AGENDA FOR

OVERVIEW AND SCRUTINY COMMITTEE

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To: All Members of Overview and Scrutiny Committee

Councillors : D Vernon (Chair), J Southworth, M Rahimov, A Arif, T Pilkington, D Green, T Rafiq, E Moss, C Birchmore, G Marsden and J Harris

Dear Member/Colleague

Overview and Scrutiny Committee

You are invited to attend a meeting of the Overview and Scrutiny Committee which will be held as follows: -

Date:	Tuesday, 10 February 2026
Place:	Peel Room, Bury Town Hall
Time:	7.00 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:	**Please note this meeting is being Livestreamed**

AGENDA

1 APOLOGIES

2 DECLARATIONS OF INTEREST

Members of the Overview and Scrutiny Committee are asked to consider whether they have an interest in any matters on the agenda and, if so, to formally declare that interest.

3 MINUTES *(Pages 5 - 10)*

Minutes from the meeting held on 9th December 2025 are attached.

4 PUBLIC QUESTION TIME

A period of 30 minutes has been set aside for members of the public to ask questions on matters considered at the last meeting and set out in the minutes or on the agenda for tonight's meeting.

5 MEMBER QUESTION TIME

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

6 ANNUAL HRA BUDGET 2026/27 & RENT SETTING *(Pages 11 - 42)*

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

7 THE COUNCIL'S 2026/27 REVENUE BUDGET AND MEDIUM-TERM FINANCIAL STRATEGY (MTFS) FOR 2027/28 THROUGH TO 2028/29 *(Pages 43 - 168)*

Report and appendices from the Deputy Leader and Cabinet Member for Finance and Transformation are attached.

8 WALSHAW DEVELOPMENT FRAMEWORK *(Pages 169 - 280)*

Report from the Council Leader Councillor E O'Brien Cabinet Member for Strategic Growth is attached

9 SIMISTER AND BOWLEE DEVELOPMENT FRAMEWORK *(Pages 281 - 414)*

Report from the Council Leader Councillor E O'Brien Cabinet Member for Strategic Growth is attached

10 ELTON RESERVOIR DEVELOPMENT FRAMEWORK *(Pages 415 - 562)*

Report from the Leader Councillor E O'Brien Cabinet member for Strategic Growth

11 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 3

Minutes of: **OVERVIEW AND SCRUTINY COMMITTEE**

Date of Meeting: 9 December 2025

Present: Councillor (in the Chair)
Councillors D Vernon, M Rahimov, A Arif, T Rafiq, E Moss, C Birchmore, G Marsden, J Harris and G Staples-Jones

Public Attendance: No members of the public were present at the meeting.

Apologies for Absence: Councillor J Southworth and Councillor D Green

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OSC.78 APOLOGIES

Apologies are noted above

OSC.79 DECLARATIONS OF INTEREST

There were no declarations of interest.

OSC.80 PUBLIC QUESTION TIME

There were no public questions.

OSC.81 MEMBER QUESTION TIME

There were no Member questions.

OSC.82 MINUTES

That the minutes of the meeting held on 25th November 2025 be approved as a correct record and signed by the Chair.

OSC.83 DRAFT 2026/27 REVENUE BUDGET

A written report from Councillor Thorpe, Deputy Leader and Cabinet Member for Finance and Transformation, was circulated ahead of the meeting. The Chair invited Cllr Thorpe to present a brief overview of the report.

Cllr Thorpe outlined the latest budget position. He reported that the forecast funding gap at the time of reporting was £9.6m. Since quarter one, additional spending pressures of approximately £4m had emerged, notably from inflation and the National Living Wage, which were impacting staffing costs and adult social care. Coupled with rising demand pressures in both children's and adults' services, the overall gap at points in the year had risen towards c.£16m before mitigation. A zero-based budgeting exercise had been undertaken in a more forensic manner than previously, identifying both pressures and opportunities. To date, the Council had identified around £8.5m of savings, particularly around commissioning and within the Place Directorate, with further work under way to establish delivery detail. Members were advised that the local government finance settlement was expected on 17–18 December, and until the final figures were known the Council was prudently presenting a one-year MTFS.

Cllr Birchmore asked about the funding review referenced on page 16 and how confident officers were that the assumptions would be met. In response, Cllr Thorpe reiterated that the settlement was expected around 17–18 December and that, based on professional judgement and triangulation across several sources, current assumptions remained appropriate pending confirmation. Cllr Birchmore queried whether the National Insurance contributions funding from government was a one-off and not to be repeated in the current year. Cllr Thorpe advised that the working assumption was that fair funding and related elements would be amalgamated within the wider settlement. When asked whether the Council would be "better off" after the settlement given the new pressures, Cllr Thorpe stressed the scale of the pressures across the budget.

Cllr Moss referred to recommendation 8 and sought clarity on the consultation process: who was being consulted (public or staff) and what would happen after the consultation, noting paragraph 10 regarding the remaining budget gap and potential further budget reductions. Cllr Thorpe urged all members to participate, explaining that the consultation was open to anyone living in Bury as well as to staff. He distinguished between operational management decisions and policy choices with wider community impact, noting that the consultation aimed to encapsulate potential proposals from across the three directorates in accessible terms. Cllr Moss recorded that the consultation was running until 19 January. Cllr Vernon asked whether suggestions made during consultation that proposed alternatives to budget measures would be actively considered. Cllr Thorpe confirmed that the Council could not set the full budget until the settlement was received but was keen to hear residents' and staff views and would listen to further proposals.

The Executive Director of Finance, Neil Kissock, added that consultation feedback would be collated in the new year and considered alongside any further proposals when setting the budget. Where consultation necessitated specific changes or additional proposals, these would be brought forward accordingly.

Cllr Moss sought clarification on the financial table at page 11 (paragraph 21), stating they did not understand the outturn and the figure on the bottom line in relation to the funding position. Cllr Thorpe explained that the table presented projections to year-end and noted that there appeared to be an error in the report table which would be corrected.

Cllr Harris asked about the potential impact of a new funding formula, expressing concern at the draw on reserves and the realism of closing the gap without structural change, while hoping the funding formula might assist. Cllr Thorpe advised that, following the next year's Budget Council, the Council would need to sustain a strategic focus on the most impacted areas—children's services, adult social care, and temporary accommodation. He referenced work already under way, including exploration of building Council-run children's homes due to insufficient foster carer capacity, and efforts to "step down" children where appropriate. He cautioned that, while work continued, the demand trajectory had not yet turned. In adult social care, savings were being pursued through outcomes-focused practice and the zero-based budgeting exercise, recognising the high stakes involved given vulnerable service users.

On workforce costs, Cllr Harris highlighted agency staffing as a significant pressure and asked how reliance could be reduced. Cllr Thorpe said higher-than-average costs would need clear justification and that, in children's social care in particular, excessive agency use could drive poorer outcomes as well as higher costs. He reported that well over 80% of the children's workforce was now permanent, which was positive, but accepted there remained areas where agency use was still necessary and required a robust approach.

Cllr Staples-Jones commented on the cultural challenges and asked whether officers felt confident about achieving the required savings. Kate Waterhouse executive director strategy

and Transformation responded that she was well aware of the Council's needs and emphasised the importance of closing the gap while exploring invest-to-save opportunities. Cllr Thorpe supported this view, noting that the sector faced significant challenges and that cultural change was difficult to achieve quickly. Cllr Staples-Jones raised concerns about responsiveness to complaints; Cllr Thorpe confirmed that the Member Assurance Group had been established to underpin improvements.

Cllr Rahimov referred to page 10 and queried the overspend on children's home-to-school transport, asking what actions were planned to address demand without compromising safeguarding. Cllr Thorpe said work was ongoing at GM level to improve commissioning and management. Cllr Rahimov requested further information when this work was underway (Action). He also expressed frustration about difficulties automating payments for this service; Cllr Thorpe noted that TfGM was being lobbied by all GM councils and this work needed to continue. Cllr Vernon asked whether economies of scale through TfGM were being considered.

Cllr Arif asked about treasury management assumptions and the impact of interest rate fluctuations. Neil Kissock explained that impacts could be positive or negative depending on business rates and short- and long-term interest rates, and highlighted opportunities arising from debt management. Cllr Moss queried paragraph 38 and the figures at 9.612, noting that paragraph 21 had originally forecast a £5.8m shortfall and £4.1m overspend, and asked what had changed. Cllr Thorpe explained that the structural gap for the three-year MTFS remained, but assumptions and demand pressures had shifted. Neil Kissock confirmed that the £9.6m position reflected updated demand pressures and additional growth assumptions, with trend analysis factored in
for 2026–27.

Further discussion covered the fair funding formula, business rates reset, and council tax assumptions. Cllr Arif asked about the proposed 4.99% council tax increase and its justification. Cllr Thorpe confirmed this was the maximum permissible without a referendum. Neil Kissock added that all treasurers recommended this increase to maintain core spending power, noting improved collection rates and that Bury had the largest increase across GM.

Cllr Arif asked whether payments would be recovered through benefits and DWP; Neil Kissock confirmed that council tax discount and support schemes were in place. Cllr Birchmore queried the pay award assumptions (page 16), noting a 3% figure; Cllr Thorpe said negotiations with unions were ongoing and that a higher award would not be viable. Neil Kissock confirmed that the national pay agreement would determine the final position. Cllr Marsden asked about recommended business rate increases; Neil Kissock referred to the business rate reset and future allocation changes.

Cllr Vernon asked for a recap on reserves and the implications if they fell below target. Neil Kissock advised that uncommitted reserves stood at just under £20m, but once reserves were exhausted there would be no fallback. He stressed that while Bury was not in the same position as some councils, the budget gap and future years' pressures required careful management.

It Was Agreed/ Actions

- The Committee noted the update and the discussion
- Further information on GM-level work on home-to-school transport commissioning to be provided at a later date

OSC.84 COUNCIL IMPROVEMENT PLAN

A report from Councillor Thorpe, Deputy Leader and Cabinet Member for Finance and Transformation, was circulated ahead of the meeting. He provided a brief overview, explaining that the Council had received an unfavourable audit report and had developed an improvement plan in response. He noted that the work undertaken so far had already strengthened governance arrangements and created more robust decision-making structures.

Councillor Moss referred to page 31 of the report and asked about the workshop held in August. He queried the extent to which the outputs from that workshop were influencing the work of the Governance Boards, and whether the existence of multiple boards was genuinely improving the efficiency of decision-making or instead creating additional delays. In response, Councillor Thorpe reported that six-monthly reviews had been completed and that information from the Health and Safety Sub-Board showed that the new arrangements were not adding delays. Instead, they were elevating the quality of decision-making and providing stronger assurance. He emphasised that improvement is not a one-off exercise and that there remain areas of process that must continue to develop to improve outcomes for residents. He added that the time invested in the boards is an investment in better governance, and that the boards have already addressed key gaps and will continue to adapt as needed.

Councillor Moss then referred to Appendix 1, noting that many items on the tracker appeared to be marked as complete. He questioned whether this implied that the improvement plan was effectively finished, and how useful the tracker remained if the majority of its actions had already been delivered. Councillor Thorpe responded that although much progress had been made, the plan itself should not be seen as the final stage of improvement and further development work is expected.

Jacqui Dennis monitoring officer added that the boards are integral to ensuring good and efficient decision-making. She explained that the improvement plan had been put in place to address specific weaknesses identified during the audit, and that the boards now provide strong oversight, inputting at the right stages of the decision-making process. She confirmed that further work is expected to feed into the boards and that this will continue to align closely with Cabinet activity.

Councillor Moss asked whether there would be a further improvement plan in the future, noting that much depends on the findings of the external auditors when they return. Councillor Thorpe stated that the broader aim is to deliver better services for residents and that this work continues regardless of audit cycles.

Councillor Vernon asked whether the improvement plan would end once the auditors return or if the work would continue. Councillor Thorpe noted that some of the auditor's conclusions may be subjective and that further action might still be required depending on their assessment.
The committee acknowledged the progress made so far and the continuing work to strengthen governance and decision-making across the organisation.

It Was agreed:

- Update be noted

OSC.85 URGENT BUSINESS

There was no urgent business.

COUNCILLOR
Chair

(Note: The meeting started at 7.00 pm and ended at 10.00 pm)

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Agenda Item 6

Bury Council

Classification:	Decision Type:
Open	Key

Report to:	Overview & Scrutiny Committee Cabinet Council	**Date:** 10 February 2026 11 February 2026 25 February 2026
Subject:	Annual HRA Budget 2026/27 & Rent Setting	
Report of	Cabinet Member for Finance and Transformation	

Summary

1. In this report Cabinet is being asked to approve the Housing Revenue Account (HRA) Budget for the financial year 2026/27, including all relevant decisions affecting housing funding. This includes key decisions such as setting the housing rent and service charge increases for our Council tenants, which is critical as it effectively determines the financial envelope within which the HRA Business Plan is set, and against which we assess the costs of delivering Cabinet and Council's priorities within our operational plans.

2. Part of the main considerations for the housing service is to ensure that a focus is maintained on housing quality and compliance, within what is becoming an increasingly challenging regulatory environment, to maintain the existing stock to an acceptable standard, whilst seeking to decarbonise the stock wherever possible, and also ensuring the best use of those homes for some of the most vulnerable residents in the Borough.

3. This report seeks to update Members on the proposed Housing Revenue Account (HRA) Annual Revenue Budget and Capital Investment Plan Programme for 2026-27, including the proposed increases in rents, garage rents, service charges and any other relevant charges within the HRA for 2026/27. The recommendations included in this report will enable Cabinet and Council to set a balanced budget for the HRA for 2026/27 which is essential to lay the foundations for the HRA moving forward.

4. To ensure consistency with the General Fund Medium-Term Financial Strategy (MTFS), a three-year Medium-Term Financial Plan (MTFP) has been produced for the HRA. Similarly, the HRA elements of the Council's Capital Investment Plan also span an initial three-year period, in line with the Authority's overall Capital Investment Strategy. Although this report forms part of the overall budget report process for the Council, it has been kept separate from the General Fund to provide Members with an informed and transparent view of the

HRA's current state and challenges, which are different but no less than those for the General Fund.

5. In addition, this report also sets out the position in relation to the refresh of the HRA 30-year Business Plan, to inform Members of the severe long-term pressures facing the Housing Service, which are interpreted within the Business Plan. It highlights that actions are required now to start addressing some of those financial challenges, to lessen the financial and operational challenges that will be faced further down the line if appropriate action is not taken now.

Recommendation(s)

6. **Overview and Scrutiny Committee** is asked to note the report and consider whether they wish to make any recommendations to Cabinet on the content of this report.

7. **Cabinet** is asked to approve the following and commend to the Council:

- Approve the 2026/27 budget for the Housing Revenue Account
- Agree and approve the proposed HRA Capital Investment Plan for 2026/27.
- Approve the setting of individual social formula rents for 2026/27 based on the current National Social Rent Policy, giving a real rent increase of 4.8% with effect from 1st April 2026 (being September 2025 CPI (Consumer Price Index) 3.8% plus 1%).
- Approve the setting of individual actual affordable rents for 2026/27 based on the current National Social Rent Policy, giving a real rent increase of 4.8% with effect from 1st April 2026.
- Approve shared ownership rents to be increased by RPI (as at February 2026) plus 0.5% in line with provisions set out within shared ownership agreements with effect from 1st April 2026.
- Approve an increase in Garage rents of 4.8% with effect from 1st April 2026.
- Approve an increase in Sheltered Management and Support Charges of 4.8% from 1st April 2026.
- Approve an increase in Service and Amenity Charges of 4.8% from 1st April 2026.
- Approve an increase in Support and Heating charges of 4.8% from 1st April 2026.
- Approve an increase in Furnished Tenancy charges of 4.8% from 1st April 2026.
- Approve continuation of the policy that when a social rent property is re-let to a new or transferring tenant the rent level will be revised to match the formula rent (target rent) for that property.
- Note in accordance with the Rent Standard, that where an affordable rent property is re-let to a new or transferring tenant the rent level be set by reference to 80% of the market rent (including service charges where applicable) for a similar property at the time of letting or the formula rent for the property, whichever is the greater.
- Approve in principle in line with Government's commitment confirmed in January 2026, the re-introduction of Rent Convergence for Bury's HRA stock, which will come into effect from April 2027, with an additional rent charge of £1 per week in

2027-28, and £2 per week from 2028-29 onwards until Rent Convergence is achieved.

- Note that Government has confirmed its commitment to the re-introduction of rent convergence from April 2027, with a proposed additional £1 per week charge from April 2027 and £2 per week from April 2028. Until the changes are finally confirmed the additional income has not been assumed in the revenue plan.
- Note that following the Cabinet decision to wind down and close Six Town Housing (STH), a working group has been set up to oversee this process, led by Management Consultants Campbell-Tickell. This process will take at least 12-18 months, and at this stage it is not possible to state what implications if any there will be for the Council's General Fund and HRA. The options as to what will happen to the remaining assets currently held by STH will be presented to Cabinet at the appropriate time for any decisions to be made.
- To note and approve the revisions made to the HRA 30-Year Business Plan.

Reasons for recommendation(s)

8. Initially to ensure that there is a balanced budget in place for the HRA, covering both revenue and capital requirements for 2026/27. The approval of these budget plans for 2026/27 will mean that Bury Council can continue to provide critical housing services to our current tenants and invest in maintaining and improving their homes. This sits within a core set of key policy principles for the housing service: -

    - Ensure the application of the principles of economy, efficiency and effectiveness.
    - Continue to invest in the existing stock to maintain the Decent Homes Standard.
    - Maintain and develop effective engagement with tenants.
    - Continually monitor the impact of welfare changes such as Universal Credit on tenants and ensure that they have the appropriate support.
    - Work with private landlords to improve their stock where appropriate.
    - Undertake environmental improvements to estates if and when possible, acknowledging the impact that this can have in creating safe and clean estates.
    - Support the delivery of Affordable Homes across the Borough.
    - Undertake direct development, acquisition and refurbishment to bring properties back into use if appropriate and affordable.
    - Create sustainable tenancies and maximise rental income collection.
    - Undertake sustainability measures across the housing stock as appropriate and affordable to help address the Climate Change Emergency.

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Department: Corporate Core Department
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Relevance to the Council and HRA Business Plan.

9. Balancing the HRA, the Capital Investment Plan, and reviewing the 30-year business plan is critical for effective decision-making and aligning resources with the Council's priorities. While the plan currently includes the ambition to deliver affordable homes, the extent of this has been assessed in light of an increasing cost base and business plan sustainability. There is greater financial pressure being experienced by the business plan due to a greater shift towards maintaining the existing stock, ensuring compliance, and meeting higher regulatory standards, while trying to keep the HRA affordable.

10. The vision of the Council's Let's Do It! Strategy set out in 2020 is to be a resilient, inclusive and sustainable borough that empowers local communities through working together. Provision of social and affordable housing and support to tenants leans into all of the key guiding principles of the Council's strategy and informs the development of the business plan. As the Strategy states "it is not just a strategy for service improvement; it is a radical new proposition for community power, putting relationships first and creating a borough in which every single person plays their part." The ambitious vision for Bury is built upon community conversations and is simply put to achieve greater than national average growth, whilst having lower than national average levels of deprivation. Decent quality, affordable social housing is key to achieving these ambitions.

Background and Policy Context

11. The Authority is responsible for managing just over 7,500 properties. Rents and service charges provide most of the resources available to the HRA, which is then used to fund the management and maintenance of the housing stock. This income and expenditure are accounted for in a ring-fenced account as required by law under the Local Government and Housing Act 1989. The authority does not have any discretion to transfer sums between the HRA and the General Fund, except in very limited and prescribed circumstances. Although accounted for separately, the HRA forms an intrinsic part of the Authority's overall vision and Council Plan, and this report sets the context within which the HRA Financial Plan and Budget proposals are set.

12. In April 2012, in accordance with the Localism Act 2011, the HRA (under the Administration of Bury Council) transitioned from a national subsidy system where it had to make an annual payment to Central Government, to become "self-financing". This change allowed the Council to keep all rental income which was then used to cover the costs of managing and maintaining the housing stock, including expenses for repairs, improvements, as well as interest and debt repayments (if and where applicable). As part of the self-financing agreement, the Government received a one-time capital payment of £78.253m from the Council which was funded from borrowing.

13. In April 2022, following Cabinet approval, Springs became a Self-Financing Tenant Management Organisation, the first in the Northwest. Owing to loss of stock through the Right to Buy sales (1), Springs TMO are currently managing 284 properties. Springs Tenant Management Organisation was formed to manage council homes on a self-financing arrangement. This means that the TMO retains the rents collected from the homes and uses this to pay for the management and maintenance of their properties under local arrangements. The value of the rents collected and passed over to Springs TMO is shown as a management fee cost to the HRA (neutral effect on the HRA).

14. To effectively utilise the autonomy of the HRA under the self-financing system, a comprehensive 30-year Business Plan is used. This plan outlines the Council's overarching goals and objectives for the Housing Service, providing a roadmap for addressing both risks and opportunities. This plan should be updated on an annual basis. The 30-year HRA Business Plan has been reviewed as part of the 2026/27 budget setting process. This has been achieved with the help of our Business Plan provider and advisor (Abovo-Consult), and a fully refreshed and improved business plan model has been developed.

15. The updated 30-year HRA Business Plan sets out how the Council will maintain, improve and invest in its services to tenants and housing stock while ensuring the long-term financial sustainability of the HRA. It reflects rising cost pressures, changing regulatory requirements and the revised scale of the development programme, and shows how borrowing, reserves and rental income will be managed to keep the plan affordable over the long-term. A more detailed overview of the Business Plan, its assumptions and financial impact is provided in a separate section below.

16. The HRA continues to face significant risks and uncertainties that could materially impact the business plan. These include inflation and construction cost volatility, interest rate changes beyond the current Public Works Loan Board (PWLB) concessionary rate period, and the potential outcomes from the Government's rent convergence consultation, which are also discussed further later in this report. Further regulatory requirements, such as building safety and tenant standards, are also increasing costs. These risks are amplified by the Council's substantial investment plan, which includes some acquisition and refurbishment plans, as well as major works to existing stock, and a decarbonisation programme. While the ambition remains to deliver new homes, affordability pressures and borrowing requirements mean the scale and timing of any future schemes has had to be re-assessed, and there is currently limited new development that can be afforded within the business plan as it stands.

Updates on Legislation, Government Policy and Consultations affecting the HRA

Rent Convergence

17. A national consultation on Social Rent convergence was carried out by Central Government in 2025, which sought views on how to phase in rent increases for tenancies that were still below their formula rent, on top of the current national policy of CPI + 1%. Rent convergence refers to the process of gradually increasing rents for properties that are currently below the Government's calculated "formula rent" so that, over time, they align with national standard levels. The formula rent is based on factors such as property size, location, and affordability, and is intended to ensure consistency across social housing providers. The outcome of the consultation was finally announced towards the end of January 2026, and will not be implemented until April 2027, with a CPI + 1% + £1 per week increase from April 2027, and a CPI + 1% + £2 per week increase to be implemented from April 2028 onwards until rent convergence is achieved, and all rents are at formula rent. These proposals have been modelled through the revised budget and business plan for the HRA.

Impact: Uplift in rental income assumptions from Aril 2027 onwards, supporting

long-term financial sustainability.
Risk: Increased affordability pressures for tenants not on full benefit support.
Benefit: Strengthens HRA income base, enabling investment in compliance and stock improvement.

Decent Homes Standard (DHS) Reform – Consultation (launched July 2025)

18. Government launched a consultation on a redesigned Decent Homes Standard, proposing clearer criteria, stronger safety rules, higher thermal comfort expectations, and a new mandatory standard for damp and mould. For the first time, the Standard would apply to both Social and private rented homes, aligning with reforms in the Renters' Rights Bill. However, as it stands the new standards would not apply until 2035.

Impact: Likely to increase capital investment requirements for compliance and influence future maintenance programmes. Delivery of this target will be challenging both operationally and financially.
Risk: Significant cost implications for planned works and potential strain on Capital budgets.
Benefit: Improved housing quality and tenant health outcomes and alignment with national standards.

Minimum Energy Efficiency Standards (MEES) – from November 2025

19. New minimum energy efficiency requirements took effect in November 2025, raising expectations for insulation, heating efficiency, and overall building performance. This includes the proposal to formally raise the minimum energy efficiency standard for social housing to EPC band C by 2030. The Council has begun investing in homes to move towards this outcome for some time. Although targeted mainly at new build and funded programmes, these changes set the direction of travel for future national policy, including expected uplifts to EPC requirements for all social housing.

Impact: Reinforces the need for significant investment in energy efficiency works, reflected in the Housing Carbon Reduction Programme.
Risk: Escalating retrofit costs and operational challenges in delivery.
Benefit: Reduced tenant energy costs, progress towards net-zero targets, and long-term asset resilience.

Awaab's Law – October 2025 – Phase 1

20. From October 2025, social landlords must meet new legal response times:

- Emergency hazards to be made safe within 24 hours.
- All significant damp and mould to be inspected and fixed within 10 working days.

21. The next phases of the requirements will be rolled out during 2026/27 and will extend these deadlines to all major Health and Safety Rating System hazard (apart from overcrowding).

At this stage no new funding has been provided to enable the authority to meet the additional burden placed on it because of these changes.

Impact: Requires prioritisation of damp and mould works within the capital Programme and additional compliance monitoring.
Risk: Failure to comply may result in court orders, tenant compensation, or regulatory sanctions, creating financial and reputational exposure.
Benefit: Improved tenant health and safety, reduced risk of litigation, and stronger Regulatory compliance.

Right to Buy (RTB) Reforms – November 2024

22. In the Chancellor's Autumn Budget Statement in November 2024, RTB discounts were reduced to pre-2012 levels and the cost floor extended to 30 years. Under the first of the new rules, discounts still start at 35% of valuations after three years, increasing by 1% per additional year up to a maximum of 70%, but are limited to a regional maximum, which in Bury is £26,000 (previously up to £102,400 nationally). Applications submitted up to 21 November 2024 are still eligible for the higher discount regardless of when the sale completes. This led to a large influx of applications prior to the November 2024 deadline, causing a backlog which is still being worked through now. The costs floor rule means that the discounts cannot reduce the price below the build or refurbishment costs.

23. Further consultation has provided for more changes to be enacted at some stage, which will make further changes to eligibility, exemptions for new build homes and tougher post-sale rules on the use of the receipts. Once legislation is passed, the number of years of required tenancy will increase from 3 to 10 years before an application can be made, discounts at 10 years will start at 5% rising annually by 1% to a maximum of 15% and still be capped at £26,000.

Impact: Expected to significantly reduce RTB sales, lowering receipts but helping maintain rental income levels. This will have a direct impact on future resources for development.
Risk: Short-term surge in applications has impacted stock levels, but longer-term the anticipated reduction in RTB sales means RTB receipts which can be used to fund the development programme are likely to drop dramatically.
Benefit: Longer-term retention of rental income supports HRA sustainability.

Social Housing Regulation – Stronger Consumer Standards

24. Implementation of the Social Housing (Regulation) Act continues, with new Competence and Conduct Standards applying from October 2026. Senior housing managers will need formal qualifications, and landlords must meet strengthened standards on safety, tenant engagement, and transparency, including new Social Tenant Access to Information Requirements (STAIRS) from 2026/27.

Impact: Increased compliance costs and workforce training requirements.

Risk: Additional resource and training costs; risk of regulatory action if standards are not met.
Benefit: Improved governance, tenant engagement, and service quality.

Renters' Rights Bill – Wider Regulatory Alignment

25. As the Bill progresses through parliament, it will end Section 21 evictions, extend the Decent Homes Standard to the private rented sector, and strengthen tenant rights.

- **Impact:** Creates closer regulatory alignment across housing sectors and raises expectations for social landlords.
- **Risk:** Increased scrutiny and potential legal challenges during implementation.
- **Benefit:** Greater consistency in housing standards and improved tenant protections.

National Housing Strategy and 2025 Spending Review

26. Government confirmed a £39bn Social and Affordable Homes Programme over 10 years, alongside national priorities for improving safety, quality and decarbonisation.

- **Impact:** Shapes the broader financial environment for HRAs and influences future capital and revenue planning.
- **Risk:** Funding allocations may not fully offset cost pressures, requiring reprioritisation of investment plans.
- **Benefit:** Opportunity to access grant funding and align local programmes with national priorities.

HRA Capital Programme 2026/27

27. Appendix 1 provides an overview of the proposed capital programme for 2026/27, and for the three years covering the period of the Council's Medium Term Financial Strategy (MTFS). The budget for maintenance of existing homes is higher than in previous years due to a range of factors and is informed by new stock condition data arising from surveys undertaken in 25/26. Some of the new issues included in this budget are discussed below, along with the normal programmes of decent homes component replacement (kitchens, bathrooms, roofs, windows etc).

Planned Refurbishment of Council Stock

28. The planned maintenance programme for the housing stock (kitchen, bathroom, roof, window replacement) continues to be delivered, but recent stock condition surveys have highlighted additional works that have not previously been budgeted for. These include long-standing issues which are symptomatic of an ageing asset base and estates, (for example essential tree works, external paths etc) that cannot be delayed further, alongside inflationary pressures in the repairs sector. Since the last report, the service has undertaken a detailed data-driven review of budget requirements, drawing on findings from the new stock condition survey, which is now nearing completion. This review has identified a substantial volume of capital and revenue works required to maintain compliance and asset integrity. As a result, the planned refurbishment capital programme has increased

considerably for 2026/27 and the period covering the MTFS. Over the next three years a total of £42.036m will be spent on maintaining the existing stock, out of a total Capital spend over the 3-year period of £70.866m.

Housing Energy Efficiency Programme

29. The service is continuing to progress the Housing Energy Efficiency Programme (HEEP), which aims to improve energy efficiency and reduce carbon emissions across the housing stock. Current priorities include measures to move towards achieve EPC Band C compliance across the stock. Planned works include loft insulation, installation of photovoltaic (PV) panels, smart hot water cylinders, and a number of cavity wall insulation projects are planned. A number of these initiatives will help with some of the root causes of a high number of damp and mould cases and will help reduce energy costs for our tenants. The programme continues to support the Council's climate objectives and will contribute to reducing fuel poverty and improving health outcomes for our residents. The programme will see a total of £17.100m spent on various carbon reduction initiatives over the next 3 years.

Potential Household Savings from Energy Efficiency Measures

Energy Efficiency Measure	Estimated Saving
Loft Insulation	5%-10%
Cavity Wall Insulation	10%-15%
Solid Wall Insulation	3%-5%
Floor Insulation	5%-10%
Windows and Doors	1%-5%
LED Lighting	0.50%
*Hot Water	30%
Replacement of storage heaters with high heat retention storage heaters	20%-25%
Solar PV (on suitable properties only)	10%-30%

**Installation of smart hot water cylinders to be used in conjunction with solar divertors attached to solar PV (on suitable properties)*

Awaab's Law

30. Awaab's Law came into effect in October 2025, introducing strict requirements for social landlords to address hazards that pose health risks to tenants. The first phase requires emergency hazards to be made safe within 24 hours and significant damp and mould issues to be inspected and resolved within 10 working days, with remedial works completed promptly. Further phases will follow in October 2026 and 2027, extending these obligations to additional Health and Safety Rating System Hazards, including excess cold, fire safety and structural risks. These requirements have potentially significant implications for the Planned Refurbishment programme, as investment in ventilation, insulation and other remedial works will be essential to ensure compliance. Failure to meet these standards can result in enforcement action, including court orders, compensation claims, and regulatory sanctions. The capital programme must therefore prioritise works that address damp and mould and improve energy efficiency to protect tenant health and avoid financial and reputational risks.

New Build, Acquisition and Refurbishment Programme

31. To date the development programme in the HRA at Bury has been minimal. Development was concentrated in Six Town Housing, and these properties are not owned by the Council directly and are not part of the HRA. They were financed by separate borrowing by STH. Until 2023/24, the Council's HRA had not generated any 1-4-1 RTB receipts from its sales and did not borrow to build (or finance the Capital Programme). From 2023/24 onwards, the Government has allowed HRAs to keep the proportion of the RTB receipts that would have been HM Treasury's share, but these receipts must be used on replacement homes within 5 years of being generated. As a result of receiving these receipts, the development programme includes 12 new build homes that will be acquired from a developer at a cost of £3.18 million. In addition, the developer as part of the land deal agreements is gifting a total of 15 properties to the Council, which will be used to house families on the waiting list.

32. The acquired and gifted properties should all come into stock and become lettable by the end of 2026-27. The plan also includes provision for a project to build 16 new homes on the site of The Elms at an estimated cost of circa £4 million which would come into stock by the end of 2027/28. Funding is assumed to be from RTB receipts, Homes England Grant and commuted sums from S106 developers. Potential provision has also been made over the next two years, to carry out a project to resolve issues around Eton Hill Flats, which have continued to deteriorate and become a blight. Favoured options at this stage involve a major refurbishment of the site, but several options are being looked at.

33. Overall, currently over the next 3 years there is the potential for a total of £10.870m to be spent on new build, acquisition and refurbishment of existing stock to either add to the existing stock or bring empty properties back into use.

Information and Communication Technology

34. It has long been recognised that the various Housing-related IT management systems currently being operated to support the Housing service are in serious need of upgrading, to bring them anywhere close to being fit for purpose. Options for upgrading and enhancing current systems, or potentially ultimately replacing those systems will be brought to Cabinet in due course. However, it should be noted that provision has been made within the current refresh of the HRA Business Plan, in terms of both Capital and Revenue resources to enable systems to be upgraded over the next three years.

Resourcing the Capital Programme

Useable RTB Receipts and Retained (1-4-1) Receipts.

35. The rules governing the distribution and use of RTB capital receipts are complex. However, the Government has introduced changes that provide greater flexibility in the use of 1-4-1 receipts. Since April 2023, councils with HRAs have been allowed to retain RTB receipts in full, removing the previous requirement to return a proportion to Government. Flexibilities introduced in July 2024 (which become permanent from 2026/27 now allow councils to fund up to 100% of development costs using retained receipts, combine 1-4-1

receipts with Section 106 contributions and affordable housing grants, and remove the previous cap on acquisitions (which was limited to 50% of scheme cost).

36. From 2026/27, the Local Authority Share and RTB buyback allowance will also be included within retained receipts and subject to the same restrictions and time limits. This means they will no longer be freely usable for other capital purposes (e.g. General Fund projects) and must be applied exclusively to development within the HRA. In addition, the repayment deadline for unused 1-4-1 receipts will be extended to 10 years for receipts generated from 2027/28 onwards, providing greater certainty for long-term planning. These measures enhance the ability of local authorities to deliver new social and affordable housing and reduce the risk of losing receipts due to delays in construction or planning.

37. However, it should be noted that changes to RTB discount rates as described above, are expected to substantially reduce the number of RTB sales. This in turn will lead to a sharp decline in 1-4-1 receipts, meaning that the development programme would need to rely on alternative funding sources if it is to continue future development.

Grant Income

38. Grant from the Affordable Homes Programme has been approved in principle for the Elms scheme in discussion with Homes England. The authority was also successful in obtaining grant from the Greater Manchester Combined Authority's Social Housing Fund in 2025/26 of £2.300m for various carbon reduction and other energy related works,

39. Other Receipts includes any other HRA (non-schedule) receipts or non HRA receipts available to support capital expenditure, for example from and developer contributions, commuted sums.

40. Major Repairs Reserve the HRA makes a provision by way of a credit to a MRR of an amount in respect of depreciation applied to the stock. This MRR is used to fund capital investment in refurbishment components such as kitchens, roofs etc.

41. Revenue Contribution to Capital Outlay (RCCO) The HRA Business Plan aims to ensure that revenue balances remain at a minimum of £2.000m throughout the life of the plan. Where affordable, Revenue Contributions to Capital Outlay (RCCO) will be made, provided this does not reduce the balance below this threshold. This approach helps minimise borrowing and associated interest costs, while also maximising the interest cover ratio.

42. Borrowing the Council borrowed £78.253m in 2012 in addition to its existing HRA debt, to meet the self-financing settlement with phased maturity dates continuing until 2041/42. The opening balance of the HRA debt in 2025/26 was £119.012m, which includes £14.6m borrowed internally from the General Fund. Most of the HRA loans are Public Works Loan Board (PWLB) fixed maturity loans with interest charged based on each specific loan. Around £6m of loans are classed as market loans from banks / funding institutions.

43. During the 2025/26 financial year, the Council has undertaken a major refinancing exercise of a number of its individual debts, including those affecting the HRA. On the advice of its Treasury Advisers, £42.169m of the HRA proportion of loans has been paid off and refinanced with seven new PWLB loans. These loans are "EIB loans" which means the

Council makes a repayment of the debt every year and interest is reduced. A discount on interest will also be received in relation to the old loans over 10 years.

44. The Business Plan assumes that these loans will be refinanced when they reach maturity and as repayments are due each year. The HRA balances are not sufficient to make repayments every year and finance the latest capital programme. Any shortfalls in capital financing are assumed to be met from Revenue Contributions to Capital Outlay (RCCO), where this is affordable, or from additional borrowing using long term PWLB fixed maturity loans. Any new borrowing has been assumed as having an interest rate of 4.98% rising to 5.18% by April 2027 onwards.

45. When a loan matures, it is assumed that the loan will be refinanced internally with the General Find at 5%, until there are sufficient resources available in the plan to provide for repayment. The balance of debt on the HRA at 1 April 2026 is expected to be £129.624m as a result of the requirement to borrow around £10.715m for the capital programme in 2025/26.

Revenue Budget Estimates for 2026/27

46. Appendix 2 provides an overview of the proposed revenue budget for 2026/27, as well as for the full three years covering the Council's Medium Term Financial Strategy (2026-29).

Key Changes to the Revenue Budget

47. Interest Receivable The budget for interest receivable has been reduced by £0.286m to reflect lower cash balances and a reduction in interest rates. This adjustment ensures that income projections remain realistic given current market conditions.

48. Sheltered Housing Service Charges - Service charges for sheltered housing have been reviewed and for 2026/27 it has been recommended that they are increased in line with the rent increase at 4.8%. However, alongside this it is recognised that there is a need for a fuller of service charges, as some budgets were clearly inaccurate historically. These charges typically cover the upkeep of communal areas and facilities, such as cleaning, grounds maintenance, lighting, and equipment like lifts and door-entry systems. The service has identified that some chargeable items, including communal lighting, gardening and cleaning, are not currently recovered. A full review will be undertaken to look at this, but any changes will not affect tenant charges in 2026/27.

49. Depreciation The budget for depreciation is changing significantly for 2026/27. The Authority has engaged new valuers, and this has led to a review of the principles for calculating the depreciation charges attributable to the Council's assets. This revised approach has seen a significant increase in the value attributed to the HRA's asset base of over £60.000m for 2025/26. This results in an increased depreciation charge to the HRA of just over £1.650m above budget for 2025/26, increasing from the £7.300m budgeted for to over £8.950m. The treatment of Depreciation is markedly different between the General Fund and the HRA, as for the HRA, the charge is a direct charge to the bottom line of the budget and has to be transferred to the Major Repairs Reserve (MRR) to fund the Capital Plan, hence squeezing revenue resources much earlier in the business plan than would otherwise have been the case. It has been assumed that this trend will continue and so the

budget has been increased to £9.137m for 2026/27, which also includes an inflationary element.

50. Revenue Contribution to Capital Outlay (RCCO) The new HRA Business Plan includes an estimated RCCO of £8.000m for 2026/27. These types of contributions are made each year where affordable. Using revenue to support capital investment helps minimise and delay borrowing and associated interest costs, supporting long-term financial sustainability.

51. Interest Payable The interest payable budget has reduced in 2025/26 following the debt restructuring exercise referred to earlier as discounts have been allocated over the first ten years. However, these costs start to rise significantly year on year as the projection from the new HRA Business Plan are applied. This reflects the additional borrowing required to fund the Council's capital programme, including works to maintain and improve the existing stock, supporting essential compliance works, energy efficiency upgrades addressing other issues across the estate, all of which are key priorities in the 30-year Business Plan.

52. EPC and Stock Condition Surveys The importance of constantly updating stock condition survey data and carrying out EPCs where required is noted. As part of the restructure of the housing property services function this was recognised by creating a number of internal surveyor posts, which will provide a constant rolling update of stock condition data across the stock. Both EPC and stock condition surveys are critical for meeting regulatory requirements, supporting decarbonisation plans, and informing long-term investment priorities within the HRA Business Plan.

53. Compensation and Legal Advice The budget recognises the pressures brought about by an increasing blame and claim culture, and so increased provision has been made to cover compensation payments and specialist legal advice. This reflects the need to manage claims and regulatory compliance effectively, with options for developing in-house provision currently under review.

HRA Rent Setting

National Social Rent Policy

54. In accordance with the Government's National Social Rent Policy, which came into effect from 1st April 2020, rents could increase by up to CPI plus 1%, until 1 April 2024. In April 2024, the previous Government confirmed that this policy would be extended for 2025/26, or until 1 April 2026. Following a consultation in November / December 2024 on the future of social rents, the Government confirmed that this policy would be extended for the next 10 years or until 2036/37. This was reconfirmed in the Autumn Budget Statement on 26th November 2025.

55. This policy is also confirmed in the Regulator of Social Housing's (RSH) Rent Standard, which applies to **all** social housing providers.

56. Where a property is or becomes void during 2026/27, social rent properties can be increased to the social formula rent on re-let. The formula for social rent has been provided for all social housing providers since 2001 and is designed to give standardised

rents in England based on location, affordability and the number of bedrooms. Social housing providers are allowed to set the target rent at up to 5% above the formula rent for General Needs properties and up to 10% above for Sheltered properties and be within the Rent Standard.

2026/27 and future rent setting

57. In line with the Government's National Social Rent Policy and the RSH Rent Standard, it is recommended that for 2026/27 all Bury Council rents (social and affordable) will increase by CPI plus 1%. This is a real increase of 4.8% in 2026/27 based on CPI in September 2025 of 3.8%.

58. Affordable rents are set at a maximum of 80% of the market rent for a similar property in the area, including service charges, and capped by the relevant Local Housing Allowance if lower. On a change of tenancy, the rent is recalculated using the same rule, which may result in a decrease if market rents fall. The initial affordable rent figure must always be higher than the social formula rent plus any service charges for that property.

59. Shared Ownership rents are calculated based on the value of equity in the property that the Council holds. This will be different for every property that is partially sold under the scheme. The legal agreement determines the rent increase allowed and these properties are not covered by the Rent Standard. The rent increase for Shared Ownership properties is February RPI + 0.5%. February's rate of RPI will not be known until mid-March 2026. As a guide, December's RPI figure recently announced was 4.1%, which if this remained the same would mean Shared Ownership rents rise by 4.6%.

60. Therefore, the impact of these increases across all existing properties in the housing stock is an average actual increase for 2026/27 of 4.8% for social rented properties – General Needs and Sheltered in total (£4.65 per week on a 50-week basis) and 4.8% for affordable rent properties - General Needs and Sheltered in total (£9.71 including services per week on a 50-week basis).

61. This is only an average actual monetary increase and because rents will be calculated for each individual address, some rents will increase by more than the monetary value based average but conversely some rents will increase by a lower amount. The lowest change is an increase of £1.47 per week and the highest of £6.51 per week, both based on a 50-week basis for social rents. The lowest increase for affordable rents is £5.28 per week and the highest is £11.46 per week.

62. This gives an average social rent in 2026/27 of £101.43 per week and an average affordable rent of £211.87 including services per week.

63. Based on actual stock mid-January 2026, the average rents by type and bedroom size in 2025/26 and 2026/27 based on a 4.8% increase are shown below. There are 50 rent collection weeks in each year:

Social Rents

Analysis Categories:		SR Bedsit	SR One Bed	SR Two Bed	SR Three Bed	SR Four Bed	SR Five Bed
Stock Numbers							
Current	2025.26	156	3,035	2,391	1,843	101	2
Average Actual Rents							
Year	Year						
Current	2025.26	£80.98	£89.44	£98.02	£107.50	£116.24	£131.30
1	2026.27	£84.87	£93.73	£102.72	£112.66	£121.81	£137.60
Average Formula Rents							
Year	Year						
Current	2025.26	£84.30	£95.50	£106.60	£117.90	£127.01	£135.79
1	2026.27	£88.35	£100.08	£111.71	£123.56	£133.11	£142.31

Affordable Rents

Analysis Categories:		AR Two Bed	AR Three Bed
Stock Numbers			
Current	2025.26	57	2
Average Actual Rents			
Year	Year		
Current	2025.26	£217.29	£172.74
1	2026.27	£227.72	£181.03

64. In June 2025, as part of its Spending Review the Government announced a 10-year social housing rent settlement from 2026 at CPI plus 1%, alongside a consultation to follow on how to implement rent convergence. As part of the consultation on the rent settlement, there was clear feedback that the level of investment in new and existing social housing, needed to deliver the Government's ambitions would not be unlocked unless social housing was considered. Convergence would allow rents for social rent properties only that are currently below the 'formula rent' to increase by an additional amount each year, over and above the CPI plus 1% limit, until the rent 'converges' with formula rent. Formula rents refer to the formula that is used to calculate the social rent that may be charged for a given property. A convergence mechanism was originally introduced in 2002 but was abandoned in 2015.

