive CTS only up to that band.
Capital Limits	The **upper capital limit** is **£8,000**, above which no CTR is awarded. A **lower capital (tariff) limit** of **£6,000** applies, meaning savings between £6,000 and £8,000 are treated as generating notional income, reducing entitlement.
Maximum Support	The **maximum reduction** for working-age claimants is **80%** of their Council Tax liability, ensuring that all claimants pay at least 20% of their bill.
Taper Rate	A **20% taper** is applied — for every £1 of income above applicable allowances, CTS entitlement reduces by 20 pence.
Universal Credit Alignment	The scheme **uses Universal Credit (UC) income** in its assessment and applies disregards for several UC elements: Housing, Limited Capability for Work, Carer, Disabled Child, and

	Childcare elements. This helps maintain fairness for working families and disabled residents.
Non-dependent Deductions	The scheme applies a **variable non-dependent deduction model** based on the non-dependent's gross income, with **four income ranges**. Deductions increase with income: – **£0** for incomes up to **£1,022.66/month** – **£21.67** for **£1,022.66–£2,006.32** – **£44.20** for **£2,006.32–£2,500.31** – **£55.47** for **£2,500.31+**
Flat-rate Non-dependent Deductions	Not used — deductions are income-based, not fixed.
Earnings-only Assessment	Not applied — all relevant income types are included in the means test.

Summary Insight

Bury's current CTS scheme follows a traditional means-tested model designed to target support precisely but with significant administrative complexity. It retains protections for vulnerable groups and alignment with key Universal Credit elements, but the 20% minimum payment and tight capital limit (£8,000) can limit support for low-income households with modest savings.

The income-based non-dependent deduction structure adds further means-testing detail, and whilst providing fairness relative to household income levels, has historically proven difficult to understand for many residents.

Overall, the current scheme offers robust targeting and policy continuity, though it is more complex to administer, more difficult for residents to understand and less flexible than simplified income-banded alternatives.

Comparison of Bury's Current CTR Scheme with Typical Greater Manchester Practice

Feature	Bury (Current Scheme)	Typical Greater Manchester Schemes	Comment / Assessment
Scheme Type	Means-tested	Predominantly income-banded (or hybrid)	Bury retains the older, more complex means-tested model used before income-banding became common.
Protected Groups / Premiums	Lone parent, disability, disabled child, and carer premiums	Most income-banded schemes have removed individual premiums but offer protection via simplified "vulnerable" bands or higher discounts.	Bury's detailed premiums give precision but add complexity.
Maximum Council Tax Band Eligible	Band B	Band D or unrestricted	Bury's Band B cap is stricter than most GM authorities, limiting support for households in higher-value homes.
Maximum Support for Working-age Claimants	80%	85–100% (varies)	Bury's 20% minimum payment is less generous than the GM average, where several councils offer 90–100% support.
Capital Limits	£6,000 lower, £8,000 upper	£6,000 lower, £16,000 upper	Bury's upper limit is more restrictive, excluding low-income households with modest savings.
Taper Rate	20%	Typically 15–25%	Comparable with peers.

Earnings-only Assessment	No	Often “Yes” in income-banded schemes	Bury’s model includes all income types, increasing administrative effort.
Universal Credit Alignment	Yes – UC income used, with element disregards (Housing, Carer, Disabled Child, Childcare, Capability)	Yes – UC alignment standard	Consistent with regional practice.
Non-dependent Deductions	Variable (4-band income-based)	Mostly flat-rate or simplified	Bury’s model is more detailed, increasing accuracy but adding complexity.
Flat-rate Non-dependent Discount	Not used	Common in income-banded models	Bury’s case-by-case approach is more administratively demanding.
Review and Uprating Frequency	Annual	Annual	In line with peers.

Performance of Bury's Current Council Tax Support Scheme

Bury Council's current CTS scheme is a means-tested model that provides support to 7,485 working age residents. The scheme delivers a weighted average discount of 73.8 per cent, equating to an average of roughly three-quarters of Council Tax liability being met through CTR awards.

While this confirms broad coverage and strong targeting for the lowest-income households, the underlying data shows the scheme's complexity and uneven outcomes across different household types and income groups. The scheme generates a high administrative burden and creates sharper financial pressure on certain working families, particularly those with children.

Distribution of Support

By level of discount

- There are 722 distinct discount levels in the current caseload, reflecting the fine-grained calculations of the means-tested design.
- Around 82.7 per cent of all claimants (6,192 residents) receive support at or around the 80 per cent maximum award for working-age households.

This profile illustrates a scheme heavily concentrated at the maximum level of working-age support, but still requiring full income verification and recalculation for all claimants when Universal Credit or earnings change.

Household Composition

Household type	Average CTS (£/month)	Average Council Tax paid (£/month)
Single	£83.34	£26.49
Single with children	£82.97	£32.16
Couple (no children)	£105.35	£38.72
Couple with children	£96.89	£49.41

The data shows that families with children contribute the most towards Council Tax, even though their CTS awards are broadly comparable to single households. Couples with children pay on average £49 per month after reductions, almost double the payment for single households.

This points to limited generosity for working families, driven by the 20 per cent minimum payment rule, the withdrawal of CTS as income rises, the Band B cap, and the interaction between CTS and Universal Credit tapers.

Disability and Protected Groups

Household disability status	Average CTS (£/month)	Average Council Tax paid (£/month)
Not disabled	£83.23	£33.32
Adults with disability	£91.10	£27.87
Children with disability	£107.02	£26.74

The scheme performs well in protecting households affected by disability, with average CTS awards approximately 10–25 per cent higher than for non-disabled households. This reflects the presence of disability, carer, and disabled child premiums, as well as the alignment with Universal Credit disregards.

On average, disabled households pay £6–£7 less Council Tax per month than non-disabled households, indicating that the protective elements of the current design are functioning as intended.

Income Responsiveness

The “average CTS by earned income group” dataset confirms that support falls sharply as income increases. Claimants with no earned income receive an average of £89 per month, compared with only £29 per month among those earning £750–£1,000 per month.

This sharp taper confirms that the 20 per cent withdrawal rate, combined with Universal Credit reductions, results in very high effective marginal deduction rates. While precise work-incentive modelling is outside the scope of this dataset, the pattern mirrors known issues with means-tested CTS schemes nationally, where in-work households gain little net benefit from modest earnings increases.

Administrative Implications

The scheme's structure creates significant administrative overhead:

- **Granular award levels:** The existence of 722 unique discount percentages necessitates continual recalculation whenever a claimant's income, UC award, or household composition changes. Bury received c100,000 DWP Update tasks in 2024/25.
- **Frequent reassessments:** Because the scheme relies on detailed means tests, almost all UC-linked claimants experience monthly or quarterly recalculations, generating additional correspondence and staff workload.
- **Complex disregard structure:** The presence of multiple premiums (lone parent, disability, carer, child) and income-based non-dependent deductions requires manual checks or system rules that are difficult to automate.
- **Customer understanding:** Residents often find award notices difficult to interpret, which increases inbound queries and delays in payment adjustment. The council received over 13,000 calls relating to Council Tax Support and Benefits in 2024/25 and receive around 17,000 CTS related incoming pieces of written contact or work from residents over the year. Operationally, this positions Bury's current scheme as accurate but administratively heavy; a design optimised for precision but at the expense of clarity and efficiency.

Strengths

- **Strong targeting**: The scheme directs the highest support to those with lowest incomes and to households with disabilities.
- **Policy alignment:** Integration with Universal Credit and the use of DWP disregards ensure consistency across welfare systems.
- **Continuity:** The means-tested model is well-understood internally and produces consistent outcomes year-on-year.

Weaknesses

- **Administrative inefficiency:** Managing 722 discount levels and multiple deduction rules require substantial staff time and system resources.
- **Limited simplicity for residents:** Award notices are complex, and frequent UC changes lead to confusion and recalculation cycles.
- **Weaker support for families**: Couples with children pay nearly twice as much Council Tax per month as single adults despite similar incomes, which may contribute to differential arrears outcomes.
- **Restrictive parameters:**
    - The Band B cap limits support for larger or mid-value homes.
    - The £8,000 capital ceiling excludes households with modest savings.
    - The 20 per cent minimum payment affects over four-fifths of claimants and increases arrears risk among low-income working-age households.

Summary

Bury's existing CTS scheme provides comprehensive but highly detailed support, with clear protection for disabled residents and good alignment with national welfare rules. However, the data confirms that it is administratively burdensome, less generous for working families, and poorly adapted to Universal Credit's volatility.

In practice, the scheme prioritises accuracy and control over simplicity and stability. While effective at ensuring fairness between disabled and non-disabled claimants, it imposes disproportionate administrative effort for the level of financial precision achieved.

The evidence suggests that a move toward an income-banded model could substantially reduce administrative load and resident confusion, without undermining the equity outcomes currently delivered.

Current caseload summary

The working-age CTS caseload represents the group most affected by any future reform.

Headline Insight

Bury's CTS scheme supports 7,485 households, providing £7.6 million in annual reductions — covering almost three-quarters of eligible Council Tax.

Around two-thirds of claimants are working-age and one-third pension-age. About 1,900 households receive full support, while the remainder pay a partial contribution based on income and household composition.

Non-dependent deductions total £173,300, applied across approximately 7% of cases, reducing overall scheme cost by just over 2%.

Total CTS households	12,000
Working-age households	≈7,550
Pension-age households	≈4,450
Total Council Tax (CTS households)	£12.8 million
Council Tax eligible for CTS	£10.4 million
Council Tax net of CTS	£2.8 million
Average CTS discount	73.8%
Households receiving maximum discount	1,905
Council Tax Support (gross)	£7.8 million
Non-dependent deductions	£173,300 (≈550 households)
Council Tax Support (net)	£7.6 million

Future direction

Through this review, officers aim to ensure that the CTS scheme remains fit for purpose in a changing welfare and economic environment.

The Council's objective is to design a scheme that:

- reduces administrative effort where possible,
- strengthens work incentives, and
- ensures the sustainable use of public resources.

In doing so, Bury Council seeks to retain the strengths of its existing approach while addressing the operational and fairness challenges that have emerged since 2017.

Who may be falling through the gaps?

While the scheme performs well in its support of disabled people, lone parents, and carers, the relatively low Council Tax Band cap could be limiting support and potentially driving higher Council Tax arrears for those in higher bands. The exemptions to the band cap are clearly working as 9% of the caseload represent Council Tax Bands C and above.

However, the exemptions cover disability, lone parents with children under 5, carers and those in receipt of certain Armed forces-related benefits only and exclude those living on very low incomes.

Description of Options

This modelling presents three variations of Bury's current income-banded Council Tax Support (CTS) scheme for working-age residents. Each option adjusts key parameters, such as capital limits, income treatment, and non-dependant deductions, to test how different configurations might improve fairness, administrative efficiency, and sustainability.

While all three options retain Bury's income-banded structure, they explore alternative ways of balancing support for low-income households, work incentives, and overall scheme cost. Some models expand eligibility through higher capital limits or the removal of minimum contributions, while others tighten thresholds or introduce higher flat-rate deductions to improve cost control.

Each option has been modelled and compared against the current scheme to assess distributional impact, fiscal variation, and administrative implications.

The detailed parameters for each option are set out in Appendix A: Option Parameters.

Scheme costs

Scheme	**Approximate Annual Cost (Total CTR)**
Option 1 – Reduced capital threshold, Band C cap, flat rate non-dependant deductions of £65, lower income thresholds	£0.772m
Option 2 – Retained capital threshold, flat rate non-dependant deduction of £40, and up to 100% maximum awards	£4.199m
Option 3 – Earning only, retained capital threshold, flat rate non-dependant deductions of £40, higher income thresholds	£7.634m
Maintain current scheme	£7.568m

(Figures rounded to the nearest £25 for presentation; based on the cost modelling dataset for September 2025.)

The options producing savings for Bury Council, Options 1 and 2, do so primarily through lowering the income thresholds, meaning only applicants with **extremely** low incomes for their circumstances would qualify.

Option 1, and 2 are also ‘all income’ schemes, meaning both earned and unearned income is considered in assessments. When lowering income thresholds at the same time as taking all income into account, the result is fewer applicants qualify for support.

Option 1 is a clear outlier as it combines relatively high flat rate non-dependant deductions at £65 per week, whilst simultaneously taking all income into account within very low-income thresholds.

While there are scheme options here that have potential to deliver savings to the council, decisions on which scheme to adopt must consider the increased cost of collection and recovery, and the impact on residents of large Council Tax increases.

Option 1

Distributional impact (compared with current scheme)

Group	Better Off / No Change	Worse Off	Losing > £25/month	Commentary
All	14 (0.18%)	7,471 (99.8%)	6,324 (84.4%)	Almost all claimants would be impacted negatively by this scheme. The vast majority would also lose more than £25 per month. 53% of claimants would lose more than £75 per month. As such, no further breakdown for this option is needed as almost all claimants are worse off.

What the data shows (Option 1 vs. current scheme)

Strengths	- An enormous saving to the council of £6.8m per year
Weaknesses	- The CTS scheme would be reduced to supporting only 1,092 households - Full Council Tax liability would be uncollectable from the vast majority of claimants losing their CTS
Who is at risk?	- All residents losing eligibility to CTS
Who is better protected?	- 1,092 households would retain their CTS award, but the average would plummet to 13%
Is Option 1 better or worse than the current scheme?	- Worse.
Administrative and behavioural impacts	- The council is almost certainly not going to collect or recover Council Tax liabilities as a result of this scheme proposal.

Mitigations and implementation safeguards	- None that would mitigate the scale of impact of this scheme.

Option 1 represents a highly simplified model based on an local authority's current scheme. While it demonstrates the potential financial savings achievable through a more restrictive approach, the modelling indicates significant trade-offs in terms of equity, collection performance, and resident impact. The estimated £6.8 million annual saving would largely be transferred to low-income households as additional Council Tax liability, increasing financial pressure on those least able to pay.

Given these findings, Option 1 illustrates the risks of excessive simplification within CTS design and highlights the need for a balanced approach that protects vulnerable residents while maintaining affordability for the Council. The significant risks of pushing low income and financially vulnerable households into debt and poverty which contradicts the council's intent and ambition regarding the Let's 2030 strategy mean it is therefore not recommended for adoption at this stage but serves as a useful benchmark to understand the implications of a more restrictive scheme.

Option 2

Distributional Impact (Compared with Current Scheme)

Group	Better Off / No Change	Worse Off	Losing > £25/month	Commentary
All	1,018 (13.6%)	6,467 (86.4%)	3,374 (45%)	
Lone parents (2,115)	13 (0.6%)	2,102 (99.4%)	1,943 (91.8%)	Lone parents are impacted significantly.

Option 2 delivers Bury's current capital threshold of £8,000, considers all income in eligibility calculations, and models a lower non-dependent flat rate of £40. Option 2 also models a maximum 100% support scheme for those with no earned income.

However, Option 2 also reduces income thresholds in the income bands to a maximum of £700 per month across all household types, meaning those with income over £700 per month are excluded.

What the data shows (Option 2 vs. current scheme)

Strengths	- A £3.4m saving to the council
Weaknesses	- The average CTR award would be reduced to 46% - The CTR caseload would reduce to 4,464 meaning 3,016 households would lose eligibility - Families with children would see the greatest losses by losing their eligibility to CTR entirely as a result of the lower income thresholds
Who is at risk?	- All residents losing eligibility to CTR - Families with children in particular
Who is better protected?	- 1,092 households would retain their CTR award, but the average would plummet to 13%

Is Option 1 better or worse than the current scheme?	- Worse.
Administrative and behavioural impacts	- The council is almost certainly not going to collect or recover Council Tax liabilities as a result of this scheme proposal.
Mitigations and implementation safeguards	- None that would mitigate the scale of impact of this scheme.

This option also presents significant trade-offs between affordability to the council and affordability for residents. Option 2 is less of a blunt instrument than Option 1 and would offer savings to the council of £3.4 million a year based on the current caseload modelling.

However, as with Option 1, reducing scheme generosity to any extent must be considered alongside the significant risks of pushing low income and financially vulnerable households into debt and poverty which contradicts the council's intent and ambition regarding the Let's 2030 strategy, the impact of potential lower collection rates, increased recovery activity, and damage to relationships with arguably the most vulnerable resident groups.

Option 3

Distributional impact (compared with current scheme)

Group	Better Off / No Change	Worse Off	Losing > £25/month	Commentary
All	6,605 (88%)	880 (12%)	500 (6.7%)	
Lone parents (2115)	1,868 (88%)	247 (12%)	85 (4%)	

Option 3 presents a 20% minimum contribution from all claimants, assesses only earned income and considers higher income thresholds. In addition, Option 3 models a flat non-dependent deduction of £40.

Option 3 is a more generous CTS scheme for Bury's residents. 88% of current claimants would be better off, the average CTS award would increase from 74% to 79%, and this scheme would mean only 16 claimants would lose eligibility based on their current financial circumstances.

More progressive schemes come with future financial risk that must be considered. Implementing a more generous scheme may attract more applicants and would bring more people into eligibility. It is not possible to model future expenditure as data on the earnings of all Bury residents is not available and this modelling has been conducted based on the current CTS caseload.

In terms of cost increases we can model, the scheme would cost the council £65.3k more to deliver than its current scheme. This increase does not take potential future overall Council Tax increases into account, as it is based on current liabilities.

Whilst future expenditure is stated as a potential risk in this report, this increase in eligibility and generosity could well be perceived as welcomed. More generous CTS schemes provide greater financial support for residents on low incomes and the benefits of doing so can be significant when addressing local poverty in anti-poverty strategies and child poverty strategies.

Option 3 is more generous because it limits the assessment of income to earnings only, excluding unearned income such as benefits. This means that working families who receive Universal Credit or other forms of income support are not penalised twice for the same income stream. By disregarding these elements, more of a

household's earnings fall within the income thresholds for support, increasing their Council Tax Reduction entitlement.

In practice, this design change expands eligibility and raises average award levels. The modelling shows that under Option 3, 88% of current claimants are better off or see no change, and the average award increases from 74% to 79%. Only 16 households lose entitlement entirely.

For Bury specifically, this approach benefits families because the borough's demographic profile includes:

- A relatively high proportion of working-age households with children, and
- A significant number of low-income working families whose earnings are supplemented by Universal Credit.

Under an earnings-only model, these families retain more support because their Universal Credit, child benefit, or other unearned income is disregarded. This reduces the effective taper that currently withdraws support as total income rises, allowing families to keep more of their CTR as they move into or progress in work.

Therefore, this additional cost may be considered value for money when we consider the gains, potential higher collection of lower amounts of Council Tax and contribution towards poverty and employment strategies.

What the data shows (Option 3 vs. current scheme)

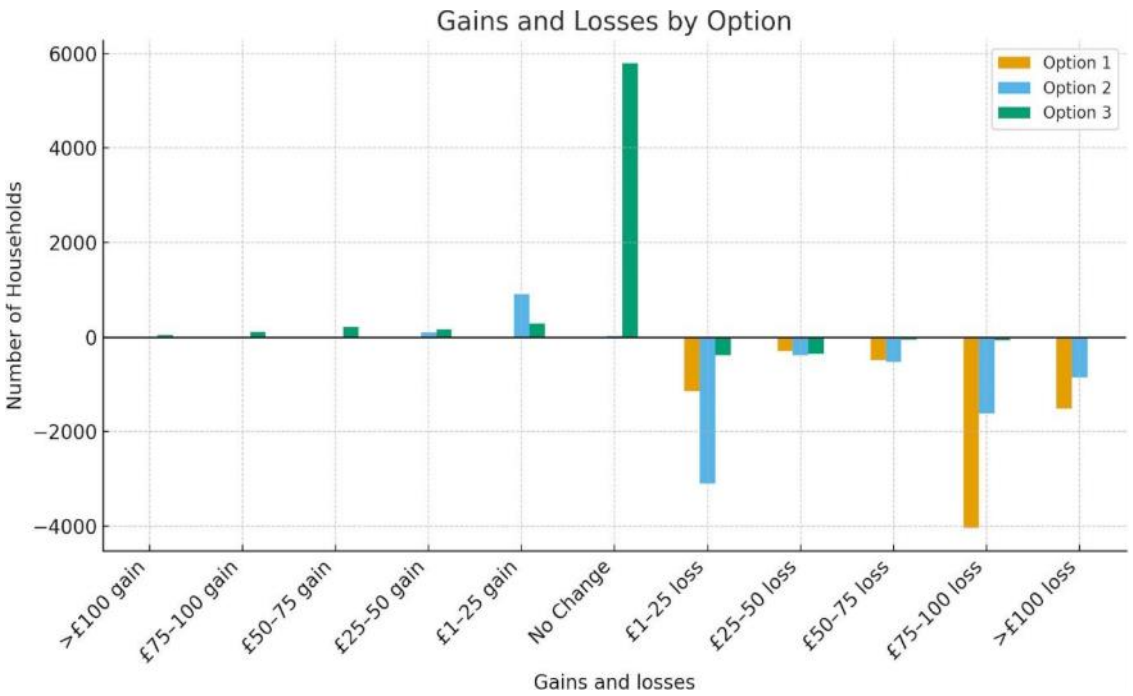
Strengths	- The average CTS award would increase to 79% up from 74% now - 98.3% of the current caseload would receive the maximum 80% CTR - Only 16 household would lose eligibility to CTR - This Option is the only one to deliver a net benefit to the caseload - Flat rate non-dependent deductions are easier to administer as they require less verification and administration - Option 5 presents gains for all families with children
Weaknesses	- The introduction of a flat rate non-dependent deduction would not take individual non-dependent circumstances into account
Who is at risk?	- Households with multiple non-dependents
Who is better protected?	- Families with children - All groups see a net gain
Is Option 3 better or worse than the current scheme?	- Better. The scheme provides greater support for families with children while increasing the average award overall.
Administrative and behavioural impacts	- More generous schemes are linked to higher collection rates - Efficiencies will be realised through the reduction in processing work and subsequent contact, and therefore enable capacity building in key areas such as collection and welfare.
Mitigations and implementation safeguards	- There are few mitigations other than considering lower flat rate non-dependent deductions.

Comparative Assessment of CTS Options

A side-by-side comparison of the options provides an at-a-glance overview of wins and losses by amount, and by household types.

Overall Loss and Gain Distribution (All Options) Gains and losses	**Option 1**	**Option 2**	**Option 3**
>£100 gain	0	0	42
£75–100 gain	0	2	112
£50–75 gain	0	1	214
£25–50 gain	2	94	158
£1–25 gain	2	904	291
No Change	10	17	5,788
£1–25 loss	1,147	3,093	380
£25–50 loss	294	381	359
£50–75 loss	489	528	50
£75–100 loss	4,034	1,612	64
>£100 loss	1507	853	27

Total	7,485	7,485	7,485



Across different groups, losses and gain vary with Option 3 providing the greatest overall gains.

Group	Option 1		Option 2		Option 3	
	Loss	**Gain**	**Loss**	**Gain**	**Loss**	**Gain**
In Work	3,346	1	3,293	5	309	686
Not in work	4,130	0	3,183	0	572	154
Singles	4,078	0	3,159	0	442	3,339
Couples	546	0	476	0	122	352

Couple with Children	1,197	1	1,188	1	130	868
Single with Children	1,655	4	1,653	4	187	1,215

Below is a comparative summary of the three CTS options rated across three key dimensions: progressiveness, household impact, and administrative savings. Ratings are on a 1–5 scale (1 = least favourable, 5 = most favourable) with brief commentary under each measure.

Option	Description (in brief)	Progressiveness	Household Impact	Administrative Savings
Option 1	· Income banded · Band C cap · All income · 37% minimum contribution · Flat rate non-dep deductions · Low income bands	**1/5** – 99.8% of claimants would be worse off Almost all families with children would be made worse off with 83% being more than £75 a month worse off	**1/5** – 99.8% of claimants would be worse off 83% of families with children would be worse off by £75 or more each month	**2/5 –** a lower caseload would require less administration to process claims but this administration would be shifted to collection, debt recovery, and customer services.

Option 2	· Income banded · Band B cap · All income · Flat rate non-dep deductions · 100% maximum award · Low income bands	**1/5** – This scheme would disproportionately affect families with children. While 86.4% of all claimants would be worse off, this percentage increases to 99.4% for families with children. Conversely 77.5% of single claimants would be made worse off.	**2/5** – Greater financial increases for families with children with less impact on those households without children.	**2/5** – As with Option 1, a lower caseload would mean fewer claims to process. But these savings are likely to be offset by lower collection rates, higher customer contact, and higher collection and recovery costs.
Option 3	· Income banded · 20% minimum contribution · Earnings only · Flat rate non-dep deductions · Higher income bands	**5/5** – almost all current claimants would be better off or would see no change. 16.7% of families with two children would be better off, and 15.5% of families with one child would see increased support.	**4/5** – Very few large losses. The highest earning 11% of the current caseload would see an average decrease in support of £35.21 per month with the lowest earning 11% seeing an average increase of £45.94 per month.	**3/5** – Earning only schemes can provide administrative savings, as can flat rate non-dependent deductions. The council is likely to see lower increases in collection and recovery activity and lower customer contact.

Summary Commentary

- **Most Progressive: Option 3** scores highest for progressiveness, with lower income households benefitting more from the scheme design and earnings only assessments.
- **Best for Households: Option 3** also performs best for impact on households with almost all households retaining or increasing their current award.
- **Best for Administration: Options 1 and 2** may technically reduce CTS assessment administration. But this saving would be off set by increased collection and recovery activity and higher front line contact.
- **Overall Balance: Option 3** appears the most balanced model—moderately progressive, low household disruption, and administratively manageable.

Option 3 presents the only scheme to increase its generosity and progressivity. This scheme will provide administrative savings, and is also less likely to increase administrative burdens elsewhere in the collection and recovery process. Furthermore the scheme provides equity for families whilst it's increased simplicity will ensure it is easier for residents to understand.

Appendix A: Option parameters

Option 1 Parameters

Parameter Name	Option 1 Value
CTS Type	Income banded

Protected Groups	Disability premium Lone parent premium Disabled child premium Carer premium Armed Forces related benefits
Maximum Council Tax Band	Band C
Capital Maximum (£)	£6,000
Lower Capital Limit (£)	£0
Maximum Amount (%)	63%
Taper (%)	20%
Earnings Only	No
Universal Credit Income	Yes
Use Existing Non-dependan Model	No
Use Flat Non-dependant Discount	Yes
Non-dependant Discount (£/month)	£65

Option 1 Income Band Table

Discount (%)	Single	Single +1 Child	Single +2 Child	Single +3+ Child	Couple	Couple +1 Child	Couple +2 Child	Couple +3+ Child
63	0	0	0	0	0	0	0	0
48	99	190	290	290	170	261	358	358
33	147	238	350	350	215	309	447	447
10	198	311	447	447	276	389	529	529
0	222	338	480	480	297	416	566	566

Option 2 Parameters

Parameter Name	Option 2 Value
CTS Type	Income banded
Protected Groups	Disability premium Lone parent premium Disabled child premium Carer premium
Maximum Council Tax Band	Band B
Capital Maximum (£)	£8,000
Lower Capital Limit (£)	£6,000
Maximum Amount (%)	100%
Taper (%)	20%
Earnings Only	No
Universal Credit Income	Yes
Use Existing Non-dependant Model	No
Use Flat Non-dependant Discount	Yes
Non-dependant Discount (£/month)	£40

Option 2 Income Band Table

Discount (%)	Single	Single +1 Child	Single +2 Child	Single +3+ Child	Couple	Couple +1 Child	Couple +2 Child	Couple +3+ Child
100	0	0	0	0	0	0	0	0
75	500	500	500	500	500	500	500	500
50	575	575	575	575	575	575	575	575

25	650	650	650	650	650	650	650	650
0	700	700	700	700	700	700	700	700

Option 3 Parameters

Parameter Name	Option 3 Value
CTS Type	Income banded
Protected Groups	Disability premium Lone parent premium Disabled child premium Carer premium
Maximum Council Tax Band	Band B
Capital Maximum (£)	£8,000
Lower Capital Limit (£)	£6,000
Maximum Amount (%)	80%
Taper (%)	20%
Earnings Only	Yes
Universal Credit Income	No
Use Existing Non-dependant Model	No
Use Flat Non-dependant Discount	Yes
Non-dependant Discount (£/month)	£40

Option 3 Income Band Table

Discount (%)	Single	Single +1 Child	Single +2 Child	Single +3+ Child	Couple	Couple +1 Child	Couple +2 Child	Couple +3+ Child

80	0	0	0	0	0	0	0	0
60	1	200	300	300	100	200	300	300
40	500	700	800	800	600	700	800	800
20	900	1100	1200	1200	1000	1100	1200	1200
10	1400	1600	1800	1800	1500	1700	1800	1800
0	2000	2200	2300	2300	2100	2200	2300	2300

Appendix B Trafford ruling

Based on the High Court judgment in R (LL and AU) v Trafford MBC [2025] EWHC 2380 (Admin), there are two principal legal findings that are directly relevant to any proposed Council Tax Support (CTS) scheme:

Legal adoption process (Ground 1)

The Trafford ruling confirmed that:

- Only Full Council can lawfully adopt or revise a CTS scheme under Section 67(2)(aa) of the Local Government Finance Act 1992.
- Delegating approval to an Executive Committee or officer (even "in consultation with" the portfolio holder) is unlawful.
- The scheme itself must be formally approved by Full Council, not merely noted or referenced as part of the wider budget papers.

Implications:
If any of the options (1–5) were to be adopted by Cabinet, Executive, or via delegated authority to the Section 151 Officer, this would breach the Trafford ruling.

Adoption must be explicit and minuted at Full Council, including the final income bands, disregards, and parameters.

Design flaw and discrimination (Ground 2)

The Court also found the Trafford scheme irrational and discriminatory because:

- It double-counted certain income, notably occupational pensions, and Carer's Allowance, that had already reduced Universal Credit entitlement.
- This meant disabled applicants and carers were treated less favourably than others with identical actual income, breaching:
    - The Public Sector Equality Duty (s.149 Equality Act 2010), and
    - Sections 15 and 19A of the Equality Act (direct and associative disability discrimination).

Implication for the proposed scheme:

To comply with the ruling, Bury's CTS model must:

- Avoid double counting any income already deducted in the UC calculation (e.g., occupational pensions, contributory ESA, Carer's Allowance).
- Clearly disregard UC elements such as housing, carer, limited capability for work, and disabled child components.
- Demonstrate, through an Equality Impact Assessment, that disabled people and carers are not put at a disadvantage by the banding or capital rules.

To remain compliant post-Trafford:

1. **Full Council approval** – with clear minute adopting the *final scheme* and all income bands.
2. **Explicit income disregards** – align with DWP UC rules and ensure that occupational pensions, carers' allowance, and contributory ESA are not double-counted.
3. **Equality Impact Assessment** – specifically test disabled households and carers for adverse impact.
4. **Avoid reliance on discretionary hardship relief** as the primary correction mechanism; it must only handle exceptional cases.

Conclusion

If properly adopted by Full Council and designed with clear statements about avoiding double-counting, all options would comply with the Trafford ruling.

Appendix C Other considerations

Work incentives and behavioural impact

CTS schemes continue to shape work incentives for low-income households. The interaction between CTS withdrawal, Universal Credit tapering and other deductions can significantly affect the net benefit of increasing working hours. With the Universal Credit earnings taper set at 55 per cent, poorly aligned CTS bands can create high marginal deduction rates that discourage progression in work. Simplified income bands and smooth transitions reduce these effects and make part-time or variable-hour work more viable. In a cooling labour market with rising economic inactivity, supporting steady work progression through scheme design remains important.

Changes to government benefits and allowances

Welfare reforms and uprating decisions directly influence CTS caseloads and costs. Working-age benefits were uprated for 2025–26 in line with inflation, but the freeze on Local Housing Allowance rates continues to limit rent support and increase pressure on household finances.

From April 2026, the Universal Credit Act 2025 will increase the standard allowance while revising the structure of health- and disability-related additions. These changes may alter income levels for some households, particularly disabled applicants, and carers. Councils will need to review CTS premiums, income thresholds, and disregards to ensure consistency with new DWP rules and to prevent unintended financial losses for vulnerable residents.

Aligning CTS treatment of income and capital with DWP systems remains good practice for administrative simplicity and transparency.

Interaction with other discretionary schemes

CTS operates within a wider network of local financial support, including Discretionary Housing Payments, Local Welfare Provision, and hardship funds. If CTS design increases household Council Tax liability, demand for these discretionary schemes is likely to rise. Coordinating assessment, referral and funding across these support streams reduces duplication and helps ensure residents do not

fall through gaps. A single access point or “front door” approach can improve efficiency and claimant experience.

Administrative costs and delivery considerations

Changes to CTS parameters have operational implications for revenues and benefits teams. Frequent Universal Credit updates, non-standard income assessments and software reconfiguration all carry cost and capacity pressures. Schemes that mirror UC definitions, minimise micro-banding, and automate data updates reduce the administrative burden.

Council Tax arrears and enforcement

The design of CTS schemes has a direct impact on arrears. Requiring small minimum payments from low-income households tends to increase debt and enforcement activity, with associated social and administrative costs. Early engagement, hardship relief, and flexible payment arrangements can mitigate these risks. The Government’s review of Council Tax administration and enforcement is expected to promote earlier support and greater proportionality; CTS schemes that minimise uncollectable balances will align with this direction.

Links to housing benefit and housing costs

For pension-age applicants, CTS continues to align closely with Housing Benefit. For working-age households, separation of rent and Council Tax support under Universal Credit can cause confusion and budgeting challenges. The continued freeze in Local Housing Allowance rates adds further strain, as rent shortfalls increase. Linking CTS and housing data helps councils identify households at risk of arrears and target support more effectively.

Summary

- Simplified, well-aligned CTS schemes strengthen work incentives and reduce churn.
- The 2026 Universal Credit changes and ongoing LHA freeze will increase financial pressure on low-income households and may raise CTS demand.
- Rising long-term sickness and disability necessitate protections for vulnerable applicants.
- Reducing small minimum payments and improving early intervention will help prevent arrears.

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Bury Council Tax Support Scheme 2026 public consultation analysis

Approach

Following Cabinet approval, the public consultation was launched on 6th November, running for a 5-week period until 11th December.

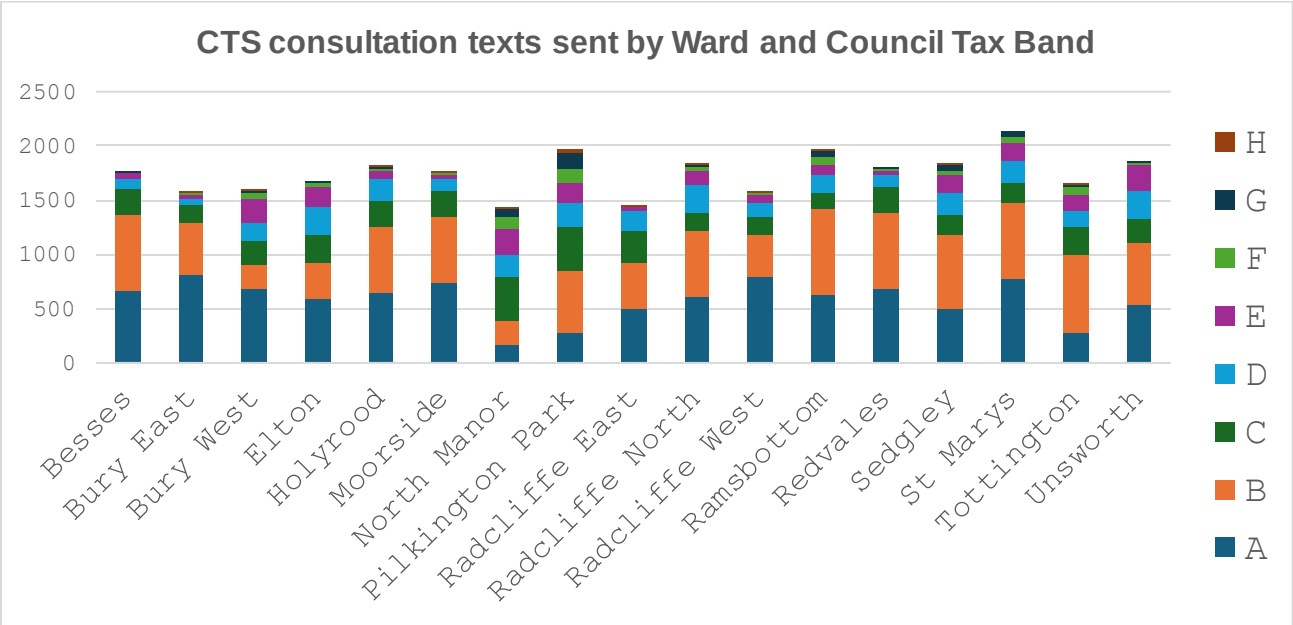
The consultation focused on the specific changes being proposed to the scheme, whilst aiming to capture detail on the types of households providing responses.

Resident feedback was to be collated through an online survey, with a dedicated mailbox provided for submission of queries or issues, and resident Support Hubs available to support residents with face-to-face advice as well as assisted survey completion.

Along with prominence across the council's website, social media posts and a press release were used to initially advertise the consultation to residents.

To ensure the opportunity to contribute to the consultation reached a broad range of residents from across the borough, mass texting software was deployed whereby a direct link to the survey was provided along with details of the mailbox and support hubs.

29,602 texts were sent out to residents across the 5-week period, with Ward and Council Tax Band designations being used to provide a borough-wide reach.

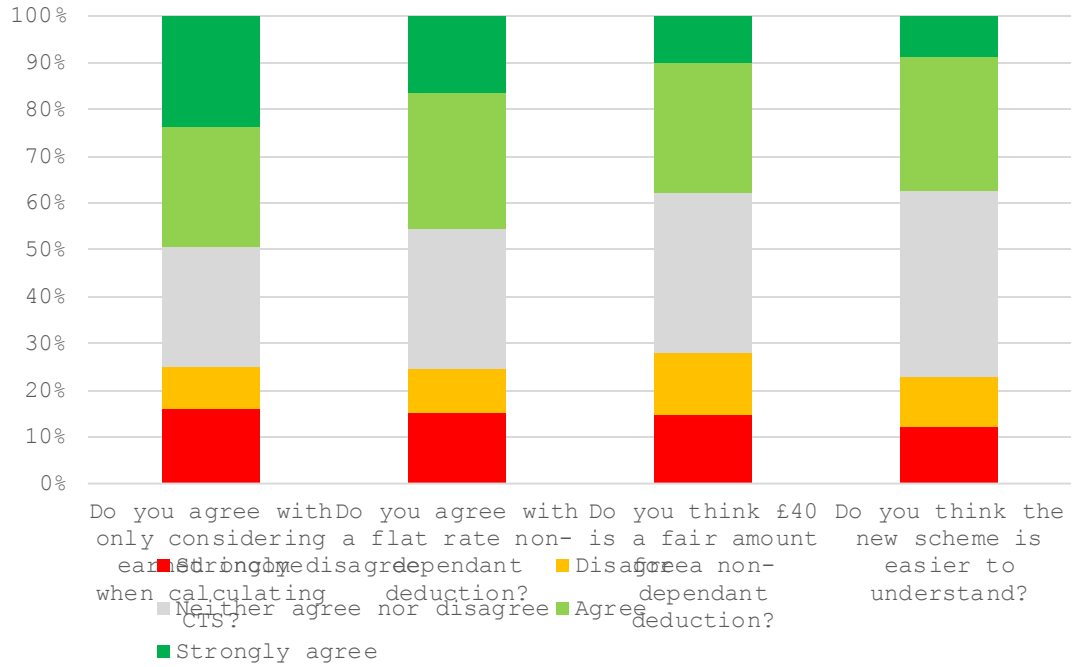


By consultation close, 1,333 responses had been received. For context, the last Council Tax Support public consultation in 2016 attracted 46 responses.

Of the 1,333 respondents, 580 were in receipt of CTS, whilst 753 residents were not in receipt.

Given the above, the response rate represents a significant improvement on previous consultations and most importantly provides a meaningful representation of resident feedback on the proposal.

Consultation results – summary of responses



	Do you agree with only considering earned income when calculating CTS?	Do you agree with a flat rate non-dependant deduction?	Do you think £40 is a fair amount for a non-dependant deduction?	Do you think the new scheme is easier to understand?
Strongly disagree	212	200	198	160
Disagree	120	125	175	145
Neither agree nor disagree	342	402	457	530
Agree	340	385	369	382
Strongly agree	319	221	134	116

Q1) Do you agree with only considering earned income when calculating CTS?

49% of residents either strongly agreed or agreed with this element of the proposal, with 25% of residents either strongly disagreeing or disagreeing.

Q2) Do you agree with a flat rate non-dependent deduction?

45% of residents either strongly agreed or agreed with this element of the proposal, with 24% of residents either strongly disagreeing or disagreeing.

Q3) Do you think £40 is a fair amount for a non-dependent deduction?

38% of residents either strongly agreed or agreed with this element of the proposal, with 28% of residents either strongly disagreeing or disagreeing.

Q4) Do you think the new scheme is easier to understand?

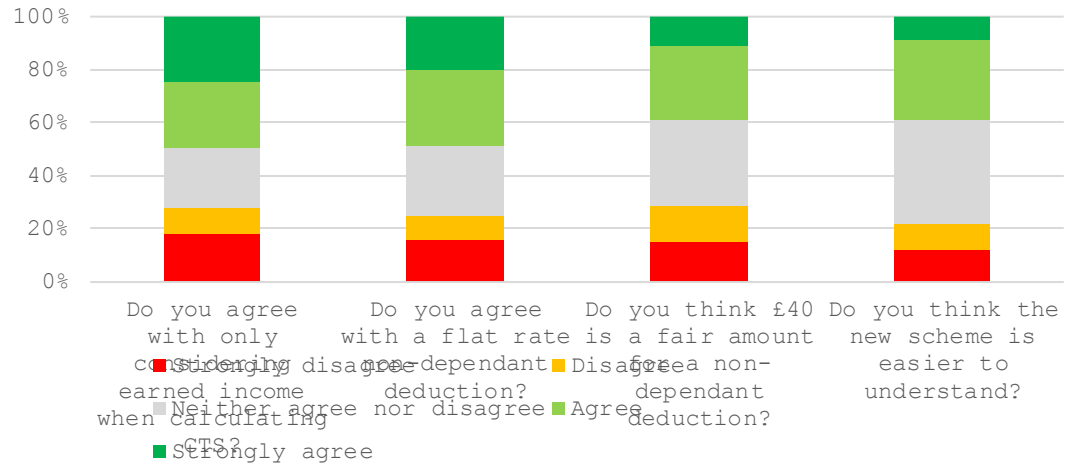
37% of residents either strongly agreed or agreed with this element of the proposal, with 23% of residents either strongly disagreeing or disagreeing.

Additionally, the survey captured responses by those currently in receipt of Council Tax Support and those not in receipt is provided below:

In receipt of Council Tax Support

	Do you agree with only considering earned income when calculating CTS?	Do you agree with a flat rate non-dependant deduction?	Do you think £40 is a fair amount for a non-dependant deduction?	Do you think the new scheme is easier to understand?
Strongly disagree	75	83	84	70
Disagree	45	55	75	70
Neither agree nor disagree	173	203	209	236
Agree	155	167	162	156
Strongly agree	132	72	50	48

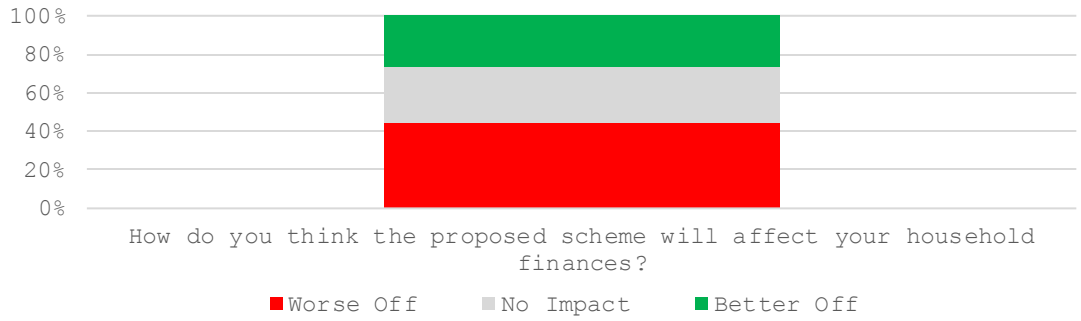
Not in receipt of Council Tax Support



	Do you agree with only considering earned income when calculating CTS?	Do you agree with a flat rate non-dependant deduction?	Do you think £40 is a fair amount for a non-dependant deduction?	Do you think the new scheme is easier to understand?
Strongly disagree	137	117	114	90
Disagree	75	70	100	75
Neither agree nor disagree	169	199	248	294
Agree	185	218	207	226
Strongly agree	187	149	84	68

The survey also captured responses from households directly impacted by some of the key changes, namely those with non-dependants and those with children.

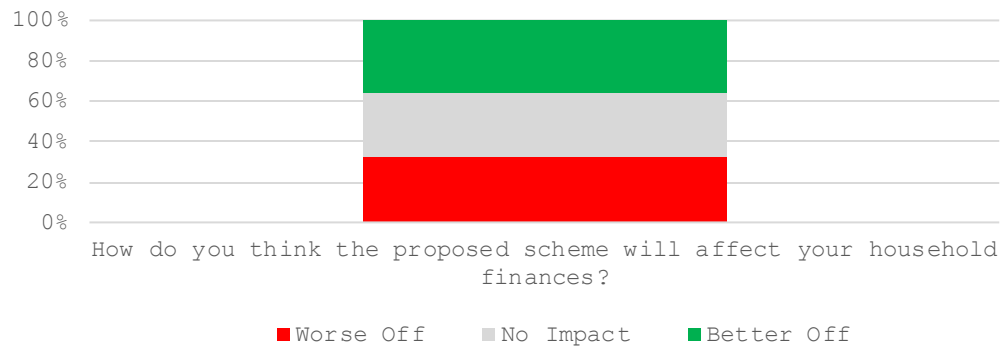
Non-dependants



	How do you think the proposed scheme will affect your household finances?
Worse Off	132
No Impact	86
Better Off	77

55% of residents with non-dependants believed they would either be better off or that they would see no impact under the new scheme, whilst 45% of residents with non-dependants believed they would be worse off under the proposal.

Households with children



	How do you think the proposed scheme will affect your household finances?
Worse Off	159
No Impact	160
Better Off	179

68% of residents with children believed they would either be better off or that they would see no impact under the new scheme, whilst 32% of residents with children believed they would be worse off under the proposal.

Conclusion

The survey results demonstrate that whilst some residents disagree with certain measures being proposed, there is broad approval for the changes being put forward. It is therefore considered that the public consultation, it's response rate, range of respondents and its results provide a mandate for making the proposed changes to the Council Tax Support scheme.

Monitoring (please see following page)

Bury Council

Age

16-24	10
25-34	138
35-44	324
45-55	337
55-65	353
Over 65	136
Prefer not to say	35

Gender identity

Female	812
Male	476
Prefer not to say	45

Sexual orientation

Heterosexual / Straight	1142
Gay/lesbian	42
Bisexual	18
Other	7
Prefer not to say	124

Ethnic group

White	1069
Mixed / multiple ethnic groups	37
Asian	86
Black	35
Other ethnic group	29
Prefer not to say	77

Caring responsibilities

Yes	214
No	1058
Prefer not to say	61

Total household income

Up to £20,000	486
£20.001 to £40,000	306
£40,001 to £60,000	135
Over £60,000	105
Prefer not to say	301

Equality Impact Analysis

This equality impact analysis establishes the likely effects both positive and negative and potential unintended consequences that decisions, policies, projects and practices can have on people at risk of discrimination, harassment and victimisation. The analysis considers documentary evidence, data and information from stakeholder engagement/consultation to manage risk and to understand the actual or potential effect of activity, including both positive and adverse impacts, on those affected by the activity being considered.

To support completion of this analysis tool, please refer to the equality impact analysis guidance.

Section 1 – Analysis Details (Page 5 of the guidance document)

Name of Policy/Project/Decision	Council Tax Support Scheme 2026
Lead Officer (SRO or Assistant Director/Director)	Chris Brown
Department/Team	Corporate Collection and Support
Proposed Implementation Date	1st April 2026
Author of the EqIA	Chris Brown
Date of the EqIA	27/10/2025

1.1 What is the main purpose of the proposed policy/project/decision and intended outcomes?
To review and reform the council's Council Tax Support scheme for working age residents, in order to make it more equitable, efficient to administer, whilst remaining as cost-neutral as possible. Bury Council Tax Support Scheme 2026.docx

Section 2 – Impact Assessment (Pages 6 to 10 of the guidance document)

2.1 Who could the proposed policy/project/decision likely have an impact on?
Employees: **No –** the scheme provides financial support to residents. Community/Residents: **Yes** Third parties such as suppliers, providers and voluntary organisations: **No -** the scheme provides financial support to residents. If the answer to all three questions is 'no' there is no need to continue with this analysis.

2.2 Evidence to support the analysis. Include documentary evidence, data and stakeholder information/consultation
Documentary Evidence: Bury Council Tax Support Scheme 2026 Options Analysis.docx
Data: **Please see embedded link in previous section**
Stakeholder information/consultation: **The purpose of the Cabinet report is to seek approval to publicly consult on the proposed scheme, and therefore consultation will be undertaken following this. The consultation exercise will include consulting with residents, stakeholders and public advocate bodies.**

2.3 Consider the following questions in terms of who the policy/project/decision could potentially have an impact on. Detail these in the impact assessment table (2.4) and the potential impact this could have.

- Could the proposal prevent the promotion of equality of opportunity or good relations between different equality groups?
- Could the proposal create barriers to accessing a service or obtaining employment because of a protected characteristic?
- Could the proposal affect the usage or experience of a service because of a protected characteristic?
- Could a protected characteristic be disproportionately advantaged or disadvantaged by the proposal?
- Could the proposal make it more or less likely that a protected characteristic will be at risk of harassment or victimisation?
- Could the proposal affect public attitudes towards a protected characteristic (e.g. by increasing or reducing their presence in the community)?
- Could the proposal prevent or limit a protected characteristic contributing to the democratic running of the council?

2.4 Characteristic	Potential Impacts	Evidence (from 2.2) to demonstrate this impact	Mitigations to reduce negative impact	Impact level with mitigations Positive, Neutral, Negative
Age	Neutral	The scheme in respect of pension age applicants is defined by Central Government within the Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012 and the Local Government Finance Act 1992 (as amended). The Council has no discretion in relation to the calculation of Council Tax reduction in respect of the pension age scheme and it is designed to provide broadly the same level of support provided within the previous (Council Tax Benefit) scheme.		
Disability	Positive	By disregarding disability related benefits and affording further protection for households with		

		a disability, the scheme makes additional provision for those with a disability.		
Gender Reassignment	Neutral	No differential impact identified		
Marriage and Civil Partnership	Neutral	No differential impact identified		
Pregnancy and Maternity	Neutral	No differential impact identified		
Race	Neutral	No differential impact identified		
Religion and Belief	Neutral	No differential impact identified		
Sex	Neutral	No differential impact identified		
Sexual Orientation	Neutral	No differential impact identified		
Carers	Positive	The scheme provides additional protection for those residents classed as carers.		
Looked After Children and Care Leavers	Neutral	No differential impact identified. Care Leavers are exempt from paying Council Tax in Bury.		
Socio-economically vulnerable	Positive	The scheme provides support towards paying a priority debt for residents on a low income. The proposed scheme also provides increased support for families with children.		
Veterans	Positive	The scheme provides additional protection for those residents in receipt of Armed Forces-related		

		benefits and compensation payments.		

Actions required to mitigate/reduce/eliminate negative impacts or to complete the analysis

2.5 Characteristics	Action	Action Owner	Completion Date

Section 3 - Impact Risk

Establish the level of risk to people and organisations arising from identified impacts, with additional actions completed to mitigate/reduce/eliminate negative impacts.

3.1 Identifying risk level (Pages 10 - 12 of the guidance document)

Impact x Likelihood = Score			Likelihood			
			1	2	3	4
			Unlikely	Possible	Likely	Very likely
Impact	4	Very High	4	8	12	16
	3	High	3	6	9	12
	2	Medium	2	4	6	8
	1	Low	1	2	3	4

	0	Positive / No impact	0	0	0	0

Risk Level	No Risk = 0	Low Risk = 1 - 4	Medium Risk = 5 – 7	High Risk = 8 - 16

3.2 Level of risk identified	Medium
3.3 Reasons for risk level calculation	The number of residents who's level of support would decrease is relatively small, and the overwhelming majority of residents (88%)currently receiving Council Tax Support (88%), would either benefit financially or be no worse off as a result of the changes. However, there is still the potential for formal complaints from those who feel they have lost out, as well as the potential for this being covered by the local media.

Section 4 - Analysis Decision (Page 11 of the guidance document)

4.1 Analysis Decision	X	Reasons for This Decision
There is no negative impact therefore the activity will proceed		
There are low impacts or risks identified which can be mitigated or managed to reduce the risks and activity will proceed	X	Whilst complaints may be received, it is the intention of the service to pro-actively contact those Council Tax Support recipients who would lose out prior to implementation on 1st April in order to provide preventative support and advice.
There are medium to high risks identified which cannot be mitigated following careful and thorough consideration. The activity will proceed with caution and this risk recorded on the risk register, ensuring continual review		

Section 5 – Sign Off and Revisions (Page 11 of the guidance document)

5.1 Sign Off	Name	Date	Comments

Lead Officer/SRO/Project Manager	Chris Brown	27/10/25	
Responsible Asst. Director/Director			
EDI	L.Cawley	28/10/25	QA Complete. Full impacts have been identified and considered. Impacts are likely to be neutral or positive for specific characteristics and circumstances. There is an understanding that varying individual circumstances could result in greater impact however mitigations are in place to provide support where this is the case

EqIA Revision Log

5.2 Revision Date	Revision By	Revision Details

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Agenda Item 9

Classification:	Decision Type:
Open	Non-Key

Report to:	Cabinet	**Date:** 15 January 2026
Subject:	2025-26 Q2 Finance Position	
Report of	Cabinet Member for Finance and Transformation	

Summary

1. To present to members the 2025/26 forecast revenue outturn position as at 30 September 2025.

2. To present to members the 2025/26 forecast savings position as at 30 September 2025.

3. To present to members the 2025/26 forecast capital outturn position as at 30 September 2025.

4. To present to members the 2025/26 forecast Collection Fund position as at 30 September 2025.

5. To present to members the updated 2025/26 forecast for the Housing Revenue Account (HRA) position as at 30 September 2025

Recommendation(s)

6. Cabinet is asked to:

   - Note the 2025/26 forecast revenue outturn position as at 30 September 25 of a £5.861m overspend (2.45%) against a net budget of £238.988m.

   - Note the 2025/26 forecast savings position as at 30 September 2025 of a forecast underachievement of £2.031m (-17.92%) against an agreed target of £11.344m.

   - Approve the in-year updates to the capital programme, revising the capital delivery programme for 2025/26 to £124.561m which will form the basis for future in-year monitoring and reporting of performance.

   - Note the 2025/26 forecast Collection Fund Position as at 30 September 2025 of a surplus of £1.186m of which £1.103m relates to Bury's share.

Reasons for recommendation(s)

7. To update members on the Council's budgetary position and actions taken or being taken to ensure budgetary targets are achieved.

8. This report is in accordance with the Council's financial procedure regulations.

Alternative options considered and rejected

9. N/A

Report Author and Contact Details:

Name: Neil Kissock
Position: Director of Finance
Department: Corporate Core
E-mail: n.kissock@bury.gov.uk

Background

2025/26 Quarter 2 Forecast Outturn Position

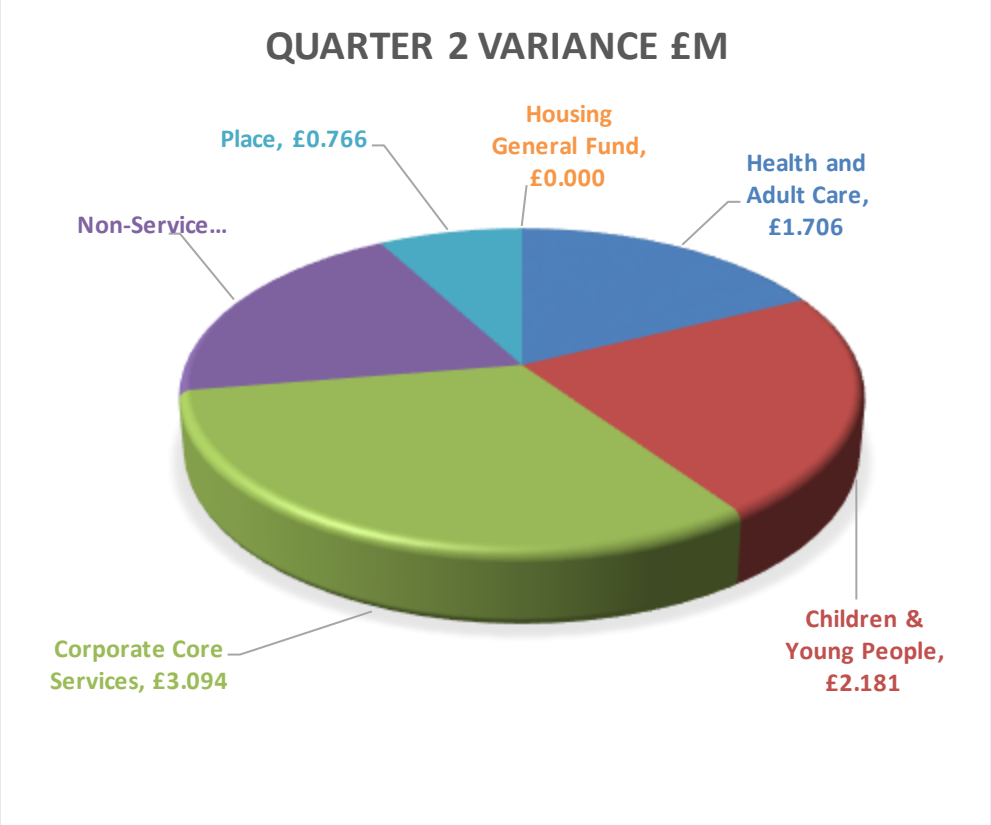
10. There has been an amendment to the Health and Adult Care budget with a contra increase in grant income budget within the funding department to recognise additional grant funding received, bringing the budget to monitor against to £238.988m.

11. The 2025/26 general fund revenue month 6 forecast outturn position is currently projecting an overspend of £5.861m which represents a variance of 2.45% compared to the overall net revenue budget of £238.988m and a £1.712m increase in the forecast overspend compared to the position reported at quarter 1. The forecast is based on expenditure and activity levels at Quarter 2, with assumptions made with regard to forecast changes over the rest of the year with the future demand and cost of adult and children's social care services being inherently difficult to predict.

12. The variance is in addition to an approved contribution from reserves of £5.858m to address the structural funding gap in the current year revenue budget set at February Council. Whilst the forecast variance remains a relatively small proportion of the budget, officers are currently prioritising work on cost reduction measures targeted at reducing the current forecast overspend position as far as possible over the remaining months of the financial year. Any overspend at year-end would necessarily become an additional call on reserves, which in turn impacts on the reserves available for use to stabilise the budget.

2025/26 Quarter 2 Forecast Outturn	Revised Budget £m	Quarter 2 Forecast Outturn £m	Quarter 2 Forecast Variance £m	Quarter 1 Forecast Variance £m	Movement £m

Directorate:					
Health and Adult Care	£98.678	£100.384	£1.706	£1.942	-£0.236
Children & Young People	£65.238	£67.418	£2.181	£3.017	-£0.836
Corporate Core Services	£31.416	£34.510	£3.094	£0.747	£2.348
Non-Service Specific	£28.510	£26.624	(£1.886)	(£1.557)	-£0.329
Place	£15.224	£15.990	£0.766	£0.000	£0.766
Housing General Fund	(£0.079)	(£0.079)	£0.000	£0.000	£0.000
NET REVENUE BUDGET	**£238.988**	**£244.848**	**£5.861**	**£4.148**	**£1.712**
Funding:					
Council Tax	(£119.350)	(£110.198)	£0.000	£0.000	£0.000
Business Rates	(£74.276)	(£74.276)	£0.000	£0.000	£0.000
Government Funding Grants	(£39.503)	(£39.503)	£0.000	£0.000	£0.000
FUNDING	**(£233.129)**	**(£223.977)**	**£0.000**	**£0.000**	**£0.000**
Use of Reserves:					
Budget Stabilisation Reserve	(£5.858)	(£5.858)	£0.000	£0.000	£0.000
USE OF RESERVES	**(£5.858)**	**(£5.858)**	**£0.000**	**£0.000**	**£0.000**
BUDGET POSITION	**£0.000**	**£15.013**	**£5.861**	**£4.148**	**£1.712**



13. Details of the significant variances include:

Health and Adult Care:

The 2025/26 Health and Adult Care (HAC) Directorate budget is forecast to

overspend by £1.706m at month 6.

HAC Directorate Service Area	Revised Budget £m	Quarter 2 Forecast Outturn £m	Quarter 2 Forecast Variance £m	Quarter 1 Forecast Variance £m	Movement £m
Adult Social Care Operations	£9.381	£8.254	(£1.127)	(£0.537)	(£0.516)
Care in the Community	£62.098	£65.520	£3.422	£2.586	£2.124
Commissioning & Procurement	£10.086	£10.050	(£0.036)	£0.045	(£0.002)
Departmental Support Services	£2.250	£2.207	(£0.043)	£0.018	(£0.042)
Sub Total	**£83.815**	**£86.031**	**£2.216**	**£2.112**	**£1.564**
Public Health	£11.482	£11.260	(£0.222)	£0.045	(£0.178)
Sub Total	**£11.482**	**£11.260**	**(£0.222)**	**£0.045**	**(£0.178)**
Wellness	£2.787	£2.573	(£0.214)	(£0.215)	£0.023
Arts & Museums	£0.594	£0.519	(£0.075)	£0.000	(£0.070)
Sub Total	**£3.381**	**£3.092**	**(£0.289)**	**(£0.215)**	**(£0.047)**
Total	**£98.678**	**£100.383**	**£1.706**	**£1.942**	**£1.339**

- The Care in the Community budget is forecast to overspend by £3.422m (5.5%) which is a £0.836m increase on the position reported at quarter 1.

To partially mitigate the position, a total of £0.800m of related service reserves have been applied in line with the intended use of the reserves. This has the result of reducing the overspend reflected in the Care in the Community budget.

The service settings driving the overspend are Supported Living, Direct payments and Home Care.

A programme of work supported by an organisation (Impower) that specialises in transforming public services is underway to address the additional c£4m budget pressure that was noted at Cabinet in July as part of the 2024/25 outturn report. The overall objective of the transformational work is to:

- Co-produce multiple trajectories to explore potential cost avoidance and savings opportunities.
- Deliver an intervention to increase efficiency and capacity in Reablement, enabling increased use of Reablement for Hospital Discharge.
- Deliver an intervention to undertake targeted reviews in Mental Health, with wrap around support and impact tracking.
- Review work to date on embedding a strengths-based approach, deliver an intervention to trial next steps for embedding in one community team and develop a full roll out plan.

Initial expectations at quarter 1 was the £4m savings would be fully achieved by 31 March 2026, however, while savings from the Impower supported activities are being delivered they will not be fully realised in year but in 2026/27 reflecting the full-year impact of when savings have begun to be achieved. This area will remain under detailed review and progress updates provided to future Cabinet meetings in the quarterly reports.

To compensate for this, a further £2.3m of mitigation initiatives have been identified and are built into the quarter 2 forecast. However, the net increase in demand for the first 6 months of the year is c£2.050m and consequently the additional savings have largely been offset through the additional commissioning of care packages.

- The Adult Social Care Operations budget is forecast to underspend by £1.127m. (12%). The main drivers of the underspend are staffing vacancies within the following teams:
  - Choices for Living Well
  - Community Mental Health Team
  - Integrated Neighbourhood Teams
  - Assessment and Care Management Team
  - Older People Mental health team
  - Technology Enabled Care (TEC) Team

The ASC workforce retention strategy continues to recruit Social Workers in Operational teams thereby strengthening focus on delivery of care package savings. However, recruiting to vacant posts remains a challenge and therefore affects the ability to deliver services to their full capacity.

- The Commissioning and Procurement budget is forecast to underspend by £0.036m (0.4%)

- The Departmental Support Services budget is forecast to underspend by £0.043m (2.0%) which is a £0.061m reduction on the position reported at quarter 1, due to a staffing budget underspend within the Adult Social Care Financial Support team.

- The Public Health budget is forecast to underspend by £0.222m (1.9%) which is a £0.267m reduction on the quarter 1 reported position due to staff vacancies and reduced activity on the NHS Health checks and GM Sexual Health contracts.

- The Wellness budget is forecast to underspend by £0.214m (7.7%) which is broadly in line with the underspend reported at quarter 1. The underspend is the net impact of the closure of the Radcliffe Leisure centre and staffing vacancies across the Leisure budget portfolio.

- Arts and Museums are forecast to underspend by £0.075 due to the closure of the Tourist Information Centre.

Children and Young People:

The Children and Young People Directorate is forecast to overspend by £2.181m (3.34%).

- The Safeguarding and Social Care service is forecast to overspend by £4.492m (9.05%) due to residential placement numbers and unit costs continuing to exceed the budgeted amount despite demand growth being built into the 2025/26

budget as the savings approved in relation to the stepping down of 7 placements has not yet been achieved. The service are progressing work on a number of fronts targeting delivery of a net reduction in residential placements that would reduce the forecast overspend position and potentially deliver better outcomes at lower cost for a number of children, but it is likely that the financial impact of the planned reduction will largely impact in 2026/27. Given the inherent financial risks in this service area, which is a national issue affecting all local authorities with social care responsibilities, it will remain under detailed review overseen by the Finance Board and updates provided to Cabinet as part of the quarterly reporting cycle. The pressures are partially being offset by a reduction in the Children with Disabilities residential placements and vacancy savings.

- Within Education and Inclusion, Home to School Transport is forecast to overspend by £0.440m due to increased pupil numbers (£0.310m) and increased costs of the provision (£0.130m).

- Children's commissioning service is forecast to overspend by £0.019m which is a reduction of £0.162m due to revised staffing forecast variances following the expansion of the commissioning team.

- There are offsetting underspends of £0.073m on Children's Services Management, reduced by £0.162m from the reported position at quarter 1 relating to staffing costs.

- Overall reductions in staffing and agency forecasts have improved the quarter 2 position.

Corporate Core Directorate

The Corporate Core Directorate is forecast to overspend by £3.094m (9.85%)

- People and Inclusion (HR) are forecasting an overspend of £0.560m (21.23%). This is primarily due to a historic shortfall in the 'education buy-back' budget totalling £0.285m (35.22%), which has widened as more maintained schools convert to academy status. Staffing is forecast to overspend by £0.234m of which £180k relates to agency staff. These pressures may be partially offset by an estimated £0.150m contribution from the Housing Revenue Account (HRA), subject to confirmation at year end.

- Finance is forecasting an overspend of £1.138m (10.62%) mainly due to the increased costs of insurance premiums. The procurement and resulting contract award wasn't finalised until after the 2025/26 budget was set and this has been reflected in the revised MTFS. There are also net staffing overspends, including severance costs offset by over-achievement of income

- Legal & Democratic Services is forecast to underspend by £0.362m (6.18%) mainly driven by a fallow year in Municipal Elections (£0.321m) and small forecast underspends under £0.100m on staffing and member expenses.

- Housing Needs and Options have a forecast overspend of £0.498m, largely in relation to pressures in relation to temporary accommodation costs.

- Overall increases in staffing and agency forecasts of £1.515m have been included in the quarter 2 position.

Non-Service Specific

The Non-Service Specific Department is forecast to underspend by £1.886m (6.6%) mainly in relation to higher than budgeted income from treasury investments alongside reduced borrowing costs reflecting the reprofiled capital programme.

Place Directorate

The Place Directorate is forecast to overspend by £0.766m in quarter 2.

- Waste, Transport and Stores are forecast to overspend by £0.456m
    - Waste is forecast to overspend by £0.341m which is due to a net overspend on staffing and agency costs of £0.177m, a daily hire vehicle forecast overspend of £0.072m and a net deficit on the Trade Waste function of £0.085m.
    - Transport is forecast to overspend by £0.115m, a combination of several minor variances under £0.100m
    - Stores is forecast to be on budget.

- Commercial Services is forecast to underspend by £0.151m,
    - Catering is forecasting a net underspend of £0.100m including overachievement of income of £0.300m, staffing underspend of £0.228m offset by overspends on food costs of £399m.
    - Caretaking and Cleaning additional relief income of £0.050m

- Street Scene Maintenance is forecast to underspend by £0.143m in relation to £0.300m underspend on street lighting costs offset by various overspends under £0.100m.

- Facilities Management is forecast to underspend by £0.099m which is due to an underspend on utilities of £0.323m, offset by an under-recovery of rents for Humphrey House of £0.175m, with various minor variances under £0.100m

- Engineers underspend £0.083m which is due to an overachievement of car parking income of £0.238m offset by net additional staffing costs in consultancy of £0.177m with various minor variances under £0.100m

- Housing Needs and Options underspend £0.082m in relation staff costs.
- Various minor variances under £0.100m
- Overall increases in staffing and agency forecasts of £0.951m have been included in the quarter 2 position.

Staffing costs

14. Included within the Departmental forecast positions are variances in relation to staffing and agency costs as seen in the table below. Within the net staffing / agency underspend is the achievement of the vacancy factor, 3 days unpaid leave and purchase of annual leave schemes totalling £3.521m.

2025/26 Quarter 2 Forecast	Staffing/Agency Budget £m	Staffing/Agency forecast	Staffing/ Agency Variance	Vacancy / leave savings target achieved £m
Directorate:				
Health and Adult Care	£29.612	£27.189	-£2.423	-£1.001
Children & Young People	£28.616	£25.164	-£3.452	-£0.511
Corporate Core Services	£28.405	£30.345	£1.940	-£1.148
Non-Service Specific	£0.178	£0.178	£0.000	£0.000
Place	£23.388	£23.788	£0.399	-£0.859
Housing General Fund	£0.000	£0.000	£0.000	£0.000
NET REVENUE BUDGET	**£110.200**	**£106.663**	**-£3.536**	**-£3.519**

The net forecast underspend relating to staffing after agency costs and the achievement of the agreed savings in relation to the vacancy factor and additional leave schemes is £3.536m.

Savings position

15. The table below show the forecast position for the savings proposals which have been approved at February 2025 along with the pre-approved February 2023 savings which come into force during 2025/26. The forecast is an underachievement of £2.031m (17.92%). The main reason for the underachievement is delayed implementation of restructures and other activities required to enable delivery of the agreed savings. Work is being undertaken, overseen by the Finance Board, to identify ways that the current estimated delays in savings delivery can be reduced and to identify mitigations to reduce the in-year financial impact. With the exception of the CYP Directorate placement savings, services are mitigating the delay in savings delivery within their existing budgets and are not forecasting

significant overspends in their areas. The proportion of savings currently achieved or mitigated within service is therefore 87.18%. It is currently anticipated that delayed savings will be fully achieved in full by 2026/27.

2025/26 Budget Proposals	Directorate	Feb 2025 Target	Quarter 2 Forecast	Quarter 2 Forecast Variance (over)/ underachievement
		2025/26 £m	£m	£m
Draft Budget Proposals (Operational Decision):				
HAC Strategic Workforce Review	HAC	(£0.010)	(£0.010)	£0.000
CYP Strategic Workforce Review	CYP	£0.000	£0.000	£0.000
CCS Strategic Workforce Review	CCS	(£0.186)	(£0.186)	£0.000
BGI Strategic Workforce Review	BGI	(£0.062)	(£0.062)	£0.000
OPS Strategic Workforce Review	OPS	(£0.145)	(£0.145)	£0.000
Adults Commissioning Review	HAC	(£1.000)	(£1.110)	(£0.110)
Single Handed Care Trial	HAC	(£0.200)	(£0.200)	£0.000
Personal Budget Review	HAC	(£0.250)	(£0.250)	£0.000
Direct Payment Reassessment to Include Therapy	HAC	(£0.050)	(£0.050)	£0.000
Discharge to Assess Reviews by Therapy	HAC	(£0.050)	(£0.050)	£0.000
Neighbourhood Housing Support	HAC	(£0.050)	(£0.050)	£0.000
ASC Community Care budget realignment	HAC	(£1.680)	(£1.680)	£0.000
Dividend income from Persona - one-off in 25/26	HAC	(£0.350)	(£0.350)	£0.000
Persona - remodel of supported living hours	HAC	(£0.330)	(£0.526)	(£0.196)
Persona - employability	HAC	£0.000	£0.000	£0.000
Persona - Willow Street (6 flats for decant from dispersed accommodation)	HAC	£0.000	(£0.070)	(£0.070)
Maximising charges for Deferred Payments	HAC	(£0.005)	(£0.005)	£0.000
Foster Carers	CYP	(£0.250)	£0.000	£0.250
Family Safeguarding Model	CYP	(£0.100)	£0.000	£0.100
Edge of Care	CYP	(£0.494)	£0.000	£0.494
Creation of Council-Owned Residential Children's Homes	CYP	£0.000	£0.000	£0.000
Therapeutic support team for Children in Care	CYP	(£0.195)	£0.000	£0.196
Reconnect - step down from residential care	CYP	(£0.571)	(£0.157)	£0.414
IT Supplier Review [Digital]	CCS	(£0.065)	(£0.065)	£0.000
IT licence Review [Digital]	CCS	(£0.050)	(£0.050)	£0.000
Unit 4 Reimplementation & Transformation Review	CCS	(£0.100)	(£0.100)	£0.000
Revenues and Benefits Structure Review	CCS	(£0.317)	(£0.181)	£0.136
Contact Centre Review [Digital]	CCS	(£0.100)	£0.000	£0.100
Corporate Core Structures including homelessness and housing options review and integration of communities	CCS	(£0.328)	(£0.328)	£0.000
Fleet Function Review	OPS	(£0.070)	£0.000	£0.070
Car Park Tariff Review	OPS	(£0.074)	(£0.150)	(£0.076)
Stores Function Review	OPS	£0.000	£0.000	£0.000
Explore Advertising opportunities on highway network	OPS	(£0.050)	£0.000	£0.050

Private Sector Housing - Capitalise salaries	OPS	(£0.100)	(£0.100)	£0.000
Public Protection / Licensing Budget Realignment	OPS	(£0.016)	(£0.016)	£0.000
Private Sector Rented - Enforcement HMO Licensing	OPS	(£0.005)	(£0.005)	£0.000
Salary Sacrifice Review	NSS	(£0.050)	(£0.050)	£0.000
Organisation Delivery Model Review	NSS	(£0.257)	(£0.257)	£0.000
Contract Efficiencies	NSS	(£0.500)	(£0.500)	£0.000
Total Budget Proposals (Operational Decision)		**(£8.060)**	**(£6.251)**	**£1.8009**
Budget Proposals (Policy Decision):				
Car Park Charges Review	OPS	(£0.055)	£0.000	£0.055
Light Reduction - Trim and Dim	OPS	£0.000	£0.000	£0.000
Review Residents Permits pricing structure	OPS	(£0.145)	£0.000	£0.145
Total Budget Proposals (Policy Decision)		**(£0.200)**	**(£0.000)**	**£0.200**
TOTAL FEB 2025 APPROVED BUDGET PROPOSALS		**(£8.260)**	**(£6.251)**	**£2.009**
Saving Already Agreed - Development of Wider Learning Disabilities Strategy for Age 14-25 Cohort	HAC	(£0.180)	(£0.158)	£0.022
Progressing the Edge of Care Service Review	CYP	(£0.506)	(£0.506)	£0.000
Service Reviews within the Corporate Core	CCS	(£0.388)	(£0.388)	£0.000
TOTAL FEB 2023 APPROVED PROPOSALS		**(£1.074)**	**(£1.052)**	**£0.022**
Integration of Housing	NSS	(£2.000)	(£2.000)	£0.000
TOTAL FEB 2024 APPROVED PROPOSALS		**(£2.000)**	**(£2.000)**	**£0.000**
TOTAL APPROVED PROPOSALS		**(£11.334)**	**(£9.303)**	**£2.031**

2025/26 Forecast Capital Outturn

16. The Capital Programme is set on a three-year rolling basis and the programme for 2025/2026 to 2027/2028 was approved by Budget Council in February 2025, as follows:

2025/26	£133.255m
2026/27	£49.223m
2027/28	£25.538m

17. At the 9 July 2025 Cabinet meeting, a further £19.360m of slippage from 2024/25 was added to the 2025/26 programme, to increase the 2025/26 Capital Programme to £152.615m, with an overall borrowing requirement of £72.570m.

Capital Programme	2025/26		
	Approved Programme £m	Slippage from 2024/25 £m	Revised Programme £m
Capital Expenditure by Theme			
Regeneration and Economic Growth	£46.640	£9.724	**£56.364**
Highways	£28.395	£3.982	**£32.377**
Open Spaces / Sports and Leisure	£0.000	£0.000	**£0.000**
Children and Young People	£9.787	£4.067	**£13.854**
Property	£2.697	£0.070	**£2.767**
Housing General Fund	£3.652	£1.490	**£5.142**
Climate Change	£0.043	£0.019	**£0.062**
ICT	£0.000	£0.000	**£0.000**
Sub-total GF In-Progress	**£91.214**	**£19.352**	**£110.566**
Approved In-Principle	£12.149	£0.000	**£12.149**
New Capital Bids	£0.370	£0.000	**£0.370**
Sub-total GF Approved In-Principle	**£12.519**	**£0.000**	**£12.519**
TOTAL GF	**£103.733**	**£19.352**	**£123.085**
TOTAL HRA	**£29.522**	**£0.008**	**£29.530**
TOTAL COUNCIL EXPENDITURE	**£133.255**	**£19.360**	**£152.615**
Financing the Capital Programme			
Prudential Borrowing	£50.296	£11.014	**£61.310**
External Funding	£49.427	£8.307	**£57.734**
Capital Receipts	£3.971	£0.006	**£3.977**
General Fund RCCO	£0.039	£0.025	**£0.064**
TOTAL GF	**£103.733**	**£19.352**	**£123.085**
Prudential Borrowing	£11.252	£0.008	**£11.260**
External Funding	£3.092	£0.000	**£3.092**
Capital Receipts	£7.848	£0.000	**£7.848**
Housing Revenue Account DRF/MRR	£7.330	£0.000	**£7.330**
TOTAL HRA	**£29.522**	**£0.008**	**£29.530**
TOTAL COUNCIL FINANCING	**£133.255**	**£19.360**	**£152.615**

18. In the budget report there was a total of £12.149m of Approved in Principle schemes, of which £7.067m have now been included within the Revised Capital Programme. There remains £5.082m of Approved in Principle schemes and progress on these will be updated in future Cabinet updates.

19. The budget report also included Approved in Principle new bids of £0.370m of which £0.050m have now been included within the Revised Capital Programme. There remains £0.320m of Approved in Principle new bids, progress on these will be updated in future Cabinet Updates.

20. As a result of in year reviews conducted, it is proposed that the 2025/26 Capital Programme is revised down by £28.054m from £152.615m to £124.561m. This is higher than the value of the capital programme delivered in previous

years but reflects the accelerated progression of projects and anticipated spend on the key regeneration schemes that are in progress this financial year.

Capital Programme Proposed changes at Q2	Revised Programme at Qtr 1 £m	Proposed In-Year Programme Updates £m	Revised Programme at Qtr 2 £m
Regeneration and Economic Growth	56.364	(£6.344)	50.020
Highways	32.377	(£13.567)	18.810
Children and Young People	13.854	(£6.369)	7.485
Property	2.767	£1.753	4.520
Open Spaces / Sports and Leisure	0.000	£4.037	4.037
Housing GF	5.142	(£2.012)	3.130
Climate Change	0.062	£1.287	1.349
ICT and Digital	0.000	£3.394	3.394
APPROVED IN PRINCIPLE TOTAL GF	12.149	(£7.067)	5.082
NEW BIDS TOTAL	0.370	(£0.050)	0.320
GF EXPENDITURE TOTAL	123.085	(£24.938)	98.147
HRA EXPENDITURE TOTAL	29.530	(£3.116)	26.414
TOTAL COUNCIL EXPENDITURE	152.615	(£28.054)	124.561

21. The overall revised programme includes:

- updates in line with Cabinet approved new schemes (£2.685m),
- proposed in-year programme updates of £5.756m to adjust for funding announcements which were received after the February 2025 Council budget meeting for which approval is sought,
- proposed reprofiling of schemes from 2025/26 into 2026/27, (£42.922m) for which approval is sought.
- Approved in principle schemes now included in the capital programme (£6.969m) for which approval is sought.
- Approved in Principle New Capital Bids now included in the capital programme (£0.050m) for which approval is sought.

22. The majority of the programme increase relates to Children and Young People – an increase of £8.017m to reflect the government's (Department for Education) grant funded Basic and High Need Capital allocations and the School Condition allocation.

23. The proposed reprofiling of £42.911m is to take account of revised best forecasts of planned timeframes for expenditure to occur over the life of the approved Capital Programme.

- Regeneration: the major regeneration programmes the Council is currently overseeing in Radcliffe, Bury and Prestwich will continue and complete towards the end of 2026-27, taking into consideration unforeseen delays related to contractual allocations and amendments as well as adverse weather.
- Highways: the majority of GMCA supported Active travel and Streets for All schemes will continue after the development phases are completed and TfGM agrees the proposed schemes; the pre-approved allocations will be confirmed as slippage toward the year-end, to correspond with the GMCA approvals as they are received
- CYP: the schools' modernisation, basic need and high needs schemes are to continue the major projects in the programme during 2026-27, with commitments already secured for the Star Academy, Millwood extension and the PRU re-allocation

24. The reduction of the proposed General Fund Capital Programme to £92.745m from the previously reported £123.085m at quarter 1 reduces the in-year borrowing requirement by £3.655m, from £59.412m at quarter 1 to £55.757m.

25. These adjustments will be used to update the Council's Medium-Term Financial Strategy. The need to borrow less than originally forecast will have an impact on future budget planning.

26. The proposed changes can be seen on the table at Appendix A.

27. This revised capital programme will be used to monitor performance during 2025/26.

28. The table below shows expenditure of £34.879m (28%) of the revised programme of £124.561m has been expended at 30 September 2025. Although the forecast at Quarter 2 shows an underspend of £11.165m against the revised budget, budget managers have indicated that work is underway to establish the schemes that can be progressed by year end, some slippage at year end is a normal feature of the capital programme and a final figure will be established and reported to Cabinet at the Outturn stage of the financial year.

29. The figures set out in the table represent the project managers' best forecast of expenditure to be achieved by the end of the financial year.

Capital Programme at Q2	2025/26	In-Year Performance			
Capital Expenditure by Theme	Revised Programme £m	Actual Spend at 30-Sept 25 £m	Actual Spend at 30-Sept 25 %	Forecast Spend for Year at Quarter 2 £m	Forecast (Under) / Over Spend £m

Regeneration and Economic Growth	£50.020	£20.509	41%	£50.020	£0.000
Highways	£18.810	£4.946	26%	£18.777	(£0.033)
Children and Young People	£7.485	£2.305	31%	£7.344	(£0.141)
Property	£4.520	£1.844	41%	£2.898	(£1.622)
Open Spaces / Sports and Leisure	£4.037	£0.934	23%	£1.650	(£2.387)
Housing GF	£3.130	£0.572	18%	£3.064	(£0.066)
Climate Change	£1.349	£0.016	1%	£0.040	(£1.309)
ICT and Digital	£3.394	£0.891	26%	£3.161	(£0.233)
SUBTOTAL GF IN PROGRESS	£92.745	£32.017	35%	£86.955	(£5.790)
SUBTOTAL HRA EXPENDITURE TOTAL	£26.414	£2.862	11%	£26.414	£0.000
TOTAL Approved by COUNCIL EXPENDITURE	£119.159	£34.879	29%	£113.368	(£5.790)
Capital Expenditure Approved in Principle					
NEW BIDS TOTAL	£0.320	£0.000	0%	£0.000	(£0.320)
APPROVED IN PRINCIPLE TOTAL GF	£5.082	£0.000	0%	£0.027	(£5.055)
SUBTOTAL GF APPROVED IN PRINCIPLE	£5.402	£0.000	0%	£0.027	(£5.375)
TOTAL COUNCIL EXPENDITURE	£124.561	£34.879	28%	£113.395	(£11.165)

Financing the Capital Programme					
Prudential Borrowing	£55.758			£47.439	(£8.319)
External Funding	£36.191			£34.640	(£1.551)
Capital Receipts	£6.109			£4.828	(£1.281)
General Fund RCCO	£0.089			£0.075	(£0.014)
SUBTOTAL GF FINANCING	£98.147			£86.982	(£11.166)
Prudential Borrowing HRA	£10.044			£10.044	£0.000
External Funding /Capital Receipts HRA	£3.092			£3.092	£0.000
Capital Receipts HRA	£5.948			£5.948	£0.000
Housing Revenue Account DRF/MRR	£7.330			£7.330	£0.000
TOTAL FINANCING	£124.561			£113.395	(£11.166)

30. During Quarter 2 a review of the capital schemes has being undertaken to align them to corporate priorities and capacity and where necessary, to rephase schemes into future years of the Capital Programme to match the anticipated timing of spend.

31. The nature of capital expenditure, dependent of many factors outside Council's control, cumulated with several large, complex schemes in the programme will necessitate further scrutiny on the level of spend that can be achieved during the current year, with further revisions expected by year-end.

32. The Council's Finance Team will continue to meet with project managers to establish expected spending for the remainder of the year.

33. Any additional amendments will be presented to Cabinet for approval in a future report and any impact of current year's achieved versus forecasted expenditure will be reflected in future years' programmes.

Prudential Indicators

34. The affordability, sustainability and prudence of the capital programme is measured through Council's Prudential Indicators (PI). The quarter two forecasts show that we remain without our prescribed limits.

2025/26 Collection Fund Forecast

35. The increasing prominence of council tax and business rates funding council services means that the collection fund is closely monitored on an ongoing basis. The current forecast position on the collection fund is an in-year surplus of £0.502m, with a residual surplus brought forward from 2024/25 of £0.684m. (This is the difference between the statutory estimated deficit as at 15 January 2024 and the outturn position.) This brings the overall forecast to a surplus of £1.186m. The Council's share of the surplus is £1.186m and Greater Manchester Combined Authority's share is £0.083m (for police and fire and rescue services).

36. The proportionate shares for Business Rates and Council Tax mean that Greater Manchester Combined Authority have a 1% share of Business Rates and a 16% share of Council Tax, whereas the Council have a 99% share of the Business Rates and 84% share of Council Tax

37. The main movements during the year which are resulting in a forecast surplus position of £1.186m (Bury share £1.103m) are shown below.

2025/26 Surplus/(Deficit) on Collection Fund	**Council Tax**	**NNDR**	**TOTAL**
	£m	**£m**	**£m**
2024/25 Surplus/(Deficit) Balance b/f	**£0.918**	**(£0.233)**	**£0.684**
2025/26			
Income	£142.709	£52.250	**£194.959**
Contributions towards Previous Year's Deficit:			
Bury MBC	£0.000	£0.268	**£0.268**
Police and Crime Commissioner	£0.000		**£0.000**
General Mayoral - Fire and Rescue Service	£0.000	£0.003	**£0.003**
Total Income	**£142.709**	**£52.521**	**£195.230**
Precepts and Demands on Collection Fund:			
Bury MBC	(£118.296)	(£49.770)	**(£168.065)**
Police and Crime Commissioner	(£15.866)		**(£15.866)**
General Mayoral - Fire and Rescue Service	(£7.569)	(£0.500)	**(£8.069)**
Disregards: Renewable Energy		£0.000	**£0.000**
Cost of Collection		(£0.235)	**(£0.235)**
Transitional Protection Payments		£0.335	**£0.335**
Impairment of Debts/Appeals:			
Write-offs of Uncollectable Amounts	(£0.002)	£0.000	**(£0.002)**
(Increase)/Decrease in the Allowance for Impairment of Arrears	(£0.167)	£0.570	**£0.403**

(Increase)/Decrease in the Allowance for Impairment of Appeals		(£1.971)	**(£1.971)**
Contributions towards Previous Year's Surplus:			
Bury MBC	(£1.054)	£0.000	**(£1.054)**
Police and Crime Commissioner	(£0.141)		**(£0.141)**
General Mayoral - Fire and Rescue Service	(£0.062)	£0.000	**(£0.062)**
Total Expenditure	**(£143.156)**	**(£51.572)**	**(£194.728)**
2025-26 In-Year Surplus/(Deficit)	**(£0.447)**	**£0.949**	**£0.502**
Surplus/(Deficit) as at 31.12.2025	**£0.470**	**£0.715**	**£1.186**

Share of the 2025/26 Surplus/(Deficit)	**Council Tax £m**	**NNDR £m**	**TOTAL £m**
Bury MBC	£0.395	£0.708	**£1.103**
Police and Crime Commissioner	£0.053		**£0.053**
General Mayoral - Fire and Rescue Service	£0.023	£0.007	**£0.030**
Surplus/(Deficit) as at 31.03.2025	**£0.470**	**£0.715**	**£1.186**

38. The prior year outturn position was less than the forecast and as such this has had an impact on the in-year surplus figure, reducing it by £0.302m.

39. Work is ongoing to reduce arrears for both Council Tax and Business Rates which will result in reduced requirements for allowance for impairment of debt.

40. Alongside improving collection of arrears, the aim is to improve the collection rate for in year debt. The trend of collection rates over the past 8 years can be seen below. It is important to note that collection was impacted during and in the period after the COVID pandemic due to the prevailing economic conditions.

Collection Rates	**Council Tax %**	**NNDR %**
2025/26 Target collection rate	97.50	97.00
2024/25	95.59	96.55
2023/24	95.25	93.88
2022/23	94.99	92.73
2021/22	95.77	93.73
2020/21	96.01	87.63
2019/20	96.39	95.37
2018/19	96.49	96.23
2017/18	96.62	96.04

41. Both the reducing arrears and improved forecast collection in year have resulted in a reduction in the required contribution to the allowance for impairment.

Housing Revenue Account Position

42. The HRA is forecasting to overspend by £1.092m as at Quarter 2, an increase of £0.252m from the quarter 1 reported position. This variance to budget

relates mainly to restructure costs increased repair costs, reduced service charge income and reduced anticipated interest on balances and will be subject to further review throughout the year. The table below demonstrates the variances.

HRA INCOME AND EXPENDITURE STATEMENT	2025/26 Original Budget	2025/26 Forecast Outturn	Variance
	£m	£m	£m
INCOME			
Dwelling Rents	(£36.731)	(£36.856)	(£0.125)
Non-dwelling Rents	(£0.209)	(£0.195)	£0.014
Other Charges for Services and Facilities	(£1.276)	(£1.067)	£0.208
Contributions Towards Expenditure	(£0.100)	(£0.008)	£0.093
Total Income	**(£38.316)**	**(£38.126)**	**£0.190**
EXPENDITURE			
Repairs and Maintenance	£8.648	£9.269	£0.621
Supervision and Management	£11.921	£12.002	£0.081
Special Services	£1.444	£1.443	(£0.001)
Rents, Rates, Taxes, and Other Charges	£0.200	£0.200	£0.000
Depreciation of Non-Current Assets	£7.330	£7.330	£0.000
Debt Management Expenses	£0.045	£0.045	£0.000
Movement in Provision for Bad Debts	£0.584	£0.584	£0.000
Total Expenditure	**£30.171**	**£30.873**	**£0.702**
HRA Services' Share of Corporate and Democratic Core	£0.400	£0.400	£0.000
Net Income or Expenditure of HRA Services	**(£7.745)**	**(£6.853)**	**£0.891**
Interest Payable and Similar Charges	£4.695	£4.695	£0.000
Interest and investment income	(£0.950)	(£0.750)	£0.200
(Surplus) or Deficit for the Year on HRA Services	**(£3.999)**	**(£2.908)**	**£1.092**

APPROPRIATIONS			
Reversal of Depreciation	(£7.330)	(£7.330)	£0.000
Transfer to the Major Repairs Reserve	£7.330	£7.330	£0.000
Repayment of Arranged Loans	£0.209	£0.209	£0.000
Capital Expenditure Funded by the HRA	£0.000	£0.000	£0.000
Total Appropriations	**£0.209**	**£0.209**	**£0.000**

43. The main variance of £0.621m (7.2%) relates to the Repairs and Maintenance service which includes the Housing Property Services Restructure and overspends due to use of special contractors for voids. The cost of the restructure will be factored into future years budgets from 2026/27 onwards as part of the overall 30-year HRA business plan.

44. Service charge income relating to Leaseholder Services is forecast to under-recover by £0.208m (16.3%). Further work is ongoing to determine the cause of the shortfall and any remedial actions necessary.

45. Interest and Investment Income is forecast to under achieve the income target by £0.200m (21.1%) and is likely due to both the budget being increased for 25/26 by £0.150m but also due to national and global economic factors. The situation will be monitored closely.

46. There are small offsetting variances in Supervision and Management and Special Services under £0.100m.

47. The HRA Capital Programme original budget for 2025/26 is £29.530m as shown in the table below, there is proposed re-phasing of £3.116m into 2026/26 leaving a proposed revised capital programme of £26.414m against which performance will be measured.

48. Negotiations are underway with developers in relation to the HRA New Build project. It is planned to purchase 10 properties subject to build completion. At present 2 properties are in progress however we do not have a completion date at present.

49. There is proposed rephasing of £1.9m in relation to the new build project. This project is funded from right to buy receipts and as such, any re-profiling will not impact on the need for borrowing during 2025/26.

CAPITAL PROGRAMME	2025/26 Original Budget	Proposed Re-Phasing to 2026/27	Proposed Revised Programme	2025/26 Forecast Outturn	Variance
	£m	£m	£m	£m	£m
CAPITAL EXPENDITURE					
Major Works & Imps	£26.530	(£1.216)	£25.314	£25.314	£0.000
Other Capital Spend	£0.000	£0.000	£0.000	£0.000	£0.000
New Build Development Costs	£3.000	(£1.900)	£1.100	£1.100	£0.000
Demolition Costs	£0.000	£0.000	£0.000	£0.000	£0.000
Other Fixed Assets	£0.000	£0.000	£0.000	£0.000	£0.000
Total Capital Expenditure	**£29.530**	**(£3.116)**	**£26.414**	**£26.414**	**£0.000**
CAPITAL FINANCING					
Prudential Borrowing	(£11.260)	£1.216	(£10.044)	-£10.04	£0.000
External Funding	(£3.092)	£0.000	(£3.092)	-£3.09	£0.000
Capital Receipts	(£7.848)	£1.900	(£5.948)	-£5.95	£0.000
HRA Direct Revenue Financing	£0.000	£0.000	£0.000	£0.00	£0.000
HRA Major Repairs Reserve	(£7.330)	£0.000	(£7.330)	-£7.33	£0.000
Total Capital Financing	**(£29.530)**	**£3.116**	**(£26.414)**	**(£26.414)**	**£0.000**
Total Capital Programme	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£0.000**

50. The HRA Reserve movements are detailed in the table below.

MOVEMENT on the HRA RESERVE	2025/26 Original Budget	2025/26 Forecast Outturn	Variance
	£m	£m	£m
Balance on the HRA at the End of the Previous Reporting Period	**(£15.867)**	**(£15.867)**	**£0.000**
(Surplus) or Deficit for the Year on the HRA Income and Expenditure Statement	(£3.999)	(£2.908)	£1.092
Appropriations	£0.209	£0.209	£0.000
Net (Increase) or Decrease before Transfers to or from Reserves	**(£3.790)**	**(£2.699)**	**£1.092**
Transfers to/(from) Earmarked Reserves	£0.000	£0.000	£0.000
(Increase) or Decrease in Year on the HRA	**(£3.790)**	**(£2.699)**	**£1.092**
Balance on the HRA at the End of the Current Reporting Period	**(£19.657)**	**(£18.566)**	**£1.092**

Links with the Corporate Priorities:

1. Financial management is a key part of the council's overall governance and control arrangements and the close monitoring of agreed income and expenditure; revised forecasts of future budget pressures and opportunities; and regular reporting of these issues underpin the council's three clear corporate priorities as set out in the Let's Do It Strategy that will deliver financial sustainability for the Council.

Equality Impact and Considerations:

2. Under section 149 of the Equality Act 2010, the 'general duty' on public authorities is set out as follows:
   - A public authority must, in the exercise of its functions, have due regard to the need to:
     a) eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act;
     b) advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;
     c) foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

3. The public sector equality duty (specific duty) requires us to consider how we can positively contribute to the advancement of equality and good relations and demonstrate that we are paying 'due regard' in our decision making in the design of policies and in the delivery of services.

Environmental Impact and Considerations:

4. This is a finance update report as such there are no environmental

impacts associated with this report.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
The Council has insufficient funds to support its expenditure.	Regular reporting and tight budgetary control by budget holders support the Council in managing the overall financial risks and financial planning for the Council.

Legal Implications:

5. This report is an updating report to Cabinet on the financial position at the end of Quarter 2.

Financial Implications:

6. The financial implications are set out within the Report.

Appendices:

A. Capital Proposed Revised Programme table

Background papers:

The Council's Revenue Budget and Medium-Term Financial Plan 2025/26

Please include a glossary of terms, abbreviations and acronyms used in this report.

Term	Meaning
HRA	Housing Revenue Account
NNDR	National Non-Domestic Rates

Appendix A – Capital proposed Revised Programme

Capital Programme at Q2	2025/26					2026/27				2027/28	2027/28
	Revised Programme (Incl. Slippage) £m	2025/26 Cabinet Approved New Schemes £m	Proposed In-Year Programme Updates £m	Proposed Re-Phasing to 2026/27 £m	Proposed Revised Programme £m	Approved Programme £m	2025/26 Cabinet Approved New Schemes £m	Proposed Re-Phasing from 2025/26 £m	Proposed Revised Programme £m	Approved Programme £m	Approved Programme £m
Capital Expenditure by Theme											
Regeneration and Economic Growth	£56.364	£0.148	£5.167	-£11.659	**£50.020**	£3.400	£0.000	£11.659	**£15.059**	£0.000	**£0.000**
Highways	£31.174	£0.000	-£1.943	-£10.421	**£18.810**	£11.802	£0.543	£10.421	**£22.766**	£0.000	**£0.000**
Open Spaces / Sports and Leisure	£0.000	£0.000	£4.037	£0.000	**£4.037**	£0.360	£0.000	£0.000	**£0.360**	£0.000	**£0.000**
Children and Young People	£13.855	£0.000	£8.093	-£14.463	**£7.485**	£10.300	£0.000	£14.463	**£24.763**	£0.000	**£0.000**
Property	£2.767	£0.655	£1.484	-£0.387	**£4.519**	£0.000	£0.000	£0.387	**£0.387**	£0.000	**£0.000**
Housing General Fund	£5.696	£0.000	£0.202	-£2.767	**£3.131**	£2.800	£0.000	£2.767	**£5.567**	£2.500	**£2.500**
Climate Change	£0.710	£0.000	£0.639	£0.000	**£1.349**	£0.648	£0.000	£0.000	**£0.648**	£0.000	**£0.000**
ICT	£0.000	£1.882	£1.512	£0.000	**£3.394**	£1.500	£1.240	£0.000	**£2.740**	£0.000	**£0.000**
Sub-total GF In-Progress	**£110.566**	**£2.685**	**£19.191**	**-£39.697**	**£92.744**	**£30.810**	**£1.783**	**£39.697**	**£72.290**	**£2.500**	**£2.500**
Approved In-Principle	£12.149	£0.000	-£6.969	-£0.098	**£5.082**	£2.000	£0.000	£0.098	**£2.098**	£4.100	**£4.100**
New Capital Bids	£0.370	£0.000	-£0.050	£0.000	**£0.320**	£0.445	£0.000	£0.000	**£0.445**	£0.300	**£0.300**
Sub-total GF Approved In-Principle	**£12.519**	**£0.000**	**-£7.019**	**-£0.098**	**£5.402**	**£2.445**	**£0.000**	**£0.098**	**£2.543**	**£4.400**	**£4.400**
TOTAL GF	**£123.085**	**£2.685**	**£12.172**	**-£39.795**	**£98.146**	**£33.255**	**£1.783**	**£39.795**	**£74.833**	**£6.900**	**£6.900**
TOTAL HRA	**£29.530**	**£0.000**	**£0.000**	**-£3.116**	**£26.414**	**£15.858**	**£0.000**	**£3.116**	**£18.974**	**£18.638**	**£18.638**
TOTAL COUNCIL EXPENDITURE	**£152.615**	**£2.685**	**£12.172**	**-£42.911**	**£124.560**	**£49.113**	**£1.783**	**£42.911**	**£93.807**	**£25.538**	**£25.538**

Financing the Capital Programme												
Prudential Borrowing	£61.310	£0.040	£2.749	-£8.341	**£55.757**	£7.735	£0.000	£8.341	**£16.076**	£2.900	**£2.900**
External Funding	£57.734	£0.738	£9.174	-£31.455	**£36.191**	£24.020	£0.543	£31.455	**£56.018**	£2.500	**£2.500**
Capital Receipts	£3.977	£1.882	£0.249	£0.000	**£6.108**	£1.500	£1.240	£0.000	**£2.740**	£1.500	**£1.500**
General Fund RCCO	£0.064	£0.025	£0.000	£0.000	**£0.090**	£0.000	£0.000	£0.000	**£0.000**	£0.000	**£0.000**
TOTAL GF	**£123.085**	**£2.685**	**£12.172**	**-£39.796**	**£98.146**	**£33.255**	**£1.783**	**£39.796**	**£74.834**	**£6.900**	**£6.900**
Prudential Borrowing	£11.260	£0.000	£0.000	-£1.216	**£10.044**	£0.000	£0.000	£1.216	**£1.216**	£0.000	**£0.000**
External Funding	£3.092	£0.000	£0.000	£0.000	**£3.092**	£0.000	£0.000	£0.000	**£0.000**	£0.000	**£0.000**
Capital Receipts	£7.848	£0.000	£0.000	-£1.900	**£5.948**	£2.032	£0.000	£1.900	**£3.932**	£0.000	**£0.000**
Housing Revenue Account DRF/MRR	£7.330	£0.000	£0.000	£0.000	**£7.330**	£13.826	£0.000	£0.000	**£13.826**	£18.638	**£18.638**
TOTAL HRA	**£29.530**	**£0.000**	**£0.000**	**-£3.116**	**£26.414**	**£15.858**	**£0.000**	**£3.116**	**£18.974**	**£18.638**	**£18.638**
TOTAL COUNCIL FINANCING	**£152.615**	**£2.685**	**£12.172**	**-£42.912**	**£124.560**	**£49.113**	**£1.783**	**£42.912**	**£93.808**	**£25.538**	**£25.538**

Agenda Item 10

Classification:	Decision Type:
Open	Non-Key

Report to:	Cabinet	**Date:** 15 January 2026
Subject:	Procurement Future Operating Model Business Case	
Report of	Deputy Leader and Cabinet Member for Finance and Transformation	

Summary

1. The accompanying Procurement Transformation Outline business case, attached as an annex to the report, seeks Cabinet approval to invest in a comprehensive Procurement Transformation Programme that will modernise Bury Council's procurement function, strengthen financial control, and deliver significant efficiency savings.