65. The consultation on how to implement Social Rent Convergence ran between July and August 2025 with the Government seeking views on:

I. The rate of convergence; whether weekly rents should be allowed to increase each year by either £1, or £2 over and above the CPI plus 1% limit) until they converge with formula rent.

II. The timing of convergence: whether convergence should be available to Registered Providers of Social Housing for the full period of the rent settlement, or only for part of

it (i.e. by being implemented after 2026 and / or terminated before 2036), and when it should be first implemented from.

66. As part of the Government's Autumn Budget on 26 November 2025, the Government delayed a decision on this policy until January 2026. This implied that convergence is unlikely to be allowed from April 2026 given the timescales that would be needed for approval and implementation. This was confirmed late in January 2026, with the Government announcing that rent convergence would be re-introduced from April 2027. Given the length of time between now and next April it is recommended that we don't make any assumptions around the impact on business plans and budgets, until details are confirmed prior to setting the 2027/28 budget.

Rent Setting 2026/27–Options, Risks and Reasons for Recommendations

67. The Government's Spring Budget of March 2025 has allowed rents to increase by up to CPI + 1% in 2026/27 and agreed to maintain that increase for a minimum of ten years from April 2026. This provides certainty for long-term financial planning and supports the sustainability of the HRA Business Plan, enabling continued investment in compliance works, energy efficiency improvements, and new affordable homes.

68. The Government's budget in October 2024 resulted in increased levels of employer national insurance costs going forwards and also additional costs on contractors that may be passed on. Inflation in the repairs and maintenance industry is running at higher rates than the standard average inflation level. Wage increases for the year on average have risen by 4.1% in the UK. This has resulted in inflation in September 2025 of 3.8% compared to previous estimates of 2.5%.

69. Borrowing costs, even with an extension (to 31 March 2026) of the interest rate cut for PWLB borrowing is still at its highest level for years. Long-term borrowing rates remain at over 6% for PWLB. This means the cost of borrowing to support increased costs of capital works / development aspirations is higher and will continue to be for some period of time. Interest rates are predicted to be higher than rent increases going forwards. Changes in the Right to Buy (RTB) discounts and expected changes in eligibility will drastically reduce the number of sales of social properties. Whilst this maintains the rental income to the HRA, it will mean that there are fewer capital receipts than in previous years to contribute to the cost of maintaining current stock and developing new homes.

70. Whilst the Government have announced that welfare benefits will increase in line with inflation in 2026/27, Government intervention in rent setting (such as in 2023/24) remains a risk to future rental income. Therefore, in order to set a balanced HRA revenue budget it is advisable to increase rents whilst this opportunity is still available. This is to ensure that the Council, as a landlord, is adopting and implementing an appropriate approach that first and foremost manages risk to residents and secondly meets its statutory and regulatory obligations. Many of the new obligations were not part of the 2012 self-financing debt allocation and these together with previous years' rent reductions (2016-2020) or limits (2023/24), have put pressure on HRAs to achieve the expectations of 2012, let alone the current requirements.

71. The HRA business plan does not assume at this stage that rent convergence at CPI + 1% + £1/£2 per week will commence from April 2027. Should the future inflation rate not drop

towards 2% next year, then the opportunity to recover rent lost in previous years, may still not be offered by the government. The majority of the cost of the additional rent will be borne by the government in terms of the benefit bill.

Service User Implications

72. In the Government's Autumn Budget (26 November 2025) it was announced that for 2026/27 tenants in receipt of income related benefits, including Universal Credit and Housing Benefit will see their benefits increase in line with inflation. In addition, the National Minimum Wage will increase by 4.1% to £12.71 per hour from April 2026, which will help mitigate the cost-of-living pressures for working households.

73. Approximately 60% of tenants in Bury receive Housing Benefit or Universal Credit and will therefore fully or partially be mitigated against the impact of the rent increase. For those not in receipt of full benefit support, the increase may represent a greater challenge, particularly for households on partial benefits or low incomes. Over the last 12 months we have seen a sustained level of requests for support from tenants seeking assistance with their housing costs and who may be financially vulnerable.

74. The service has an extensive variety of support options in place to assist these tenants. Our Tenancy Sustainment professionals help tenants to manage their finances and optimise available income, such as access to benefits, benefit reviews, and supporting benefit appeals and backdates. We will utilise sources of government funding such as Discretionary Housing Payments (DHP) and we have successfully bid for Housing Support Fund monies to help with fuel and food poverty amongst vulnerable tenants. Income Officers actively monitor arrears and maintain regular engagement with tenants, ensuring early intervention for those who are facing financial challenge and are a frequent source of referral to our support team to improve financial wellbeing and sustain tenancies.

75. All additional income from increased rents and / or other service charges will support future investment both in the Housing Service and the housing stock. This will fund essential compliance works, energy efficiency improvements, and estate enhancements, delivering long-term benefits for tenants through safer, warmer and more sustainable homes.

HRA 30-Year Business Plan Review

76. The Council uses Fortress HRA Business Planning tools supplied by Abovo-Consult. Each year this is reviewed and updated in line with current legislation and requirements of the stock profile. This model incorporates the latest capital and revenue budget estimates for 2026/27, current economic assumptions, and updates for recent Government policy changes, including Right to Buy reforms. As stated above it also does not at this stage assume rent convergence from April 2027. The new model offers enhanced financial planning functionality and, together with external advisors, provides robust support in what is a challenging period for the social housing sector and providers' business plans.

Key outcomes of the review

77. Peak debt under the latest version of the HRA Business Plan is £447m, compared to £242m in a previous iteration of the plan.

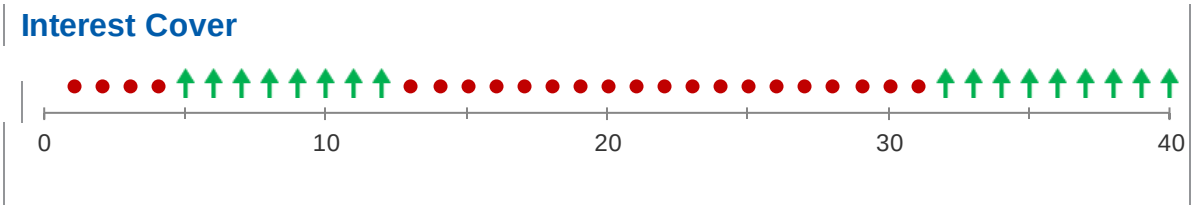
78. The revised development programme now assumes 41 new homes or acquisitions over the next three years, with total capital spend of £10.870, funded by a combination of grants, commuted sums, shared ownership receipts, revenue contributions (RCCO) and borrowing. There is no assumption at this stage of further development beyond the first three years, as resources are increasingly having to be directed towards increased compliance, safety and regulatory risk in relation to the existing stock. With the envisaged reductions in future RTB sales and resulting capital receipts, the options for further development are significantly curtailed unless other resource streams are made available.

79. Unfortunately, the implication of continued low levels of current and future development, is that the plan becomes more and more reliant in the medium to long-term on borrowing to fund essential decent homes delivery, which then leads to higher peak debt (£441m) and weaker interest cover.

80. The table in appendix 3 to this report gives a detailed breakdown of capital spend and financing over the 30-years of he business plan. The table in appendix 4 to this report gives a summary breakdown of revenue expenditure over the total 30-years of the business plan.

81. The model assumes that existing loans are refinanced as they fall due, on long-term loans of 40 years, rather than being repaid early. Because the HRA no longer generates enough spare cash to pay down debt, available balances are instead used within the capital programme to reduce the level of new borrowing. This approach helps to contain debt growth in the early years of the plan. However, during the medium-term years of the plan, without other sources of income or significant reductions in costs, which risks reduced levels of service, and the level of borrowing will become unsustainable.

82. The key parameter of Interest cover ratio is consistently broken across the current version of the 30-year plan and will only improve if more income streams come online, or if costs can be driven down. If rent convergence is implemented from April 2027 there will be some additional income potentially feeding the plan which would help. The visual below highlights the years in which the interest cover target is breached (red dots). It can be seen that there are significant periods of the current plan where interest cover is breached.

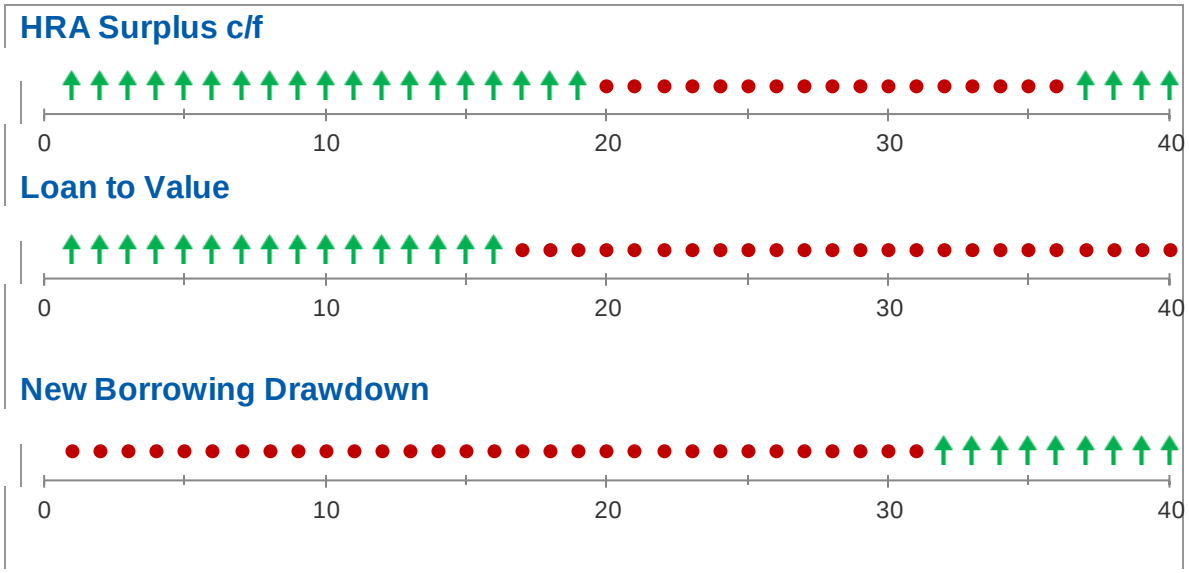


83. Interest cover is a measure of the HRA's ability to pay the interest on its debt. It compares the surplus earnings to the interest costs of borrowing. A higher interest cover means that the HRA is more easily able to meet its interest payments and there is more headroom

to address shocks for example, if income drops or costs increase. A lower interest cover means that the organisation is more likely to struggle to meet its interest costs and lenders and auditors will see this as a risk.

84. The plan assumes refinancing of debt on a long-term 40-year revolver basis when loans mature. Borrowing remains significant, but the use of Revenue Contributions to Capital Outlay (RCCO) in years where affordable, and careful profiling, would help reduce exposure.

85. The visual below shows years when new borrowing is drawn down (red dots). The Plan shows that the HRA relies more and more on borrowing to fund the Capital Plan over the next 30 years. The only ways to start addressing this position is by driving down costs within the plan. An initial savings target of £0.500m per annum for the first 4 years of the plan has been assumed, which would represent a £2.000m reduction in the cost base after 4 years, which would then need to be reviewed again, considering any significant changes in the Treasury Management position for the HRA.



HRA Debt vs. HRA Surplus

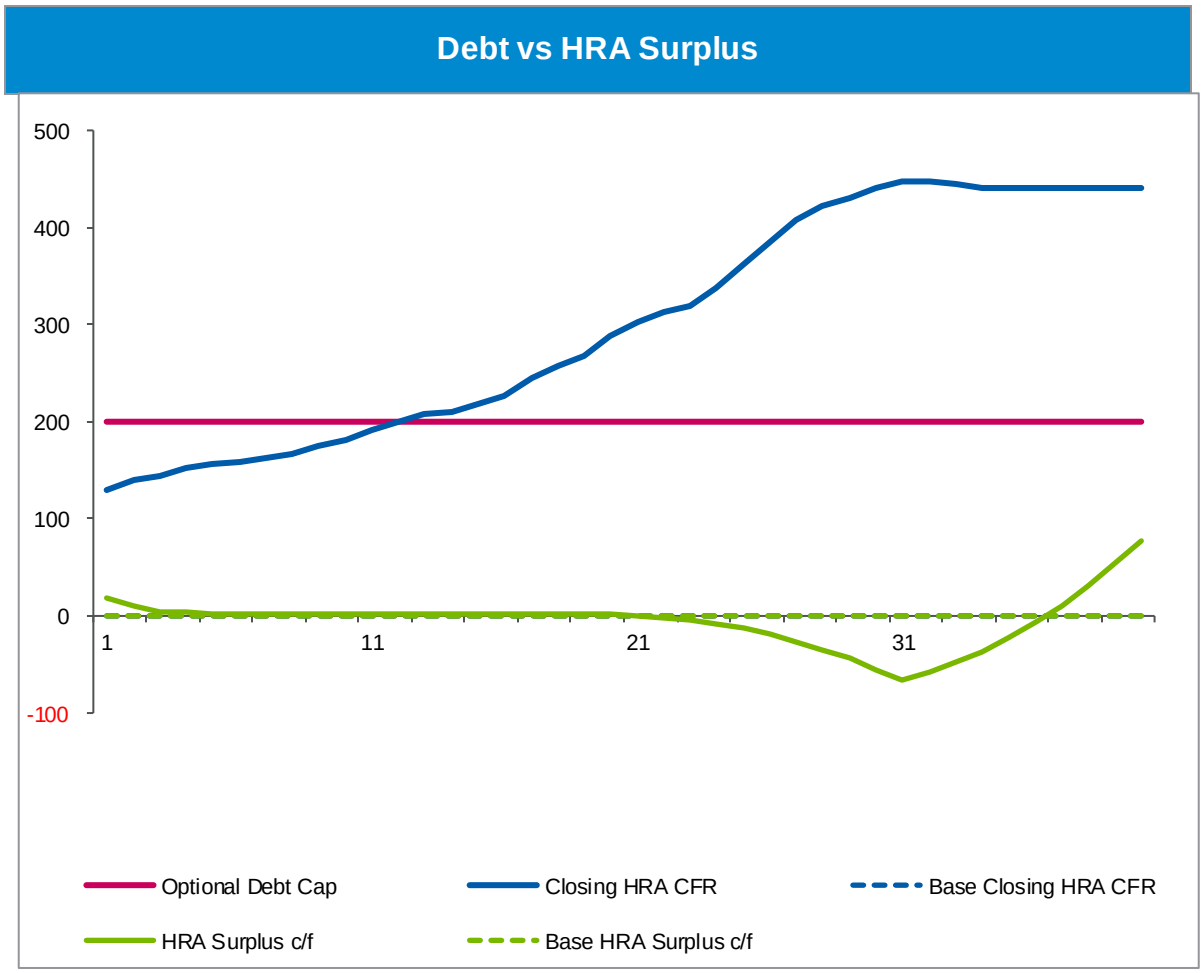
86. The chart below illustrates the relationship between the HRA debt and HRA surplus over the 30-year life of the Business Plan.

87. The Blue line (Closing HRA CFR): This represents the closing Capital Financing Requirement (CFR), which is effectively the level of outstanding debt. The chart shows debt rising significantly throughout the life of the plan as increasing levels of borrowing are required to fund the capital programme, peaking after 30 years at an estimated debt level of £441m at in year 2054/55. This reflects the revised and limited amount of development that is currently affordable in the plan and the assumption that debt is refinanced on a long-term basis rather than any more being repaid early.

88. The Green line (HRA Surplus c/f): This shows the cumulative HRA surplus (cash reserves) over time. The surplus remains very low for most of the plan due to heavy investment in compliance, decarbonisation and development, and effectively the HRA

goes into a negative cash position in year 21, 2045-46, which statutorily the HRA is not allowed to do.

89. The chart demonstrates that the HRA carries high debt throughout the plan, this is partially managed through refinancing rather than early repayment, but as already stated is not currently an adequate solution to keep the 30-year plan in balance. The position will only improve if costs can be driven down, longer-term interest rates start to come down, and other resources can be identified and maximised, such as grant income. But it should be noted that the current picture presents a very challenging set of circumstances for the HRA.



90. The Table below summarises some of the key metrics in the plan:

	Base	Live	Movement
Peak Debt £'000	0	447,408	▲ 447,408
Peak Debt Yr	1	31	
Repay Yr	1	40+	
Net Peak Debt £'000	0	513,484	▲ 513,484
Net Peak Debt Yr	1	31	
Net Repay Yr	1	40+	
Min HRA Surplus c/f	0	-66,076	▼ -66,076
Min HRA Surplus c/f Yr	1	31	

Min Interest Cover	0.00	0.60	▲	0.60
Min Interest Cover Yr	1	31		

91. The table shows that the Business Plan reaches a peak debt position of £441m at the end of the 30-year period in year 2054/55 (up from £242m in a previous iteration of the Business Plan). The opening HRA surplus at April 2026 is projected to be £18.386m. As described above, the minimum interest cover ratio level, 0.60 occurs in year 30 (54/55) of the plan (against a target ratio level of 1.25).

HRA Business Plan next steps

92. In order to improve the long term outlook for the HRA a number of areas will be explored with the aim of reducing costs within the HRA and increasing income including;

- Improving the collection of rent and service charges. Rent arrears are currently very high and improved rent collection would increase the income available to the HRA. Reviewing service charges to ensure they are fair and the tenants and leaseholders pay for the service chargeable services they receive will also increase income into the HRA
- Reviewing all services to ensure they are as efficient and effective as possible to deliver increased efficiency savings and reduce management costs.
- Improving procurement practice and contract management within the service will lead to savings and reduce management costs in the repairs service.
- A full review of the 30 year capital programme to remove any unnecessary expenditure and duplication.
- More strategic procurement of the capital programme to reduce costs and increase efficiencies.
- Carry out an assessment of all housing assets to ensure they remain viable and dispose of those where the costs outweigh the benefits or that cannot be improved to decent homes or EPCC standards.

Rent Setting – Implications of not approving the Rent Increase

<u>Immediate Financial Impact</u>

93. The proposed 4.8% rent increase (CPI + 1%) would generate c.£1.75m additional rental income in 2026/27, based on the same level of stock as in January 2026. Refusal would create a shortfall, within an even shorter period than already outlined in the current 30-year plan, it would still be possible to set a balanced budget for the first few years, but it will be virtually impossible to set a balanced HRA budget long-term, when it would go into deficit about two-thirds of the way through the Business Plan's life. Addressing the deficit will require:

- Efficiencies in service delivery including potential service reduction
- Improvements in rent and income collection
- Potential reductions in the capital programme including more effective procurement

- Additional borrowing, which would lead to higher interest costs and long-term financial pressure.

Impact on the HRA Business Plan

94. The plan assumes CPI + 1% rent increases for the next decade. Removing the 2026/27 increase will:

- Reduce projected income across the life of the plan.
- Compromise funding for compliance works, energy efficiency upgrades (initial target of EPC Band C by 2030),
- Increase reliance on borrowing, which is already forecast to grow from £130m to as much as £441m over the next 30 years.

Impact on the Capital Programme

95. The 2026/27 capital programme totals £31.261m, including:
    - £3.120m for new Council homes.
    - £26.731mm for necessary planned refurbishment of existing stock.

96. Without the rent increase, likely consequences include:
    - Deferral of essential works, risking (but not restricted to) non-compliance with Awaab's Law and Decent Homes Standard.
    - Slower progress on decarbonisation targets (e.g. target of EPC Band C by 2030).
    - Increased regulatory and reputational risks.

Regulatory and Legal Risks

97. Reduced income will hinder meeting obligations under:
    - Awaab's Law (damp and mould remediation within strict timeframes).
    - Decent Homes Standard Revisions.
    - Energy efficiency requirements.

98. Failure to maintain compliance could trigger intervention by the Regulator of Social Housing.

Impact on Tenants

99. Bury Council manages approximately 7,500 properties, with over 60% of tenants receiving Housing Benefit or Universal Credit, indicating high vulnerability. While refusal avoids an average increase of £4.65 per week for social rents and £9.71 for affordable rents, it limits the ability to fund:

- Compliance works (damp and mould remediation).
- Energy efficiency upgrades to reduce fuel poverty.
- Estate improvements and safety works.
- Tenant Support services

100. Delays in these programmes disproportionately affects vulnerable tenants, who are more likely to experience poor housing conditions and health risks. Reductions in tenancy sustainment and hardship support could lead to increased arrears, tenancy failures, and homelessness.

Strategic Consequences

101. Refusal to implement the rent increase would undermine the Council's ability to deliver Bury's Let's Do It! Council Plan priorities (resilient, inclusive, sustainable communities). Long-term viability of the HRA would be further compromised, forcing a review of development ambitions and compliance programmes.

Safeguarding Implications

102. The HRA has an ongoing responsibility for the safeguarding of vulnerable people within its communities. There are no changes to current levels of support provided proposed within this report.

Public Health Implications

103. The links between adequate housing and health is well documented. The provision of social housing targets the most vulnerable people in society, who often face health challenges due to their circumstances. Secure, good-quality housing has a substantial positive impact on the quality of people's lives.

104. The recommendations in this report are considered to have positive public health implications by the management of a sustainable social housing service that incorporates investment in existing homes and the delivery of new homes. In addition to this, the report addresses critical health-related issues such as compliance with Awaab's Law, which requires timely action to tackle damp and mould hazards, and the implementation of measures to move towards meeting the target of achieving EPC Band C standards by 2030, improving thermal efficiency and reducing fuel poverty. These actions will help prevent respiratory illnesses, reduce excess winter deaths, and support overall wellbeing of tenants.

Equalities Impact of the Proposal

105. The council's budget planning framework is supported by the development of Equality Impact Assessments (EIAs) for the budget proposals, identifying possible disproportionate impact in relation to the protected characteristics as described within the Equality Act 2010. The EIAs also identify potential mitigation where applicable.

106. The provision of social housing is by its nature supportive of the most vulnerable people in society in particular with regard to economic status and age. The key proposal within the report that will have the most significant impact on residents is the rent increase. As set out in the report full consideration has been given to the financial circumstances of our tenants in relation to income and the cost-of-living pressures. Consequently, the service provides a wide range of support and assistance for our tenants in times of hardship as described in the report.

107. The increase to rent and services charges will be applied across the housing stock. The outcome of our EIA is that the increase in rent will have a neutral effect on protected groups.

108. To help support tenants on low incomes the housing service will continue to provide a number of initiatives to enable them to manage their finances and maximise their income:

- Publish clear information on rent which helps tenants to manage their own finances;
- Signpost tenants to a relevant benefit agency to help ensure they are maximising their income to meet their living costs;
- Take action to raise the awareness of accessing a range of welfare benefits; and
- Provide the opportunity to access direct, in-house, support in checking they are in receipt of the welfare benefits they are entitled to claim.

Environmental and Climate Change Considerations

109. As part of the Major Works capital programme, the HRA will be looking to replace components in a thermally efficient way where possible, for example installing air source heat pumps, external wall insulation and thermally efficient windows. However, these ambitions must be balanced against longer-term financial pressures on the HRA Business Plan. The scale of investment required for decarbonisation and compliance adds significant cost pressures, alongside the need to manage overall debt.

Legal Implications:

Housing Revenue Account and Rents - The Local Government & Housing Act 1989 Part VI sets a statutory regime for housing finance. The Council must formulate proposals in respect of HRA income and expenditure for the financial year which on the best assumptions and estimates that the Council is able to make at the time to ensure that the HRA does not show a debit balance.

The Council is required to keep the HRA in accordance with proper practice. The Council has a general duty to review the rents of its houses from time to time and in fixing rents the Council must have regard, in particular, to the principle that the rents of dwellings of any class or description should bear broadly the same proportion to private sector market rents as the rents of dwellings of any other class or description.

The review of the rents is a Cabinet function and is undertaken with regard to the provisions of Part VI of the 1989 Act which governs housing finance and housing subsidy. Rents for council houses are a credit to the HRA and outgoings a debit. The HRA continues to be a ring-fenced account, this means that it must, in general, balance on a year-to-year basis, so that the costs of running the Housing Service, which include debt charges, administration costs and maintenance expenditure must be met from HRA income. The Council has the responsibility to determine a strategy that is designed to ensure that the HRA is balanced.

Financial Implications: Section 151 Officer Commentary

110. The HRA budget proposed for 2026/27 is balanced, however, the current 30-year HRA Business Plan is not balanced and is currently estimated to go into deficit in 2046/47. The Interest Cover ratio compares the net cost of services to the interest payable. Ideally this would exceed 1.00 and be closer to 1.25. Unfortunately, this is not achieved in most years of the plan, as greater reliance is placed on borrowing to fund the required level of capital investment. Due to the significant pressures on the HRA (in line with pressures affecting all HRAs nationally), a radical approach is needed from the start of the plan to try and drive down the cost base, whilst maintaining as efficient and effective a service as possible.

111. The recommendation that all Bury Council rents (social and affordable) will increase by 4.8% - based on the current stock of 7,600 properties for 2026/27 as per the HRA Business Plan - will result in an additional £1.75m of rental income (before void loss and bad debt) in 2026/27 compared to 2025/26.

112. At the time of the Government's consultation on future national social rent policy they set out that it will expect the following areas for expenditure to be covered by allowing rents to increase:

- Additional new housing to address homelessness.
- Meeting the requirements of the new proposed Decent Homes Standard
- Meeting the requirements of Awaab's Law, in respect of investigations and remedies to address damp and mould and other hazards to set timescales.
- Meeting the requirements of carbon reduction to set timescales.

113. This report has highlighted that these expectations are not currently realistic within the forecast resource envelope and therefore efficiencies and cost reductions will need to be identified as outlined within the report.

Appendices

Appendix	Description
1	Capital Budget 2026/27 – 2028/29
2	Revenue Budget 2026/27 – 2028/29
3	HRA 30-Year Business Plan – Breakdown of Capital Expenditure Capital Financing
4	HRA 30-Year Business Plan – Operating Account Summary

Background Papers used in preparation of this report

National Social Rent Policy 2019/20 to 2023/24
The RSH (Homes England) Rent Standard
Bury Council Plan 2020-30
HRA Business Plan Model -

Appendix 1

Proposed HRA Capital Investment Plan 2026-29-29 Programme Title	2025-26 FORECAST OUTTURN	2026-27 BUDGET	2027-28 BUDGET	2028-29 BUDGET	TOTAL 2026-29
	£000	£000	£000	£000	£000
HRA Schemes	**25,000**	**31,261**	**23,056**	**16,549**	**70,866**
Made up of:					
Disabled Adaptations	1,892	1,200	1,200	1,200	**3,600**
Externals - Windows & Doors, re-pointing, Lintels etc (Re-programming and Re-provision)	954	1,885	0	0	**1,885**
Externals - Roofing etc - (Re-programming and Re-provision)	4,394	595	0	0	**595**
Internals - Kitchens & Bathrooms, Heating etc (Re-Programming & Re-provision)	1,291	1,395	0	0	**1,395**
Garage Colonies (Re-programming & Re-provision)	103	2	0	0	**2**
Communal Areas (Re-Programming, Re-provision & New Provision)	1,523	974	73	200	**1,247**
Garage Sites	0	100	100	100	**300**
Major Refurbishment Works - Sheltered Estate	0	2,000	2,000	2,000	**6,000**
Major Refurbishment Works - Bathrooms, WCS, Showers etc	0	775	40	924	**1,739**
Major Refurbishment Works - Kitchen & Kitchen Extraction	0	2,799	317	59	**3,175**
Major Refurbishment Works - Heating and Hot Water	0	2,015	223	33	**2,271**
Major Refurbishment Works - Cladding,External Decoration, Lintels,Porches etc	0	353	1,000	1,000	**2,353**
Major Refurbishment Works - Doors,Front Door, Rear Doors, Flat Entrance Doors	0	364	39	272	**675**
Major Refurbishment Works - Windows	0	969	100	224	**1,293**
Major Refurbishment Works - Roofing, including rainwater goods,soffitts,loft insulation etc	0	420	79	152	**651**
Carbon Reduction Schemes - Sustainability Improvement Measures	9,338	5,600	6,000	5,500	**17,100**
Compliance Measures:-					
Asbestos Removal	30	250	250	250	**750**
Fire Risk Assessment (FRA) Type 3 Remediation Works	1,263	1,500	1,000	1,000	**3,500**
Boiler Replacements	140	140	140	140	**420**
Ad Hoc Renewals raised by Compliance Team	1,005	800	800	800	**2,400**
Capital Works delivered by Responsive Repairs Team:-					
Ad Hoc Renewals raised by Repairs Team	374	600	600	600	**1,800**
Drainage & Guttering	0	200	200	200	**600**
Stairlift Renewals	0	20	20	20	**60**
Structural Works - Various Properties	475	300	300	300	**900**
Asset Management Team Measures:-					
Advanced Design (Planning & Delivery)	100	125	125	125	**375**
Miscellaneous Renewals raised by Asset Management Team (AMT)	500	250	250	250	**750**

Stock Condition Surveys	200	0	0	0	**0**
Capitalised Salaries	858	1,100	1,100	1,100	**3,300**
Other Capital Elements:-					
IT Strategy - Housing Systems Upgrade/Enhancement/Replacement	0	660	100	100	**860**
Development:-					
New Build (The Elms)	0	500	3,500	0	**4,000**
Acquisitions (School Street/Seedfield)	560	2,620	0	0	**2,620**
Refurbishment - bringing properties back into use (Eton Hill Flats & Bronte Ave)	0	750	3,500	0	**4,250**
TOTAL: HRA INVESTMENT PLAN 2026-29	**£25,000**	**£31,261**	**£23,056**	**£16,549**	**£70,866**
FINANCING:-					
RTB Capital Receipts - Retained	560	3,120	1,260	0	**4,380**
Commuted Sums (S106)	0	0	800		**800**
RTB Capital Receipts - Other	2,407	0	0	0	**0**
Revenue Contributions	0	8,500	5,250	0	**13,750**
Grant Income	2,330	0	1,440	0	**1,440**
Depreciation/Major Repairs Reserve	8,988	9,167	9,442	9,725	**28,334**
Borrowing	10,715	10,474	4,864	6,824	**22,162**
TOTAL:FINANCING	**£25,000**	**£31,261**	**£23,056**	**£16,549**	**£70,866**

Appendix 2

HOUSING REVENUE ACCOUNT(HRA) - HRA BUSINESS PLAN 2026-29	2025/26 Forecast Outturn	2026/27 Draft Budget	2027/28 Draft Budget	2028/29 Draft Budget
	£m	£m	£m	£m
INCOME				
Rental Income - Dwellings	(37.103)	(38.633)	(40.516)	(42.347)
Convergence Impact	0.000	0.000	0.000	0.000
Charges for Services and Facilities	(1.067)	(1.126)	(1.160)	(1.194)
Non-Dwelling Rents	(0.181)	(0.219)	(0.219)	(0.219)
Interest and Investment Income	(0.810)	(0.664)	(0.434)	(0.395)
Contributions Towards Expenditure	(0.005)	(0.005)	(0.005)	(0.005)
Contribution from Balances	0.000	(9.081)	(5.517)	0.000
Total Income	**(39.166)**	**(49.728)**	**(47.850)**	**(44.160)**
EXPENDITURE				
Supervision and Management	12.271	12.665	12.811	12.963
Special Services	1.660	1.333	1.359	1.387
Repairs and Maintenance	9.157	11.409	11.412	11.426
Revenue Support to Strategic Investment	0.000	8.500	5.250	0.000
Depreciation/Major Repairs Reserve(MRR)	8.988	9.167	9.442	9.725
Debt Interest and Debt Management Expenses	4.179	5.293	5.875	6.153
Debt Repayment / Debt Set Aside	0.105	0.000	0.000	0.000
Bad Debt Provision	0.567	0.565	0.593	0.619
HRA Share of Corporate and Democratic Core Costs	0.400	0.418	0.426	0.435
Empty Homes Council Tax Costs	0.200	0.200	0.200	0.200
Impact of RTB changes on Allowable Debt	0.000	0.178	0.481	0.482
Contribution to Balances	1.639	0.000	0.000	0.770
Total Expenditure	**39.166**	**49.728**	**47.850**	**44.160**
Net Expenditure	**0.00**	**(0.000)**	**(0.000)**	**0.00**
HRA Reserves				
Balances Brought Forward	**(16.747)**	**(18.386)**	**(9.305)**	**(3.788)**
In-Year	**(1.639)**	**9.081**	**5.517**	**(0.770)**
Balances Carried Forward	**(18.386)**	**(9.305)**	**(3.788)**	**(4.558)**

HRA 30 Year Business Plan – Breakdown of Capital Expenditure

Appendix 3

Year		Capital Expenditure						Financing									
Year	Year	Major Works & Imps	Other Capital Spend	New Build Development Costs	Demolition Costs	Other Fixed Assets	Total Capital Expenditure	External Grant	Homes England Grant	RTB 141 Receipts	Arranged Borrowing	Other RTB Receipts	Other Capital Receipts	MRR	RCCO	Revolver Borrowing	Total Financing
		£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
1	2025/26	24,438	0	560	0	0	**24,998**	0	0	560	0	2,405	2,330	8,988	0	10,715	**24,998**
2	2026/27	27,230	660	3,120	250	0	**31,261**	0	0	3,120	0	0	0	9,167	8,500	10,473	**31,261**
3	2027/28	19,455	100	3,500	0	0	**23,055**	800	1,440	1,260	0	0	0	9,442	5,250	4,863	**23,055**
4	2028/29	16,448	100	0	0	0	**16,548**	0	0	0	0	0	0	9,725	0	6,823	**16,548**
5	2029/30	18,054	51	0	0	0	**18,105**	0	0	0	0	0	0	10,017	3,963	4,125	**18,105**
6	2030/31	16,772	52	0	0	0	**16,824**	0	0	0	0	0	0	10,318	2,909	3,598	**16,824**
7	2031/32	16,111	53	0	0	0	**16,164**	0	0	0	0	0	0	10,627	2,526	3,011	**16,164**
8	2032/33	18,331	54	0	0	0	**18,386**	0	0	0	0	0	0	10,946	2,529	4,910	**18,386**
9	2033/34	20,869	55	0	0	0	**20,924**	0	0	0	0	0	0	11,274	2,819	6,831	**20,924**
10	2034/35	21,289	56	0	0	0	**21,345**	0	0	0	0	0	0	11,612	2,967	6,766	**21,345**
11	2035/36	26,832	57	0	0	0	**26,890**	0	0	0	0	0	0	11,961	4,131	10,798	**26,890**
12	2036/37	23,712	59	0	0	0	**23,771**	0	0	0	0	0	0	12,320	2,648	8,803	**23,771**
13	2037/38	21,228	60	0	0	0	**21,288**	0	0	0	0	0	0	12,689	1,857	6,742	**21,288**
14	2038/39	18,132	61	0	0	0	**18,193**	0	0	0	0	0	0	13,070	1,590	3,533	**18,193**
15	2039/40	22,023	62	0	0	0	**22,085**	0	0	0	0	0	0	13,462	1,461	7,162	**22,085**
16	2040/41	22,986	63	0	0	0	**23,050**	0	0	0	0	0	0	13,866	1,135	8,049	**23,050**
17	2041/42	34,528	65	0	0	0	**34,593**	0	0	0	0	0	0	14,282	1,903	18,408	**34,593**
18	2042/43	27,951	66	0	0	0	**28,017**	0	0	0	0	0	0	14,710	331	12,975	**28,017**
19	2043/44	24,797	67	0	0	0	**24,864**	0	0	0	0	0	0	15,152	0	9,712	**24,864**
20	2044/45	36,429	69	0	0	0	**36,497**	0	0	0	0	0	0	15,606	0	20,891	**36,497**
21	2045/46	31,623	70	0	0	0	**31,693**	0	0	0	0	0	0	16,074	0	15,618	**31,693**
22	2046/47	26,172	71	0	0	0	**26,244**	0	0	0	0	0	0	16,557	0	9,687	**26,244**
23	2047/48	23,605	73	0	0	0	**23,677**	0	0	0	0	0	0	17,053	0	6,624	**23,677**
24	2048/49	34,860	74	0	0	0	**34,934**	0	0	0	0	0	0	17,565	0	17,369	**34,934**
25	2049/50	43,109	76	0	0	0	**43,184**	0	0	0	0	0	0	18,092	0	25,093	**43,184**
26	2050/51	40,941	77	0	0	0	**41,019**	0	0	0	0	0	0	18,635	0	22,384	**41,019**
27	2051/52	41,166	79	0	0	0	**41,245**	0	0	0	0	0	0	19,194	0	22,051	**41,245**
28	2052/53	34,641	80	0	0	0	**34,722**	0	0	0	0	0	0	19,769	0	14,952	**34,722**
29	2053/54	29,181	82	0	0	0	**29,263**	0	0	0	0	0	0	20,363	0	8,900	**29,263**
30	2054/55	31,374	84	0	0	0	**31,458**	0	0	0	0	0	0	20,973	0	10,484	**31,458**
31	2055/56	27,664	85	0	0	0	**27,750**	0	0	0	0	0	0	21,603	0	6,147	**27,750**
32	2056/57	0	87	0	0	0	**87**	0	0	0	0	0	0	87	0	0	**87**
33	2057/58	0	89	0	0	0	**89**	0	0	0	0	0	0	89	0	0	**89**
34	2058/59	0	91	0	0	0	**91**	0	0	0	0	0	0	91	0	0	**91**
35	2059/60	0	92	0	0	0	**92**	0	0	0	0	0	0	92	0	0	**92**
36	2060/61	0	94	0	0	0	**94**	0	0	0	0	0	0	94	0	0	**94**
37	2061/62	0	96	0	0	0	**96**	0	0	0	0	0	0	96	0	0	**96**
38	2062/63	0	98	0	0	0	**98**	0	0	0	0	0	0	98	0	0	**98**
39	2063/64	0	100	0	0	0	**100**	0	0	0	0	0	0	100	0	0	**100**
40	2064/65	0	102	0	0	0	**102**	0	0	0	0	0	0	102	0	0	**102**

HRA 30-Year Business Plan – Operating Account Summary

Appendix 4

Year	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Year	2025/26 £'000	2026/27 £'000	2027/28 £'000	2028/29 £'000	2029/30 £'000	2030/31 £'000	2031/32 £'000	2032/33 £'000	2033/34 £'000	2034/35 £'000	2035/36 £'000	2036/37 £'000	2037/38 £'000	2038/39 £'000	2039/40 £'000
Rental Income	37,349	39,022	40,925	42,774	44,471	47,122	47,965	49,715	51,355	52,928	55,572	55,495	56,527	57,577	58,647
Service Charge Income	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Void Losses	(379)	(390)	(409)	(427)	(444)	(471)	(479)	(497)	(513)	(529)	(555)	(554)	(565)	(575)	(586)
Non-Dwelling Rents	181	219	219	219	219	219	219	219	219	219	219	219	219	219	219
Charges For Services	1,067	1,126	1,160	1,194	1,230	1,267	1,305	1,344	1,385	1,426	1,469	1,513	1,558	1,605	1,653
Cont Towards Exp	7	5	5	5	5	5	5	5	5	5	5	5	5	5	5
SP Grant	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other Income	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Income	**38,225**	**39,983**	**41,900**	**43,766**	**45,482**	**48,143**	**49,015**	**50,787**	**52,450**	**54,050**	**56,711**	**56,678**	**57,745**	**58,832**	**59,939**
S&M - General	(12,140)	(12,665)	(12,811)	(12,963)	(13,114)	(13,441)	(13,710)	(14,017)	(14,325)	(14,631)	(14,980)	(15,241)	(15,545)	(15,856)	(16,174)
S&M - Special	(1,660)	(1,333)	(1,359)	(1,387)	(1,414)	(1,443)	(1,472)	(1,501)	(1,531)	(1,562)	(1,593)	(1,625)	(1,657)	(1,690)	(1,724)
Other Charges	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)
Responsive & Cyclical	(9,157)	(11,409)	(11,412)	(11,426)	(11,450)	(11,793)	(12,147)	(12,512)	(12,887)	(13,273)	(13,539)	(13,810)	(14,086)	(14,368)	(14,655)
Depreciation	(8,988)	(9,167)	(9,442)	(9,725)	(10,017)	(10,318)	(10,627)	(10,946)	(11,274)	(11,612)	(11,961)	(12,320)	(12,689)	(13,070)	(13,462)
Debt Mgmt Expenses	(45)	(45)	(45)	(45)	(45)	(45)	(45)	(45)	(45)	(45)	(45)	(45)	(45)	(45)	(45)
Bad Debts	(567)	(565)	(593)	(619)	(644)	(682)	(694)	(720)	(743)	(766)	(804)	(803)	(818)	(833)	(849)
Total Expenditure	**(32,758)**	**(35,384)**	**(35,863)**	**(36,365)**	**(36,884)**	**(37,922)**	**(38,896)**	**(39,940)**	**(41,005)**	**(42,089)**	**(43,122)**	**(44,043)**	**(45,041)**	**(46,063)**	**(47,108)**
Net Cost of Services I&E	**5,467**	**4,598**	**6,037**	**7,400**	**8,598**	**10,221**	**10,120**	**10,847**	**11,445**	**11,961**	**13,589**	**12,635**	**12,704**	**12,769**	**12,831**
Corp & Demo Core	(400)	(418)	(426)	(435)	(444)	(453)	(462)	(471)	(480)	(490)	(500)	(510)	(520)	(530)	(541)
Continuing Operations (not service specific)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Net Cost of HRA Services	**5,067**	**4,180**	**5,611**	**6,965**	**8,154**	**9,769**	**9,658**	**10,376**	**10,965**	**11,471**	**13,089**	**12,126**	**12,184**	**12,239**	**12,290**
Interest Received	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Interest Charges	(4,134)	(5,248)	(5,830)	(6,108)	(6,510)	(6,769)	(7,017)	(7,707)	(8,028)	(8,450)	(8,970)	(9,557)	(10,475)	(10,838)	(11,030)
G/L on Sale of HRA Non-Current Assets	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Surplus / (Deficit) in Year on HRA Services	**933**	**(1,068)**	**(220)**	**857**	**1,644**	**3,000**	**2,641**	**2,669**	**2,938**	**3,021**	**4,119**	**2,569**	**1,709**	**1,401**	**1,260**
Provision for Debt Repayment	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Repayment of Arranged Loans	(104)	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Repayment of Revolver	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Transfer to MRR	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Transfer from / (to) Other Revenue Reserve	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Transfer to Other RTB Receipts Reserve	0	(177)	(481)	(482)	(483)	(484)	(485)	(485)	(486)	(486)	(487)	(487)	(487)	(488)	(488)
RCCO	(0)	(8,500)	(5,250)	(0)	(3,963)	(2,909)	(2,526)	(2,529)	(2,819)	(2,967)	(4,131)	(2,648)	(1,857)	(1,590)	(1,461)
Surplus / (Deficit) for the Year	**829**	**(9,745)**	**(5,951)**	**375**	**(2,802)**	**(393)**	**(370)**	**(346)**	**(368)**	**(432)**	**(499)**	**(566)**	**(635)**	**(676)**	**(689)**
HRA Surplus / (Deficit) b/f	**16,747**	**18,386**	**9,305**	**3,788**	**4,558**	**2,185**	**2,197**	**2,210**	**2,269**	**2,372**	**2,477**	**2,584**	**2,693**	**2,775**	**2,830**
Major Repairs Reserve Interest	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other Capital Receipts Reserve Interest	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Debt Repayment Provision Interest	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
RTB Receipts for Repl Homes Interest	209	222	221	258	318	333	309	331	394	459	525	593	632	644	655
Other RTB Receipts Interest	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Revenue Reserve Interest	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Operating Account Interest	601	442	214	137	110	72	73	74	76	78	80	83	85	87	89
HRA Surplus / (Deficit) c/f	**18,386**	**9,305**	**3,788**	**4,558**	**2,185**	**2,197**	**2,210**	**2,269**	**2,372**	**2,477**	**2,584**	**2,693**	**2,775**	**2,830**	**2,885**

Year	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
Year	2040/41	2041/42	2042/43	2043/44	2044/45	2045/46	2046/47	2047/48	2048/49	2049/50	2050/51	2051/52	2052/53	2053/54	2054/55
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
Rental Income	59,737	62,064	62,021	63,262	64,528	65,819	67,136	69,849	69,850	71,248	72,674	74,128	77,124	77,125	78,669
Service Charge Income	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Void Losses	(597)	(620)	(619)	(632)	(644)	(657)	(670)	(697)	(697)	(711)	(726)	(740)	(770)	(770)	(785)
Non-Dwelling Rents	219	219	219	219	219	219	219	219	219	219	219	219	219	219	219
Charges For Services	1,703	1,754	1,807	1,861	1,917	1,974	2,033	2,094	2,157	2,222	2,289	2,357	2,428	2,501	2,576
Total Income	**61,067**	**63,422**	**63,432**	**64,715**	**66,024**	**67,360**	**68,723**	**71,471**	**71,534**	**72,983**	**74,461**	**75,970**	**79,006**	**79,080**	**80,683**
S&M - General	(16,497)	(16,870)	(17,164)	(17,507)	(17,857)	(18,214)	(18,579)	(18,998)	(19,329)	(19,716)	(20,110)	(20,513)	(20,976)	(21,342)	(21,768)
S&M - Special	(1,759)	(1,794)	(1,830)	(1,866)	(1,904)	(1,942)	(1,981)	(2,020)	(2,061)	(2,102)	(2,144)	(2,187)	(2,230)	(2,275)	(2,320)
Other Charges	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)
Responsive & Cyclical	(14,948)	(15,247)	(15,552)	(15,863)	(16,180)	(16,504)	(16,834)	(17,171)	(17,514)	(17,864)	(18,222)	(18,586)	(18,958)	(19,337)	(19,724)
Depreciation	(13,866)	(14,282)	(14,710)	(15,152)	(15,606)	(16,074)	(16,557)	(17,053)	(17,565)	(18,092)	(18,635)	(19,194)	(19,769)	(20,363)	(20,973)
Debt Mgmt Expenses	(45)	(45)	(45)	(45)	(45)	(45)	(45)	(45)	(45)	(45)	(45)	(45)	(45)	(45)	(45)
Bad Debts	(864)	(898)	(897)	(915)	(934)	(952)	(971)	(1,011)	(1,011)	(1,031)	(1,051)	(1,073)	(1,116)	(1,116)	(1,138)
Total Expenditure	**(48,179)**	**(49,336)**	**(50,398)**	**(51,548)**	**(52,726)**	**(53,932)**	**(55,166)**	**(56,498)**	**(57,725)**	**(59,050)**	**(60,407)**	**(61,797)**	**(63,295)**	**(64,677)**	**(66,169)**
Net Cost of Services I&E	**12,888**	**14,086**	**13,034**	**13,167**	**13,298**	**13,428**	**13,557**	**14,972**	**13,810**	**13,933**	**14,054**	**14,173**	**15,712**	**14,403**	**14,514**
Corp & Demo Core	(552)	(563)	(574)	(585)	(597)	(609)	(621)	(634)	(646)	(659)	(672)	(686)	(700)	(714)	(728)
Continuing Operations (not service specific)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Net Cost of HRA Services	**12,337**	**13,524**	**12,460**	**12,581**	**12,701**	**12,819**	**12,936**	**14,339**	**13,163**	**13,274**	**13,382**	**13,487**	**15,012**	**13,690**	**13,786**
Interest Received	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Interest Charges	(11,415)	(11,848)	(12,831)	(13,522)	(14,038)	(15,149)	(15,980)	(16,495)	(16,847)	(17,770)	(19,104)	(20,294)	(21,466)	(22,261)	(22,734)
G/L on Sale of HRA Non-Current Assets	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Surplus / (Deficit) in Year on HRA Services	**921**	**1,676**	**(371)**	**(941)**	**(1,337)**	**(2,330)**	**(3,044)**	**(2,156)**	**(3,683)**	**(4,496)**	**(5,722)**	**(6,807)**	**(6,454)**	**(8,571)**	**(8,948)**
Provision for Debt Repayment	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Repayment of Arranged Loans	0	0	0	0	0	0	0	(0)	(0)	(0)	0	0	0	0	0
Repayment of Revolver	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Transfer to MRR	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Transfer from / (to) Other Revenue Reserve	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Transfer to Other RTB Receipts Reserve	(488)	(487)	0	0	0	0	0	0	0	0	0	0	0	0	0
RCCO	(1,135)	(1,903)	(331)	0	0	0	0	0	0	0	0	0	0	0	0
Surplus / (Deficit) for the Year	**(701)**	**(714)**	**(702)**	**(941)**	**(1,337)**	**(2,330)**	**(3,044)**	**(2,156)**	**(3,683)**	**(4,496)**	**(5,722)**	**(6,807)**	**(6,454)**	**(8,571)**	**(8,948)**
HRA Surplus / (Deficit) b/f	**2,885**	**2,942**	**2,974**	**2,962**	**2,643**	**1,846**	**(52)**	**(2,805)**	**(4,813)**	**(8,508)**	**(13,221)**	**(19,404)**	**(26,940)**	**(34,374)**	**(44,202)**
Major Repairs Reserve Interest	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other Capital Receipts Reserve Interest	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Debt Repayment Provision Interest	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
RTB Receipts for Repl Homes Interest	667	655	604	541	476	410	342	274	204	133	61	12	(0)	(0)	(0)
Other RTB Receipts Interest	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Revenue Reserve Interest	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Operating Account Interest	90	92	85	81	64	22	(51)	(126)	(216)	(350)	(523)	(741)	(980)	(1,256)	(1,582)
HRA Surplus / (Deficit) c/f	**2,942**	**2,974**	**2,962**	**2,643**	**1,846**	**(52)**	**(2,805)**	**(4,813)**	**(8,508)**	**(13,221)**	**(19,404)**	**(26,940)**	**(34,374)**	**(44,202)**	**(54,732)**

Agenda Item 7

Classification:	Decision Type:
Open	Key

Report to:		Date:
	Overview & Scrutiny Committee	10 February 2026
	Cabinet	11 February 2026
	Council	25 February 2026
Subject:	The Council's 2026/27 Revenue Budget and Medium-Term Financial Strategy (MTFS) for 2027/28 through to 2028/29	
Report of	Cabinet Member for Finance and Transformation	

Summary

1. This report sets out the key elements of the 2026/27 budget proposals and the framework for the longer-term Medium Term Financial Strategy (MTFS) 2027/28 to 2028/29. It makes available the latest financial information that will underpin the 2026/27 budget and the MTFS. The report also sets out the process that will lead to the agreement of the budget and the setting of the 2026/27 Council Tax at Council on the 25 February 2026.

2. This report reflects the Government's Provisional 2026/27 Local Government Finance Settlement published in December 2025. The financial tables within the report focus on a three-year period.

3. The Housing Revenue Account is a separate report on this agenda, this report is part of the suite of financial reports including: -
   - Council Tax Setting
   - Treasury Management Strategy 2026/27
   - Capital Strategy 2026/27 to 2028/29
   - The Dedicated Schools Grant and the schools' budget 2026/27

4. To present to members the 2026/27 budget and the updated budget position over the three years to 2028/29, comprising:
   - Refreshed budget assumptions and funding movements.
   - Revenue budget proposals**.**

5. To inform members of the updated budget gap of £22.589m for the three years 2026/27 to 2028/29 before applying any of the offsetting revenue budget proposals, comprising:
   - 2026/27 £4.977m
   - 2027/28 £10.355m
   - 2028/29 £7.257m

6. To present draft budget proposals totalling £1.434m in addition to those presented and agreed at December Cabinet, which are in line with the Council's strategy to close the budget gap over the medium-term.

7. To inform members of the remaining budget gap of £21.155m, comprising:
   - 2026/27 £3.977m
   - 2027/28 £9.921m
   - 2028/29 £7.257m

8. To inform members of the forecast reserves position over the three years 2026/27 to 2028/29. Appendix 6 – Chief Finance Officer Statement includes details on the robustness of the estimates and reserves as required in S25 of the Local Government Act 2003.

Role of Overview and Scrutiny Committee in the budget process

9. Under the Council's Constitution, the Overview and Scrutiny Committee is required to advise and consider the Cabinet's budget Council Tax proposals and report to Cabinet on the outcome of its deliberations before the matter is referred to Council.

10. In considering the budget proposals, the Committee can challenge how the budget has been constructed. It may wish to probe the assumptions that lie behind the budget strategy, what are the main savings proposals, how will any growth be funded, and has an appropriate level of reserves been set.

11. The Committee will also need to maintain a 'big picture' three-year view of the financial pressures affecting the Council and understand how these might impact on existing budget and budget setting in subsequent years. These issues are set out in the Financial Context and Background section below.

Recommendation(s)

Overview and Scrutiny Committee is asked to**:**

- Note the report
- Consider whether they wish to make any comments and recommendations to Cabinet on the content of this report.

The Cabinet is asked to approve the recommendations and commend to Council the following:

12. Approve the Medium-Term Financial Strategy to 2028/29 and the assumptions regarding resources and spending requirements.

13. Approve the Council Tax base for Bury Council for 2026/27 of 58,709.94 Band D equivalent dwellings, this is the basis on which the Council Tax funding has been calculated (Appendix 1).

14. Approve the net revenue budget of £252.135m for 2026/27.

15. Approve the Council Tax requirement of £124.224m and the increase in Council Tax in 2026/27 of 2.99% in terms of General Council Tax and a further 2% for the Adult Social Care precept for 2026/27 (Appendix 1).

16. Approve the budget assumptions of £29.364m in 2026/27.

17. Approve new revenue budget proposal relating to additional Place Directorate income to be achieved across 3 areas: car parking, moving vehicle offences and EV cross pavement fees. Delivery plans will be brought forward for consideration by Cabinet in the new financial year, including the detail of any specific consultation exercises that may be required to be undertaken. The consultation outcomes will be considered by Cabinet before implementation along with any financial implications adopted in the 2027/28 budget proposed by Cabinet to Council.

18. Note the remaining budget gap of £21.155m over the medium-term to 2028/29.

19. Approve the use of £3.977m of reserves from the budget stabilisation reserve for 2026/27.

20. Note the forecast position on reserves over the medium-term to 2028/29.

21. Approve the recommendations set out in the Treasury Management Strategy (Appendix 2):
    - To approve the Treasury Management Strategy including the associated Prudential Indicators and Annual Investment Strategy.
    - To approve the Treasury Management Policy Statement.
    - To approve the Minimum Revenue Provision (MRP) Policy Statement.

22. Approve the Capital Strategy and the Programme for 2026/27 – 2028/29 (Appendix 3).
    - Cabinet to recommend and council to approve the use of £2m flexible use of capital receipts in 2026/27.

23. Approve the Dedicated Schools Grant budget for 2026/27 at £257.345m and approve the allocations between the four funding blocks as set out in Appendix 4 of this report.
    - The Schools and Academies 2026/27 funding unit values as recommended by Schools Forum and detailed at Annex 1 to appendix 4.
    - Approve the 2026/27 hourly rates for all early year's providers as follows:
        i. £5.77 per hour for 3- and 4-year-olds.
        ii. £8.35 per hour for 2-year-olds.
        iii. £11.30 per hour for under 2's.

24. Note the Equality Impact Assessment for the budget report (Appendix 5).

25. Note the Chief Finance Officer (Director of Finance) statement on the robustness of estimates and adequacy of financial reserves in setting the budget (Appendix 6).

Reasons for recommendation(s)

26. 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

27. The current assumption within the 2026/27 budget and medium term is for an ongoing 4.99% annual Council Tax increase (2.99% general precept and 2% adult social care precept). The government's Core Spending Power calculations include the assumption that Councils will increase the Council Tax by these percentages.

28. An alternative option could be made to increase its 'relevant basic amount of council tax' above the levels set out in the Provisional 2026/27 Local Government Finance Settlement published in December 2025 of 4.99%, but this would require holding a local referendum and a majority vote.

29. A 1% increase or decrease in Council Tax is the equivalent to c.£1.242m

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Background

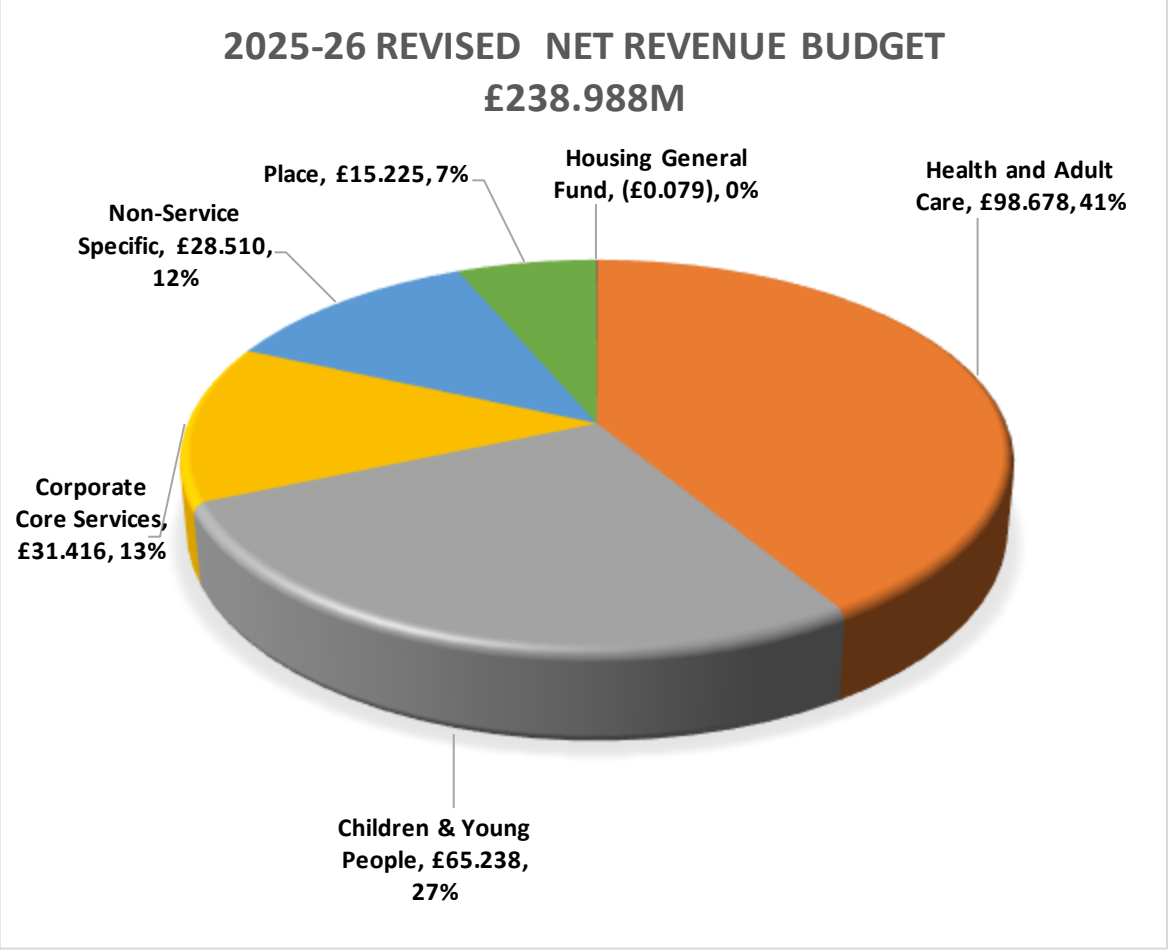
2025/26 Base Budget

30. The budget report presented to Budget Council on 19 February 2025 set out the Council's budget requirement for the 2025/26 financial year and provided details on the Council's reserves position. This process is in accordance with statutory requirements and proper accounting practices.

31. Council approved a net revenue budget of £238.257m for 2025/26, which included an approved use of reserves of £5.858m held within the Non-Service Specific Directorate, to address the structural funding deficit and balance the revenue budget.

32. Following updates to the 2025/26 Local Government Finance Settlement, Cabinet on 15 January 2026 approved an updated net revenue budget of £238.988m.

33. The graph below shows the representation of the net revenue budget of £238.988m by Directorate.



34. A further analysis of the net revenue budget by type of expenditure & income shows the main areas of budget spend being staffing, demand & contracts and sales fees & charges, as shown in the table below:

Budget Group	Inc/Exp	Budget Control Group	Revised Budget £m
Net Budget	Exp	Staff & Related Expenses	£111.087
Net Budget	Exp	Demand & Contractual	£175.408
Net Budget	Exp	Other Expenditure	£22.702
SERVICE EXPENDITURE TOTAL			**£309.20**
Net Budget	Inc	Government Grants	(£6.833)
Net Budget	Inc	Other Grants & Contributions	(£0.963)
Net Budget	Inc	Sales, Fees & Charges	(£42.869)
Net Budget	Inc	Other Income	(£39.271)
SERVICE INCOME TOTAL			**(£89.937)**
SERVICE RECHARGES TOTAL			**(£17.087)**
SERVICE RESERVES TOTAL			**£0.225**
Net Budget		Housing Benefit	(£0.292)
Net Budget		Precepts & Levies	£29.212
Net Budget		Treasury & Capital Financing Costs	£6.813
Net Budget		Provisions & Contingency	£0.815
OTHER EXPENDITURE & INCOME ITEMS TOTAL			**£36.548**
NET REVENUE BUDGET TOTAL			**£238.947**
Funding		Council Tax	(£119.350)
Funding		NNDR	(£74.276)
Funding		Funding Grants	(£39.503)
FUNDING TOTAL			**(£233.129)**
CORPORATE RESERVES TOTAL			**(£5.818)**
GENERAL FUND TOTAL			**£0.00**

2025/26 Q2 Forecast Outturn Position

35. Delivery of the 2025/26 budget is critical to maintaining the Council's future MTFS position and budget proposals, as emerging and recurrent additional demand and cost pressures will increase the budget gap position.

36. The 2025/26 quarter 2 position presented to 15 January 2026 Cabinet showed projected forecast £5.861m overspend (2.45%) against the net revenue budget of £238.988m, as shown in the table below.

37. The three main areas contributing to the £5.861m overspend are:
- Adults: the Care in the Community budget is forecast to overspend by £3.422m (5.50%).
- Children's: The Safeguarding and Social Care service budget is forecast to overspend by £4.492m (9.05%) and Home-to-School Transport is forecast to overspend by £0.440m (9.22%).

- Corporate Core Services: Homelessness overnight accommodation is forecast to overspend by £0.498m (29.37%).

38. However, two main areas are contributing towards reducing the overall forecast overspend:
    - Treasury Management: is forecast to underspend by £1.975m (31.17%) mainly in relation to higher than budgeted income from treasury investments alongside reduced borrowing costs reflecting the reprofiled capital programme.
    - Adult Social Care Operations is forecast to underspend by £1.127m (12.01%) mainly due to staffing vacancies across the teams

39. The overspending service areas make-up a significant and increasing proportion of the revenue budget reflecting the additional demand for, and cost of, the services being commissioned, which are national issues and not unique to Bury. As part of the new governance arrangements introduced as part of the council's improvement plan, the S151 officer chairs a monthly finance board with has responsibility for monitoring the in-year revenue budget and updating the medium-term financial strategy, including the development of budget proposals, with onward reporting to the Executive Leadership Team and Member Assurance Group. Whilst the forecast variance remains a relatively small proportion of the budget, officers have been prioritising work on cost control measures targeted at mitigating the impact of increasing demand 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 support funding gaps and invest in service transformation.

2025/26 Quarter 2 Forecast Outturn	Revised Budget £m	Forecast Outturn £m	Forecast Variance £m	Forecast Variance %
Directorate:				
Health and Adult Care	£98.678	£100.384	£1.706	1.73%
Children & Young People	£65.238	£67.418	£2.181	3.34%
Corporate Core Services	£31.416	£34.510	£3.094	9.85%
Non-Service Specific	£28.510	£26.624	(£1.886)	-6.62%
Place	£15.225	£15.990	£0.766	5.03%
Housing General Fund	(£0.079)	(£0.079)	£0.000	0.00%
NET REVENUE BUDGET	**£238.98750**	**£244.847**	**£5.861**	**2.45%**
Funding:				
Council Tax	(£119.350)	(£110.198)	£0.000	0.00%
Business Rates	(£74.276)	(£74.276)	£0.000	0.00%
Government Funding Grants	(£39.503)	(£39.503)	£0.000	0.00%
FUNDING	**(£233.129)**	**(£223.977)**	**£0.000**	**0.00%**
Use of Reserves:				
Budget Stabilisation Reserve	(£5.858)	(£5.858)	£0.000	0.00%
USE OF RESERVES	**(£5.858)**	**(£5.858)**	**£0.000**	**£0.000**
BUDGET POSITION	**£0.000**	**£15.012**	**£5.861**	**2.45%**

Financial Overview

National Context – Fair Funding Review

40. It has been widely accepted that the current funding system for local government is out of date and no longer fair. The Far Funding Review 2.0 (FFR) has updated the methodology for distributing the total quantum of funding between local authorities currently covered by the Local Government Finance Settlement.

41. The underlying data which determines the current distribution method was last updated in 2013, when the Business Rate retention system was introduced and as such the review has been largely welcomed across the sector. As the government have reduced grant funding to councils and council tax income has continued to grow, the proportion of council funding raised by local taxation has increased, which benefits those councils with a greater ability to raise income via Council Tax. This has resulted in a weakening of the relationship between the relative needs and resources and the actual allocations through the Settlement Funding Assessment

42. The government carried out a comprehensive consultation which the Council responded to in line with the deadline of 15 August 2025. The consultation reflected many issues raised previously and recommended incorporating evidence-based factors within the new funding formulas, including deprivation, key demand drivers and updated population levels. An “area cost adjustment” was included which attempts to allow for relative differences in the cost of delivery of services across different areas. Lastly, there was an adjustment for council tax equalisation reflecting the relative ability of local authorities to raise revenues themselves via council tax.

43. In addition to the review of needs and resources, the Government has rolled further grants into the Settlement Funding Assessment, such as approximately £10bn of social care funding. These grants have then been redistributed via the FFR process and Local Government Finance Settlement.

44. Government estimates that there are currently approximately 300 revenue grant streams and has simplified and consolidated these into the four main pillars below:

- Homelessness and Rough Sleeping
- Public Health
- Crisis and Resilience (Household Support Fund and Discretionary Housing Support)
- Children’s Families and Youth Grants

45. There have been several changes to the Business rates retention system (BRRS) in 2026/27 which will take place concurrently including:

- The business rates baseline has been reset for 2026/27, with the growth redistributed based on a needs assessment.

- A revaluation in 2026 will be implemented from 1 April 2026.
- New reduced business rates multipliers will be introduced for Retail, Hospitality and Leisure (RHL hereditaments, paid for by increases in multipliers for large businesses with rateable values over £500,000.
- Existing multipliers have been indexed

46. The forecast impact of the settlement was built into the December 26-27 budget report supported by work undertaken by our advisors LG Futures.

47. There remained a risk that data sets could be updated before the final settlement which would impact on distribution of funding.

Local Government Finance Settlement (LGFS)

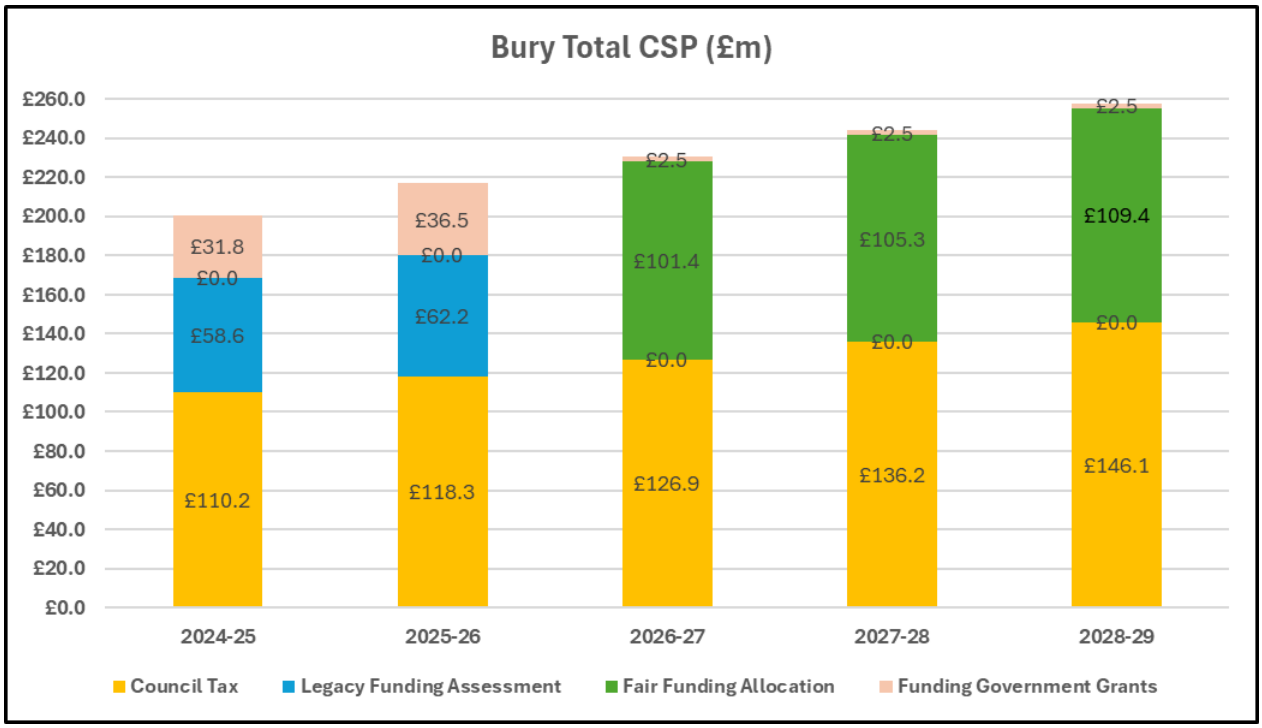
48. To provide funding certainty and allow councils to plan ahead, on 17th December 2025 the Government published a provisional three-year funding settlement for councils which has not been done since 2016/17 to 2019/20 and as such the councils ability to forecast future funding levels with a greater degree of certainty and to strategically forward plan has been improved.

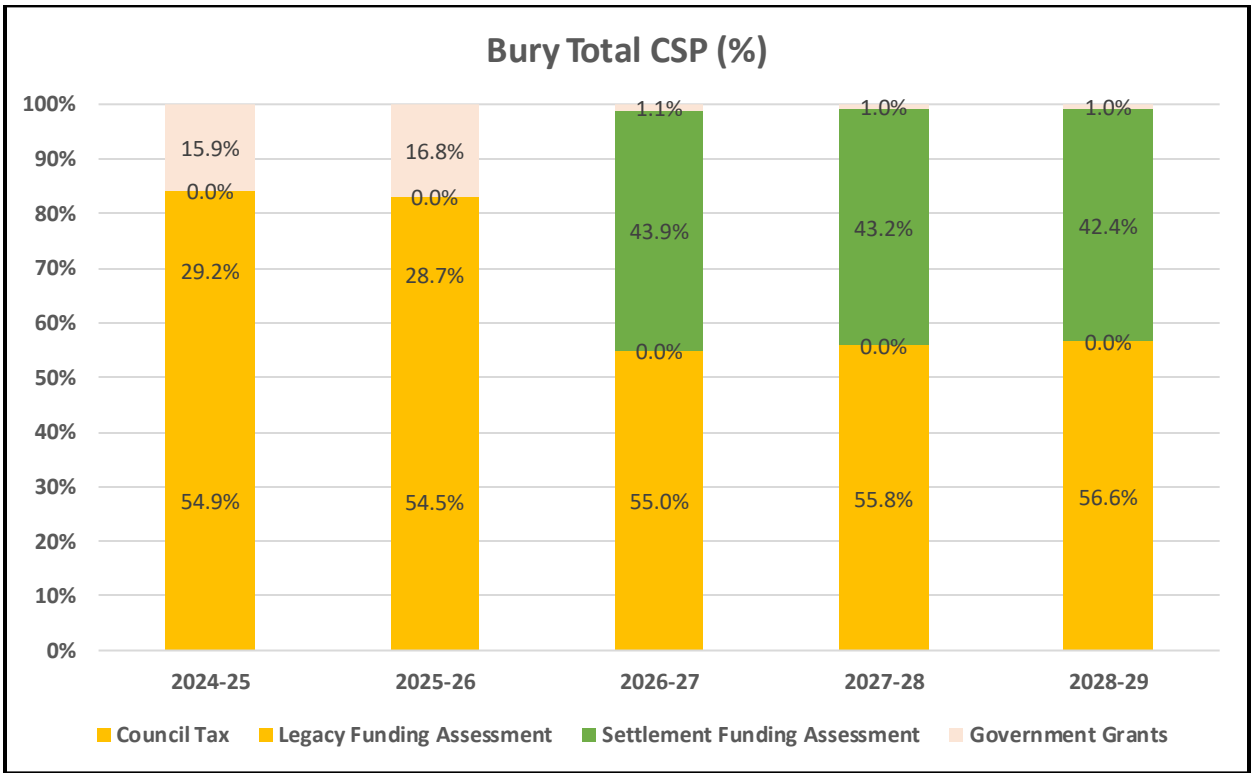
49. Core Spending Power (CSP) is a measure of the resources available to local authorities to fund service delivery. It sets out the money that has been made available to local authorities through the LGFS.

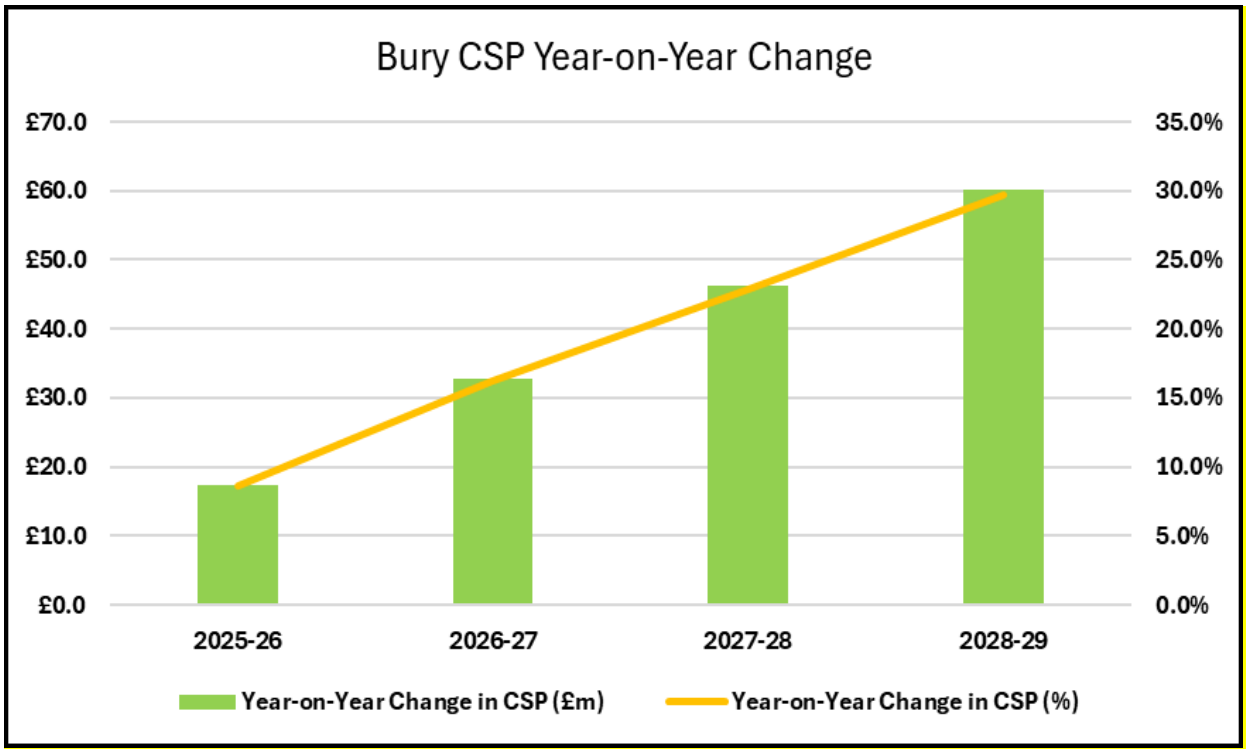
50. The key headlines for Bury are as follows:
    - Core Spending power will increase by an average of 6% nationally including council tax increases in 2026-27, for Bury the provisional Core Spending Power increase is 7.01% in 2026/27 inclusive of assumed maximum council tax increases.
    - Council Tax general 'relevant basic amount' limit set at 2.99%
    - Council Tax Adult Social Care Precept set at 2%
    - The Recovery Grant of £600m nationally which was previously assumed to be one-off in 2025-26 has been reinstated for 2026-27 to 2028-29, Bury's allocation in £2.488m.

51. The graph below sets out the figures for local authority Core Spending Power (CSP) from 2024/25 through to 2028/29. [Note figures for 2024/25 and 2025/26 have been adjusted to ensure a consistent measure of local authority income over time].

52. Within the published CSP are 4 consolidated service grants (see para 44.) which are ringfenced to be utilised to fund specific service delivery and as such, they have been excluded from the table below.


Bury Total CSP (£m)
£260.0
£240.0
£220.0
£200.0
£180.0
£160.0
£140.0
£120.0
£100.0
£80.0
£60.0
£40.0
£20.0
£0.0
£31.8
£0.0
£58.6
£110.2
£36.5
£0.0
£62.2
£118.3
£2.5
£101.4
£0.0
£126.9
£2.5
£105.3
£0.0
£136.2
£2.5
£109.4
£0.0
£146.1
2024-25
2025-26
2026-27
2027-28
2028-29
Council Tax
Legacy Funding Assessment
Fair Funding Allocation
Funding Government Grants


Bury Total CSP (%)
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
15.9%
0.0%
29.2%
54.9%
16.8%
0.0%
28.7%
54.5%
1.1%
43.9%
0.0%
55.0%
1.0%
43.2%
0.0%
55.8%
1.0%
42.4%
0.0%
56.6%
2024-25
2025-26
2026-27
2027-28
2028-29
Council Tax
Legacy Funding Assessment
Settlement Funding Assessment
Government Grants



Statistics

53. The tables below provide a geographical analysis of both Council Tax & Core Spending Power (CSP) by population & number of dwellings over Greater Manchester authorities.

Council Tax 2025-26						
GM Districts	Council Tax Requirement (CTR) (excl. local precepts) £m	Rank	Council Tax Base (CTB) for Council Tax Setting Purposes	Rank	Ave Band D (2 Adult equivalent) Council Tax (excl. local precepts)	Rank
Bolton	£150.550	5	82,271	4	£1,860.28	7
Bury	£118.296	10	58,698	10	£2,015.33	5
Manchester	£251.235	1	140,844	1	£1,783.78	8
Oldham	£122.581	9	59,501	9	£2,053.75	3
Rochdale	£123.170	8	59,825	8	£2,058.84	2
Salford	£161.401	3	78,626	6	£2,052.77	4
Stockport	£206.235	2	99,340	2	£2,076.06	1
Tameside	£124.513	7	66,773	7	£1,911.99	6
Trafford	£139.288	6	81,602	5	£1,721.59	9
Wigan	£160.918	4	98,600	3	£1,630.90	10

LGFS 2026-27								
GM Districts	2026-27 Core Spending Power (CSP) £m	Rank	Population Mid 2024	Rank	Population Projected 2026	Rank	Dwellings As At Oct 2025	Rank
Bolton	£387.786	4	289,581	4	290,499	4	129,231	5
Bury	£235.545	10	194,807	10	196,008	10	85,593	10
Manchester	£873.435	1	561,482	1	565,332	1	253,776	1
Oldham	£336.122	6	243,395	6	245,551	6	99,072	8
Rochdale	£335.012	7	229,332	9	231,838	9	98,159	9
Salford	£423.923	2	270,691	5	274,756	5	137,468	3
Stockport	£356.102	5	298,649	3	300,585	3	133,650	4
Tameside	£310.494	8	231,592	8	233,316	8	105,874	6
Trafford	£251.271	9	243,386	7	245,192	7	104,404	7
Wigan	£410.391	3	333,209	2	334,901	2	153,853	2

Analysis of CTR & CSP by Population & Dwelling								
GM Districts	2025-26 CTR (per head) £	Rank	2025-26 CTR (per dwelling) £	Rank	2026-27 CSP (per head) £	Rank	2026-27 CSP (per dwelling) £	Rank
Bolton	£519.89	7	£1,164.97	8	£1,339.13	6	£3,000.72	5
Bury	£607.25	2	£1,382.08	2	£1,209.12	8	£2,751.91	7
Manchester	£447.45	10	£989.99	10	£1,555.59	2	£3,441.76	1
Oldham	£503.63	8	£1,237.29	5	£1,380.97	4	£3,392.70	3
Rochdale	£537.08	6	£1,254.80	4	£1,460.82	3	£3,412.95	2
Salford	£596.26	3	£1,174.10	7	£1,566.08	1	£3,083.80	4
Stockport	£690.56	1	£1,543.10	1	£1,192.38	9	£2,664.44	9
Tameside	£537.64	5	£1,176.05	6	£1,340.69	5	£2,932.67	6
Trafford	£572.29	4	£1,334.13	3	£1,032.40	10	£2,406.72	10
Wigan	£482.93	9	£1,045.92	9	£1,231.63	7	£2,667.42	8
Average	**£549.50**		**£1,230.24**		**£1,330.88**		**£2,975.51**	

54. Core Spending Power (CSP): Bury receives the 8th lowest funding per head of population across the Greater Manchester authorities based on Core Spending Power (CSP) at a rate of £1,209.12 for 2026/27 compared to a GM Average of £1,330.88.

55. When we compare this to the position in 2025/26, we can see that Bury were still the 8th lowest funding per head of population across the Greater Manchester authorities at a rate of £1,067.58 compared to a GM Average of £1,138.00

56. If Bury received the average funding per head as its GM neighbours, it would benefit from an additional £23.720m per annum (this compares to a benefit of an additional £13.766m per annum in 2025/26)

2026/27 LGFS Fair Funding 2:0

57. Core Spending Power is a standardised national data comparator tool which aims to give consistent data for each local authority, and it utilises data from the standard 50% Business Rates Retention scheme where a local authority retains 50% of Business Rates income.

58. The Core Spending Power calculations do not reflect increased business rates retention arrangements to enable the funding allocations to be presented on a consistent basis and to allow, as far as possible, like for like comparisons between authorities.

59. Since April 2017, Bury has been part of an increased Business Rates Retention scheme, which means that 100% of Business Rates income is retained, however the Revenue Support Grant and the Public Health grant are forgone.

60. The Provisional 2026-27 Local Government Finance Settlement included additional funding for Bury with an additional c£12m by the final year of the 3 year settlement on top of existing forecasts with the increase being phased equally over the 3 years at an additional c£4m per year. The improved funding position however assumes that council tax is raised by the maximum levels permissible and has been supplemented by re-introduction of the Recovery Grant in the provisional settlement that was received by most, but not all, councils in 2025/26 but was not originally expected to continue. However, the improved settlement needs to be viewed in the context that the demand and inflationary growth pressures are predicted to exceed these levels, with the HAC provider fee increases alone (inclusive of Real Living Wage costs) forecast to cost an additional £6.7m per year.

61. DEFRA has confirmed the Extended Producer Responsibility Grant indicative funding of £1.935m for 2026/27 Bury. The funding will be provided based on actual income collected net of allowable costs and as such may vary from the indicative value. If is anticipated that the incentivisation to reduce packaging will result in lower values being received via this grant in future years and this has been reflected in the MTFS.

62. The council tax assumptions in the Fair Funding Review are higher than the latest forecast position which has the impact of dampening the available funding to Bury via council tax income. Whilst it is assumed that the council tax is raised by the maximum levels permissible, the growth in the council tax base from new developments being weaker than both previously forecast and the settlement assumed growth which is mainly due to viability issues with planned schemes.

63. The tables below show an analysis across GM authorities & nationally of the Deprivation Indices which the government used as part of the Fair Funding formulas.

Indices of Multiple Deprivation Analysis						
GM Districts	**Overall IMD score**	**GM Rank**	**National Rank (of 296)**	**Population**	**GM Rank**	**National Rank (of 296)**
Bolton	30.3	5	38	299,153	3	48
Bury	23.0	8	104	194,590	10	103
Manchester	38.0	1	3	566,778	1	6
Oldham	34.7	2	14	243,993	6	77
Rochdale	33.2	3	20	226,950	9	83
Salford	31.5	4	27	278,867	5	58
Stockport	17.9	9	164	297,191	4	50
Tameside	29.2	6	45	232,806	8	80
Trafford	14.9	10	201	236,651	7	78
Wigan	25.0	7	80	334,014	2	31
Average	**27.76**			**291,099**		

Budget Process

2026/27 Budget Approach

64. The vision for Bury 2030 is built upon conversations with communities and with a simple goal for Bury to:

Stand out as a place that is achieving faster economic growth than the national average, with lower than national average levels of deprivation.

Progress to achieving the ambition for Bury 2030 will be measured by tracking seven core outcome measures of:

1) Improved quality of life.
2) Improved early years development.
3) Improved educational attainment.
4) Increased adult skill levels and employability.
5) Inclusive economic growth.
6) Carbon neutrality by 2038.
7) Improved digital connectivity.

65. The Let's Do It! strategy of:

Let's … All work together with a common approach.
Do it! … Deliver on our plans for community and economic development where we all play a part.

Sets out four clear principles that will drive everything the Council does of

1) **Local** neighbourhoods.
2) An **Enterprising** spirit.
3) Delivering **Together**.
4) A **Strengths-based** approach.

66. Rolling two-year delivery plans will be produced with a clear set of priorities to create the conditions for change. The current 2025-26 Corporate Plan sets out the vision for a council that is financially sound, delivers its statutory responsibilities and contributes to the Borough's LET'S Do It! outcomes.

67. The three core overarching priorities remain unchanged for 2025/26 with an additional enabling priority added, delivery of which will also secure financial stability. The priorities overlay the "business as usual" departmental functions which are described separately in service planning documents.

The three core strategic priorities are defined as follows:

1) **Sustainable Inclusive Growth** – Further delivery of sustainable housing, the levelling up programmes, strategic regeneration along with the Local Plan, Northern Gateway Masterplan and our continued commitment to carbon neutrality.
2) **Improving Children's Lives** – This priority details Educational Improvement including the three A's (Attainment, Attendance and Academisation) and the continued delivery of the SEND and Social Care improvement plans.
3) **Tackling Inequalities** – Since the pandemic our inequalities have widened and therefore this continues to be a key priority in 2024/25 including a review of the wider determinants of health: work, housing anti-poverty, tackling behaviours that lead to poor outcomes, system wide prevention and targeted interventions within our neighbourhoods.

68. The connection between these priorities of the Corporate Plan and the MTFS have been illustrated through the increased demand data for Children's Social Care, SEND, Adult Social Care and Housing, all of which have placed in year pressures on the budget as reflected in the current in-year forecast outturn position outlined earlier in the report. As such, further work has been undertaken to look at how work on these areas can be re-focused to reduce in-year pressures and support the budget strategy.

Budget Movements: Assumptions & Funding

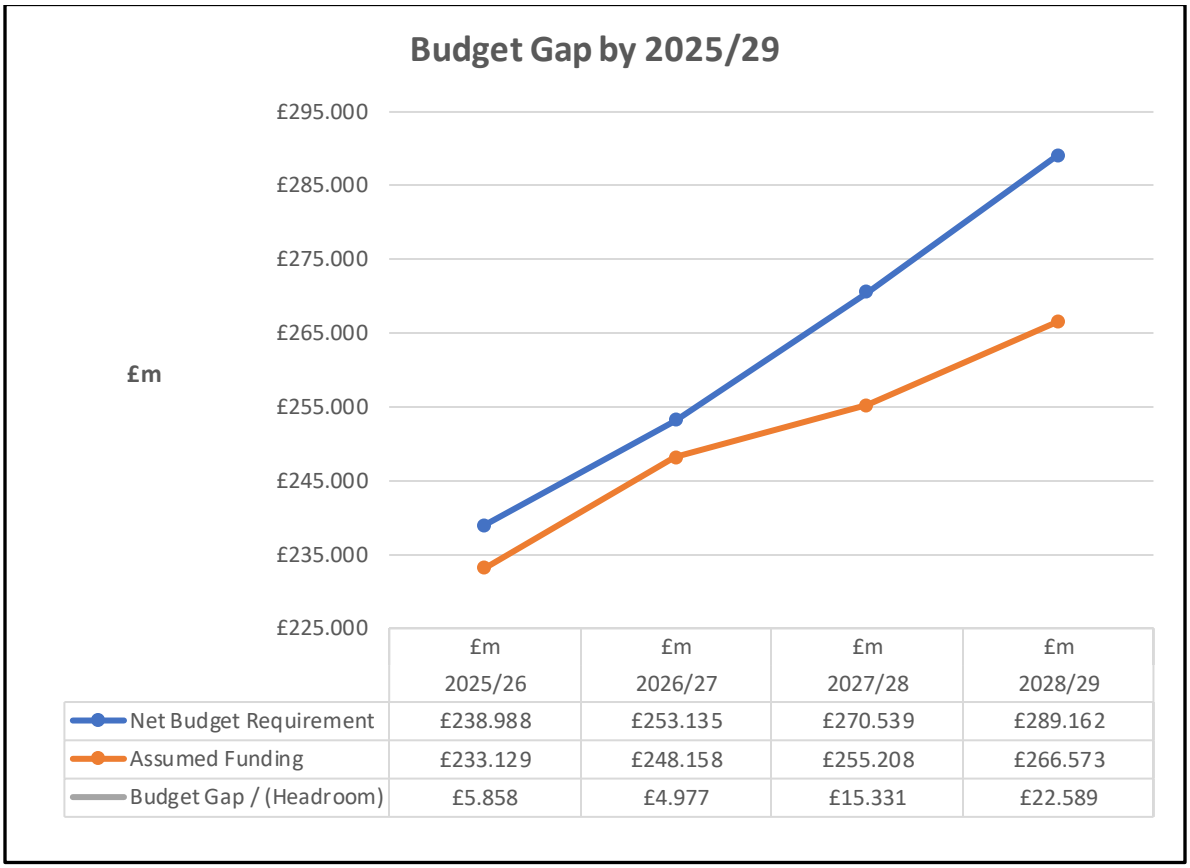
69. The position reported to Cabinet on 6 November 2025 showed an overall budget gap of £16.000m in 2026/27 which reduced to £7.547m after budget proposals. Since December, a review of the MTFS budget assumptions and assumed funding has been undertaken in light of the Provisional Local Government Finance Settlement and the assumptions for 2027/28 and 2028/29 are now included.