2. Procurement accounts for c£200 million annually in third-party spend, yet current arrangements are fragmented, reactive, and expose the Council to potential financial, legal, and operational risk.

3. Recurrent investment of circa £400k is required to fund additional resource and new systems to deliver improved grip and control on 3rd Party spend, ensure compliance with regulatory requirements and also deliver a significant return on investment.

4. In addition, a one-off cost of £317k in Year 1 is needed to support systems implementation (£67k) and provide temporary "surge" capacity (£250k). This will enable rapid delivery of the programme and achieve procurement savings at pace whilst permanent posts are being recruited. This one-off investment is likely to be partially offset in 2026/27 by the timescales required to recruit to the permanent team.

Recommendation(s)

5. Approve the recurrent and one-off budget provision to mobilise the new procurement team and recruit key roles and systems to deliver the aims and objectives of the programme.

Reasons for recommendation(s)

6. The attached Business Case sets out the rationale and preferred approach for transforming procurement at Bury Council. It addresses the longstanding inefficiencies, risks, and missed opportunities in the way the Council manages its £200 million annual third-party spend on both revenue and capital procurement activity. The aim is to shift procurement from a largely reactive and

transactional function to a strategic enabler of financial savings, service outcomes, and organisational assurance.

7. The budget report considered at Cabinet in December included potential third party contract savings of £1m in 2026/27 which are predicated on the need for investment in additional procurement and contract management capacity and with the potential for further savings in 2027/28 and future years. The analysis indicates there is significant scope for efficiency savings through improved procurement planning, contract management, aggregation, and compliance.

Alternative options considered and rejected

8. Doing nothing is not considered a viable option with investment in, and transformation of, the service considered as essential for delivering **a** modern, strategic procurement function that can deliver material savings, restore control, reduce risk, and reposition procurement as a key lever in the Council's financial and service reform agenda.

Report Author and Contact Details:

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Background

9. Procurement in Bury Council was identified as a key area of opportunity in the development of the financial transformation business case and in subsequent programme work undertaken up to March 2025. As part of the early programme work, a procurement baseline assessment was undertaken assessing the level of third-party spending and the current state of the contract register. Alongside this, a high-level evaluation was undertaken of the procurement service that identified challenges but also significant areas for opportunity.

10. The conclusion was that there were very significant opportunities to transform procurement and secure efficiency savings of a scale that merited a business case, hence the development of the business case.

11. The attached business case sets out the rationale, opportunity, and proposed delivery model for transforming Bury Council's corporate procurement function and approach to drive best practice whilst securing efficiencies. It draws from a range of baseline assessments, stakeholder interviews, and other insights to define a compelling case for change. Industry benchmarking tools such as the LGA Maturity Model and the Crown Commercial Service CCIAF benchmarks are available for industry wide comparisons and can provide additional benchmarking.

12. This business case aims to secure the investment and mandate for a Procurement Transformation Programme that delivers improved control, compliance and cost savings, starting from January 2026 linked to investment in new systems and potentially going live with the new central procurement hub early in the 2026/27 financial year.

13. **CASE FOR CHANGE**

- **RESOURCE:** Procurement is currently underpowered, lacks strategic oversight, and operates with minimal capacity (under 3 FTEs). Comparable organisations procurement teams across local authority and NHS have circa 10 – 15 WTE dedicated to procurement.

- **SAVINGS OPPORTUNITIES:** Third-party spend is one of the Council's largest controllable costs. Even modest improvements (2–3.5%) could deliver £10million cumulative savings over the next 5 years, supporting financial recovery and resilience.

- **CONTRACT MANAGEMENT:** There is currently no contract management strategy, model or structure. Missed opportunity to deliver efficiencies, improve quality and cost control.

- **SYSTEMS:** Systems such as Unit4 are underutilised, with no category-level spend analysis or automated controls.

- **COMPLIANCE RISKS:** Lack of capacity to manage all contract renewals which undermines governance and value for money.

- **STATUTORY DUTIES:** The Procurement Act 2023 introduces new transparency, planning, and reporting requirements. Current processes fall short, risking non-compliance and reputational harm.

14. **PROPOSED SOLUTION**

- Create a procurement team aligned to the Councils four directorates supported by modern digital systems (Unit4/ScanMarket). This model will:

  - Increase the procurement expertise and governance while retaining service-led commissioning.

  - Improve governance controls regards contract renewals, planning and compliance with statutory obligations utilising Unit4ScanMarket systems

- Enable proactive contract management, category planning, and supplier engagement.

- Deliver a fully integrated, data-driven procurement environment aligned with Council priorities to better support directorates and our partners.

15. **RETURN ON INVESTMENT**

- **Investmen**t: Approx. £400k recurrently per annum (11 WTE staff, and Unit4 systems). One off costs of £317k to support system implementation and target the quick wins whilst recruitment is undertaken.

- **Savings**: Gross savings rising from £1.0m in Year 1 to £3.0m by Year 5, delivering a cumulative £10m benefit and a forecast £7.6m net gain over five years.

16. **ADDITIONAL BENEFITS**

- **Improved Governance & Compliance:** Full electronic visibility of spend, contracts, and suppliers; reduced legal and operational risk**.**

- **Digital Transformation:** Automation of processes, documentation, real-time analytics, and integrated procurement workflows**.**

- **Strategic Capability:** Professionalised procurement function driving category management, market engagement, and delivering against the social value agenda.

- **Cultural Change:** Enhanced commercial awareness across services, supported by training and clear accountability**.**

- **Reporting:** Launch of a Procurement Group reporting to the Finance Board ensuring delivery of programme, procurement strategy aims and objectives delivered.

- **Futureproofing:** Compliance with new legislation, alignment with national procurement standards, and readiness for collaborative opportunities**.**

Links with the Corporate Priorities:

Approval of the business case and implementation of the new operating model will mitigate risk, improve compliance and control and support financial savings and ultimately financial sustainability.

Equality Impact and Considerations:

N/A

Environmental Impact and Considerations:

N/A

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
The current risks and issues are outlined in the business case. Approval of the business case will improve compliance and control, deliver improved outcomes and support the delivery of financial savings.	

Legal Implications:

There are no direct legal implications arising from this report.

Financial Implications:

The £400k recurrent annual additional cost will be included in the budget for 2026/27 and recurrently in the Medium Term Financial Strategy. Any additional requirement for additional one-off funding, up to the £317k outlined in the report, that is not offset by the likely timelines to recruit to the permanent team in 2026/27, and therefore only incurring part-year costs, will be met from capital receipt flexibilities

Appendices:

Bury Procurement Business Case - Final

Background papers:

None.

Please include a glossary of terms, abbreviations and acronyms used in this report.

Term	Meaning

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Bury Council
Procurement Transformation
Business Case

V6 Final Issued

Dec 2025

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Bury Council

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Executive Summary

1.1 Introduction

This Outline Business Case sets out the rationale and preferred approach for transforming procurement at Bury Council. It addresses the longstanding inefficiencies, risks, and missed opportunities in the way the Council manages its £200 million annual third-party spend on revenue and capital based procurement. The aim is to shift procurement from a largely reactive and transactional function to a strategic enabler of financial savings, service outcomes, and organisational assurance.

1.2 Drivers for change

Procurement at the Council currently lacks the necessary visibility, control, and assurance to consistently deliver best value — resulting in missed opportunities and potential cost inefficiencies

Early analysis indicates significant scope for efficiency savings through improved procurement planning, contract management, aggregation, and compliance. Third-party spend is one of the Council's largest controllable costs, yet over £60m remains outside the contract register, and £36m is tied up in contracts that exceed legal time limits (note this is under review and a procurement pipeline is being developed and implemented). These gaps directly undermine financial control and present avoidable risk.

The rundown of the current central procurement function in recent years has resulted in making the current operating model fragmented and reactive, with limited corporate oversight and a lack of forward planning. Capacity constraints has meant procurement activity is often uncoordinated, driven by individual services without commercial challenge or market insight. This results in inefficiency, inconsistent outcomes, and poor value for money.

Key systems, especially Unit4, are underused. The Council lacks category-level spend analysis, automated controls, and insight into procurement performance. Decisions are not data-driven, and accountability is weak.

The Council also lacks the capability and culture to manage procurement strategically. There is low organisational awareness of rules, risks, and opportunities. Contract performance is rarely monitored, and supplier relationships are not actively managed.

Compliance failures are widespread — from retrospective ordering and direct awards to unmanaged P-card use — creating legal exposure and operational risk. Without urgent reform, the Council will continue to overspend, underperform, and fall short of new statutory duties under the Procurement Act 2023.

Transformation is essential. A modern, strategic procurement function can deliver material savings, restore control, reduce risk, and reposition procurement as a key lever in the Council's financial and service reform agenda.

1.3 Scope of the Business Case

This business case follows HM Treasury's Five Case Model and sets out:

- The **strategic case** for change, including problems with the current model and alignment with Council priorities.
- An **economic case** identifying and appraising options for reform.
- The **commercial case**, covering procurement routes, market engagement, and delivery viability.
- The **financial case**, including investment costs, savings forecasts, and return on investment.
- The **management case**, detailing how the change will be delivered, managed, and governed.

An additional section has been added to set out in more detail the proposed procurement Target Operating Model.

Together, these sections provide a comprehensive assessment of the proposal and a robust foundation for investment decisions.

1.4 Summary of the Business Case

Following an option appraisal, the preferred option is to create a new **Corporate Procurement Hub**, supported by modern digital systems and a structured capability uplift. This will professionalise procurement across the Council, introduce tighter controls and governance, and enable proactive management of commissioning, tendering, and contract performance. The focus of this business case has been developing options around strengthening corporate procurement but as part of the consultation has taken into account and opinions of commissioning and contract staff across the council whilst also trying to identify stuff that may B in scope for any major organisational change in the development of a new TOM for procurement.

Key system enhancements assessed and proposed include Proactis AP automation, Scanmarket contract and spend modules, and the Unit4 Marketplace product. Policy changes such as "No PO, No Pay" will embed financial discipline, while a refreshed staffing structure will centralise expertise and oversight.

1.5 Case for Investment

The proposal is affordable and delivers high value demonstrating that:

Strategically, there is a clear case for change. Existing arrangements do not support the Council's ambitions for efficiency, risk management, or supplier engagement.

Economically, the preferred option delivers the best value-for-money outcome. It delivers sustainable savings and builds long-term capability, avoiding short-term fixes or under-delivery.

Commercially, the proposal is deliverable through existing contracts (notably Unit4), and benefits from early market engagement and a scalable delivery model.

Financially, the programme offers strong returns. Net investment costs total approximately £716k (Year 1) which includes a one off surge of external resource from day 1 to deliver savings at pace and the aims and objectives whilst recruitment is being undertaken. From Year 2 the recurrent investment is down to £399k on the basis fully recruited. Phased gross savings will rise from £1 million to £3 million per year, delivering a cumulative five-year gross benefit of £10 million, with a forecast £7.6 million cost/benefit creating a significant ROI. Note that net savings will be dependent upon the level of addressable spend including current long term contract commitments. Additional work will be required to assess and separate revenue related procurement spend form capital programme spend. See cost/benefit summary table below.

Cost Benefits Analysis	26/27 Year 1	27/28 Year 2	28/29 Year 3	29/30 Year 4	30/31 Year 5	Total Costs
Revenue Costs						
Proposed Permanent Staff	£ 634,026	£ 634,026	£ 634,026	£ 634,026	£ 634,026	£ 3,170,130
Annual System Licenses	£ 150,000	£ 150,000	£ 150,000	£ 150,000	£ 150,000	£ 750,000
Sub Total Costs	**£ 784,026**	**£ 784,026**	**£ 784,026**	**£ 784,026**	**£ 784,026**	**£ 3,920,130**
Less Current Staff Costs	£ 384,800	£ 384,800	£ 384,800	£ 384,800	£ 384,800	£ 1,924,000
Net Revenue Variance/Cost	**£ 399,226**	**£ 399,226**	**£ 399,226**	**£ 399,226**	**£ 399,226**	**£ 1,996,130**
One Off 'Surge' Consulting	£ 250,000					£ 250,000
System Implementation Support	£ 67,500					£ 67,500
One-Off Sub Total Costs	**£ 317,500**	**£ -**	**£ -**	**£ -**	**£ -**	**£ 317,500**
Total Investment Costs	**£ 716,726**	**£ 399,226**	**£ 399,226**	**£ 399,226**	**£ 399,226**	**£ 2,313,630**
Less Procurement Savings						
Annual Gross Procurement Savings	£ 1,000,000	£ 1,500,000	£ 2,000,000	£ 2,500,000	£ 3,000,000	£ 10,000,000
Cost/Benefit Savings	**£ 283,274**	**£ 1,100,774**	**£ 1,600,774**	**£ 2,100,774**	**£ 2,600,774**	**£ 7,686,370**

Managerially, governance, programme management, and phased delivery plans are in place, with risks actively monitored and a strong delivery structure under development.

Sensitivity analysis confirms the model remains financially positive even with cost overruns or slower benefit realisation.

1.6 Next Steps

Subject to approval, next steps will include:

- Mobilisation of the new Corporate Procurement Hub during 2025/26, development of mobilisation plan and allocation of resources for system and structure implementation
- Procurement and implementation of supporting systems, including the Proactis AP automation and Scanmarket, testing and readiness for deployment from Apr-26
- Finalisation of structure and recruitment into key roles
- Phased rollout of new policy controls and staff engagement
- Design and mobilisation of the supporting transformation programme

- Governance through the Finance Board and Procurement Steering Group, with quarterly reporting

The transformation of procurement is a core part of the Council's wider financial and operational reform agenda and will play a central role in securing better outcomes and improved value for money across all services.

Strategic Case

1.7 Introduction

Procurement in Bury Council was identified as a key area of opportunity in the development of the financial transformation business case and in subsequent programme undertaken to Mar-25. As part of early programme work, a procurement baseline assessment was undertaken assessing the level of third-party spending and the current state of the contract register. Alongside this, a high-level evaluation was undertaken of the procurement service that identified challenges but also significant areas for opportunity.

The conclusion was that there were very significant opportunities to transform procurement and secure efficiency savings of a scale that merited a business case, hence the development of this document.

This business case sets out the rationale, opportunity, and proposed delivery model for transforming Bury Council's corporate procurement function and approach to drive best practice whilst securing efficiencies. It draws from a range of baseline assessments, stakeholder interviews, and other insights to define a compelling case for change. Industry benchmarking tools such as the LGA Maturity Model and the Crown Commercial Service CCIAF benchmarks are available for industry wide comparisons and can provide additional benchmarking.

This business case aims to secure the investment and mandate for a Procurement Transformation Programme that delivers improved control, compliance and cost savings, starting from Jan-26, potentially go-live from Apr-26, , subject to business case.

1.8 Scope and Context

The scope of the business case covers the existing central procurement team, currently less than 3 FTEs plus interim and other budgets – a revenue spend of £384k including on-costs which include some income from schools and rebates.

Commissioning functions existing in adult care and children's services only whilst contract management is delegated to all departments. These areas were considered in the option appraisal but the review of commissioning and contract management activities, beyond consultation does not form part of this business case.

Third party spending is a significant part of the overall spend of Bury Council in terms of both its revenue and capital budgets. It follows therefore that controlling spend and ensuring best value in the overall life cycle of commissioning, procurement activity and contract management can contribute significantly to the efficient operation of the Council.

It is clear from the baseline analysis that a significantly greater opportunity exists to drive procurement savings as it forms such a substantial part of overall council expenditure. Alongside this procurement is presently constrained by:

- The lack of capacity as a procurement function in a heavily decentralised operating model
- The level of service fragmentation leading to the lack of prioritisation of contract management, cost control and challenges with enforcing good procurement practise
- The level of organisational knowledge on contract activity and the absence of contract life cycle management
- Limited visibility of spend data and little understanding of what is driving expenditure across the Council.

More specifically, procurement at the Council is a function under serious strain in many ways, namely:

1.8.1 Structural Weaknesses

Fragmented procurement model: A small corporate team with no unified council structure or strategic control and limited capacity to affect change. Reactive in nature.

Decentralised decision-making: Leading to inconsistency, lack of accountability and bypassing of corporate policy.

1.8.2 Financial Control Failures

Capacity and systems limitations means that:

- **Poor Management Information:** Lack of regular accurate spend analysis
- **Weak Compliance:** Only 60% of spend uses Purchase Orders, many raised after purchase — severely undermining financial control.
- **Procurement Planning:** Up to £36m of contracts beyond legal time limits (at Mar-25), exposing the Council to legal, operational and financial risk and.
- **Knowledge Gaps:** £61m in third-party spend is not covered by the Contract Register — a major transparency gap.
- **Controls:** Poorly controlled P-card use, with no category-level insight — ripe for misuse and overspending.
- **Strategy:** High volume of low-value, unaggregated contracts — 35% of suppliers account for <£5k each – a recipe for inefficiency

1.8.3 System and Data Underuse

The limitations of the current financial management system and associated tools means that:

- Unit4 is underutilised, due to system limitations and configurations, missing out on digital controls for spend, analytics, contract management, and compliance.
- No category-level spend analysis, making strategic sourcing and aggregation impossible.
- No clear pipeline or procurement planning – entirely reactive, not strategic.

1.8.4 Compliance and Risk

- **Widespread non-compliance** with procurement rules, creating legal exposure.

- **Retrospective ordering and direct awards:** bypassing fair competition and fuelling inefficiency and poor value.
- **Resistance to market testing:** preference for known suppliers over fair, open procurement, or in many cases failure to re-procure at all.
- **Supplier Management:** Lack of supplier vetting and poor contract oversight raise risks around safeguarding, fraud, and value for money.

1.8.5 Capability and Culture Deficit

- Low awareness of procurement rules and best practice across departments.
- Misunderstood role of procurement – seen as a blocker, not an enabler.
- Poor contract and supplier management – performance not tracked, KPIs not enforced.
- Lack of accurate digital dashboards, insight, or reporting — decisions are not data-driven.

1.8.6 Strategic Drift

- No clear Council-wide procurement strategy aligned to policy, budget, or service goals.
- Missed opportunities to leverage frameworks, collaborate with other councils, or drive innovation and sustainability.
- Not fully prepared for the new requirements of the Procurement Act 2023, including contract procurement planning and monitoring, transparency, social value, and reporting duties.

In summary, Procurement is not fit for purpose in its current state. It is fragmented, opaque, weakly controlled, poorly understood, and vulnerable to risk. This is not just a missed opportunity — it's an active liability.

1.9 Strategic Drivers

There is a pressing need to move from a risk-laden, reactive model to a proactive, strategic procurement function. The Council's procurement transformation must be driven by a convergence of urgent strategic imperatives:

1.9.1 Financial Recovery and Control

With third-party spend forming a major proportion of both revenue and capital budgets, strengthening procurement is essential to restore financial control, eliminate inefficiencies, and deliver recurring savings. Effective procurement is a direct lever for improving the Council's financial resilience.

1.9.2 Statutory and Regulatory Change

The introduction of the **Procurement Act 2023** and the ongoing requirements of **PCR 2015** demand greater transparency, planning, competition, and reporting. The Council must modernise its processes to ensure compliance and avoid legal and reputational risks.

1.9.3 Strategic Alignment with National Priorities

National public sector reform agendas emphasise commercial capability, efficiency, digitalisation, and delivery of social value. Bury's procurement function must evolve to align with these expectations and become a proactive partner in reform, not a passive responder.

1.9.4 Digital and Data Fundamentals

Council-wide ambitions for smarter, data-informed decision-making cannot be realised without unlocking the full capabilities of Unit4 and related tools. Procurement must be reconfigured to provide the analytics and controls required to support modern, insight-driven public service delivery.

1.9.5 Risk Management and Assurance

The current level of compliance failure and operational risk, from unmanaged contracts to retrospective ordering, demands urgent intervention. A strategic procurement function will provide governance, control, and assurance across all third-party spend.

1.10 Conclusion – the case for change

Bury Council spends over £200 million annually on third-party costs — nearly half its budget. Yet procurement is fragmented, underpowered, and lacks the strategic grip needed to secure value or control. Over £60 million in spend is outside the contract register, with £36 million tied up in contracts beyond legal limits.

Poor planning, weak data, and compliance failures are exposing the Council to financial and legal risk. Even modest improvements could yield recurring gross savings of £4.0m – £7.0m per year – see next sections. Further work is required to separate out capital spending to assess the level of trust spending this gives an indicative faster of the scale of savings possible. Without investment, inefficiencies will persist and the Council will remain unprepared for the requirements of the Procurement Act 2023.

A transformed procurement function, with investment in the right systems, structure, and capacity can deliver control, compliance and savings — turning the Council's procurement capability into a strategic asset.

Economic Case

1.11 Purpose of the Economic Case

The Economic Case demonstrates the rationale for investment in procurement transformation by identifying and appraising the options available to achieve best value for money. It evaluates the potential costs, benefits, risks and strategic alignment of each option, and identifies the preferred way forward that delivers the greatest overall public value.

1.12 Critical Success Factors

The following criteria are essential to the success of the procurement transformation:

- Clear strategic separation between commissioning, procurement, and contract management (though underpinned by a joint commissioning and procurement strategy, reviewed annually)
- Central visibility and reporting of spend, suppliers, and contracts
- Embedded contractual compliance with procurement legislation and policy
- Strengthened capability, central oversight and support for contract and supplier management
- Data-driven decision making through category management and spend analysis
- A structure that promotes efficiency, accountability and best value

1.13 Potential Efficiency Savings on Third-Party Spend

Bury Council currently spends approximately **£200 million annually** on third-party goods, services, and works — representing nearly half of its total budget. Based on realistic and evidenced assumptions, a transformed procurement function has the potential to deliver recurring **gross efficiency savings in the range of £4.0 million to £7.0 million per year**. This equates to a modest **2%–3.5%** saving on total third-party spend, in line with benchmarks from comparable public sector transformation programmes. Consideration needs to be given to segmenting capital and revenue savings as part of future spend analysis.

Net savings will be dependent upon the level of addressable spend including current long term contract commitments. Lack of available data at this stage has meant net savings is not calculated. Additional work will be required to assess and separate revenue related procurement spend from capital programme spend.

These savings will be achieved through a combination of targeted interventions across the procurement lifecycle, including:

1. **Contract Compliance** - Reducing financial and legal risk by ensuring all contracts are re-tendered or extended within legal timeframes.
2. **Contract Renegotiation** - Reviewing live contracts to secure better value through improved pricing, performance guarantees, or extended terms.

3. **Contract Aggregation** - Consolidating low-value, fragmented contracts into larger, strategically sourced arrangements that attract greater discounts.
4. **Use of Catalogues and Controls** - Reducing discretionary spend and limiting uncontrolled purchasing by promoting catalogue-based procurement and reducing procurement card use.
5. **Better Commissioning and Service Design** - Driving improved outcomes and efficiency through smarter commissioning, demand management, early market engagement, and stronger competition.
6. **Enhanced Contract Management** - Focusing on in-contract cost control, supplier performance, and outcome delivery to maximise the value of every pound spent.
7. **Category Management** - Developing specialist knowledge to improve commercial insight, shape markets, and negotiate better deals for high-impact spend areas.
8. **Stronger Procurement Strategy** - Raising the profile and influence of procurement within the organisation to support financial recovery and long-term reform.
9. **Cultural Change and Training** - Building capability and shared ownership of procurement outcomes across departments through learning and engagement.
10. **Data-Driven Decision Making** - Using real-time spend, supplier, and contract data to identify inefficiencies, assess risk, and target areas for improvement.

Together, these measures represent a structured and credible route to delivering sustained efficiency and improved value for money, while also strengthening compliance, control, and commercial maturity.

1.14 Options Considered

1. **Do Nothing** – Maintain the current fragmented model; no change to structures, systems, or governance.
2. **Invest in Systems Only** – Deploy Unit4 Contract Management and Spend Analytics tools (Scanmarket), but no structural reform.
3. **Central Procurement Hub** – Introduce a hybrid model with commissioning and contract management remaining in services, supported by a strengthened Corporate Procurement function and systems responsible for sourcing, compliance, frameworks, category management, and analytics.
4. **Fully Centralised Model** – All procurement activity, including sourcing, contract, and supplier management, delivered by a single corporate team with centralised commissioning.

1.15 Evaluation of Options

Each option has been evaluated in consultation with stakeholders and assessed against the Council's strategic objectives, as well as its current level of commercial maturity. Via the Commercial Continuous Improvement Assessment Framework (CCIAF) was used to inform the evaluation, highlighting the gaps in governance,

capability, systems, and assurance that each option would address to a greater or lesser extent. The options were also considered in terms of their potential to shift the organisation from a largely "Developing" or "Practising" maturity level across key themes, towards "Leading" in areas such as governance, contract management, and category planning. Note this is a high level assessment and going forward the Council may wish to conduct an in-depth maturity assessment against this model

Option 1: Do Nothing

Maintaining the current fragmented procurement arrangements would leave the Council exposed to legal, operational, and financial risks. The Council would remain at the lower end of commercial maturity, with continued compliance failures, data gaps, and poor strategic oversight. Although this option avoids change management and investment, it reinforces a reactive, low-value model that is no longer tenable.

Pros:	Cons:
• Minimal disruption, no change management required • No investment required	• Ongoing compliance failures and inefficiencies • No capability or capacity improvements • No strategic control or visibility • High risk and missed financial savings

This is a baseline option only and is not viable given statutory duties under the Procurement Act 2023 and the scale of identified risks.

Option 2: Systems Only

This option upgrades procurement systems (e.g. Unit4 Contract Management and Spend Analytics) but retains existing structures and processes. It improves visibility and control at a technical level but lacks the organisational capacity, accountability, or behavioural shift required to use these tools effectively. Maturity would improve modestly in the areas of data and systems, but structural fragmentation would remain a barrier to strategic impact.

Pros:	Cons:
• Improved system controls and compliance, reporting information • Better spend and contract data visibility • Lower implementation complexity	• No capacity or governance improvements • Limited ability to act on data or compliance challenges • Modest and uncertain savings

This option offers a partial solution, enabling better reporting but not empowering the organisation to act on it.

Option 3: Central Procurement Hub

This hybrid model introduces a centralised procurement function while retaining service-led commissioning. It enables the Council to achieve "Leading" maturity in

governance, category management, and compliance by building capability, embedding consistent standards, and leveraging system improvements. It supports strategic sourcing, spend control, and contract oversight while retaining service input and responsiveness.

Pros:	Cons:
• Strong balance of service ownership and corporate control • Builds platform for driving procurement savings and compliance • Fully supports digital transformation, capability growth and step change • Major uplift in contract and supplier management through new systems and category management	• Requires upfront investment, capacity building and cultural change • Requires some structural change and alignment of resources currently outside of procurement function

This is the preferred and most deliverable model, offering a practical but ambitious route to commercial maturity and savings.

Option 4: Fully Centralised Procurement Function

This model consolidates all procurement and commissioning into a single central team, including control of strategic contract management . Whilst it maximises control and policy compliance, it risks alienating service teams and creating operational bottlenecks. It may deliver a high level of standardisation and control, but the maturity gains in stakeholder engagement and commissioning may be offset by service disengagement or slow adoption.

Pros:	Cons:
• Highest consistency and compliance – all functions together and fully coordinated • Drives harmonisation and consistency of commissioning, procurement and contract management processes • Strong central control and risk mitigation	• High complexity and change management challenge • Risk of alienating or disconnecting service areas and losing responsiveness and local service knowledge • Potentially slower implementation and service impact

This option may overreach and reduce service responsiveness, making it harder to transition, transform and embed changes sustainably.

1.16 Options Appraisal Summary

Each option was assessed against strategic alignment, deliverability, compliance, data capability, and savings potential. The appraisal findings are summarised below, defined as Benefits (Low/Medium/High):

Criteria	Option 1: Do Nothing	Option 2: Systems Only	Option 3: Central Hub	Option 4: Fully Centralised
Strategic Alignment	Low	Low	Medium	Medium
System Integration	Low	Medium	High	High
Governance & Compliance	Low	Medium	High	Medium
Contract Lifecycle Oversight	Low	Low	High	High
Spend Reporting & Analytics	Low	Medium	High	High
Category Management	Low	Low	High	High
Cultural Change / Skills	Low	Low	High	Medium
Financial Savings Potential	None	Low	High	High

1.17 Preferred Option

The preferred option is Option 3: Central Procurement Hub though a case can be made for Option 4 if the Council considers the complex nature of delivering this option can be successfully done .

Option 3 model delivers the strongest balance between strategic control and service-level ownership. It builds a dedicated corporate procurement function to provide policy, governance, analytics, and commercial expertise, while allowing services to retain accountability for commissioning and contract delivery. It enables full integration with Unit4 systems, supports cultural and capability development, and is the only option capable of delivering the estimated gross annual savings – subject to further analysis of capital and revenue spend and in-scope addressable spend. This model also positions the Council to fully comply with the Procurement Act 2023 and deliver long-term value.

1.18 Benefits and Risks

Key Benefits:

- Substantial efficiency savings on third-party spend
- Improved compliance and risk reduction
- Full visibility and control over contract and supplier activity
- Stronger support for service-level commissioning
- Better use of data and systems to drive decision-making

Key Risks:

- Delivery complexity and transition challenges
- Change management and stakeholder engagement requirements
- Need for investment in capacity, training, and system configuration

1.19 Conclusion

Procurement transformation is a strategic necessity for Bury Council. With nearly £200 million in annual third-party spend, even modest improvements will generate significant financial and operational benefits. Option 3 delivers the best public value, balancing ambition with deliverability, and enabling the Council to meet its statutory duties, recover control, and improve outcomes through a modern, efficient procurement function.

Target Operating Model

1.20 Introduction to Preferred Option

Based upon the preferred option of a Corporate Procurement Hub

1.21 Vision

"To design, source and deliver services that meet local needs through a modern, efficient and compliant procurement function that drives best value, actively manages contracts and suppliers –supports active contract management, and uses technology and data to ensure full visibility, accountability, and continuous improvement."

This means:

- Designing and developing services around outcomes and community priorities
- Procuring efficiently, transparently, and in line with legislation
- Leveraging integrated technology and AI to reduce manual effort and automate transactional processes
- Supporting services to manage contracts and suppliers proactively to drive quality and performance
- Using real-time data to monitor spend, assess risk, and hold budget holders to account
- Aggregating contracts and standardising demand to unlock economies of scale
- Enabling early market engagement and fair, open competition
- Fully complying with the Procurement Act 2023 and PCR 2015
- Commercialisation offer to schools and others

1.22 Design Principles

The values and priorities underpinning the model is proposed as below:

1. Outcome-Focused and Locally Responsive - Procurement supports the design of services around clear local needs and outcomes, enabling early and meaningful engagement with the market.

2. Efficient, Digital and Value-Driven - Automation and AI are embedded across processes to minimise waste, accelerate procurement cycles, and deliver the best value from every pound spent.

3. Compliant and Accountable Activities fully align with the Procurement Act 2023 and 2015 PCR. Real-time reporting and system controls ensure transparency and hold services accountable for compliant spend.

4. Data-Driven and Insight-Led - Contract, spend and supplier data is actively used to inform strategy, manage risk, and drive continuous improvement across the organisation.

5. Integrated Contract Lifecycle Management - Contract management sits within services, with the corporate centre providing standards, tools, and support. Digital systems enable full lifecycle visibility and planning.

6. Supplier-Enabled and Market-Engaged - Suppliers are digitally enabled, fairly treated, and monitored for performance. Processes are simple and inclusive to support SME participation.

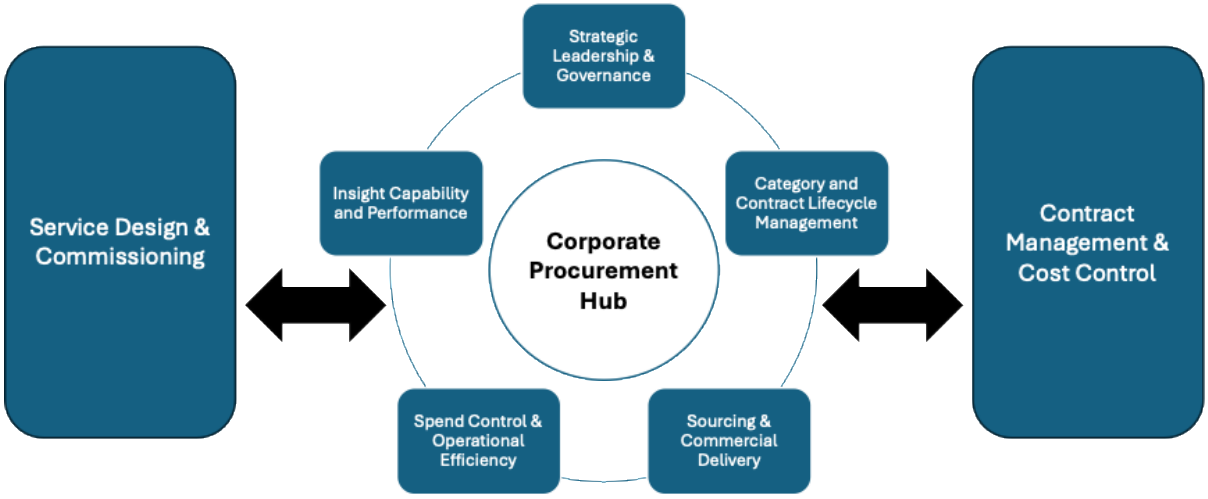
7. Digitally Enabled from End to End - A single digital workflow from commissioning to payment, with integrated platforms, automation, and dashboards at every step.

8. Skilled, Embedded and Connected Teams - Category management is aligned to services, supported by a strong corporate centre that acts as a procurement hub—setting policy, building capability, enabling systems, and ensuring consistency across the organisation.

9. Income Generation - bringing in commercial revenues to support service development and budget contribution

1.23 Target Operating Model

The outline of the structure, capabilities, and key functions that define the future TOM are shown in the diagram below and following descriptions.



1.24 Functional Breakdown

The key functions of the target operating model are set our below

1.24.1 Service Design and Commissioning

This function is responsible for defining the **needs, outcomes, and delivery models** for services to be procured. It ensures that procurement is grounded in a clear

understanding of what is required, why it is needed, and how it aligns with local priorities and user needs.

Key responsibilities include:

- Shaping the market and engaging potential suppliers early
- Co-designing services with stakeholders and service users
- Developing outcome-focused specifications
- Aligning commissioning plans with budget, policy, and delivery strategy
- Ensuring clarity on roles, responsibilities, and performance expectations before procurement begins

This function will be service led, with close collaboration from procurement to ensure commercial viability and compliance from the outset.

1.24.2 Contract Management

Contract Management ensures that contracts, once awarded, are **actively monitored and managed** to drive performance, mitigate risk, and secure value throughout the contract lifecycle.

Key responsibilities include:

- Managing supplier relationships and ensuring delivery against KPIs and service outcomes
- Monitoring cost, performance, and compliance
- Conducting regular reviews, audits, and improvement planning
- Preparing for renewals or re-procurement with appropriate notice and insight
- Supporting issue resolution, dispute management, and contract variations

While day-to-day contract management will be delivered within services, though it must be supported by corporate governance, clear policies, and regular reporting to ensure consistency and assurance.

1.24.3 Corporate Procurement Hub

The Corporate Procurement Hub provides the strategic, commercial, and operational leadership necessary to deliver consistent, value-driven procurement across the Council. It acts as the centre of expertise, policy, and governance, supporting services while enforcing standards and enabling savings. The Hub does not replace service commissioning or contract ownership but strengthens the overall procurement environment and commercial maturity.

Key responsibilities include:

- Setting corporate procurement policy, strategy, and governance
- Leading category planning, market engagement, and supplier relationships
- Providing expert support on tendering, commercial negotiations, and compliance
- Managing procurement systems, analytics, and reporting
- Supporting services with procurement planning and contract lifecycle oversight
- Enabling a culture of commercial awareness and continuous improvement

To deliver the benefits of procurement transformation, five core functional areas have been defined as part of the Corporate Procurement Hub – a fuller description is attached as Annex B.

1. **Strategic Leadership and Governance** - Sets the strategic direction for procurement, enforces policy and compliance, embeds social value and ethical sourcing, and provides assurance to senior leadership.
2. **Category and Contract Lifecycle Management** - Provides structured category management and ensures contracts are actively managed throughout their lifecycle, from planning through to renewal or exit.
3. **Sourcing and Commercial Delivery** - Delivers compliant, competitive procurement processes, supports services in specification development, and drives value through commercial negotiation and innovation.
4. **Spend Control and Operational Efficiency** - Improves transparency and financial control through systems, data, and automation — enabling spend analysis, contract visibility, and procurement planning.
5. **Insight, Capability and Performance** - Builds procurement capacity and data maturity across the organisation through training, reporting, and impact evaluation, while ensuring accountability and transparency.

The Hub ensures that procurement is aligned with council-wide priorities, compliant with legislation, and capable of delivering measurable financial and service outcomes.

Commercial Case

1.25 Building Capacity for Delivery

Realising the full benefits of procurement system modernisation at the Council requires investment not just in technology, but in the underlying capacity to deliver and sustain change. The following components will be essential:

Policy

New and updated procurement policies — notably around "No PO, No Pay", catalogue-based purchasing, contract compliance and spend governance — will underpin system functionality and must be adopted corporately. These policies will be critical for automation to deliver measurable value.

Systems

Three system solutions have been identified as strategic enablers:

- The **Unit4 ERP Marketplace** module, to manage purchasing through controlled catalogues.
- **Proactis AP Automation**, to remove manual invoice handling, reduce error, and streamline exception handling.
- **Scanmarket Contract and Spend Analytics**, to strengthen control over contracts and offer visibility across all procurement activity.

See Annex C for a more detailed assessment of these systems.

Structure

Procurement and finance teams will need to operate with clearer functional ownership — particularly across contract management, supplier onboarding, and invoice processing. This may involve reshaping roles or centralising functions where decentralisation has created inefficiencies.

1.26 Procurement and Financial Process Development

To maximise the impact of new systems and deliver sustainable improvement, the Council will need to strengthen both its financial processing and its core procurement lifecycle. These are distinct but complementary areas of activity.

Financial and P2P Processes

Proactis AP Automation is focused on accounts payable modernisation. It automates invoice capture, validation, PO matching and supplier query management. However, it does not cover procurement strategy or sourcing as its benefits form part of the finance transformation programme, although its deployment is essential in creating a high performing procurement function, especially in terms of supplier engagement and management

Proactis will support:

- Invoice processing using AI and OCR
- Query Desk for exception handling
- Supplier PO Flip functionality

- Integration with Unit4 for seamless payment processing

The effectiveness of this system depends on strong upstream practices: timely PO creation, robust receipting, and catalogue-based ordering via Unit4.

Procurement Process Strengthening

End to end procurement transformation rests on three activity areas:

1. **Commissioning and Design**: Embedding service design, better pre-procurement requirements planning, early market engagement and clear commercial strategies. This activity sits with service departments.
2. **Procurement Management**: Improving governance and compliance during sourcing, evaluation and award. While ProContract supports tendering, it is not sufficient on its own. Key to this is ensuring the three core activities of commissioning procurement and contract management work as an overall end to end process. It is also therefore important that a central procurement hub is able to significantly influence commissioning and design across the service departments and has the governance and overview of contract management, setting standards and overseeing overall performance through analysis of contract spend
3. **Contract and Supplier Management**: Strengthening post-award oversight and supplier performance management. Whilst the Corporate Procurement Hub can provide the spend analytics using Scanmarket, capability must also be further developed internally, in a common way, across all service departments to develop and maintain effective contract management, best value, performance and contract compliance.

1.27 Transformation Approach

To enable this change, a three-pronged commercial strategy will be adopted:

Resources

The proposed staff structure will need to be finalised, evaluated and recruited over this financial year. Alongside this, dedicated transformation programme and subject matter expertise will be required to manage implementation, ensure business readiness, and embed changes across the organisation. This may include interim commercial, procurement or AP automation specialists as part of a procurement transformation programme.

Procurement of Systems

The preferred commercial approach is to extend the current Unit4 contract, which permits the addition of further modules. This route allows for streamlined procurement, faster mobilisation, and known commercial terms. It also ensures consistency in system integration and supplier relationship management.

Alternative procurement routes, where required, include:

- Crown Commercial Services (CCS) G-Cloud 14 and Digital Outcomes & Specialists frameworks

- Direct award or mini competition through alternative framework agreements or via The Chest open tender process.

Each route will be tested against value for money, implementation efficiency, and ability to align with Council timelines.

Programme and Change Delivery

Delivery of these systems will be phased and coordinated with the Council's Finance Transformation Programme, though it will need to dedicated programme, project and procurement advisory resource. Support will need to be procured to manage the design and delivery of the early transformation activities and to support where implementation, staff training and change management activities.

1.28 Market Engagement

Preliminary discussions have been held with all key suppliers:

- Unit4 has provided high-level costings and timelines for the Marketplace and Spend modules. This will be delivered as part of the current Finance Transformation programme.
- Proactis has demonstrated its invoice capture and PO Flip functionality and supplied indicative costings based on Bury's invoice volumes.
- Scanmarket has demonstrated its Contract Lifecycle Management and Spend Analytics Modules, alongside a supplier registration module. These products are part of the wider Unit4 service offering though would need to be separately procured.

The suppliers involved to date are existing strategic partners with existing integrations, which significantly reduces delivery risk.

1.29 Risk and Assumptions

The key commercial risks identified are:

- **Integration complexity:** While the systems are technically compatible, implementation must be carefully managed to avoid delays and ensure interoperability with the Unit4 ERP core.
- **Behavioural change:** Systems alone will not deliver benefits; enforcement of new procurement policies and sustained user engagement is essential.
- **Supplier readiness:** Timely implementation will depend on supplier resource availability and clarity of scope.
- **Cost control:** There is a risk of underestimating the professional service and change support required a spart of a transformation programme with a clear focus on securing year on year efficiencies. Clear programme planning and cost modelling and governance will mitigate this.

All risks will be managed through established project governance under the Finance Transformation Programme or Finance Board with early engagement of IT, Procurement, and Finance leadership to ensure delivery readiness.

Financial Case

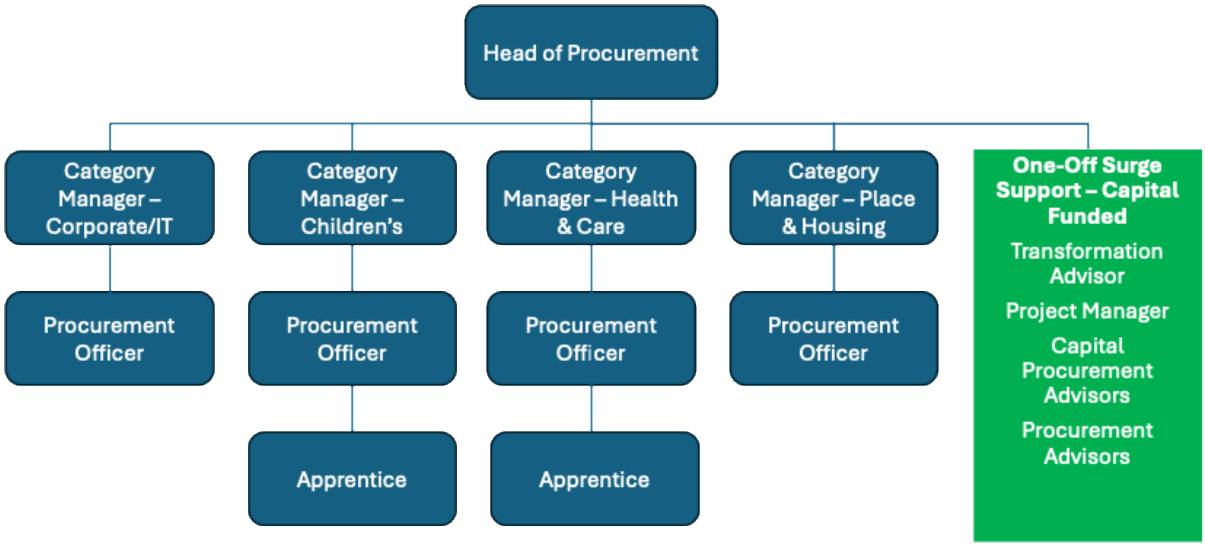
1.30 Proposed Procurement Hub – Structure

The present costs for the service include current staffing costs for the small central procurement team plus resource is in of the departments that may transfer to a corporate procurement hub as part of the establishment of category management. This will need further review but the assumption at this stage that is that at least one post can do this and that has been taken into account in the present costs.

Proposed costs are based on the assumption that full investment is made in the creation of a corporate procurement hub including permanent resources as well as shorter term one-off "Surge" resources for transformation, project management and procurement advisory resource needed for the first two years in order to drive and secure early efficiencies.

For the purposes of this business case all procurement related systems costs, bar Unit4, have been included namely contract lifecycle management, cost analysis and AP automation, accepting that the latter will deliver benefits in the finance transformation programme but is in a central part of creating a full end to end procurement service. It is assumed contract and spend analytics is procured early in the delivery process.

Proposed costs for staffing are based upon market benchmarks and the following staff structure sets out the range of functions and roles in the proposed corporate procurement hub. A full breakdown of staffing, roles and costs is shown in Annex D.



1.31 Structure: procurement grades and market benchmarking

The proposed structure is deliberately designed to align seniority, accountability and reward with both the scale of spend under management and the delivery of cashable savings at pace. Salary benchmarking has therefore been undertaken using a combination of internal peer roles within Bury Council's emerging Finance and

Commissioning structures, alongside external local-government market evidence from comparator councils.

This approach ensures that the proposed grades are credible, affordable and defensible, while also being sufficiently competitive to attract and retain scarce procurement talent in a challenging recruitment market.

1.31.1 Head of Procurement

The Head of Procurement is a pivotal leadership role within the council's financial recovery and transformation agenda. The postholder will be accountable for driving procurement savings at scale, embedding category management, strengthening contract management disciplines and delivering the benefits set out in this business case. This role carries a level of responsibility that goes well beyond traditional compliance-focused procurement leadership and instead combines strategic leadership, transformation delivery and commercial acumen.

Given this scope, the Head of Procurement role is benchmarked as at least comparable to the recently established Band B grade for Strategic Finance Leads within the new Finance structure. This reflects parity of seniority, leadership responsibility and direct impact on the council's medium-term financial position. Market evidence from other councils shows that Heads of Procurement with explicit savings and transformation accountability typically sit at this level or above, particularly where they lead multiple category teams and are expected to deliver cashable benefits quickly.

Positioning the Head of Procurement at this level is also necessary to address known recruitment challenges for senior procurement professionals, particularly those with experience of operating at pace in financially constrained local authorities.

1.31.2 Category Managers

Category Managers form the operational backbone of the new procurement model. Each role is responsible for a defined portfolio of spend (for example Corporate and IT, Children's, Health and Care, Place and Housing), developing and executing category strategies, leading high-value and complex procurements, and working directly with commissioners and budget holders to secure savings and improved outcomes.

These roles are deliberately aligned to the Strategic Commissioning Lead (SM1 grade) elsewhere in the council. This reflects the fact that Category Managers and Strategic Commissioning Leads are intended to operate as peers: jointly shaping markets, influencing demand, managing supplier performance and ensuring that commissioning and procurement strategies are fully aligned. External benchmarking indicates that councils which successfully embed category management typically place these roles at senior manager level rather than treating them as enhanced officer posts.

Aligning Category Managers to SM1 also supports effective cross-directorate working, ensuring procurement has sufficient authority and credibility to challenge specifications, drive standardisation and secure value for money.

1.31.3 Procurement Officers

Procurement Officers provide professional delivery capacity within each category, supporting tendering activity, contract management, compliance with procurement regulations and the day-to-day operation of the procurement service. In the target model, these roles are not transactional buyers but skilled professionals operating within a structured category framework.

Market benchmarking indicates that the appropriate peer group for these roles within Bury Council is Senior Finance Business Advisors and Corporate Accountants within the new Finance structure. Accordingly, Procurement Officers are aligned to Grade 12/13, reflecting comparable levels of professional judgement, technical expertise and responsibility. This alignment supports internal equity, facilitates joint working with finance colleagues and ensures Bury remains competitive in a market where qualified procurement professionals are in short supply.

1.31.4 Apprentices

Procurement apprentices are included within the model to support workforce sustainability, succession planning and skills development. These roles will be aligned to the council's established apprentice bandings and will operate within a structured development pathway, gaining exposure to regulated procurement activity while building professional capability over time.

1.31.5 Career pathways and competency framework

All roles within the target procurement structure will sit within a single procurement competency framework. This framework will define expected skills, behaviours and performance levels at each grade, providing clarity on progression from apprentice through to senior leadership roles. The framework will support consistent performance management, targeted development and talent retention, while also enabling the council to grow future procurement capability internally and reduce long-term reliance on interim or agency support.

Taken together, the proposed grading structure balances affordability with realism, aligns procurement roles with established internal peers, and reflects market expectations for modern, savings-focused procurement functions in local government. It provides a credible platform for delivering the benefits set out in this business case while strengthening the council's long-term commercial capability.

1.32 Investment Costs and savings forecasts

Investment costs and savings are based Over 5 year. Assuming it start from 2026/27. Proposed staff costs are based upon permanent and transformation contract costs plus the implementation and ongoing costs of new systems.

Savings have been estimated on the basis of an annual procurement spend of £200m. A range of 2% to 3.5% is assumed as a realistic and conservative target for savings with a median of 2.75% used as the median for this business case, delivery a potential full gross savings of £5.5m per year based on estimated revenue spend. More data analysis to assess addressable spend and the split between Capital and Revenue procurement spend is needed to assess net savings ROI. This data was not made

available at the time of this business case. All financial projections in this business case are based on estimated addressable revenue spend only. Final net savings and ROI will be confirmed through a detailed segmentation of procurement data during mobilisation.

A step up in gross revenue savings year-on-year has been used to calculate saving as follows:

Annual Gross Revenue Procurement Savings	Year 1	Year 2	Year 3	Year 4	Year 5	Total
	£1,000,000	£1,500,000	£2,000,000	£2,500,000	£3,000,000	**£10,000,000**

Annual Gross Procurement Savings is based on Revenue Spend Only and a working assumption of 50% Capital and 50% Revenue has been applied with the added assumption of an aggressive savings push in Year 1 with surge resources.

The table below shows the net investment costs and savings forecast over the five year period from 2026/27 to 2030/31. Staff costs include on-costs (top of grade).

Cost Benefits Analysis	26/27	27/28	28/29	29/30	30/31	Total Costs
	Year 1	Year 2	Year 3	Year 4	Year 5	
Revenue Costs						
Proposed Permanent Staff	£ 634,026	£ 634,026	£ 634,026	£ 634,026	£ 634,026	£ 3,170,130
Annual System Licenses	£ 150,000	£ 150,000	£ 150,000	£ 150,000	£ 150,000	£ 750,000
Sub Total Costs	**£ 784,026**	**£ 784,026**	**£ 784,026**	**£ 784,026**	**£ 784,026**	**£ 3,920,130**
Less Current Staff Costs	£ 384,800	£ 384,800	£ 384,800	£ 384,800	£ 384,800	£ 1,924,000
Net Revenue Variance/Cost	**£ 399,226**	**£ 399,226**	**£ 399,226**	**£ 399,226**	**£ 399,226**	**£ 1,996,130**
One Off 'Surge' Consulting	£ 250,000					£ 250,000
System Implementation Support	£ 67,500					£ 67,500
One-Off Sub Total Costs	**£ 317,500**	**£ -**	**£ -**	**£ -**	**£ -**	**£ 317,500**
Total Investment Costs	**£ 716,726**	**£ 399,226**	**£ 399,226**	**£ 399,226**	**£ 399,226**	**£ 2,313,630**
Less Procurement Savings						
Annual Gross Procurement Savings	£ 1,000,000	£ 1,500,000	£ 2,000,000	£ 2,500,000	£ 3,000,000	£ 10,000,000
Cost/Benefit Savings	**£ 283,274**	**£ 1,100,774**	**£ 1,600,774**	**£ 2,100,774**	**£ 2,600,774**	**£ 7,686,370**

1.33 Cost benefit analysis

The proposed procurement transformation programme involves investment in systems, staffing, and capability building to deliver sustainable improvements in third-party spend management. The total gross investment over five years, from 2026/27 to 2030/31, is £716,726 (Year 1) down to £399,226 (from Year 2 – ongoing revenue costs), reflecting system implementation, interim procurement staff whilst permanent recruitment is undertaken.