70. The table below summarises the budget movements, to show the budget gap position for the three-years 2026/27 to 2028/29 of £22.589m, before new savings proposals are included. As 2028/29 is the year being added onto the MTFS, all changes shown are total values, whereas in 2026/27 and 2027/28 the assumptions shown are adjustments to the values already included in previous MTFS reports.

2026/27 - 2028/29 Budget Movements Summary	2026/27 £m	2027/28 £m	2028/29 £m
BUDGET GAP [FEBRUARY 2025]	**£9.612**	**£1.960**	**(£0.100)**
Budget Assumptions Movements:			
Revision of Pay Award Assumptions	£1.162	£1.211	£3.371
Revision of Pensions 3-Year Triennial review	(£1.620)	£0.000	£0.000
Contractual Inflation	£0.358	£4.358	£3.536
Addition of ICB joint funding assumptions	£0.130	£0.003	£0.003
Revision of the Corporate Budget Assumptions	£0.830	£0.500	£2.000
Update of levy assumptions	(£2.069)	£2.964	£1.240
GMCA Partial reset share	(£0.503)	£0.000	£0.000
Update Adults Inflation (incl. RLW) & Demand Assumptions	£0.324	(£0.319)	£9.055
Update Children's Inflation (incl. RLW) & Demand Assumptions	£5.927	(£1.922)	£1.864
Update Corporate Core Services pressures including Temporary Accommodation and Insurance	£3.200	(£0.583)	£0.542
Update Place Inflation & Demand Assumptions	£0.850	£0.500	£0.000
NET BUDGET MOVEMENT	**£8.588**	**£6.712**	**£21.610**
Funding Movements:			
Council Tax Base update	£1.792	£0.822	(£7.593)
Business Rates estimated update for FFR2.0 / insertion of 28/29	(£38.417)	(£2.839)	(£4.418)
Revisions of Funding Grants per FFR2.0	£0.000	£0.000	£0.000
Addition of Business Rates Grant per FFR2.0	£0.000	£0.000	£0.000
Update of Collection Fund Prior-Year Estimated Surplus/Deficit	(£2.699)	£3.693	£0.000
Provisional Settlement Grant update	£37.817	£2.987	£0.000
Provisional Settlement Recovery Grant	(£2.488)	£0.000	£0.000
Extended Producer Responsibility Grant	(£0.774)	£0.258	£0.645
ASSUMED FUNDING MOVEMENT	**(£4.770)**	**£4.921**	**(£11.366)**
SAVINGS PROPOSALS APPROVED DECEMBER 2025	**(£8.453)**	**(£3.237)**	**(£2.887)**
UPDATED BUDGET GAP [FEB 2026]	**£4.977**	**£10.355**	**£7.257**
CUMULATIVE BUDGET GAP [FEB 2026]	**£4.977**	**£15.332**	**£22.589**

71. The chart below shows the budget gap of £22.589m over the three years 2025/26 to 2028/29, whilst Council on 19 February 2025 approved a budget, this is supported by £5.858m use of reserves.

72. The chart below excludes the use of reserves, to demonstrate that the net revenue budget and future cost & demand pressures to deliver services exceeds the current level of funding provided by Government to the Council.



	£m 2025/26	£m 2026/27	£m 2027/28	£m 2028/29
Net Budget Requirement	£238.988	£253.135	£270.539	£289.162
Assumed Funding	£233.129	£248.158	£255.208	£266.573
Budget Gap / (Headroom)	£5.858	£4.977	£15.331	£22.589

Budget Assumptions

73. Budget assumptions increase by £74.759m over the three years 2026/27 to 2028/29, significant items include:

- **Pay Award:** has been increased from 2% to 3% for 2026/27 and 2027/28 fand included at 3% for 2028/29, to reflect revised inflation forecasts.

- **Capital Financing:** the re-phasing of the capital programme, agreed at the December Cabinet meeting, has been factored into a revised borrowing profile and impact on forecast revenue capital financing costs.

- **Real Living Wage:** 6.7% uplift for 2026/27 as confirmed by the Living Wage Foundation, and 5% for both 2027/28 & 2028/29.

- **Adults Community Care Budget:** inflation increase of 2% for all three years and demand growth of £0.538m (0.62%) for 2026/27, £1.199m (1.38%) for 2027/28 & £1.980m (2.28%) for 2028/29.

- **Adults Transition Budget:** demand growth of £2.377m (2.26%) for 2026/27, £0.837m (0.80%) for 2027/28 and £1.607m (0.1.49%) for 2028/29.

- **Children Looked After Budgets:** inflation (5%) and demand reduction based on a targeted child-by-child step down plan to reduce the number of residential placements and estimated demand reduction due to additional actions linked to the Families First funding which accelerates in the later years of the MTFS.

- **Homelessness / Temporary Accommodation:** An additional £1.1m has been included as growth in the 2026/27 budget reflecting the increased demand for support.

- **Flexible Use of Capital Receipts:** the flexibility for councils to use capital receipts to be support revenue expenditure that delivers service transformation has been extended and £2m is included for 2026/27. The £2m will be used to support the revenue budget and will be applied to Adults and Children's Social Care £0.600m, enabling services across the Corporate Core including Procurement £0.400m, Finance £0.350m, HR £0.350m and digital £0.300m. These amounts will support transformational activity resulting in reductions in revenue requirement in future years.

- **Insurance:** an additional £1.144m has been included in the 2026/27 budget reflecting the increase in the cost of the council's insurance cover following the re-tender completed in March 2025.

- A reduction in the employer pension contribution rate from 19.5% to 15.7% for the next 3 years reflecting the outcome of the actuarial triennial review reflecting the continued strong investment performance of Greater Manchester Pension Fund.

Funding

74. Assumed funding increases by £27.586m over the three years 2026/27 to 2028/29, significant items include:

- **Council Tax Base:** 0.02% increase for growth in for 2026/27 and 0.75% growth for 2027/28 and 2028/29 and an increase in the collection rate of 0.5% for 2026/27. The growth assumptions have reduced from 1.46% to 0.2% in 2026/27 due to current prevailing economic conditions impacting the forecast

completions resulting either in delays or projects deemed no longer viable. The collection rate increase represents an ambitious improvement target for the service with every additional 1% collected equating to an additional c.£1.2m of income and will therefore be closely monitored.

- **Council Tax Relevant Basic Amount:** on-going assumption that government will keep the referendum limit at the current 2.99% over the three years.

- **Council Tax Social Care Precept:** on-going assumption that government will continue with the social care precept of 2% over the three years.

- **Collection Fund (Surplus)/Deficit:** assumed increase in the collection of arrears and reduction in the arrears provision for 2026/27. The nature of this is that the estimated surplus is reversed in future years. The regulations require that collection fund in year surplus / deficit estimates are produced in the January in advance of the end of the financial year, (i.e. January 2026 for the 2025/26 financial year).

  These estimated surplus / deficits are actualised in the following financial year i.e. the 2025/26 surplus will be received in 2026/27. This estimated surplus is then removed from the 2027/28 budget assumptions as any potential surplus / deficit in relation to the financial year 2026/27 will be calculated in January 2027 and received in 2027/28 but cannot be assumed in at this stage.

  The estimated surplus has arisen due to the revised calculations of the amount required to be contributed to the allowances for impairment. The improved collection of aged debt has meant that a decrease in the allowance for impairment is estimated for both council tax and business rates, whilst a reduced loss due to checks, challenges and appeals has resulted in a decrease in the allowance for impairment of appeals for business rates.

- **Business Rates including rolled in Government Funding Grants:** the Fair Funding Review has resulted in the majority of funding grants being rolled into the increased Business Rates retention scheme and a c£4m net benefit per year.

Summary

75. A subjective breakdown of the updated £22.589m budget gap is shown in the table below:

Table 2.	Feb-26		
2026/27 - 2028/29 Budget Estimates	2026/27 £m	2027/28 £m	2028/29 £m

Net Budget b/fwd	£238.988	£253.135	£270.541
Budget Assumptions:			
Pay Award	£3.326	£3.311	£3.371
Pay Base Movements	(£2.380)	(£0.174)	(£0.041)
Employee Vacancy/Scale Factor	£0.000	£0.000	£0.000
Agency Staff	(£0.530)	£0.000	£0.000
Contractual Inflation	£7.410	£6.764	£6.861
Real Living Wage	£4.562	£3.847	£3.306
General Inflation	£0.004	£0.000	£0.083
Demand/Volume/Activity Base Movements	£12.229	£2.780	£4.744
Grants, Contributions & Income Recovery	(£0.531)	£0.000	£0.000
Sales, Fees & Charges Levels	£0.075	£0.000	£0.000
Recharges HRA, School, Capital & Internal	£0.140	£0.043	£0.045
Service Reserve Movements	£0.000	£0.000	£0.000
Housing Benefit	£0.000	£0.000	£0.000
Precepts & Levies	£1.296	£2.964	£1.240
Treasury & Capital	(£0.241)	£2.750	£0.500
Provisions & Contingency	£4.004	£1.500	£1.500
Other	£0.000	£0.000	£0.000
Total Budget Assumptions	**£29.364**	**£23.785**	**£21.608**
Approved Budget Proposals:			
Savings Proposals - approved prior years	(£6.763)	(£3.142)	(£0.100)
Savings Proposals approved December Cabinet	(£8.453)	(£3.237)	(£2.887)
Total Approved Budget Proposals	**(£15.216)**	**(£6.379)**	**(£2.987)**
NET BUDGET	**£253.135**	**£270.541**	**£289.162**
Assumed Funding:			
Council Tax	(£124.224)	(£131.408)	(£139.000)
Business Rates	(£115.765)	(£120.022)	(£124.440)
Prior Year Collection Fund (Surplus)/Deficit	(£3.746)	£0.000	£0.000
Government Funding Grants	(£4.423)	(£3.778)	(£3.133)
ASSUMED FUNDING	**(£248.158)**	**(£255.208)**	**(£266.573)**
ANNUAL INCREMENTAL BUDGET GAP	**£4.977**	**£10.355**	**£7.257**
CUMULATIVE BUDGET GAP	**£4.977**	**£15.332**	**£22.589**

Budget Proposals

Budget Proposals

76. Since February 2025 Budget Council as part of the agreed strategy, the Council has undertaken the following activities to identify further budget proposals to close the budget gap:

- Further detailed analysis & review of existing budgets.
- Held service budget review & challenge sessions through the zero based budgeting exercise.
- Implementation of a new gateway process to performance monitor existing budget proposals and the development of new budget proposals.
- Commencement of benchmarking & positioning exercise against Greater Manchester authorities and nearest neighbours.

77. The table below shows a summary of further budget proposals generated through since the December budget Cabinet paper and the impact of reducing the budget gap, a full listing of the draft budget proposals is provided in Appendix 1.

2026/27- 2028/29 Budget Proposals Summary	Feb-26		
	2026/27 £m	2027/28 £m	2028/29 £m
BUDGET GAP [FEB 2026]	**£4.977**	**£10.355**	**£7.257**
Draft Budget Proposals:			
Draft Budget Proposals (Operational Decision)	(£1.000)	£0.000	£0.000
Draft Budget Proposals (Policy Decision)	£0.000	(£0.434)	£0.000
Total Draft Budget Proposals	**(£1.000)**	**(£0.434)**	**£0.000**
ANNUAL INCREMENTAL BUDGET GAP	**£3.977**	**£9.921**	**£7.257**
CUMULATIVE BUDGET GAP	**£3.977**	**£13.897**	**£21.155**

78. The above table shows that by taking forward the further budget proposals the budget gap will reduce by £1.434m, from £22.589m to £21.155m.

Budget & Staff Consultation

79. The December Cabinet 26-27 budget paper identified savings proposals totalling £14.577m over the next 3 years which can be seen included within Appendix 1. These were all been assessed as for management action that are within delegated powers for officer decisions with none of the proposals requiring policy decisions that would require separate specific consultation to be undertaken. All of the budget proposals formed part of the overall budget consultation process which was undertaken.

80. Consultation took place from 4 December 2025 to 19 January 2026 in relation to budget setting principals and savings proposals. 726 responses were received – 86% of these were residents, 4% staff members, 4% Bury businesses, 3% other public sector organisations, and 1% other. The main headlines of the responses are:

- 91% of respondents strongly agreed or agreed with the principal of "using evidence to make sure money is spent where it is needed most".
- 86% of respondents strongly agreed or agreed with the principal of "encouraging more people to adopt a healthy lifestyle to reduce the demand for future care"
- 59% of respondents strongly agreed or agreed with the principal of "changing our fees and charges to encourage people to reduce harm in the environment"
- 52% of respondents strongly agreed or agreed with the principal of "moving more services online and using more technology in how we do things"
- 37% of respondents strongly agreed or agreed with the principal of "do more to increase income from business rates"
- Over half of respondents agreed with the first four budget setting principles, however 57% disagreed about doing more to raise income from council tax.
- 75% of respondents were aware of the need for the council to change the way it delivers it services
- 62% understood their role in helping to reduce the demand for services
- 55% accepted that budget reductions have to be made by the council
- 59% understood that inflation, the cost-of-living crisis and now significant increased demand have added to the Council's already difficult financial situation.
- There were a mixed range of responses to the leisure subsidy questions with the majority not in favour of reducing the overall budget, however accepting that there is an opportunity to modernise and commercialise the service and alongside this increase prices fairly and ensure that they are linked to value improvements. The proposal put forward for consideration is recommending a price increase of 10% for 3 years (6% above inflation), which would equate to an increase of £3.25 per month for 2026/27, and to invest in refurbishment and improvements to the sites.

Following consideration of the budget responses officers are not recommending any amendments to the budget proposals detailed in the December Cabinet report.

Management Actions

81. A total of £1.000m of savings have been identified as management actions rather than policy decisions and are not expected to have a negative impact on service delivery. The £1.000m workforce transformation saving will be achieved via management of vacancies, focussed recruitment and retention resulting in reductions of the premium paid for agency staff and additional use of AI to streamline processes with any resulting staff reductions then achieved through

turnover and reduced use of agency staff. This increases the £2m workforce savings target set out in the proposals agreed at December Cabinet.

Policy Decisions

82. The savings proposal in relation to potential additional income across 3 areas identified to be developed by the Place Directorate; Parking; Moving Vehicle Offences and EV cross pavement fees totalling £0.434m will be subject to a specific consultation process when fully developed proposals are brought forward to Cabinet in the new financial year, with the outcome of the consultation to be presented back to Cabinet once completed. The level of additional income included in the MTFS for 2027/28 is a prudent estimate and further work will be undertaken to produce detailed proposals and delivery plans which will include an updated estimated of the estimated additional income and any upfront or recurrent investment required to support delivery. Should the proposals not proceed following the outcome of the consultation the loss of forecast income would increase the forecast budget gap for 2027/28 and 2028/29.

83. The figures presented within the revised MTFS are on the assumption that the proposal will be agreed.

2026/27 Budget & 2027-29 MTFS Position

Budget Summary

84. A summary of all the movements to the December 2025 budget gap to the updated budget gap of £21.155m, is shown in the table below:

Table 6. 2026/27 - 2028/29 Draft Budget Summary	Feb-26		
	2026/27 £m	2027/28 £m	2028/29 £m
BUDGET GAP [DECEMBER2025]	**£7.547**	**£6.618**	**(£5.526)**
Net Budget:			
Budget Assumption Movements	(£1.279)	(£1.1843)	£9.355
Draft Budget Proposals	(£1.000)	(£0.434)	£0.000
TOTAL NET BUDGET MOVEMENTS	**(£2.279)**	**(£1.618)**	**£9.355**
Assumed Funding:			
Funding Movements	(£1.292)	£4.921	£3.427
TOTAL ASSUMED FUNDING MOVEMENTS	**(£1.292)**	**£4.921**	**£3.427**
ANNUAL INCREMENTAL BUDGET GAP	**£3.977**	**£9.921**	**£7.257**
CUMULATIVE BUDGET GAP	**£3.977**	**£13.897**	**£21.155**

Budget Table

85. Based on the current budget assumptions and proposals and assumed funding, the 2026/27 net revenue budget would increase by £13.148m (5.5%), from £238.988m to £252.135m, as shown in the table below:

Table 7. 2026/27 - 2028/29 MTFS Summary	Feb-26		
	2026/27 £m	2027/28 £m	2028/29 £m
Directorate:			
Health & Adult Care	£104.360	£109.238	£117.240
Children & Young People	£69.558	£73.204	£75.915
Corporate Core Services	£29.007	£28.422	£28.476
Non-Service Specific	£32.522	£41.517	£48.230
Place	£16.769	£16.805	£17.945
Housing General Fund	(£0.079)	(£0.079)	(£0.079)
NET BUDGET	**£252.135**	**£269.106**	**£287.728**
Assumed Funding:			
Council Tax	(£124.224)	(£131.408)	(£139.000)
Business Rates	(£115.765)	(£120.022)	(£124.440)
Prior Year Collection Fund (Surplus)/Deficit	(£3.746)	£0.000	£0.000
Government Funding Grants	(£4.423)	(£3.778)	(£3.133)
ASSUMED FUNDING	**(£248.158)**	**(£255.208)**	**(£266.573)**
ANNUAL INCREMENTAL BUDGET GAP	**£3.977**	**£9.921**	**£7.257**
CUMULATIVE BUDGET GAP	**£3.977**	**£13.898**	**£21.155**

Sensitivities, Risks & Opportunities

Sensitivity

86. A sensitivity of the significant budget assumptions & funding items is shown in the table below:

Sensitivity Analysis	Potential Full Year Impact of 1% Movement £m
Council Tax (level, taxbase and collection rates)	+/- £1.242
Pay Award	+/- £1.046
Real Living Wage	+/- £0.681
Adults Community Care: inflation and demand growth	+/- £1.050
Adults Transition Budget: demand growth	+/- £0.297

Children Looked After Budget: inflation and demand growth	+/- £0.870
Treasury & Capital Financing Costs	+/- £1.383

Risks & Opportunities

87. Legislation requires that annually the Council sets a balanced and robust budget, which is sufficient to meet its legal obligations, and then its aspirations. This requires all plans to be costed, forecasts and estimates to be checked for reasonableness, and risks to be assessed across the many varied services the Council provides. This also includes an assessment for emergencies, severe weather and other service and strategic risks.

88. Robustness does not guarantee that all possible eventualities are identified, or that all budget estimates are precise. Actual income and expenditure will likely vary from the approved budget, but in the round, these will offset one another, and the approved budget will be sufficient to meet overall expenditure requirements.

89. In exercising their statutory duty the Director of Finance, in conjunction with the Executive Leadership Team, will take all matters and issues into consideration and will make a reasoned assessment of whether the budget is sufficient and robust. The Director of Finance will ensure that the minimum reserve level is maintained to ensure the Council can meet its legal obligations.

90. The Council faces various financial risks including:

- The ability to deliver savings at agreed values and within agreed timescales.
- Potential legal challenges to decisions.
- Fees & charges income differing to assumptions.
- Variations to external funding and grant allocations.
- Demographic pressures.
- Inflation & interest rates differing to assumptions.
- Business Rates: potential costs of backdated appeals.
- Variations to external levies & contracts.
- Future changes to legislation.
- Failure of Project Safety Valve to comply with the management plan.
- Schools academisations deficits.
- The significant financial challenge currently being faced by the NHS locally.

91. In reviewing its medium-term financial plans, the Council is also guided by its financial advisers, Arlingclose. The following is a summary of their advice for the planning period that have been reflected in the MTFS.

- The Bank rate was cut to 3.75% by the Bank of England's Monetary Policy Committee (MPC) in December 2025, as expected. The vote to cut was 5-4, with the minority instead favouring holding rates at 4.0%. Those members wanting a cut judged that disinflation was established while those preferring to hold Bank Rate argued that inflation risks remained sufficiently material to leave rates untouched at this stage.

- The Office for Budget Responsibility reported that the UK economy expanded by 0.1% in the third quarter of the calendar year, this was unrevised from the initial estimate. The most recent Monetary Policy Report (November) projected modest economic growth, with GDP expected to rise by 0.2% in the final calendar quarter of 2025. Annual growth is forecast to ease from 1.4% before improving again later, reflecting the delayed effects of lower interest rates, looser monetary conditions, stronger global activity, and higher consumer spending. The view of modest economic growth going forward was echoed by the Office for Budget Responsibility in its Economic and fiscal outlook published in line with the Autumn Statement which revised down its estimate of annual real GDP to around 1.5% on average between 2025 and 2030.

- CPI inflation was 3.2% in November 2025, down from 3.6% in the previous month and below the 3.5% expected but then increased to 3.4% in December. Core CPI eased to 3.2% from 3.4%, contrary to forecasts of remaining at 3.6%. Looking forward, the MPC continues to expect inflation to fall, to around 3% in calendar Q1 2026, before steadily returning to the 2% target by late 2026 or early 2027.

- The labour market continues to ease with rising unemployment, falling vacancies and flat inactivity. In the three months to October 2025, the unemployment rate increased to 5.1%, higher than the level previously expected by the BoE, while the employment rate slipped to 74.9%. Pay growth for the same period eased modestly, with total earnings (including bonuses) growth at 4.7% and while regular pay was 4.6%.

- The US Federal Reserve also continued to cut rates, including reducing the target range for the Federal Funds Rate by 0.25% at its December 2025 meeting, to 3.50%-3.75%, in line with expectations. The minutes of the meeting noted that most Fed policymakers judged that further rate cuts would be likely in 2026 if inflation continues to ease, however they were still divided in their assessment of the risks between inflation and unemployment.

92. In addition, the following are forecast future fiscal events that might impact the Council's medium-term financial planning.

- Despite an improved near -term outlook, the MPC is cautious about reducing interest rates further. It intends to wait for stronger evidence that the inflation is firmly under control, recognising that there is a possibility the rates may need to stay high or fall gradually due to the ongoing inflation risk.

- Medium and long-term gilt yields continue to include premia reflecting concerns over UK government credibility, global uncertainty, and the high volume planned issuance. As these are unlikely to be resolved quickly, yields are expected to remain higher for some time.

Reserves & Balances

Reserve Forecast

93. In accordance with statutory regulations and CIPFA guidance, the levels of balances and reserves are reviewed during the budget process to ensure that they are currently sufficient, and that they will remain adequate over the medium term.

94. The Council's historic & medium-term approach involves using reserves to support the budget position while savings are being realised. The in-year assumption is that £3.977m of reserves will be required to enable the Council to achieve a balanced budget.

95. The table below shows a summary of the reserves following a strategic review with the investment reserves to support the Council deliver future invest-to-save, regeneration & growth and transformation projects that will be required to deliver future budget proposals and close the budget gap of £21.155m.

96. There will be a continuing piece of work undertaken to identify of there are any uncommitted reserves. Any identified reserves would be repurposed to either increase the budget stabilisation reserve or to increase reserves for workforce transformation costs, regeneration & growth and invest to save projects.

GF RESERVES		Balance at 31 March 2025 £m	Actual Transfers (In) / Out 2025/26 £m	Forecast Transfers (In) / Out 2025/26 £m	Balance at 31 March 2026 £m	Forecast Transfers (In) / Out 2026/27 £m	Balance at 31 March 2027 £m	Forecast Transfers (In) / Out 2027/28 £m	Balance at 31 March 2028 £m	Forecast Transfers (In) / Out 2028/29 £m	Balance at 31 March 2029 £m
General Fund		**(£10.000)**	**£0.000**	**£0.000**	**(£10.000)**	**£0.000**	**(£10.000)**	**£0.000**	**(£10.000)**	**£0.000**	**(£10.000)**
Directorate Reserves		(£4.013)	£1.073	£0.692	(£2.248)	£0.788	(£1.460)	£0.000	(£1.460)	£0.000	(£1.460)
Corporate Reserves	Investment Reserves	(£2.816)	£0.000	£0.582	(£2.234)	£0.000	(£2.234)	£0.000	(£2.234)	£0.000	(£2.234)
Corporate Reserves	Risk Reserves	(£10.905)	£0.000	£2.000	(£8.905)	£4.000	(£4.905)	£0.000	(£4.905)	£0.000	(£4.905)
Corporate Reserves	Stabilisation Reserves	(£27.180)	(£3.316)	£12.607	(£17.889)	£3.997	(£13.892)	£13.898	£0.006	£21.155	£21.161
External Funding		(£8.701)	£2.482	£2.939	(£3.280)	£3.123	(£0.157)	£0.273	£0.116	£0.000	£0.116
Earmarked Balances Sub Total		**(£53.615)**	**£0.239**	**£18.820**	**(£34.556)**	**£11.908**	**(£22.648)**	**£14.171**	**(£8.477)**	**£21.155**	**£12.678**
Schools Reserves		(£2.972)	£0.000	£0.000	(£2.972)	£0.000	(£2.972)	£0.000	(£2.972)	£0.000	(£2.972)
Earmarked Reserves Total		**(£56.587)**	**£0.239**	**£18.820**	**(£37.528)**	**£11.908**	**(£25.620)**	**£14.171**	**(£11.449)**	**£21.155**	**£9.706**
GF RESERVES TOTAL		**(£66.587)**	**£0.239**	**£18.820**	**(£47.528)**	**£11.908**	**(£35.620)**	**£14.171**	**(£21.449)**	**£21.155**	**(£0.294)**

97. The table below shows an illustration of utilising reserves to fund the remaining budget gap for each of the three years 2026/27 (£3.977m), 2027/287 (£13.898m) & 2028/29 (£21.155m). There are currently insufficient levels of reserves over the medium-term if there are no further efficiencies or savings proposals brought forward. There also remains a risk around any potential unforeseen future events including in-year overspends that would have an adverse impact on the level of reserve balances.

Projected Balance of General Fund Reserves Balances	Balance at 31 March 2025 £m	Balance at 31 March 2026 £m	Balance at 31 March 2027 £m	Balance at 31 March 2028 £m	Balance at 31 March 2029 £m
Projected GF Reserves Balance	**(£66.587)**	**(£47.528)**	**(£35.620)**	**(£21.449)**	**(£0.294)**
General Fund	£10.000	£10.000	£10.000	£10.000	£10.000
Schools Reserves	£2.972	£2.972	£2.972	£2.972	£2.972
GF Reserves excl. Statute & Ring-Fenced	**(£53.615)**	**(£34.556)**	**(£22.648)**	**(£8.477)**	**£12.678**

98. To continue to reduce the dependence on reserves and address the structural funding shortfall, it is critical that further savings, efficiencies or income generation are identified over the three-year MTFS period 2026/27 to 2028/29 to stabilise the Council's finances over the medium-term.

Chief Finance Officer – Assurance Statement

99. Under S25 of the Local Government Act 2003 the S151 officer is required to produce a report for Members that comments on the robustness of the estimates and the adequacy of the reserves that the Council holds:

100. The assurance statement is attached in full as Appendix 6

101. In summary the Chief Finance Officer can give members assurance that the estimates contained within the budget are sufficiently robust and that an adequate level of reserves exist to meet known challenges and commitments.

102. As with most upper tier councils in the country there is considerable uncertainty over future finances given the growing demand for its services in some key areas and this is an area that will require continued focussed attention over the next few years. The Council has set up a strategic finance board with the responsibility of monitoring delivery of the in-year revenue budget and development of the medium-term financial strategy.

Budget Timeline & Workplan

Timelines

103. The current timelines for 2026/276 budget setting is shown in the table below:

Report	Committee Meeting	Date
2026-27 Budget Report	Budget Overview & Scrutiny Committee	11 February 2026
	Budget Cabinet	12 February 2026
	Budget Council	25 February 2026

Future Workplan

104. The work which has taken place over the last few months have reduced the 2026/27 budget gap from £7.547m in the December 2025 budget update to £3.977m currently. As part of the new governance arrangements put in place as part of the council's improvement plan, the S151 officer chairs the monthly finance board which has responsibility for monitoring the in-year revenue budget and updating the medium-term financial strategy, including the development of budget proposals for the 2027/28 budget with onward reporting to the Performance Digital and Transformation Board.

105. There will be a detailed budget timetable agreed setting out the approach, workstreams and timelines supporting production of proposals to address the structural funding gap to enable a balanced budget to be set without recourse to reserves over the current medium-term strategy which is framed over the three themes of:

1) **Internal Transformation:**

This includes the development of a workforce and digital strategy including looking at the scope for becoming more cost-effective and efficient in our service delivery models including opportunities for automation and process improvement with a good example being the transformation work linked to the upgrade of Unit 4 which has £1.300m of efficiency savings linked to it over the three-year period of 2026/27 to 2028/29. This will underpin and support the ongoing work on service reviews and the right-sizing of staffing budgets.

2) **Contain Growth / Demand Pressures:**

A significant proportion of the forecast funding gap is the result of ongoing increasing demand and the inflationary costs of meeting that demand, particularly Children's and Adults Social Care. Whilst these are national issues and pressures not unique to Bury, external investment has been commissioned across both Adults and Children's

social care to identify proposals that will help to reduce both demand and the cost of meeting that demand.

3) Income:

Further work will be undertaken to ensure that all current sales, fees and charges are reviewed to ensure they cover the full cost of service delivery, and new avenues of income generation are fully explored.

Links with the Corporate Priorities:

106. The links to the LET's Do It Strategy are included in the body of the report.

Equality Impact and Considerations:

107. In considering the budget for 2026/276 the Council must also consider its ongoing duties under the Equality Act 2010 to have due regard to the need to eliminate discrimination and advance equality of opportunity between all irrespective of whether they fall into a protected category such as race, gender, religion etc. Having due regard to these duties does not mean that the Council has an absolute obligation to eliminate discrimination but that it must consider how its decisions will contribute towards meeting the duties in light of all other relevant considerations such as economic and practical considerations.

108. Beyond the Council's legal obligations, the Authority has made a strategic commitment to inclusion as a key priority through both the LET'S Do It! Strategy and local Inclusion Strategy and defined Equality Objectives. The Council's commitment to inclusion extends beyond the nine legally protected characteristics and encompasses carers, Children Looked After and care leavers, military veterans and reservists and the socio-economically disadvantaged.

109. The policy savings proposals included in the 2026/27 budget will have a specific Equality Impact Assessment included when the fully developed proposal is presented to Cabinet and publicly consulted upon in the new financial year.

110. An overarching Equality Impact Analysis considering the budget as a whole, including the impact of the proposed raise in Council Tax, has been developed and is included within the appendices to this Budget Report.

111. The Equality Impact Analysis has highlighted likely negative impacts for residents with specific characteristics and circumstances. These impacts have been reduced through several factors including a favourable economic outlook in some circumstances, current and ongoing support, additional actions around communication, evolution of support systems and a commitment to protect the most vulnerable as much as possible. No statutory service provision will be affected by the proposals within the budget.

112. Although there may be some negative impacts arising from the budget proposals these impacts are expected to be low given the mitigating factors to reduce the impacts.

113. EIA is to be kept under review as the budget proposals are progressed

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Environmental Impact and Considerations:

114. The Council is working towards becoming a carbon neutral organisation by 2038. A number of the savings proposals will contribute to the reduction of the organisations carbon footprint including the reduction in the size of the estate.

Assessment and Mitigation of Risk:

115. The risks identified within this report are set out within the relevant sections above and included in the Chief Finance Officer statement.

Legal Implications:

Legal Implications

1. In accordance with the Local Government Finance Act 1992, as amended by the Localism Act 2011, the Council must set a balanced budget and Council Tax for the 2026/27 financial year by early March 2026.

2. The Council is required to determine Council Tax levels for each valuation band within the Council Tax area. The Council must make specific estimates of gross revenue expenditure and anticipated income to establish its Council Tax requirement. These estimates must be sufficient to ensure the Council can discharge its statutory functions, meet its legal and financial obligations, and deliver a balanced budget.

3. Under Section 25 of the Local Government Act 2003, the Council must have regard to the report of the Director of Finance (Section 151 Officer) on the robustness of budget estimates and the adequacy of proposed reserves when determining the budget requirement.

4. The Local Government Act 1999 requires the Council to secure continuous improvement in the exercise of its functions, having regard to economy, efficiency and effectiveness. Section 28 of the Local Government Act 2003 imposes a duty on the Council to closely monitor its financial position. If expenditure is likely to exceed available resources, the Director of Finance must formally report this to the Council.

5. Consultation has taken place regarding the budget proposals and outcomes are summarised within the body of this report. Proposals relating to Place directorate income relating to car parking, moving vehicle offences and EV cross pavement fees. is subject to detailed work by Officers and it is proposed that public consultation will take place on these proposals in line with the Council's duties, the outcomes of the consultation will be considered at a later stage by Cabinet.

6. Where a service is provided pursuant to a statutory duty, it would not be lawful to fail to discharge it properly or abandon it, and where there is discretion as to how it is to be discharged, that discretion should be exercised reasonably. The report sets out the relevant considerations for Members to consider during their deliberations and Members are reminded of the need to ignore irrelevant considerations. Members have a duty to seek to ensure that the Council acts lawfully. Members must not come to a decision which no reasonable authority could come to; balancing the nature, quality, and level of services which they consider should be provided, against the costs of providing such services to ensure the Council acts lawfully and proportionately when balancing service levels and associated costs.

7. The Council must have due regard to the Public Sector Equality Duty contained in the Equality Act 2010, which requires consideration of the need to eliminate discrimination and advance equality of opportunity. An Equality Impact Assessment accompanies this report. The duty applies both at the point of budget-setting and when Cabinet takes related operational decisions.

8. The Local Government Act 2003 and the Local Authorities (Capital Finance and Accounting) Regulations 2003 establish the framework governing capital expenditure and borrowing. The Council must determine and keep under review the amount it can afford to borrow and must have regard to the Prudential Code when setting and reviewing its affordable borrowing limits.

9. Under the Localism Act 2011, a Council Tax referendum must be held if the authority proposes an increase in the relevant basic amount of Council Tax that exceeds principles determined by the Secretary of State.

10. The Local Government & Housing Act 1989 establishes the statutory framework for the Housing Revenue Account. The Council must periodically review rents and ensure they broadly reflect the relationship to private market rents. The HRA must not fall into deficit and must operate within ring-fenced accounting rules. Further detail is set out in the accompanying HRA report.

11. Any proposal to make or increase charges must comply with the applicable statutory framework. Where reliance is placed on Section 93 of the Local Government Act 2003 (charging for discretionary services), charges must be set on a cost-recovery basis only. Under the Provision of Services Regulations 2009,

fees for authorisation-based activities (e.g., licences) must not exceed the cost of delivering those procedures and must be reasonable and proportionate.

12. Under Section 33(2) of the Localism Act 2011, the Monitoring Officer intends to grant dispensations to all Members to allow participation and voting on decisions relating to the setting of Council Tax or associated budget calculations.

13. Members should be aware of Section 106 of the Local Government Finance Act 1992. A Member who is in Council Tax arrears of at least two months must disclose this at the relevant meeting and must not vote on any budget or Council Tax decisions. Failure to comply constitutes a criminal offence unless the Member can show they were unaware that Section 106 applied. Members may speak on the matter but are prohibited from voting.

Financial Implications:

116. The financial implications are as outlined in the report

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Appendices:

Appendix	Description
1	Council Tax 2026/27 and Statutory Calculations
2	Treasury Management Strategy 2026/27
3	Capital Strategy 2026/27 – 2028/29
4	Dedicated Schools Grant 2026/27
5	Equality Impact Assessment
6	Chief Finance Officer Statement

Background papers:

117. 3 December 2025 Cabinet: Draft 2026/27 Revenue Budget.

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

Term	Meaning
MTFS	Medium Term Financial Strategy
LGFS	Local Government Finance Settlement
DSG	Dedicated Schools Grant
MRP	Minimum Revenue Provision
CSP	Core Spending Power
GDP	Gross Domestic Product
CPI	Consumer Price Inflation
MPC	Monetary Policy Committee
CIPFA	Chartered Institute of Public Finance & Accountancy

APPENDIX 1

APPENDIX 1		Feb-26		
2026/27 - 2028/29 Budget Proposals		2026/27 £m	2027/28 £m	2028/29 £m
Rapid Response Assessment software - Technological efficiencies	HAC	(£0.009)		
BEST - review charges	HAC	(£0.010)		
BEST - introduce card payments	HAC	(£0.003)		
Community Equipment - procurement review	HAC	(£0.020)		
Community Equipment - Reconfigure out of hours service	HAC	(£0.038)		
Telecare - target new customers	HAC	(£0.035)		
Telecare - tech first approach	HAC	(£0.030)		
Falcon & Griffin - review of rotas	HAC	(£0.015)		
Commissioned Services - review of client contribution limit for day services	HAC	(£0.253)		
IMPOWER review	HAC	(£0.667)	(£0.667)	(£0.667)
IMPOWER review	HAC	(£1.000)	(£1.000)	(£1.000)
Persona Supported living rate review	HAC	(£0.250)	(£0.250)	
Retender of Neighbourhood housing support contract	HAC	(£0.047)		
Reduction of Leisure council subsidy	HAC	(£0.125)	(£0.155)	(£0.220)
Live Well GM Delivery partner - funding for role	HAC	(£0.027)		
Live Well restructure	HAC	(£0.100)		
Victoria Family Centre delivery model review	CYP	(£0.050)	(£0.050)	
Support at home reduced demand	CYP	(£0.035)		
School Improvement Service - reduction due to academisation	CYP	(£0.100)		
Governance Support - full recovery from schools	CYP	(£0.109)		
Business Support Use of Magic Notes software	CYP	(£0.100)	(£0.100)	
CSE Team - small restructure	CYP	(£0.035)	(£0.015)	
Residential homes / CWD - step down of residential placements	CYP	(£1.000)		
Various Building costs	CYP	(£0.100)		
Temporary Accommodation demand reduction	CCS	(£0.377)		
Staffing changes - use of HPG funding	CCS	(£0.053)		
HR Staffing savings	CCS	(£0.075)		
Review of payroll transactional charges	CCS	(£0.050)		
FAIR - invest to save Fraud officer reduce expenditure leakage	CCS	(£0.050)		
Law & Democratic services - reduction in external agency staff	CCS	(£0.100)		
Law & Democratic services - burial service fees	CCS	(£0.040)		
Strategic Partnerships staffing reduction	CCS	(£0.050)		
Strategic Workforce review	CCS	(£2.000)		
Reduction in Third party spend	CCS	(£1.000)	(£1.000)	(£1.000)
Debt refinancing	CCS	(£0.500)		
Strategic Workforce review	CCS	(£1.000)		
Place Income Opportunities to be developed	PLA	£0	(£0.434)	
TOTAL DRAFT BUDGET PROPOSALS		**(£9.453)**	**(£3.671)**	**(£2.887)**

Appendix 1

Formal Council Tax Resolution the Council is asked to resolve as follows:

It is noted that the Council calculated the 2025/26 estimated (surplus)/deficit on the Collection Fund as (£3,924,409)

It is noted that the Council calculated the 2026/27 Council Tax Base for the whole Council area as 58,709.94 (Item T in the formula Section 31B of the Local Government Finance Act 1992, as amended (the 'Act').

It is recommended:

That the Council approve the Council Tax requirement for the Council's own purposes (excluding precepts) for 2026/27 as £124.224m;

That the Council agrees the calculation of the aggregate amounts for the year 2026/27 in accordance with sections 31 to 36 of the Act:

2026/27 Revenue Budget	
	£m
2025/26 Net Budget	£238.988
Budget Assumptions	£29.314
Budget Proposals	(£16.166)
NET BUDGET	**£252.135**
Funded By:	
Government Grants	£4.423
Business Rates	£115.765
Prior Year Collection Fund Surplus / (Deficit)	£3.746
Council Tax	£124.224
Planned Use of Reserves	£3.977
FUNDING	**£252.135**

In relation to Council Tax, Council is asked to:

- Raise the Bury element of the Council tax by 4.99% of which 2.99% relates to the general precept and 2.00% relates to the adult social care levy.
- Approve the council tax requirement for the council's own purposes (excluding precepts) as £124.224m

That the following amounts be calculated by the council for the year 2025/26 in accordance with Sections 31 to 36 of the Local Government Finance Act 1992:

£496,953,887 being the aggregate of the amounts which the council estimates for the items set out in Section 31A(2) of the Act; (This is the gross expenditure budget)

£372,729,525 being the aggregate of the amounts which the council estimates for the items set out in Section 31A 3 of the Act (The external income budgets including business rates and government grants)

£124,224,362 being the amount by which the aggregate at a) above exceeds the aggregate at b) above, calculated by the council in accordance with Section 31A (4) of the Act as its Council Tax requirement for the year. (Item R in the formula in Section 31B of the Ac).

(Net Council Tax Requirement for the budget)

£2,115.90 being the amount at c) above, (above item R) divided by Item T calculated by the Council, in accordance with section 31B of the Act, as the relevant basic amount of its Council Tax for the year, and:

Bury Council

2026/27 Council Tax By Band – Bury Council Element							
A	B	C	D	E	F	G	H
£1,410.60	£1,645.70	£1,880.80	£2,115.90	£2,586.10	£3,056.30	£3,526.50	£4,231.80

Being the amounts given by multiplying the amount set out at d) above by the number which, in the proportion set out in Section 5 (1) of the Act is applicable for dwellings listed in a particular valuation band divided by the number which in that proportion is applicable to dwellings listed in valuation Band D, calculated by the Council in accordance with Section 36(1) of the Act, as the amounts to be taken into account for the year in respect of categories of dwellings listed in different valuation bands.

Note that the Police and Crime Commissioner component of the Greater Manchester Mayoral budget and the Mayoral general budget have issued precepts to the council in accordance with section 40 of the Local Government Finance Act That the following precepts be calculated for 2026/27 in accordance with Sections 31 to 36 of the Act.

Police and Crime Commissioner

2026/27 Council Tax By Band – Police and Crime Commissioner							
A	**B**	**C**	**D**	**E**	**F**	**G**	**H**
£190.20	**£221.90**	**£253.60**	**£285.30**	**£348.70**	**£412.10**	**£475.50**	**£570.60**

General Mayoral - Fire and Rescue Service

2026/27 Council Tax By Band – General Mayoral - Fire and Rescue Service							
A	**B**	**C**	**D**	**E**	**F**	**G**	**H**
£102.63	**£119.74**	**£136.84**	**£153.95**	**£188.16**	**£222.37**	**£256.58**	**£307.90**

That the council, in accordance with sections 30 and 36 of the Local Government Finance Act 1992, hereby sets the aggregate amounts shown in the tables below as the amounts of Council Tax for 2026/27 for each part of its area and for each of the categories of dwellings.

Aggregate of Council Tax Requirements

2026/27 Council Tax By Band - Aggregate for all Precepting Authorities							
A	B	C	D	E	F	G	H
£1,703.43	£1,987.34	£2,271.24	£2,555.15	£3,122.96	£3,690.77	£4,258.58	£5,110.30

To determine whether the council's relevant basic amount of council tax for 2026/27 is excessive in accordance with the principles approved under the Localism Act 2011.

	2025/26	2026/27	%
Council Tax Base	58,697.86	58,709.94	4.99%
Council Tax Requirement	£118,295,558	£124,224,362	
Relevant Amount of Council Tax	£2,015.33	£2,115.90	

The total increase of **4.99%** is not excessive as it is **within** the **4.99%** referendum limit.

The Authority is therefore not subject to a referendum.

Other Funding

Government Grants:

Included within the budget are several government grants totalling £4.423m that are received for specific purposes. Any variations to the level of funding will be matched by an equivalent adjustment in the budget for the respective service.