Initial investment is frontloaded, with peak expenditure in 2026/27 to support the mobilisation of core systems, notably AP automation and ScanMarket source2contract lifecycle tools. Costs stabilise in later years, reflecting ongoing operational delivery and optimisation.

Procurement savings are projected to rise steadily over the five-year period, starting at £1 million in 2026/27 and reaching £3 million annually by 2030/31. These forecasts

are based on a median savings assumption of 2.5% on a £200 million third-party spend base, assuming 50% of this spend is revenue related.

The resulting gross benefits demonstrate a strong return on investment:

- In Year 1, benefit is at 283k as a result of one-off investment.
- From Year 2 onwards, benefits significantly exceed costs, with gains rising to £2.6 million by Year 5.
- Total cumulative benefit over five years is projected at appropriately £7.6 million.

These results underline the value of sustained investment in procurement modernisation. However these benefits, including the actual net benefits, should be fully documented at the start of the delivery programme from Jan-26.

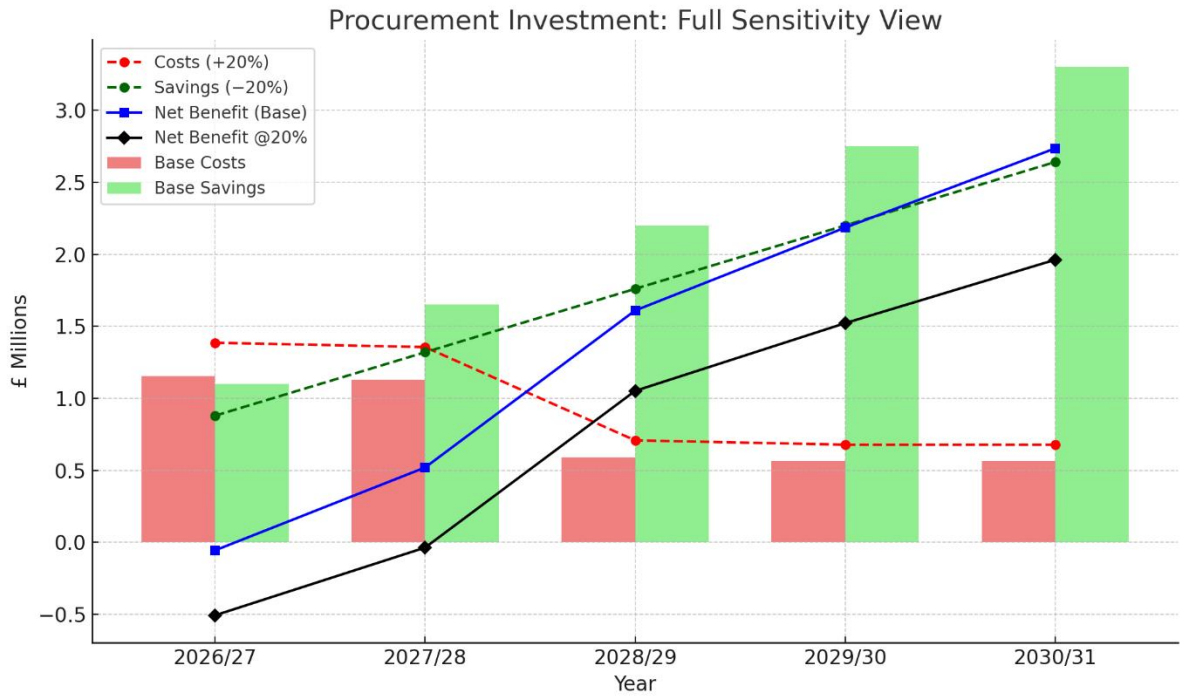
1.34 Value for Money

The analysis confirms that the proposed investment delivers a compelling and resilient financial return, supports the Council's strategic transformation aims, and addresses longstanding issues in procurement value, compliance, and efficiency. The model is scalable and adaptable to actual implementation progress, with a strong case for proceeding at pace.

The proposed investment represents strong value for money by enabling long-term operational savings, better contract management, and strategic sourcing. It also supports improved compliance with procurement legislation and policies, enables better data for decision-making, and reduces manual processing costs. The combination of automation, insight, and control provides a clear platform for procurement transformation.

1.35 Sensitivity Analysis: Financial Resilience based on gross savings/ROI

A two-way sensitivity analysis was used to test the robustness of the financial case by modelling a 20% increase in investment costs and a 20% reduction in procurement savings. This reflects potential delivery risks such as higher staffing or system integration costs, and slower realisation of benefits. The graphic below shows the impact over 5 years.



Even under these more conservative assumptions, the programme maintains a positive net benefit each year. While Year 1 delivers only a small surplus, benefits grow steadily from Year 2 onward, reaching £1.96 million in Year 5.

Over five years, the cumulative gross benefit remains strong at **£4 million**. This confirms the investment remains financially sound even in a more constrained scenario.

The analysis highlights the resilience of the procurement transformation model. With prudent cost control and effective delivery, the Council can expect a strong return while mitigating foreseeable risks.

Management Case

1.36 Introduction

This section sets out the approach that will be undertaken by the council to implement the new arrangements and to deliver the transformation programme that will secure the target efficiencies. It sets out the proposed governance to ensure that procurement efficiencies remain a high priority for the council, sets out the indicative road map to implement both the new staffing and system arrangements and also the design and delivery of a programme of transformation setting out the priorities and the project plan. The target benefits and risks to be managed and dependencies to be considered are also highlighted as part of this section.

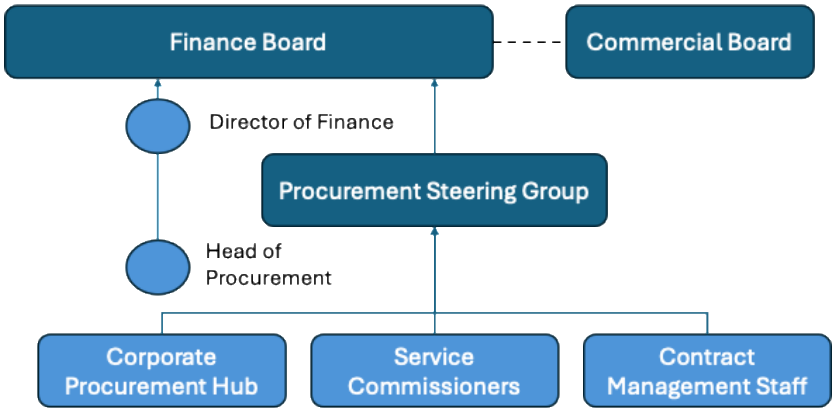
1.37 Programme Governance

The corporate procurement team currently reports through to the Director of Finance, And this arrangement is proposed to continue. However as indicated in the proposed stuff in structure the status of the head of procurement should be considered as an assistant director to indicate its importance across the organisation alongside the scale of efficiencies that will contribute to the wider council priorities.

In terms of corporate governance the Council created a series of boards in 2024 to strengthen its overall strategic governance as a council. In this regard it would make sense that all repeat procurement activity is governed and overseen by the Finance Board, with possibly some relationship to the Commercial Board on major investment programmes.

For operational governance, it is proposed to that here procurement Steering Group be established to oversee day to day procurement activity, including Management off the annual pipeline, supply and contract management and review of contract spend, all of which can be reported up to the finance board.

A diagram shown these governance arrangements is shown below.

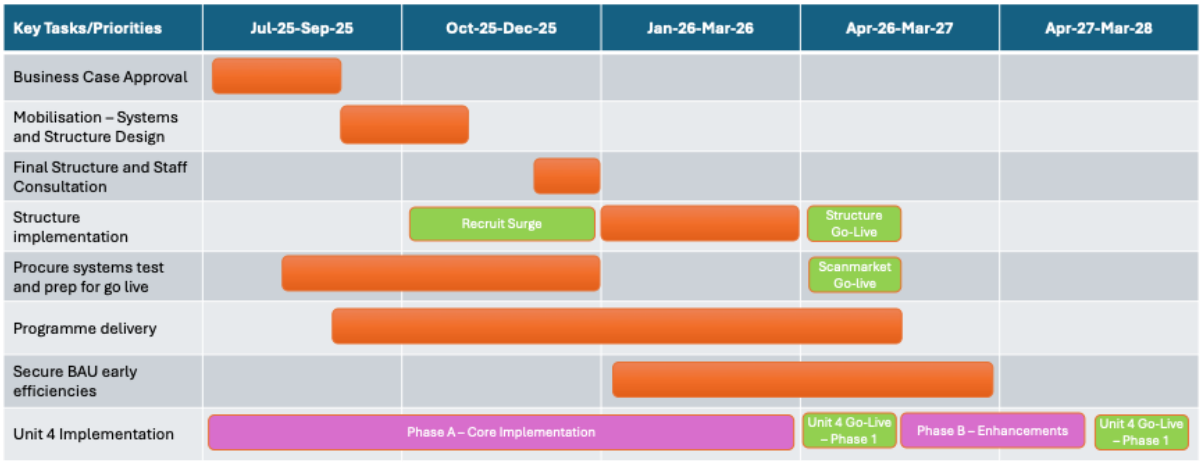


1.38 Roadmap

The council has a number of implementation pathways to deliver its procurement transformation covering the following areas:

- **Short term arrangements** - This covers the immediate opportunities in the current financial year as the council moves towards the new organisational structure for procurement and it's supporting transformation activities. A number of interim appointments have already been made which have not been included in this business case which will play a role in driving the securing of early transformation efficiencies.
- **Implementation of new Target Operating Model** - This will include the development of the proposed organisational structure, its subsequent implementation and the implementation of governance arrangements as described in this business case
- **System Implementation** - Alongside this the system is proposed in addition to the Unit4 ERP implementation will need to be procured implemented and tested including all data migration training and communication. Alongside this systems will need to be aligned to the Unit4 ERP implementation to ensure there is full harmonisation of systems.
- **Transformation Programme** - Alongside the development of the organisational structure should be a clear programme for the transformation of procurement which will take into account the planned pipeline of activity, priority targets and resource is needed to coordinate and fully implement the programme as the organisational structure is developed. It should be expected that a transformation programme would run over a one year. As the organisation builds up its capacity skills and knowledge so that transformation activities become a normal part of the new organisational structure.

The indicative road map is shown below and will be developed in full at the next stage of this work, subject to business case approval.



1.39 Project Plan

The next stage of this business case beyond its review and agreement is the development of a project plan for delivering the road map described above. This will need to take into account the delivery of the new Unit4 includes ERP modules, especially those in relation to procurement such as the marketplace and contract modules.

The project plan would also need to set out in specific detail the actions required to create the new organisational structure including job descriptions job profiles and job evaluation and beyond that the active recruitment of posts into the new structure. Alongside this it will need a specific plan to ensure that the implementation alignment and testing of new systems recommended in this business case.

The project plan is therefore not included in this business case at this stage and will be expected to be developed and delivered between Oct-25 through to implementation starting Apr-26.

1.40 Benefits Management

The procurement transformation programme will deliver significant benefits across financial, operational, and strategic dimensions, as follows:

- **Financially**, the programme is expected to deliver cumulative savings of over £10 million over five years, based on a median savings assumption of 2.75% on third-party spend. These savings will grow year-on-year and be sustained through improved sourcing, tighter contract management, and greater compliance.
- **Operationally**, the introduction of AP automation and procurement systems such as Scanmarket and Unit4 Marketplace will eliminate manual processes, reduce duplication, and enable better governance over supplier spend. This will allow teams to shift focus from transactional tasks to more strategic activity.
- **Strategically**, the establishment of a Corporate Procurement Hub will provide professional oversight across commissioning, procurement, and contract management, aligning procurement outcomes more closely with service objectives. The new structure will also support consistency, data-driven decision-making, and greater visibility of supply risks and opportunities.

Benefits will be tracked through a robust KPI framework, including PO compliance, contract register completeness, supplier rationalisation, and policy adherence. Quarterly benefit reviews will be embedded in governance through the Finance Board and Procurement Steering Group.

1.41 Risk Management

Procurement transformation presents a significant opportunity to drive savings, compliance, and strategic capability across the Council. However, it also introduces a range of delivery and operational risks that must be carefully managed to protect public value and sustain long-term improvement.

The risks span organisational, technical, behavioural, and external domains. Key risk categories include:

- **Delivery complexity**: Coordinating new systems, processes, and structures across multiple departments will require strong governance and programme leadership. Any delays or misalignment may impact benefit realisation.
- **Behavioural and cultural resistance**: Transitioning from a fragmented, reactive procurement model to a strategic, data-driven approach represents a substantial

shift. Resistance to policy enforcement, new systems, or changes in accountability could undermine outcomes.

- **Capability gaps**: While the business case includes new staffing and training, there is a risk that recruitment delays, skills shortages, or insufficient capacity limit the ability to operate the new model effectively.
- **Technology integration**: Full benefit realisation is dependent on successful implementation and integration of systems such as Scanmarket and Proactis with Unit4. Technical delays or configuration issues could disrupt operations.
- **Financial risk**: Upfront investment is required ahead of benefit realisation. Any overspend on transformation costs or delays in achieving savings could reduce the return on investment.
- **External factors**: Inflation, supplier market volatility, and regulatory changes could impact both costs and procurement outcomes. These external risks must be continuously monitored and mitigated.

To provide additional assurance, a structured risk register has been developed and is summarised in the Annex E.

1.42 Monitoring & Evaluation

A robust Monitoring and Evaluation (M&E) framework will be established to track the effectiveness and impact of the procurement transformation programme. This will ensure that intended outcomes are delivered, risks are actively managed, and lessons are continuously fed into ongoing improvement.

As part of developing a framework the Council should appropriately adopt the CCIAF and/or the LGA National Procurement Strategy Maturity Model to give structured and benchmarked frameworks to track progress in procurement capability and commercial performance. By embedding these models, organisations can baseline their current maturity levels across key themes such as strategy, contract management, and supplier engagement, and then use periodic self-assessments to measure improvements over time. This supports evidence-based decision-making and demonstrates a commitment to continuous improvement aligned with national standards.

Incorporating these frameworks also enables benchmarking against peers and provides a consistent method for evaluating the impact of transformation initiatives. The CCIAF's four-stage maturity scale offers detailed diagnostics for public sector organisations, while the LGA model helps local authorities assess procurement leadership, commercial behaviours, and delivery of community outcomes. Using these tools as part of ongoing monitoring supports transparency, strengthens governance and provides a clear line of sight between business case objectives and programme improvements to be delivered.

The framework should include a structured set of Key Performance Indicators (KPIs), aligned with the programme's core objectives: delivering value for money, improving compliance and control, enhancing efficiency, and strengthening strategic procurement capability.

KPIs will be tracked and reviewed quarterly by the Procurement Steering Group, with oversight from the Finance Board. Performance dashboards will support operational visibility and strategic assurance.

Initial KPIs will be developed during mobilisation and refined as the Procurement Hub matures. Indicative measures could include the following:

- % of third-party spend under contract
- % of invoices matched to POs (invoice match rate)
- % of spend compliant with “No PO, No Pay” policy
- Value and number of tenders conducted through compliant routes
- Contract register completeness and renewal timeliness
- Realised savings vs forecast
- Supplier rationalisation (% reduction in supplier base)
- % of spend influenced by category strategies

KPI data will be sourced from the new digital systems (Unit4, Proactis, Scanmarket), supported by the Procurement Hub’s data function. This will also feed into formal benefits realisation reporting.

The KPI framework will support performance monitoring, decision-making and accountability. As the procurement function becomes embedded and matures, KPIs will evolve to reflect wider service delivery outcomes and supplier performance.

Next Steps

Following submission of this Outline Business Case, the next step will be formal review and approval by senior officers and members, in line with the Council's governance arrangements. Subject to approval, the programme will move into mobilisation and early implementation during the remainder of 2025/26.

Between now and April 2026, a number of activities will be undertaken to establish the conditions for successful delivery:

- **Completion of Organisational Design:** final design of the organisational structure, development of job descriptions and person specifications and job evaluation
- **Communication and Consultation:** part of the change management process to move from the current structure and ways of working to the new corporate procurement hub and staff structure
- **System procurement and implementation**: Procurement and ongoing implementation to secure AP automation and Scanmarket modules via the existing Unit4 framework. Implementation planning, configuration, and testing will follow immediately.
- **Recruitment to the Corporate Procurement Hub**: Appointment of key leadership and operational roles within the new structure to drive delivery and embed new practices.
- **Programme mobilisation**: Development and mobilisation of a temp 'surge' resource to deliver transformation delivery plans, savings from day 1 and meet the aims and objectives of the business case with reporting lines to ensure oversight through the Finance Board and Procurement Steering Group.
- **Policy and process development**: Drafting and rollout of revised procurement policy, including enforcement mechanisms such as "No PO, No Pay" and category planning.
- **Engagement and communications**: Stakeholder engagement across departments to prepare, train and communicate with service areas for the shift in policy, systems, and expectations.
- **Baseline and KPI development**: Establishment of baseline procurement data and development of an initial KPI dashboard to enable early monitoring and benefits tracking.

By April 2026, the Council aims to have the new staff structure and key systems in place, a partially mobilised hub, alongside a live roadmap and programme for transformation contract priorities, procurement pipeline, processes and ways of working, phasing in new controls, practices and performance reporting – making a decisive shift to a modernised procurement model at Bury Council.

Annex A – Functional Activities Description

1. Design & Commissioning

This activity focuses on defining service needs, engaging the market early, and laying the groundwork for effective procurement.

- **Market & Supplier Shaping**: Understanding and influencing the supplier landscape to ensure the right market conditions and capacity exist to meet service needs.
- **Co-Design of Services**: Collaborative development of service models with internal stakeholders, providers, and service users to ensure alignment with outcomes.
- **Specification Development**: Drafting clear, outcome-focused specifications that define what is being procured and the expected standards of delivery.
- **Early Market Engagement**: Conducting soft market testing, supplier events, and dialogue to gauge interest, inform specifications, and foster competition.
- **Commissioning Planning**: Aligning commissioning intentions with budget, strategy, and procurement timelines to ensure readiness and coordination across services.

2. Procurement Management

This activity ensures procurement is strategically managed, compliant, and delivers value through effective tools, governance, and processes.

- **Procurement Strategy & Governance**: Setting policies, standards, and strategic direction for procurement across the organisation.
- **Category Planning and Sourcing**: Grouping similar areas of spend to enable strategic sourcing, aggregation, and economies of scale.

- **Supplier Onboarding & Aggregation**: Managing supplier registration, due diligence, and consolidating supplier relationships for efficiency and control.
- **Procurement Process Management**: Executing compliant and efficient tendering processes, from advertisement to award.
- **Contract Lifecycle Management**: Overseeing contracts from initiation through to renewal or exit, ensuring performance, compliance, and continuity.
- **Compliance, Risk & Spend Analytics**: Monitoring procurement activity to ensure compliance, manage risks, and provide data-driven insights into spend and supplier performance.
- **Framework & System Management**: Managing corporate procurement systems and frameworks to enable consistent, efficient, and controlled procurement processes.

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3. Contract Management

This activity ensures that contracts deliver what was agreed, suppliers are held to account, and risks are actively managed throughout delivery.

- **Supplier Relationship Management**: Building structured, collaborative relationships with key suppliers to drive performance, innovation, and continuous improvement.
- **KPI and Outcome Monitoring**: Tracking contract-specific performance indicators and service outcomes to ensure commitments are being met.
- **Performance & Cost Control**: Monitoring quality and financial performance to prevent drift, overspend, or underperformance.
- **Compliance Reporting**: Regularly reporting on adherence to contractual, regulatory, and ethical standards.
- **Renewal & Exit Planning**: Preparing for contract expiry or transition by planning retendering, renewal decisions, and exit strategies well in advance.

Annex B – Target Operating Model Functional Breakdown

1. Strategic Leadership and Governance

- **Procurement strategy development** aligned with council-wide priorities to ensure consistency and clarity of purpose.
- Development and enforcement of procurement policy, procedures, and standards to drive compliance and professionalism across the organisation.
- **Governance, risk management, and regulatory compliance**, particularly with frameworks such as the Public Contracts Regulations (PCR 2015).
- **Social value, climate targets, and ethical sourcing** embedded as standard considerations in all procurement activities.
- **Market engagement and innovation facilitation**, including early supplier dialogue and events such as supplier days to open up opportunities and foster innovation.
- **Oversight and assurance** provided to Cabinet, Audit Committee, and senior leadership to ensure transparency, accountability, and value for money.

2. Category and Contract Lifecycle Management

- **Strategic category management**, involving close engagement with service leads and commissioners to drive informed, efficient sourcing decisions.
- **Liaison with service design and commissioning** to align procurement activity with outcomes and service needs.
- **End-to-end contract lifecycle management** — covering planning, mobilisation, monitoring, and renewal or exit to ensure continuity and performance.
- **Framework development and management** to enable compliant, flexible, and efficient routes to market.
- Supplier performance monitoring and relationship management to drive continuous improvement and accountability.
- **Coordination of procurement pipeline planning and aggregation**, identifying opportunities across departments to reduce duplication and improve efficiency.

3. Sourcing and Commercial Delivery

- **Execution of compliant tendering processes** (e.g. RFQs, RFPs, ITTs) to ensure fair competition and best value.
- **Market research and benchmarking** to inform sourcing strategies and understand cost drivers.
- **Commercial negotiation and value engineering** to optimise pricing, terms, and contract outcomes.

- **Co-design of specifications with services** to ensure procurements are fit for purpose and aligned with operational needs.
- Embedding outcome-based contracts and commercial incentives to encourage high performance and service innovation.
- **Development of commercial offerings** for traded services or external income generation where appropriate.

4. Spend Control and Operational Efficiency

- **Financial reporting from Unit4** to assess the impact of procurement activities and support budget management.
- **Spend analysis** to enhance service-level accountability, identify overspend, and support savings initiatives.
- **Systematic management of contract and supplier data** to ensure visibility, traceability, and informed decision-making.
- **Use of e-procurement tools** (e.g. Proactis, Unit4) to standardise, streamline, and automate procurement transactions and workflows.
- **Demand management and procurement planning** to reduce waste, avoid duplication, and align purchases with strategic objectives.

5. Insight, Capability and Performance

- **Dashboards and reporting tools** for services, finance, and leadership to support data-driven decisions and oversight.
- **Evaluation of procurement impact** — covering savings, delivery performance, social value, and risk mitigation.
- **Training and development** programmes for procurement staff and commissioning colleagues to build capability and confidence.
- **Knowledge sharing and advisory support** across departments to ensure good practice is embedded organisation wide.
- **Response to FOI requests and public interest queries**, including the management and publication of contract registers and spend data to support transparency and accountability.

Annex C – Systems Investment to deliver procurement transformation

This overview annex outlines the three key procurement-related system options proposed, with an emphasis on what each delivers, the benefits they offer, and indicative costs.

Unit4 ERP with Marketplace Enhancements

Unit4 ERP forms the core of Bury's financial system and includes a procurement module that supports ordering, invoice matching, and internal control over spend. An optional enhancement is the Marketplace product, which allows catalogue-based ordering from approved suppliers. This helps reduce reliance on purchasing cards and supports better compliance with procurement rules.

The Marketplace acts as a one-stop shop for internal users, enabling structured purchasing and helping enforce "No PO, No Pay" policies. It is particularly effective when combined with tighter financial controls and complements other automation and governance improvements.

While costs for the Marketplace product are generally wrapped into the broader ERP programme, its benefits include reduced maverick spend, improved visibility of commitments, and better auditability of transactions.

Proactis AP Automation Module

Proactis provides an invoice capture and automation solution, integrated with Unit4, designed to reduce manual effort in accounts payable. Invoices are scanned and interpreted using AI and OCR, then matched to POs with minimal human involvement. The system includes a "Query Desk" for handling exceptions and enables suppliers to generate invoices directly from purchase orders (PO Flip), improving accuracy.

In practice, organisations achieve 68%+ straight-through processing rates, rising to 98% where Proactis manage the query service. This dramatically reduces the time finance teams spend on invoice handling, cuts errors, and improves supplier discipline over time. It also helps drive compliance with "No PO, No Pay" policies by flagging or rejecting invoices without valid Purchase Orders (PO's)

The estimated implementation cost is around £32,000 for processing 60,000 invoices per year. A managed service and additional modules like Supplier Relationship Management (SRM) are optional, allowing the council to scale the solution over time. There is proven value from similar implementations, such as at Wigan Council, where AP automation led to over £120k in annual savings.

Scanmarket – Contract Lifecycle and Spend Management

Scanmarket, delivered through Unit4, provides two key modules: Contract Lifecycle Management and Spend Analytics. These support better oversight of contracts,

ensure alignment with the Procurement Act 2023, and give visibility into spending patterns across the council.

The Contract Management module acts as a central repository for storing and monitoring contracts, including key metadata such as value, expiry, and supplier details. Spend Analytics uses AI to categorise and visualise council-wide spend, helping to identify compliance issues, aggregation opportunities, and pricing variances.

Scanmarket currently relies on manual integration for Procurement Act reporting, with standard API functionality expected by 2027. It supports publishing contract KPIs (e.g. for contracts over £5m) and allows full customisation of metadata fields to enhance reporting and automation. DocuSign is the default for contract signing, though integration with other platforms is possible.

The system includes comprehensive dashboards for spend and contract analysis, such as local supplier reporting by geography. Contract ownership can be assigned flexibly between procurement and services, with financial accountability aligned to service cost codes. It also features project management tools that align suppliers to processes, and while Scanmarket does not natively manage catalogues, it can integrate with Unit4 via Proactis using punch-out functionality.

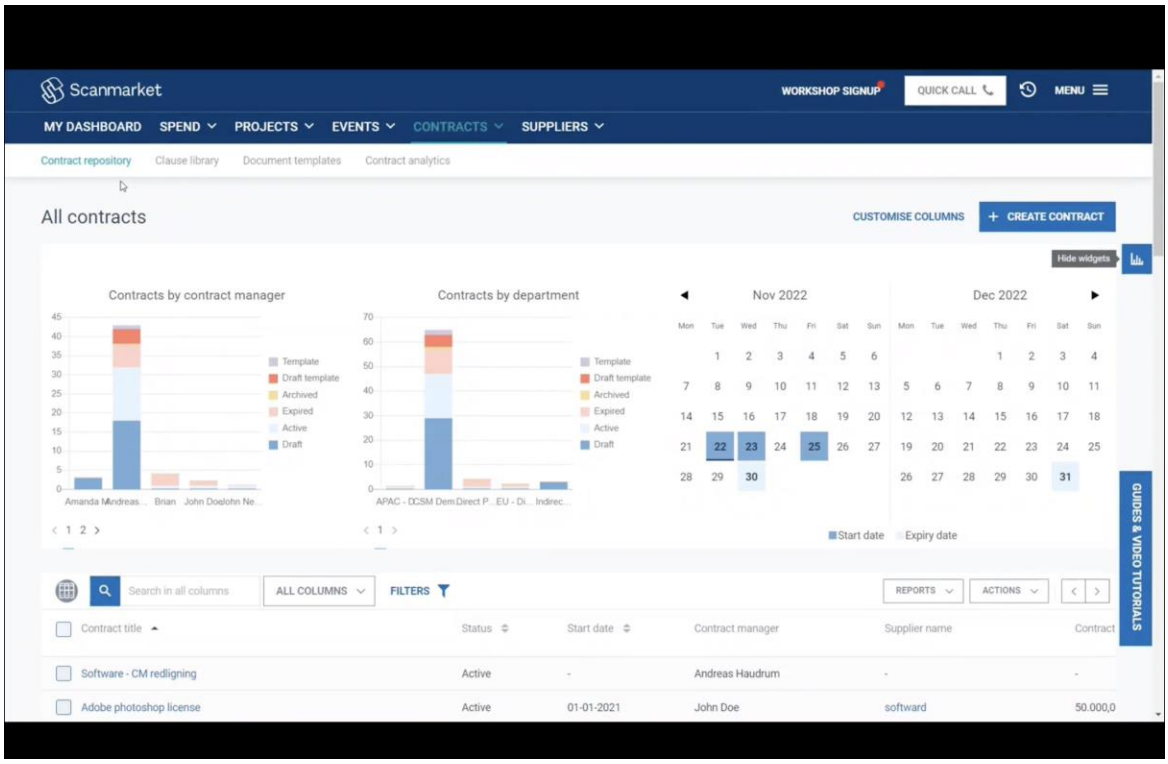
The proposed cost for the combined solution with ERP integration is approximately £49,000 per year, with a one-off implementation fee of around £41,000. A higher-specification option that includes supplier management functionality increases these costs. Onboarding is relatively straightforward, with an estimated implementation time of 8–12 weeks. However, these tools work best when part of a broader procurement transformation programme. On their own, they offer insight and governance, but not direct efficiency savings.

Summary of Indicative Costs and Focus Areas

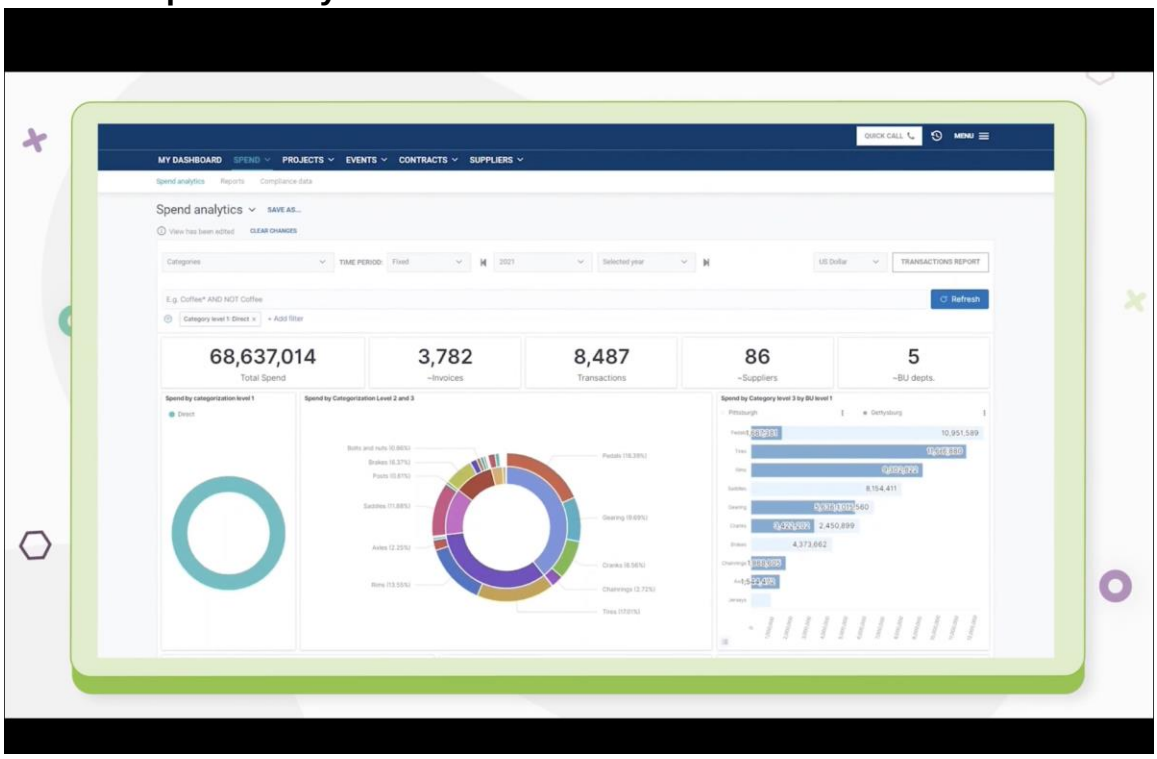
System	Indicative Annual Cost	One-Off Cost	Key Benefits
Unit4 ERP + Marketplace	Included in ERP scope	N/A	Better internal ordering, reduced maverick spend
Proactis AP Automation	~£35k plus query desk service as an option	£35k	High invoice automation, PO compliance, reduced AP workload
Scanmarket (Contract/Spend)	~£90k	£33k	Contract visibility, spend insight, supports legal compliance

Examples of Contract Lifecycle and Contract Spend Dashboards

Contract Lifecycle Management



Contract Spend Analysis



Annex D – Present and Proposed Costs

Present staff Costs			
Post	**Status**	**Salary**	**Salary plus On-costs**
Head of Service	Contract	£ 70,000	£ 91,000
Procurement Manager	Permanent	£ 45,000	£ 58,500
Procurement Officer	Permanent	£ 42,000	£ 54,600
Procurement & Contract Officer	Permanent	£ 55,000	£ 71,500
Agency other	Contract	£ 84,000	£ 109,200
Total Costs (excluding on-costs)	**4**	**£ 296,000**	**£ 384,800**
Proposed Revenue Costs - Staffing - Corporate Procurement Hub	**Grade**	**Salary**	**Salary plus On-costs**
Head of Procurement	Band B	£ 76,485	£ 100,698
Category Manager - Corporate Core	SM1	£ 57,057	£ 74,802
Category Manager - Health & Care	SM1	£ 57,057	£ 74,802
Category Manager - Children & Young People	SM1	£ 57,057	£ 74,802
Category Manager - Housing HRA	SM1	£ 57,057	£ 74,802
Procurement Officer - General	G12	£ 44,075	£ 58,530
Procurement Officer - General	G12	£ 44,075	£ 58,530
Procurement Officer - General	G12	£ 44,075	£ 58,530
Procurement Officer - General	G12	£ 44,075	£ 58,530
Procurement Apprentice	G6	£ 25,989	£ 34,205
Procurement Apprentice	G6	£ 25,989	£ 34,205
Sub-Total	**11**	**£ 481,013**	**£ 634,026**
One-Off 'Surge' Costs - Agency or Consultancy	**Status**	**Costs**	
Consulting Procurement Advisory Resource (12 months)	*External Agency/Contract*	*£ 250,000*	
Surge Sub Total Costs		**£ 250,000**	
Systems Costs - Scanmarket			
Scanmarket - Spend Analysis	3rd party	£ 32,500	£ 32,500
Scanmarket - Contract Lifecycle	3rd party	£ 32,500	£ 32,500
Scanmarket - Contract & Project Mgt	3rd party	£ 25,000	£ 25,000
Implementation costs	*3rd party*	*£ 32,500*	
Sub Total Costs		**£ 122,500**	**£ 90,000**
System Costs - Proactis AP Automation			
Proactis	3rd party	£ 35,000	£ 35,000
Query Desk (annual)	3rd party	£ 25,000	£ 25,000
One off implementation	*3rd party*	*£ 35,000*	
Sub Total Costs		**£ 95,000**	**£ 60,000**
Total Costs		**£ 467,500**	
Total Gross Investment Costs			**£ 784,026**
Less present Costs			£ 384,800
Net Annual Revenue Costs		**£**	**399,226**
One-Off Costs		**£**	**317,500**

Annex E – Risk Table – Procurement Transformation

Procurement Transformation - Delivery Risks				
Risk Category	**Description**	**Likelihood**	**Impact**	**Mitigation Measures**
Programme Delivery	Delay in system implementation or TOM go-live	Medium	High	Robust governance, phased planning, dedicated programme management
Cultural Resistance	Staff or services resist change, undermining new ways of working	High	Medium	Stakeholder engagement, training, and visible leadership support
Capability Gaps	Inability to recruit or retain key procurement roles	Medium	High	Competitive recruitment, early workforce planning, use of interim staff
Technology Integration	Unit4, Scanmarket, and Proactis fail to integrate seamlessly	Low	High	Vendor assurance, staged rollouts, strong technical PMO
Compliance Risk	Continued policy non-compliance by departments	Medium	Medium	Enforcement through system controls, policy refresh, KPI tracking
Financial Overspend	Investment costs exceed forecast	Low	Medium	Contingency included, financial governance embedded
Supplier Market Volatility	Unpredictable pricing or limited supplier responses to tenders	Medium	Medium	Strong pre-market engagement, use of frameworks
External Policy Change	Future legislation changes compliance expectations	Low	Medium	Ongoing horizon scanning, policy agility

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Agenda Item 11

Classification:	Decision Type:
Open	Key

Report to:	Cabinet	**Date:** 15 January 2026
Subject:	Procurement for Highways framework under the Procurement Act 2023	
Report of	Cabinet Member for Environment, Climate Change and Operations	

Summary

This report seeks Cabinet approval to proceed with the re-procurement of a Highways framework in compliance with the Procurement Act 2023.

The framework will be structured into several Lots covering all highways related works including as a minimum maintenance, surface dressing, major civils, highway structures with multiple suppliers per Lot to maintain works continuity

The Framework is projected to have an estimated spend of circa £60 million though actual expenditure will depend on available budgets, capital investment plans and any additional funding during the framework term. The framework will have a greater emphasis on social value outcomes and SME participation.

The Procurement process commenced December 2025 with the publication of a Planned Procurement Notice to inform the market of the upcoming tender. The procurement is scheduled to be concluded June-July 2026. Following this, a subsequent Cabinet report accompanied by an Award Report providing a full audit on the tender process will be presented to seek approval for awarding the framework.

Recommendation(s)

Cabinet is requested to approve to precede with the re-procurement exercise

Reasons for recommendation(s)

To maintain compliance with statutory obligations of the Procurement Act 2023.

Alternative options considered and rejected

1. Use Frameworks to source Bury's requirements

   Rejected: Framework providers typically apply a minimum 1% management fee. On a projected framework value of £60 million, this would amount to approximately £600,000, a cost the Council would avoid by delivering the framework directly.

Authors and Contact Details:

Name: Kevin Fletcher
Position: Interim Head of Procurement

Department: Corporate Core
E-mail: k.fletcher@bury.gov.uk

Background

The existing Highways Framework has successfully supported the delivery of highways related services across multiple Lots, including Minor Civils and Highway Structures. It has proven to be an effective mechanism for delivering both planned and reactive works efficiently, leveraging established suppliers and robust performance monitoring processes.

During the tender process, procurement will work with Highways department to review direct awards/options via frameworks where appropriate to deliver compliance and maintain service continuity.

The new framework will broaden its scope to include additional disciplines/Lots and place greater emphasis on social value outcomes and SME participation.

Links with the Corporate Priorities:

1. **Enterprise** – The re-procurement of a new framework will assist the Council in achieving its best value obligations under the Local Government Act 1999.
2. **Place and Community** – Maintaining continuity of highways services supports safe, accessible, and resilient communities, underpins economic growth, and enables delivery of active travel and sustainable transport schemes across the borough.

Equality Impact and Considerations:

3. There are not likely to be any changes that have equality impacts as a result of this activity.

Environmental Impact and Considerations:

4. Not applicable

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
The Council is required to meet its statutory highways maintenance implications under the Highways Act 1980.	Failing to re-procure would hinder the Council in fulfilling its statutory obligations, delay highway capital investment deadlines, and compromise

Potential challenge from suppliers	highways maintenance, negatively impacting highway users in Bury. The project will be compliant with the Procurement Act and regular highlight reports provided on progress to provide assurance.

Legal Implications:

The re-procurement will be conducted in accordance with the Procurement Act 2023. Legal services will be contacted, where necessary, in respect of any terms and conditions queries.

Financial Implications:

Costs will be met from existing budget provision and the capital programme.

Background papers

Please include a glossary of terms, abbreviations and acronyms used in this report.

Term	Meaning
SME	Small and Medium-sized Enterprises
Procurement Act 2023	The Procurement Act 2023 is a UK law that came into effect in February 2025, replacing the previous EU-derived procurement regulations. Its purpose is to simplify, modernise, and improve transparency in public procurement while promoting fair competition and social value.
Framework	A contract between a contracting authority and one or more suppliers that provides for the future award of contracts by a contracting authority to the supplier or suppliers
Planned Procurement Notice	An optional notice published at the pre-procurement stage to give advance information to the market about an upcoming procurement. It is designed to help suppliers prepare early and decide whether they wish to bid. When used correctly, it can also allow contracting authorities to reduce the minimum tendering periods in competitive procedures.

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Agenda Item 12

Classification: Open	Decision Type: Key

Report to:	Cabinet	**Date:** 15 January 2026
Subject:	Highway Asset Management Plan	
Report of	Cabinet Member for Environment, Climate Change and Operations	

Summary

1. This year, the Government announced that 25% of a £500 million UK local highway maintenance fund for 2025 to 2026 is contingent on us demonstrating that we are using best practice asset management practice.

   For this funding round we have drafted the attached Highway Asset Management Plan (HAMP) in order to formalise our approach to highway maintenance. This HAMP is a starting policy that will be developed and refreshed as required. Any proposed addition or change will be brought to Cabinet for your consideration.

   This report sets out the reasoning and background for the requirement of a HAMP and how it links to corporate priorities.

   We seek your approval to adopt the HAMP as a developing policy.

Recommendation(s)

2. That the HAMP be approved.

Reasons for recommendation(s)

3. To formalise our asset management approach.

Alternative options considered and rejected

4. To not approve the HAMP.

Report Author and Contact Details:

Name: Pete Stokes
Position: Head of Engineering & Streetscene
Department: Place
E-mail: p.stokes@bury.gov.uk

Background

5. Our highway assets are currently valued at approximately £1.2 billion on a Gross Replacement Cost basis and are the most valuable assets the Authority manages.

Given the amount of money required to fund highway maintenance it is essential that we manage the network as efficiently as possible.

In recent years, Government has incentivised the uptake of asset management principles by setting aside portions of their available funding amounts and making them dependent on assessment that our working practices are in line with the recommended asset management approach.

The recently announced UK local highway maintenance fund for 2025 to 2026 is contingent on us publishing a local highway maintenance transparency report and sending them further information about our strategic approach. The report gives information that helps local taxpayers understand our maintenance approach and how the funding is spent.

We have published the required information on our website and have provided the report to the Department for Transport explaining our asset management practices.

A key requirement for eligibility for the incentive element of the funding is to demonstrate that we continue to have an appropriate balance of structural, preventative and reactive maintenance i.e. we have adopted the principle that prevention is better than cure.

Links with the Corporate Priorities:

6. Well-maintained highways improve accessibility and safety, enabling communities to feel more connected and confident in their local infrastructure.

Reliable road networks reduce transport costs, support logistics and supply chains, and attract investment. Maintenance prevents costly deterioration, ensuring infrastructure remains a driver of economic activity.

Inclusive highway design and upkeep—such as accessible crossings, cycle lanes, and footways—ensure that public spaces are usable by all, including children, older people, and those with disabilities.

The highway service supports the installation of digital infrastructure (e.g. fibre broadband) and ensures transport networks remain efficient, reducing delays and improving multimodal connectivity.

Investing in local contractors and workforce for maintenance activities helps retain economic value within communities, supporting local employment and skills development.
Safe, well-maintained roads reduce accidents and encourage active travel (walking, cycling), contributing to physical and mental health. Reduced air pollution from smoother traffic flow also benefits public health.

Maintenance that considers diverse user needs—such as tactile paving, dropped kerbs, and clear signage—promotes equitable access and ensures no group is disadvantaged in using public highways.

Equality Impact and Considerations:

7. There are no equalities impacts as a result on this plan, however individual projects or activities under this plan may require an individual Equality Impact Assessment at that time.

Environmental Impact and Considerations:

8. There are no environmental impacts linked to approval of this plan, however individual projects or activities under this plan may have impacts which require consideration at that time.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
Failure to approve the HAMP as a developing plan could jeopardise future capital funding allocations.	Approval of the HAMP as a developing plan will allow access to future incentive based capital funding allocations

Legal Implications:

9. Section 41 of the Highways Act 1980 imposes a duty on the Highway Authority to maintain those highways which are maintainable at public expense.

Financial Implications:

10. Approval of the HAMP will reduce the risk of a reduced financial allocation from the local highway maintenance fund.

Appendices:

Appendix 1 - Highway Asset Management Plan (HAMP)

Background papers:

None.

Please include a glossary of terms, abbreviations and acronyms used in this report.

Term	Meaning
HAMP	Highway Asset Management Plan

Highway Asset Management Plan (HAMP)

Updated January 2026

Version 1.1

1. Introduction

The Metropolitan Borough of Bury is just under 100 km2 in area and has a population of around 194,000. It is composed of six towns: Bury, Prestwich, Radcliffe, Ramsbottom, Tottington and Whitefield.

The highway network is one of the main elements underpinning the strong performing economy of Bury. It provides access to jobs, commerce, services, schools, health care and communities that are the drivers of the economy and is a major influencing factor on how the quality of everyday life within the Borough is perceived.

Effective and efficient management of the highway network is a key factor in the ability of the Council to deliver its services and enable the economy of Bury to continue to thrive. A well maintained highway network plays an essential role in supporting growth and attracting increased investment in the Borough and it is the single most valuable asset owned and operated by Bury Council, currently valued at £1.273 billion.

This Highway Asset Management Plan (HAMP) sets out the approach used by Bury Council to maintain the highway.

2. Asset Description

The highway network comprises all the carriageways, footways, street lights, cycleways, verges, signs, drains, road markings, street furniture, structures, verges and highway trees within the adopted highway maintained by Bury Council as a Local Highway Authority (HA) at the public expense.

Asset Type	Quantity (approx.)	Unit	GRC Value £m (approx.)	Serviceable Life (if maintained)
Carriageways	629	km	857.9	40 years
Footways	1,200	km	205.1	30 years
Highway Structures	127	no.	177.7	30 years
Lighting Columns	21,000	no.	32.3	30 years concrete 30 years non galvanised steel 40 years galvanised steel
Public Rights of Way	330	km		30 years
Guardrail	15	km		30 years
Signs & Bollards	22,000	no.		12 years signs 20 years bollards

3. Financial Summary

Funding sources

Funding for highway maintenance in Bury is provided from revenue supplied centrally from the Government and capital supplied centrally from the Government via the GMCA through City Region Sustainable Transport Settlements (CRSTS). A proportion of the CRSTS allocation is ringfenced to maintenance of our Key Route Network (KRN).
Revenue money is typically used to fund day to day reactive maintenance of the highway in order to meet the statutory requirements to provide a safe network for users.
Capital funds are used for more extensive and planned works typically extending the life of the
asset or adding new components.
Recognising the importance of our highway network Bury Council has supplemented this funding with £30million additional capital for highway maintenance over the 9 year period 2016/17 to 2025/26, through our Highway Investment Strategy (HIS). In addition to our HIS programme significant capital funds in excess of £10m have been allocated to our street lighting LED replacement programmes.

Capital Budget Source

Year	CRSTS £k	CRSTS (KRN) £k	HIS3 £k	LED £k	Total £k
2023/24	2,546	900	3,167	1,525	8,138
2024/25	2,546	900	3,167	1,082	7,695
2025/26	2,546	900	3,167	1,082	7,695
2026/27	2,546	900		1,082	4,528

4. Service Delivery

This section provides a brief overview of how current highway maintenance services are delivered and how the condition of the highway asset is monitored.

Bury Council wants to maintain its roads so that they are fit for the future, whilst recognising the need to deliver this service efficiently and against a backdrop of tighter budgets, increased costs and greater demand from customers.

To aid Bury Council to achieve this it has accessed the resources made available through
the Highways Maintenance Efficiency Programme (HMEP) which was established by Government to support the sector on its journey to transform highway services.

Bury Council have already adopted HMEP's principal of 'prevention is better than cure' and
'right first time permanent repairs' to provide efficient highway services in the Borough. Early adoption of innovative repair techniques is a fundamental principal of our approach to service delivery, demonstrated by the acquisition of a Spray Injection Patching machine and use of MMA patching.

Types of Maintenance
The highway maintenance service, which covers Carriageway, Footway and Cycleways, is organised into three distinct activities comprising of Reactive, Planned Resurfacing and Preventative Maintenance.

Reactive Maintenance
Reactive Maintenance is the regular on-going work that comprises the day-to-day reactive fault
repairs dealing with defects such as broken flags or potholes. The work is usually generated from routine highway safety inspections and reports from the public.

Bury Council has adopted a risk-based approach to reactive maintenance as advocated by 'Well Managed Highway Infrastructure' which is the national code of practice.

Planned Resurfacing
Planned resurfacing works programmes are generate through an evidenced based system of site selection. Our resurfacing programmes are developed to match available funding considering weighted factors including condition data, accident data, insurance data and street hierarchy.

Planned resurfacing restores the highway to a generally good condition.

Preventative Maintenance
Preventive maintenance is the most efficient form of highway maintenance. In recognition of this Bury Council strives to maximise the use of preventative maintenance whilst ensuring it is used appropriately.

Preventative maintenance surface treatments designed to prolong the design life of a highway usually by means of a micro-asphalt, surface dressing or slurry sealing process before serious
deterioration sets in which will escalate rehabilitation costs without typically restoring condition.

Highway Drainage
A well-functioning highway drainage is essential to maintain the integrity of the highway structure.

Gully cleansing is carried out on a planned and routine basis, with a standard frequency of once every 12 months. This applies to carriageway gullies located on the borough's strategic and road network. Known areas prone to localised flooding are also checked in advanced of predicted high intensity rainfall.

The process of gully cleansing involves the removal of accumulated silt and debris from gully pots, which is typically washed in by surface water. Regular cleansing helps to maintain effective drainage, reducing the risk of blockages and subsequent surface water flooding.
We do not clean gullies which clearly are free from the build up of silt and are functioning satisfactorily.

Gully silt levels are being recorded and will be used in future to aid the development of dynamic cleansing regimes to increase efficiency.

5. Monitoring Highway Condition

To support a proactive and preventative approach to highway maintenance, Bury Council undertakes a range of condition monitoring surveys. These surveys enable the majority of highway-related works to be planned in advance, reducing the need for reactive interventions.

The primary condition surveys used are those aligned with the United Kingdom Pavement Management System (UKPMS), as endorsed by the Department for Transport. These include:

- **SCANNER Surveys (Surface Condition Assessment of the National Network of Roads):** These machine-based surveys are conducted on the classified road network (A, B, and C roads). They collect detailed surface condition data, which helps identify areas requiring further investigation by highway engineers.
- **Coarse Visual Inspection (CVI):** CVI is a superficial assessment carried out from a moving vehicle, allowing for annual visual monitoring of the unclassified road network, typically residential streets. This survey highlights locations that may need more detailed examination.

These monitoring techniques form a key part of our asset management strategy, ensuring timely interventions and supporting the long-term sustainability of the highway network.

Skid Resistance and Footway Condition Surveys

To further support a data-driven approach to highway maintenance, Bury Council undertakes additional specialist surveys to assess both carriageway safety and footway condition.

- **SCRIM Surveys (Sideway-force Coefficient Routine Investigatory Machine):** These surveys measure the skid resistance of the carriageway surface, primarily on the classified road network (A, B, and C roads). The data collected helps identify locations where reduced skid resistance may pose a safety risk, particularly in wet conditions. Areas flagged by SCRIM are subject to further investigation and, where necessary, targeted interventions to reduce the likelihood of skidding-related incidents.
- **Footway Condition Surveys:** While a national Footway Network Survey (FNS) was introduced in 2012, its broad classification criteria were found to be limited in scope. In response, Bury Council has adopted a more comprehensive local survey methodology, which incorporates not only physical condition assessments but also customer enquiries and complaints. This survey is conducted annually on foot, with a target of inspecting at least 25% of the total footway network each year. The resulting data provides detailed insight into asset condition and plays a key role in prioritising planned maintenance programmes and informing the annual Depreciated Replacement Cost (DRC) calculations.