Business Rates:

Business Rates totalling £115.765m to support the council's overall budget is itemised below. In the event the Business Rates funding is above or below this level, the variation will be managed by an adjustment to the Collection Fund Smoothing Reserve.

	2026/27 £m
Business Rates: Local Share	£57.738
Business Rates: Top Up	£37.553
Business Rates: Section 31 Grants	£20.246
Business Rates: Cost of Collection	£0.228
Business Rates: GMCA no detriment contribution	£0.000
Total	**£115.765**

2025/26 Collection Fund Surplus/Deficit

The overall 2025/26 estimated surplus/deficit on Collection Fund is a surplus of £0.986m, that consists of a £1.257m surplus for Council Tax and a £0.271m deficit for Business Rates.

Bury overall share of the surplus is £3.746m, that is split £0.774m surplus from Council Tax and £2.972m deficit from Business Rates.

2025/26 Surplus/(Deficit) on Collection Fund	Council Tax £m	NNDR £m	TOTAL £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)	(£49.803)	**(£168.098)**
Police and Crime Commissioner	(£15.866)		**(£15.866)**
General Mayoral - Fire and Rescue Service	(£7.569)	(£0.503)	**(£8.072)**
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	£0.285	£0.818	**£1.103**
(Increase)/Decrease in the Allowance for Impairment of Appeals		£0.103	**£0.103**
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	**(£142.704)**	**(£49.286)**	**(£191.989)**
2025-26 In-Year Surplus/(Deficit)	**£0.005**	**£3.235**	**£3.240**
Surplus/(Deficit) as at 31.12.2025	**£0.923**	**£3.002**	**£3.924**

Share of the 2025/26 Surplus/(Deficit)	Council Tax £m	NNDR £m	TOTAL £m
Bury MBC	£0.774	£2.972	**£3.746**
Police and Crime Commissioner	£0.103		**£0.103**
General Mayoral - Fire and Rescue Service	£0.046	£0.030	**£0.076**
Surplus/(Deficit) as at 31.03.2025	**£0.923**	**£3.002**	**£3.924**

2026/27 Council Tax Base Calculation

Calculation of Council Tax Base 2025/26 (Based on all properties)										
Bands	**A Reduced**	**A**	**B**	**C**	**D**	**E**	**F**	**G**	**H**	**TOTAL**
Total Number of Dwellings on the Valuation List		30,756.00	18,740.00	17,599.00	9,387.00	5,707.00	1,895.00	1,316.00	179.00	**85,579.00**
Total Number of Exempt and Disabled Relief Dwellings on the Valuation List	89.00	(953.00)	(316.00)	(362.00)	(185.00)	(108.00)	(32.00)	(37.00)	(20.00)	**(1,924.00)**
Less: Estimated Discounts, Exemptions and Disabled Relief	(6.75)	(3,804.50)	(1,703.00)	(1,305.50)	(575.25)	(267.75)	(82.25)	(63.25)	(5.50)	**(7,813.75)**
Total Equivalent Number of Dwellings after Discounts, Exemptions and Disabled Relief	**82.25**	**25,998.50**	**16,721.00**	**15,931.50**	**8,626.75**	**5,331.25**	**1,780.75**	**1,215.75**	**153.50**	**75,841.25**
Ratio to Band D (Factor Stipulated in Regulations)	**5/9**	**6/9**	**7/9**	**8/9**	**9/9**	**11/9**	**13/9**	**15/9**	**18/9**	
Band D Equivalent	**45.69**	**17,332.33**	**13,005.22**	**14,161.33**	**8,626.75**	**6,515.97**	**2,572.19**	**2,026.25**	**307.00**	**64,592.75**
Reduction in Taxbase as a Result of Local Council Tax Support Scheme (LCTSS)	(23.68)	(5,328.33)	(1,364.04)	(583.33)	(189.43)	(83.07)	(23.64)	(10.69)	(0.75)	**(7,606.96)**
Other Adjustments: Band D Equivalent Forecast New Dwellings & Base Movements					802.75					**802.75**
Band D Equivalent after LCTSS and Other Adjustments	**32.54**	**13,780.11**	**11,944.30**	**13,642.82**	**9,240.07**	**6,414.44**	**2,538.05**	**2,008.43**	**305.50**	**59,906.27**
Multiplied by Estimated Collection Rate										**98.00%**
Band D Equivalent of Contributions in Lieu (Class O Exempt Dwellings)					1.80					**1.80**
2025/26 BAND D EQUIVALENT COUNCIL TAX BASE										**58,709.94**

Note: 'A Reduced Band' are Band A properties that have disabled adaptations.

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Cabinet Report Sign Off Sheet

(Please speak with Chloe Ashworth in Democratic Services for any assistance)

Name of report: 2026-27 Treasury Management Strategy Report Author(s): Neil Kissock Date of Cabinet:

Initial Sign off

(We suggest these are completed prior to the draft report deadline)

Has the report been to Service DMT?	Yes ☒ Date: No ☒
Has the report been considered by SLG?	Yes ☒ Date: No ☒
Has the report been considered by other Board? (e.g., Regeneration Board)	Yes ☒ Date and Board: No ☒

Formal sign off

(Please note, no report will be issued without the following sign offs)

Reviewed by Cabinet Member	Date:

Reviewed by Executive Lead	Date:
Legal review	Date:
Finance review	Date:
S151 officer review	Date:
MO review	Date:

Classification:	Decision Type:
Open	Key

Report to:	Overview & Scrutiny: 10 February 2026 Cabinet: 11 February 2026 Council: 25 February 2026	**Date:**	
Subject:	2026-27 Treasury Management Strategy Report		
Report of	Cabinet Member for Finance and Communities		

Summary

1. Treasury management is the management of the Council's cash flows, borrowing and investments, and the associated risks. The Council has borrowed and invested substantial sums of money and is therefore exposed to financial risks including the loss of invested funds and the revenue effect of changing interest rates. The successful identification, monitoring and control of financial risk are therefore central to the Council's prudent financial management.

2. Treasury risk management at the Council is conducted within the framework of the Chartered Institute of Public Finance and Accountancy's Treasury Management in the Public Services: Code of Practice 2021 Edition (the CIPFA Code) which requires the Authority to approve a treasury management strategy before the start of each financial year. This report fulfils the Authority's legal obligation under the Local Government Act 2003 to have regard to the CIPFA Code.

Recommendation(s)

3. The Cabinet is requested to consider, comment as appropriate, on the proposed strategy for 2026/27, and is requested to endorse the recommendations outlined below, for approval by Council
   - The Treasury Management Strategy including the associated Prudential Indicators and Annual Investment Strategy.
   - The Treasury Management Policy Statement.
   - The Minimum Revenue Provision (MRP) Policy Statement.

4. Council is requested to agree at its meeting on 25 February 2026 the following:
   - To approve the Treasury Management Strategy including the associated Prudential Indicators and Annual Investment Strategy.
   - To approve the Treasury Management Policy Statement.
   - To approve the Minimum Revenue Provision (MRP) Policy Statement.

Reasons for recommendation(s)

5. As a requirement of Local Government Act 2003, the DLUHC investment guidance (2018), the DLUHC MRP guidance 2018, the 2021 CIPFA Treasury Management Code and the CIPFA Prudential Code.

Alternative options considered and rejected

6. Not applicable.

Report Author and Contact Details:

Name: Neil Kissock

Position: Director of Finance

Department: Corporate Core Finance

E-mail: N.Kissock@bury.gov.uk

Links with the Corporate Priorities:

Please summarise how this links to the Let's Do It Strategy.

7. A strong financially sustainable Council is essential to the Let's Do It Strategy.

Equality Impact and Considerations:

Please provide an explanation of the outcome(s) of an initial or full EIA. Intranet Arling Close to EIA documents is here.

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.

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.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
There are significant risks in the financial position both in the current and future financial years. Financial sustainability is critical and the report sets out the Council's plans to ensure sufficient funds are available for investment in the borough while maintaining a balanced budget over the medium-term planning period.	Regular monitoring and reporting ensures that any changes in the financial position are quickly identified and action can be taken to manage the overall position. The medium-term financial strategy takes account of any in-year changes in funding or demand and ensures the Council has a longer-term view of finances for future years.

Legal Implications:

8. The Treasury Management Strategy form part of the suite of budget reports which will be considered by Members, full legal implications are set out in the core report.

Financial Implications:

9. The financial implications are set out in the report.

Background papers:

2024/25 Treasury Outturn Report

Introduction

1. Treasury management is the management of the Council's cash flows, borrowing and investments, and the associated risks. The Council has borrowed and invested substantial sums of money and is therefore exposed to financial risks including the loss of invested funds and the revenue effect of changing interest rates. The successful

identification, monitoring and control of financial risk are therefore central to the Council's prudent financial management.

2. Treasury risk management is conducted within the framework of the Chartered Institute of Public Finance and Accountancy's Treasury Management in the Public Services: Code of Practice 2021 Edition (the CIPFA Code) which requires Council to approve a treasury management strategy before the start of each financial year. This report fulfils the Council's legal obligation under the Local Government Act 2003 to have regard to the CIPFA Code.

3. As per DLUHC guidance, investments held for service purposes or for commercial profit are considered separately within the Non-Treasury Investment Strategy section of this report.

4. In accordance with the guidance the Council is required to receive and approve, as a minimum, three main reports each year, which incorporate a variety of policies, estimates and actuals. This includes:
   - An Annual Management Treasury Strategy, covering the Prudential and Treasury Indicators.
   - A mid-year treasury management review.
   - An annual treasury outturn report.

External Context

Economic background:

5. The Chancellor of the Exchequer delivered her Autumn Budget at the end of October. Based on the plans announced the most significant impacts on the Authority's treasury management strategy for 2026/27 are expected to include the influence of the government's 2025 Autumn Budget, lower short-term interest rates alongside higher medium- and longer-term rates, slower economic growth, together with ongoing uncertainties around the global economy, stock market sentiment, and geopolitical issues.

6. The Bank rate was cut to 3.75% by the Bank of England's Monetary Policy Committee (MPC) in December 2025, as expected. The vote to cut was 5-4, with the minority instead favouring holding rates at 4.0%. Those members wanting a cut judged that disinflation was established while those preferring to hold Bank Rate argued that inflation risks remained sufficiently material to leave rates untouched at this stage.

7. CPI inflation was 3.2% in November 2025, down from 3.6% in the previous month and below the 3.5% expected. Core CPI eased to 3.2% from 3.4%, contrary to forecasts of remaining at 3.6%. Looking forward, the MPC continues to expect inflation to fall, to around 3% in calendar Q1 2026, before steadily returning to the 2% target by late 2026 or early 2027.

8. Risks to the growth and inflation outlook lie to the downside, which may ultimately deliver lower Bank Rate than our central case. However, the minutes suggest that the bar to further rate cuts beyond 3.25% is higher and the near-term upside risks to our Bank Rate forecast have increased. Having said that, we believe inflation expectations will naturally decline alongside headline inflation rates.

9. The labour market continues to ease with rising unemployment, falling vacancies and flat inactivity. In the three months to October 2025, the unemployment rate increased to 5.1%, higher than the level previously expected by the BoE, while the employment rate slipped to 74.9%. Pay growth for the same period eased modestly, with total earnings (including bonuses) growth at 4.7% and while regular pay was 4.6%.

10. The US Federal Reserve also continued to cut rates, including reducing the target range for the Federal Funds Rate by 0.25% at its December 2025 meeting, to 3.50%-3.75%, in line with expectations. The minutes of the meeting noted that most Fed policymakers judged that further rate cuts would be likely in 2026 if inflation continues to ease, however they were still divided in their assessment of the risks between inflation and unemployment.

11. The European Central Bank (ECB) kept its key interest rates unchanged in December for a fourth consecutive meeting, maintaining the deposit rate at 2.0% and the main refinancing rate at 2.15%. The ECB maintained that future policy decisions will remain data-dependent, that inflation is close to its 2% target and that the euro area economy continues to expand despite a challenging global environment, including heightened geopolitical risks and trade tensions.

Credit Update

12. Credit Default Swap (CDS) prices, which spiked in April 2025 following President Trump's 'Liberation Day' tariff announcements, have since trended lower, returning to levels broadly consistent with their 2024 averages. Although CDS prices rose modestly during October and November, the overall credit outlook remains stable, and credit conditions are expected to remain close to the range seen over the past two years.

13. While lower interest rates may weigh on banks' profitability, strong capital positions, easing inflation, steady economic growth, low unemployment, and reduced borrowing costs for households and businesses all support a favourable outlook for the creditworthiness of institutions on (the authority's treasury management advisor) Arlingclose's counterparty list. Arlingclose's advice on approved counterparties and

recommended investment durations is kept under continuous review and will continue to reflect prevailing economic and credit conditions.

Interest rate forecast (December 2025)

14. Arlingclose, the Authority's treasury management adviser, currently forecast that the Bank of England's Monetary Policy Committee will continue to reduce Bank Rate in 2026, reaching around 3.25% buy the middle of 2026. This forecast reflects amendments made following the Autumn Budget and an assessment of the fiscal measures and their market implications, and following the BoE MPC meeting held on the 18th of December.

15. Arlingclose expects long-term gilt yields, and therefore interest rates payable on long-term borrowing expected to remain broadly stable on average, though with continued volatility, and to end the forecast period marginally lower than current levels. Yields are likely to stay higher than in the pre-quantitative tightening era, reflecting ongoing balance sheet reduction and elevated bond issuance. Short-term fluctuations are expected to persist in response to economic data releases and geopolitical developments.

Local Context and Capital Prudential Indicators

16. On 31st March 2025 the Council's underlying need to borrow for capital purposes, as measured by the Capital Financing Requirement (CFR), was £402.572m, while balance sheet resources, which are the underlying resources available for investment, were £113.600m.

17. As of 31 March 2025, the Council had £295.266 million of external loan borrowing, and £20.700 million of internal investments.

18. Appendix B provides a more detailed breakdown of the treasury borrowing and investing position.

19. In setting a balanced budget the Council must calculate its budget requirement for each financial year and include the revenue costs that come from capital expenditure and financing decision. Under the Local Government Act 2003 and the Prudential Code the Council must consider what is affordable, prudent and sustainable.

20. The Council's capital expenditure plans are the key driver of treasury management activity. The output of the capital expenditure plans is reflected in prudential indicators, which are designed to assist members in their overview and consideration of capital expenditure plans both in terms of affordability and prudence. The key capital prudential indicators are shown below and are reported quarterly to Cabinet through the Performance Monitoring process.

Capital Expenditure and Financing:

21. The Council's current strategy is to maintain borrowing and investments below their underlying levels, sometimes known as internal borrowing. The Prudential Code recommends that total debt should be lower than its highest forecast CFR over the next three years. The table below shows that THE Council expects to comply with this recommendation during 2025/26. Forecast changes in these sums are also shown.

Balance Sheet Summary and Forecast	2024-25 Actual £m	2025-26 Estimate £m	2026-27 Forecast £m	2027-28 Forecast £m	2028-29 Forecast £m
Capital Financing Requirement	£402.572	£464.113	£494.652	£502.477	£511.995
Less: External Borrowing	(£295.266)	(£370.498)	(£404.835)	(£419.564)	(£436.624)
Less: Other Debt Liabilities	(£11.173)	(£9.957)	(£9.129)	(£8.258)	(£7.343)
Under/(Over) Borrowing	**£96.133**	**£83.658**	**£80.688**	**£74.655**	**£68.028**
Balance Sheet Resources	(£116.833)	(£103.558)	(£90.688)	(£84.655)	(£78.028)
Treasury Investments	£20.700	£19.900	£10.000	£10.000	£10.000
TOTAL	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£0.000**

22. Capital expenditure is where the Council spends money on assets, such as property or vehicles that will be used for more than one year. In local government this includes spending on assets owned by other bodies, and loans and grants to other bodies enabling them to buy assets. In 2026/27, the Budget set for planned capital expenditure is £106.212 million.

28. All capital expenditure must be financed, either from external sources (government grants and other contributions), the Council's own resources (revenue, reserves and capital receipts) or debt (including internal borrowing).

29. The table below summaries the capital expenditure and financing.

CAPITAL PROGRAMME 2024-25 to 2028-29	2024-25 Actual £m	2025-26 Estimate £m	2026-27 Forecast £m	2027-28 Forecast £m	2028-29 Forecast £m

Non-HRA	£43.511	£94.615	£78.951	£25.719	£11.000
HRA	£15.825	£25.000	£31.261	£23.056	£16.549
Policy/Non-Financial Investments	£0.498	£0.000	£0.000	£0.000	£0.000
Total Capital Expenditure	**£59.834**	**£119.615**	**£110.212**	**£48.775**	**£27.549**
Resourced By:					
External Funding	£33.240	£38.621	£48.589	£19.459	£2.500
Capital Receipts	£7.740	£5.714	£3.120	£1.260	£0.000
General Fund RCCO	£0.330	£0.089	£0.000	£0.000	£0.000
Housing Revenue Account DRF/MRR	£7.401	£8.988	£17.667	£14.692	£9.725
Total Resourced By	**£48.711**	**£53.412**	**£69.376**	**£35.411**	**£12.225**
Financing Requirement	**£11.123**	**£66.203**	**£40.835**	**£13.364**	**£15.324**

30. The Council's cumulative outstanding amount of debt finance is measured by the capital financing requirement (CFR). This increases with new debt-financed capital expenditure and reduces with MRP payments and capital receipts used to replace debt. Based on the above figures for expenditure and financing, the Council's estimated CFR is as follows.

Capital Financing Requirement (CFR)	**2024-25 Actual £m**	**2025-26 Estimate £m**	**2026-27 Forecast £m**	**2027-28 Forecast £m**	**2028-29 Forecast £m**
CFR - GF	£203.941	£256.449	£283.507	£283.871	£288.028
CFR - HRA	£121.414	£132.024	£142.498	£147.362	£154.186
CFR - Policy/Non-Financial Investments	£66.044	£65.683	£63.519	£62.986	£62.437
CFR - Other Debt Liabilities	£11.173	£9.958	£9.129	£8.258	£7.344
CFR Balance	**£402.572**	**£464.113**	**£498.652**	**£502.477**	**£511.995**
Movement in CFR	**£7.054**	**£61.541**	**£34.538**	**£7.825**	**£9.518**
Movement in CFR					
Financing Requirement	£11.124	£66.203	£40.835	£13.364	£15.324
Minimum Revenue Provision (MRP) / Loans Fund Repayments	(£3.232)	(£3.447)	(£5.468)	(£4.668)	(£4.891)
Voluntary Revenue Provision (VRP)	£0.000	£0.000	£0.000	£0.000	£0.000
Other Debt Liabilities Movements	(£0.838)	(£1.215)	(£0.829)	(£0.871)	(£0.915)
Movement in CFR	**£7.054**	**£61.541**	**£34.538**	**£7.825**	**£9.518**

31. Repayments of capital grants, loans and investments also generate capital receipts. The Council plans to receive £2.664million of capital receipts in 2025/26 and in the coming financial years as follows.

Capital receipts	**2024-25 Actual**	**2025-26 Estimate**	**2026-27 Forecast**	**2027-28 Forecast**	**2028-29 Forecast**

	£m	£m	£m	£m	£m
Asset sales	£2.482	£2.664	£3.035	£2.814	£2.160

32. Projected levels of the Council's total outstanding debt, compared with the CFR is shown below. Statutory guidance is that debt should remain below the CFR, except in the short-term. As can be seen from the table below, the Council expects to comply with this in the medium to longer term.

Actual External Debt against Capital Borrowing Need	**2024-25 Actual**	**2025-26 Estimate**	**2026-27 Forecast**	**2027-28 Forecast**	**2028-29 Forecast**
	£m	**£m**	**£m**	**£m**	**£m**
External Debt:					
Debt at 1 April	£295.266	£329.296	£368.000	£406.200	£421.300
Expected Change in Debt +/-		£41.202	£36.835	£13.364	£15.324
Actual Gross Debt at 31 March	**£295.266**	**£370.498**	**£404.835**	**£419.564**	**£436.624**
Capital Financing Requirement (CFR)	£391.399	£454.156	£485.523	£494.219	£504.651
Under/(Over) Borrowing	**£96.133**	**£83.658**	**£80.688**	**£74.655**	**£68.027**
Other Debt Liabilities	£12.011	£11.173	£9.957	£9.129	£8.258
Expected Change in Other Debt Liabilities +/-	(£0.838)	(£1.215)	(£0.829)	(£0.871)	(£0.915)
Other Debt Liabilities Total	**£11.173**	**£9.957**	**£9.129**	**£8.258**	**£7.343**

33. Although capital expenditure is not charged directly to the revenue budget, interest payable on loans and MRP payments are charged to revenue. The net annual charge is known as financing costs; this is compared to the net revenue stream i.e. The amount funded from Council Tax, business rates and general government grants. This indicator identifies the trend in the cost of capital (borrowing and other long-term obligation costs net of investment income) against the net revenue stream.

Ratio of Financing Costs to Net Revenue Stream	**2024-25 Actual £m**	**2025-26 Estimate £m**	**2026-27 Forecast £m**	**2027-28 Forecast £m**	**2028-29 Forecast £m**
GF	2.79%	3.97%	5.78%	5.43%	5.53%
HRA	10.48%	9.06%	11.58%	12.99%	13.16%

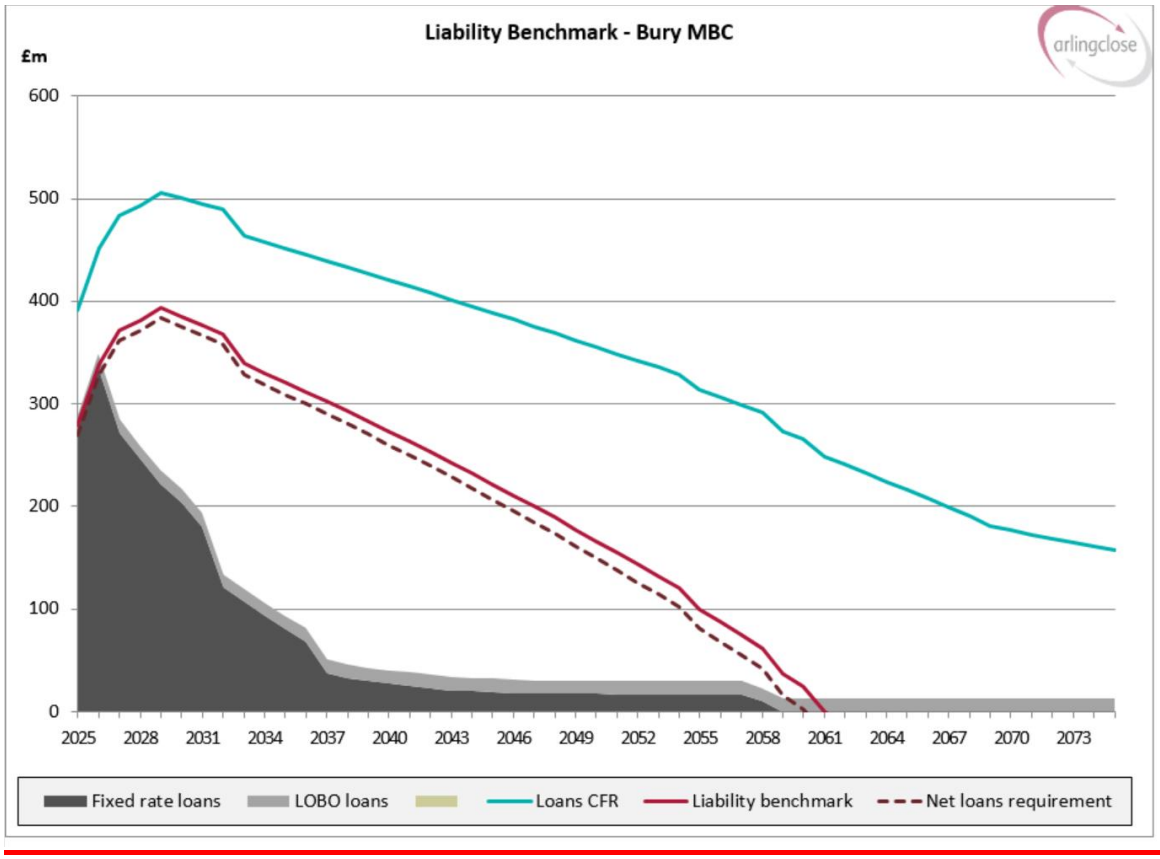
Liability benchmark

34. The Liability Benchmark is now a mandatory indicator that must be reviewed and presented as required under the Prudential Code. It compares actual borrowing against a benchmark, which is calculated showing the lowest level of borrowing required to keep

investments at a minimum level. The result then represents the minimum amount of borrowing an authority must undertake to fund their capital expenditure.

35. The benchmark is an important tool to help establish whether the Council is likely to be a long-term borrower or long-term investor in the future, and so shape its strategic focus and decision making. The liability benchmark itself represents an estimate of the cumulative amount of external borrowing the Council must hold to fund its current capital and revenue plans while keeping treasury investments at the minimum level required to manage day-to-day cash flow.

36. The benchmark calculated for the Council is shown graphically below. Based on latest information, it shows that the CFR repays debt before it needs to. If the Council had no additional investment balances / surplus cash during 2025/26, no additional borrowing would be required to support the capital programme as investment balances are sufficiently high. MRP could be revised to lengthen the loans CFR position, and this will be explored to determine whether it offers an opportunity to reduce revenue costs.



37. The graphical results are not unexpected as the Council expects to remain borrowed above its liability benchmark in the medium term. This is because there is a substantial historic debt portfolio. Over the past few years there have been no opportunities to mature debt early due to the premiums that would be incurred on the early repayment

of this debt. Due to the rapidly changing interest rate environment this position has now changed and the Council is seeing opportunities to mature debt in a discounted position.

38. Despite having an increasing need to borrow as defined by the Loans CFR, the Council can manage the borrowing requirement using existing balance sheet resources (balances, reserves, cash flow surpluses). Therefore, the Council will continue to hold any new debt requirements internally. This new debt would only be externalised if it becomes uneconomical to hold it internally.

Borrowing Strategy

39. Due to decisions taken in the past, the Council is currently projected to have £370.498m borrowing as at the end of March 2026 at an average interest rate of 4.45% and £10.000m treasury investments at an average rate of 4%, projected as at the end of March 2026.

40. The total borrowing requirement at the end of 2025/26 is forecast to be £454.156m (equivalent to the loans CFR). The Council's aim is to both repay maturing debt, and where possible some of the existing debt when opportunities to do this arise. The Council also considers new borrowing where it can be shown to be prudent and financial beneficial to do so. In 2025/26 £26.500m maturing external debt was repaid. £10.000m is current forecast to be repaid in 2025/26, which are maturing market loans.

41. The Council's chief objective when borrowing money is to strike an appropriately low risk balance between securing low interest costs and achieving cost certainty over the period for which funds are required.

42. Given the significant cuts to public expenditure and to local government funding, the Council's borrowing strategy continues to address the key issue of affordability without compromising the longer-term stability of the debt portfolio. Due to a rapidly changing interest rate environment the cost of borrowing has increased. If the Council needed to borrow it would be more cost effective in the short-term to borrow short-term.

43. The Council is still able to reduce net borrowing costs (despite foregone income) and reduce overall treasury risk, despite a highly different interest rate environment to this time last year. The benefits of internal borrowing will continue to be monitored regularly, and opportunities for restructuring or repaying debt at a discount will continue to be explored. Arlingclose will continue to assist the Council with this analysis, and identification of discount opportunities.

44. The Council may borrow short-term loans to cover unexpected cash flow shortages.

Limits to Borrowing Activity

45. The Council is legally obliged to set an affordable borrowing limit (also termed the authorised limit for external debt) each year and to keep it under review. In line with

statutory guidance, a lower "operational boundary" is also set as a warning level should debt approach the limit. It is calculated with regard to the Council's capital expenditure and financing plans.

Operational Boundary	2024-25 Actual £m	2025-26 Estimate £m	2026-27 Forecast £m	2027-28 Forecast £m	2028-29 Forecast £m
Borrowing	£391.401	£454.156	£485.523	£494.219	£504.651
Other Long-term Liabilities	£11.173	£9.958	£9.129	£8.258	£7.344
Total	**£402.572**	**£464.113**	**£494.652**	**£502.477**	**£511.995**

Authorised Limit	2024-25 Actual £m	2025-26 Estimate £m	2026-27 Forecast £m	2027-28 Forecast £m	2028-29 Forecast £m
Borrowing	£401.399	£464.156	£495.523	£504.218	£514.651
Other Long-term Liabilities	£12.173	£10.958	£10.129	£9.258	£8.344
Total	**£413.572**	**£475.113**	**£505.652**	**£513.477**	**£522.995**

Sources of Borrowing and Portfolio Implications

46. The approved sources of long-term and short-term borrowing are:
    - HM Treasury's Public Works Loan Board (PWLB) lending facility.
    - UK Infrastructure Bank Ltd
    - UK local authorities and any other UK public sector body
    - any institution approved for investments (see below)
    - any other bank or building society authorised to operate in the UK
    - UK public and private sector pension funds
    - capital market bond investors
    - retail investors via a regulated peer-to-peer platform
    - UK Municipal Bonds Agency plc and other special purpose companies created to enable local Council bond issues

47. Capital finance may also be raised by the following methods that are not borrowing, but may be classed as other debt liabilities:
    - leasing
    - hire purchase
    - Private Finance Initiative
    - sale and leaseback
    - similar asset-based finance.

48. The Council continues to investigate other sources of finance, such as local Council loans, the UK Municipal Bonds Agency and bank loans, that may be available at more favourable rates. The UK Municipal Bonds Agency is a more complicated source of

finance so any decision to borrow from this source will be the subject of a separate report to Audit and Governance Committee.

49. The Council holds two £13.000 million of Lender's Option Borrower's Option (LOBO) loans where the lender has the option to propose an increase in the interest rate as set dates, following which the Council has the option to either accept the new rate or to repay the loan at no additional cost. Both LOBO's have options during 2026/27 with a 56.40% probability of one of lenders exercising their option in April 2026. If they do, the Council will take the option to repay LOBO loans to reduce refinancing risk in later years.

50. Short-term and variable rate loans leave GCC exposed to the risk of short-term interest rate rises and are therefore subject to interest rate exposure limits in the treasury management indicators below.

Debt Rescheduling

51. PWLB allows authorities to repay loans before maturity and either pay a premium or receive a discount according to a set formula based on current interest rates. Some bank lenders may also be prepared to negotiate premature redemption terms. Due to cashflow implications some loans matured may be replaced with new loans, or they may be repaid without replacement, particularly where this is expected to lead to an overall saving or reduction in risk.

52. The Authority has undertaken the rescheduling of a number of PWLB loans following advice from our Treasury Adviser Arlingclose. This strategy has enabled the Authority to take advantage of discounts available for early repayments of selected loans. Replacement loans were then taken out where appropriate. This approach has resulted in an overall improvement in the Authority's borrowing position and reflected in the current portfolio and summarised in the table Appendix B.

53. The Council will continue to monitor its Loans and take advantage of any future debt restructuring opportunities where this is expected to benefit the authority financially or reduce risk.

54. Borrowing and rescheduling activity will be reported to the Audit and Governance Committee in the Annual Treasury Management Report, the Mid Year Report and any other treasury management reports presented to the relevant Committee.

Treasury Investment Strategy

55. During 2025/26 the Council's internal treasury investment balance has ranged between £20.000 million and £11.456 million. Balances are lower than prior years due to internal borrowing levels. Balances are expected to fall further as borrowing held internally increases.

56. The CIPFA Code requires the Council to invest its treasury funds prudently, and to have regard to the security and liquidity of its investments before seeking the highest rate of return, or yield. The Council's objective when investing money is to strike an appropriate balance between risk and return, minimising the risk of incurring losses from defaults and the risk receiving unsuitably low investment income. The Council aims to be a responsible investor and will consider environmental, social and governance (ESG) issues when investing.

57. Market conditions have changed rapidly during 2025/26 with interest a reduction to rates from 4% to 3.75% in December 2025. The Council has predominantly invested with High Street banks, Debt Management Office (DMO) and where opportunities arose for higher rates has invested in short term MMF's.

58. Under the IFRS 9 standard, the accounting for certain investments depends on the Council's "business model" for managing them. The Council aims to achieve value from its internally managed treasury investments by a business model of collecting the contractual cash flows and therefore, where other criteria are also met, these investments will continue to be accounted for at amortised cost.

59. The Council may invest its surplus funds with any of the counterparty types in table 2 below, subject to the cash limits (per counterparty), the time limits shown and the Responsible Investment Policy incorporated as part of the Treasury Management Policies.

Table 2: Approved Investment Counterparties

58. Table 2 should be read in conjunction with the notes below:

Counterparty	Credit Rating	Max £ limit per institution	Maximum Maturity Period
UK Government	Any	Unlimited	50 years
UK Local Authorities & Other Government Entities – except Local Authorities subject to a Section 114 notice	Any	£20m	2 years
Secured Investments	A- Or equivalent	£20m	1 year
UK Banks (Unsecured) *	A- Or equivalent	£25m	1 year
UK Building Societies (Unsecured) *	A- Or equivalent	£20m	1 year
Registered Providers (Unsecured) *	A- Or equivalent	£20m	1 year
Money Market Funds	A- Or equivalent	£20m	Instant Access
Unrated Affiliated Bodies working capital **	N/A	Subject individual circumstance	Case by Case
Unrated Affiliated Bodies Capital Expenditure Loan **	N/A	Subject individual circumstance	Case by Case

- **Credit Rating:**
  Investment limits are set by reference to the lowest published long-term credit rating from a selection of external rating agencies. Where available, the credit rating relevant to the specific investment or class of investment is used, otherwise the counterparty credit rating is used. However, investment decisions are never made solely based on credit ratings, and all other relevant factors including external advice will be taken into account.

- **Government:**
  Loans, bonds and bills issued or guaranteed by national governments, regional and local authorities and multilateral development banks. These investments are not subject to bail-in, and there is generally a lower risk of insolvency, although they are not zero risk. Investments with the UK Central Government may be made in unlimited amounts for up to 50 years.

- **Local Authorities and Other Government Entities:**
  Loans to, and bonds and bills issued or guaranteed by, other national governments, regional and local authorities and multilateral development banks. These investments are not subject to bail-in, and there is generally a lower risk of insolvency, although they are not zero risk.

- **Banks and Building Societies Unsecured:**
  Accounts, deposits, certificates of deposit and senior unsecured bonds with banks and building societies, other than multilateral development banks. These investments are subject to the risk of credit loss via a bail-in should the regulator determine that the bank is failing or likely to fail.

- **Registered Providers (unsecured)**:
  Loans and bonds issued by, guaranteed by or secured on the assets of registered providers of social housing and registered social landlords, formerly known as housing associations. These bodies are regulated by the Regulator of Social Housing (in England). As providers of public services, they retain the likelihood of receiving government support if needed.

- **Money market funds:**
  Pooled funds that offer same-day or short notice liquidity and very low or no price volatility by investing in short-term money markets. They have the advantage over bank accounts of providing wide diversification of investment risks, coupled with the services of a professional fund manager in return for a small fee. Although no sector limit applies to money market funds, the Council will take care to diversify its liquid investments over a variety of providers to ensure access to cash at all times.

- **Strategic Pooled Funds:**
  Bond, equity and property funds offer enhanced returns over the longer term but are more volatile in the short term. These allow the Council to diversify into asset classes other than cash without the need to own and manage the underlying investments. Because these funds have no defined maturity date, but are available for withdrawal after a notice period, their performance and continued suitability in meeting the Council's

investment objectives will be monitored regularly. These accounts are treated as long term investments due to the variability of the capital value of the investment and will be held for a period of at least 5 years. Any new funds opened will need to be mindful of the Concil's policies around fossil fuel, climate change and sustainable resources.

- **Real estate investment trusts:**
  Shares in companies that invest mainly in real estate and pay the majority of their rental income to investors in a similar manner to pooled property funds. As with property funds, REITs offer enhanced returns over the longer term, but are more volatile especially as the share price reflects changing demand for the shares as well as changes in the value of the underlying properties. Investments in REIT shares cannot be withdrawn but can be sold on the stock market to another investor.

- **Other investments:**
  This category covers treasury investments not listed above, for example unsecured corporate bonds and company loans. Non-bank companies cannot be bailed-in but can become insolvent placing the Council's investment at risk.

- **Operational bank accounts:**
  The Council may incur operational exposures, for example though current accounts, and merchant acquiring services, to any UK bank with credit ratings no lower than BBB- and with assets greater than £25 billion. These are not classed as investments but are still subject to the risk of a bank bail-in, and balances will therefore be kept to a minimum. The Bank of England has stated that in the event of failure, banks with assets greater than £25 billion are more likely to be bailed-in than made insolvent, increasing the chance of the Council maintaining operational continuity.

Responsible Investment Policy, Environmental, Social and Governance Considerations (ESG)

59. The Code requires local authorities to consider their counterparty policies in light of ESG information, while recognising that there is not a developed approach to ESG for public sector organisations and not expecting authorities to use real-time ESG scoring / criteria for individual investments.

60. ESG issues are wide-ranging and non-standardised, however the Council aims to be a responsible investor and will consider ESG issues when investing. The Council has a Climate Action Change Strategy and Plan, and more details can be found at the link below:

    Bury's Climate Action Strategy and Action Plan - Bury Council

Risk assessment and credit ratings:

61. Credit ratings are obtained and monitored by the Council's treasury advisers, who will notify changes in ratings as they occur. The credit rating agencies in current use are

listed in the Treasury Management Practices document. Where an entity has its credit rating downgraded so that it fails to meet the approved investment criteria then:

- no new investments will be made,
- any existing investments that can be recalled or sold at no cost will be,
- full consideration will be given to the recall or sale of all other existing investments with the affected counterparty.

62. Where a credit rating agency announces that a credit rating is on review for possible downgrade (also known as "negative watch") so that it may fall below the approved rating criteria, then only investments that can be withdrawn will be made with that organisation until the outcome of the review is announced. This policy will not apply to negative outlooks, which indicate a long-term direction of travel rather than an imminent change of rating.

Other information on the security of investments:

63. The Council understands that credit ratings are good, but not perfect, predictors of investment default. Full regard will therefore be given to other available information on the credit quality of the organisations in which it invests, including credit default swap prices, financial statements, information on potential government support, reports in the quality financial press and analysis and advice from the Council's treasury management adviser. No investments will be made with an organisation if there are substantive doubts about its credit quality, even though it may otherwise meet the above criteria.

64. Reputational aspects: The Council is aware that investment with certain counterparties, while considered secure from a purely financial perspective, may leave it open to criticism, valid or otherwise, that may affect its public reputation, and this risk will therefore be taken into account when making investment decisions.

65. When deteriorating financial market conditions affect the creditworthiness of all organisations, as happened in 2008, 2020 and 2022, this is not generally reflected in credit ratings but can be seen in other market measures. In these circumstances, the Council will restrict its investments to those organisations of higher credit quality and reduce the maximum duration of its investments to maintain the required level of security. The extent of these restrictions will be in line with prevailing financial market conditions. If these restrictions mean that insufficient commercial organisations of high credit quality are available to invest the Council's cash balances, then the surplus will be deposited with the UK Government or with other local authorities. This will cause a reduction in the level of investment income earned but will protect the principal sum invested.

Investment Limits

66. The Council holds general revenue reserves which would be available to cover investment losses. However, to limit this risk, in the case of a single default, the maximum that will be lent to any one organisation (other than the UK Government) will be £25.0 million. Limits will also be placed on fund managers, investments in brokers' nominee accounts, foreign countries, and industry sectors as below. Investments in

pooled funds and multilateral development banks do not count against the limit for any single foreign country, since the risk is diversified over many countries.

Liquidity management:

67. The Council uses cash flow forecasting to determine the maximum period for which funds may prudently be committed. The forecast is compiled on a prudent basis to minimise the risk of the Council being forced to borrow on unfavourable terms to meet its financial commitments. Limits on long-term investments are set by reference to the Council's medium-term financial plan and cash flow forecast.

68. The Council will spread its liquid cash over at least two providers (e.g. bank accounts and money market funds) to ensure that access to cash is maintained in the event of operational difficulties at any one provider.

Treasury Management Indicators

69. The Council measures and manages its exposures to treasury management risks using the following indicators.

70. **Security**: GCC has adopted a voluntary measure of its exposure to credit risk by monitoring the value-weighted average credit rating of its investment portfolio. This is calculated by applying a score to each investment (AAA=1, AA+=2, etc.) and taking the arithmetic average, weighted by the size of each investment. Unrated investments are assigned a score based on their perceived risk.

    Credit Risk Indicator: portfolio average credit rating target A

71. **Liquidity**: The Authority has adopted a voluntary measure of its exposure to liquidity risk by monitoring the amount of cash available to meet unexpected payments within a rolling three-month period, without additional borrowing.

    Liquidity Risk Indicator: total cash available within 1 month target £10m

72. **Maturity structure of borrowing**: This indicator is set to control the Council's exposure to refinancing risk. The upper and lower limits on the maturity structure of borrowing will be:

Refinancing rate risk indicator	Upper limit	Lower limit
Under 12 months	30%	0%
12 months and within 24 months	20%	0%
24 months and within 5 years	20%	0%
5 years and within 10 years	50%	0%
10 years and within 20 years	40%	0%
20 years and within 30 years	40%	0%
30 years and within 40 years	50%	0%
Over 40 years	40%	0%

73. Time periods start on the first day of each financial year. The maturity date of borrowing is the earliest date on which the lender can demand repayment.

Service Investments:

74. The definition of investments in the Treasury Management Code now covers all the financial assets of the Authority as well as the other non – financial assets which the Council holds primarily for financial returns. Investments that do not meet the definition of treasury management investments (i.e. management of surplus cash) are categorised as either for service purposes (made explicitly to further service objectives) and or for commercial purposes (made primarily for financial return).

75. Investment Guidance issued by the Ministry of Housing, Communities and Local Government (MHCLG) and Welsh Government also includes within the definition of investments all such assets help partially or wholly for financial return.

76. The Authority also held such investments in:

Non-Financial Investments	**2024/25**	**2025/26**
	£m	**£m**
Manchester Airport Loan	£29.366	£29.366
Bury MBC Townside Fields Loan	£7.257	£7.257
Six Town Housing Loan	£2.797	£2.664
Bury Bruntwood (Millgate) LLP Loan	£20.099	£20.099
The Prestwich Regeneration (LLP) Loan	£1.127	£1.127
Debt Managed for Probation Services	£0.011	£0.010
Total	**£60.657**	**£60.523**

77. These investments are forecast to generate £4.4m of investment Income in 2025/26 for the Authority after taking account of direct costs, representing a rate of return of 6.68%.

Service Investments: Shares

78. The Council has a 3.22% shareholding (three) shares in Manchester Airport Holdings Limited (MAHL). The nominal and fair value of Bury Council's interest in the company at 31 March 2025 are shown below:

Investments in Equity Instruments Designated at Fair Value through Other Comprehensive Income	**Nominal** **£m**	**Fair Value** **£m**	**Change in Fair Value during 2024/25 £000s**
Manchester Airport Shares	£10.214	£43.420	(£2.880)

Manchester Airport Car Park (1) Limited	£5.610	£4.400	£0
Total	**£15.824**	**£47.820**	**(£2,880)**

Related Matters

79. The CIPFA Code requires GCC to include the following in its treasury management strategy.

Financial Derivatives

80. The CIPFA Code requires authorities to clearly detail their policy on the use of derivatives in the annual strategy.

81. Local authorities have previously made use of financial derivatives embedded into loans and investments both to reduce interest rate risk (e.g. interest rate collars and forward deals) and to reduce costs or increase income at the expense of greater risk (e.g. LOBO loans and callable deposits). The general power of competence in Section 1 of the Localism Act 2011 removes much of the uncertainty over local authorities' use of standalone financial derivatives (i.e. those that are not embedded into a loan or investment).

82. The Council will only use standalone financial derivatives (such as swaps, forwards, futures and options) where they can be clearly demonstrated to reduce the overall level of the financial risks that the Council is exposed to. Additional risks presented, such as credit exposure to derivative counterparties, will be considered when determining the overall level of risk. Embedded derivatives, including those present in pooled funds and forward starting transactions, will not be subject to this policy, although the risks they present will be managed in line with the overall treasury risk management strategy.

83. Financial derivative transactions may be arranged with any organisation that meets the approved investment criteria assessed using the appropriate credit rating for derivative exposures. An allowance for credit risk calculated using the methodology in the Treasury Management Practices document will count against the counterparty credit limit and the relevant foreign country limit.

84. In line with the CIPFA Code, the Council will seek external advice and will consider that advice before entering financial derivatives to ensure that it fully understands the implications.

85. Housing Revenue Account: On 1 April 2012, the Authority notionally split each of its existing long-term loans into General Fund and HRA pools. In the future, new long-term loans borrowed will be assigned in their entirety to one pool or the other. Interest payable and other costs/income arising from long-term loans (e.g. premiums and discounts on early redemption) will be charged/ credited to the respective revenue account.