Highway Safety Inspections

Highway safety inspections form a critical component of Bury Council's risk management strategy, aimed at reducing the likelihood of accidents on the public highway. The primary objective of these inspections is to identify defects on the adopted highway network that may pose a danger or cause serious inconvenience to road users or the wider community, and to ensure timely repair.

All inspections are carried out in accordance with the Council's Highway Safety Inspection Policy. This policy not only guides operational practice but also plays a key role in supporting the Council's legal defence under Section 58 of the Highways Act 1980, in response to claims arising from alleged highway defects.

Structures

Bury Council applies three broad maintenance approaches to manage and maintain highway structures, including bridges, retaining walls, and culverts:

Reactive Maintenance: This involves responding to emergency incidents such as bridge strikes or other urgent structural issues. It includes essential repairs required to ensure public safety and maintain network availability.

Planned Maintenance: This approach focuses on preventative measures and long-term asset sustainability. It includes component renewal, structural upgrades, widening schemes, headroom improvements, and full replacements where necessary.

Regular Maintenance: This encompasses routine inspections, structural reviews and assessments, and the ongoing management of substandard structures. It ensures that assets remain safe and serviceable, and that risks are identified and addressed in a timely manner.

These approaches are coordinated to ensure the structural integrity, safety, and longevity of the borough's highway infrastructure.

Monitoring Structures Condition

To ensure that highway structures do not pose an unacceptable risk to public safety and remain available for use with minimal disruption, Bury Council undertakes routine inspections in line with industry best practice. These inspections help maintain structural integrity and support effective asset management.

Two main types of inspections are carried out:

General Inspections: Conducted every two years, these involve a visual assessment of all accessible parts of the structure to identify any obvious signs of deterioration or damage.

Principal Inspections: These are more detailed and involve close examination of all accessible components of the structure. They are typically carried out every six years by experienced qualified engineers, unless a risk assessment justifies an alternative inspection interval.

These inspections are essential for identifying maintenance needs, prioritising works, and ensuring the continued safety and functionality of the borough's highway structures.

Street Lighting

Street lighting maintenance encompasses the management of street lights, illuminated traffic signs, and traffic bollards. These functions are divided into two categories:

Planned Maintenance

This includes routine servicing, scheduled inspections, and programmed upgrades or replacements. Planned activities help ensure the continued reliability and efficiency of lighting assets across the network.

Reactive Maintenance

This involves responding to faults, damage, or emergency situations as they arise. Examples include repairs following vehicle collisions, vandalism, or electrical failures that pose a safety risk or cause significant disruption.

This structured approach ensures that lighting assets are maintained effectively, supporting road safety, visibility, and public confidence in the highway network.

Monitoring Street Lighting Condition

To ensure that Bury Council undertakes the majority of its street lighting maintenance in a planned and proactive manner, a range of condition monitoring surveys are carried out. These surveys help assess the performance, safety, and structural integrity of lighting assets, including street lights, illuminated traffic signs, and traffic bollards. The key types of inspections include:

Electrical Testing and Inspection

Ensures compliance with safety standards and identifies faults or deterioration in electrical components.

Visual Condition Survey

Assesses the physical condition of lighting columns and associated equipment, identifying signs of damage, corrosion, or wear.

Structural Inspection and Testing

Evaluates the structural integrity of lighting columns, particularly those subject to environmental stress or aging, to ensure they remain safe and fit for purpose.

These inspections support effective asset management, enabling timely interventions and contributing to the reliability and safety of the borough's street lighting infrastructure.

Soft Landscapes and Environment

Soft landscapes and environment services encompass the management and maintenance of soft landscape assets, including grassed areas, shrubs, trees, weed control, and support for community-led initiatives. These services are categorised into two distinct operational types:

Planned Maintenance Routine and scheduled maintenance tasks that are programmed in advance to ensure consistent service delivery and alignment with seasonal requirements and asset lifecycle planning.

Reactive Maintenance Responsive interventions triggered by emerging issues or emergency situations, such as storm damage, vandalism, or public safety concerns, requiring immediate attention to mitigate risk and maintain service standards.

Bury Council's approach supports the long term health of the planted assets, ensures compliance with safety and visibility standards, and contributes to the overall environmental quality and amenity value of the highway network.

Grass Cutting

Grass cutting on highway verges is delivered as a planned annual maintenance activity, scheduled between April and October to align with the growing season and optimise operational efficiency. The highway network has

been assessed and classified in accordance with Bury Council's adopted network hierarchy policy. This hierarchy informs the prioritisation and frequency of verge maintenance across the borough.

Verge cutting frequencies are determined by the assigned hierarchy level, with service levels set at either 6, 13, or 15 cuts per annum. In addition, key locations—identified for their strategic, aesthetic, or safety importance—receive enhanced treatment, including boxing off to improve visual presentation and reduce arisings.

This approach ensures that resources are targeted effectively, supports safety and visibility standards, and contributes to the overall environmental quality of the highway network.

Shrubs and Hedgerows

The planned maintenance of highway-associated shrubbery is scheduled during the autumn and winter months. This is the optimal period for pruning and vegetation management and is in accordance with hedgerow management rules, which are designed to safeguard ecology including nesting sites. Maintenance frequency is determined by the location, visibility, and strategic profile of each site, with operations carried out either annually or bi-annually.

Highway Trees

Highway trees are inspected in accordance with the established street hierarchy as part of Bury Council's routine highway safety inspection regime. These inspections are designed to identify potential risks to public safety, infrastructure, and the health of the tree stock.

Tree surveys are conducted by qualified Arboricultural Officers at varying frequencies, determined by the condition, species, and location of each tree. This risk-based approach ensures that resources are focused where they are most needed and supports proactive asset management.

Planned tree maintenance activities—including pruning, crown lifting, and removal of deadwood—are typically scheduled during the autumn and winter months. This timing aligns with best arboricultural practice and minimises disruption to wildlife, particularly during the bird nesting season.

Weed Control

Weed control is delivered as a planned annual maintenance activity, scheduled between April and October to coincide with peak vegetation growth. The primary objectives of this service are to maintain the visual amenity of the highway network, ensure a safe environment for all road users, and prevent structural damage to highway assets caused by invasive vegetation.

To achieve these outcomes, a systematic application of herbicide is carried out across the entire highway network twice per year. This approach ensures consistent coverage and supports the long-term integrity of paved surfaces, kerb lines, and drainage infrastructure.

All operations are conducted in accordance with relevant environmental regulations and best practice guidance to minimise ecological impact and ensure public safety.

6. Lifecyle Planning

A core function of the asset management framework is to support a clear understanding of the long-term funding requirements associated with individual asset components. Lifecycle plans have been developed by the management group as near-optimal estimations, based on current knowledge of treatment lives and deterioration rates. These plans are integrated into the UK Pavement Management System (UKPMS) to inform calculations of depreciated asset value, particularly for carriageway assets.

The successful implementation of the Information Systems and Data Strategy outlined in this document will enable the development of more robust and cost-effective lifecycle plans. These plans will provide timely and accurate data to strategic decision-makers, ensuring that investment decisions are evidence-based and aligned with long-term service objectives.

Achieving this vision requires consistent engagement across all levels of the asset management framework. Reliable and regular data collection is essential, including the maintenance of up-to-date inventory records and the logging of works and associated costs at the component level. For highway and street lighting assets, this data is recorded within the Yotta system. Structural assets will utilise the system selected for Greater Manchester-wide use.

For the purposes of Whole Government Accounts (WGA) reporting, rudimentary lifecycle plans have been agreed for each Department for Transport (DfT) carriageway classification by the Association of Greater Manchester Authorities (AGMA) asset group. These plans serve as a baseline for financial forecasting and performance monitoring.

For Bury's carriageway network, the optimal maintenance strategy—based on current lifecycle modelling and treatment assumptions—has been calculated to require an annualised average investment of £9.5 million. This figure reflects the estimated cost of sustaining the network in a steady-state condition, ensuring that deterioration is managed proactively and that service levels are maintained over the long term.

The carriageway condition data reported through the Government's Single Data List—used as the basis for Whole Government Accounts (WGA) valuations—does not currently reflect a deteriorating asset. Given the significance of this data to the HAMP, it is essential to improve our

understanding of the reporting mechanisms and to scrutinise any unexpected year-on-year changes. This will ensure that asset condition trends are accurately captured and interpreted.

A key risk associated with prolonged underfunding of capital maintenance is that assets deteriorate beyond the point where cost-effective, whole-life interventions are feasible. For carriageway and footway pavement assets, this can result in the degradation of underlying structural layers, which typically have a longer design life than surface treatments. Once compromised, these layers may require full reconstruction, significantly increasing costs.

The principle of intervention efficiency is illustrated in Figure 3. In an optimal lifecycle plan, preventative maintenance treatments although more frequent are substantially less expensive than full rehabilitation. This approach maintains the overall network condition at a reasonable level and avoids extended periods of poor asset performance.

Conversely, a reactive strategy that allows assets to deteriorate to the point of failure results in higher long-term costs and reduced service levels. Therefore, maintaining timely and accurate data, supported by a robust information strategy, is critical to enabling informed investment decisions and sustaining network performance.

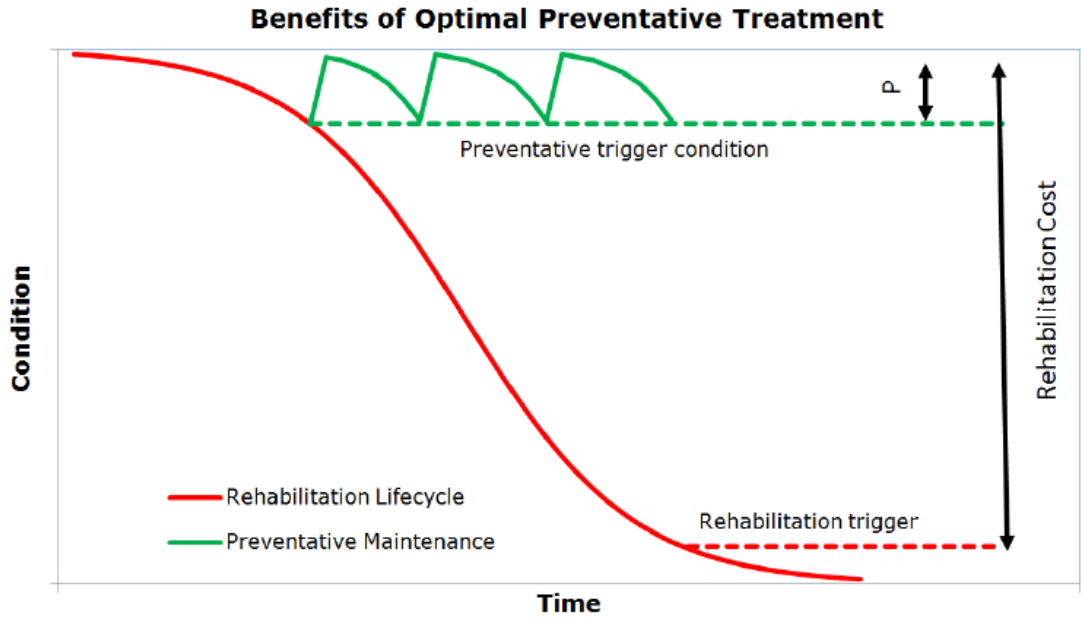

Figure 3

7. Service Standards and Performance

Service standards are established through the risk based approach adopted in maintaining our highway assets. Annual reviews are undertaken to gauge performance against established standards.

Bury benchmark performance across a range of metric with GM colleagues.

8. Customer Satisfaction

Bury Council recognises the importance of understanding what matters most to highway users and residents. To support this, the Council actively participates in the National Highways and Transportation (NHT) Public Satisfaction Survey—a nationally recognised benchmarking tool used across the sector.

Participation in the NHT survey enables Bury Council to assess its performance from the customer's perspective and compare results with similar authorities. This insight helps inform service planning, prioritisation, and continuous improvement across the highways network.

The feedback gathered plays a vital role in shaping future investment decisions and aligning service delivery with public expectations.

9. Collaboration

Bury Council is one of ten local authorities that form the Greater Manchester Combined Authority (GMCA). Through this partnership, councils work collaboratively to align service standards, share best practice, and pursue joint procurement opportunities where practicable.

A key element of this collaboration is the Greater Manchester Highway Asset Management Partnership, which promotes a unified approach to managing and delivering highway services across the region. This includes the development of shared performance frameworks, coordinated lifecycle planning, and joint bids for capital funding, particularly for schemes that span multiple authority boundaries.

Sharing performance data and learning from each other's successes and challenges ensures that Greater Manchester authorities, including Bury, continue to improve service delivery and achieve better value for money.

Agenda Item 13

Classification: Open	Decision Type: Key

Report to:	Cabinet	**Date:** 15 January 2026
Subject:	Extra Care Housing Strategy 2026 to 2036	
Report of	Cabinet Member for Adult Care, Health and Public Service Reform	

1. Summary

1.1 The term 'extra care' housing is used to describe developments that comprise of self-contained homes with design features and support services available to enable self-care and independent living, it comes in a variety of forms, and services may be designed by councils to meet the needs, demand and aspirations of their local communities.

1.2 This housing model is particularly attractive to older people because it allows them to maintain their independence while having access to the care and support services they may need as they age.

1.3 From an Adult Social Care perspective, we recognise that we must create a range of housing options for older people who need support to live well in their communities, to enable them to maintain their independence and exercise choice and control for as long as they are able to do so.

1.4 The Community Commissioning Division has produced this strategy to outline to our partners:

- The strategic context in which we are working
- The current 'extra care' housing market in Bury
- Our commissioning priorities and intentions for extra care housing from 2026 to 2036

2. Recommendation(s)

2.1 This report requests Cabinet approve the Extra Care Housing Strategy 2026 to 2036 and agree that the proposed arrangements for delivery and governance will sit with Bury Council's Extra Care Housing Delivery Group.

3. Reasons for recommendation(s)

3.1 It is recognised that most people who have care and support needs now, or in the future, wish to be supported in their own home, or a home that can better meet their needs. Increasing the supply of extra care housing in Bury is key to preventing and avoiding admissions to residential care and hospitals and this in turn contributes to our prevention agenda.

4. Alternative options considered and rejected

4.1 Should the Council decide not to proceed with the Extra Care Housing Strategy and do nothing; we would risk having an insufficient supply of appropriate housing for our ageing population.

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Department: Health and Care
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5. Background

5.1 Research

5.2 By understanding and addressing the needs of our ageing population, we can create communities that support healthy ageing and ensure that older adults can live fulfilling lives.

5.3 A range of research exercises have been completed, including consideration of the below strategic plans and data sets to ensure the Extra Care Housing Strategy aligns to the wider objectives of Bury Council:

- Let's Do It… Bury 2030 Strategy
- Bury Housing Strategy 2021 to 2025
- Bury Adult Social Care - Housing for Those with Additional Needs Strategy 2021 – 2025
- Bury Draft Local Plan
- Bury Market Position Statement 2025 -2027 Older People, Ageing Well & Dementia
- Bury Joint Strategic Needs Assessment
- Bury Draft Health and Adult Care Ageing Well Strategy 2025 – 2030
- Bury Prevention and Wellbeing Strategy - Health and Social Care 2025-2030
- Bury Council Housing Register
- Several local and national documents outlining principles, standards, guidance, and best practice

5.4 Consultation

5.5 The Community Commissioning Division has developed this strategy by consulting with the following stakeholders who have contributed to shaping the document and agreeing its 10 priorities:

- Bury Older People's Network (BOPN)
- Bury Older People and Ageing Well Partnership Group

- Bury Extra Care Housing Steering Group
- Bury Registered Housing Provider Partnership Framework
- Bury Housing Growth Group
- Healthwatch Bury
- Age UK Bury
- Bury Voluntary Community and Faith Alliance (VCFA)
- Several Bury Council Departments including Adult Social Care, Housing Services, and Planning Department
- Local Councillors

5.6 During summer 2025, face-to-face consultation took place, and an online survey was used to capture stakeholder views.

5.7 A 4-week public consultation was published on the Council's consultation page running from 27th October until 21st November 2025.

5.8 We will continue to consult with and involve the above groups to co-deliver our priorities and ensure our work considers the needs and aspirations of our older population, future generations, and diverse communities.

5.9 Our Priorities

5.10 Below are the commissioning priorities and intentions of the Extra Care Housing Strategy for the next 10 years:

- **PRIORITY 1** - Engage with networks across the borough, such as the Bury Older People's Network, the Voluntary and Faith Sector and other community groups, to ensure the needs and aspirations of our communities are heard and understood.

- **PRIORITY 2** – Recognise that people have different needs based on characteristics and circumstances. Continue to work with communities of identity to ensure we deliver inclusive and accessible services.

- **PRIORITY 3** - Ensure existing extra care housing schemes that are registered with Care Quality Commission (CQC) are inspection ready, by ensuring the Community Commissioning Team completes the Quality Assurance Framework.

- **PRIORITY 4** - Develop strong relationships between housing providers and care providers, to strengthen partnership working ensuring the needs and aspirations of tenants living in extra care are met to promote health, wellbeing, and independence.

- **PRIORITY 5** - Review the approach to extra care housing allocations; ensuring it is fit for purpose, clear, transparent and aligned to Bury's general needs social housing allocation policy. In addition, this will enable us to facilitate downsizing and free up social housing stock effectively.

- **PRIORITY 6 –** Introduce extra care housing waiting lists using the Adult Social Care Liquid Logic Case Management System to monitor need and demand going forward. Through effective marketing we will raise public and workforce awareness of extra care housing in Bury to allow people to plan for housing in later life.

- **PRIORITY 7 -** Work with our registered housing provider partners to agree a commitment to support and plan the development of up to 5 new extra care housing schemes in Bury by 2035, ensuring that provision is developed in at least 2 of the following areas: Prestwich, Whitefield, Tottington, Ramsbottom. Ensure there is capacity within the adult social care market to deliver the care and support required for these schemes.

- **PRIORITY 8** – Complete a detailed local cost benefit analysis of capital and revenue of current extra care housing schemes to inform future development intentions and design specifications.

- **PRIORITY 9** - Co-produce a set of 'Extra Care Housing Standards' to define what Bury residents can expect from the extra care housing offer. This will include ensuring that existing and new extra care housing schemes offer digital capacity and infrastructure to provide access to technological advances to promote independence and wellbeing. The Community Commissioning Division has developed a Co-production Charter that will be the reference for co-production activity.

- **PRIORITY 10** - In Bury we will ensure that the review of sheltered accommodation is aligned to this Extra Care Housing Strategy to ensure that consideration is given to regenerating old, outdated stock where possible to develop new extra care provision.

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6. Links with the Corporate Priorities:

6.1 The Let's Do It Bury 2030 Community Strategy sets out four clear principles which will underpin our work, these are:

Local

- Continue work to understand the needs of our ageing population in each neighbourhood area and develop local provisions for local people.
- Create local housing options to keep older people close to family and social networks.
- Prevent the need for older people to have to move out of the borough to have their care needs met.
- Work with local developers and providers who know the needs of our local area and Bury residents.

Enterprise

- Harness a spirit of enterprise and innovation to raise aspirations for older people.
- Encourage enterprise to drive inclusive economic growth through developers and registered housing providers investing in Bury.

Together

- Work with key stakeholders, including older people, housing partners, health and care partners, and developers to ensure we have the right provision in place.
- Work together to design quality, fit for purpose homes for older people that are inclusive, accessible, and welcoming.

Strengths

- Take a strengths-based approach to recognise the assets and strengths of communities and older people.
- Recognising the strengths of older people enabling their independence, choice, and control for their current and future housing.

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7. Equality Impact and Considerations:

7.1 A full EIA has been completed. The analysis has identified impacts across many characteristics which this strategy seeks to address and fully mitigate. Most impacts are neutral however impacts on age and disability are positive with these characteristics the most likely to be in need of extra care accommodation.

Please see Appendix 2 for Equality Impact Assessment.

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8. Environmental Impact and Considerations:

8.1 The council's new Extra Care Housing will meet HAPPI design standards and will be designed not only to meet the needs of residents but also to support our climate action commitments. By encouraging people to move into smaller, more efficient houses close to shops, services, and public transport, these developments reduce energy use and cut reliance on cars. Features such as high insulation, sustainable construction, and green outdoor spaces lower carbon emissions while improving wellbeing. With adaptable layouts and shared community facilities, the homes will be built to last, avoiding the need for future rebuilding and reducing waste. Together, these design choices make everyday living more sustainable, helping us move towards our net zero targets while creating vibrant, connected communities.

9. Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation

Lack of ownership for delivery and governance of the strategy and the 10 priorities.	The ownership for delivery and governance of this strategy will sit with Bury Council's 'Extra Care Housing Delivery Group'. The group will develop an action plan and will regularly review progress on the actions required to achieve our 10 commissioning priorities and intentions. The Community Commissioning Division will submit a bi-annual highlight report to the following groups to report on progress and escalate any risks identified to delivering our commissioning priorities and intentions for extra care housing in Bury: • Adult Social Care Senior Leadership Team • Older People and Ageing Well Partnership Board • Housing Services Senior Leadership Team • Housing Growth Group • Housing Advisory Board

10. Legal Implications:

10.1 There are no direct legal implications arising from the Extra Care Housing Strategy Report.

10.2 Further advice and legal support will be required on implementation of the various projects in terms of procurement, contracts and agreement and any staffing issues as well as other general advice as required at each stage.

11. Financial Implications:

11.1 There are no immediate financial implications arising directly from the report but will be identified, and advised, as they relate to future specific projects or programmes of activity linked to the rollout of the strategy.

Appendices:

Appendix 1: Extra Care Housing Strategy 2026- 2036

Appendix 2: Equality Impact Assessment

Background papers:

N/A

Bury Council

Extra Care Housing Strategy Health and Adult Care

2026-2036

CONTENTS

1. **Introduction**
2. **Vision & Objectives**
3. **Strategic Context**
4. **Current Position**
5. **Best Practice & Research**
6. **Our Commissioning Priorities and Intentions**
7. **Delivery of the Extra Care Housing Strategy**

1. INTRODUCTION

Why have this Strategy?

It is recognised that most people who have care and support needs wish to be supported in their own home, or a home that can better meet their needs. Increasing the supply of extra care housing in Bury is key for this, preventing and avoiding admissions to residential care and hospitals.

Our ambition is to work with our key partners to develop a range of high quality extra care housing schemes across Bury by 2035 for older people. This will enable more people to remain safe and live independently in a suitable home environment that meets their needs that connects them to communities and services they may need as they age.

Bury is a high demand area for housing and is an attractive place for people to live. From an Adult Social Care perspective, we recognise that we must create a range of housing options for older people who need support to live well in their communities, to enable them to maintain their independence and exercise choice and control for as long as they are able to do so.

We are committed to working collaboratively with our housing and development partners, health and care partners, and Bury residents to design and deliver housing options that meet people's needs as they age.

We have produced this strategy to outline to our residents and partners:

- The strategic context in which we are working.
- The current 'extra care' housing market in Bury.
- Our commissioning priorities and intentions for extra care housing from 2026 to 2036.

Consultation

Bury Council's Community Commissioning Division has developed this strategy by consulting with the following stakeholders who have contributed to shaping the document and agreeing its 10 priorities:

- Bury Older People's Network (BOPN)
- Bury Older People and Ageing Well Partnership Group
- Bury Extra Care Housing Steering Group
- Bury Registered Housing Provider Partnership Framework
- Bury Housing Growth Group
- Healthwatch Bury
- Age UK Bury
- Bury Voluntary Community and Faith Alliance (VCFA)
- Several Council Departments including Adult Social Care, Housing Services, and Planning Department
- Local Councillors

We will continue to consult with and involve the above groups to co-deliver our priorities and ensure our work considers the needs and aspirations of our older population, future generations, and diverse communities.

Quote from a Bury resident regarding the Extra Care Housing Strategy

"For me and all members of the LGBTQI+ community to know that we will be treated with the same respect and dignity that every recipient of extra care will receive shows true inclusivity"

What is Extra Care Housing?

The term 'extra care' housing is used to describe developments that comprise of self-contained homes with design features and support services available to enable self-care and independent living.

Properties should be designed and built to standards that allow aids and adaptations to be installed to ensure resident needs can be met. Extra care housing schemes are designed for people with a range of care needs, ensuring a balanced mix from low, medium to high. In addition schemes may accept older people with no care needs who wish to plan for their future. This housing model is particularly attractive to older people because it allows them to maintain their independence while having access to the care and support services they may need as they age.

Extra care housing (for rent or shared ownership) is becoming popular amongst older people as a housing choice and as a possible alternative to residential care. It is vital

for commissioners, developers, registered housing providers, and planners to better understand extra care housing for today's generation of older people and for future generations.

Extra care housing is not 'one size fits all' and schemes may vary in terms of size, design, and the level of care and support. This will be determined by local needs, demands, and aspirations.

Who is it for?

The eligibility criteria depend on the scheme, but residents are usually:

- Above a certain age – usually 55 or 60 years.
- Able to live safely on their own with access to support when needed.
- If people are living together as a couple, and one of them has care needs, extra care housing could make it possible for them to continue to live together.

What is the difference between Extra Care Housing and Sheltered Accommodation in Bury?

There are similarities between extra care housing and sheltered accommodation because every tenant has their own front door (self-contained private living space) and there are some communal shared spaces. However, sheltered accommodation does not include additional onsite care and support available in extra care schemes or the extra facilities such as a Salon or Bistro that would be expected in modern extra care schemes. Furthermore, some sheltered schemes offer older accommodation which may be considered outdated and unsafe, due to size, if a person develops mobility difficulties and requires aids and adaptations.

Both extra care housing and sheltered accommodation are classed as independent living and independence is always promoted where possible.

2. VISION AND OBJECTIVES

Bury Council's Vision

To provide a range of high-quality, person-centred 'extra care' housing options that promote independence, dignity, and improved health and wellbeing for older people in Bury.

Objectives

1. Enhance quality of life for older residents in Bury
2. Provide safe, secure and supportive living environments
3. Promote independence and reduce the need for more intensive care services
4. Provide facilities that promote community integration and social inclusion
5. Ensure accommodation is high quality and built to HAPPI Design Principles to enable people to age in place

3. STRATEGIC CONTEXT

By understanding and addressing the needs of our ageing population, we can create communities that support healthy ageing and ensure that older people can live fulfilling lives. Key strategic plans and data have been considered below to ensure the Extra Care Housing Strategy 2026 to 2036 aligns to the wider objectives of the Council.

Bury Council's Let's Do It! Strategy

The Let's Do It Bury 2030 Community Strategy sets out four clear principles which will underpin our work, these are:

Local

- Continue work to understand the needs of our ageing population in each neighbourhood area and develop local provisions for local people.
- Create local housing options to keep older people close to family and social networks.
- Prevent the need for older people to have to move out of the borough to have their care needs met.
- Work with local developers and providers who know the needs of our local area and Bury residents.

Enterprise

- Harness a spirit of enterprise and innovation to raise aspirations for older people.
- Encourage enterprise to drive inclusive economic growth through developers and registered housing providers investing in Bury.

Together

- Work with key stakeholders, including older people, housing partners, health and care partners, and developers to ensure we have the right provision in place.
- Work together to design quality, fit for purpose homes for older people that are inclusive, accessible, and welcoming.

Strengths

- Take a strengths-based approach to recognise the assets and strengths of communities and older people.
- Recognising the strengths of older people enabling their independence, choice, and control for their current and future housing.

Bury Housing Strategy 2021 to 2025

Bury Council's Housing Strategy and action plan sets out how we intend to work and what we intend to do to create the right conditions so that housing supports our Bury 2030 Vision. Key messages from the strategy include:

- More frail older people (75 and over) may be looking to downsize and may be more inclined towards a model of extra care within a 'natural community'.
- Older people would benefit from Lifetime Homes Standards and may want a safe space to park a buggy / mobility scooter.
- Up to 40% of people between the ages of 65 and 74 may be interested in moving to a more suitable, more manageable and often smaller home.
- The appetite to consider a move halves to around 20% by the time people reach 75 years.
- The desire to move into sheltered or extra care schemes is in fact highest for the 75 to 84 age group, at around 20% or more.
- New extra care housing and remodelled sheltered housing plays a significant part in housing our older population going forward.
- Two-bedroom apartments and bungalows with the right features and in the right locations, are very popular with older people.
- Building significant quantities of the right new homes attractive to our aging population will help release larger homes in all tenures- supporting a more dynamic housing market as more people find suitable homes in locations they want at different stages of their lives.
- Support registered housing providers deliver the right sort of housing, with the right features in the right places in line with our township visions and local plans.

Bury's Draft Local Plan

The Draft Local Plan sets out a long-term framework to manage future growth and development in the Borough up to 2042.

Together with the adopted Places for Everyone Joint Plan, Bury's Local Plan will form a key part of Bury's overall development plan and provide more detailed set of locally specific planning policies. Key messages relevant to the Extra Care Housing Strategy include:

New residential accommodation specifically targeted at older and disabled people should:

- Be well-integrated with the wider neighbourhood
- Offer easy access to community facilities, local services and public transport
- Provide sufficient car parking for occupiers, staff and visitors
- Be designed to reflect relevant best practice, including the Housing our Ageing Population Panel for Innovation (HAPPI ten key design elements
- Where appropriate, provide a range of tenures
- All new homes to meet the Nationally Described Space Standards and the accessible and adaptable standard in part M4 (2) of the building regulations.

Market Position Statement 2025 -2027 Older People, Ageing Well & Dementia

Bury's Market Position Statement for Older People, Ageing Well and Dementia informs providers of our commissioning intentions and facilitate conversations to build an

understanding on the needs of older people. Key highlights relevant to this strategy, include:

- A Housing Needs Assessment for Bury completed in 2021 suggests that an increased number of extra care housing schemes will be needed in Bury moving forwards. We plan to develop up to 5 new build extra care schemes over the next 10 years to offer improved housing options and choice to customers.
- Aim to reduce the number of commissioned residential beds significantly and increase the number of care and housing options available in the community. This includes more options for people with complex needs to avoid them being placed out of borough.

Bury Joint Strategic Needs Assessment (November 2024)

Key findings considered from the JSNA 2024 include:

- The unrounded population estimates by single year of age highlights there were 193,855 people living in Bury in 2021. The full breakdown of the population by age and gender shows that the most common age of people living in Bury is 56. It also shows that there are 1,445 people aged 90 and over, an increase from 1,228 in 2011.

- There are 35,447 (18.3%) older adults aged 65 years and over in Bury, similar to England average of 18.4%. Elton Vale (31.3%) and Summerseat (31.1%) have the highest proportion and Fernhill and Pimhole (9.6%) have the lowest proportion of older adults in Bury.

- Bury population has continued to age. Census 2021 results show that there has been an increase of 19.8% in people aged 65 years and over in Bury similar to 20.1% seen in England.

- Based on the results of Census 2021 for Bury, the highest difference by sex is in the 65+ age group (older people), where there are 3,254 more females compared with males. On average, females currently live longer than males, which significantly impact the sex profile of Bury's population.

- Older adults in Bury are expected to see the biggest increase of 15.4% with an additional 5,617 older adults between the years 2023 to 2032. During the same time period, England is expected to see an ever-greater increase of 21.4% in older adults.

- Overall, the data shows that there is a significant gap in life expectancy between the most deprived and least deprived areas, with the gap increasing for both sex especially for males in 2018-20 compared with 2011-13.

- For older adults, wider social determinants of health such as access to housing, food, financial resources, climate change and transportation, as well as social connections, play a critical role in better health outcomes and improving overall well-being.

- Income Deprivation Affecting Older People Index (IDAOPI) in Bury for the year 2019 is 14.5%, statistically higher than England average of 14.2%.

- East and Moorside are the most deprived wards in Bury and North Manor and Tottington are the least deprived wards in Bury.

- Social isolation, loneliness and higher levels of deprivation are all linked with pensioners who live alone. For older people, there is a strong correlation between isolation and loneliness.

- Individuals with dementia encounter substantial health challenges and may face a mortality risk that is at least twice as high as those without the condition. Based on the most recent data from 2020, prevalence of dementia in Bury is at 4.63%, significantly above England average of 3.97%.

- 78.2% of people in Bury are White (English, Welsh, Scottish, Northern Irish, or British), 10.6% of people are Asian, and many other ethnic groups make up the remaining 11.2% of people. Bury East has a large Asian community, and Prestwich has a large Jewish community (5.5% of the Bury population report Jewish as their religion).

The table below demonstrates the Bury population aged 65 and over, projected to 2040:

	2023	**2025**	**2030**	**2035**	**2040**
People aged 65 – 69	9,400	10,100	11,300	11,300	10,300
People aged 70 – 74	8,900	8,400	9,200	10,400	10,500
People aged 75 – 79	8,300	8,500	7,400	8,100	9,200
People aged 80 – 84	5,000	5,400	6,800	5,900	6,600
People aged 85 – 89	3,100	3,200	3,600	4,600	4,100
People aged 90 and over	1,700	1,800	2,100	2,500	3,200
Total population 65 and over	**36,400**	**37,400**	**40,400**	**42,800**	**43,900**

Further statistics inform that:

- The total population of Bury people aged **65-74 living alone** is predicted to rise from 4,524 in 2023 to 5,132 in 2040, with the majority here being female.

- The total population of Bury people aged **75 and over living alone** is predicted to rise from 7,391 in 2023 to 9,408 in 2040, again, with the majority here being female.

- The total population of Bury people aged **65 and over predicted to have dementia** is likely to rise from 2,560 in 2023 to 3,482 in 2040.

- The total population of Bury people aged **65 and over with a limiting long-term illness** (whose day-to-day activities are limited a lot) is likely to rise from 9,217 in 2023 to 11,527 in 2040.

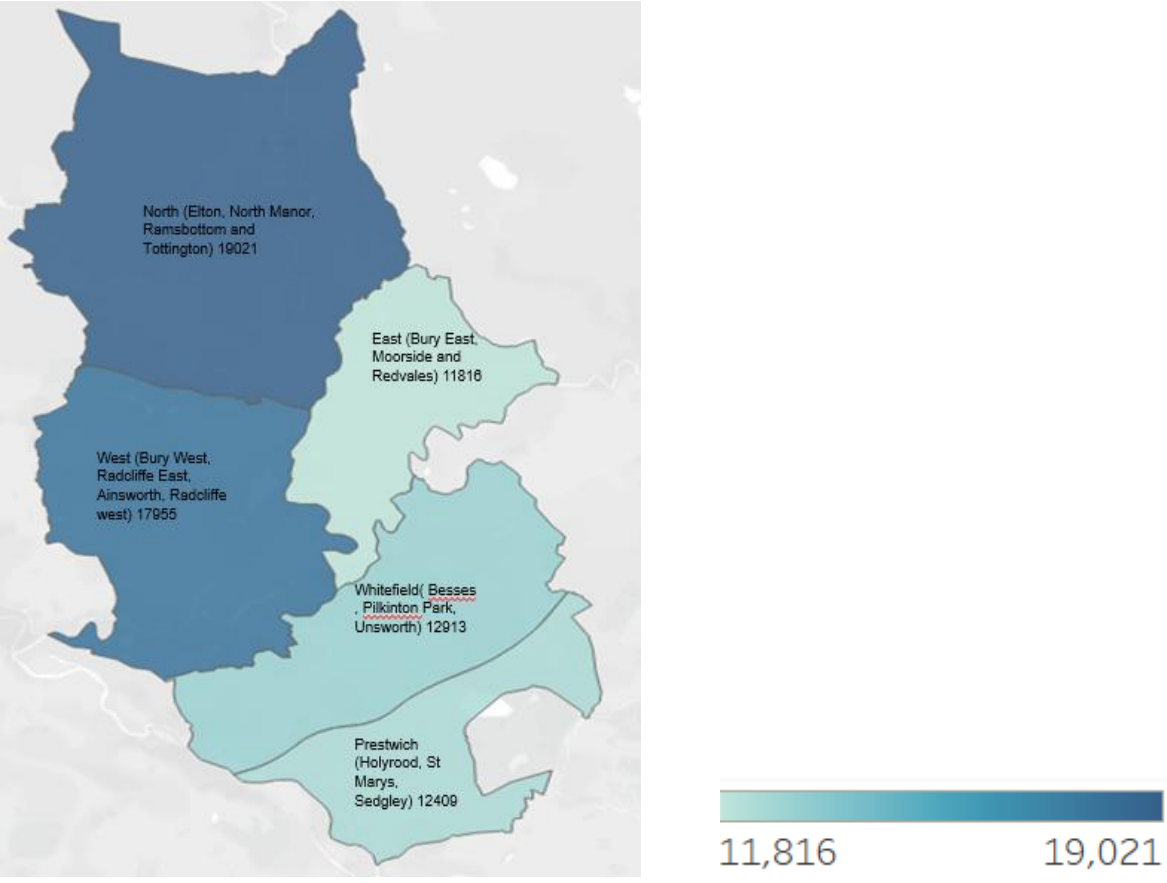
- The total population of Bury people aged **65 and over predicted to have a fall** is likely to rise from 9,657 in 2023 to 12,048 in 2040.

- The total population of Bury people aged **65 and over providing unpaid care** is predicted to increase from 5,144 in 2023 to 6,102 in 2040.

- The total population of Bury people aged **90 and over** is predicted to increase from 1,700 in 2023 to 3,200 in 2040.

Data taken from POPPI website in December 2024 (Projecting Older People Population Information System).

Figures taken from 2022 Mid-Year Population Estimates show that the majority of over 50s reside in north and west of the borough. The map below shows approximately where people aged 50+ live across the borough.



When considering locations for future extra care housing schemes in Bury, it is important to consider areas where the highest numbers of the over-50 population

reside, particularly in the north and west of the borough. Furthermore, we must consider where supply is currently located to achieve the objective of increasing choice for people across all the six towns.

Further considerations gathered in consultation with older people on this strategy highlight the importance of schemes having:

- Nearby transport links
- Nearby shops and amenities
- Nearby health services
- Secure car parking facilities
- Advancing Assistive Technology
- High performing Wi-Fi
- Sensory loss considerations
- Dementia friendly environments

We will ensure that these are considered in the development of Priority 9 'Extra Care Housing Standards'.

PRIORITY 1 - Engage with networks across the borough, such as the Bury Older People's Network, the Voluntary and Faith Sector and other community groups, to ensure the needs and aspirations of our communities are heard and understood.

Bury's Draft Health and Adult Care Ageing Well Strategy 2025 – 2030

Bury Council is committed to creating an inclusive and age-friendly community for residents and is proud to be a member of the UK Network of Age Friendly Communities:

UK Network of Age-friendly Communities | Centre for Ageing Better

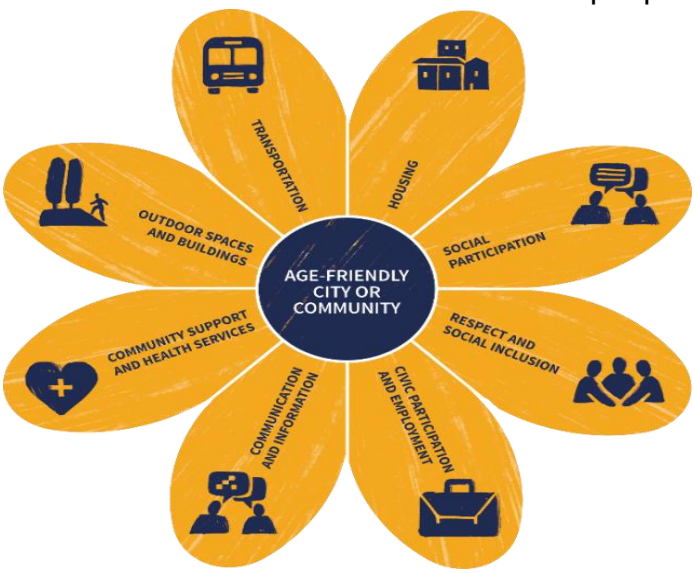
We want Bury to be a place that enables people to age well and live a good later life. Somewhere that people can stay living in their homes, participate in the activities they value, and contribute to their communities as long as possible.

Key messages we have considered from the Draft Health and Adult Care Ageing Well Strategy 2025 – 2030 are:

- Healthy ageing is not a challenge unique to Bury. Internationally, the **World Health Organisation (WHO)** has recently published a global strategy, with a new definition of healthy ageing: **"The process of developing and maintaining functional ability that enables wellbeing in older age."**

- It is important to see ageing as a social issue, and not a clinical one, as health and social care services are only one contributing factor. Another aspect is the physical and social environment that we live in enabling us to maintain our wellbeing.

- The WHO highlights 8 domains of liveability in which communities need to better adapt their structures to meet the needs of older people.



Bury's Ageing in Place Pathfinder (AIPP)

Bury is part of the **Ageing in Place Pathfinder (AIPP)** project, which is underway across Greater Manchester to ensure older people's voices are heard and valued in the places they live.

The Pathfinder represents a significant commitment from a wide range of stakeholders to establish resident-led partnerships in nine neighbourhoods in Greater Manchester. In these partnerships local organisations are working together with residents to agree and prioritise ways to improve the quality of life for residents as they grow older.

Persona, which is the LATCO (Local Authority Trading Company) for Bury Council, has been leading the project in Bury and has opened the Café on the Green in Clarence Park as the main community hub to create increased connectivity for residents. Bury will be rolling out this project to 5 other sites across the townships over the next 3 years with the 8 domains of liveability, including housing as a focus.

Bury's Prevention and Wellbeing Strategy - Health and Social Care 2025-2030

This Strategy sets out Bury's commitment to prevent, reduce and delay the need for adult care and support over the next 5 years by focusing on early intervention and prevention, ensuring that residents receive the support they need before issues escalate.

The strategy states that the outcomes that can be achieved through prevention may include:

- Enhanced independence, including the ability to navigate prevention and community services, as well as effective self-care.

- Improved quality of life and wellbeing for individuals who require care and support, along with their carers.
- Reduced social isolation and loneliness.
- Delayed or decreased need for care and support.

All these outcomes can be achieved for individuals living in 'Extra Care Housing'.

Bury Council Equality, Diversity, and Inclusion Strategy 2024 – 2028

Bury is a vibrant, diverse and cohesive Borough. It is home to over 190,000 people, every one of which should be enabled and empowered to maximise their life chances, play a active role in society and enjoy a high quality of life. Key shared objectives from this strategy include:

Equality – Where everyone is treated fairly, with dignity and respect and recognising we may need to treat people differently to achieve this.

Diversity – Understanding our differences and valuing these as a strength that we all benefit from.

Inclusion – Providing equal access and opportunity to participate in our workplaces, our communities and in the use of services regardless of personal characteristics or circumstances.

Bury's diversity includes (Census 2021):

- 51% Women and 49% Men
- Our age ranges are in line with the national demographic, but we are an older borough regionally
- 20.16% of our population are people from an ethnic minority
- 18.51% of our population consider themselves to be disabled
- Our population follow a range of different religions and belief systems with significant Christian, Muslim and Jewish populations
- 3.27% of our population identify as LGBTQIA+
- 8.71% of our population are unpaid carers
- 90.26% of our population speak English as a first language
- 2.60% of our population are veterans

PRIORITY 2 – Recognise that people have different needs based on characteristics and circumstances. Continue to work with communities of identity to ensure we deliver inclusive and accessible services.

Bury Adult Carers Strategy 2025-2029

Bury Council's 'Adult Carers Strategy 2025-2029' outlines the commitment to supporting unpaid adult carers in Bury. Key messages considered from the strategy include:

- **Demographic Data**: The 2021 Census data indicate an estimated 18,219 unpaid carers in Bury, with a growing intensity of care provided and a higher likelihood of women in deprived areas providing unpaid care.
- **Health and Wellbeing**: Unpaid carers often face negative impacts on their mental and physical health, quality of life, and outcomes, especially as the intensity of their caregiving role increases,
- **Commitments to Carers**: The strategy outlines four key commitments: early identification and support, access to quality support and information, raising the profile of carers, and reducing inequalities for under-represented groups.
- **Support Services**: Carers expressed the need for support services that are flexible, responsive, and available in all Bury neighbourhoods, including digital support and respite care.

Bury Sensory Impairment Strategy 2025 to 2029

Key messages we have considered from the 'Bury Sensory Impairment Strategy 2025-29' include:

- Sight and hearing loss can affect us at any age, but age is a significant risk factor related to eye health, sight and hearing loss.
- Sensory impairment is a factor in falls and subsequent admission to hospital, which is the major contributory factor to admission to a care home.

Further considerations gathered in consultation with older people on this strategy highlight the importance of ensuring new extra care housing schemes offer digital capacity and infrastructure to deliver technology to promote independence.

My mother, severely deaf, like me, found herself in a home where no-one understood how her hearing aids worked, so when batteries ran out, she became isolated and depressed. She couldn't talk to other residents; she couldn't hear what carers said to her, she couldn't hear the TV. I'll be luckier, I hope, when I need extra care.

But it's more than staff training that's needed now. Communications technology has advanced so far since then. I now have hearing aids enhanced by blue-tooth connectivity and AI-driven background noise cancellation. I have captioned TV , email and SMS, speech-to-text live transcription, and captioned video-calls to keep me in touch with friends and family. I can stay connected via social media. I can use my smartphone tablet or laptop to order my little essentials without having to ask others for favours. I can handle my own financial affairs via online banking and talk to my solicitor if I need to.

I have a fear of eventually finding myself in a home where I can do none of these things. Where there are no handy power points for my devices or for recharging them; where there's no access to Wi-Fi (or only for staff use!)

I have so many questions, so many anxieties. I'll just have to hope that those responsible for building new care homes today are listening; that they understand that the 'oldies' of today and tomorrow will have very 'modern' needs and expectations about support for communication, navigation, etc.

Feedback from Bury Resident, 85 yrs, severely/profoundly deaf

Bury's Dementia Strategy 2024 to 2029

Bury's Dementia Strategy is for people living with Dementia and their families and carers. The aim of the Strategy is to improve the health, wellbeing, and quality of life for people living with Dementia. Key messages considered from Bury's Dementia Strategy 2024 -2029 include:

- A strong emphasis on prevention and early intervention by taking a strength-based approach – which means identifying and maximising individual strengths and capabilities to support people, promote independence and improve quality of life.
- In England it is estimated 676,000 people have dementia. In the whole of the UK, the number of people with dementia is estimated at 850,000.
- Dementia mainly affects older people, and after the age of 65, the likelihood of developing dementia roughly doubles every five years. However, dementia can develop earlier, presenting different issues for the person affected, their carer and their family.
- There is a considerable economic cost associated with the disease estimated at £23 billion a year, which is predicted to triple by 2040.

Dementia in Bury

People aged 65 and over predicted to have dementia, by age and gender, projected to 2040	**2023**	**2025**	**2030**	**2035**	**2040**
People aged 65-69 predicted to have dementia	156	166	187	187	170
People aged 70-74 predicted to have dementia	271	256	280	317	320
People aged 75-79 predicted to have dementia	504	516	444	487	553
People aged 80-84 predicted to have dementia	554	588	754	654	732
People aged 85-89 predicted to have dementia	545	580	651	827	742
People aged 90 and over predicted to have dementia	530	554	636	731	966
Total population aged 65 and over predicted to have dementia	**2,560**	**2,659**	**2,952**	**3,202**	**3,482**
Percentage aged 65 and over, to have Dementia, projected to 2040	**7.03%**	**7.11%**	**7.31%**	**7.48%**	**7.93%**
	7% of Bury's population will have dementia, rising consistently to reach 8% in 2040.				

Source: Projecting Adult Needs and Service Information (PANSI) website

In May 2025**, 205** people registered with Bury 'Care Link' community / social alarm system and response to emergency calls service were recorded as 'affected by dementia'. An additional **103** people were recorded as having some form of memory difficulties, with no formal diagnosis. This is approximately 14% of the Care Link customer base.

The figures above provide an indication of the potential number of people with dementia in Bury who may benefit from extra care housing provision in the future to enable them to live safely and as independently as possible in their own homes, with an extra **543** people in Bury aged over 65 predicted to have dementia by 2035.

Housing for people with dementia – are we ready?

Published by the All-Party Parliament Group (APPG) on Housing and Care for Older People in 2021, key highlights include:

- Progress in the development of dementia-friendly housing has been far too slow and there is an urgent need to ensure housing is dementia-ready from the outset
- The majority of those living with dementia do not live in either purpose-built or adapted housing. This can place strain on people with dementia and their families and support networks as their care needs advance.
- Many do not receive adequate information on housing options and adaptations.
- The number of BAME people with dementia in England and Wales is likely to double to circa 50,000 by 2026.
- When producing housing plans, local authorities should clearly set out the housing demand for people living with dementia in their locality including estimates for need in BAME and LGBTQIA+ communities and how these targets will be met.

4. CURRENT POSITION

Supply:

There are currently three council-owned extra care housing schemes in Bury offering a total of 169 units of accommodation.

In Bury we have the following council owned schemes:

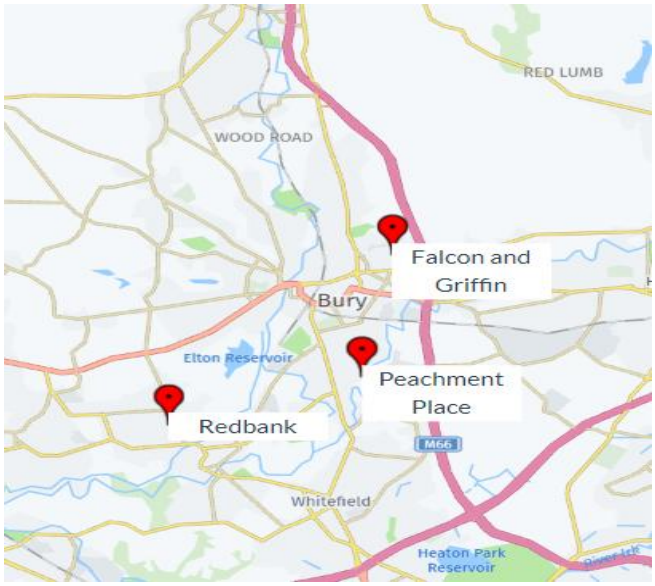
Falcon and Griffin (F&G) – was built in 1976 and renovated in 2003 and is owned and managed by Bury Council. The scheme is located in Bury East and comprises of 69 units in total; this includes 2 blocks of flats and 29 external properties including 1 bed bungalows and 1 bed maisonettes. It has communal spaces but no extra facilities that are typical in modern extra care schemes such as a bistro/cafe and hair salon.

Redbank - was built in 2012 to the HAPPI Design Principles and is owned[1] and managed by Bury Council who is the social landlord. The scheme is located in Radcliffe North and comprises of 38 two bed apartments and two one bed apartments (four of which have kitchens fully adapted for wheelchair users). In addition to a communal lounge, Redbank has a modern bistro/café and hair salon.

Peachment Place - was built in 2018 to the HAPPI Design Principles and is owned and managed by Bury Council who is the social landlord. The scheme is located in Redvales and comprises of 60 one and two bed apartments. Peachment Place has modern communal areas including a bistro/café and hair salon.

[1] Redbank is formally owned by Six Town Housing. The responsibility for managing and maintaining the scheme was transferred from Six Town Housing to Bury Council in February 2024.

The map below shows the location of the 3 current extra care housing schemes in Bury:



Care and Support

The care and support models delivered at each of the existing schemes varies:

- Falcon & Griffin: Wellbeing checks and onsite care and support throughout the day delivered by Bury Council, plus various commissioned domiciliary care agencies, throughout the day.
- Peachment Place: Wellbeing checks delivered by Persona and onsite care and support delivered by Persona, plus various commissioned domiciliary care agencies, throughout the day.
- Redbank: Wellbeing checks delivered by Persona, plus various commissioned domiciliary care agencies throughout the day.