86. Where the value of the HRA loans pool is below the HRA capital financing requirement, interest on this "under-borrowing" will be charged to the HRA at the Authority's average rate of borrowing. Interest on any "over-borrowing" above the HRA capital financing requirement, and on balances in the HRA, its earmarked reserves and the major repairs reserve will be credited to the HRA at the Authority's average interest rate on treasury investments excluding strategic pooled funds and REITS, adjusted for credit risk.

Financial Implications

87. The budget for investment income in 2026/27 is £0.346m. The budget for debt interest paid in 2026/27 is £17.293m. If the actual levels of investments and borrowing, or actual interest rates, differ from the forecast, performance against budget will be correspondingly different. Split into General Fund and HRA budgets if applicable.

88. The Council has opted up to professional client status with some of its providers of financial services, including advisers, banks, brokers and fund managers, allowing it access to a greater range of services but without the greater regulatory protections afforded to individuals and small companies. Given the size and range of the Council's treasury management activities, this is the most appropriate status.

Other Options Considered

89. The CIPFA Code does not prescribe any particular treasury management strategy for local authorities to adopt. The Director of Finance believes that the above strategy represents an appropriate balance between risk management and cost effectiveness. Some alternative strategies, with their financial and risk management implications, are listed below.

Alternative	Impact on income and expenditure	Impact on risk management
Invest in a narrower range of counterparties and/or for shorter times	Interest income will be lower	Lower chance of losses from credit related defaults, but any such losses may be greater
Invest in a wider range of counterparties and/or for longer times	Interest income will be higher	Increased risk of losses from credit related defaults, but any such losses may be smaller

Borrow additional sums at long-term fixed interest rates	Debt interest costs will rise; this is unlikely to be offset by higher investment income	Higher investment balance leading to a higher impact in the event of a default; however long-term interest costs may be more certain
Borrow short-term or variable loans instead of long-term fixed rates	Debt interest costs will initially be lower	Increases in debt interest costs will be broadly offset by rising investment income in the medium term, but long-term costs may be less certain
Reduce level of borrowing	Saving on debt interest is likely to exceed lost investment income	Reduced investment balance leading to a lower impact in the event of a default; however long-term interest costs may be less certain

Treasury Management Policy Statement

90. The Council defines the policies and objectives of its treasury management activities as follows:
    - The council defines in the treasury management activities as the management of the Council's cash flow, its banking, money market and capital market transaction, the effective control of the risks associated with activities and pursuit of optimum performance consistent with those risks.
    - The Council regards the successful identification, monitoring and control of risk to be the prime criteria by which the effectiveness of its treasury management activities will be measure. Accordingly, the analysis and reporting of treasury management activities will focus on their risk implications
    - The Council acknowledges the effective treasury management will provide support towards the achievement of its business and service objectives. It is therefore committed to the principles of achieving best value in treasury management and to employing suitable performance measurement techniques, within the context of effective risk management.

91. The Council's Treasury Management Scheme of Delegation is approved by Full Council annually as part of the overall Treasury Management Strategy, it was last approved by Council at its meeting of February 2024 and there are no proposals for any amendments to the current scheme, which is set out below:

1. Delegation and Responsibility

The following personnel are involved on a regular basis in Treasury Management:

Director of Finance (S151 Officer)	Overall supervision of Treasury Management function and cash flow. Regular reviews of Treasury Management Strategy and monitor performance.
Accountancy Manager (Treasury & Capital)	Manage and undertake day to day Treasury Management Activities in accordance with Treasury Strategy and Policy Statement.
Accountant (Treasury & Capital)	Deputise for Accountancy Manager in their duties as required.

2. Treasury Management Scheme of Delegation

Full Council

- Receiving and reviewing reports on treasury management policies, practices and activities.
- Approval of/amendments to the Council's adopted clauses, treasury management policy statement; and
- Approval of annual strategy

Boards/Committees/Council/Responsible Body

- approval of/amendments to the organisation's adopted clauses, treasury management policy statement and treasury management practices.
- budget consideration and approval.
- approval of the division of responsibilities.
- receiving and reviewing regular monitoring reports and acting on recommendations.
- approving the selection of external service providers and agreeing terms of appointment.

Body/Person(s) with Responsibility for Scrutiny

- reviewing the treasury management policy and procedures and making recommendations to the body responsible.

3. The Treasury Management Role of the Director of Finance (Section 151 Officer)

- recommending clauses, treasury management policy/practices for approval, reviewing the same regularly, and monitoring compliance.
- submitting regular treasury management policy reports.
- submitting budgets and budget variations.
- receiving and reviewing management information reports.
- reviewing the performance of the treasury management function.
- ensuring the adequacy of treasury management resources and skills, and the effective division of responsibilities within the treasury management function.
- ensuring the adequacy of internal audit and liaising with external audit.
- recommending the appointment of external service providers.

Functions:

- preparation of a capital strategy to include capital expenditure, capital financing, non-financial investments and treasury management, with a long-term timeframe
- ensuring that the capital strategy is prudent, sustainable, affordable and prudent in the long term and provides value for money
- ensuring that due diligence has been carried out on all treasury and non-financial investments and is in accordance with the risk appetite of the authority
- ensure that the authority has appropriate legal powers to undertake expenditure on non-financial assets and their financing
- ensuring the proportionality of all investments so that the authority does not undertake a level of investment which exposes the authority to an excessive level of risk compared to its financial resources
- ensuring that an adequate governance process is in place for the approval, monitoring and ongoing risk management of all non-financial investments and long-term liabilities
- provision to members of a schedule of all non-treasury investments including material investments in subsidiaries, joint ventures, loans and financial guarantees
- ensuring that members are adequately informed and understand the risk exposures taken on by an authority
- ensuring that the authority has adequate expertise, either in-house or externally provided, to carry out the above
- creation of Treasury Management Practices which specifically deal with how non treasury investments will be carried out and managed, to include the following (TM Code p54): -
    - Risk management (TMP1 and schedules), including investment and risk management criteria for any material non-treasury investment portfolios.
    - Performance measurement and management (TMP2 and schedules), including methodology and criteria for assessing the performance and success of non-treasury investments.

- Decision making, governance and organisation (TMP5 and schedules), including a statement of the governance requirements for decision making in relation to non-treasury investments; and arrangements to ensure that appropriate professional due diligence is carried out to support decision making.
- Reporting and management information (TMP6 and schedules), including where and how often monitoring reports are taken.
- Training and qualifications (TMP10 and schedules), including how the relevant knowledge and skills in relation to non-treasury investments will be arranged.

Minimum Revenue Provision Statement

92. Where the Council finances capital expenditure by debt, it must put aside resources to repay that debt in later years. The amount charged to the revenue budget for the repayment of debt is known as Minimum Revenue Provision (MRP), although there has been no statutory minimum since 2008. The Local Government Act 2003 requires the Council to have regard to MHCLG Guidance most recently issued in April 2024.

93. The broad aim of the Guidance is to ensure that capital expenditure is financed over a period that is either reasonably commensurate with that over which the capital expenditure provides benefits, or, in the case of borrowing supported by Government Revenue Support Grant, reasonably commensurate with the period implicit in the determination of that grant.

94. The Guidance requires the Council to approve an Annual MRP Statement each year and recommends a number of options for calculating a prudent amount of MRP. The following statement incorporates the options recommended in the Guidance.

Proposed 26/27 MRP Policy:

- For expenditure incurred before 1 April 2008 or which forms part of supported capital expenditure, the MRP policy will be:
  - Asset life method (annuity) – MRP will be based on an asset life of 50 years calculated using 2.39%.

- For expenditure incurred between 1 April 2008 and 31 March 2019 for all prudential borrowing, the MRP policy will be:
  - Asset life method (annuity) – MRP will be based on an asset life of 50 years calculated using 2.39%.

- For expenditure incurred from 1 April 2019 for all prudential borrowing, the MRP policy will be:
  - Asset life method (straight line) – For service delivery assets MRP will be based on the estimated life of the assets.
  - Asset life method (annuity) – For regeneration and income generating assets MRP will be based on the estimated life of the assets.

- For capital loans to third parties, the MRP policy will be:
  - Where the principal element of the loan is being repaid in annual instalments, the capital receipts arising from the principal loan repayments will be used to reduce the CFR and directly offset the relevant MRP charge.
  - For capital loans to be repaid at the end of their term and thus no principal repayment being repaid annually, there is no requirement for MRP. The Council will undertake an annual financial assessment of the third party's ability to repay the debt, where an expected credit loss or impairment is recognised in a financial year, an MRP charge will be made to an amount at least equal to the amount recognised.

- The Authority will apply the asset life method for any expenditure capitalised under a Capitalisation Direction.

- MRP in respect of assets acquired under Finance Leases or PFI will be charged at an amount equal to the principal element of the annual repayment.

- MRP commencement, MRP will commence in the financial year following the one in which the asset becomes operational.

- For Housing Assets held within the HRA, due to the requirement to make a depreciation charge to the HRA, no further revenue charge for MRP is required.

- Capital Receipts, the Executive Director of Finance may from time to time and when it is beneficial to the efficient financial administration of the Council, apply capital receipts to reduce the CFR and MRP will be calculated on the residual CFR.

- MRP Overpayments:
  - Under the MRP statutory guidance, any charges made in excess of the statutory MRP can be made, known as Voluntary Revenue Provision (VRP).
  - VRP can be reclaimed in later years if deemed necessary or prudent. In order for these amounts to be reclaimed for use in the budget, this policy must disclose the cumulative overpayment made each year. The cumulative VRP overpayments made to date are £0m.
  - The Executive Director of Finance may from time to time and when it is beneficial to the efficient financial administration of the Council, make additional voluntary payments VRP. In these circumstances, the amount paid would not prejudice the existing strategy or be counter to the regulatory intent of that strategy.

95. Based on the latest estimate of the CFR on 31st March 2026, the budget for MRP has been set as £5.468m.

Appendix A: Arlingclose Economic & Interest Rate Forecast – December 2025

Underlying Assumptions:

- The Bank of England duly delivered on expectations for a December rate cut, but, despite softer economic data over the past two weeks, the minutes highlighted increased caution surrounding both the inflation outlook and the speed of future easing. With a close vote of 5-4 in favour of a rate reduction, this suggests that the bar for further monetary easing may be higher than previously thought despite the possibility of the CPI rate falling to target in 2026.

- Budget policies and base effects will mechanically reduce the CPI rate in 2026, on top of the downward pressure arising from soft economic growth and the looser labour market. However, many policymakers appear concerned that household and business inflation and pricing expectations are proving sticky following recent bouts of high price and wage growth, which may allow underlying inflationary pressure to remain elevated. While, the Bank's measure of household expectations ticked lower in December, it remains above levels consistent with the 2% target at 3.5%.

- While policymakers hold valid concerns, these appear somewhat out of line with current conditions; CPI inflation fell to 3.2% in November, private sector wage growth continued to ease amid the highest unemployment rate since the pandemic, and the economy contracted in October after barely growing in Q3. Business surveys pointed to marginally stronger activity and pricing intentions in December but also suggested that the pre-Budget malaise was not temporary. These data are the latest in a trend suggesting challenging economic conditions are feeding into price and wage setting.

- Risks to the growth and inflation outlook lie to the downside, which may ultimately deliver lower Bank Rate than our central case. However, the minutes suggest that the bar to further rate cuts beyond 3.25% is higher and the near-term upside risks to our Bank Rate forecast have increased. Having said that, we believe inflation expectations will naturally decline alongside headline inflation rates.

- Investors appear to have given the UK government some breathing space following the Budget, with long-term yields continuing to trade at slightly lower levels than in late summer/early autumn. Even so, sustained heavy borrowing across advanced economies, the DMO's move towards issuing more short-dated gilts and lingering doubts about the government's fiscal plans will keep short to medium yields above the levels implied by interest rate expectations alone.

Forecast:

- In line with our long-held forecast, Bank Rate was cut to 3.75% in December.
- Continuing disinflation, rising unemployment, softening wage growth and low confidence suggests that monetary policy will continue to be loosened.
- Arlingclose expects Bank Rate to be cut to 3.25% by middle of 2026. However, near-term upside risks to the forecast have increased.
- Medium and long-term gilt yields continue to incorporate premia for UK government credibility, global uncertainty and significant issuance. These issues may not be resolved quickly, and we expect yields to remain higher

	Current	Mar-26	Jun-26	Sep-26	Dec-26	Mar-27	Jun-27	Sep-27	Dec-27	Mar-28	Jun-28	Sep-28	Dec-28
Official Bank Rate													
Upside risk	0.00	0.25	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50
Central Case	3.75	3.50	3.25	3.25	3.25	3.25	3.25	3.25	3.25	3.25	3.25	3.25	3.25
Downside risk	0.00	0.00	-0.25	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50
3-month money market rate													
Upside risk	0.00	0.25	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50
Central Case	3.82	3.55	3.30	3.30	3.30	3.30	3.30	3.30	3.30	3.30	3.35	3.35	3.35
Downside risk	0.00	0.00	-0.25	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50
5yr gilt yield													
Upside risk	0.00	0.40	0.45	0.50	0.55	0.60	0.65	0.70	0.70	0.70	0.70	0.70	0.70
Central Case	3.96	3.85	3.80	3.75	3.75	3.75	3.75	3.75	3.75	3.75	3.80	3.80	3.80
Downside risk	0.00	-0.50	-0.60	-0.70	-0.80	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85
10yr gilt yield													
Upside risk	0.00	0.40	0.45	0.50	0.55	0.60	0.65	0.70	0.70	0.70	0.70	0.70	0.70
Central Case	4.52	4.40	4.35	4.30	4.30	4.30	4.30	4.30	4.30	4.30	4.35	4.35	4.35
Downside risk	0.00	-0.50	-0.60	-0.70	-0.80	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85
20yr gilt yield													
Upside risk	0.00	0.40	0.45	0.50	0.55	0.60	0.65	0.70	0.70	0.70	0.70	0.70	0.70
Central Case	5.16	5.00	4.95	4.90	4.90	4.90	4.90	4.90	4.90	4.90	4.95	4.95	4.95
Downside risk	0.00	-0.50	-0.60	-0.70	-0.80	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85
50yr gilt yield													
Upside risk	0.00	0.40	0.45	0.50	0.55	0.60	0.65	0.70	0.70	0.70	0.70	0.70	0.70
Central Case	4.74	4.65	4.60	4.60	4.60	4.60	4.60	4.60	4.60	4.60	4.65	4.65	4.65
Downside risk	0.00	-0.50	-0.60	-0.70	-0.80	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85

PWLB Standard Rate = Gilt yield + 1.00%

PWLB Certainty Rate = Gilt yield + 0.80%

PWLB HRA Rate = Gilt yield + 0.40%

National Wealth Fund (NWF) Rate = Gilt yield + 0.40%

Appendix B – Existing Investment & Debt Portfolio Position

Existing Investment & Debt Portfolio Position	31.03.2025		31.12.2025	
	Actual Portfolio £m	Average Rate %	Actual Portfolio £m	Average Rate %
Treasury Investments:				
The UK Government	£0.000	0.00%	£6.430	3.91%
Local Authorities	£0.000	0.00%	£0.000	0.00%
Other Government Entities	£0.000	0.00%	£0.000	0.00%
Secured Investments	£0.000	0.00%	£0.000	0.00%
Banks (unsecured)	£10.700	4.63%	£5.030	4.95%
Building Societies (unsecured)	£10.000	5.44%	£0.000	0.00%
Registered providers (unsecured)	£0.000	0.00%	£0.000	0.00%
Money Market Funds	£0.000	0.00%	£0.000	0.00%
Other Investments	£0.000	0.00%	£0.000	0.00%
Total Treasury Investments	**£20.700**		**11.460**	
External Borrowing:				
Public Works Loan Board	(£247.266)	3.96%	(£259.713)	4.80%
Local Authorities	(£30.000)	4.86%	(£57.000)	4.51%
LOBO Loans from Banks	(£13.000)	4.23%	(£13.000)	4.23%
Other Loans	(£5.000)	4.23%	£0.000	0%
Total Gross External Debt	(£295.266)	**4.05%**	(£329.713)	**4.40%**
Net Investment/(Debt)	(£274.566)		(£318.253)	

Cabinet Report Sign Off Sheet

(Please speak with Philippa Braithwaite in Democratic Services for any assistance)

Name of report: Capital Strategy 2026/27 to 2028/29 Report Author(s): Neil Kissock Date of Cabinet: 11 February 2026

Initial Sign off

(We suggest these are completed prior to the draft report deadline)

Has the report been to Service DMT?	Yes ☐ Date: No ☐
Has the report been considered by SLG?	Yes ☐ Date: No ☐
Has the report been considered by other Board? (e.g. Regeneration Board)	Yes ☐ Date and Board(s): No ☐
Has the report been considered by an Assurance Board?	Yes ☐ Date and Board(s): No ☐

Formal sign off

(Please note, no report will be issued without the following sign offs)

Reviewed by Cabinet Member	Date:
Reviewed by Executive Lead	Date:
Legal review	Date:
Finance review	Date:
S151 officer review	Date:
MO review	Date:

Classification: Open	Decision Type: Key

Report to:	Overview & Scrutiny: 10 February 2026 Cabinet: 11 February 2026 Council: 25 February 2026	**Date:**
Subject:	Capital Strategy 2026/27 to 2028/29	
Report of	Cabinet Member of Finance and Transformation	

Summary

The Capital Strategy forms part of the Council's strategic and financial planning framework and provides a framework within which the investment plans will be delivered. The Capital Strategy 2026/27 to 2028/29 has been prepared to cover a 3-year period and is set out within this report.

The Capital Strategy reflects the Prudential and Treasury Management Codes issued by CIPFA in 2017 which require Councils to prepare a Capital Strategy and include specific information within it. The strategy therefore includes:

- A high-level, long-term overview of how capital expenditure, capital financing and treasury management contribute to the provision of services.
- An overview of how the associated risk is managed.
- The proposed capital programme 2026/27 to 2028/29
- Financing the capital programme.

The Capital Strategy is prepared to deliver on the objectives of the Council as set out in the Let's Do It! Strategy, and sets out long-term capital investment objectives, capital strategy requirements, governance arrangements and risk.

This strategy links directly to the medium-term financial strategy, the treasury management strategy, the schools' capital strategy, the ICT and digital strategies and the asset management plan.

Recommendation(s)

That Overview & Scrutiny:

- Note the content of this report.

- Consider if they wish to make any recommendations to the Cabinet on this report's content.

That Cabinet:

- Approve and commend the capital strategy to Council.

Reasons for recommendations(s)

As a requirement of Local Authorities (Capital Finance and Accounting) (England) Regulations 2003 and the Prudential Code for Capital Finance for Local Authorities 2021.

Alternative options considered and rejected

Not applicable

Report Author and Contact Details:
Name: Neil Kissock
Position: Director of Finance
Department: Corporate Core Department
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1. BACKGROUND

Capital Strategy

1.1 The aim of the Capital Strategy is to ensure that all elected members fully understand the overall long-term policy objectives and resulting Capital strategy implications, governance procedures and risk appetite.

1.2 The Strategy is intended to give a high-level overview of how capital expenditure, capital financing and treasury management activity contribute to the provision of services along with an overview on how associated risk is managed and implications for future sustainability.

1.3 Decisions made for 2026/27 on capital and treasury management will have financial consequences for the Council for many years into the future. They are therefore subject to both a national regulatory framework and to local policy framework, summarised in this report.

1.4 The Strategy considers the Council's long-term aspirations considering corporate objectives, affordability criteria and available resources to guide capital investment decisions.

1.5 The current Strategy has been prepared for the period 2026/27 to 2028/29 but recognizes that capital decisions are often for the longer term. However, longer term spending plans are more uncertain as funding streams, legislative changes, government policy, and the economic climate can influence plans.

1.6 To demonstrate that the Council takes capital expenditure and investment decisions in line with service objectives and properly takes account of stewardship, value for money, prudence, sustainability and affordability, this Strategy sets out the governance process around investment decisions and considers the risk, reward, and impact on the achievement of priority outcomes.

1.7 The Council ensures that all its capital investment plans, and borrowing are prudent and sustainable. In doing so this takes account of the Council's arrangements for the repayment of debt (including through MRP/repayment of loans funds) and consideration of risk, impact, and potential impact, on the Council's overall fiscal sustainability. While indicators are required to be set over a minimum three-year rolling period, they are aligned to the Strategy and Asset Management plans showing sustainability over the longer asset life period.

2. CAPITAL RESOURCES

2.1 The Council assesses the level of planned capital investment and makes a judgement about the level of capital resources which are likely to be available over the period of the programme. The main capital resources

are service specific grants, third party contributions, capital receipts, lease finance and borrowing.

2.2 To support the ambitious programme set for the next three years, borrowing will become a key source of financing, which will result in an increase in the cost of borrowing overall and will add pressure to the revenue budget.

2.3 In developing the capital programme, the cost of borrowing, as a revenue cost, has been estimated and included in Council's Medium Term Financial Strategy.

Capital Financing Requirement (CFR)	**2025-26 Estimate**	**2026-27 Forecast**	**2027-28 Forecast**	**2028-29 Forecast**
	£m	**£m**	**£m**	**£m**
CFR - GF	£256.449	£283.507	£283.871	£288.028
CFR - HRA	£132.024	£142.498	£147.362	£154.186
CFR - Policy/Non-Financial Investments	£65.683	£63.519	£62.986	£62.437
CFR - Other Debt Liabilities	£9.958	£9.129	£8.258	£7.344
CFR Balance	**£464.113**	**£498.652**	**£502.477**	**£511.995**
Movement in CFR	**£61.541**	**£34.538**	**£7.825**	**£9.518**
Movement in CFR				
Financing Requirement	£66.203	£40.835	£13.364	£15.324
Minimum Revenue Provision (MRP) / Loans Fund Repayments	(£3.447)	(£5.468)	(£4.668)	(£4.891)
Voluntary Revenue Provision (VRP)	£0.000	£0.000	£0.000	£0.000
Other Debt Liabilities Movements	(£1.215)	(£0.829)	(£0.871)	(£0.915)
Movement in CFR	**£61.541**	**£34.538**	**£7.825**	**£9.518**

2.4 The Authority's MRP (minimum revenue provision statement) and loans fund policy is further set out within the Treasury Management Strategy.

2.5 Central Government Allocations and External Grants and Contributions

2.5.1 Some capital projects are financed through allocations received directly from the Government Departments or external grants and contributions, which are mostly specific to projects and cannot be used for other purposes.

2.5.2 Examples of these would include the allocations for schools, highway maintenance or disabled facilities grants from Central Government.

2.5.3 Some of the new funds being made available by the Government are subject to competitive bidding rounds and to maximise the opportunity that these present, the Council needs to ensure it has the required resources to develop these bids.

2.5.4 Grants from external organisations are a valuable source of capital finance for the Council and have enabled the Council to realise a substantial number of Capital developments in the past that would otherwise have been unable to progress.

2.5.5 The Council will continue to explore cost effective opportunities for grants from external bodies. However, support through grants cannot be accurately predicted and therefore the Council recognises that it cannot depend on this source entirely. The Council will also ensure that withdrawal plans are prepared in the case of on-going projects funded through external support, in the event of the support being withdrawn.

2.6 Capital Receipts

2.6.1 The Council generates capital resources through the sale of surplus land and buildings. The Cabinet, at its November 2020 meeting, approved an accelerated land disposal programme aimed at generating significant capital receipts for the Borough of Bury and reducing the ongoing costs related to the maintenance of its surplus property portfolio.

2.6.2 A summary of the anticipated capital receipts adjusted to take into consideration a risk analysis on time and value, is included in the table below:

Table 1: Estimates of Capital Receipts in £ millions

Confidence Level	Adjustment Factor	2026-27 £m	2027-28 £m	2028-29 £m
High	80%	£0.059	£0.800	£0.800
Medium	65%	£2.976	£2.014	£1.360
Low	33%	£0.000	£0.000	£0.000
TOTAL Estimated Receipts		**£3.035**	**£2.814**	**£2.160**

2.6.3 For prudence it is recommended that only those values of high confidence or already complete are taken forward and recognised as a funding source for the capital programme.

2.6.4 The Council holds its General Capital Receipts corporately, to reflect its commitment to a priority-led approach to the allocation of resources and continues to maintain a policy of not ring-fencing the use of capital receipts to fund new investment in specific schemes or service areas. However, it does recognise that exceptionally there will be instances in which it will be necessary to earmark receipts to schemes, as reflected in the Capital Receipts Strategy approved by Capital Board in June 2023.

2.6.5 The receipts generated from the sales of Right to Buy and other general

Housing receipts will be retained for re-investment in the Council's housing provision.

Flexible Use of Capital Receipts

2.6.6 The flexibility for councils to use capital receipts to be support revenue expenditure that delivers service transformation has been extended and £2m is included for 2026/27. The £2m will be used to support the revenue budget and will be applied to Adults and Children's Social Care £0.600m, enabling services across the Corporate Core including Procurement £0.400m, Finance £0.350m, HR £0.350m and digital £0.300m. These amounts will support transformational activity resulting in reductions in revenue requirement in future years.

2.7 Borrowing

2.7.1 From 1 April 2004 Authorities have had the discretion to borrow in line with the CIPFA Prudential Code, which is known as 'Unsupported Borrowing.'

2.7.2 The Council can make use of the opportunity for the Prudential Borrowing where it is most cost effective and if its capital investment plans are affordable, sustainable, and prudent. Hence, make a choice on whether revenue resources are used to fund direct service delivery or reserved to finance costs of borrowing for capital investment.

2.7.3 The Council will consider the use of unsupported borrowing in three specific circumstances:

1) Strategic investment – where strategic investment to support the Borough's economy is required, subject to a detailed business case.
2) Invest in saving schemes - where pump priming assistance is required, but overall, costs are met from additional revenue/capital income or savings generated by the scheme. Pump priming can be funded from unsupported borrowing or from slippage/internal resources.
3) Discretionary unsupported schemes - where the related expenditure meets with Council ambitions/priorities at service level and would not be able to proceed through another funding source. Any such schemes must be specifically approved by the Cabinet or Council and be supported by a detailed business case.

2.7.4 The business case should explain the link between borrowing and expected asset lives, to ensure that an appropriate charge is built-in in the revenue budget and reflected in Council Tax and Housing Rent levels.

2.8 Revenue Contributions and Reserves

2.8.1 The Council can also use revenue resources to fund capital projects, although revenue budgets have come under increased pressure over

recent years and the ability to use revenue is restricted.

2.8.2 The proposed Capital Programme requires borrowing and the cost of borrowing to support the 2026/27 programme has been factored into the 2026/27 budget. Any requirements beyond this will need to be factored into the Medium-Term Financial Strategy (MTFS). The Council may also finance capital schemes from S106 monies or earmarked reserves.

2.9 Joint Ventures

2.9.1 The Council is currently undertaking significant regeneration activity in both Bury and Prestwich Town Centres, for which the Authority has engaged with national developers as Joint Venture partners for the Mill Gate Shopping Centre and Prestwich Village.

2.9.2 These programmes will deliver significant housing growth in addition to enhanced business rates income, whilst safeguarding the sustainability and vitality of each town centre.

2.9.3 Bruntwood and Bury Council acquired the Mill Gate shopping centre as part of wider regeneration plans that to overhaul Bury town centre. The shopping centre is being redeveloped into a mixed-use scheme, blending retail, leisure, hospitality, workspace, residential and public realm and community spaces.

2.9.4 The Council and Muse are working together on regeneration schemes for Prestwich Village including a community hub, a new village square, retail, leisure facilities and new homes.

2.9.5 The Capital Programme includes £18.3m investment into Prestwich village over the next two years. The Joint Venture partners are considering the funding strategies for the development, alongside development design and phasing arrangements.

3. CAPITAL EXPENDITURE AND FINANCING PROPOSALS

3.1 Capital expenditure is where the Council spends money on assets, such as property or vehicles, which will be used for more than one year. In local government this includes spending on assets owned by other bodies, and loans and grants to other bodies enabling them to buy assets.

3.2 In 2026/27 the Council is planning capital expenditure of £110.212m, summarised in the table below:

Table 2: Prudential Indicator: Estimates of Capital Expenditure in £ millions

	2025/26 forecast £m	2026/27 budget £m	2027/28 budget £m	2028/29 budget £m
General Fund services	£94.615	£78.951	£25.719	£11.000
Council Housing (HRA)	£25.000	£31.261	£23.056	£16.549
Capital Investments	£0.000	£0.000	£0.000	£0.000
TOTAL	**£119.614**	**£110.212**	**£48.775**	**£27.549**

3.3 The Council's 2026/27 to 2028/29 proposed capital investment is further detailed in Appendix 1. The proposed programme takes account of the latest monitoring position on the 2025/26 capital programme including any identified rephasing that has been agreed for carry forward into the 2026/27 and 2027/28 financial years.

3.4 The proposed Capital Programme is focused on some main themes that align to the Council's objectives and outcomes including:

- Regeneration and Housing General Fund (key areas within the borough).
- Highways.
- Schools.
- Environmental & Communities Projects.
- Corporate Property.
- ICT & Digital Transformation.
- Organisation Redesign & Transformation.
- Housing (Housing Revenue Account).

3.5 The 2025/26 revised capital budget is £119.615m compared to the original budget set in February 2025 which amounted (including Approved in Principle schemes) to £133.255m. The following schemes are proposed to have some of their 2025/26 budget rephased into 2026/27 and 2027/28:

Table 3: Re-phasing of Capital Expenditure to future years, in £millions

Capital Theme	Rephasing to 2026/27 £m	Rephasing to 2027/28 £m
Regeneration and Housing	£11.395	£0.000
Schools	£8.206	£5.000
Highways	£5.765	£9.519
Environmental & Communities Projects	£1.300	£0.200
Corporate Property & Estates	£0.387	£0.000
Transport Fleet Management	£0.462	£0.000
ICT & Digital Transformation	£0.000	£0.000
Organisation Redesign & Transformation	£0.000	£0.000
Housing HRA	£5.410	£0.000
Grand Total	**£32.925**	**£14.719**

3.6 The Housing Revenue Account (HRA) is a ring-fenced account which ensures that council housing does not subsidise, or is itself subsidised, by other local services. HRA capital expenditure is therefore recorded separately and includes the building of new homes over the forecast period.

3.7 During the year it is expected that further government funding allocations will be announced, or new initiatives identified and put forward for approval. The Council can elect to fund the latter from other sources, including capital receipts, other partners' contributions, or reserves. The phasing of expenditure as more detailed implementation plans is drawn up is considered a normal feature of the capital programme.

3.8 The capital programme position will continue to be closely monitored during the financial year and all the latest information in respect of funding allocations will be presented to Members in future reports.

4. ONGOING SCHEMES

Given the Council's financial challenges over the planning period as set out in its Medium-Term Financial Strategy, the major focus of the next few years will be to deliver schemes already approved by Council for which funding has already been identified and agreed. These are set out in Appendix 1 to this report.

5. NEW CAPITAL SCHEMES AND APPROVAL IN PRINCIPLE

5.1 Although most of the schemes set out in the Council's capital programme are projects that have already been agreed, with funding identified and the financial implications included in the draft budget for 2026/27 (and the Medium-Term Financial Strategy), officers have identified additional projects which are recommended for inclusion in the programme given their importance either to the achievement of priorities included in the Corporate Plan (Let's Do It!) or because of urgent works required to address health and safety issues and other risks to service delivery:

NEW CAPITAL SCHEMES	2026/27 budget £m	2027/28 budget £m	2028/29 budget £m
Castle Leisure Centre Refurbishment	£3.175	£0.000	£0.000
Regeneration and Housing (corporate pot)	£1.700	£1.700	£1.700
Schools (Devolved Formula grant)	£0.150	£0.000	£0.000
Highways (GMCA CRSTS maintenance grant)	£4.085	£0.000	£0.000
Highways - HIS4	£4.000	£0.000	£0.000
Transport Fleet Management	£0.038	£0.500	£0.500
Environmental & Communities Projects (corporate pot)	£0.750	£0.750	£0.750
Organisation Redesign & Transformation (corporate pot)	£2.600	£1.500	£1.500
TOTAL NEW SCHEMES	**£16.498**	**£4.450**	**£4.450**

5.2 The new schemes include an extension of the Highways Investment Strategy, designed to support improvements to the Highways Network, and an additional £1.1m now required to complete the implementation of the Unit 4 system upgrade and address the additional complexities resulting from the volume of integrating systems, coding complexities and gaps in process documentation and ensure planned revenue savings are fully delivered .

5.3 It is recommended that the Council endorses the medium-term schemes included in the Capital Strategy for 2026/27 to 2028/29 as set out in Appendix 1. The longer-term aspirations that the Council has for the communities it serves are ambitious and rely on the Council applying the resources at its disposal in ways which deliver the greatest impact. Those resources include capital resources which will be targeted at capital expenditure that has the greatest prospect of delivering the Council's aspirations set out in its Corporate Plan (Let's Do it!).

5.4 To ensure value-for-money and maximise the use of limited available capital resources, a corporate amount is proposed for the key areas below to focus future capital investment delivers the longer-term objectives of the Council:

- Regeneration and Housing
- Environmental & Communities
- Corporate Estate
- Digital Transformation
- Strategic Organisation Transformation

5.5 During the year, support will be given to new proposed schemes following a capital gateway submission. appraisal and evaluation process is completed through the Capital Programme Board, a sub-set of the Finance Board, comprising key officers from each service who will make recommendations based on detailed delivery plans and assessment based on options appraisals, risk management assessment, financial appraisal, strategic-fit and value-for-money for the Council.

5.6 For the purposes of capital planning, it is expected that through implementing this approach, will ensure the necessary scrutiny ahead of individual scheme approval to spend and provide members with reassurance on the intended and achieved outcomes for capital expenditure.

5.7 The Finance Board will continue to oversee the process of incepting additional schemes into the capital programme, according to the Council's agreed policies and on the recommendation of the Capital Programme Board.

6. FUNDING THE CAPITAL PROGRAMME

6.1 All capital expenditure must be financed, either from external sources (government grants and other contributions), the Council's own resources (revenue, reserves, and capital receipts) or debt (borrowing or leasing). The planned financing of the above expenditure is as follows:

Table 4: Capital expenditure and financing in £ millions

CAPITAL PROGRAMME	2025/26 Forecast Outturn £m	2026/27 Proposed Programme £m	2027/28 Proposed Programme £m	2028/29 Proposed Programme £m
Capital Expenditure by Theme				
Regeneration and Housing	57.004	19.295	4.500	4.500
Schools	8.742	18.656	5.000	0.000
Highways	16.046	26.195	9.519	0.000
Environmental & Communities Projects	3.292	3.007	1.200	1.000
Corporate Property & Estates	5.880	5.957	2.000	2.000
Transport Fleet Management	0.249	0.500	0.500	0.500
ICT & Digital Transformation	1.520	1.500	1.500	1.500
Organisation Redesign &Transformation	1.882	3.840	1.500	1.500
SUBTOTAL EXPENDITURE GF	**94.615**	**78.951**	**25.719**	**11.000**
Housing HRA	25.000	31.261	23.056	16.549
TOTAL COUNCIL EXPENDITURE	**119.614**	**110.212**	**48.775**	**27.549**
Financing the Capital Programme				
Prudential Borrowing	55.488	30.361	8.500	8.500
External Funding	36.291	48.589	17.219	2.500
Capital Receipts	2.747	0.000	0.000	0.000
General Fund RCCO	0.089	0.000	0.000	0.000
Subtotal GF FINANCING	**94.615**	**78.951**	**25.719**	**11.000**
Prudential Borrowing HRA	10.715	10.474	4.864	6.824
External Funding HRA	2.330	0.000	2.240	0.000
Capital Receipts HRA	2.967	3.120	1.260	0.000
Housing Revenue Account DRF/MRR	8.988	17.667	14.692	9.725
Subtotal HRA FINANCING	**25.000**	**31.261**	**23.056**	**16.549**
TOTAL FINANCING	**119.614**	**110.212**	**48.775**	**27.549**

6.2 It is proposed that schemes be funded through a combination of external grants and allocations, capital receipts and borrowing. The borrowing costs have been reflected in the Council's Treasury Management Strategy for 2026/27 - 2028/29

6.3 The financing mix includes several external funding and grants that will be received by the Council as schemes progress throughout the year and expenditure is realised. These are conditional grants and for programmes such as Highways the expenditure is also reliant on further approval of developed plans, thus ensuring the objectives set by GMCA are achieved and are in line with the Greater Manchester Transport, Active Travel, Road Development and Safety and the 'Streets for All' programmes.

6.4 The table below shows the capital funding that is ultimately controlled by Council and funding which is further subjected to the GMCA governance.

Table 5: Highways proposed capital expenditure in £ millions

Highways Expenditure 2026-27	Funded by:	Funding type:	2026-27 Proposed Programme £m	2027-28 Proposed Programme £m	2028-29 Proposed Programme £m
Capital Programme					
Highways Planned Maintenance	City region Sustainable Transport (CRSTS)	grant	**5.437**	**0.000**	**0.000**
Highways Key Route Network	City region Sustainable Transport (CRSTS)	grant	**1.520**	**0.000**	**0.000**
Other schemes / Road markings	Council discretionary resources	loan	**0.138**	**0.000**	**0.000**
Street Lighting Capital Repairs/Replacements	CRSTS allocation	grant	**0.149**	**0.000**	**0.000**
Road Safety	Integrated Transport B (ITB)	grant	**0.610**	**0.000**	**0.000**
Network North Highways Maintenance	High Speed2 (HS2) allocation	grant	**0.113**	**0.000**	**0.000**
HIS4	Council discretionary resources loan	Loan	4.000	**0.000**	**0.000**
Subtotal maintenance expenditure:	**Planned to spend during the financial year**		**11.967**	**0.000**	**0.000**
Mayor Challenge Fund schemes (MCF)	GMCA grant	grant	**3.201**	**1.985**	**0.000**
Active Travel Fund schemes	GMCA grant	grant	**2.954**	**0.000**	**0.000**
Streets for All	GMCA grant	grant	**7.229**	**7.128**	**0.000**
CRSTS Improving bus infrastructure/ Pinch Points	GMCA grant	grant	**0.844**	**0.406**	**0.000**
Subtotal GMCA / TfGM directed schemes:	**Expenditure per GMCA / TfGM approval of BIDS / Business case/ design and development of schemes**		**14.228**	**9.519**	**0.000**
TOTAL EXPENDITURE			**26.195**	**9.519**	**0.000**

7. PRIORITISING, MANAGING, MONITORING, REPORTING AND EVALUATING THE CAPITAL PROGRAMME

7.1 Prioritising Capital Resources

7.1.1 It has long been demonstrated that the demand for capital investment

tends to exceed available resources. To alleviate this, a robust mechanism will be implemented during 2026/27, to assess schemes against key criteria and assist in decision prioritisation for the use of capital resources.

7.1.2 A cross departmental multi-disciplinary team will act as a Capital Programme Board, to review the capital gateway processes during the year. This includes a review of governance and the approval and monitoring of capital schemes. The process will ensure wider ownership of the monitoring of the capital programme and will include progress updates on each scheme against forecast outcomes as well as risk monitoring.

7.1.3 This framework prioritises the capital investment for the Council's Capital Programme. By using this prioritisation process on a rolling basis to decide the schemes to be released in-year and those schemes phased into later years, it allows the review of the whole three-year rolling capital programme. This review of schemes allows the addition, withdrawal or deferral of capital investment ensuring available capital resources are focused on the achievement of corporate priorities and deliverables.

7.1.4 Reviewing the Capital Programme is an on-going process and in the past several years the available resources have been reducing constantly due to newly identified funding requirements and a slowdown in available assets suitable for disposal as surplus to business needs. A full review of the capital programme has been carried out which has provided greater insight and transparency of the programme. This means that the Council can be more effective in its monitoring and scrutiny.

7.1.5 As part of the gateway process, resource requirements including specialist support will be assessed. Ensuring that sufficient resources are available across the organisation to support the delivery of the capital programme is key to its delivery and the Capital Programme Team will explore and capture the dependencies of each project for teams to be able to plan resources accordingly.

7.2 Monitoring and Reporting on the Capital Programme

7.2.1 The Capital Programme will be monitored regularly throughout the year by the Capital Programme Board and will be reported to Cabinet on a quarterly basis.

7.2.2 Details of spend, potential re-profiling of the programme and any significant changes in funding assumptions, including the level of asset disposals which are always critical for the delivery of the Capital Programme will continue to be included in the quarterly and other, ad-hoc reports throughout the year to ensure Cabinet and Members are kept informed of the programme's progress and delivery.

8. COMMERCIAL ACTIVITIES

8.1 The Council can invest in property or other commercial activities purely or mainly for financial gain, however local authorities must not borrow to invest primarily in financial returns. Investment assets bought primarily for financial return previously known as investment assets bought primarily for yield) are assets that serve no direct policy purpose but are held primarily to generate an income.

8.2 The Council has made an equity investment in Manchester Airport Car Park (1) Limited, (along with the other nine Greater Manchester District Councils). The Council's investment is to provide car parking facilities at Manchester Airport. The Council holds 3 Class C ordinary shares. The Council also has a 3.22% shareholding in Manchester Airport Holdings Limited (MAHL).

8.3 The proposed capital programme for 2026 to 2029 does not include any investment of this nature, thus ensuring the ability to borrow from the Public Works Loan Board (PWLB) for its capital plan is maintained over the next three years.

8.4 The Council will continue to observe the guidance and updates from the Ministry of Housing, Communities and Local Government, and HM Treasury that refers to the non-financial yield bearing investments.

9. RISK MANAGEMENT

9.1 There are some inherent risks considered in the Capital Strategy, including:

9.1.1 There is a risk that capital receipts are not realised to the level anticipated in the calculation of resources available to fund the capital programme. This is a major risk and is one that has impacted on past programmes. To mitigate this risk, it is recommended that schemes reliant (in large part or entirely) on capital receipts do not begin until there is a high degree of certainty that the relevant receipts will materialise.

9.1.2 Changes in the Bank of England Base Rate and their impact on the Council's cost of borrowing can affect the financing of the capital programme. The Council's budget for 2026/27 includes forecasts of interest rate changes during the year and based on the best information available from the Council's financial advisors, Arlingclose, provides sufficient resources to fund the proposed programme of works. Planning for Prudential Borrowing can be affected by rises in interest rates, making the borrowing option less attractive as a funding option and putting at risk longer term large capital schemes.

9.1.3 A normal feature of any large capital programme is that schemes may need re-profiling from one year to the next. The risk is mitigated by slipping corresponding resources between years and for the Council is not considered to be a particular issue in terms of the overall delivery of the programme. The capital gateway processes to be refined for 2026 will further improve the profiling of expenditure and the delivery of schemes in line with expectations.

9.1.4 Scheme cost increases can occur due to a range of factors and sometimes cannot be mitigated without impacting on other schemes in the programmed or future years' resources. This risk is mitigated by using sound costing techniques, effective project management and monitoring schemes using a risk assessment approach.

9.1.5 Delivery of the programme and ensuring sufficient capacity is available are risks. As part of the new gateway processes, resource requirements for delivery are fully assessed and incorporated in detail plans. This includes ensuring appropriate specialist skills and requirements are identified and that arrangements are in place for these to be sourced.

9.1.6 Government grant funding is key to delivering the Council's aspirations and longer-term ambitions. As changes or reductions to government grant funding may adversely affect the delivery of the capital programme, the funding available for capital investment is closely monitored and included in reports to Cabinet throughout the year.

10. KNOWLEDGE and SKILLS

10.1 The Capital Programme and the Treasury Management function are both managed by teams of professionally qualified accountants with considerable experience of local government finance. Officers maintain and develop their skills and knowledge through programmes such as Continuous Professional Development and by attending various courses and conferences held by CIPFA and other sector experts on an ongoing basis.

10.2 The Director of Finance, in their capacity as Section 151 Officer, has overall responsibility for ensuring the proper management of the Council's capital programme, asset portfolio and treasury management activity and follows an ongoing CPD programme.

REFERENCES and IMPLICATIONS

Links with the Corporate Priorities:

The strategic imperatives of the Let's Do It! Strategy, to deliver economic growth faster than the national average are facilitated by this capital programme which is supporting the

economic regeneration of our Borough and the building and development of new schools and educational places.
This Capital budget provides the resources to maintain the Councils strategic leadership of the LETS's Do IT! Strategy, including the specific delivery priorities for 2026/27 and beyond which are described in the Corporate Plan.

1. Delivery of the Let's Do It Strategy is dependent on resources being available. The delivery of the strategy may be affected by changes in funding and spending.