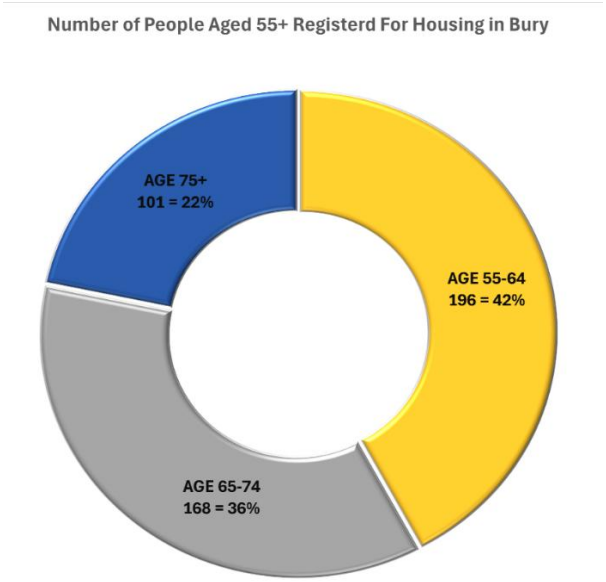
At night each scheme is covered by an emergency response service delivered by Persona, which is the LATCO (Local Authority Trading Company) for Bury Council in partnership with Care Link and Tunstall.

PRIORITY 3 - Ensure existing extra care housing schemes that are registered with Care Quality Commission (CQC) are inspection ready, by ensuring the Community Commissioning Team completes the Quality Assurance Framework.

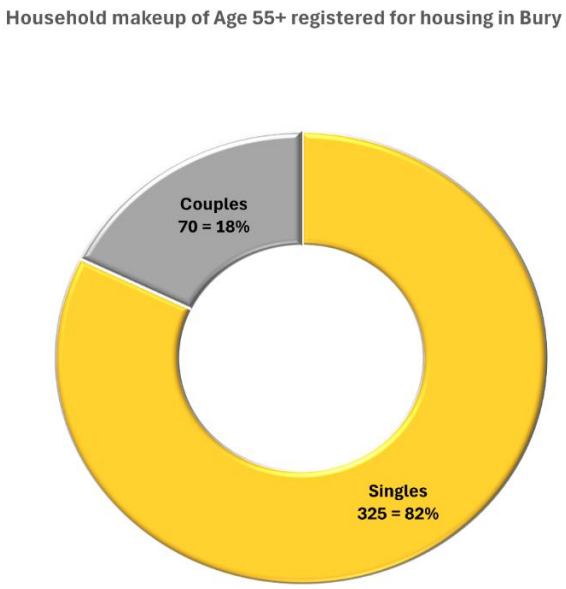
PRIORITY 4 - Develop strong relationships between housing providers and care providers, to strengthen partnership working ensuring the needs and aspirations of tenants living in extra care are met to promote health, wellbeing, and independence.

Demand

Data taken from Bury Council's housing register in November 2025 shows the total number of people over the age of 55 years registered for housing in Bury was 465. The chart below shows the age profile of this group broken down. Although not all people over the age of 55 years will want or need extra care housing, we can assume that a proportion may consider extra care housing, particularly those over the age of 65 and 75 years.

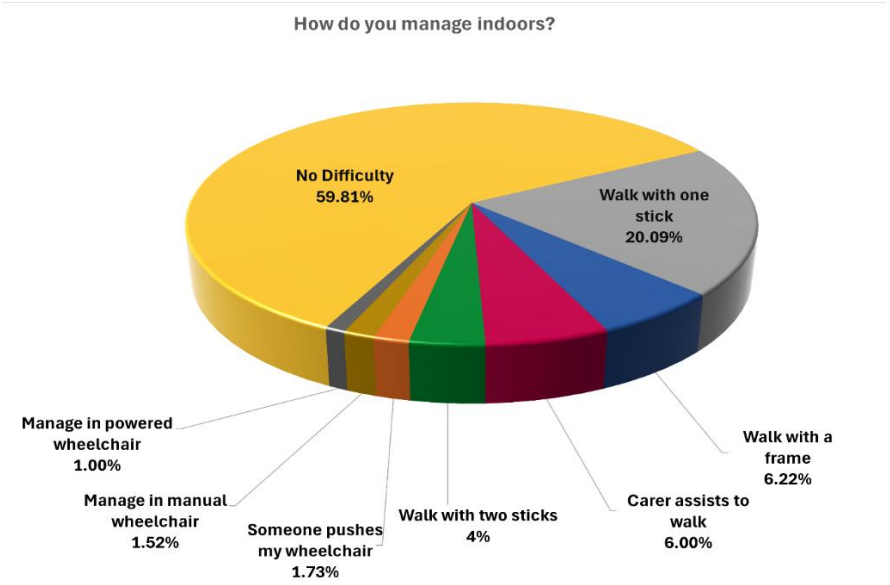


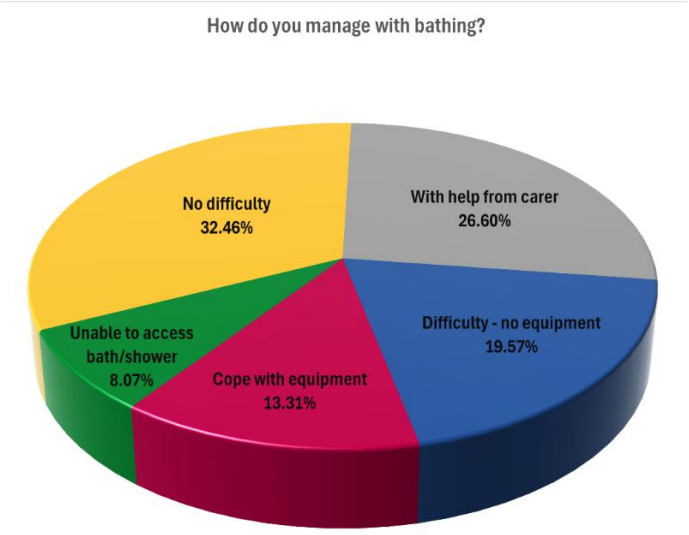
The chart below shows the number of couples and singles over age 55 years currently registered for housing. This is important data because it highlights demand for both 1 and 2 bedroom extra care units.



The two charts below show how the 465 people over the age of 55 on the housing register manage indoors and when bathing. This information highlights the need for accessible housing options for older people and the importance of building extra care

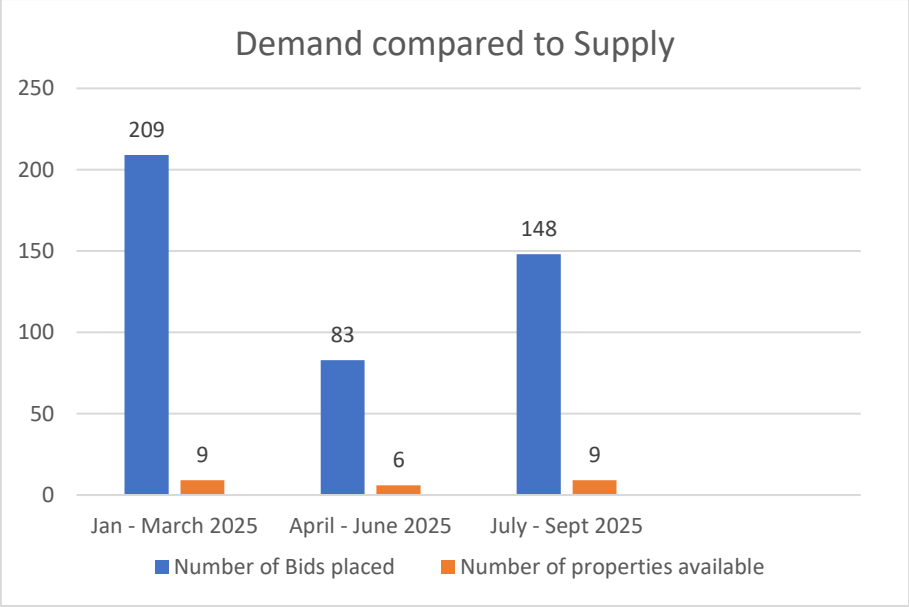
housing schemes to the HAPPI design standards ensuring older people can remain in their home as they age.





The chart below shows the number of properties that were available at each extra care housing scheme in Bury and the number of bids placed during the period January 2025 to September 2025. This data shows us that the current supply of extra care housing in Bury is not meeting demand.

It should be noted that some people may place multiple bids on schemes each week, therefore each count is not representative of one person although this chart does provide insight into the demand for extra care housing in Bury.



The Adult Social Care - Housing for Those with Additional Needs Strategy 2021 – 2025 states that given the current population needs, trends, spends and the future population projections, Bury will need more capacity c.210 beds/units of extra care housing by 2030, rising to c.330 beds/units by 2035.

It also states that over the period 2022 to 2043 there is a need for 41 additional extra care units each year.

Based on this, data taken from Bury Council's Housing Register, local population figures, and consultation with key-stakeholders, we conclude that demand for extra care housing in Bury is greater than supply and therefore we plan to develop up to 5 new extra care housing schemes in Bury by 2035. The majority of these will likely be owned by Bury Council or Registered Providers of Social Housing to meet the demand of people on the social housing register.

It should be noted that this strategy does not include considering future demand for private outright ownership for extra care accommodation. However, there is a need to consider shared ownership and mixed tenure schemes.

We will ensure that our increased extra care supply will comprise of a range of both specialist and general needs accommodation. We will aim to include a mix of one- and two-bedroom apartments, and this could range from between 30 to 80+ properties on one site.

Further considerations gathered in consultation with older people on this strategy highlight the importance of ensuring that older people have information and understand how to access extra care housing. We will ensure that this is considered in the development of priorities 5 and 6 detailed below.

PRIORITY 5 - Review the approach to extra care housing allocations; ensuring it is fit for purpose, clear, transparent and aligned to Bury's general needs social housing allocation policy. In addition, this will enable us to facilitate downsizing and free up social housing stock effectively.

PRIORITY 6 – Introduce extra care housing waiting lists using the Adult Social Care Liquid Logic Case Management System to monitor need and demand going forward. Through effective marketing we will raise public and workforce awareness of extra care housing in Bury to allow people to plan for housing in later life.

PRIORITY 7 - Work with our registered housing provider partners to agree a commitment to support and plan the development of up to 5 new extra care housing schemes in Bury by 2035, ensuring that provision is developed in at least 2 of the following areas: Prestwich, Whitefield, Tottington, Ramsbottom. Ensure there is capacity within the adult social care market to deliver the care and support required for these schemes.

5. BEST PRACTICE AND RESEARCH

Benefits of Extra Care Housing

Purpose-built extra care housing can cater for the specific needs of older people as they age, alongside management and delivery of care and support as and when needed. It also plays a significant role in tackling loneliness and social isolation supporting people to remain socially active and part of a community, helping to improve physical and mental wellbeing.

As resident's can be provided with care and support and because their homes are built to the HAPPI Design Principles, they are able to continue to live in their homes and the community as they age, which may reduce and delay the need for residential care and hospital admissions. Promoting the use of assistive technology can also further enhance the independence and safety of residents in extra care housing.

As people often move from family homes into extra care housing, the model can also help strengthen the local housing market and the social rented sector, by freeing up family homes for younger families or first-time buyers.

An Extra Care Housing Resources Pack was developed for the Greater Manchester Health and Social Care Partnership in 2019, and this highlights the financial cost benefits of extra care housing for the individual and also the wider health and social care system:

- There is evidence to suggest that extra care housing can delay admission into a care home by providing alternative accommodation at the point where someone has to leave their original home and as a means of enabling them to live independently for longer.
- Care needs often reduce after someone goes into extra care housing due to on-site care provision and living in accessible accommodation.

- A detailed evaluation completed by East Sussex Council indicates that 63% of people living in their schemes would be placed in residential care or nursing care if they were not living in extra care housing. **This study concluded that the cost of extra care housing was on average half the gross cost of the alternative placements.**
- Research commissioned by Southampton City Council identified a range of health benefits and specifically cost benefits to the health system derived from older people living in extra care housing. For example, reductions in the number of GP visits, reductions in the number of community nurse visits, and reductions in the number of non-elective admissions to hospitals. This research has also found that living in a housing with care scheme can improve residents' general wellbeing.

The table below demonstrates that an older person living in extra care housing generates health and social care cost-benefits of £2,441 per annum:

Area of Cost Benefit/ Saving	**Cost benefit/saving (per extra care housing resident per year)**
GP visits	£144.78
Community Nurse Visits	£362.55
Non-elective admissions to hospital	£624.11
Delayed Transfer of Care 'days'	£465.30
Falls	£380.00
Reduction in scale of care home packages	£427.98
Reduced loneliness	£36.30
TOTAL	**£2,441.02**

PRIORITY 8 – Complete a detailed local cost benefit analysis of capital and revenue of current extra care housing schemes to inform future development intentions and design specifications.

What does 'good' Extra Care Housing look like?

The research below related to national principles, standards, guidance, and best practice has been taken into consideration during the development of our commissioning priorities and intentions for this strategy.

For Bury to develop quality extra care housing provision it is important that we adopt expert opinions by reputable organisations and interlink them with commissioning and capital intentions. Furthermore, we have carried out extensive research to consider best practice and lessons learnt from local, national and international models of extra care housing schemes.

HAPPI Design Principles (2009): The HAPPI principles are based on 10 key design criteria. Many are recognisable from good design generally - good light, ventilation,

room to move around and good storage - but they have relevance to the spectrum of older people's housing which needs to both offer an attractive alternative to the family home and be able to adapt over time to meet changing needs.

National Design Guide (2019): This guide sets out the characteristics of well-designed places and demonstrates what good design means in practice highlighting the need for well-designed, accessible homes that are socially inclusive, healthy, meet the housing needs of an ageing population and the importance for the need for greater flexibility in design to meet changing needs, including changes in health and mobility of older people.

Department for Communities & Local Government Technical Housing Standards (2015): This document details nationally described space standards. It sets out requirements for the Gross Internal (floor) Area of new dwellings at a defined level of occupancy as well as floor areas and dimensions for key parts of the home. The nationally described space standard for one bedroom one person dwellings is 37m2 for general needs housing.

Design Principles for Extra Care Housing (3rd edition) Housing LIN factsheet (2020): This report refers to good practice in terms of housing for older people being characterised by providing sufficient space to accommodate the accessibility requirements of people as their needs change with age. This document describes the three categories for accessibility in the National Building Regulations. These have been used to develop the space provision and specification named **Wheelchair Lite Standard.**

The "Older People's Housing Preferences" report by Ipsos and Housing LIN, December 2024: This report explores the housing needs and preferences of the UK's older population, key findings include:

- 5,591 respondents aged 50 and over, with a majority being homeowners, a significant portion reported physical or mental health conditions and lower incomes. Around 29% of respondents are concerned about their physical health, and 13% are concerned about their mental health. These concerns are higher among those aged 75+, renters, those from ethnic minority backgrounds, and those with lower incomes.
- One-third of older adults are likely to move home only when they develop health problems. This tendency is more pronounced among those aged 75+.
- Most older adults live in conventional homes, with a majority in properties with three or more bedrooms. Many have lived in their homes for over 20 years.
- Over 80% are satisfied with their current homes, valuing safety, location, and size. However, concerns about future suitability and heating costs are prevalent.
- While many homes lack adaptations, a significant number of older adults do not plan to make changes. Those with adaptations often have features like downstairs bathrooms and step-free access.
- Most older adults prefer to stay in their current homes, with or without adaptations. If moving, bungalows are the most preferred type of housing.

- Emotional attachments, complexity, and costs are major barriers to moving. Financial concerns are particularly significant for renters and those with lower incomes.
- The report highlights the need for age-friendly housing policies, financial support for home adaptations, and the development of affordable, accessible housing options to meet the diverse needs of the ageing population.

PRIORITY 9 - Co-produce a set of 'Extra Care Housing Standards' to define what Bury residents can expect from the extra care housing offer. This will include ensuring that existing and new extra care housing schemes offer digital capacity and infrastructure to provide access to technological advances to promote independence and wellbeing. The Community Commissioning Division has developed a Co-production Charter that will be the reference for co-production activity.

APPG on Housing and Care for Older People Inquiry on regenerating outdated sheltered housing (launched April 2023). This Inquiry considers how best to regenerate existing supply of outdated sheltered housing – including modernisation, repurposing, and replacing older stock and service models.

Refurbishing or remodeling sheltered housing: a checklist for developing Extra Care by Housing LIN (2005): This factsheet provides a framework for decision making when considering developing extra care housing from sheltered stock exploring the following options:

- Refurbish an existing ordinary sheltered housing scheme.
- Re-model / reconfigure existing ordinary sheltered housing scheme
- Repurpose the building.
- Demolish and build new on the same site.
- Demolish and build new on a different site.
- Undertake more preparatory work.
- Consider other ways of delivering housing with support.

The Regeneration of Outdated Sheltered Housing (2024): this report found that the scale of re-investment required across sheltered housing is significant. It highlights the need to upgrade and regenerate outdated sheltered housing for older people.

Key recommendations from the report include:

- A significant proportion of sheltered housing should be refurbished; attractive and contemporary sheltered housing can continue to enable down-sizing that allows families to obtain much-needed homes.
- Homes England capital grant funding rules should ensure that housing providers can apply for and use capital grant to refurbish and upgrade existing sheltered housing schemes without 'additionality' requirements.

- Local authorities should undertake periodic Older Persons' Housing Needs Assessments to determine local need and demand for all types of housing for older people, including sheltered housing.
- All social and private landlords with sheltered housing stock should conduct a strategic review of their portfolio's current and future suitability, identifying options for refurbishment/upgrades, repurposing or replacement
- Disposals/sales should be avoided where possible. Both the Regulator of Social Housing, as part of its new standards regime, and all social housing providers should adopt a 'charter for disposal of supported accommodation for older people'.

PRIORITY 10 - In Bury we will ensure that the review of sheltered accommodation is aligned to this Extra Care Housing Strategy to ensure that consideration is given to regenerating old, outdated stock where possible to develop new extra care provision.

Below are our ten commissioning priorities and intentions for the next 10 years:

- **PRIORITY 1** - Engage with networks across the borough, such as the Bury Older People's Network, the Voluntary and Faith Sector and other community groups, to ensure the needs and aspirations of our communities are heard and understood.

- **PRIORITY 2** – Recognise that people have different needs based on characteristics and circumstances. Continue to work with communities of identity to ensure we deliver inclusive and accessible services.

- **PRIORITY 3** - Ensure existing extra care housing schemes that are registered with Care Quality Commission (CQC) are inspection ready, by ensuring the Community Commissioning Team completes the Quality Assurance Framework.

- **PRIORITY 4** - Develop strong relationships between housing providers and care providers, to strengthen partnership working ensuring the needs and aspirations of tenants living in extra care are met to promote health, wellbeing, and independence.

- **PRIORITY 5** - Review the approach to extra care housing allocations; ensuring it is fit for purpose, clear, transparent and aligned to Bury's general needs social housing allocation policy. In addition, this will enable us to facilitate downsizing and free up social housing stock effectively.

- **PRIORITY 6 –** Introduce extra care housing waiting lists using the Adult Social Care Liquid Logic Case Management System to monitor need and demand going forward. Through effective marketing we will raise public and workforce awareness of extra care housing in Bury to allow people to plan for housing in later life.

- **PRIORITY 7** - Work with our registered housing provider partners to agree a commitment to support and plan the development of up to 5 new extra care housing schemes in Bury by 2035, ensuring that provision is developed in at least 2 of the following areas: Prestwich, Whitefield, Tottington, Ramsbottom. Ensure there is capacity within the adult social care market to deliver the care and support required for these schemes.

- **PRIORITY 8** – Complete a detailed local cost benefit analysis of capital and revenue of current extra care housing schemes to inform future development intentions and design specifications.

- **PRIORITY 9** - Co-produce a set of 'Extra Care Housing Standards' to define what Bury residents can expect from the extra care housing offer. This will include ensuring that existing and new extra care housing schemes offer digital capacity and infrastructure to provide access to technological advances to promote independence and wellbeing. The Community Commissioning Division has developed a Co-production Charter that will be the reference for co-production activity.

- **PRIORITY 10** - In Bury we will ensure that the review of sheltered accommodation is aligned to this Extra Care Housing Strategy to ensure that consideration is given to regenerating old, outdated stock where possible to develop new extra care provision.

7. DELIVERY OF THE EXTRA CARE HOUSING STRATEGY 2026 - 2036

How will we know we are achieving our Commissioning Priorities & Intentions?

The ownership for delivery and governance of this strategy will sit with Bury Council's 'Extra Care Housing Delivery Group'. The group will develop an action plan and will regularly review progress on the actions required to achieve our 10 commissioning priorities and intentions.

The Community Commissioning Division will submit a bi-annual highlight report to the following groups to report on progress and escalate any risks identified to delivering our commissioning priorities and intentions for extra care housing in Bury:

- Adult Social Care Senior Leadership Team
- Older People and Ageing Well Partnership Board
- Housing Services Senior Leadership Team
- Housing Growth Group
- Housing Advisory Board

GLOSSARY

Term	Meaning
Registered Housing Provider	A registered housing provider is an organisation that is registered with the regulator of social housing and provides social housing as a landlord – they are typically non-for-profit housing associations but can also include Local Authorities and profit-making organisations.
Commissioner	Officer of the Local Authority responsible for ensuring the right services are in place to meet the needs of the local population.
Developer	A person or company that builds or refurbishes properties to agreed standards.
Shared Ownership	Shared ownership is a way to buy a home where you purchase a share of the property and pay rent on the remaining portion to a housing association, you essentially become a part owner and part tenant.
HAPPI Design Principles	A set of 10 design criteria focused on creating homes and communities that are both attractive to older people and adaptable to their changing needs.
Census	Census data is a count of all people and households within a specific area, taken at regular intervals, it provides a detailed snapshot of the local population and demographics.
LGBTQIA+	Lesbian, Gay, Bisexual, Transgender, Queer or questioning, Intersex and Asexual – plus (+) signifies that it is an inclusive term that also encompasses other non-binary gender identities and sexual orientations not explicitly listed.
Carer	A person, of any age, who provides unpaid care and support to a family member, friend or neighbour who is disabled, has an illness or a long-term condition or who needs extra help as they grow old.
BAME	Black, Asian and Minority Ethnic groups.

Unit	A self-contained living space typically including a kitchen, bathroom and toilet. It is essentially a dwelling or living space that can be occupied independently for example flats / apartments / bungalows.
LATCO (Local Authority Trading Company)	Organisations that are free to operate as commercial companies but remain wholly owned and controlled by the council.
CQC (Care Quality Commission)	An Independent regulator in England that ensures the quality and safety of health and social care services.
Housing Allocations Policy	A document that all councils are required to have for determining the priorities and procedures to be followed in allocating housing accommodation.
Liquid Logic	An electronic case management system used to store data relating to adult social care.
Market Position Statement	A document created by local authorities to provide information about the adult social care market within their area.
Assistive Technology	A digital item, piece of equipment, program or product used to increase, maintain or improve a person's functional capabilities, safety and independence.
Non-elective admission to hospital	Unplanned admissions for treatment that are needed at short notice due to clinical need.
Delayed transfer of care 'days'	The number of days a patient, who is medically ready to leave the hospital, remains in a hospital bed due to factors outside the hospital's control.
Cost Benefit Analysis	A process used to evaluate the advantages and disadvantages of a project / approach by comparing costs and benefits in monetary terms.
Capital	In the context of housing this refers to funding allocated for the building of homes.
Revenue	In the context of Adult Social Care this refers to funding allocated for service provision associated with care and support needs.
Housing LIN (Learning and Improvement Network)	A network and consultancy community focused on promoting wellbeing through

	good quality housing, particularly for older people, people with disabilities, and those with care needs.
Co-production	An approach used to develop public services involving people who use services in an inclusive and meaningful way working together.
Stock	Refers to the number of properties (houses, flats, apartments, bungalows etc) owned by a landlord.
Bury Older Peoples Network (BOPN)	An engagement mechanism for older people to have their voices heard on things that matter to them.
M4 (2) Building Regulations	M4(2) refers to the requirements for accessible and adaptable dwellings under the Building Regulations in England. It ensures that new dwellings are designed to be easily accessed and adapted for future use, particularly for individuals with disabilities. Key requirements include: • Accessible Entrances • Clear Access Zones • Design for Adaptability

Bury
Council

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Equality Impact Analysis

This equality impact analysis establishes the likely effects both positive and negative and potential unintended consequences that decisions, policies, projects and practices can have on people at risk of discrimination, harassment and victimisation. The analysis considers documentary evidence, data and information from stakeholder engagement/consultation to manage risk and to understand the actual or potential effect of activity, including both positive and adverse impacts, on those affected by the activity being considered.

To support completion of this analysis tool, please refer to the equality impact analysis guidance.

Section 1 – Analysis Details (Page 5 of the guidance document)

Name of Policy/Project/Decision	Extra Care Housing Strategy 2026-2036
Lead Officer (SRO or Assistant Director/Director)	Adrian Crook (Director of Adult Social Services and Community Commissioning)
Department/Team	Health and Social Care - Community Commissioning Division
Proposed Implementation Date	January 2026
Author of the EqIA	Stephanie Boyd and Victoria Crookes (Commissioning Managers)
Date of the EqIA	15 December 2025

1.1 What is the main purpose of the proposed policy/project/decision and intended outcomes?

Summary

'Extra care' housing are developments that comprise of self-contained homes with design features and support services available to enable self-care and independent living. This model has a variety of forms, and services may be designed to meet the needs, demand and aspirations of local communities.

This housing model is particularly attractive to older people, as it allows them to maintain their independence while having access to the care and support services they may need as they age.

From an Adult Social Care perspective, there is a recognition that we must have a range of housing options for older people who need support to live well in their communities, to enable them to maintain their independence and exercise choice and control for as long as they are able to do so.

The Community Commissioning Division has produced this strategy to outline to our partners:

- The strategic context in which we are working
- The current 'extra care' housing market in Bury
- Our commissioning priorities and intentions for extra care housing from 2026 to 2036

Section 2 – Impact Assessment (Pages 6 to 10 of the guidance document)

2.1 Who could the proposed policy/project/decision likely have an impact on?

Employees: **Yes**
Community/Residents: **Yes**
Third parties such as suppliers, providers and voluntary organisations: **Yes**

If the answer to all three questions is 'no' there is no need to continue with this analysis.

2.2 Evidence to support the analysis. Include documentary evidence, data and stakeholder information/consultation

Documentary Evidence:

A range of research exercises have been completed, including linkage to the below key strategic plans and data sets to ensure the Strategy aligns to the wider objectives of Bury Council:

- Let's Do It… Bury 2030 Strategy
- Bury Housing Strategy 2021 to 2025
- Bury Adult Social Care - Housing for Those with Additional Needs Strategy 2021 – 2025
- Bury Draft Local Plan
- Bury Market Position Statement 2025 -2027 Older People, Ageing Well & Dementia
- Bury Joint Strategic Needs Assessment
- Bury Draft Health and Adult Care Ageing Well Strategy 2025 – 2030
- Bury Prevention and Wellbeing Strategy - Health and Social Care 2025-2030
- Bury Equality, Diversity, and Inclusion Strategy 2024 – 2028
- Bury Adult Carers Strategy 2025-2029
- Bury Sensory Impairment Strategy 2025 to 2029
- Bury Dementia Strategy 2024 to 2029
- Bury Council Housing Register
- Several local and national documents outlining principles, standards, guidance, and best practice

Data:

Protected Characteristic	Bury Population Data (from the JSNA in November 2025 unless stated otherwise)	Extra Care Resident Data (December 2025)
Age	Bury has 114,526 (59.1%) working age adults (18-64 years). There are 35,447 (18.3%) older adults in Bury (65 years and over).	In extra care housing there are 33 (20%) working age adults (18-64 years). There are 132 (80%) older adults (65 years and over).
Disability	19% of the population report having a disability.	67.8% report have a disability.

Gender Reassignment	The question on gender identity was new for Census 2021. It was a voluntary question only asked of those aged 16 years and over. The question asked, "Is the gender you identify with the same as your sex registered at birth?" with 3 answer options of Yes, No or to write in their gender identity. 94.4% of the population aged 16 years and over in Bury answered Yes.	No data available.
Marriage and Civil Partnership	45.3% of the population are married or in a civil partnership (2021 census data – Office of National Statistics).	20.6% are married or in a civil partnership.
Race	White groups – 81% Mixed – 2.9% Asian – 9.7% Black – 4.2% Others – 2.2%	White groups – 88.4% Black – 1.2% Others – 10.3%
Religion and Belief	Buddhist - 0.3% Christian – 48.8% Hindu – 0.5% Jewish – 5.5% Muslim – 9.9% Sikh – 0.3% Other religion – 0.3% No religion – 29.4% Not answered – 5%	Christian – 61.2% Other religion – 2.4% No religion – 21% Not answered – 15.4%
Sex	The population of Bury is 51% female and 49% male.	52.7% female and 42.7% male. Unknown 4.6%

Sexual Orientation	The question on sexual orientation was new for Census 2021 and was voluntary only asked of those aged 16 years and over: Heterosexual/Straight – 90.6% Gay/Lesbian – 1.6% Bisexual – 1% All other sexual orientations – 0.3% Not answered – 6.5%	Heterosexual/Straight – 80.6% Gay/Lesbian – 1% Not known – 12.2% Refused to answer – 6%
Carers	The percentage of people providing unpaid care in Bury is 9.3%.	Limited data.
Socio-economically vulnerable	52.5% of households are deprived in at least one of the dimensions described: Household Deprivation | Bury Directory	No data available.
Veterans	The percentage of people who have previously served in any UK armed forces in Bury is 3.3%.	No data available.

Stakeholder information/consultation:

The Community Commissioning Division has developed this strategy by consulting with the following stakeholders who have contributed to shaping the document and agreeing its 10 priorities:

- Bury Older People's Network (BOPN)
- Bury Older People and Ageing Well Partnership Group
- Bury Extra Care Housing Steering Group
- Bury Registered Housing Provider Partnership Framework
- Bury Housing Growth Group
- Healthwatch Bury
- Age UK Bury
- Bury Voluntary Community and Faith Alliance (VCFA)
- Several Bury Council Departments including Adult Social Care, Housing Services, and Planning Department

- Local Councillors

Over summer 2025, face-to-face conversations took place, and an online survey was available for stakeholders to provide feedback.

More recently, a 4-week public consultation was published on the Council's consultation page running from 27th October until 21st November 2025.

We will continue to consult with and involve the above groups to co-deliver our priorities and ensure our work considers the needs and aspirations of our older population, future generations, and diverse communities.

2.3 Consider the following questions in terms of who the policy/project/decision could potentially have an impact on. Detail these in the impact assessment table (2.4) and the potential impact this could have.

- Could the proposal prevent the promotion of equality of opportunity or good relations between different equality groups?
- Could the proposal create barriers to accessing a service or obtaining employment because of a protected characteristic?
- Could the proposal affect the usage or experience of a service because of a protected characteristic?
- Could a protected characteristic be disproportionately advantaged or disadvantaged by the proposal?
- Could the proposal make it more or less likely that a protected characteristic will be at risk of harassment or victimisation?
- Could the proposal affect public attitudes towards a protected characteristic (e.g. by increasing or reducing their presence in the community)?
- Could the proposal prevent or limit a protected characteristic contributing to the democratic running of the council?

2.4 Characteristic	Potential Impacts	Evidence (from 2.2) to demonstrate this impact	Mitigations to reduce negative impact	Impact level with mitigations Positive, Neutral, Negative
Age	We have an ageing population and the demand for extra care housing is likely	As expected, a disproportionate cohort of older people are more likely to live in extra care housing.	We aim to create a range of housing options for older people who need support to live well in their communities, to	Positive.

	to increase going forwards.		enable them to maintain their independence and exercise choice and control for as long as they are able to do so. As people often move from family homes into extra care housing, the model can also help strengthen the local housing market and the social rented sector, by freeing up family homes for younger families or first-time buyers.	
Disability	People are living longer but not always in good health. Some people will develop care needs as a result of disabilities.	As expected, a disproportionate cohort of people with disabilities are more likely to live in extra care housing.	Properties should be designed and built to standards that mean should a person's needs increase overtime then aids and adaptations can be installed at their property and care and support provided to	Positive.

			ensure their needs can be met.	
Gender Reassignment	No identified impact.	Data unavailable.	N/A	Neutral.
Marriage and Civil Partnership	Risk of couples being split up if one of them develops care needs.	Whilst there are some variations between Bury population data and Extra Care Customer data there is nothing to suggest a significant disproportionate impact.	If people are living together as a couple, and one of them has care needs, the extra care housing model could make it possible for them to continue to live together.	Neutral.
Pregnancy and Maternity	No identified impact.	N/A	N/A	Neutral.
Race	Risk of people being isolated from the community they are part of.	Whilst there are some variations between Bury population data and Extra Care Customer data there is nothing to suggest a significant disproportionate impact.	It is important that housing options for older people are reflected in location and service delivery. Therefore, there will be consultation practices for specific localities to identify opportunities.	Neutral.
Religion and Belief	Risk of people being segregated from their places of worship and/or congregation.	Whilst there are some variations between Bury population data and Extra Care Customer data there is nothing to suggest a	As a culturally rich borough, it is important that extra care provisions reflect the cultural needs of localities, especially for	Neutral.

		significant disproportionate impact.	our Jewish and Muslim residents. Therefore, there will be consultation practices with the faith sector. We will ensure that provision is developed in at least 2 of the following areas: Prestwich, Whitefield, Tottington, Ramsbottom.	
Sex	No identified impact.	Whilst there are some variations between Bury population data and Extra Care Customer data there is nothing to suggest a significant disproportionate impact.	N/A	Neutral.
Sexual Orientation	No identified impact.	Whilst there are some variations between Bury population data and Extra Care Customer data there is nothing to suggest a significant disproportionate impact.	N/A	Neutral.
Carers	No identified impact.	Limited data.	N/A	Neutral.
Looked After Children and Care Leavers	No identified impact.	N/A	N/A	Neutral.

Socio-economically vulnerable	Data from the Council's Housing Register shows us that current supply of extra care housing in Bury is not meeting demand.	Data unavailable.	This strategy will ensure affordable housing options for our ageing population. This will include older people that are able to pay their own rent, or those that are eligible for Housing Benefit.	Neutral.
Veterans	No identified impact.	Data unavailable.	N/A	Neutral.

Actions required to mitigate/reduce/eliminate negative impacts or to complete the analysis

2.5 Characteristics	Action	Action Owner	Completion Date
N/A			

Section 3 - Impact Risk

Establish the level of risk to people and organisations arising from identified impacts, with additional actions completed to mitigate/reduce/eliminate negative impacts.

3.1 Identifying risk level (Pages 10 - 12 of the guidance document)

Impact x Likelihood = Score	Likelihood			
	1	2	3	4

			Unlikely	Possible	Likely	Very likely
Impact	4	Very High	4	8	12	16
	3	High	3	6	9	12
	2	Medium	2	4	6	8
	1	Low	1	2	3	4
	0	Positive / No impact	0	0	0	0

Risk Level	No Risk = 0	Low Risk = 1 - 4	Medium Risk = 5 – 7	High Risk = 8 - 16

3.2 Level of risk identified	Low risk
3.3 Reasons for risk level calculation	A low risk level has been calculated for the recommendation to approve the Extra Care Housing Strategy and agree that the ownership for delivery and governance is with Bury Council's Extra Care Housing Delivery Group The reasons for the low risk are: ➢ The ownership for delivery and governance of this strategy will sit with Bury Council's 'Extra Care Housing Delivery Group'. The group will develop an action plan and will regularly review progress on the actions required to achieve our 10 commissioning priorities and intentions. ➢ The Community Commissioning Division will submit a bi-annual highlight report to the following groups to report on progress and escalate any risks identified to delivering our commissioning priorities and intentions for extra care housing in Bury: • Adult Social Care Senior Leadership Team

	• Older People and Ageing Well Partnership Board • Housing Services Senior Leadership Team • Housing Growth Group • Housing Advisory Board

Section 4 - Analysis Decision (Page 11 of the guidance document)

4.1 Analysis Decision	X	Reasons for This Decision
There is no negative impact therefore the activity will proceed		
There are low impacts or risks identified which can be mitigated or managed to reduce the risks and activity will proceed	x	The main risk for the work is lack of ownership and delivery for the strategy and priorities; however, mitigations (as above) are in place for this. No negative impact identified relating to equalities.
There are medium to high risks identified which cannot be mitigated following careful and thorough consideration. The activity will proceed with caution and this risk recorded on the risk register, ensuring continual review		

Section 5 – Sign Off and Revisions (Page 11 of the guidance document)

5.1 Sign Off	Name	Date	Comments
Lead Officer/SRO/Project Manager			
Responsible Asst. Director/Director			
EDI	L. Cawley	17/12/25	QA Complete: The analysis has identified impacts across many characteristics which this strategy seeks to address and fully mitigate. Most impacts are neutral however some are likely to have a positive outcome based on age and disability. The

			characteristics most likely to be in need of extra care accommodation.

EqIA Revision Log

5.2 Revision Date	Revision By	Revision Details

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Agenda Item 14

Classification:	Decision Type:
Open	Non-Key

Report to:	Cabinet	**Date:** 15 January 2026
Subject:	Six Town Housing LTD and Bury Housing Services SLA	
Report of	Cabinet Member for Housing Services	

Summary

1. This report deals with the contractual requirements to continue the delivery of Housing management to Six Town Housing Limited from 1st February 2026 to 31st January 2027.

2. After it ceased to be the Council's ALMO, Six Town Housing Limited (STH) entered into a service level agreement with Bury Council in July 2024 so that STH could continue to execute its responsibilities as a social landlord to its then remaining 149 properties.

3. The current SLA expires on 31st January 2026 and in order to ensure the tenants have continuity of service it is recommended to approve a 12-month extension of the arrangement.

Recommendation(s)

4. To delegate to the Director of Law and Democratic Services the preparation and signing of the variation instruments to extend the provision of Council Services to Six Town Housing from 1/2/26.

Reasons for recommendation(s)

5. STH no longer performs the ALMO function for the Council but it continues as an active Private Registered Provider of Social Housing company now owning and leasing just 115 social housing homes which it lets and sublets to its own social housing tenants. STH no longer employs staff, is managed solely by its Board, and wholly relies on the Council for services.

6. Therefore, an ongoing Service Level agreement is required so STH may continue with its reduced social housing activities relying on the support of the Council.

7. Cabinet agreed to begin the process of dissolving STH on the 9th September 2025. This process will take at least 18 months. During this time, consistent management of the properties will ensure stability for the organisation and tenants.

Alternative options considered and rejected

8. The option to "do nothing" is not appropriate since STH corporate governance arrangements must provide for and align with STHs significantly reduced role and activities post cessation of ALMO.

Report Author and Contact Details:

Name: Esme Davies
Position: Programme Manager – Housing
Department: Delivery Unit
E-mail: esme.davies@bury.gov.uk

Background

9. On 1st February 2024 STH ceased managing the Council's housing stock and so ceased its role as an ALMO. However, STH remains intact as a wholly owned subsidiary company of the Council and is itself a Private Registered Provider of Social Housing now owning and leasing 115 social housing homes which it lets and sublets to its own social housing tenants under the assured tenancy regime governed by the Housing Act 1988.

10. STH no longer has any paid staff, is managed solely by its Board, and therefore required arrangements in order to deliver its social housing responsibilities. Under the Transfer and Termination (T&T) agreement the parties agreed to deliver and receive the "Council Services" to STH which were further outlined in the Operational Plans and SLA.

11. The T&T (including its Operational Plans & SLA) provides assurance for the delivery of Council Services to properly manage STH's social housing tenancies, properties and maintain its regulatory compliance. STH may be required to share this Operational Plans & SLA with the Regulator to demonstrate it has sufficient contracts and controls in place to comply with its regulatory obligations.

Service Level Agreement

12. A formula to calculate charges were introduced in the provisions for 2025/26 that reflected the activities Bury Housing Services undertook on behalf of Six Town Housing. The formula will be reviewed for the extension with Bury Housing Services and Six Town Housing Board to ensure it is still appropriate. The SLA allows for further charges to be raised at the approval of the STH chair.

13. Due to the Mosscare St Vincent lease ending in September 2025 and the hand back of 34 properties to the landlord, the number of properties that Bury Housing will service has reduced to 115. It is proposed to reflect this change

in a reduction in housing officer time allocated to the management fee.

14. Bury Housing and STH Board agreed a value of £100,850 for the 2025-26 “annual block charge” for the standard day-to-day company and housing management services. (In addition to this shall be separate “spot charges” for infrequent one-off expenditure/services that are to be agreed in advance with the Chair of STH . It is proposed to maintain the formula but reflect the 3.4% salary uplift applied to all staff at Bury Council for 2025-26 for the delivery of services.

Future of Six Town Housing

15. As per the cabinet decision in September 2025 the council has begun the process to close STH. This process is expected to take at least 18 months covering the period of the proposed SLA extension. There is an expectation that an SLA will be required for at least some part of 2026-27 and that will be brought to cabinet at the appropriate time.

Links with the Corporate Priorities:

16. This proposal meets the corporate priorities in the following ways:
    a. Local
    b. Sourcing local housing options for local people
    c. Prevent the need for Bury residents to have to move out of the borough to have their needs met.
    d. Work with local developer's and providers who know the local area.
17. Enterprise
    a. Enterprising innovation and creative solutions to current housing issues.
    b. Be bold in our housing solutions and future developments in Bury.
18. Together
    a. Working together to design quality, fit for purpose homes for people with additional needs in Bury.

Equality Impact and Considerations:

19. There are no material changes or impacts on people therefore no equality impact concerns with this activity.

Environmental Impact and Considerations:

20. There are no material impacts from this decision. Sustainability works are delivered outside of the SLA to STH properties.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
Tenants are not consulted on delivery of services	SLA is for only for one year to ensure meets guidelines for long term arrangements
Tenants do not receive services in line with regulator of social housing	SLA provides services in line with Bury Council Tenants.

Legal Implications:

21. STH is a subsidiary company of the Council which is also a Private Registered Provider of Social Housing ("RP") providing 115 social housing homes in the district. It no longer has any staff and is managed solely by its Board. It relies exclusively on the Council for the delivery and/or procurement of all its services necessary for it to provide compliant and safe homes as per the Regulator of Social Housing's Regulatory Framework.

22. Legal Services prepared a suite of legal instruments now in place between STH and the Council to ensure STH can continue to provide compliant homes and services to its tenants. These included the "Operation Plans and Service Level Agreement" that provide for the relevant service delivery and charges. This report seek approval to extend those provisions for a further year and at the charges specified in the report.

23. Previously this contract for services fell outside the procurement rules since no charges were made or paid. Now charges are being introduced then this amounts to a below threshold procurement. STH is subject to the Council's Contract Procedure Rules (CPRs). The CPRs permit STH to directly award this contract for services to the Council on the grounds that these are "*additional services where change in supplier would result in disproportionate technical difficulties in operation or maintenance of the service*". This is because STH is operated on Council systems and uses the services of staff who were previously employees of STH and whose roles cover servicing Council stock and STH stock simultaneously. To separate the systems and service delivery would, in view of the modest charges being made, result in disproportionate technical difficulties in operation or maintenance of the service.

Financial Implications:

24. The financial implications are outlined in the report.

Appendices:

None.

Background papers:

None.

Please include a glossary of terms, abbreviations and acronyms used in this report.

Term	Meaning

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Agenda Item 15

Classification:	Decision Type:
Open	Non-Key

Report to:	Cabinet	**Date:** 15 January 2026
Subject:	Youth Justice Business Plan 2025 – 2026	
Report of	Deputy Leader and Cabinet Member for Children and Young People	

Summary

The legislative requirement for a Youth Justice Business Plan in England and Wales is set out in Section 40 of the Crime and Disorder Act 1998. This law mandates that: each local authority, in consultation with its statutory partners (police, health, probation, and others), must formulate and implement an annual Youth Justice Plan. The plan must detail: How youth justice services (YJSs) will be provided and funded: How they will operate, including staffing and partner services: What functions they will carry out, including prevention of offending and reduction of reoffending.

Our Youth Justice Business Plan 2025- 2026 has been approved by the Youth Justice Partnership Management Board, and the Youth Justice Board. As a legislative requirement the Ministry of Justice grant is given to us on condition that this plan is completed and implemented.

The plan must be approved by the full council (in England) under Regulation 4 of the Local Authorities (Functions and Responsibilities) (England) Regulations 2000.

Recommendation(s)

The plan has been submitted for approval, as expected statutorily and to make Cabinet aware of the priorities, performance, issues and risks for the Youth Justice Services over the coming year (outlined on pages 21 – 23 of the Youth Justice Business Plan 2025-2026 (see appendix 1)

Reasons for recommendation(s)

The legislative requirement set out in Section 40 of the Crime and Disorder Act 1998, as detailed in the summary section above.

Alternative options considered and rejected

Not applicable.

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Department: Bury Children's Services
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Background

1. Bury and Rochdale Youth Justice Service amalgamated in 2014, and our partnership board is chaired by the Director of Bury Children's Services, with the Assistant Director of Rochdale Children's Services as co-chair. Strategically and operationally partners are drawn from both boroughs.
2. Bury retained responsibility for the Youth Justice Prevention element following the merge. There are close links and working relationships between the two services to ensure that we are identifying need at the earliest opportunity. One of our key priority areas is early identification of young people who may be at risk of offending, to intervene early and reduce the number of first-time entrants into the criminal justice service.
3. The Youth Justice Plan 2025/2026 was agreed by the Youth Justice Board in July 2025, and sets out the priorities for this financial year, in addition to the proposed outcomes for children and young people open to the service.
4. Issues covered in the business plan that are important for Cabinet to be aware of include:
    a. the need for a Bury town centre base for the service,
    b. higher numbers of children in Bury's care open to the service
    c. higher numbers of Bury children with EHCPs and identified SEND being worked with by the Youth Justice Service
    d. the disproportionality of some ethnic groups within the cohort of young people supported by the service
5. The Business plan notes performance against national key performance measures, with the number of first time entrants falling and the reoffending rate and custody rate being lower than the regional or GM average in Bury and Rochdale.
6. The plan also notes key risks, which include:
    a. Inconsistent attendance at the Partnership Board, with a change in governance structure being implemented to address this issue
    b. Differential access to expert additional resource as part of the Youth Justice offer, with Bury children not having access to a dedicated CAMHs practitioner, or a Educational Attendance specialist, or a Speech and Language Therapist
    c. The absence of a seconded probation officer for children moving between children and adult youth justice services.
7. Six priority areas for 2025/26 are identified within the plan:
    a. Governance & Leadership
    b. Prevention and Diversion
    c. Remand, Custody and Resettlement
    d. Victims and Restorative Justice
    e. Serious Violence and Harmful Sexual Behaviour
    f. Quality Assurance and Workforce Development

    and these broadly map to the inspection framework for Youth Justice Services.

Links with the Corporate Priorities:

1. The Youth Justice Business plan links to the strategic vision from Let's Do It Strategy – making Bury a place of opportunity, reducing deprivation, improving

life chances, and operationalises it is the contact of children and young people involved (or at risk of involvement) in the youth justice system.

2. It supports the Council's corporate priorities by contributing directly to improved educational outcomes, increased employability, prevention of offending, building safer and more resilient communities.
3. The plan embeds the LET's principles into its approach: working at a neighbourhood level; promoting skills / education; partnership across agencies and communities; focusing on strengths and early intervention.
4. It also provides a delivery route for the Council's ambition that no young person is left behind, that services are joined up, early intervention is key, and children / young people are supported to reach their full potential.

Equality Impact and Considerations:

A comprehensive equality analysis has identified potential impacts across all characteristics which this plan seeks to address. Mitigations have been incorporated into the plan to reduce and eliminate disadvantages taking into account the different needs and approaches specific characteristics require, ensuring the plan is inclusive and equitable.

Environmental Impact and Considerations:

1. The Youth Justice Plan has a low direct environmental impact but aligns with Bury Council's commitment to sustainability and climate responsibility. Through local delivery models, digital working, and environmentally focused community reparation projects, the service contributes to reducing emissions and improving local environments.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
Demand and complexity of cases. Increasing complexity of young people's needs (e.g. trauma, exploitation, mental health, substance misuse) places strain on capacity and resources	Multi-agency planning trauma informed practice; early help pathways; workforce development in complex needs and safeguarding.
Disproportionality and Equality Continued overrepresentation of looked after children and minority ethnic groups in YJS cohort.	Regular disproportionality adults; targeted diversion for children looked after and minority groups; joint working with schools and social care; board monitoring equality data.
Partnership Coordination Changes in partner priorities (e.g. Police, Health, Education) reduce alignment or	Maintain robust Youth Justice Partnership Board governance; shared

resource contribution to youth justice outcomes.	priorities in strategic plans; joint training and communications.
Re-offending rates Increase in youth reoffending or serious violence due to social / economic pressures or reduced Early Help capacity	Focused early intervention and diversion; targeted work with known cohorts (e.g. serious youth violence); robust monitoring and case review

Legal Implications:

Every Local Authority is subject to a statutory duty to formulate and implement for every year a plan in consultation with relevant persons and bodies every year setting out how Youth Justice Services are to be funded and provided and how youth justice teams are to be composed, funded, operated and what functions they are to carry out (Section 40(1)(a)-(b) Crime and Disorder Act 1998). This plan fulfils this duty.

Financial Implications:

There are no financial implications arising directly from this report.

Appendices:

Bury and Rochdale Youth Justice Business Plan 2025-26.

Background papers:

None.

Please include a glossary of terms, abbreviations and acronyms used in this report.

Term	Meaning

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Introduction, vision and strategy

Foreword from the Director of Bury Children's Services, Chair of the Youth Justice Partnership Management Board Jeanette Richards

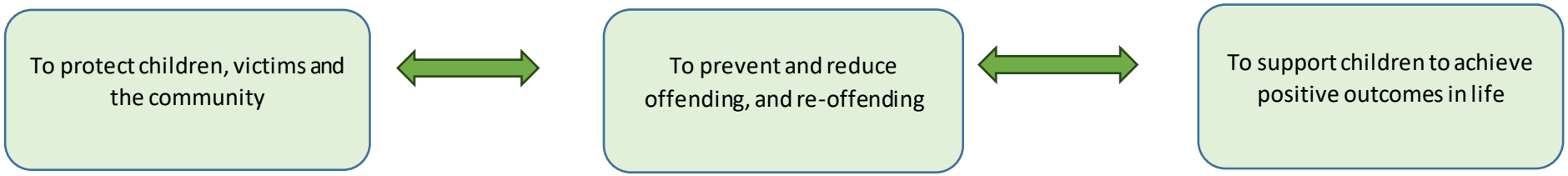
On behalf of Bury and Rochdale Youth Justice Service, and as the Chair of the Youth Justice Management Partnership Board we are pleased to share our Youth Justice Business Plan 2025- 2026. We remain committed in our goal, to achieve excellence for all children and young people, and we continue to work with families, carers and partners to achieve our shared vision.

Our Shared Vision

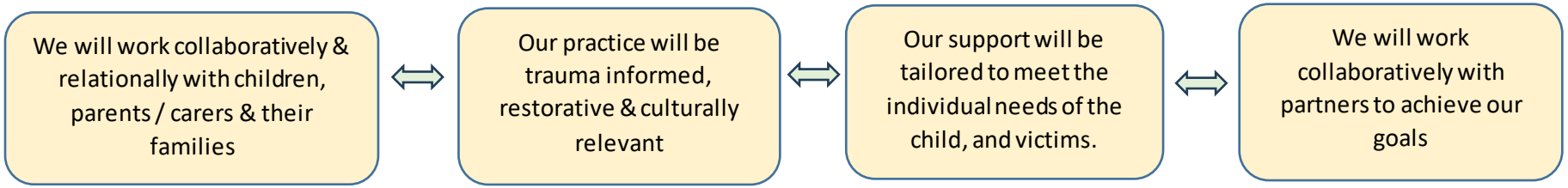
"We want Bury and Rochdale children and young people to grow up happy, healthy, with confidence, ambition and surrounded by love, care, and kindness. We want children and young people to have the very best start in life and to thrive throughout their childhood and adolescence, and for families and carers to be supported to enable this.

Our vision is to see the 'child and young person first' and to provide 'the right service, at the right time, in the right way'. We want to prevent our children and young people from entering the Criminal Justice System, to reduce offending and re-offending, to reduce custody, and to improve the safety and wellbeing of all those who come to us through supporting them to achieve their ambitions' and create a safer community, with fewer victims.
Bury and Rochdale Youth Justice, is committed to working holistically and collaboratively with children and young people, parents, carers, families, partners, and communities to achieve this vision".

Our Goals



Our approach



Local context

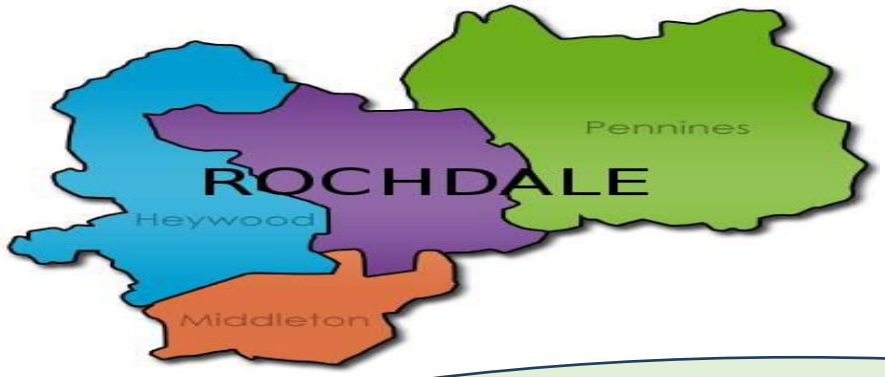
Bury and Rochdale Youth Justice Service amalgamated in 2014, and our partnership board is chaired by the Director of Bury Children's Services, with the Assistant Director of Rochdale Children's Services as co-chair. Strategically and operationally partners are drawn from both boroughs.

Rochdale [Census 2021]

Rochdale is known for its cultural diversity, and it offers a mix of traditional and contemporary shops, cafes and local business. Rochdale is well connected for commuters, offering direct tram services to Manchester city centre, whilst nestling in beautiful countryside. Average property prices in Rochdale are affordable, and this makes it an attractive option for first time buyers, and young families, which might be in part why the population is increasing. Rochdale continues to invest in its residents' offering projects, and a wide range of education, training and employment related activities. However, as in many local authorities we have areas of deprivation, and our unemployment rate and economically inactive population is above the national average.

Bury [Census 2021]

Bury is known as a vibrant market town, with green spaces, affordable living and excellent public transport including the metro link tram service into Manchester. Bury has a strong community feel, with a rich heritage and cultural scene, benefitting from well-rated schools and healthcare facilities it is an attractive place for young families to live. Bury's population has continued to increase. As with most areas Bury has areas of deprivation, and the percentage of children living in Bury in recent years has fallen.



Bury and Rochdale demographics [online census 2021]

44,740 children are between 10 & 17 years old

78 % of the Bury and Rochdale population are White British: 22% from Black and other minority ethnic groups; 33% of the population between 10 & 17 years old are from Black and other minority ethnic groups

49% of the population are males, and 51% female

Bury and Rochdale are ranked in the top 10% most deprived areas Nationally, with 26 % of children living in low – income families.

Local delivery

Bury and Rochdale Youth Justice Service is based in Rochdale, conveniently located near the town centre and bus station, ensuring easy access for children and young people from the Rochdale area. Prior to the amalgamation of the Youth Justice service, local young people were actively involved in designing their space at 'Fashion Corner' in Rochdale. The facility now includes several dedicated rooms, and hosts a fully equipped kitchen, a games room featuring a snooker table and gaming equipment, and a dedicated health space, providing a safe and supportive environment for children engaging with the Youth Justice Service.

In contrast, Bury currently does not have a comparable facility, with no suitable space for Youth Justice children to visit, and most interactions take place in the home or other community settings. One of the key challenges is the absence of a child-focused, 'drop-in' facility for children experiencing crisis, limiting opportunities for immediate support in a safe and welcoming environment. This matter has been raised at the Youth Justice Partnership Board and is under review. Bury children open to Youth Justice have access to the central Youth Centre, which is situated at the Town Hall, however, it is acknowledged that this is not an ideal setting, and therefore other options are currently being considered as a priority.

An understanding of our data and the profiles of children within our service enables us to identify both strengths and areas for improvement. This insight informs strategic planning and operational delivery, ensuring that we understand where we need to target resources to be most effective, and to achieve the best possible outcomes for young people. There are notable disparities in the availability of resources, Bury has reviewed their Prevention Offer and revised this, to ensure that this is comparable with Rochdale – an additional member of staff has been recruited to specifically work with our children in Year 5 and 6 at Primary School, Bury NHS ICB colleagues are currently reviewing the health offer. Some of the local challenges in delivering a 'shared' Youth Justice Service across two local authorities is addressing these inequalities which is essential to ensure that all children, regardless of their locality, receive equitable support and the chance to thrive.

The number of Bury children/interventions open to Youth Justice is lower than Rochdale, and therefore we would expect to see the comparable differential across data sets and Bury manage their prevention offer outside of Bury and Rochdale Youth Justice. However, despite the comparable differential the data indicates that we have more Bury cared for children open than Rochdale; a higher number of children with Special Educational Needs (SEN) and/or Education, Health and Care Plans (EHCPs). Going forward in 2025- 2026 resource need to be targeted to address these areas of concern. Notably Bury children are disproportionately represented in court proceedings, remand, and licence cases. We continue to work closely with the courts to ensure fair and equitable treatment for all children. *[caveat- small numbers often yield higher percentages which can be misleading]*

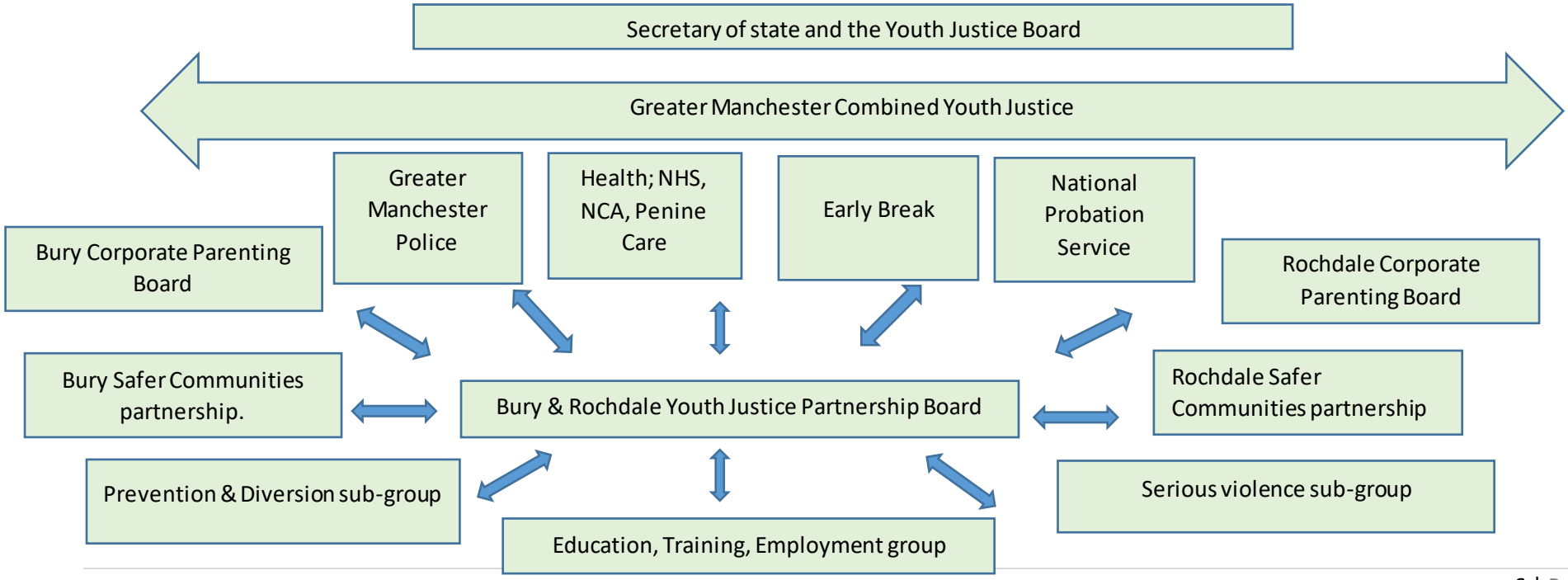
The number of Rochdale children open to Youth Justice is higher than Bury, and Rochdale specific data indicates that any disparities are comparable to the differential. In terms of ethnicity (Q4 2024/25 data), Rochdale has 15.2% more White children open to Youth Justice than Bury; Bury has 1.1% more Asian children than Rochdale; Rochdale has 2.5% more Black children than Bury; Bury has 3.6% more children identified as Chinese/Other. Notably, Bury has 9%

more Dual Heritage children open to Youth Justice than Rochdale, which indicates a higher level of disproportionality despite the difference in the number of cases.

2 Governance, leadership and partnership arrangements

Youth Justice is inspected by His Majesty Inspectorate of Prisons [HMIP], and our last inspection report rated us overall as Good [June 2020]. An inspection of youth offending services in Bury and Rochdale. Youth Justice is legislated through the Secretary of State, and our performance is monitored through the Youth Justice Board quarterly performance oversight framework. Bury and Rochdale currently sit in quadrant 3: *"Service Improvement required: Investigation and analysis of the cause or nature of concerns impacting on performance outcomes for children; identify where the service may need assistance; offering advice and guidance and broker support and/or direct delivery of intervention support".*

Strategic governance and partnership arrangements are overseen by the Youth Justice Partnership Board, which is chaired by the Director of Bury Children's Services, and co-chaired by the Assistance Director of Rochdale Children' Services. The Board currently meets' bi-monthly and our wider strategic governance arrangements are reflected in the diagram below.

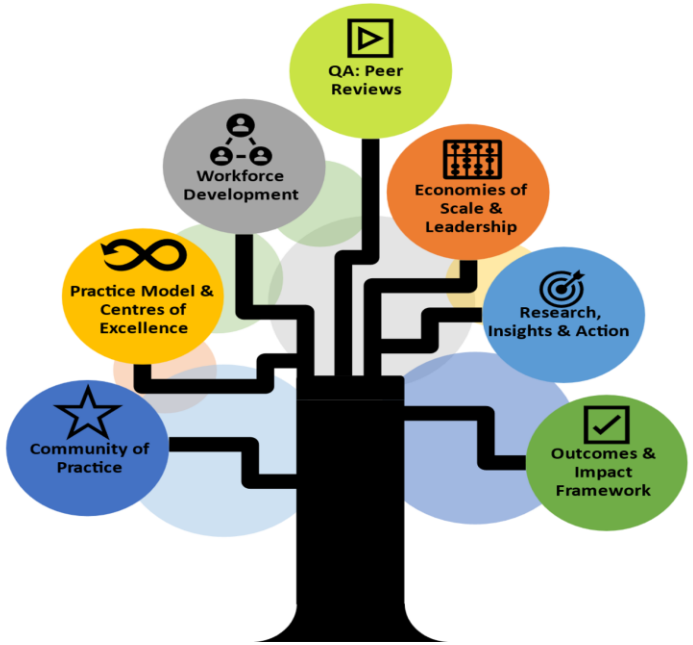


Scrutiny Committee

Our 10 Greater Manchester Youth Justice areas sit within devolved governance arrangements and each local authority lead works together through our community of practice led by Dr Alex Chard. Together we have developed the Greater Manchester Youth Justice Transformation Framework and plan, 2025- 2029. This reflects a shared and core set of Youth Justice Principles, Pillars and enablers, outcomes and priorities, and has been informed by children and young people, some of whom open to Bury and Rochdale Youth Justice. Through our Greater Manchester coordination hub, we will ensure that we learn from one another, share innovative practice, and more importantly improve outcomes for children and keep victims and communities safe. Our plan going forward is to develop a peer review model across Youth Justice Services.

A Youth Justice Coordination Hub

Growing the capability and capacity to work smarter across services and systems in Greater Manchester.



Our Greater Manchester principles are to 1] advocate for children, 2] hear their voice 3] be trauma responsive 4] strengthen communities and support victims 5] have an innovative mindset 6] collaborate and co-design 7] support children through early intervention and preventions 8] be evidence led 9] be professionally curious 10 leave nobody behind.

Our Greater Manchester pillars of delivery will focus on 1] harm and risk reduction 2] resilience and engagement 3] safety and protection 4] stability and wellbeing.

Our Local operational governance and partnership arrangements are overseen by Rochdale Children's Services. Our Head of Service, recruited in April 2025 leads and manages Rochdale Complex Safeguarding Service, missing from home/care service, and Bury and Rochdale Youth Justice Service. Bury and Rochdale Youth Justice have 2 full time Team Managers, and 2 full time Advanced Practitioners that lead and manage the team *[please see appendix 1 for full staffing structure and financial contributions]*

Seconded partnership arrangements are not equitable across Bury and Rochdale Youth Justice as per the table to the left below. This has been escalated and is under review at the Youth Justice Partnership Board.

Integrated partners

Agency / Partner	Bury	Rochdale
Police	Police officer	Police officer
Health	Nurse	Nurse
	-	CAMHS
	-	SALT
Education		
Pre 16	-	EWO
Post 16	Connexions	Positive Steps
Probation Officer	Yes [vacant]	
Serious Violence	Yes	
REMEDI/Victim	Yes	

Local Partnership Arrangements: *Bury and Rochdale have their own Early Help/ Family Help offer; and Voluntary, Community and Faith sectors that children, young people and families can access.*

Rochdale Connexions Trust: *provides mentoring to YJ children across Bury & Rochdale.*

REMEDI: *delivers Bury & Rochdale YJ victim service / reparation.*

Early Break: *working with children and families affected by substance misuse across Bury & Rochdale.*

Positive Steps*: Working with Rochdale school leavers to support in ETE.*

Connexions: *Working with Bury school leavers to support in ETE.*

PPIED: is *an approach used across Bury and Rochdale*

Turnaround: *is an approach used across Bury and Rochdale. Bury manage their own Turnaround.*

Serious Violence*: our children have access to the virtual reality decision making programme [virtual headsets] to address knife related behaviours. We also support children in school through our preventing exclusion programme for knife / weapon related behaviours.*

Complex Safeguarding: *Both Bury and Rochdale have a complex safeguarding and missing service*

Local quality assurance arrangements: We align with Rochdale Children's Services quality assurance framework.

Team Managers submit a case file audit each month, consisting of a reflective conversation with the practitioner, child, and their parent / carer to ascertain their view of the service.

Advanced Practitioners jointly complete a themed 'dip sample', and/or a quarterly themed in-depth audit.

Team Managers each submit a monthly performance report, detailing analysis of data; learning from audits, supervisions completed, and staffing matters; areas to celebrate and areas to reflect on and develop.

The Head of Service holds a Quality and Performance Clinic each month with the Team Managers and Advanced Practitioners

The Head of Service attends a Quality and Performance Clinic each month with the Assistant Director of Rochdale Children's Services.

'Close the loop' learning from the Audits is presented at the team bi-monthly alternate 'team meetings' and 'team development afternoons'

The Head of Service chairs 1 x service development afternoon each month with the Team Managers and Advanced Practitioners to review the service 'improvement' plan and prepare for forthcoming inspections.

This approach has supported us to hear the child's voice, work collaboratively with parents, and understand our practice across themed areas.

This ensures a clear line of governance, and promote a stable workforce, understanding of data, highlighting areas of strength, and areas to improve on, which supports us to provide a consistent service for our children.

This approach has supported us to start to develop a learning culture, and our children will have the benefit of a knowledgeable and skilled workforce going forward.

Update on the previous year

Progress on priorities in previous plan

In our 2024–2025 Youth Justice Business Plan, we submitted a 'Plan on a Page', which served as a positive foundation for the development of a Youth Justice Improvement Plan. However, this initial work also led to the creation of additional plans, including a Youth Justice Service Plan and a Youth Justice Performance Oversight Plan. While each plan has value, the proliferation of separate documents has diluted our strategic focus and may have hindered the pace of progress we initially aimed for. Please see a review of the 2024- 2025 priorities below:

Priority 1: Governance and Leadership; We have encountered challenges in our leadership and governance arrangements. Attendance at the Youth Justice Partnership Board has been inconsistent, with some partners not routinely engaging. Additionally, there has been limited understanding, commitment, and constructive challenge regarding the information presented at Board meetings. In response, the Board has recently established three thematic sub-groups to strengthen strategic oversight and drive improvement in key areas: Prevention and Diversion – focused on reducing First Time Entrants into the Youth Justice system: Education, Training and Employment (ETE) – aimed at promoting positive engagement and reducing reoffending: and Serious Violence – established in response to data indicating a continued rise in serious youth violence. These sub-groups are still in the early stages of development, and it is too soon to assess their impact. However, we are committed to refining and strengthening their role as part of our ongoing improvement journey.

Priority 2: Prevention and Diversion: We have continued to deliver prevention initiatives through the Turnaround Programme, the Knife Crime Exclusion Programme in schools, and PPIED. Diversionary pathways remain in place and include Outcome 22, Community Resolutions, Youth Conditional Cautions, and Deferred Cautions/Prosecutions. However, a key challenge persists; there is a noticeable disparity between the number of police disposals issued and the number of referrals received by the Youth Justice Service. This highlights an ongoing need to raise awareness and understanding of the Out of Court Disposal framework among police colleagues. To address these issues, we aim to utilise the newly established Prevention and Diversion / First Time Entrants Sub-Group to strengthen collaboration, improve referral pathways, and ensure consistent application of the OOCD framework. Additionally, we recognise the need to better understand police data—particularly the volume and characteristics of children who are: Stopped and searched, released under investigation, placed on bail, and those arrested or detained overnight. This analysis will be crucial in identifying patterns, addressing disproportionality, and ensuring that outcomes for children are fair and appropriate, and support us to reduce first time entrants.

Priority 3: Remand, Custody and Resettlement: During 2024–2025, we observed a reduction in the number of children entering custody. By Quarter 4, our custody rate was lower than the same period in the previous year and below the averages for the Northwest region, Greater Manchester, and our Youth Justice statistical family. In response to this positive trend, we have undertaken a review of our custody and resettlement processes. All children who are remanded or serving custodial sentences will be reviewed through our risk management meetings, ensuring alignment with the principles of the constructive resettlement pathway. This approach supports a more structured and rehabilitative transition for children returning to the community.

Priority 4: Victims and Restorative Justice; We are mindful of the new HMIP inspection framework, which, for the first time, introduces dedicated Victim standards. Following a review of the new expectations, we identified inconsistencies in our previous approach to victim engagement. In response, we commissioned Remedi, a specialist and experienced provider of victim services, to deliver a consistent and high-quality victim and reparation offer. This provision is still in its early stages, and we have developed a set of evaluation and outcome measures to monitor its effectiveness. Remedi will report regularly to the Youth Justice Partnership Board on the delivery and impact of the victim and reparation service. A formal review of the service will take place at six, nine, and twelve month interval to ensure continuous improvement and alignment with inspection standards.

Priority 5: Serious Violence and Harmful Sexual Behaviour; Serious violence continues to rise and remains a challenge for our service. In response, we plan to re-focus the role of our dedicated Serious Violence Project Lead, shifting from broader community safety responsibilities to a more targeted Youth Justice perspective. This includes a detailed analysis of serious violence data, examining key themes such as: locality, child characteristics, school engagement, offence type, and number and type of previous interventions. This approach aims to strengthen our understanding of patterns and 'risk' factors, enabling us to effectively target resources and interventions. We continue to deliver the virtual reality knife crime decision-making programme, which supports children in making safer choices. Additionally, the knife crime exclusion programme has been implemented in schools to raise awareness and prevent escalation. However, we recognise the need to improve our ability to track, monitor, and evaluate these initiatives. Developing a robust evaluation framework will help us understand what is working well, what is not, and inform a clear, evidence-based action plan moving forward.

Harmful Sexual Behaviour (HSB); Our Harmful Sexual Behaviour Policy has been recognised as an example of good practice by the Youth Justice Board and is featured on their national resource hub. The policy is also embedded within Tri.x CSC Greater Manchester, and local procedures. Children benefit from a well-structured, consistently delivered and regularly reviewed HSB intervention offer, ensuring a high standard of support and safeguarding.

Priority 6: Quality Assurance and Workforce Development; We have commissioned 'SHOUT' to support our engagement and participation work, completing two out of three surveys to date. Additionally, we have agreed an honorarium for a dedicated staff member to lead on developing this area further. Our next steps involve analysing the survey findings to identify emerging patterns and themes and use this insight to shape service delivery. We are committed to adopting a 'You Said, We Did' approach to demonstrate how children's voices influence our practice and decision-making. We currently capture the voice of the child through a range of mechanisms, including case file and conversational audits, feedback self-assessments, referral order panels, and review processes. However, we recognise the need to strengthen our analysis and develop clear actions that ensure children's feedback meaningfully informs service development. We submit monthly case file audits and conduct themed audits to support continuous improvement. In the coming year, we will focus on embedding learning from our quality assurance processes and evaluating the impact of these improvements on children, victims, and the wider community.

Performance over the previous year

National Key Performance Indicators

Across 2023–2024, we achieved a slight reduction in the number of First Time Entrants (FTEs), reducing from 113 to 102, which reflects our continued efforts in promoting alternatives. Our reoffending binary rate at Quarter 4 of 2023–2024 was also positive, outperforming regional and national comparators: Our rate: 17.0% (9 of 53 children reoffended, committing 38 offences), Northwest average: 28.2%, Greater Manchester average: 21.6%, and our Youth Justice Statistical Family average: 31.1%. While the number of children in custody or held on remand has increased during 2024, our rate remains below all comparator groups: Our rate: 0.09, Northwest: 0.12, Greater Manchester: 0.12, Youth Justice Statistical Family: 0.11. These figures reflect improved performance in these areas, though the rise in custodial cases highlights the need for continued focus on early intervention and robust community alternatives.

Reporting period	First Time Entrants	Reoffending rates	Custody & Remand
January – December **2023**	113	Binary 17% Frequency 4.2%	4
January – December **2024**	102	Data not available	6

Local Key Performance Indicators

KPI 1 Accommodation	*The number of children in suitable accommodation at the end of their intervention has been high, and relatively consistent across each quarter in 2024- 2025, Q1 95.8%: Q2 100%: Q3 100% and Q4 97%. Our target will always be 100%.*
KPI 2 ETE	*On average 50 % of children were in suitable education, training or employment at the end of their intervention, which is lower than we would like. We now have a dedicated ETE sub-group that reports to the Board.*

KPI 3 SEND/ EHCP	*77 children open to YJ in 2024- 2025 had EHCP or SEND needs. We plan to liaise more closely with our SEND/EHCP leads.*
KPI 4 Mental / Emotional Wellbeing	*During 2024–2025, data indicates that 15 children were already receiving mental health or emotional wellbeing support prior to undergoing our screening process. An additional 9 children were identified through screening as requiring support, bringing the total to 24. However, actual engagement with support services was significantly lower, with attendance figures ranging between 3 and 9 children. This highlights a critical gap between identified need and service uptake. Moving forward, we need to strengthen pathways to ensure children have timely and equitable access to appropriate mental health and emotional wellbeing services.*
KPI 5 Substance Use	*65% of children successfully engaged in tier 2 and 3 treatments in 2024- 2025. We continue to encourage children to access our substance use services.*
KPI 6 OOCD's	*125 children have been supported through Out of Court Disposals in 2024- 2025 [referred to YJ] [data to be treated with caution]*
KPI 7 Management Board Attendance	*Throughout 2024–2025, we have prioritised the development of our Board, with a continued focus on strengthening attendance, active participation, and shared accountability. Our efforts aim to build the Board's capacity to interpret data effectively, make informed decisions that promote equitable resource allocation, and provide a safe and supportive environment for children. Key areas of focus include serious violence, education, training and employment (ETE), prevention and diversion, first-time entrants, and reducing reoffending rates. The Chair of the Board has appropriately escalated concerns to partners, reinforcing our collective commitment to continuous improvement and our ambition to achieve excellence.*
KPI 8 Wider Services	*A significant number of our Youth Justice cohort are also engaged with wider support services. In 2024–2025, 27 children were open to Child in Need plans, 22 were cared for children, and 7 were supported through Child Protection plans — representing approximately 30% to 35% of our overall cohort. We continue to work closely with Social Care and Early Help services to ensure that children receive timely and coordinated support at the earliest opportunity*
KPI 9 Serious Violence	*We have continued to observe an upward trend in the number of children involved in serious violence offences. Between October 2023 and September 2024, 23 children were responsible for 39 such offences. A consistent pattern has emerged, with Robbery, Attempted Robbery, Knife Crime, and Violence Against the Person being the most prevalent offence types. Our serious violence rate currently stands at 8.3, which is above the average for our Youth Justice family [6.4] but remains below*

	the Greater Manchester average. We are actively analysing these trends to inform targeted interventions and multi-agency responses through our serious violence sub-group.
KPI 10 Victims	*148 Victims out of 161 consented to be contacted by us in 2024-2025. We have commissioned REMEDI, victim services to provide this service through 2025-2026.*

Risks and issues

We continue to face challenges which are discussed at our Youth Justice Board performance oversight meetings. We will remain focused on the following areas:

Youth Justice Management Partnership Board

Risk: *Attendance is inconsistent, and this has led to a lack of focus on Leadership and governance, and key areas around serious violence, prevention & diversion, first-time entrants, and re-offending.*

Reflections: *Attendance has been escalated by the chair of the Board, and a key stakeholder meeting held to improve that. The membership has been revisited; sub-groups have been implemented and the Youth Justice Board has supported in the delivery of development sessions. The Head of Service will complete a scoping exercise focusing on the Board understanding of HMIP leadership/ governance/ and partnership services stan dards for further development.*

Partnership Services: Inconsistent resource for children between Bury and Rochdale

Risk: *Bury and Rochdale Youth Justice children do not have the same access to resource. Bury Youth Justice children do not have a dedicated Children Adolescent Mental Health practitioner; Educational Welfare Officer; or a Speech and Language Therapist. Bury children do not have a child appropriate place and space in Bury.*

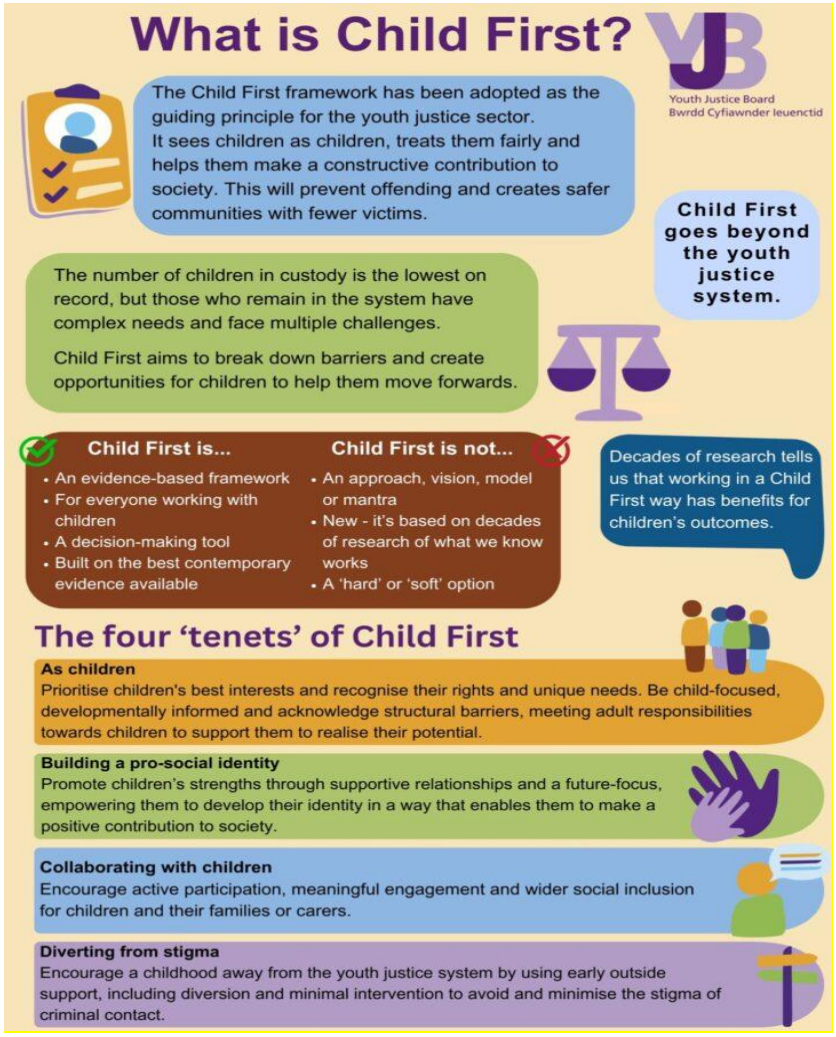
Reflections: *This disparity has been raised at the Youth Justice Management Partnership Board, but not yet resolved. We need to reflect further on the impact that this has on our Bury children and provide evidence of this to the Board.*

Risk: *we do not currently have a seconded probation officer for our children who are transitioning to adult services*

Reflections: *we have worked closely with the probation service who will financially remunerate for the post. This is a temporary measure, and the probation service are actively sourcing a probation officer, and probation service officer to fill the vacant post.*

PLAN FOR THE COMING YEAR

CHILD FIRST



Bury and Rochdale Youth Justice: our Child First approach alongside the Greater Manchester principles *[referred to on page 8]*

As Children: *We continue to create a culture that focuses on the child, their lived experience and social graces, and promote organisational and practice responses to the child first, and behaviour second. We will promote training. Our aspiration is for all of our practitioners to understand the impact of adverse childhood experiences, and be Trauma informed, understanding and advocating for their rights with our partners, including the Court.*

Building a pro-social identity: *We remain committed to our practice values, principles, and core behaviour and are ambitious for our children. We will support them to be aspirational, focus on their individual social graces, strengths, and build their confidence through creative approaches. Our ambition is to develop our 'resource directory', through our VCFS so that we create systemic 'expertise' and support for children.*

Collaborating with children: *Many of our children have learnt to mistrust professionals, and services and we struggle to engage them. We will persist to implement an engagement group. We are committed to creating different approaches to hear our children, and use their voice to shape our service, adopting a 'you said' 'we did' approach.*

Diverting from stigma *We use 'PPIED' and Turnaround approaches to identify, and support children at the earliest time. Our multi-agency processes enable us to work with partners to identify children who might benefit from mentoring, and out of court disposals, and are able to offer targeted support through SALT, Education, Health, Substance Misuse, CAMHS, and Social Care to reduce the likelihood of criminalisation and promote social inclusion. We are further supported by the GM Transformation programme, to divert children from custody, and prevent criminalisation. Our ambition is to promote our service to wider services and develop practice in line with a family's first model.*

Resources and Services

AND …

We will use our Youth Justice Board grant to support the funding of core staff, ensuring the consistent delivery of service for children across Bury and Rochdale. Continued investment in staff training will further strengthen the knowledge and skills of our workforce, enabling us to better meet the diverse needs of the children we support and improve outcomes across the partnership

We will continue to fund a dedicated lead professional to oversee our Serious Violence Project. This role is pivotal in driving efforts to reduce serious violence, safeguard victims and the wider community, and promote positive outcomes for children. Over the next 12 months, the project lead will be responsible for the implementation and evaluation of the *Round Midnight* virtual reality knife crime decision-making programme. This innovative initiative combines creative arts with educational technology to engage young people in immersive, meaningful learning experiences that challenge perceptions and influence safer choice. Round Midnight - Creative arts and EdTech; and our school prevention / exclusion programme.

Our grant will also support the appointment of dedicated staff and approaches to strengthen the voices of children and parents/carers. This will underpin the development of our engagement and participation strategy, which includes commissioning surveys, exploring innovative approaches to reach children, and ensuring access to safe and inclusive spaces—aligned with the principles of the Lundy model of participation. By embedding their voices into our service design and delivery, we aim to ensure that our interventions are responsive, inclusive, and targeted where they are most needed.

We remain firmly committed to investing in early intervention and prevention initiatives. Our focus will be on strengthening partnerships with Family Hubs and wider agencies, while developing a clear and recognisable *Children and Families First* brand. This will be supported by developing a communication strategy, and co-designing informative leaflets, targeted promotional materials streamlined referral pathways, These efforts are designed to ensure that children and families receive timely, accessible support at the earliest opportunity

Finally, the grant will support services for victims and facilitate reparation opportunities for children through our commissioned partner, REMEDI, which provides restorative justice and victim support services. What We Do: Victim Services | Remedi

BOARD DEVELOPMENT

Domain one- organisational delivery
[Youth Justice Services – HM Inspectorate of Probation]

Bury and Rochdale Youth Justice Partnership Board: Governance and Strategic Updates

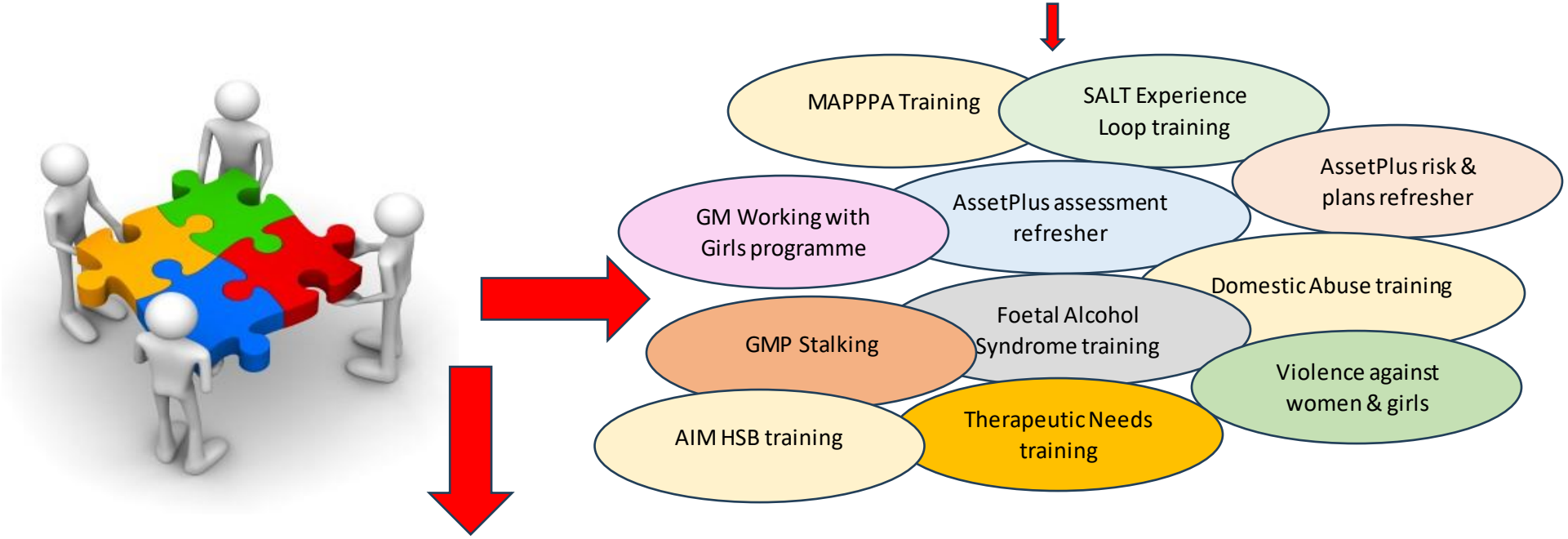
The Bury and Rochdale Youth Justice Partnership Board has encountered several challenges, including inconsistent attendance from key stakeholders, limited scrutiny of priority areas, and concerns regarding the seniority of Board representation. These issues have been formally escalated by the Chair and addressed with the support of our Youth Justice Board (YJB) regional lead, who facilitated a development session aimed at strengthening governance and strategic alignment.

To enhance operational effectiveness, we have established thematic sub-groups focusing on key priority areas: prevention and diversion/first-time entrants, serious violence, and education, training, and employment (ETE). Although these groups are in the early stages of development, our immediate focus is on improving data interpretation and providing clear strategic direction to drive meaningful outcomes for children engaged with Youth Justice services.

Operating a dual-authority Youth Justice service presents inherent complexities, particularly in achieving equitable resource allocation across both local authorities. This issue has been escalated, and the Chair has engaged with senior stakeholders, the YJB regional lead, and the Head of Service to raise concerns. We remain committed to addressing this challenge through ongoing dialogue and collaboration at Board level

2025- 2026 *In the coming year, we will undertake a self-assessment with Board members, aligned with HM Inspectorate of Probation (HMIP) expectations for leadership, governance, and partnership working as outlined in the Inspection Framework. This reflective exercise will support the identification of development areas and ensure the Board is well-positioned to provide effective oversight and strategic support for Youth Justice services.*

WORKFORCE DEVELOPMENT



We will remain committed to ongoing investment in our workforce to ensure resilience, reflective practice, and continuous professional development. Personal supervision will continue to support staff wellbeing and resilience, while reflective case supervision will be used to promote best practice and learning. Practitioners are encouraged to engage in continuous development through their annual DELVE conversations, which provide a structured opportunity to reflect on progress and identify growth areas.

***In 2025–2026**, we will undertake a comprehensive training needs analysis to assess levels of confidence and competence across the workforce. This will enable us to tailor our training offer to meet identified needs of staff.*

In addition, we will consider findings from national, regional, and local audits to identify learning gaps and implement training in response to recommendations. A particular focus will be placed on strengthening the 'golden thread' across assessment, planning, interven tion delivery, review, and case closure. This includes embedding an understanding of social graces, enhancing the quality of written work, a nd promoting the use of child-centred, strengths-based language.

EVIDENCE BASED PRACTICE AND INNOVATION

We are actively engaged in the Greater Manchester Remand Pilot, which commenced in 2023. The initiative seeks to consolidate remand funding across the ten Greater Manchester Youth Justice Services to explore whether a pooled approach can facilitate investment in innovative community-based alternatives to secure remand for children. A range of creative proposals are currently being considered for the 2025–2026 remand underspend, and we remain committed to supporting this progressive and collaborative approach.

We are actively involved in the Greater Manchester Youth Justice Community of Practice, which has played a key role in shaping the Greater Manchester Youth Justice Transformation Framework 2025–2029. This framework represents a distinctive regional approach that enables collaborative service co-design and the sharing of best practice across the sector.

We are working towards developing our engagement and participation strategy, which reflects the evidence-based Lundy Model of Participation. This will provide a rights-based framework for engaging children in decision-making processes. It emphasises four key elements: Space, ensuring safe and inclusive opportunities for children to express their views; Voice, supporting them to articulate their perspectives freely; Audience, ensuring their views are actively listened to; and Influence, demonstrating how their input has informed outcomes. Our plan is to develop an engagement group, and different approaches to capture the child's voice so that we can use this to have a tangible impact on the services and decisions that affect their lives.

Serious violence remains a concern for us, and in response, we have commissioned the Virtual Reality Knife Crime Decision-Making Programme. This innovative initiative has garnered substantial interest from researchers and evaluators and is supported by the Department for Education. We also recognise that sustained engagement in suitable Education, Training, or Employment (ETE) is a key protective factor against offending. In partnership with community safety, we have implemented the Knife Crime Exclusion Programme, which aims to support young people at risk of exclusion due to knife-related incidents. Together, these initiatives are designed to foster positive behavioural change, reduce the risk of reoffending, and enhance safety for victims and communities alike.

We continue to apply the PPIED and Turnaround approaches to provide early intervention support for children, working closely with Rochdale's 17 Family Hubs. These hubs play a vital role in facilitating early referrals, often before a child comes to the attention of the police. We recogni se, however, that there is more we can do to improve accessibility and engagement. As part of this, we are reflecting on our service 'branding', acknowledging that the term 'Youth Justice' can sometimes act as a barrier for families seeking support at the earliest opportunity.

Our Harmful sexual behaviour policy and practice standards has been recognised by the Youth Justice Board as good practice and can be found on the Youth Justice Board resource hub.

EVALUATION

Audits: *In line with our internal Quality Assurance Framework, we have continued to submit monthly case file audits, incorporating feedback from children, parents, and carers. Additionally, we have undertaken targeted 'dip sampling' across key areas including Home Visits, Planning, Desistance Factors, Language, Intervention Work, our Trauma-Informed Approach, and understanding of Adverse Childhood Experiences (ACEs). The findings indicate a mix of outcomes, with some areas considered good and others requiring improvement. However, the audits also highlight inconsistencies in practice, which we are committed to addressing through ongoing reflection, training, and quality improvement measures.*

Our Out of Court Disposals (OOCD) are subject to quarterly scrutiny through the OOCD Scrutiny Panel, which includes representatives from Greater Manchester Police, the Crown Prosecution Service, Magistrates, and Youth Justice. The panel's purpose is to ensure that decis ion-making is appropriate, defensible, and aligned with national guidance. Feedback on our practice has generally been positive; however, areas for improvement have been identified—particularly in collaboration with police colleagues in both Bury and Rochdale—to promote a more consistent and child-centred approach across the region. We are actively involved in the development of child centred policing in relation to out of court disposals through the Greater Manchester Youth Justice lead community of practice and transforming Youth Justice plan.

PRIORITIES FOR THE COMING YEAR: Standards for children

STANDARD 1 OODC

Our data indicates that not all children issued with a Community Resolution or Outcome 22 are referred to us by our police partners. This gap limits opportunities for timely intervention and tailored support.

Our 2025–2026 *commitment is to address this issue by strengthening referral pathways & enhancing collaboration with police colleagues to ensure that more children receive support at the earliest stage of the justice system. By doing so, we aim to reduce the number of First Time Entrants and promote more effective, preventative approaches to youth offending.*

STANDARD 2 At Court

We are committed to strengthening our quality assurance processes for children who attend Court, with a particular focus on ensuring issues of disproportionality are clearly reflected & addressed within reports.

Wherever possible, children will be supported with a communication passport—a tool designed to help the Court understand the communication style of the child appearing before it.

All children & families will receive an information leaflet explaining Court procedures and Youth Justice processes to help demystify the system, reduce anxiety, & support engagement.

STANDARD 3 In the community

Our approach to supporting children will be grounded in Child First, strengths-based, & trauma-informed principles, engaging with children in safe places.

We will adapt our practice to meet the unique needs of each child, delivering services in a way that respects & reflects their individual identity, background, & social graces.

Our records will be written to the child—using accurate, non-blaming, & appropriate language, ensuring our communication is respects & reflects the child's voice and journey

STANDARD 4 In secure settings

We remain committed to providing timely & accurate information to the secure estate to support the safety & wellbeing of children.

Children will be seen regularly to maintain trusted relationships with their practitioners, offering continuity of care & emotional support.

We will advocate for family, supporting families to maintain contact with their child wherever possible.

We will advocate access to ETE opportunities to support continuous learning. Accommodation will remain a key focus

STANDARD 5 On transition & resettlement

We will embed the principles constructive resettlement in our risk management processes; [pre-sentence stage to post-custody]. This will enable us to address areas of concern and actively promote protective factors to support long-term desistance and positive outcomes.

We will work in partnership with colleagues from the NPS to strengthen transitions for children aged 17 + to ensure our young people receive the right support as they transition into becoming a young adult

SERVICE DEVELOPMENT

As a Youth Justice service, we operate within a framework shaped by legislation, governing bodies, and external inspection standards. In addition, we are accountable to our wider Children's Services directorate through internal assurance processes, all of which are designed to drive continuous improvement and deliver excellence for the children we support. Looking ahead to 2025–2026, we are committed to evolving and modernising our Youth Justice offer to ensure it remains responsive, relevant, and aligned with the current and emerging needs of our children and young people.

Throughout 2024–2025, we have remained in Quadrant 3, and our focus moving forward is to return to core principles—understanding our data in depth, gaining deeper insight into the lived experiences of our children, and fostering a culture of continuous learning. By doing so, we aim to address key areas for development and strengthen our practice. This approach will help us promote safety and stability, support children in achieving positive change, and ultimately contribute to safer outcomes for children, victims, and the wider community. This outline plan below will inform our comprehensive plan.

Child First Principles: Engagement & Participation; Education, Training & Employment: Disproportionality: Victims

Quality Assurance

Develop comprehensive data sets and analysis

Complete case file and thematic audits

Evaluate & evidence learning from audits

Promote reflective individual and peer / group supervision

Workforce & Service development

Understand the training needs of the workforce

Support team meetings and service development days.

Use feedback from staff, children, parents / cares to inform and shape service delivery.

Engagement & Participation

'Hear & Act'

Hear: *develop different approaches to hear the voice of children, parents/ carers*

Act: *act on what children, parents/ carers say and use their voice to develop our service*

Respond: *'You said' 'we did'. Feedback to children, parents/ carers about how their voice has shaped the service*

Prevention & Diversion/ First Time Entrants

Work with police colleagues to implement child centred policing, GM OOCD Framework

Police will provide data so that we understand stop-search; arrests/detention; children RUI and bailed

Police OOCD's disposals will result in a referral to YJ.

Fewer children will become FTE's

Serious violence

To develop a detailed analysis of our data for serious violence

To work with our partners to reduce serious violence through innovative strategies and service delivery

Evaluate outcomes, to review and adapt our response to need.

Re-offending, custody & remand

Direct work will be tailored to meet the needs of the child, and their lived experience to maximise impact

We will promote alternatives to remand & custody where it is safe to do so.

NATIONAL PRIORITY AREAS

Certain groups of children continue to be over-represented within Youth Justice and across wider services. While we do not control the referrals made to us, we recognise that children from specific backgrounds—such as those from minoritised ethnic groups, those with SEND or EHCPs, children in care, or those already known to other services—may be disproportionately referred in, and, as a result, over-represented. It is essential that we understand which groups are affected and why, so that we can engage with these children in ways that are meaningful, respectful, and responsive to their lived experiences. This understanding is key to delivering equitable and inclusive support. Bury and Rochdale have observed an over-representation in the groups below.

Ethnicity

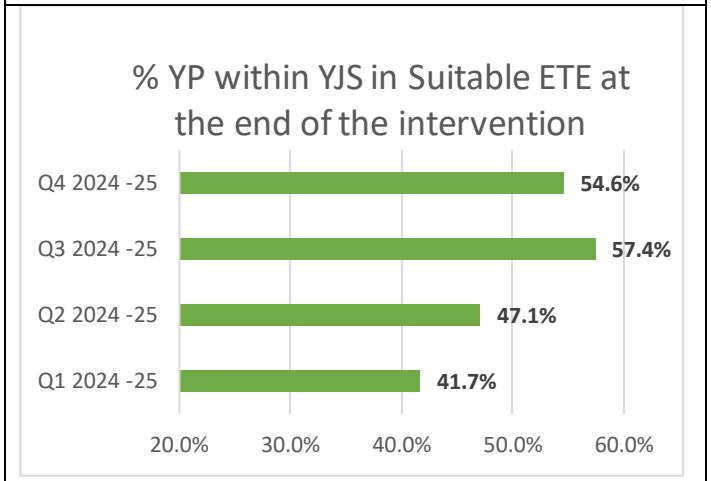
Ethnicity	Total Caseload		Total Caseload%	
	Bury	Rochdale	Bury	Rochdale
White	**34**	**77**	**54.8%**	**70.0%**
Asian	**8**	**13**	**12.9%**	**11.8%**
Black	**3**	**8**	**4.8%**	**7.3%**
Chinese/Other	**5**	**5**	**8.1%**	**4.5%**
Mixed	**9**	**6**	**14.5%**	**5.5%**
Unknown	**3**	**1**	**4.8%**	**0.9%**
Total	**62**	**110**	**100%**	**100%**

*[**Data is showing open interventions between Q4 2024-2025]***

There remains a disproportionate overall picture across some ethnic groups with 35.5% of our Youth Justice Service children from Asian, Black or Mixed heritage, although this is based on small overall numbers, it is prone to fluctuation and can be misleading unless viewed over much longer time periods based on higher overall numbers.

2025-2026 plan: *To design and implement our disproportionality policy and quality assurance process so that we ensure that we consider diversity and equality in our Standards [OOC, Court, Community, Secure, and Transitions], through our Assessment, Plan, Delivery, Review, Closure; Supervision; Reports, and Audits. To ensure our workforce are culturally competent.*

Education, Training and Employment



Data Quarter 4 2024- 2025

Children who are open to Youth Justice often struggle with Education, Training and Employment. At the end of their intervention 54.6% of children were in suitable education. 13.95 % of children had a Statement of Educational Needs; and 10.47% had an Education Health Care Plan.

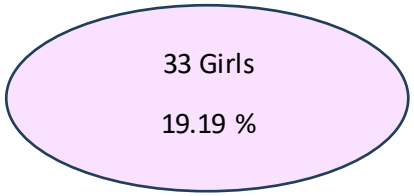
2025-2026- *We will support children to feel a sense of achievement through delivering AQA's; and advocate for children to have access to the right education, training and employment. This will include working with school to reduce exclusions, promote attendance and participation and engagement.*

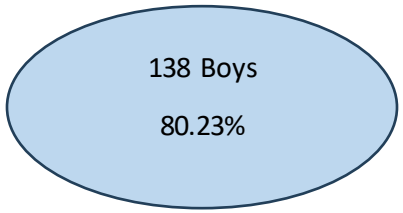
Gender

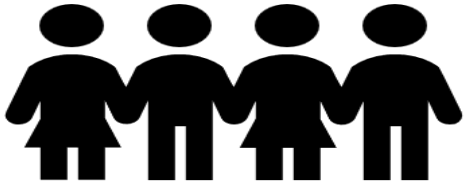
Data Quarter 4 2024- 2025

The number of girls open to our Youth Justice Service has remained relatively consistent during Q1,2,3 and 4 in 2024- 2025. We have worked with the Greater Manchester working with girls' group & have identified specific areas of support that is needed, resulting in a Greater Manchester programme for girls.

2025- 2026: *We need to evaluate this programme through feedback from our girls, and reflect on what is working well, an what we need to strengthen.*







Cared for children

Data Quarter 4 2024- 2025

We recognise that these children are among the most vulnerable, often having experienced significant adversity and trauma. At Quarter 4, two of the twenty cared for children had committed offences within their care setting. In alignment with child-centred policing principles, we continue to advocate for Out of Court Disposals (OOCDs) wherever it is safe and appropriate to do so. All children are screened prior to court appearances to assess whether an OOCD can be pursued as an alternative to formal proceedings.

2025–2026, *we are committed to strengthening our advocacy for cared for children. This includes developing joint supervision and audit arrangements for those assessed as posing a high risk of reoffending and/or serious harm to others, ensuring a more coordinated and trauma-informed response.*

Policing: We have two full time seconded police officers representing Bury and Rochdale in our service

We continue to face challenges in fully implementing child-centred policing & the OOCD framework across Bury and Rochdale. One of the key barriers is limited police data, & the data that we do receive highlights significant gaps between the number of recorded disposals & the number of children referred for Youth Justice support. For example, in Quarter 4, 172 crimes were recorded (with some children linked to multiple offences), yet only 32 referrals were made to Youth Justice during the same period.