Equality Impact and Considerations:

2. *Not applicable*

Environmental Impact and Considerations:

1. *The Council is working towards becoming a carbon neutral organisation by 2038.*
2. *All Capital building projects are developed with carbon impacts fully taken into consideration.*

Assessment and Mitigation of Risk:

Risk / opportunity	**Mitigation**
The Council's capital resources are not managed effectively.	The capital programme and the gateway process ensure that all available resources are identified and that, where borrowing is required, the costs are reflected in the Council's revenue strategy.
The Council's capital resources are not targeted to priorities and outcomes and the benefit of the investment across the Borough is not maximised.	The approach ensures that schemes can be developed and prioritised throughout the year and that appropriate monitoring arrangements are in place.

Legal Implications:

This report forms the suite of reports with Members need to consider when setting the Council's budget. Members need to give due regard to the setting of the capital budget when undertaking the budget setting process.

The Council must set the budget in accordance with the provisions of the Local Government Finance Act 1992 and approval of a balanced budget each year is a statutory responsibility of the Council.

The Council is required by the Local Government Finance Act 1992 to make

specific estimates of gross revenue expenditure and anticipated income leading to the calculation of the Council tax requirement and it must be sufficient to meet the Council's legal and financial commitments to ensure the proper discharge of its statutory duties and lead to a balanced budget. In setting the budget the Council has a duty to ensure that it continues to meet its statutory duties.

Financial Implications:

The financial implications are detailed within the report.

Appendices:

Appendix 1 Capital budget.

Background papers:

2025/26 Q2 Finance Position

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

Term	Meaning
CIPFA	Charter Institute of Public Finance and Accountancy
JV	Joint Venture
HRA	Housing Revenue Account
DFE	Department for Education
SEND	Special Educational Needs and Development

APPENDIX 1	2026/27 Capital Programme					2027/28 Capital Programme				2028/29 Capital Programme	
	Prior Year Approvals £m	Cabinet / Op Dec Approved New schemes £m	Rephasing from 2025/26 £m	New Schemes Feb 2026 £	Revised Proposed Programme £m	Approved Bids FEB25 £m	Rephasing from 2025-26 £m	New Schemes Feb 2026 £m	Revised Proposed Programme £m	Approved Bids FEB25 £m	Revised Proposed Programme £m
Capital Expenditure by Theme											
Regeneration and Housing	**£6.200**	£0.000	£11.395	£1.700	**£19.295**	£2.800	£0.000	£1.700	**£4.500**	£4.500	**£4.500**
Schools	**£10.300**	£0.000	£8.206	£0.150	**£18.656**	£0.000	£5.000	£0.000	**£5.000**	£0.000	**£0.000**
Highways	**£11.802**	£0.543	£5.765	£8.085	**£26.195**	£0.000	£9.519	£0.000	**£9.519**	£0.000	**£0.000**
Environmental & Communities Projects	**£0.958**	£0.000	£1.300	£0.750	**£3.007**	£0.250	£0.200	£0.750	**£1.200**	£1.000	**£1.000**
Corporate Property & Estates	**£2.395**	£0.000	£0.387	£3.175	**£5.957**	£2.000	£0.000	£0.000	**£2.000**	£2.000	**£2.000**
Transport Fleet Management	**£0.000**	£0.000	£0.462	£0.038	**£0.500**	£0.000	£0.000	£0.500	**£0.500**	£0.500	**£0.500**
ICT & Digital Transformation	**£1.500**	£0.000	£0.000	£0.000	**£1.500**	£1.500	£0.000	£0.000	**£1.500**	£1.500	**£1.500**
Organisation Redesign & Transformation	**£0.000**	£1.240	£0.000	£2.600	**£3.840**	£0.000	£0.000	£1.500	**£1.500**	£1.500	**£1.500**
TOTAL GF EXPENDITURE	**£33.155**	**£1.783**	**£27.515**	**£12.498**	**£78.951**	**£6.550**	**£14.719**	**£4.450**	**£25.719**	**£11.000**	**£11.000**
Housing HRA	**£15.858**	**£0.000**	**£5.410**	**£9.993**	**£31.261**	**£0.000**	**£0.000**	**£23.056**	**£23.056**	**£16.549**	**£16.549**
TOTAL COUNCIL EXPENDITURE	**£49.013**	**£1.783**	**£32.925**	**£22.490**	**£110.212**	**£6.550**	**£14.719**	**£27.506**	**£48.775**	**£27.549**	**£27.549**
Financing the Capital Programme											
Prudential Borrowing	**£7.405**	£1.240	£7.534	£14.182	**£30.361**	£4.050	£0.000	£4.450	**£8.500**	£8.500	**£8.500**
External Funding	**£24.250**	£0.543	£19.981	£3.815	**£48.589**	£2.500	£14.719	£0.000	**£17.219**	£2.500	**£2.500**
Capital Receipts	**£1.500**	£0.000	£0.000	(£1.500)	**£0.000**	£0.000	£0.000	£0.000	**£0.000**	£0.000	**£0.000**
General Fund RCCO	**£0.000**	£0.000	£0.000	£0.000	**£0.000**	£0.000	£0.000	£0.000	**£0.000**	£0.000	**£0.000**
SUBTOTAL GF FINANCING	**£33.155**	**£1.783**	**£27.515**	**£12.497**	**£78.951**	**£6.550**	**£14.719**	**£4.450**	**£25.719**	**£11.000**	**£11.000**
Prudential Borrowing HRA	**£0.000**	£0.000	£0.000	£10.474	**£10.474**	£0.000	£0.000	£4.864	**£4.864**	£6.824	**£6.824**
External Funding HRA	**£0.000**	£0.000	£0.000	£0.000	**£0.000**	£0.000	£0.000	£2.240	**£2.240**	£0.000	**£0.000**
Capital Receipts HRA	**£0.058**	£0.000	£2.440	£0.622	**£3.120**	£0.000	£0.000	£1.260	**£1.260**	£0.000	**£0.000**
Housing Revenue Account DRF/MRR	**£15.800**	£0.000	£2.970	(£1.103)	**£17.667**	£0.000	£0.000	£14.692	**£14.692**	£9.725	**£9.725**
SUBTOTAL HRA FINANCING	**£15.858**	**£0.000**	**£5.410**	**£9.993**	**£31.261**	**£0.000**	**£0.000**	**£23.056**	**£23.056**	**£16.549**	**£16.549**
TOTAL FINANCING	**£49.013**	**£1.783**	**£32.925**	**£22.490**	**£110.212**	**£6.550**	**£14.719**	**£27.506**	**£48.775**	**£27.549**	**£27.549**

Appendix 4

Dedicated Schools Grant

1. Executive Summary

1.1. The Dedicated Schools Grant (DSG) is the ringfenced grant from Government that provides each local authority with an allocation of funding for schools and services for pupils.

1.2. The DSG contains four blocks determined by a separate funding formula which calculates the total funding due to local authorities. In considering how the DSG is allocated it is necessary to consider each block separately. This report sets out the recommendations in relation to the Schools Budget for approval by Council. The detail set out in this report has been discussed and agreed by the Schools Forum at its meetings on 09 December 2025 and 12 January 2026.

2. Recommendations:

2.1. That Overview and Scrutiny:

- Note the content of this report.
- Consider whether to make any recommendations to Cabinet on the content of this report.

2.2. That Cabinet approve and commend to Council:

- The Dedicated Schools Grant budget for 2026-27 at £270.891m and approve the allocations between the four funding blocks as set out in this report.
- The Schools and Academies 2026-27 funding unit values as agreed by Schools Forum and detailed at Annex 1.
- Approve the 2026-27 hourly rates for all early years providers as follows:
    - £5.77 per hour including IDACI weighting, for 3 and 4 year olds;
    - £8.35 per hour including IDACI weighting, for 2 year olds; and
    - £11.30 per hour including IDACI weighting, for under 2s.

- Note the position on the Dedicated Schools Grant deficit and Project Safety Valve.

3. Background

Dedicated Schools Grant

3.1. Details on the Dedicated Schools Grant were published by Government on 17 December 2025. The allocations for Bury are set out in the following table:

2026 to 2027 DSG allocations, before recoupment and deductions for national non-domestic rates, and for direct funding of high needs places by DfE						
Dedicated schools grant (DSG):		Schools block	Central school services block	High needs block	Early years block	Total DSG allocation
351	BURY	(£s)	(£s)	(£s)	(£s)	(£s)
	Final 2025-26 DSG, including additional grants	170,803,013	1,149,642	53,538,534	31,754,242	257,245,431
	2026-27	176,712,533	1,175,003	53,538,534	39,464,722	270,890,792
	Variance to 2025-26 £	5,909,520	25,361	0	7,710,480	13,645,361
	Variance to 2025-26 %	3.5%	2.2%	0.0%	24.3%	5.3%

3.2. The 4 blocks that make up the DSG are:

The Schools Block
This provides funding for individual mainstream schools and academies as well as growth funding for any planned growth in schools. It is the responsibility of the Council to propose and decide any changes to the formula which is used to allocate Schools Block DSG to all primary and secondary schools. The Schools Forum is consulted on any proposed changes and informs the governing bodies of all consultations.

The High Needs Block
This provides funding for the education of pupils subject to Education, Health and Care plans from age 0-25 in a range of provision including special schools, mainstream schools, alternative provision, independent specialist provision and council centrally retained expenditure for high needs support and inclusion. It is the responsibility of the local authority to propose and decide the allocation of High Needs Funding. The Schools Forum is consulted on any proposed changes and informs the governing bodies of all consultations.

The Early Years Block
This provides separate funding streams from nine months up to two years old, two-year-olds, and three-and-four-year-olds in schools and in the Private, Voluntary and Independent (PVI) sector as well as centrally retained expenditure for under-fives. In 2026-27, Local Authorities must pass through a minimum of 97% of funding for each of the stated funding streams. This leaves a balance of up to 3% that can be retained by the Council to contribute to early years functions delivered by education services, for contingency to allow in-year funding to be provided to providers for increased early years pupil participation and for Early Years SEND inclusion funds. It is the responsibility of the local authority to propose and decide on the allocation of early years funding. The Schools Forum are consulted annually and given an opportunity to give their view on the proposals.

The Central Schools Service Block
This provides funding for the local authority to carry out central functions on behalf of pupils in both maintained schools and academies. The local authority proposes the spending allocations funded from the Central Services Block, but the final decision is made by the Schools Forum. Central Schools Services includes the admissions service, Schools Forum administration, National Copyright Licenses and other statutory and regulatory duties.

3.3. There is limited flexibility for councils to transfer funding between the four blocks. The Education and Skills Funding Agency (ESFA) has limited the movement from the Schools Block to 0.5% of the total Schools Block allocation but only with the agreement of the Schools' Forum. Any proposed increase on this is subject to approval by the Secretary of State. Movements from the Central Services Block to any other block are not subject to any limit and can be made in consultation with Schools Forum.

3.4. For 2026-27, Bury's Schools' Forum approved a transfer of 0.2% from the Schools' Block to help support the pressures being faced on the High Needs Block. This equates to a £0.350m contribution to help sustain the recovery of the High Needs deficit. A transfer of 0.2% was recommended and approved on the basis that, in order to transfer 0.5% this would not have left sufficient funding within the Schools Block to meet the national funding formula. This decision can only be made on an annual basis and will be reviewed again next year.

3.5. Furthermore, Schools Forum agreed on 12 January 2026, a transfer of £0.131m from the Central Services Block to the High Needs Block for 2026-27 to support with the council's deficit recovery programme on DSG.

4. DSG Allocation

Schools Block National Funding Formula Allocation

4.1. The Schools Block Allocation for 2026-27 is £176.7m, this is an increase of £5.9m from 2025-26 (when including additional in-year grant allocations).

4.2. In September 2017, the National Funding Formula (NFF) for Schools and Central Services was introduced. The 2026-27 funding factors continue to comply with the national funding formula values.

4.3. Schools Forum has considered the allocation of the Schools Block and have made their recommendations. These have been applied to the formula used to determine individual school allocations and ensure full compliance with statutory requirements.

4.4. In 2025-26, schools received additional funding through the Schools Budget Support Grant and National Insurance Contributions Grant however, for 2026-27 this funding has been rolled into the baseline DSG allocation.

4.5. A full summary of the funding formula factors is set out at Annex 1, and these are recommended for approval by Council.

Central School Services Block Allocation

4.6. The allocation of the Central School Services DSG (CSSB) block is £1.175m in 2026-27, this represents an increase of £0.025m from the 2025-26 allocation. The use of the CSSB is determined by the Schools Forum based upon proposals from the Council in respect to funding ongoing responsibilities and central functions undertaken on behalf of schools and academies.

4.7. The planned use of this funding block in 2026-27 is:

Central Schools Services Block (CSSB)	2026-27
Section 251 – Central Provision	
1.4.2 Admissions	£225,200
1.4.3 Schools' Forum	£19,300
1.4.14 National Copyright Licences	£216,900
Section 251 - Former ESG Services	
1.5.1 Education Welfare	£305,100
1.5.2 Asset Management	£105,300
1.5.3 Statutory / Regulatory inc. SACRE	£73,800
Section 251 - Other	
1.4.14 Teachers Pay and Pension Grant	£98,203
Transfer to High Needs	£131,200
Total Central School Services Block (CSSB)	£1,175,003

High Needs Block Allocation

4.8. Due to the pending Government review of High Needs funding, the overall amount of grant in the 2026-27 High Needs Block has been frozen at the 2025-26 grant level, with the addition of the previously separate grants. The 2026-27 allocation for High Needs DSG is £53.539m. This represents a zero increase from the 2025-26 allocation.

4.9. High needs funding is provided to local authorities through the high needs block of the DSG, enabling them to meet their statutory duties under the Children and Families Act 2014.

4.10. High Needs funding in 2026-27 is therefore based on 2025-26 allocations, without inflation.

Early Years Block Allocation

The Early Years Block allocation for 2026-27 is £39.465m, an increase of £7.710m from 2025-26. The Early Years Block allocation will be adjusted in-year in respect of fluctuations in Early Years participation. From April 2026, the final funding allocation for 2026-27 will be based on termly census data:

Summer Term 2026 13/38ths Autumn Term 2026 14/38ths Spring Term 2027 11/38ths

Therefore, the allocation identified in this report remains indicative.

4.11. For 2026-27, the additional funding increase relates to the free childcare offer introduced in 2025, which has been extended so that eligible working parents in England are able to access 30 hours of free childcare per week for 38 weeks per year from the term after their child turns 9 months to when they start school.

4.12. The initial indicative funding for 2026-27 is as follows:

DSG Early Years Block	2026-27
3&4 YO Basic Entitlement	£9,293,396
3&4 YO Extended Entitlement	£4,492,492
2-year-old disadvantaged entitlement	£1,918,499
2-year-old entitlement for working parents	£8,804,894
Under 2s entitlement	£14,135,613
Early Years pupil premium for 3 & 4-year-olds	£233,798
Early Years pupil premium for 2-year-olds	£133,893
Early Years pupil premium for under 2s	£22,550
Disability access fund for 3 & 4-year-olds	£117,000
Disability access fund for 2-year-olds	£46,800
Disability access fund for under 2s	£7,800
Maintained Nursery Supplementary Funding	£257,987
Total Early Years Block	£39,464,722

4.13. For 2026-27, local authorities are required to pass through at least 97% of funding for each of the following funding entitlement streams individually:

- 3 & 4 YO entitlements
- Under 2's
- 2 YO disadvantaged offer
- 2 YO working parents

Bury Council continues to meet this requirement.

4.14. The remaining grant, up to 3%, can be retained by the council to contribute to central early years functions, contingency for in year increases to early years participation in settings and an Early Years SEND Inclusion Fund. For 2026-27, the retained funding totals 2.8%, with 97.2% being passported.

4.15. In accordance with the statutory requirements, Council is required to approve the hourly rates for Early Years providers which will be applicable from 1 April 2026. These are set out in the table below:

Factor	Hourly Rates
3 & 4 Year Olds	£5.77
2 Year Olds	£8.35
Under 2s	£11.30

The above rates include an average of £0.19 per hour for deprivation. Each child will attract deprivation funding according to the Income Deprivation affecting Children Index (IDACI). The average of £0.19 per hour covers the amounts in table below.

Weighting	2026-27 Supplement per hour
G	£0.00
F	£0.20
E	£0.24
D	£0.37
C	£0.40
B	£0.44
A	£0.57

5. Dedicated Schools Grant Recovery Plan

5.1. Costs of high needs have exceeded the available budget for several years with the DSG deficit at the start of the 2025-26 financial year standing at £19.041m, and is expected to be £21.883m as at 31st March 2026. This deficit had accrued for a number of reasons including increasing volumes of pupils receiving Education, Health and Care Plans (EHCPs), increasing complex needs, increasing costs of provision, previously increased numbers of pupils in out of borough placements, as well as more recent investment made into in-borough inclusion.

5.2. The Department for Education (DfE) established a DSG Safety Valve Programme to work with councils with the greatest deficits to develop an agreed recovery plan with Bury being one of the first five local authorities to develop an agreement with the DfE.

5.3. Bury entered into a formal Safety Valve agreement on 19 March 2021. This original agreement aimed to eradicate the DSG deficit by the end of the 2024-25 with the council to receive an additional £20m of revenue funding to support with its recovery programme.

5.4. The council has undertaken extensive work in repairing and rebuilding Special Educational Needs and Disabilities (SEND) services within the borough over the last four years as part of the Safety Valve programme which has included rebuilding the Education Health and Care Plan (EHCP) team, reworking the EHCP process and launching a graduated approach. In addition, there has been extensive work to reduce the cost of provision in borough and there continues to be work on improving sufficiency in Bury.

5.5. The work undertaken to date has had an impact and had started to reduce the DSG deficit position, however this has been against a backdrop of unprecedented demand. The zero increase in High Needs funding for 2026-27, increased provider costs, and the planned Government review of SEND Provision will impact the Safety Valve plan. A further review will be undertaken once the outcome of the Government's SEND review is known.

Annex 1

Schools and Academies 2026-27 funding unit values

Factor	Sub-level	2025-26	2026-27	Variance to 2025-26		Of which = 25-26 grant transfer	Variance excl. grant transfer
		£	£	£	%	£	%
Basic Entitlement	Primary	**3,847**	**4,064**	217	5.6%	133	2.2%
Age Weighted Pupil Unit (AWPU)	Key Stage 3	**5,422**	**5,686**	264	4.9%	146	2.2%
	Key Stage 4	**6,113**	**6,410**	297	4.9%	165	2.2%
Deprivation							
Free School Meals	Primary FSM	**495**	**505**	10	2.0%	0	2.0%
	Secondary FSM	**495**	**505**	10	2.0%	0	2.0%
Free School Meals - Ever 6	Primary FSM 6	**1,060**	**1,210**	150	14.2%	124	2.5%
	Secondary FSM 6	**1,555**	**1,725**	170	10.9%	132	2.4%
Income Deprivation Affecting Children Indices (IDACI) Primary	IDACI F	**235**	**240**	5	2.1%	0	2.1%
	IDACI E	**285**	**290**	5	1.8%	0	1.8%
	IDACI D	**445**	**455**	10	2.2%	0	2.2%
	IDACI C	**490**	**500**	10	2.0%	0	2.0%
	IDACI B	**520**	**530**	10	1.9%	0	1.9%
	IDACI A	**685**	**700**	15	2.2%	0	2.2%
Income Deprivation Affecting Children Indices (IDACI) Secondary	IDACI F	**340**	**345**	5	1.5%	0	1.5%
	IDACI E	**450**	**460**	10	2.2%	0	2.2%
	IDACI D	**635**	**650**	15	2.4%	0	2.4%
	IDACI C	**695**	**710**	15	2.2%	0	2.2%
	IDACI B	**745**	**760**	15	2.0%	0	2.0%
	IDACI A	**950**	**970**	20	2.1%	0	2.1%
Additional Education Needs Factors							
Looked After Children (LAC)							
English as an Additional Language (EAL)	EAL 3 Years Primary	**595**	**610**	15	2.5%	0	2.5%
	EAL 3 Years Secondary	**1,595**	**1,630**	35	2.2%	0	2.2%
Mobility	Pupils starting school outside normal entry	**965**	**985**	20	2.1%	0	2.1%
		1,385	**1,415**	30	2.2%	0	2.2%
Low cost, high incidence SEN	Low Attainment Primary (below expected EYFS)	**1,175**	**1,200**	25	2.1%	0	2.1%
	Pupils not achieving (KS2 level 4 English and Maths)	**1,785**	**1,825**	40	2.2%	0	2.2%
School-Led Factors							
Lump Sum	Primary	**145,100**	**152,700**	7,600	5.2%	4,486	2.1%
	Secondary	**145,100**	**152,700**	7,600	5.2%	4,486	2.1%
Split Site	Basic Eligibility	**54,000**	**55,100**	1,100	2.0%		
	Distance Eligibility Minimum	**0**	**0**				
	Distance Eligibility Maximum	**27,000**	**27,600**	600	2.2%		
Minimum Per Pupil Funding Levels	MFL - Primary	4,955	**5,115**	160	3.2%	159	0.0%
	MFL - Secondary	6,465	**6,640**	175	2.7%	174	0.0%

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 Budget for 2026/2027
Lead Officer (SRO or Assistant Director/Director)	Neil Kissock
Department/Team	Finance
Proposed Implementation Date	April 2026
Author of the EqIA	Lee Cawley (EDI Manager)
Date of the EqIA	28/1/26

1.1 What is the main purpose of the proposed policy/project/decision and intended outcomes?

Council is seeking to set a budget for the 2026/27 financial year in a continuing period of economic uncertainty.
In order to set a balanced budget, savings proposals totalling £15.961m for 2026/27 and additional Council Tax and Business Rates income of £4.770m (net of grant changes due to the Fair Funding Review) have been brought forward for consideration.
The LET'S Do It! Strategy for 2030 provides the strategic framework for the Council's use of resources using the four clear principles of:

- **Local** neighbourhoods.
- An **Enterprising** spirit.
- Delivering **Together**.
- A **Strengths-based** approach

From a budget planning perspective, the application of the LET'S Do It! strategy is an opportunity to:

- Empower local people and organisations to seek self-help and community-based support rather than immediately engaging with statutory services. The scale of community potential is now evident through the anti-poverty response, for example, with over 80 organisations active in providing cost of living support and the emergence of the Bury Community Support Network
- Tackle health inequalities through a comprehensive local Wellness offer.
- Take a stronger focus on prevention and harnessing community capacity, which has been at the heart of the adult social care transformation since 2019 and continues within this budget.
- Drive innovation such as through the internal transformation strategy which continues to enable digital-first, more efficient processes, user self service
- Deliver inclusive growth through regeneration in order to reduce deprivation and therefore demand on expensive reactive Council and other public services. Growth also creates the potential for increased income from council tax and business rates receipts, through delivery of a pipeline of brownfield-first housing and new locations for business.

As far as possible budget savings options have been developed which are consistent with the LET'S principles. However, given the sheer scale of savings required, this is not universally the case, and, in some instances, proposals simply relate to reduced controllable spend through a reduction in non-statutory service provision.

However, in the delivery of all budget proposals the Council will be cognisant of its statutory obligations in relation to inclusion, as per the Equality Act 2010 and Public Sector Equality Duty, and its local commitment as set out in the LET'S Do It! Strategy and Bury Council EDI Strategy and Objectives 2024-28

This overarching EIA sets out the Council's approach to considering and addressing any potential equality implications of the budget and defines where more detailed proposal-specific EIAs will be undertaken

A number of individual efficiency and savings proposals have been put forward as part of the overall 2026/2027 budget setting. These proposals cover a number of areas affecting residents including health and social care, children's services, district car parking and internal council operating functions. EIAs will be undertaken where these could have an effect on residents, council colleagues or partner organisations. These proposals include:

Commissioned Services - review of client contribution limit for day services

Persona Supported living rate review
Reduction of Leisure council subsidy
Victoria Family Centre delivery model review
Burial vault service fees

No proposal put forward as part of the 2026/2027 budget will affect the delivery of statutory services.

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

It is possible some proposals set out in this budget will have an impact on the council's workforce through council workforce structures, changes to services and the nature of work and services delivered by employees and how residents, businesses and partner organisation interact with employees during their work.

Community/Residents: **Yes**

It is possible that our communities and residents could be impacted by some proposals set out in this budget. Communities and residents may see increased, changed, reduced or removed provisions which could impact their day to day life as residents in the borough.

Third parties such as suppliers, providers and voluntary organisations: **Yes**

It is possible that third parties operating in the borough and/or partnering with the council could be impacted by some proposals set out in this budget, this could affect the operations of these third parties

2.2 Evidence to support the analysis. Include documentary evidence, data and stakeholder information/consultation

Documentary Evidence:

Specific Proposals which could have an equalities impact

Given the complexity and scale of the budget changes required it is challenging to provide an overall analysis of potential impact. As outlined above, inclusion is a central theme of the Council's LET'S Do It! strategy and, in providing a budget which, to a significant extent, aligns with this vision. Officers have sought to mitigate the impact on protected groups in the borough.

Whilst there is the *potential* for disproportionate negative impacts on protected groups in the above areas, the proposal specific EQIAs will need to explore these in more detail and, wherever possible, seek to mitigate this in accordance with the Council's obligations under the Public Sector Equality Duty.

Overall, the scale of budget reductions required across the Council represents a risk of negative impact on protected groups which will need to be closely managed and monitored throughout the implementation process.

It is recognised that the proposed council tax increase is required for the council to meet its statutory duties and requirements. There is a risk of this having a negative impact on the socio-economically vulnerable and, by extension, other characteristics where there is an accepted link to socio-economic vulnerability specifically, younger and older people, disabled people, people who are from ethnic minorities, care leavers and veterans. The same is also true in relation to the proposed rent increases for tenants of the council's housing stock which are required for the council to meet its statutory duties and requirements as landlord.

The Council's cost of living support, LET'S Manage Tough Times and wider work to support the most vulnerable residents through our Neighbourhood Teams and overarching delivery of the LET'S Do It! Strategy will provide support to mitigate this impact insofar as is reasonably possible. Individuals and families may need further individually tailored support with paying rent and council tax which will be considered on a case-by-case basis through relevant support mechanisms.

As a council, we proactively identify and help residents with any support available to them including Pension Credits through our Welfare Support surgeries which are held at different locations throughout the borough, along with support identification taking place for struggling residents through the Supportive Collection Pathway.

The council has changed it's approach to the collection of Council Tax, introducing a Supportive Collection Pathway, whereby residents struggling to pay are engaged with in a different manner and with officers actively seeking to maximise their income and reduce their Council Tax bill prior to a discussion around payment.

The council will also continue to help and support our most vulnerable residents through the allocation of Household Support

Fund, which the government has confirmed will continue for 12 months from April 2026.

The council website brings together information for residents on a variety of support available.
https://www.bury.gov.uk/benefits/lets-manage-tough-times

Data:

Demographics

The council's Employment Equality Report 2025 details an analysis of demographics data of the council workforce and the borough's population, taken from the Census 2021. Headline data from the 2021 census told us:

- Bury's population increased by around 8,800 between the last two censuses (about 5%), to just under 195,000 in 2021.
- 33% of Bury's population are over 50
- 19% of people in Bury are disabled
- 0.47% of the population are transgender* (this question was optional therefore is estimated to be higher)
- 45.3% of the population are married or civilly partnered
- 20.9% of the population listed their ethnic group as a minoritised group with the 'Asian, Asian British or Asian Welsh category the highest at 11%.
- 94% of people in Bury speak English as their main language (compared to 82% in Manchester).
- 48.8% of Bury residents described themselves as Christian, 29% reported having "No religion", while 10% described themselves as Muslim and 6% noted their religion as Judaism.
- Bury's population is made up of 51% women and 49% men
- 3% of people in Bury identified as a sexual orientation other than heterosexual* (this question was optional therefore is estimated to be higher)
- 9.4% of people in Bury stated they had unpaid caring responsibilities for an adult or child who could not manage day to day without their care
- Based on responses 3% of the borough's populations are armed forces veterans, circa 5,000 people (highest areas had over 10%).
- 52.5% of households in Bury fall under the "Household Deprivation" category in the census.

Care Experienced Children and Care Leavers

The census does not capture this information however Bury Council recognises care experienced children and care leavers as an additional protected characteristic. As of January 2025, there were 373 children looked after and 271 care leavers in the borough being supported by the council.

Number of residents receiving council tax support
The Council Tax base data in December 2025 showed a total of 7,607 properties in receipt of council tax support with 88% of these being within Band A and B properties.

Index of multiple deprivation
Index of Multiple Deprivation (IMD) 2025 | Bury Directory

The IMD data shows Bury's 120 Lower Layer Super Output Areas (LSOA) by income and decile
Of the 120 LSOAs, 13 are in the most deprived 10% of LSOAs in the country. These LSOAs are parts of the East, West and Whitefield neighbourhoods
All five neighbourhoods, East, North, Prestwich, West and Whitfield have at least 1 LSOA in the lowest 30% of LOSAs in the country

Incomes and Inflation
The following statistics reflect the expected comparable inflation rates and uplifts in benefits, pensions and pay growth

- The inflation rate as of December 2025 stood at 3.4% CPI and 4.2% RPI (ONS, 2025) and is expected to fall to 2% over this budget period (OBR, 2026)
- The government has implemented an uplift of 4.1% to the national living wage as of 1st April 2026) Minimum wage rates for 2026 - GOV.UK
- The state pension uplift for April 2026 will be 4.8 % Proposed benefit and pension rates 2026 to 2027 - GOV.UK
- Average weekly earnings growth, September to November 2025 is 4.5% Average weekly earnings in Great Britain - Office for National Statistics

Stakeholder information/consultation:

Budget Consultation 26/27 – Analysis of responses

Background

The consultation for the budget proposals for 2026/27 was launched on 4 December 2025 and closed on the 19 January 2026. The consultation focused on gathering opinions on general budget setting principles, strategies that may be employed to continue to deliver savings through the next year and also asked for ideas around income generation for leisure services.

The survey received 726 responses compared to 282 responses for the 2025/26 consultation.

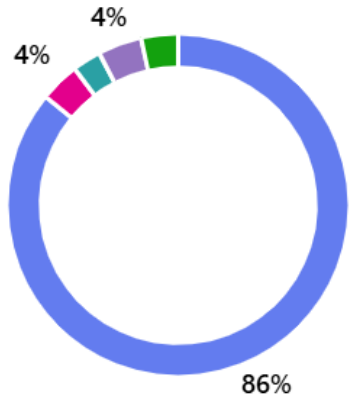
Demographics and Characteristics

Please note that the demographics questions were not mandatory and therefore each question may not add up to the 726 total respondents.

- Respondent type

9. Are you a:

Resident of Bury	665
Business of Bury	29
Part of a public sector organisation	21
Staff member of Bury Council	32
Other	27



- Demographics and Characteristics compared to Census 2021 and the 2025/26 consultation

2026/27 Budget Consultation Demographics and Characteristics Analysis			
	Consultation Reponses 26/27	Consultation Reponses 25/26	2021 Census
Ethnicity			
Asian or Asian British	2%	4%	11%
Black, Black British, Caribbean or African	1%	1%	2%
Mixed of Multiple Ethnic Groups	1%	2%	3%
White	87%	91%	83%
Other Ethnic Group	1%	2%	2%
Gender			
Male	46%	48%	49%
Female	49%	43%	51%
Prefer not to say	5%	8%	
Other	0%	1%	
Age			
Under 18	1.0%	0.4%	23%
18-24	2.0%	1.1%	7%
25-34	7.0%	13.7%	13%
35-44	19.0%	23.7%	13%
45-54	22.0%	20.6%	13%
55-64	26.0%	22.9%	13%
65+	25.0%	17.6%	18%
Religion			
Buddhist	0%	0%	0.3%
Christian	48%	48%	48.8%
Hindu	0%	0%	0.5%
Jewish	2%	3%	5.5%
Muslim	2%	2%	9.9%
Sikh	0%	0%	0.3%
Other Religion	2%	1%	0.3%
No Religion	42%	45%	29.4%
Other	3%	2%	0.3%

Comparing the profile of responses to our census analysis, the outliers are:

- an over representation of White respondents but less than last year and an under representation of Asian / Asian British which is also less than last year.
- Over representation of 35-64 year old age ranges and under representation of 18-24 year old age range (omitting under 18s due to less likelihood of engaging in budget consultations). There has been an increase in responses from the 45-65+ age range compared to last year which indicates an increase in engagement with those age groups.
- In terms of religion, those with no religion over represented and our Jewish and Muslim communities under represented.

By analysing the responses against our census profile, it can indicate the impact of our engagement work around the budget consultation and also provide an indication as to how representative the final outcomes of the consultation are across the whole population.

Consultation analysis by specific characteristic has highlighted:

- Disabled, female and older respondents were less favourable to moving services online than all respondents
- If services were moved online, respondents suggested retaining in person support and phone access for targeted groups
- Disabled respondents also said user experience of online services needed to be improved
- Disabled people and male respondents were less favourable to implementing fees or charges to influence behavioural changes than all respondents
- All characteristics were less favourable about council tax increase but emphasised the need for greater communication of support mechanisms, tools and offsets to reduce any perceived or identified disadvantages
- All characteristics demonstrated support for evidence based spending

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	Disproportionate financial disadvantage due to fixed income – pensioners or younger people	Living Wage increase by 4.1% from April 2026 State pension increase 4.8% Both lower than planned 4.99% CT increase	Residents of Pension Age on a low income will receive Council Tax Support. Unlike Working Age recipients, Pension Age recipients can be awarded up to 100% of their Council Tax liability. Living wage and state pension uplift % is over 75% of the planned CT % Uplift Inflation rate expected to reduce to 2% over the course of this budget period	Neutral
Disability	Disproportionate financial disadvantage due to fixed income	Attendance Allowance increase by 4.17% Benefit cap to remain static in 2026/27	By disregarding disability related benefits and affording further protection for households with a disability, the new Council Tax Support scheme makes additional provision for those with a disability.	Neutral

			Inflation rate expected to reduce to 2% over the course of this budget period	
Gender Reassignment	No impact			
Marriage and Civil Partnership	No impact			
Pregnancy and Maternity	No impact			
Race	No impact			
Religion and Belief	No impact			
Sex	Disproportionate financial disadvantage due to low household income of single parent family – More likely to be a woman	Living Wage increase by 4.1% from April 2026	Working Age residents on a low income can claim up to 80% of their Council Tax liability through Council Tax Support along with support towards rent payments for those in rented accommodation. The new Council Tax Support scheme provides greater support to families Inflation rate expected to reduce to 2% over the course of this budget period	Neutral
Sexual Orientation	No impact			
Carers	Disproportionate financial disadvantage due to low income	Carers allowance to rise by 3.78% Benefit cap to remain static in 2026/27 Attendance allowance to rise by 4.16%	The Council Tax Support scheme provides additional protection to those residents classed as carers. Inflation rate expected to reduce to 2% over the course of this budget period	Neutral
Looked After Children and Care Leavers	Disproportionate financial disadvantage due to low income		Working Age residents on a low income can claim up to 80% of their Council Tax liability through Council Tax Support	Neutral

			along with support towards rent payments for those in rented accommodation. The new Council Tax Support scheme provides greater support to families – including those families containing looked after children. Care leavers receive a full exemption from Council Tax until the age of 25.	
Socio-economically vulnerable	Disproportionate financial disadvantage due to low income	Living Wage increase by 4.1% from April 2026 State pension increase 4.8% Both lower than planned 4.99% CT increase Attendance Allowance increase by 4.17% Benefit cap to remain static in 2026/27	Working Age residents on a low income can claim up to 80% of their Council Tax liability through Council Tax Support along with support towards rent payments for those in rented accommodation. The new Council Tax Support scheme provides increased support for families with children. Council teams will continue to review and evolve the council's welfare support offer, ensuring this is up to date, accessible and inclusive. Living wage and state pension uplift % is over 75% of the planned CT % Uplift Inflation rate expected to reduce to 2% over the course of this budget period	Neutral
Veterans	Disproportionate financial hardship due to low income		Working Age residents on a low income can claim up to 80% of their Council Tax liability through Council Tax Support along with support towards rent payments for those in rented accommodation. The Council has a commitment to not include armed forces compensation	Neutral

			payments or benefit in calculations for Council Tax Support, Discretionary Housing Payments and Discretionary Council Tax payments. Council teams will continue to review and evolve the council's welfare support offer, ensuring this is up to date, accessible and inclusive Council's welfare support offer to be communicated to all staff and members so they can refer residents to support as and when this is needed	

Actions required to mitigate/reduce/eliminate negative impacts or to complete the analysis

2.5 Characteristics	Action	Action Owner	Completion Date
Various	To provide communication to officers and members on the support available, including how residents can access help and officers and members can refer into the service where required.	Chris Brown	2026/27
Various	To continue developing the Council's Welfare offer, ensuring the offer is as inclusive as possible and maximises access to support for our most vulnerable residents.	Chris Brown	2026/27
All	Carry Out EIAs for the following proposals:- Commissioned Services - review of client contribution limit for day services Persona Supported living rate review Reduction of Leisure council subsidy Victoria Family Centre delivery model review Burial vault service fees	Individual owners April 2025	

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	2 - Low Risk

3.3 Reasons for risk level calculation	Whilst it is possible that some individuals will be disproportionately disadvantaged financially by the decisions within the 2026/27 budget report, there are well established systems and processes in place in relation to offering support via various welfare offers, promotion of benefit uptake and relevant support mechanisms.

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	
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	Dawn Burns	30/1/26	
Responsible Asst. Director/Director	Neil Kissock	30/1/26	
EDI	Lee Cawley	02/02/26	QA Complete: The analysis has identified possible negative impacts across several characteristics. These impacts are mitigated through existing and newly developed support systems and projected economic factors which will contribute to reducing the impacts.

			This analysis will be reviewed as the budget progresses

EqIA Revision Log

5.2 Revision Date	Revision By	Revision Details

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Appendix 6

Report of the Chief Financial Officer on the robustness of the 2026/27 Budget Estimates and the adequacy of reserves.

LOCAL GOVERNMENT ACT 2003 – SECTION 25

Introduction

Section 25 of the Local Government Act 2003 requires that, in giving consideration to budget proposals, Members must have regard to the advice of the Council's Chief Finance Officer, currently the Director of Finance, on the robustness of the estimates made for the purposes of the Council's Budget calculations and the adequacy of the General Fund balances and reserves.

The Council must have regard to this report, which is set out below, when making decisions in respect of the Budget. In expressing the opinion, the Section 151 Officer has considered the financial management and control frameworks that are in place, the budget assumptions, the financial risks facing the council and the level of Reserves

Section 25 of the Local Government Act 2003 concentrates primarily on the uncertainties within the forthcoming budget year, however longer-term uncertainties and increasing pressures on the Council's finances also inform consideration of the adequacy of the level of reserves for the medium term.

This report has been prepared against the backdrop of the Code of Practice for Financial Management ('the FM Code') which was introduced by CIPFA in November 2019. The Code clarifies how Chief Finance Officers should satisfy their statutory responsibility for good financial administration as required in section 151 of the Local Government Act 1972

This report has been prepared in accordance with those statutory requirements and covers the following two specific areas:

- Robustness of Budget estimates.
- Adequacy of Reserves.

Both are important in their own right, the first gives consideration to any risks contained with the estimates of the budget being approved and the reserves element ensures consideration is being given to the longer-term financial health of the Council.

Robustness of Budget Estimates

This section will deal with two specific areas:

- The process by which the estimates were produced (to provide assurance to members).
- Potential risks to these estimates and the underlying assumptions.

Process

The estimates contained within the budget have been through a rigorous process which includes:

- Identification of assumptions (on macro issues) using comparison with peer authorities and using external experts to provide advice.
- Estimates for demand for council services have been built up using local service knowledge within the Council and also supported by external experts in the key areas of adults and children's social care.
- The estimates have been produced and owned by the directorates that will be managing the budgets.
- The budget package has been reviewed and signed off by the Council's leadership team.

In developing these estimates careful consideration has been given to:

- The outcome of the 3 year financial settlement which replaces the single year settlements which have become the norm in recent years. Councils have long lobbied for multi-year settlements to provide a greater degree of certainty regarding funding levels and therefore aid financial planning over the medium term.
- The increasing demand for council services, particularly with regard to social care, home to school transport and homeless services.
- The level of inflation at present and going forward – recognising the recent uncertainty.
- The national picture in terms of 'financial viability' of some councils.
- The links between the revenue budget and capital programme in terms of the size of capital programme the Council can afford.

Inevitably given the complexity of the budget for a Council and the uncertainty around demand and inflation particularly there will be a number of potential risks to the position laid out in this budget report. These are set out in the next section.

Risks/variances

This section is concerned with the scale of financial risks faced by the Council as a result of the estimates and assumptions which underpin the budget. The basis of these estimates, as in previous years, relies on the forecast of activity and the impact of changes in policy previously agreed by the Council, and any changes in national policies. These forecasts are kept under review as part of the budget monitoring process and actions identified to address financial risks and capitalise on financial opportunities arising from changes in the forecasts.

The table below demonstrates the scale of just a small variance in the assumptions made, showing the potential impact of both a positive and negative movement of 1% across the main areas within the medium-term financial strategy (the backdrop against which this budget is set):

Sensitivity Analysis	Potential Full Year Impact of 1% Movement £m
Council Tax (level, taxbase and collection rates)	+/- £1.242
Pay Award	+/- £1.046
Real Living Wage	+/- £0.681
Adults Community Care: inflation and demand growth	+/- £1.050
Adults Transition Budget: demand growth	+/- £0.297
Children Looked After Budget: inflation and demand growth	+/- £0.870
Treasury & Capital Financing Costs	+/- £1.383

A number of specific potential risks and opportunities remain within the budget as follows:

- **Government Funding** – there is relative certainty for future years over the level of government funding with the multi-year funding settlement now in place. The funding reform has been described as realigning funding in line with the recognised need for services whilst giving due consideration to a council's ability to raise revenue via council tax, business rates and fees and charges. The local government finance settlement Whilst the settlement was positive overall for the council compared to previous assumptions However, the funding does not increase at the same rate as the current forecast demand, pay award and inflationary pressures.

- **Inflation** – Assumptions have been made for inflation based on latest forecasts. The trajectory has moved upward by circa one percentage point since last year's budget was set. This is an area the Council will need to monitor carefully particularly in its relationship with contractors and their asks for inflationary increases.

- **Pay** – The Council has assumed a 3% increase in pay budgets for 2026/27, up from the 2% previous assumptions due to the increase in overall inflation. There is the possibility that the pay award could be more than this or that it is awarded on a sliding scale that averages more than 3% across the full pay scales.

- **Service Demand** – demand for council services has continued to increase and this is an area the Council will continue to constantly monitor.

- **Interest rates** – The budget currently assumes a 5.25% interest rate for the majority of 2026/27.

- **Delivery of the savings programme** – the 2026/27 budget set out for members includes total savings to be delivered of c£16.2m (including £9.5m of new budget proposals). This is a significant ask and will require continuing regular monitoring and prioritisation from the officer leadership of the Council but the percentage of planned savings delivered has significantly improved following the introduction of the new governance arrangements. Any non or delayed delivery of agreed savings however will worsen the current forecast funding gap if offsetting

mitigations are not identified.

Mitigations in place

The Council has a number of mitigations in place for these risks:

- Governance has been strengthened aligned to the council's improvement plan. A strategic finance board made up of senior officers from all directorates and chaired by the Director of Finance, is responsible for monitoring the in-year revenue budget, including the delivery of agreed savings, and updating and developing the medium-term financial strategy. The board will also drive the production of budget proposals over the spring and summer to address the residual structural funding gap to enable a balanced budget to be set without recourse to reserves over the period covered by the current medium-term strategy.

- In-year financial performance is monitored every month and reported to Cabinet on a quarterly basis. This involves identifying mitigations to address forecast overspends and to factor any ongoing risks and opportunities into the medium-term financial strategy.

- Investment has been agreed by Cabinet to strengthen the corporate procurement team and to improve the systems it uses, and a review of strategic commissioning, procurement and contract management arrangements and the future procurement pipeline is being undertaken to ensure value for money and outcomes are maximised through the council's third-party contracts.

- An exercise has been undertaken to restructure debt where possible and reduce revenue borrowing costs which has been reflected in the budget proposals. Periodic reviews will continue to take place to ensure that benefits are maximised where possible via further debt restructuring and careful consideration of the timing of future prudential borrowing.

- The Council has a budget stabilisation reserve which, at present, 'smooths' the annual financial gap as the Council works towards the delivery of a balanced and sustainable budget going forward. An ongoing review of uncommitted reserves will continue to be undertaken overseen by the Finance Board with a view to replenish the budget stabilisation reserve where possible.

Future developments

A number of associated strategies are managed within the Council which may impact on the Council's overall budget position in the medium term. These will be included as specific sections in future budget reports.