2025–2026, *we are taking a proactive approach to address these issues. We are escalating concerns through our partnership board and directly with police colleagues. We have formally requested a monthly data set from the police, advocated for additional training for frontline officers, and committed to refreshing our local joint working arrangements in line with NPCC guidance. Additionally, we will developing a clear escalation pathway to strengthen governance and accountability. These actions aim to reduce the number of First Time Entrants (FTEs) and ensure children receive timely and appropriate support.*

Prevention

Bury Local Authority complete their own Prevention & Turnaround support.

At Quarter 4 of 2024–2025, 40 children (27.21%) were open to our Rochdale Prevention Service. Of these, 25% were supported through school-based prevention [Knife Crime Exclusion Programme], 55% through the Turnaround programme, 7.5% through other mentoring-based prevention support, and 12.5% for Harmful Sexual Behaviour (HSB) prevention. We continue to deliver both PPIED and Turnaround interventions and work closely with partners to prevent children from entering the criminal justice system. We have begun to strengthen our collaboration with Family Hubs, with referral pathways becoming more embedded and our attendance at Family Help Panels increasing. Additionally, we have aligned Youth Justice single points of contact with neighbourhood teams, although further work is needed to consolidate this approach. We continue to work closely with Bury prevention service.

2025–2026, *our priorities include: Reviewing policies and collaborative working arrangements with partners: Strengthening feedback mechanisms from children, parents, and carers: Developing an evaluation process to assess the impact and effectiveness of our prevention offer: Enhancing collaboration with the Youth Service to support targeted outreach work: and continue to work across Greater Manchester to understand and improve our connectivity with Young Future Hubs.*

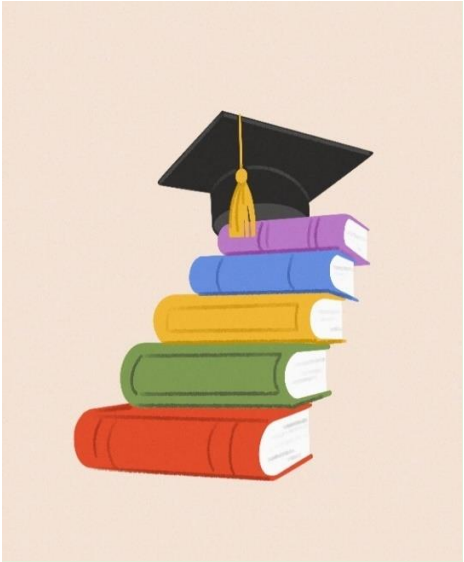
Diversion

Data 2024- 2025

During 2024–2025, we supported 123 children through OOCD's (YCC) – 21, (YC) – 39, (CR) – 42, and Outcome 22 – 2. We continue to observe a higher number of Rochdale children receiving OOCDs compared to Bury, even when accounting for differences in overall caseloads. Our OOCD's are scrutinised at an external panel [CPS, Police & YJ] & are observed to be appropriate.

2025–2026- *our priorities are outlined in the policing section above, and outline plan but also include: Reducing the number of children receiving multiple Community Resolutions or Outcome 22s before being referred to Youth Justice: Ensuring that children issued with a police disposal are referred to Youth Justice for appropriate support: Promoting the full use of available disposals, including deferred cautions and deferred prosecutions: Further developing the multi-agency Joint Decision-Making Panel to streamline processes, ensure child-focused decision-making, and support positive outcomes: and establishing a robust evaluation framework to better understand our strengths and areas for development. These actions are aimed at reducing First Time Entrants, supporting early intervention, and enhancing safety for children, victims, and communities.*

EDUCATION



% in Suitable ETE at the end of the intervention	Outcome
Q4 2024 -25	54.6%
Q3 2024 -25	57.4%
Q2 2024 -25	47.1%
Q1 2024 -25	41.7%

Child	Q1	Q2	Q3	Q4
SEND	17	19	17	24
EHCP	13	14	11	18

Our data tells us that on average 51.55% of our children were in suitable education, training, or employment related activity during 2024- 2025. 'Suitable' is defined as a minimum of 25 hours per week of school or with a training provider for school age or 16 hours minimum of paid employment, training, college or volunteering.

Overall, we have seen an increase in the number of children who have complex support needs and have a statement of education needs and disabilities, and / or an Education Health Care Plan.

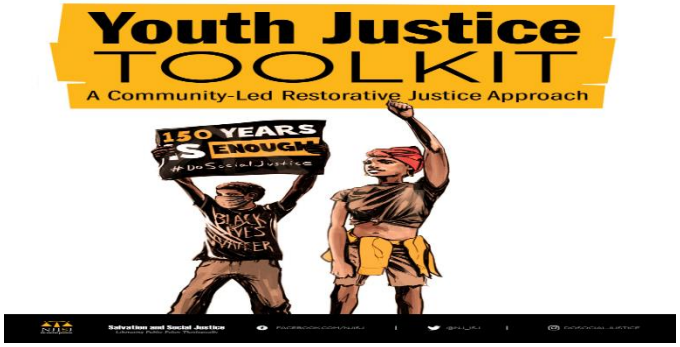
Our Rochdale children have access to our education welfare officer who liaises closely with education providers to promote the right opportunities to learn. Bury children do not.

We continue to work closely with Bury Connexion and Rochdale Positive Steps to support our young people into education and training opportunities.

We have liaised with our Speech and Language Therapist and developed a *'communication passport'* for our children who are diagnosed neurodiverse. This can be used in Court, so that Judges/Magistrates are aware of communication needs.

2025 – 2026 – *Our Youth Justice Partnership Board recognises that access to education, training, and employment (ETE) is a critical protective factor that supports children in achieving positive outcomes & reduces the risk of reoffending. We have established a dedicated ETE sub-group to drive strategic direction and operational improvements. This group is focused on increasing the number of children in suitable provision, reducing school absence, and preventing exclusions. Our aspirations include securing access to a dedicated Education Welfare Officer for Bury children, deliver AQA-accredited programmes to foster a sense of achievement, and developing creative and innovative learning opportunities for children who face challenges in traditional academic settings. These efforts are designed to ensure that all children have the opportunity to thrive and succeed in education and beyond.*

Restorative approaches and victims



Data 1.4.2024 – 31.3.2025

We are committed to ensuring that victims are heard & that their experiences inform our work. A total of 161 victims provided consent for their information to be shared with the police. Of these, 91% agreed to be contacted by our team, & 63% engaged in discussions around restorative justice opportunities. Among those who consented to contact, 70% were consulted for their views prior to OOC & court disposals. Notably, 61% expressed a desire to be kept informed about the child's progress. All victims were kept updated throughout the process. [The Code of Practice for Victims of Crime in England and Wales and supporting public information materials - GOV.UK]

In alignment with the newly developed Victim Standards under the updated HMIP Inspection Framework, we commissioned REMEDI to deliver specialist victim-related services. This initiative ensures our practices are consistent with both the Victims' Code and HMIP standards. While this service is still in its early stages, it has involved several planning meetings to establish clear expectations and parameters.

Looking ahead to **2025–2026**, we have appointed a dedicated Team Manager to lead this area of work. The service will remain under continuous review to ensure its effectiveness and alignment with best practice.

REPARATION

Remedi have started to foster relationships with several organisations in the community to broaden our reparation offer and have developed relationships with Trinity Community foodbank, youth club and veteran's breakfast: Radcliffe litter pickers; growing together Radcliffe; Nature Wild: Little Britain Anglers; the Rock shopping centre; Rochdale AFC; and the Canal and River trust. Going forward we need to develop an evaluation framework to understand the impact of these projects.

Serious violence, exploitation and contextual safeguarding

Data year ending December 2024

There were 48 recorded serious violence offences involving children, representing an increase of 26 compared to the same period the previous year. The rate of serious violence per 10,000 of the general 10–17 population rose to 10.3%, an increase of 5.6%. Robbery, knife-related behaviour, and violence against the person continue to be recurring themes. In response, we have appointed a Serious Violence Project Lead who works across Youth Justice and Community Safety, leading on the delivery of the Virtual Reality Knife Crime Programme and the School Exclusion Prevention initiative. The Youth Justice Partnership Board has acknowledged the rise in serious violence and established a dedicated Serious Violence Sub-Group to provide strategic oversight and drive operational change.

2025–2026, *our priorities include: monthly analysis of serious violence cases to better understand the characteristics, demographics & localities, evaluating the effectiveness of our interventions, incorporating feedback from children & their parents/carers to inform continuous improvement, undertaking rapid reviews where appropriate and embedding learning into practice, ensuring our multi-agency decision making & risk management panels consider context, challenge & support partners to ensure resources are targeted effectively and safely, with the overarching aim of reducing serious violence and improving outcomes for children and communities.*

Complex Safeguarding

Rochdale Complex Safeguarding Service and Bury and Rochdale Youth Justice share the same Head of Service, while Bury Complex Safeguarding operates under its own leadership. Both services continue to work in close partnership with the Greater Manchester Combined Authority, which brings together statutory safeguarding partners—Social Care, Police, and Health—under a unified regional approach.

Bury and Rochdale Youth Justice are aligned in principle with the Tackling Child Exploitation (TCE) eight principles, as illustrated in the diagram below. These principles underpin our approach to complex safeguarding and reflect our commitment to child-centred, trauma-informed practice. The Greater

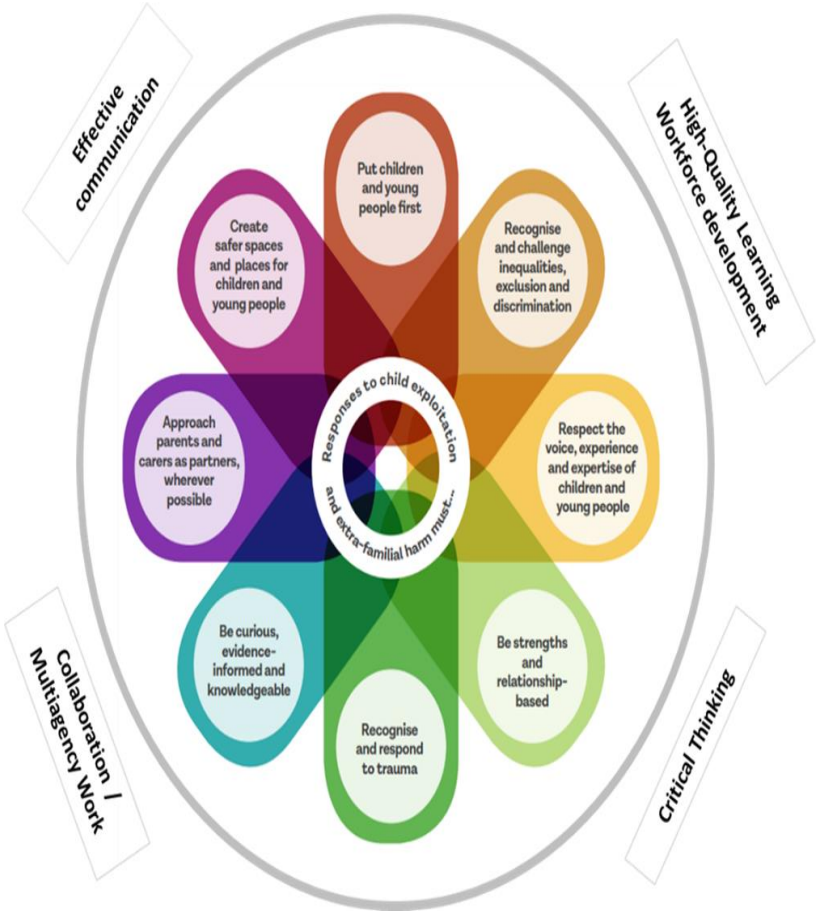
Manchester Complex Safeguarding Strategy 2024–2027 https://www.greatermanchester-ca.gov.uk/media/2z5p0kqu/greater-manchester-complex-safeguarding-strategy-final-accessible.pdf is delivered across four strategic pillars: Prevention and Early Intervention, Intervention and Protection, Disruption, and Recovery. These pillars closely align with the core aims of Greater Manchester Youth Justice, demonstrating a shared set of values, priorities, and delivery objectives across both services.

Bury and Rochdale have established information and intelligence-sharing arrangements; however, current data reporting routes through the Complex Safeguarding process—rather than the Youth Justice system—have led to gaps in our understanding of children who are open to both Bury and Rochdale Youth Justice and Bury Complex Safeguarding.

At the end of Quarter 4 (2024–2025), Rochdale's Complex Safeguarding Team had 72 children open to them. Of these, 19 (26.38%) were also open to Youth Justice, with 14 (19.44%) linked to child criminal exploitation and 5 (6.9%) to child sexual exploitation. Among these children, 11 [57%] had active National Referral Mechanism (NRM) submissions: 4 [21%] with conclusive grounds, 7 [36%] with reasonable grounds, and 8 [42%] assessed as not requiring an NRM. In Quarter 1 of 2025, Greater Manchester Police made 82 child-related referrals under the Modern Slavery framework—2 from Bury and 6 from Rochdale.

Youth Justice are aware of the PREVENT and CHANNEL agenda and the head of service is the Channel Panel co-chair. Staff are expected to complete training as part of their induction.

2025–2026, *we will: Reflect on and strengthen how we report, track, and collaborate with partners on NRM submissions: Establish a clear and consistent mechanism for information exchange between Bury Complex Safeguarding and Youth Justice: and explore and implement effective joint approaches to ensure our most vulnerable children receive coordinated, timely, and trauma-informed* support.



Detention in Police custody

*We receive information daily with regards to stop and search and arrets for children across Bury and Rochdale. However, there is no specific data reporting framework in place that collates and reports on this monthly, so understanding and responding to this data in real time, for **2024 – 2025** is a challenge. [Caution; the data must only be used as a guide]*

Arrests B524 & R 358: of which 52% resulted with no further action; of the remaining children 53% were RUI and 18% bailed, 8% received an OOCD, and the rest are referred to under 'other'.

***2025-2026-** we continue to collaborate closely with our police colleagues to develop a monthly data set to capture characteristics and interactions with our children including: the number issued an OODC by the police, compared with those referred into Youth Justice; the number stopped & searched, arrested & detained, outcomes & the rationale behind decision making. Going forward this enhanced data collection will enable us to identify & respond swiftly to any emerging disparities & provide a foundation for constructive challenge to ensure our interventions occur at the earliest opportunity, informed by an understanding of need & demand.*

Remand

Q4 2024- 2025: *Our data shows that we have low remand rates: Notably both children are 'non-white' and have become 'cared for' as a result of their remand.*

Young People Custody Caseload Jan - Mar 2025							
Gender	Ethnicity	Area	YOI	C4C Status	Intervention Type	Offence	Outcome
M	Mixed	Bury	Barton Moss	In Care Status Unknown	Remand	False Inprisonment	Ongoing
M	Black	Bury	Wetherby	Remand LAC status	Remand	Robbery	Sentenced to DTO

As part of the Greater Manchester Remand pilot our children have an opportunity to be remanded to accommodation in the community, but we are mindful that this 'placement' meets the needs of a selected few, rather than the majority. Whilst our remand rates are low, we continue to reflect on the opportunities to support our children through alternatives to remand, or remand to the care of the local authority where it is safe to do so.

2025- 2026*: and strengthen our collaboration with colleagues in social care to develop joint assessment pathways. The children on remand will follow the same pathway referred to below.*

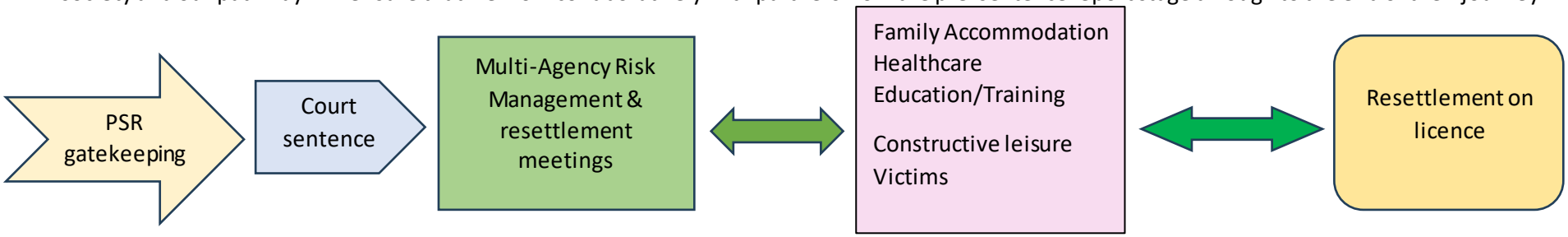
CUSTODY

Our current rate of 0.09 is lower than the same time last year at 0.13, and is lower than the Northwest, Greater Manchester, and our Youth Justice family.

Custody rate per 1,000 per 10-17 population. Good performance is low percentage	Bury & Rochdale	Northwest	Greater Manchester	YJ Family	England
Jan - Dec 2024	**0.09**	**0.12**	**0.12**	**0.11**	**0.10**
Oct - Sep 2024	0.06	0.11	0.10	0.13	0.10
Jul - Jun 24	0.06	0.11	0.10	0.12	0.10
Apr - Mar 24	0.09	0.12	0.11	0.14	0.11

Between January- March 2025 we had 6 children in custody 4 of whom have been sentenced. It is clear that children are receiving custody for serious offences, however in terms of disproportionality 3 out of the 4 are 'non-white', and 1 became care experienced during their custodial term.

AND…. **CONSTRUCTIVE RESETTLEMENT:** We know that Children in custody are likely to be amongst the most complex and vulnerable children in society and our pathway will ensure that we work collaboratively with partners from the pre-sentence report stage through to the end of their journey…



2025-2026: we will review our pathway and develop our Multi- agency Risk & Resettlement Management meeting to include a focus on constructive resettlement so that all our children have an opportunity for individually tailored support at the outset.

Reviews are in collaboration with children and families.

WORKING WITH FAMILIES

We work collaboratively with children, parents / carers and other family members to support our children to achieve positive change, and importantly to sustain that change. Bury and Rochdale work separately to deliver prevention and Turnaround, using whole family approaches. Turnaround Programme - GOV.UK

We are active members of the Early Help Panel, which provides us with valuable insight into the challenges and barriers faced by families. This engagement enables us to better target support to those most in need.

We aspire for all of our assessments and intervention plans to be developed in collaboration with parents and carers, whose feedback is actively sought during reviews and panel discussions.

Additionally, we have commissioned SHOUT to conduct three surveys to gather meaningful feedback from children, young people, and their families. We are in the analysing the information from two of the surveys, and plan to deliver the third survey imminently. This will inform continuous improvement and ensure that our services remain responsive to their needs and experiences.

***2025 – 2026** - To further strengthen communication and transparency, we will develop accessible leaflets for children, young people, and their families that clearly outline our services and support offer. The feedback provided through the 'SHOUT' surveys will inform our activity in the coming year.*

Sign off, submission and approval

Youth justice plans, in England only, must be signed off by the full council in accordance with 'Regulation 4 of the Local Authorities (Functions and Responsibilities) (England) Regulations 2000'.

Jeanette Richards

Director Children Services Bury

Chair Youth Justice Management Board

Signature

Abu Siddique

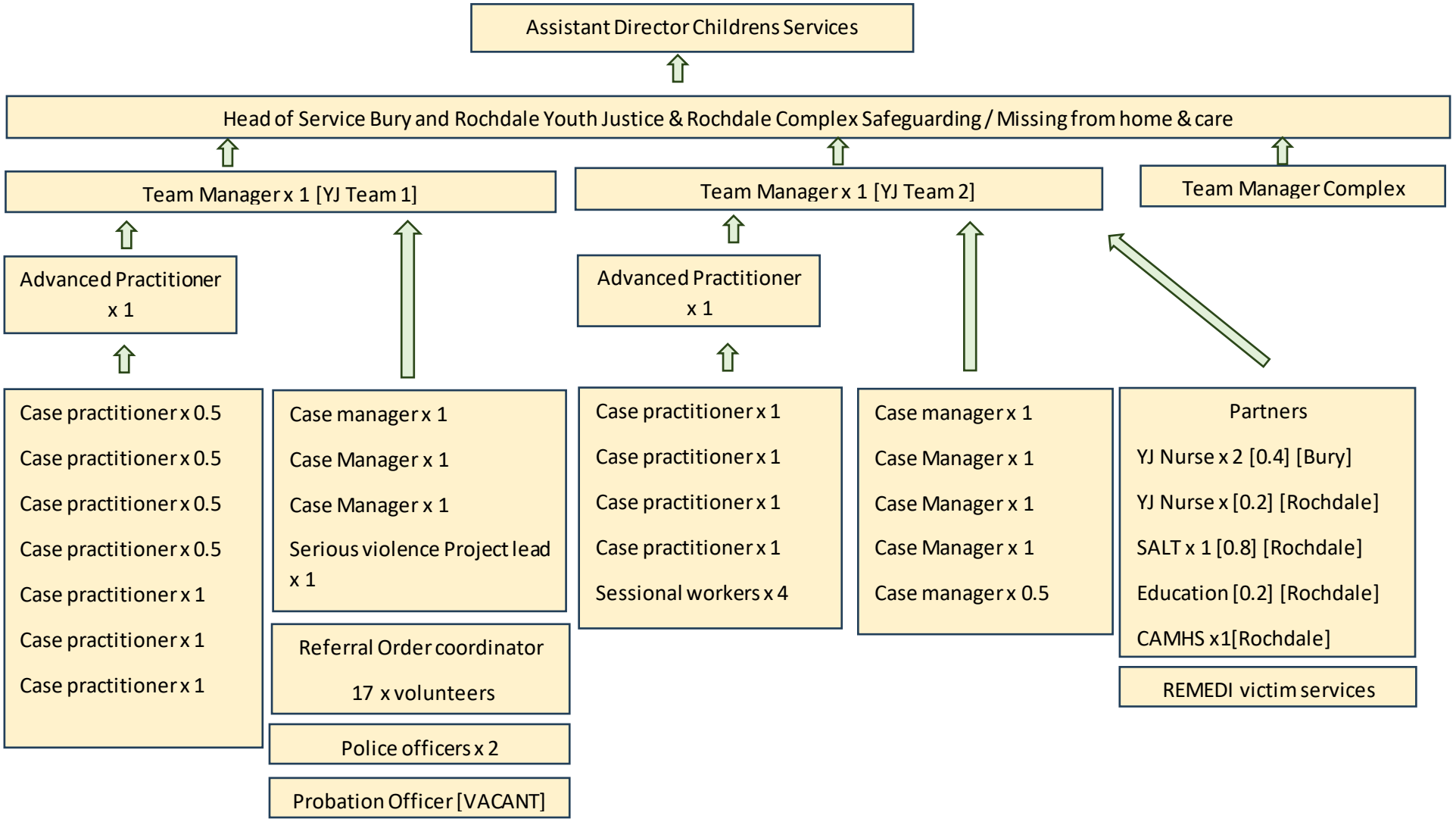
Assistant Director Children Services Rochdale

Co- Chair Youth Justice Management Board

Signature

Date

Appendix 1: Staffing Structure



Appendix 1: Staff & social graces

Gender	Number	Ethnicity	Number	Disability	Number
Male	10	White	21	Yes	-
Female	16	Asian	3	No	19
Other	-	Black	-	No answered	7
Not answered	-	Dual Heritage	2		
		Other	-		

Appendix 2: Funding

Expenditure	Salaries	Activity cost	Overheads	Total Expenditure
YJB Grant Rochdale	£629,295.00			**£629,295.00**
Bury Contribution	£833,788.47			
LA Rochdale	£717,042.90	£90,224.00	£416,216.44	**£1,233,483.34**
Police	£35,000.00			**£35,000.00**
Probation	£3,500.00			**£3,500.00**
Health	£15,000.00			**£15,000.00**
Total	£2,233,626.37	£90,224.00	£416,216.44	**£1,916,278.34**

MINUTES OF THE MEETING OF THE ASSOCIATION OF GREATER MANCHESTER AUTHORITIES EXECUTIVE BOARD HELD ON 22 AUGUST 2025

PRESENT:

GMCA Deputy Mayor	City Mayor Paul Dennett (in the Chair)
Bolton	Councillor Akhtar Zaman
Bury	Councillor Lucy Smith
Manchester	Councillor Joanna Midgley
Oldham	Councillor Elaine Taylor
Rochdale	Councillor Neil Emmott
Salford	City Mayor Paul Dennett
Stockport	Councillor Mark Roberts
Tameside	Councillor Andrew McClaren
Trafford	Councillor Tom Ross
Wigan	Councillor David Molyneux

OFFICERS IN ATTENDANCE:

Group Chief Executive Officer	Caroline Simpson
Group Deputy Chief Executive	Andrew Lightfoot
Group Deputy Monitoring Officer	Melinda Edwards
Group Chief Finance Officer	Steve Wilson
Group Secretary	Sarah Horsman
Bolton	Sandra Brice
Bury	Paul Lakin
Manchester	Tom Stannard
Oldham	Emma Barton
Rochdale	Julie Murphy
Salford	John Searle
Stockport	Michael Cullen
Tameside	Harry Catherall
Trafford	Sara Todd
Wigan	Alison McKenzie-Folan
Office of the GM Mayor	Kevin Lee
TfGM	Steve Warrener

GMCA	Nicola Ward
GMCA	Lee Teasdale

AGMA 17/25 APOLOGIES

RESOLVED /-

That apologies be received from Councillor Nicolas Peel (Bolton), Councillor Eamonn O'Brien (Bury), Councillor Bev Craig (Manchester), Councillor Arooj Shah (Oldham), Councillor Eleanor Wills (Tameside), Deputy Mayor Kate Green, Sue Johnson (Bolton), Lynne Ridsdale (Bury), Shelley Kipling (Oldham), James Binks (Rochdale) & Melissa Caslake (Salford).

AGMA 18/25 CHAIRS ANNOUNCEMENTS AND URGENT BUSINESS

There were none.

AGMA 19/25 DECLARATIONS OF INTEREST

There were none.

AGMA 20/25 MINUTES OF THE MEETING HELD ON 27 JUNE 2025

RESOLVED /-

That the minutes of the AGMA Executive Board held on 27 June 2025 be approved.

AGMA 21/25 GREATER MANCHESTER PLANNING ADVISORY UNITS

Deputy Mayor Paul Dennett, Portfolio Leader for Housing First provided an update on the Greater Manchester Planning Advisory Units, in particular the Greater Manchester Archaeological Advisory Service (GMAAS).

RESOLVED /-

1. That the current position relating to the Greater Manchester Ecology Unit (GMEU), Waste and Minerals and Flood and Water management be noted.
2. That it be confirmed that funding is available for the Greater Manchester Archaeological Service unit for 2 years from April 2026 and it be requested that Salford City Council extend the existing contract with Salford University to host the Greater Manchester Archaeology Unit and associated AGMA budget from April 2026 until April 2028.
3. That a review take place of the funding arrangements for the 3 Planning Advisory Units and Flood Risk Co-Ordinator Post (1FTE) and a further report be brought back with proposed reforms in September to feed into the budget setting process for April 2026.

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MINUTES OF THE MEETING OF THE GREATER MANCHESTER COMBINED AUTHORITY HELD ON FRIDAY 28th NOVEMBER 2025 AT BURY TOWN HALL

PRESENT

GMCA Mayor	Andy Burnham (In the Chair)
GMCA	Deputy Mayor Kate Green
Bolton	Councillor Nicholas Peel
Bury	Councillor Lucy Smith
Manchester	Councillor Bev Craig
Oldham	Councillor Arooj Shah
Rochdale	Councillor Neil Emmott
Salford	City Mayor Paul Dennett
Stockport	Councillor Mark Roberts
Tameside	Councillor Eleanor Wills
Trafford	Councillor Tom Ross
Wigan	Councillor David Molyneux

ALSO IN ATTENDANCE:

Chair of GM Overview & Scrutiny	Councillor John Walsh

OFFICERS IN ATTENDANCE:

Group Chief Executive Officer	Caroline Simpson
Group Deputy Chief Executive	Andrew Lightfoot
Group Solicitor & Monitoring Officer	Gill Duckworth
Group Chief Finance Officer	Steve Wilson
Secretary	Sarah Horseman
Bolton	Sue Johnson
Bury	Lynne Ridsdale
Manchester	Tom Stannard
Oldham	Shelley Kipling
Rochdale	Kiama Thompson
Salford	Stephen Young

Stockport	Paul Richards
Tameside	Emma Alexander
Trafford	Sara Todd
Wigan	Alison McKenzie-Folan
Office of the GM Mayor	Kevin Lee
TfGM	Martin Lax
TfGM	Steve Warrener
GMCA	Sylvia Welsh
GMCA	Lee Teasdale

GMCA 151/25 APOLOGIES

That apologies be received and noted from Councillor Eamonn O'Brien (Bury), James Binks (Rochdale) & Michael Cullen (Stockport).

GMCA 152/25 CHAIRS ANNOUCEMENTS AND URGENT BUSINESS

Andy Burnham, Mayor of Greater Manchester, opened by reflecting on the Autumn Budget announcements that had taken place the previous week. It was felt that this was a budget that helped to set up the region for a forthcoming decade of good growth in line with the aims of the Good Growth Plan. Of particular note was the announcement on the ending of the two-child benefit cap which could have a significant impact on lifting thousands of Greater Manchester children out of poverty.

He also highlighted the announcement that Greater Manchester was a region that would be given permission to introduce an overnight visitor levy. This would allow the region to raise more funds for itself and react more quickly in line with the aims of the Good Growth Fund. It was reported that the Group Chief Executive had been requested to convene a working group to consider how best to go about establishing an overnight visitor levy ahead of government consultation.

The second trial period of unlimited concessionary pass travel on Bee Network buses was due to conclude on 30 November, and TfGM had been requested to prepare a

report for the December meeting to allow the GMCA to take a decision on how to proceed in the new year.

Sunday 7 December would see the introduction of rail fare simplification within Greater Manchester and Greater Manchester Local Authorities were requested to actively promote this within their areas. The introduction of this simplification of fares would result in savings for over 50% of rail users within GM. This was another positive step towards rail integration within the Bee Network.

The GMCA expressed its congratulations to Councillor Arooj Shah, who had recently been the recipient of the Leader of the Year Award at the 2025 Local Government Information Unit and CCLA Investment Awards. This was a deserved honour and reflected the considerable hard work and strength Councillor Shah had shown as the Leader of Oldham Council.

RESOLVED /-

1. That the update on the Autumn Budget 2025 announcements and their impact upon the region be received.
2. That the establishment of a working group to consider how best to go about establishing an overnight visitor levy be approved.
3. That the announcement within the Autumn Budget that the two-child benefit cap was to be scrapped, and the impact that this would have in lifting households out of poverty in the region be welcomed.
4. That a report be submitted to the December meeting of the GMCA on the evaluation of the trial of unlimited concessionary pass travel on Bee Network buses.
5. That all GM Local Authorities be requested to actively promote the introduction of simpler rail fares within Greater Manchester being introduced on Sunday 7th December.
6. That the GMCA record its congratulations to Councillor Arooj Shah following her Leader of the Year Award at the 2025 Local Government Information Unit and CCLA Investment Awards.

GMCA 153/25 DECLARATIONS OF INTEREST

RESOLVED /-

That Andy Burnham, Mayor of Greater Manchester, declared an interest in Item 7C – Electric Vehicle Charging.

GMCA 154/25 GMCA MINUTES 26 SEPTEMBER 2025

RESOLVED /-

That the minutes of the GMCA held on 26 September 2025 be approved.

GMCA 155/25 GMCA WASTE & RECYCLING COMMITTEE MINUTES 8 OCTOBER 2025

RESOLVED /-

That the proceedings of the meeting of the GMCA Waste & Recycling Committee held on 8 October 2025 be noted.

GMCA 156/25 MINUTES OF THE GMCA OVERVIEW & SCRUTINY COMMITTEE MEETINGS HELD ON 24 SEPTEMBER & 29 OCTOBER 2025

RESOLVED /-

That the proceedings of the meeting of the GMCA Overview & Scrutiny Committee meetings held on 24 September and 29 October 2025 be noted.

GMCA 157/25 MINUTES OF THE BEE NETWORK COMMITTEE HELD ON 25 SEPTEMBER 2025

RESOLVED /-

That the proceedings of the meeting of the Bee Network Committee meeting held on 25 September 2025 be noted.

GMCA 158/25 THE GREATER MANCHESTER STRATEGY DELIVERY PLAN

Andy Burnham, Mayor of Greater Manchester & Group Chief Executive, Caroline Simpson, presented the draft Greater Manchester Strategy (GMS) delivery plan headlines to GMCA prior to publishing a live version. The report also summarised the feedback received from stakeholders and described the links between the GMS, Delivery Plan and other Greater Manchester strategies.

The report highlighted how the whole system across the region was being brought together to deliver the ambition agreed through the GMS. There was clarity around the achievements sought over the 10 year period to deliver the best outcomes for the people, business, economy and quality of life within the region, with absolutely clarity on what that would mean in metric terms, and the progress the whole system would need to make at each stage of the process to deliver on the seven GMS priorities.

Councillor John Walsh, the Chair of the GMCA Overview and Scrutiny Committee was invited to highlight comments made by the Committee.

It was reported that the Overview and Scrutiny members had welcomed the level of ambition in the GMS but had expressed concern about whether the delivery capacity could match the scale of those goals. Reassurance was also around the strength of stakeholder engagement and the ability to take ownership of the ambitions. Members also raised issues around outdated infrastructure requirements in planning applications; and the need for the Strategy to actively address inequalities between boroughs, particularly in areas such as child poverty and housing.

The comments and constructive challenge from Overview & Scrutiny were welcomed and work was taking place to ensure that delivery capacity was appropriately stress

tested and any gaps in capacity identified. Stakeholder engagement had been very strong to date with considerable levels of involvement in the development to date, but it was appreciated that more could always be done around this and stakeholders would be involved directly at every stage.

RESOLVED /-

1. That the GMS delivery plan headlines be approved.
2. That the feedback received from stakeholders across the Greater Manchester system, which has been addressed in the final draft, be noted.
3. That the link between the GMS Delivery plan and the other papers being reviewed at today's meeting, be noted.
4. That the comments made by the GMCA Overview & Scrutiny Committee at its meeting on 26 November 2025 be received.

GMCA 159/25 GREATER MANCHESTER LOCAL GROWTH PLAN

Councillor Bev Craig, Portfolio Leader for Economy, Business & Inclusive Growth, presented a report updating Members on the Government requirement to produce a GM Local Growth Plan and to approve the draft plan developed in line with the Greater Manchester Strategy.

RESOLVED /-

That the GM Local Growth Plan be noted and approved.

GMCA 160/25 GREATER MANCHESTER GOOD GROWTH FUND AND INTEGRATED PIPELINE

Councillor David Molyneux, Portfolio Leader for Investment & Resources, presented a report requesting approval for the first allocation of capital of c£400m from the newly created Good Growth Fund investment pot, which would unlock a further £1.3bn of investment and deliver 2,945 new homes and over 2 million sq ft of employment space.

The Fund was considered to be a ‘game changer’ for the region, and strongly echoed the sentiment that the region could only truly succeed if all of Greater Manchester’s Local Authorities were feeling the benefit of growth, and the first 17 funding allocations detailed within the report were a reflection of this. The first decade of the GMCA had seen good levels of growth, but the Good Growth Fund would now take this to the next level, where nationally and internationally it would be evident that investors were looking north and realising that Greater Manchester was the best place to invest within the UK. It was also noted that these projects were just the start, forming £400m of what was a total of over £1bn of investment.

Councillor Peel highlighted the success of a launch event that had taken place at Bolton Wanderers stadium and had been attended by a wide array of investors and developers. There had been positive and robust conversations throughout the event, with questions raised around why the Bolton/Wigan corridor should be invested in over other areas of the region. The answer to that was quite simple, that Greater Manchester was not competing internally within itself, but rather working together to bring further investment to the region as a whole. This collaboration would be incredibly important and showed the maturity of approach within Greater Manchester.

Members also highlighted the welcomed the plans around transport infrastructure being used to support developments to lift areas out of previously entrenched decline; the success of the initial launch event in Stockport; the ability to deliver much needed social homes; the ability to show how GM can truly be ‘one family’; the willingness to emphasise delivering for place over politics; the fact that the Fund still prioritised green commitments; and the ability of the Fund to provide necessary growth within the centre that would help to fund even further regeneration for all corners of the region.

Councillor John Walsh, the Chair of the GMCA Overview and Scrutiny Committee was invited to highlight comments made by the Committee. Members had strongly welcomed the Fund but were keen to ensure that every scheme contributed towards ambitions around mitigating climate change impacts and closing the inequality gap. There was a general comfort with the level of risk to balance future growth but still sought further detail on how good growth could be truly defined, whilst the requirements had been established in principle, it was suggested that each scheme

needed further challenge to ensure that all components for good growth were included within proposals.

Mayor Burnham welcomed the comments and noted concerns raised at the OSC meeting around whether the Committee had the skills of oversight necessary to unpack some of the more detailed financial aspects of the Fund. This did open up the question of what an oversight mechanism for the Good Growth Fund beyond the Combined Authority meetings should look like. Officers were being asked to look into proposals around this valid concern.

Mayor Burnham advised that a letter had been received from the government in the past week following the culmination of the task & finish process that had been run with various government departments throughout the summer. The outcomes had been very positive, with a particular highlight around the governments wish to see the Ashton & Stalybridge transport corridor as the UK's first transport led town centre regeneration project.

RESOLVED /-

1. That the progress made in developing the Greater Manchester Good Growth Fund and Greater Manchester Integrated Pipeline, since the original launch in May be noted.
2. That the revised approach to investment be approved and that the emerging governance process noted.
3. That the intention, that the revised approach to investment will be supported by the Greater Manchester Good Growth Fund, for which initial capacity, subject to approval of the borrowing outlined at recommendation 4, was in excess of £1bn be noted.
4. That GMCA borrowing up to £150m against future Retained Business Rates, for investment into the integrated pipeline**,** be approved.
5. That the prioritisation methodologies used to appraise the initial funding allocations recommended, as set out in Appendix 1, be approved.
6. That the indicative allocation of funding to the recommended housing and employment projects, as set out within this report, be approved.
7. That the alignment with the GMCA budgets setting process be noted.

8. That the opportunity to leverage social value through the investment pipeline supply chain be noted,
9. That the changes to the Stockport Interchange loan, as set out in the report, be approved.
10. That the comments made by the GMCA Overview & Scrutiny Committee be received.
11. That the letter received from Government on the Task & Finish process be noted.

GMCA 161/25 LOCAL INNOVATION PARTNERSHIP FUND

Councillor Bev Craig, Portfolio Leader for Economy, Business & Inclusive Growth, provided an update on the development of the national Local Innovation Partnerships Fund (LIPF), the successor fund to the Innovation Accelerator pilot, and to agree arrangements for the development and allocation of the Fund by the Innovation Greater Manchester Board (IGM).

This would allow the region to continue to be an innovation led economy building about previous successes and would put a framework around how to ensure the spending was within the parameters of the key innovation intensive areas of the economy. This was about setting out the process at this stage rather than the allocation of funding.

RESOLVED /-

1. That the information on the LIPF, the decisions and processes required for its successful allocation and delivery, and the roles and responsibilities of UKRI, IGM and GMCA be noted.
2. That the role of the representatives of the GMCA who are members of IGM, who will participate fully (on behalf of the GMCA) in that Board's discussions and decisions on the elements of the co-design and allocation of the LIPF for which IGM is responsible be noted.
3. That subject to IGM taking the decision to pass additional responsibilities in managing the LIPF to the GMCA on its behalf, that delegation be approved to the Group Chief Executive Officer, in consultation with the GMCA

Portfolio Lead and Portfolio Lead Chief Executive for Economy, Business and Inclusive Growth, the decision-making authority for: the process of allocating the LIPF, the selection of interventions to be recommended to UKRI to be funded, and - as required - to accept and award grants to successful local projects on behalf of IGM and UKRI.

GMCA 162/25 DRAFT LOCAL TRANSPORT PLAN – GREATER MANCHESTER TRANSPORT STRATEGY 2050 AND DELIVERY PLAN

Andy Burnham, Mayor of Greater Manchester, presented a report setting out the final drafts of the Greater Manchester Transport Strategy 2050 and Delivery Plan, seeking formal approval to consult on them. It was advised that the consultation would commence in December to allow for time to re-draft to incorporate the comments highlighted by the Overview and Scrutiny Committee.

The Local Transport Plan (LTP) emphasised the ambition to move towards a 50/50 mix of public transport/active travel and private vehicle usage and it was vital that the region began to echo similar sized regions throughout Europe that provided many alternatives to taking cars into the very centre of the city region. The Plan also emphasised the need for more public transport orbital connectivity throughout the region and not require people to have to travel via the centre to reach other outer communities.

Councillor John Walsh, the Chair of the GM Overview and Scrutiny Committee was invited to highlight comments made by the Committee. Whilst the Committee had recognised the hard work that had formed the development of the LTP, there had been significant disappointment that the Draft Plan did not emphasise the importance of feeling safe on the network, particularly in the case of women and girls, which had been the recent subject of an extensive Task & Finish Group exercise, and it was welcomed that a redrafting was taking place to bring more emphasis to this vitally important aspect.

The Committee also commented on concerns that the 50/50 ‘right mix’ approach might not be appropriate to all parts of the region and that it should be kept under regular review. Concerns had also been raised that local authority Bee Network

Committees needed to be active and kept engaged throughout the whole process, as did the wider community, as the LTP needed to reflect the needs of all residents of the region.

Deputy Mayor for Safer & Stronger Communities, Kate Green, echoed the concerns raised around the safety of women and girls on network, stating that people would not come to the region if they did not feel they could move around the city region safely and therefore this was an absolutely imperative part of the LTP to emphasise. The network was very safe statistically, but it was vital to provide constant reassurances to passengers, and put infrastructure, messaging and staffing in place to ensure this.

Members raised concerns around the local Bee Network Committees being put in place and the ensuring of a clear connect between the central planning of TfGM and these local committees. It was vital that these acted as a conduit between the travelling public and the decision-making hierarchy at TfGM. Collaboration was key to ensuring a localism led approach to redesigning bus routes for example.

TfGM officers confirmed that an immediate re-draft of the Draft Plan was taking place to reflect the need to incorporate more detail around the safety and women and girls on the network, and that this would be shared for comment with relevant members of the GMCA Overview and Scrutiny Committee Task & Finish Group.

RESOLVED /-

1. That the Draft GM Transport Strategy 2050 and the Draft GM Transport Delivery Plan (2027-2037) be endorsed.
2. That the commencement of a public consultation exercise on the Draft GM Transport Strategy 2050 and the Draft GM Transport Delivery Plan (2027-2037) be approved.
3. That authority be delegated to the GMCA Group Chief Executive, in consultation with the GM Mayor, to finalise the consultation materials, including the ‘Summary’ (of the Draft Transport Strategy and Draft Delivery Plan) that will support the consultation.
4. That the proposed consultation period, and the associated engagement plan and the proposed consultation materials be noted.

5. That it be noted that the Draft Transport Strategy and Draft Delivery Plan were supported by an Evidence Base, Policy Documents and an Integrated Appraisal that will also be publicly available as part of the public consultation.
6. That the comments made by the GMCA Overview and Scrutiny Committee be received.
7. That it be noted that there will be a re-draft of the report to reflect the need to incorporate more detail around ensuring the safety and women and girls on the network, and that this would be shared for comment with relevant members of the GMCA Overview and Scrutiny Committee Task & Finish Group.
8. That authority be delegated to the Group Chief Executive in consultation with the GM Mayor, to approve of the re-drafted Local Transport Plan.

GMCA 163/25 GET GREATER MANCHESTER WORKING PLAN

Sara Todd, Portfolio Lead Chief Executive for Education, Work and Skills, presented a report setting out an overview of the Get Greater Manchester Working Plan, which built out from the Greater Manchester Strategy (GMS) workstreams of: Clear Line of Sight to High Quality Jobs, Everyday Support in Every Neighbourhood and Great Place to do Business.

The Plan set out a 10-year vision to reduce unemployment and economic inactivity across the region. At its heart was the ambition to raise the employment from the current 71.8% to 80% to close the gap with the national average.

Members made reference to the construction industry and the vital need to increase capacity in terms of skills within the sector. Collective working across the 10 authorities could pressure the government to put on focus on upskilling across this sector to meet future need.

RESOLVED /-

That the Get Greater Manchester Working Plan be approved for publication in December 2025 and support the CA to continue work with system partners to drive this work forward.

GMCA 164/25 HOUSING FIRST: STRENGTHENING HOUSING STANARDS; PROPERTY CHECK PROGRAMME PROGESS & ENFORCEMENT TRAINEE PROGRAMME EXPANSION

Deputy Mayor Paul Dennett, Portfolio Leader for Housing First, provided an update on the progress of Greater Manchester's Property Check Programme, which sought to ensure all renters could request a property check by 2030. The report also highlighted recent actions to expand council capacity, the impact of new legislation making property checks easier, and ongoing efforts to improve standards in the private rented sector.

This was an essential mechanism for renters, as government statistics gathered in 2020 had show that 12% of GM's private rented homes had serious category 1 hazards and 58,564 homes fell below the decent homes standard.

Deputy Mayor, Kate Green, made reference to the Eccles pilot scheme. This had been an ambition for some time to make use of the trust in Greater Manchester Fire and Rescue Service who are able to enter people's homes to undertake fire and safety assessments and through the Eccles pilot, now extending the range of activities they can undertake such as checking for damp, for electrical hazards and trip/fall risks. 188 property checks had taken place across the two months of this pilot from Eccles Fire Station alone, which showed the impact that these checks could have if rolled out across the wider region. The current pilot would continue to run until March 2026 when the results would be considered for the next steps, but the current picture was very encouraging.

RESOLVED /-

1. That approval be given for the use of Retained Business Rates to deliver a new Housing Enforcement Trainee Programme cohort, in line with paragraph 2.7.
2. That the update on the previous trainee programme be noted.
3. That formal thanks be issued to the Bishop of Manchester for his work to secure an amendment to the Renters' Rights Act to reduce the risk to tenants of asking for a property check and make it easier for councils to carry them out.
4. That the other actions taken as part of the Property Check Programme since June 2025 be noted.

GMCA 165/25 HOUSING FIRST: TACKLING SUPPLY OF TEMPORARY ACCOMMODATION THROUGH EMPTY HOMES AND LEASING PROGRAMME

Deputy Mayor Paul Dennett, Portfolio Lead for Housing First, presented a report setting out a programme for the new supply of temporary accommodation, designed to improve value for money and reduce reliance on unsuitable, 'ad hoc' temporary accommodation placements in Greater Manchester.

RESOLVED /-

1. That the deployment of £911,213 in 2026/27 to engage 17x Empty Homes Officers across Greater Manchester be approved.
2. That the deployment of £10,568,100 in 2026/27 as a comprehensive lease and repair programme to bring 400 properties back into use be approved.
3. That approval be given to the continuation of the GM Temporary Accommodation Observatory (£206k), providing GMCA and localities with intelligence on TA usage and spend.

GMCA 166/25 HOUSING FIRST: GREATER MANCHESTER NHS & GREATER MANCHESTER HOUSING PROVIDERS GM TRIPARTITE AGREEMENT

Deputy Mayor Paul Dennett, Portfolio Lead for Housing First, presented a report providing an overview of the Greater Manchester Tripartite Agreement, the partnership plan that connected GMCA to NHS GM Integrated Care and GM Housing Provider partnership on joint ambitions on housing, health and growth.

RESOLVED /-

1. That the GM Tripartite Partnership Agreement be approved.
2. That the proposal for the GMCA to become a signatory alongside NHS Greater Manchester Integrated Care and GM Housing Providers be approved.

GMCA 167/25 TFGM EXECUTIVE BOARD APPOINTMENTS

Andy Burnham, Mayor of Greater Manchester, presented a report requesting members to approve Non-Executive Director appointments to the Executive Board of Transport for Greater Manchester (TfGM).

RESOLVED /-

1. That it be noted that Tracey Matthews will step down as Non-Executive Director of TfGM on 31 January 2026
2. That the appointment of Tanya Coff as a Non-Executive Director of TfGM for an initial three-year term from 1 February 2026 until 31 January 2029 be approved
3. That extension to the appointment of Jo Kaye as Non-Executive Director of TfGM for a third, and final, three-year term from 1 February 2026 until 31 January 2029 be approved; and
4. That authority be delegated to the Group Chief Executive, GMCA to formalise the terms of these appointments.

GMCA 168/25 GREATER MANCHESTER TAXI REVIEW: TRADE ENGAGEMENT AND LICENSING MODEL

Andy Burnham, Mayor of Greater Manchester, presented the outcomes of an independent review and engagement with the taxi trade; including an update on the Department for Transport's response to the Casey Audit recommendations; and describing a new proposed clause in the English Devolution and Community Empowerment Bill to resolve issues with out-of-area taxis.

It was advised that the Hackney Fund was due to go live on 8 December 2025, and all relevant information would be circulated in advance.

Members were discouraged by the discussion that had taken place in parliament in the past week around out of area working in the taxi trade. The amendment to the English Devolution & Community Empowerment Bill that had been tabled by Elsie Blundell MP seeking the end to loopholes allowing taxi drivers to seek licences within authorities some distance from the authorities in which they operated had been

strongly welcomed, but the government indicated that they would not progress with the amendment at this time.

This went against the Baroness Casey Review undertaken in the summer which had strongly recommended the ceasing of these practices to strengthen safety. The GMCA would now seek with work with a GM based member of the House of Lords to bring this amendment into the discussion on the Bill in that chamber. The Greater Manchester taxi trade was united in supporting this amendment becoming part of the Bill.

RESOLVED /-

1. That the key findings of the Greater Manchester Taxi review be noted.
2. That it be noted that the findings of the Greater Manchester Taxi review will be used to inform a GM response to a future government consultation on taxi powers.
3. That it be noted that the need remains for an appropriate legislative framework to address out-of-area licensing concerns.
4. That the proposed clause to amend the English Devolution and Community Empowerment Bill to limit out-of-area working be noted.
5. That the exploration of a potential Greater Manchester taxi licensing model, to ensure that, if legislative reform occurs, the impacts and implications of this approach are thoroughly understood, be endorsed.
6. That Greater Manchester Local Authorities be recommended to continue to actively review policy standards and processes to deliver improvements where possible.
7. That the establishment of a taxi industry working group, led by the Transport Commissioner, to support alignment with the Bee Network and, publish summaries of key discussions to keep the trade informed, be endorsed.
8. That exploration of a fund to assist private hire vehicle owners in upgrading their vehicles to meet emission standards during the 2026/27 GMCA Budget setting process, be endorsed.
9. That it be noted that the Hackney Fund will go live on 8 December 2025.

10. That an update be received on the further work taking place to seek amendment to the English Devolution & Community Empowerment Bill to end out of area licensing of private hire vehicles.

GMCA 169/25 ELECTRIC VEHICLE CHARGING PRICING

Mayor Andy Burnham left the meeting for this item due to an interest declared in GMCA 153/25. Deputy Mayor, Paul Dennett, took the Chair for this item.

Deputy Mayor Paul Dennett, Portfolio Lead for Housing First, presented an update seeking approval to enhance pricing flexibility for the publicly owned electric vehicle (EV) charging infrastructure. The aim was to ensure the publicly owned EV infrastructure, part of the Be.EV network, remained responsive to market conditions while upholding a commitment to fair, consumer-focused pricing.

RESOLVED /-

1. That the agreement be given to the delegation of the function of making all tariff pricing decisions for the publicly owned electric vehicle infrastructure, (managed and operated by Iduna Infrastructure Ltd as part of the Be.EV network) to Transport for Greater Manchester; and
2. That it be agreed that Transport for Greater Manchester will report on the outcomes of all tariff pricing decisions as part of the Quarterly Revenue Monitoring reports to the GMCA.

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