High needs block (SEND) – there is currently a significant deficit on this block and which reflects the national challenge of increasing demand. In response to the

pressures Bury was one of the first councils to enter into a formal Safety Valve agreement on 19 March 2021. The original agreement aimed to eradicate the DSG deficit by the end of the 2024-25. The council has undertaken extensive work in repairing and rebuilding Special Educational Needs and Disabilities (SEND) services within the borough over the last four years as part of the Safety Valve programme which has included rebuilding the Education Health and Care Plan (EHCP) team, reworking the EHCP process and launching a graduated approach.

The work undertaken to date has had a positive impact compared to many other councils who are reporting significant increases in their deficits, however demand pressures remain. This increase in demand has resulted in a necessary change in the deficit reduction profile with the council working with the DfE to agree a revised DSG Management Plan that will remain under close scrutiny and review through the Finance Board and Member Assurance Group.

This is a national issue and one which is being actively monitored and reviewed. At present there is a statutory override which means the Council does not have to fund the deficit. There is no confirmed national solution to this challenge at present, and the override expires at the end of 2027/28, the future of this arrangement is dependent on the outcome of the government SEND reforms. As part of its financial planning the Council holds a DSG reserve which covers these costs. However, going forward if the statutory override is removed the deficit would become a significant financial challenge to the Council. Given the size of the national deficit with the majority of councils forecasting increases in their deficits, it is anticipated that there will be a solution identified by government to address the risks to many council's future financial sustainability should the override be removed.

At this moment the pressures are not reflected in the Council's budget due to the current statutory override.

In addition,

Treasury Management – The Council has a historically successful treasury management strategy. Given the changes to the macro-economic conditions over recent years this strategy will need to be continually monitored to minimise the cost of borrowing and maximise returns on cash balances whilst minimising risk and will be included in future years budget reports.

Major Projects – The Council successfully supports a number of major projects to promote regeneration and economic growth across the borough.

Reserves Strategy

It is important the Council maintains and monitors an appropriate level of reserves in

these challenging times and this needs to be a careful consideration between ensuring sufficient reserves exist for a sustainable financial future against not accumulating reserves at the expense of needing to make decisions in the short term that could be operationally damaging to the Council's ability to provide the services it needs to its residents, service users and other stakeholders.

The Council holds reserves for a number of reasons:

- To enable the Council to deal with unexpected events such as flooding or the destruction of a major asset through fire,
- to enable the Council to manage variations in the demand for or cost of services which cause in year budget pressures, and
- to fund specific projects or identified demands on the budget.

There is no 'right' answer to the question of the appropriate level of reserves for a local authority; this is a matter of judgement taking into account:

- To enable the Council to deal with unexpected events such as flooding or the destruction of a major asset through fire,
- to enable the Council to manage variations in the demand for or cost of services which cause in year budget pressures, and
- to fund specific
- the level of risk and opportunity evident within the budget as set out above,
- a judgement on the effectiveness of budgetary control within the organisation, and
- the degree to which funds have already been set aside for specific purposes which will reduce the need for general reserves.

The Council is forecast to hold c.£48m in reserves in total at 31 March 2026. An element of this (£13m) is earmarked for specific purposes.

In relation to the Council's general reserve (General Fund), the forecast level at 31 March 2026 is £10m. This represents 4.0% of the current net budget. Given the current uncertainty facing the Council in isolation this could be seen as a low level of reserve to hold. However, the Council has a budget stabilisation reserve which acts as a 'safety net' to support the Council developing a sustainable budget over the coming years. The forecast at 31 March 2026 is £17.889m representing 7.1% of the net budget and is broadly equivalent to the level of the forecast funding gap over the next two financial years.

The use of reserves to support the 2026/27 funding gap of £3.977 is c£1.9m lower than the level of reserves required to support the 2025/26 budget which demonstrates progression within the council's financial strategy and has been underpinned by a council wide zero based budgeting programme which has identified almost £10m of new savings proposals for 2026/27.

As the funding gap is forecast to increase in later years of the medium term financial strategy it is therefore critical that work progresses quickly following setting of the

2026/27 budget to identify further budget proposals to reduce and ultimately eliminate the funding gap and requirement for reserve funding to support the revenue budget, and this fundamental priority has been clearly recognised as such by the Executive Leadership Team and Cabinet. Over the next few years, it will also be important to work towards building the general reserve up to a sustainable level as part of the budget plans and reflecting future changes to the level of other reserves and this will be considered as part of the upcoming review of uncommitted reserves.

The CIPFA Financial Resilience Index is a comparative analytical tool that councils, and more particularly Chief Finance Officers, can use to compare the financial position of their respective council to others across various different measures, and help ensure good financial management. This is a tool that will continue to be used to measure the county council's position and is part of the responsibility of the strategic finance board to review and advise members accordingly.

Declaration by Chief Financial Officer

Overall, I can give assurance that the estimates within the budget proposals are sufficiently robust. There are inevitably challenges to producing these over 3 years, but the Council has plans in place to look for further efficiencies and savings to mitigate against any variations to these. The report has outlined the setting up a £2m fund via capital receipt flexibilities to reflect that the council requires sufficient capacity to drive forward service transformation and the identification and delivery of future budget proposals.

There are a number of areas of uncertainty going forward that the Council needs to keep a watchful eye on including most significantly Children's and Adults Social Care demand, SEND / High Needs Block and homelessness services and monitoring is in place to oversee these.

Sufficient governance is in place within the Council through senior officers and members to provide oversight of delivery of the plans contained within this budget.

And finally, the reserves level of the Council are sufficient to manage any risks associated with the proposed budget.

Neil Kissock
Director of Finance and Section 151 Officer

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Agenda Item 8

Classification: Open	Decision Type: Key

Report to:	Overview and Scrutiny (10th February) and Cabinet (11th February)	**Date:** 11 February 2026
Subject:	Draft Walshaw Development Framework	
Report of	Leader and Cabinet Member for Strategic Growth	

Summary

1. The draft Walshaw Development Framework (WDF) sets out the masterplan and phasing strategy for the Walshaw site. This is one of Bury's residential sites allocated through the Places for Everyone Joint Plan (PfE), which was adopted in March 2024.

2. A key requirement of PfE Policy JPA9 is that any proposals within the Walshaw allocation must be in accordance with a comprehensive masterplan that has been approved by the Local Planning Authority and it shall include a clear phasing strategy, as part of an integrated approach to the delivery of infrastructure.

3. The draft WDF establishes the key principles for the development of the site and establishes a framework against which future planning applications on the site will be considered. It sets out high level design principles and an approach to the delivery and phasing of the necessary supporting infrastructure. To give the WDF appropriate planning weight in the decision-making process, it is proposed that it is formally adopted as a Supplementary Planning Document (SPD).

4. Overview and Scrutiny Members are asked to note the content of the Walshaw Development Framework and provide feedback.

5. Cabinet Members are asked to approve the draft WDF for a 6-week period of consultation to establish stakeholder views on its content. Following consultation, all representations received will be fully considered and changes made, where appropriate, before the WDF is brought back to Cabinet for approval to formally adopt it as an SPD.

Recommendation(s)

6. It is recommended that Overview and Scrutiny:

   a. Note the content of the Walshaw Development Framework Supplementary Planning Document (Appendix 1)

b. Provide feedback on the content of the Walshaw Development Framework Supplementary Planning Document (Appendix 1)

7. It is recommended that Cabinet:

i. Approves the draft Walshaw Development Framework Supplementary Planning Document (Appendix 1) as the basis for public consultation for six-week period commencing on 13th February 2026.

ii. Delegates power to the Executive Director of Place to make minor non-material editorial amendments to the draft Walshaw Development Framework Supplementary Planning Document before consultation commences.

Reasons for recommendation(s)

8. To enable stakeholders to have the opportunity to submit comments on the draft Walshaw Development Framework and to comply with the statutory requirements for consultation.

Alternative options considered and rejected

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

Report Author and Contact Details:

Name: Cris Logue
Position: Assistant Director (Strategy, Planning and Regulation)
Department: Place
E-mail: c.logue@bury.gov.uk

Background

10. The Places for Everyone Plan (`PfE') is a joint development plan document of nine of the ten Greater Manchester authorities (excluding Stockport MBC) which was adopted on 21st March 2024.

11. It is a long-term plan for jobs, new homes and sustainable growth which allocates large strategic sites for employment and housing. This includes the residential allocation at Walshaw (PfE Policy JPA9). The site is one of Bury's residential allocations and offers the opportunity to deliver high quality new homes in North Bury.

12. Walshaw will delivery:

- 1,250 new homes
- Affordable housing in line with policy (currently 25% so around 300 affordable homes)
- Specialist and older persons accommodation
- New two-form entry primary school
- New local community and retail facilities to serve the needs of the new residents (and existing residents)
- New through road within the site to provide access throughout the site and enabling active travel movement.
- Off-site highway works to mitigate for the development
- Active Travel network including cycleways and pedestrian links
- Green infrastructure including public open space, sports facilities and playgrounds
- Ecological mitigation and biodiversity net gain.
- Surface water attenuation, SuDS and measures to protect hydrology and water quality

Walshaw Development Framework (WDF)

13. Following its adoption on 21 March 2024, the Places for Everyone Joint Development Plan (PfE) became a key part of Bury's statutory development plan, alongside the saved policies of the Unitary Development Plan (UDP) and the Greater Manchester Joint Minerals and Waste Plans.

14. A key requirement of PfE Policy JPA9 is that any proposals within the Walshaw allocation must be in accordance with a comprehensive masterplan that has been approved by the Local Planning Authority and it shall include a clear phasing strategy as part of an integrated approach to the delivery of infrastructure to support the scale of the whole development in line with PfE Policy JP-D1 'Infrastructure Implementation'.

15. The masterplan requirement is a critical stage in providing a bridge between the allocation of the site in PfE and any subsequent planning consent.

16. Supplementary planning documents (SPDs) build upon and provide more detailed advice or guidance on policies in an adopted development plan. They can be used to provide further guidance for development on specific sites, or on particular issues.

17. As they do not form part of the development plan, SPDs cannot introduce new planning policies into the development plan. However, they are a material consideration in the decision-making process when determining planning applications.

18. The WDF has been prepared by Bury Council with technical input from the Walshaw Consortium as the main site promoter.

WDF Role and Objectives

19. Once adopted, this WDF will establish the key principles for the development of the site and establish a policy/spatial framework against which future specific planning applications on the site will be considered. It will also help Bury Council to ensure that the ambitions for the site are realised and the benefits to the community are maximised.

20. The draft WDF will:

- Establish the vision and strategic objectives for the site, shaped by public consultation, stakeholder collaboration and the Council's ambitions.
- Set out the high-level design and development parameters that all future planning applications within the site will be required to follow;
- Implement a comprehensive and co-ordinated phased master planning approach for JPA9 Walshaw.
- Provide an overarching framework that sets the key development principles and parameters including matters such as land use, access, movement and green infrastructure; and
- Set out a high level approach to the delivery and phasing of on- and off-site infrastructure improvements.

Scope and Content of the draft WDF

21. Chapters 1 and 2 set out the background of the site, the role and purpose of the WDF and the strategic planning context. These chapters include a brief description of the site as well as setting out the key local and national planning policies which any development needs to take into account. The strategic planning context also sets out how the site aligns with other corporate strategies.

22. Chapter 3 provides a detailed analysis of the site, setting out some of the key characteristics, opportunities and constraints. This section includes matters such as transport, ecology, landscape, heritage and community and social infrastructure. It identifies what is currently there as well as opportunities for dealing with any constraints and potential improvements that the development could deliver.

23. Chapter 4 sets out the vision and objectives for the site. The overarching aim is to create a sustainable and cohesive community that successful blends with the existing communities of Tottington, Elton, Lowercroft and Walshaw. This aim is supported by four key strategic objectives to guide future development.

24. Design is addressed in Chapter 5 of the WDF and sets out the design principles for the site. Particularly notable is how the design responds to the

existing landscape ensuing that existing features will be retained and integrated to form a strong green network and high-quality landscape.

25. Chapter 6 brings together the key aspects of the preceding chapters to produce a masterplan for the site. In doing this it sets out how the masterplan proposals apply the vision, objectives and design principles to create the essential elements of a high quality and highly sustainable new place. Key elements of the masterplan includes the new through road, the location of the new local centre and primary school and the strategic green infrastructure network.

26. Chapter 7 sets out a number of development principles for the site. These will inform the parameters for the development of the Walshaw site and should be considered as part of any future planning applications within the stie. The principles are wide ranging and includes matters such as design, highways and access, public transport, active travel, the type of housing (including affordable housing), open space, education provision, green and blue infrastructure, flood risk and drainage.

27. Chapter 8 deals with phasing, infrastructure and delivery. This chapter sets out they key issues in terms of phasing and infrastructure and how they should be considered in the delivery of the site. An Infrastructure, Phasing and Delivery Strategy will be produced alongside the WDF. However, as this strategy is likely to be updated regularly to reflect new information and available funding, it is proposed that is not included within the WDF but is instead a separate 'living' document produced in collaboration with key stakeholders. The Council will work with all partners to bring forward the strategic infrastructure and this may include the Council (or other public sector bodies potentially using its statutory land assembly powers to enable or facilitate the delivery of this major opportunity.

28. Chapter 9 addresses the importance of embedding an approach to sustainable development in delivering the site. This is necessary to meet Greater Manchester's ambition to become a carbon neutral city region by 2038, supported by the declaration of a climate emergency.

29. Chapter 10 and 11 set out the key benefits that are expected to be realised from the development. Chapter 10 deals with the general economic, social and environment benefits, whilst Chapter 11 has a specific focus on social value.

30. Chapter 12 commits to a review of the WDF should there be a change in circumstances which would have implications for the guidance provided in the document.

Consultation and Adoption

31. In preparing this draft WDF, there has been early engagement with a range of stakeholders. This has been crucial in gaining valuable information about the long-term aspirations for the site and the infrastructure required to deliver the full potential of the site. Dialogue will continue through the consultation process to help shape any revisions to the WDF before it is brought back to Cabinet for formal approval/adoption, once the consultation process has concluded.

32. As an SPD, the WDF is being prepared in accordance with the statutory framework set out in 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 a Strategic Environmental Assessment or Habitat Regulation Assessment is required. The outcomes of the screening opinion will be published alongside the draft WDF.
- Made available for public consultation for a 4-week minimum period.
- Made available for inspection, at a Council's principal office and at other places within its area as the Local Planning Authority consider appropriate, during normal business hours.
- Made available as an online copy.

33. The WDF will be prepared in accordance with the statutory framework and the regulations cited above. The Council's website will be used as the main point of contact for the formal consultation. The WDF online consultation will be promoted via social media (Facebook and X) to raise awareness of the proposals and to issue reminders of the consultation closing date. These should direct residents to the formal consultation website.

34. Printed copies of the WDF will also be placed in key public buildings (Town Hall and libraries) to allow members of the public to participate in the consultation process.

35. Publicity materials including posters will be located at key locations to signpost residents to the on-line information or to view proposals in person.

36. Direct contact via letters or email will be made with consultees registered on the Consultation Database (around 2,500 contacts).

37. Residents and businesses will also be able to view and discuss the proposals with Council officers at drop in sessions being held on:

- Tuesday 24th February – Radcliffe Market - 4-8pm
- Wednesday 25th February – Elton High School - 4-8pm
- Thursday 26th February – Parrenthorn High School – 4-8pm

Council land interests

26. Members should note that, within the site, the Council holds freehold ownership of an 8.72-acre site. The Corporate Asset and Facilities Management team will actively collaborate with land promoters and agents to progress this land for development. Any future disposal of Council-owned land within the site allocation will require a separate Cabinet report and will be subject to the usual principles of land disposal.

Next steps

38. It is proposed that consultation on the draft WDF takes place for at least six weeks commencing in January 2026.

5.1 This would allow for consideration of comments received and for any amendments to the WDF to be made before the final version is taken back to Cabinet for formal approval/adoption of the WDF in summer 2026.

Links with the Corporate Priorities:

Please summarise how this links to the Let's Do It Strategy.

39. 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 'Lets 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:

40. An EIA analysis has identified potential impacts across some characteristics which will require consideration of mitigations as the development progresses. The EqIA will require update and revision as this development progresses

There are no outstanding equalities concerns at this stage

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*** *(contact c.m.wilkinson@bury.gov.uk for advice)*

41. Environmental impacts and concerns will be assessed and monitored as project delivery commences and will be in-line with existing Council policies.

The Walshaw Development Framework will seek to meet policy requirements, including physical, social and environmental impacts including biodiversity net gain.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
Stakeholders to not engage in the consultation on the draft Supplementary Planning Document.	The draft 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 the Council's 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:

To be completed by the Council's Monitoring Officer.

42. The draft SPD has been prepared in accordance with the Planning and Compulsory Purchase Act 2004 and the Town and Country Planning (Local Planning) (England) Regulations 2012.

43. The recommendations within the report to publish the draft SPD for consultation prior to consideration of responses and potential future adoption by the Cabinet is within the legal powers of the Council.

Financial Implications:

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

44. There are no financial implications arising directly from the drafting and adoption of the Walshaw Development Framework. The Framework has been developed by Planning Services staff funded from existing approved budget allocations. Any costs relating to the consultation process will also be covered within existing approved budget allocations.

Appendices:

Appendix 1 – Walshaw Development Framework Consultation Draft Supplementary Planning Document

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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
SPD	Supplementary Planning Document
PfE	Places for Everyone Joint Development Plan
WDF	Walshaw Development Framework

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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	Draft Walshaw Development Framework Supplementary Planning Document
Lead Officer (SRO or Assistant Director/Director)	Cris Logue
Department/Team	Business, Growth and Infrastructure
Proposed Implementation Date	24th October 2025
Author of the EqIA	Fran Smith
Date of the EqIA	16th October 2025

1.1 What is the main purpose of the proposed policy/project/decision and intended outcomes?

Draft Walshaw Development Framework (WDF) Supplementary Planning Document (SPD) supports Policy JPA9 of the Places for Everyone Joint Plan (PfE) which was adopted in March 2024.

The draft WDF establishes the key principles for the development of the Walshaw site and establishes a framework against which future planning applications on the site will be considered, sets out high level design principles and an approach to the delivery and phasing of infrastructure. In order to give the Framework additional planning weight in decision making, it is proposed that it is adopted as a Supplementary Planning Document (SPD).

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The WDF provides a clear vision for the delivery of the Walshaw site. However, if circumstances change and have implications for the vision, design and development principles set out in the WDF, then a review of this document will be appropriate.

It is proposed that the draft SPD is subject to at least a six-week period of consultation in order to establish stakeholder views on its content.

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 Walshaw SPD will not affect any employees based on a protected characteristic(s) they have. Staff will be guided in their work, in line with national guidance and the council's strategic aims, enabling them to provide the public with the best possible level of service.

Community/Residents: **Yes.** A key part of the PfE, including the Walshaw site, 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 WDF sets out how Walshaw will contribute.

It is anticipated that it could take up to 15 years to deliver the Walshaw site. The WDF provides a high-level strategy and key principles for the delivery of Walshaw, whilst retaining flexibility to allow for opportunities across the site. The potential impacts of delivering individual parcels of development within the site will be considered as detailed delivery information becomes more available.

Third parties such as suppliers, providers and voluntary organisations: **Yes** – PfE and the Walshaw SPD will provide careful and detailed advice towards ensuring high quality development within the Walshaw allocation.

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:

PfE has been subject to an Integrated Assessment (which included an Equality Impact Assessment) and this can be viewed at mdc8-appendix-a-eqia-2023.pdf

Data:

Places for Everyone has already been through the Equality Impacts Assessment (EqIA) process at the relevant stages of development. The SPD expands on policies within Places for Everyone which has already been through the Sustainability Appraisal (SA) process at various stages of its development, where identified social, economic and environmental considerations have been established and assessed as part of the plan making process.

In addition to the SA, Places for Everyone is also supported by a robust and extensive evidence base, that has been tested through the examination process by independent Planning Inspectors.

Given the above, the most relevant information at this stage is the extensive range of evidence used in support of the development and examination of Places for Everyone, available to view at Places for Everyone Joint Development Plan and supporting evidence

Stakeholder information/consultation:

The SPD will be subject to at least a six-week public consultation prior to adoption. Full consideration will be given to all the responses received as part of the consultation exercise. Amendments to the draft SPD will be made where necessary. Outcomes from the public engagement will be set out within a Consultation Statement.

Ongoing dialogue has been carried out with internal officers and stakeholders throughout the preparation process for the draft SPD and no issues concerning equality and community cohesion have been raised as a result of these consultations. It is proposed that, following the public consultation, a further version of the Walshaw SPD will be brought back to Cabinet for formal approval.

If a review of the WDF is appropriate, the scope and content of the updated SPD would be subject to a proportionate statutory and/or public/stakeholder consultation prior to being finalised. This EqIA would be updated to reflect any amendments to the WDF.

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	Different age groups have different housing and employment needs, which directly impact on how and when they choose to live.	The SPD includes proposals that will bring positive housing benefits to the young and old. As of 31 March 2024, there were 2,211 households on the housing register seeking affordable housing in the Borough and PfE requires development in the Walshaw allocation to include affordable housing provision within which will help younger, first-time	The SPD is intended to apply to all age groups. It supports the provision for a range of housing including extra care and supportive living. Social uses such as retail, health, education facilities and public transport hubs are to be co-located to ensure	Neutral

		buyers get onto the property ladder. In addition, recent population projections indicate that there is likely to be a significant increase in the number of people aged over-65. The Housing Need and Demand Assessment (2020) estimates that there will be a need for an additional 578 units of specialist older person (planning use class C3) and 518 units of residential care (use class C2) from 2020-2037. There is expected to be an increase of around 403 dwellings needing major adaptation by 2030 to meet the needs of people illness or disability. This population changes are likely to present some challenges in terms of ensuring specific housing and care requirements of these groups can be met, and sufficient accommodation will have to be delivered to meet these needs. The SPD includes provision of a retirement village for older people, maximising their ability to live independent lives and retain control over their accommodation and services.	that all ages groups can access.	

		Public consultation methods will be designed to ensure all ages groups are engaged for example the use of leaflets, social media and drop in events.		
Disability	Different disability groups have different housing and employment needs, which directly impact on how and when they choose to live.	The SPD includes proposals that will bring positive housing benefits to all disabled groups The Housing Need and Demand Assessment (2020) estimates that there will be a need for an additional 578 units of specialist older person (planning use class C3) and 518 units of residential care (use class C2) from 2020-2037. There is expected to be an increase of around 403 dwellings needing major adaptation by 2030 to meet the needs of people illness or disability. This population changes are likely to present some challenges in terms of ensuring specific housing and care requirements of these groups can be met, and sufficient accommodation will have to be delivered to meet these needs. The SPD includes provision of extra care accommodation, maximising residents ability to live independent lives and retain control over their accommodation and services.	The SPD is intended to apply to all disability groups. It supports the provision for a range of housing including extra care and supportive living. Social uses such as retail, health, education facilities and public transport hubs are to be co-located to ensure that all disabled groups can access.	Neutral

		Additional requirements and guidance on design within the Walshaw allocation should ensure improved access for less mobile people. Public consultation methods will be designed to ensure that key stakeholders, community groups and residents are engaged to ensure an inclusive approach.		
Gender Reassignment		There is no evidence that there will be a differential impact based on gender reassignment.		Neutral
Marriage and Civil Partnership		There is no evidence that there will be a differential impact based on marital or civil partnership status.		Neutral
Pregnancy and Maternity	Neutral	See above		
Race		There is no evidence that there will be a differential impact based on Race.		Neutral
Religion and Belief		There is no evidence that there will be a differential impact based on Religion on Belief.		Neutral
Sex		There is no evidence that there will be a differential impact based on the sex of a person.		Neutral
Sexual Orientation		There is no evidence that there will be a differential impact based on the sex orientation of a person.		Neutral

Carers		There is no evidence that there will be a differential impact for carers.		Neutral
Looked After Children and Care Leavers	Looked after children and care leavers may not be able to access open market housing	As of 31 March 2024, there were 2,211 households on the housing register seeking affordable housing in the Borough and the Plan includes a policy	PfE includes a policy requiring affordable housing provision within new residential development which will help younger, first-time buyers and socio-economically vulnerable residents get onto the property ladder. Development in the Walshaw allocation will include affordable housing in line with PfE.	Neutral
Socio-economically vulnerable	Socio-economically vulnerable residents may not be able to access open market housing.	As of 31 March 2024, there were 2,211 households on the housing register seeking affordable housing in the Borough and the Plan includes a policy	PfE includes a policy requiring affordable housing provision within new residential development which will help younger, first-time buyers and socio-economically vulnerable residents get onto the property ladder. Development in the Walshaw allocation will include affordable housing in line with PfE.	
Veterans		There is no evidence that there will be a differential impact on Veterans.		Neutral

Actions required to mitigate/reduce/eliminate negative impacts or to complete the analysis

2.5 Characteristics	Action	Action Owner	Completion Date
	EqIA to be updated following consultation to reflect the results of the consultation	Fran Smith	

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	0
3.3 Reasons for risk level calculation	Equalities impacts identified are all positive or will not affect other groups of people with protected characteristics. The type of development outlined in the document will benefit groups with protected characteristics including age and disability. Other groups with protected characteristics will not be negatively impacted by the SPD.

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	X	The WDF seems to ensure that Walshaw provides new homes and infrastructure for all future residents and employees and reduce the risks of negative impacts on local communities.
There are low impacts or risks identified which can be mitigated or managed to reduce the risks and activity will proceed		
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	Fran Smith	16/10/2025	
Responsible Asst. Director/Director	Cris Logue	16/10/2025	

EDI	L. Cawley	11/12/25	QA Complete: The analysis has identified potential impacts across some characteristics which will require consideration of mitigations as the development progresses. The EqIA will require update and revision as this development progresses

EqIA Revision Log

5.2 Revision Date	Revision By	Revision Details
		This EqIA will be continually reviewed and updated as the WDF develops. Further information will be considered when detailed deliver information becomes available.

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WALSHAW DEVELOPMENT FRAMEWORK

JPA9
Supplementary Planning Document

February 2026





Bury Council

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Bury Council

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FOREWORD

The recently adopted Places for Everyone Joint Development Plan allocates the Walshaw site for up to 1,250 new homes. It will create a new sustainable and cohesive community that seeks to successfully blend with the existing communities of Tottington, Elton, Lowercroft and Walshaw.

The Walshaw Development Framework will guide the future development of the Walshaw site, establishing a clear vision and set of principles to ensure that growth is planned, co-ordinated, and delivered to specific standards.

This framework seeks to create a high-quality residential environment that is sustainable, inclusive, and well-connected. Central to this is the integration of green spaces, offering accessible open space that promotes health and wellbeing. Additionally, a network of active travel routes will encourage walking and cycling, reducing reliance on vehicles and supporting a low-carbon future.

The development will be supported by new highways, bus services and social infrastructure, including education, and community facilities, ensuring the needs of residents are met in the longer term.

Bury Council is pleased to present the Walshaw Development Framework which set outs out how the Walshaw site can be shaped into a vibrant neighbourhood that creates a lasting legacy for future generations. This framework will guide consideration of future planning applications.



"The Walshaw Development Framework sets out a clear vision for creating a sustainable, well-connected community of up to 1,250 new homes. This is about more than housing - it's about blending new development with existing neighbourhoods, integrating green spaces, and providing the infrastructure needed to support future generations." - Councillor Eamonn O'Brien, Leader of Bury Council and Cabinet Member for Strategic Growth

1.INTRODUCTION

This Development Framework has been prepared in accordance with Places for Everyone (PfE) Policy JP Allocation 9 Walshaw with the purpose of guiding development across the allocation.

The site at Walshaw was allocated for residential development under Policy JP Allocation 9 (JPA 9) of Places for Everyone (PfE), a joint Development Plan Document (DPD) guiding development across nine authorities (including Bury) in Greater Manchester. JPA9 requires proposals for the site to be in accordance with a comprehensive masterplan that has been approved by Bury Council and to include a clear phasing strategy as part of an integrated approach to the delivery of infrastructure to support the scale of the whole development.

This Development Framework has been informed by a range of technical studies and prepared having full regard to relevant planning policy and supporting guidance (including the National Design Code) as well as the policies contained PfE.

The Council has published further guidance, in Supplementary Planning Document (SPD) 18, on what the Council expects to see within future masterplans and phasing strategies for the Walshaw site. This Walshaw Development Framework (WDF) fulfills the requirements of Policy JPA9 and SPD18.

The Walshaw Development Framework (WDF) has been prepared as a Supplementary Planning Document (SPD) by Bury Council and will, whilst not forming part of the statutory development plan, carry planning weight as a material planning consideration in the determination of future planning applications on the site.

This SPD document does not introduce new planning policies in the Development Plan but provides detailed guidance on the policies in PfE to ensure that the vision for the allocation is fulfilled throughout the lifetime of the development process and that development and infrastructure come forward in a planned and comprehensive manner.

This draft WDF has been prepared in a collaborative manner, with engagement undertaken with landowners, key stakeholders and statutory consultees. Bury Council welcome feedback on the draft WDF during this period of consultation and will set out how the feedback received has been included into a final draft of the document – which will be considered by the Council's Cabinet prior to its formal adoption.

The remainder of this section sets out the site context, purpose and status of the WDF. The WDF provides planning guidance and a masterplan which is intended to be indicative only and retain flexibility to allow planning applications to respond to design, site constraints and future market conditions.

FIGURE 1: SITE LOCATION PLAN



THE SITE

The site is situated in a sustainable and well-connected location, set entirely within the existing urban area. It is located within walking distance of local shops, services and infrastructure within 2.5km of Bury Town Centre and 15km of Manchester City Centre.

The site extends to approximately 64ha. The site is bound by the urban areas of Tottington to the north, Woolfold and Elton to the east, Lowercroft to the south and Walshaw to the west.

The site is mainly in agricultural or pastoral use and contains a reservoir fed by Walshaw Brook. The Bolholt Hotel, Stables Country Club, and Lake Hill private residence are situated adjacent to the reservoir. There are a large number of mature trees and significant hedgerows within and along the site boundary.

Walshaw Brook runs through the northern part of the site, flowing in a south easterly direction. There are numerous tributaries that drain at various locations along its length. Elton Brook runs to the south of the site.

FIGURE 2: SITE LOCATION PLAN



PURPOSE OF THE DEVELOPMENT FRAMEWORK

The primary purpose of the Walshaw Development Framework (WDF) is to support the delivery of JPA9.

This WDF sets out an overarching vision for the site, summarises the background analysis and engagement that has been undertaken, outlines the design principles which have informed the production of the illustrative masterplan and a phasing and delivery strategy.

The principal objective of this framework is to bring forward a coherent Masterplan for JPA9 which identifies a deliverable quantum of residential development alongside the transport, social, and green infrastructure required to support delivery required by planning policy.

The preparation of the WDF and its supporting evidence has enabled key issues to be identified at an early stage in the planning process. These have informed spatial parameters against which future planning applications will be considered, and helped to identify the necessary infrastructure required to support the development of the site.

The WDF sets out a high-level approach to the phasing of the development. An Infrastructure, Phasing and Delivery Strategy will provide further detail on phasing and the infrastructure that is expected to accompany the development of homes.

The WDF does not grant planning permission for any aspect of the development. Approval will be sought through the submission of individual planning applications which the Council will consult upon and determine in the normal way. All applications within Walshaw site will be expected to be accompanied by evidence to show how they have taken account of the WDF; are consistent with the site-wide vision and design principles; and will make fair and proportionate contributions to necessary infrastructure.

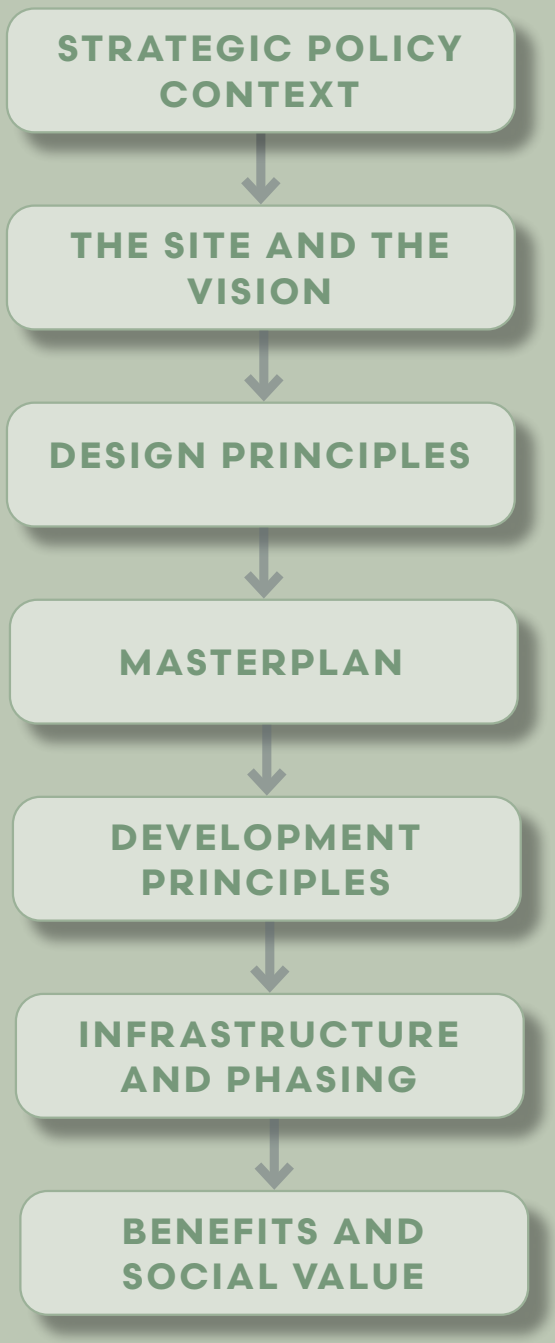
ROLE AND OBJECTIVES

The role of the WDF is to establish the key principles to guide the development of the site and to inform future planning applications. This will enable the Council to ensure that the vision of the site is realised and the new benefits to the local communities are maximised.

The objectives of this WDF are to:

- Establish the vision and strategic objectives for the site, shaped by public consultation, stakeholder collaboration and the Council's ambitions.
- Set out the high level design and development parameters that all future planning applications within the site will be required to follow;
- Implement a comprehensive and co-ordinated phased masterplanning approach across JPA9 Walshaw;
- Provide an overarching framework that sets the key development principles and parameters including matters such as land use, access, movement and green infrastructure.
- Set out a high level approach to the delivery and phasing of on and off-site infrastructure improvements and the broad locations for site wide infrastructure requirements such as education, highways, green infrastructure and flood risk.

DEVELOPMENT FRAMEWORK STRUCTURE



2.STRATEGIC POLICY CONTEXT

The WDF is prepared in accordance with relevant aspects of the development plan; Bury's and Greater Manchester's economic and transport strategies; and national planning policy. This policy context is summarised below. Policies of most relevance to particular topics are identified in Section 7.

BURY'S DEVELOPMENT PLAN

Bury's statutory development plan currently comprises:

- Places for Everyone Joint Development Plan (adopted March 2024);
- The Greater Manchester Joint Minerals Plan (adopted April 2013);
- The Greater Manchester Joint Waste Plan (adopted April 2012); and
- The saved policies of the Unitary Development Plan (adopted August 1997).

Places for Everyone

Places for Everyone is a long term joint development plan for nine Greater Manchester authorities (Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Stockport, Tameside, Trafford and Wigan) for new homes, new jobs and sustainable growth'.

PfE will guide development in the city region through to 2039 and provide a strategic framework for the production of local plans by individual local authorities.

To deliver sustainable and inclusive growth across Greater Manchester, Places for Everyone includes a spatial strategy. A strategic objective of the spatial strategy relates to boosting the competitiveness of the northern districts by ensuring they meet their own local housing need through the delivery of strategic allocations such as Walshaw in the authority of Bury.

PfE Policy JPA9 Walshaw

Development at the Walshaw Site is guided by Policy JPA9. Policy JPA9 sets out the policy requirements to ensure development is delivered which, together with other relevant development plan policies, seek to ensure this takes place in a sustainable and coherent manner, whilst maintaining the amenity of existing residents and business in the surrounding area. Any proposals for the allocation must be in accordance with a comprehensive masterplan that has been approved by the local planning authority.

The allocation requirements have been listed in the table opposite.

BURY UNITARY DEVELOPMENT PLAN

The saved policies of the Bury UDP have also been taken into account. They will be taken into account in considering planning applications until they are replaced by the policies of the emerging Bury Local Plan.

BURY DRAFT LOCAL PLAN

Bury Council is preparing a new Local Plan building on the strategic framework established in PfE. While PfE sets out the overarching vision and strategic policies for growth and development across the plan area Bury's Local Plan focuses specifically on Bury's needs, challenges, and opportunities.

Bury Council consulted on a draft Local Plan between March and May 2025 and is currently considering the representations received.

The draft Local Plan includes a comprehensive set of locally specific planning policies that provide detailed guidance on a range of issues, including housing, employment, environmental protection, heritage, infrastructure, and design. It also identifies local designations that are essential to guiding development and protecting important assets within the borough.

Future planning applications within the masterplan area will be considered against the relevant adopted and emerging Local Plan policies.

JPA9 ALLOCATION TABLE

NO.	Cross check with JPA9 Policy
01	Any proposals for this allocation must be in accordance with a comprehensive masterplan that has been approved by the LPA. It shall include a clear phasing strategy as part of an integrated approach to the delivery of infrastructure to support the scale of the whole development in line with Policy JP-D1 'Infrastructure Implementation'
02	Deliver a broad mix of around 1,250 homes to diversify the type of accommodation in the Walshaw area. This includes an appropriate mix of house types and sizes, accommodation for older people, and provision of plots for custom and self-build housing
03	Make provision of a new strategic through road to enable an alternative to Church Street, Bank Street and High Street that is designed to be suitable for buses and incorporates active travel and is in line with local design standards
04	Make provision for a network of safe cycling and walking routes through the allocation linking neighbourhoods with key destinations, incorporating Leigh Lane and Dow Lane.
05	Make provision for other new and improved sustainable transport and highways infrastructure having regard to the indicative transport interventions set out in Appendix D in accordance with Policy JP-C8
06	Make provision for affordable housing in accordance with local planning policy requirements, equivalent to at least 25% of the dwellings proposed on the site and across a range of housing types and sizes (with an affordable housing tenure split of 60% social or affordable rented and 40% affordable home ownership)
07	Make provision for a new one-form entry primary school and make financial contributions for off-site additional secondary school provision to meet needs generated by the development in accordance with Policy JP-P5
08	Make provision for a new local centre in an accessible location which includes a range of appropriate retail, health and community facilities required to serve purely local needs and ensure that it is integrated within existing communities
09	Ensure the design and layout allows for effective integration with surrounding communities, including active travel links and connections to the recreation areas at Dow Lane, Elton Vale, Whitehead Lodges as well as Walshaw Village and Bury Town Centre
10	Make provision for new, high quality, publicly accessible, multifunctional green and blue infrastructure within the allocation including the integration and enhancement of the existing green infrastructure corridors and assets at Walshaw and Elton Brooks.
11	Make provision for compensatory improvements to the environmental quality and accessibility of remaining Green Belt in the vicinity of the site in accordance with Policy JP-G2
12	Define and/or strengthen the boundaries of the Green Belt to the south-east of the site such that it will comprise physical features that are readily recognisable and likely to be permanent
13	Take appropriate account of relevant heritage asset, and their setting, including the Christ Church Grade II* Listed Building, in accordance with Policy JP-P2
14	Consider the extraction of any viable mineral resources within mineral safeguarding areas, in accordance with Policy 8 of the Greater Manchester Joint Minerals Development Plan (or any relevant policies in subsequent minerals plans).

SUPPLEMENTARY PLANNING DOCUMENTS

The Council has adopted a number of SPDs to provide more detailed guidance on the implementation of a range of development plan policies. These are a material planning consideration and will be taken into account in considering planning applications within the masterplan area.

SPD18 "Development Frameworks for Strategic Site Allocations at Elton Reservoir and Walshaw" (April 2025) draws on the toolkit prepared by the Local Government Association and Planning Advisory Services for "The Effective Delivery of Strategic Sites" and provides more detailed guidance on the delivery of the Elton Reservoir and Walshaw allocations.

The WDF has been prepared in accordance with guidance within SPD18 including in relation to:

- Collaborative working between the Council, landowners/ developers and key stakeholders on the form of development and approaches to its funding;
- Ensuring that the proposed development fulfils the vision and objectives that justified removal from the Green Belt;
- Making clear the evidence on which the proposed approach is based;
- Demonstrating a comprehensive approach to delivery across the whole site;
- Identifying strategic issues at an early stage and showing how they will be addressed in ways that are consistent with relevant planning policies;
- Establishing development parameters against which future planning applications will be considered; and
- Undertaking effective community and stakeholder engagement as part of the formulation of proposals and delivery of development.

NATIONAL POLICY AND GUIDANCE

The National Planning Policy Framework (December 2024) ('the NPPF') sets out the Government's planning policies for England and how these are expected to be applied, including guidance for planmaking and decision making. It confirms that in order to achieve sustainable development, the planning system has three overarching interdependent objectives, including:

- An economic objective – to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure;
- A social objective – 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; and
- An environmental objective – to protect and enhance our natural, built and historic environment; including making effective use of land, improving biodiversity, using natural resources prudently, minimising waste and pollution, and mitigating and adapting to climate change, including moving to a low carbon economy.

Paragraph 130 of the NPPF states that: *'Area-based character assessments, design guides and codes and masterplans can be used to help ensure that land is used efficiently while also creating beautiful and sustainable places...'*

The NPPF is supported by Planning Practice Guidance (PPG) which states that:

'Masterplans set the vision and implementation strategy for a development. They are distinct from local design guides by focusing on site specific proposals such as the scale and layout of development, mix of uses, transport and green infrastructure.' Paragraph: 006 Reference ID: 26006- 20191001).

BURY 2030 STRATEGY 'LET'S DO IT'

In July 2020, Bury Council and NHS Bury Integrated Care Partnership launched an ambitious community strategy 'LET'S Do It'. This sets out a vision that by 2030 the borough of Bury will stand out as a place that is achieving faster economic growth than the national average with lower than national average levels of deprivation.

The Bury 2030 Strategy seeks to build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity. The proposed housing at Walshaw complements this objective.

BURY HOUSING STRATEGY 2021-2025

The Councils housing strategy sets out intended outcomes from the Councils holistic approach to housing in the Borough. These include delivering more homes in the borough, increasing affordable housing supply and a more dynamic housing market. As set out above the allocation of Walshaw through PfE supports these objectives.

GREATER MANCHESTER TRANSPORT STRATEGY 2040

The Greater Manchester Transport Strategy 2040 sets out that Greater Manchester's long-term ambition for transport, with a vision for the city region to have "world-class connections that support long-term sustainable economic growth and access to opportunity for all".

The Strategy sets out a strong commitment to provide a transport system which supports sustainable economic growth and the efficient and effective movement of people and goods; improves the quality of life for all by being integrated, affordable and reliable, protects the environment and supports the target to be net zero carbon by 2038 as well as improving air quality and capitalising on new technology and innovation.

It sets a vision, referred to as the 'right mix vision' that 50% of all journeys in Greater Manchester are made by walking, cycling and public transport by 2040. This will mean one million more sustainable journeys every day enabling the delivery of healthier, greener and more productive city region.

The provision of high quality bus services and fully integrated active travel connections ensure that development at Walshaw will be consistent with these objective.

BURY LOCAL TRANSPORT STRATEGY

The Bury Local Transport Strategy was approved by the Council in October 2023 and sets out a plan for transport investment in Bury for the next 20 years and beyond. It covers all modes of travel. The strategy aligns with the LET'S Do It vision for Bury and the Greater Manchester Transport Strategy 2040 and will be used to help secure transport investment into the Borough.

The Strategy seeks to link residents to new opportunities and to deliver the Council's inclusive growth ambitions by connecting people to jobs, education, leisure and tourism.

3.UNDERSTANDING THE SITE

SITE HISTORY

This section provides analysis of the morphological change of the site, allowing insight into how the site has formed.

1800-1880

Throughout the early and mid 1800's Walshaw saw development clustered around Walshaw village and ribbon development along key roads leading to Bury.

1880-1920

Between 1880 and 1920 sporadic ribbon development began to take shape along key arterial roads. Christ Church was finished in 1888. Houses and farms were also built along the reservoir.

1920-1940

From the 1920's into the 1940's more established communities formed around the site, predominately in Tottington and Walshaw village centre.

1940-1970

1940 - 1970 saw expansion of Walshaw village centre and ribbon development continue along Walshaw Road, Lowercroft Road and Tottington Road. This development has bound the site forming an enclosed area of urban countryside.

DEVELOPING THE SITE

There is a unique opportunity to better connect these existing communities, through the preservation and enhancement of the current landscape features allied with the creation of new modern residential development to form new neighbourhoods with high quality amenity and open space.



FIGURE 3: 1800'S



FIGURE 4: 1800'S-1920S

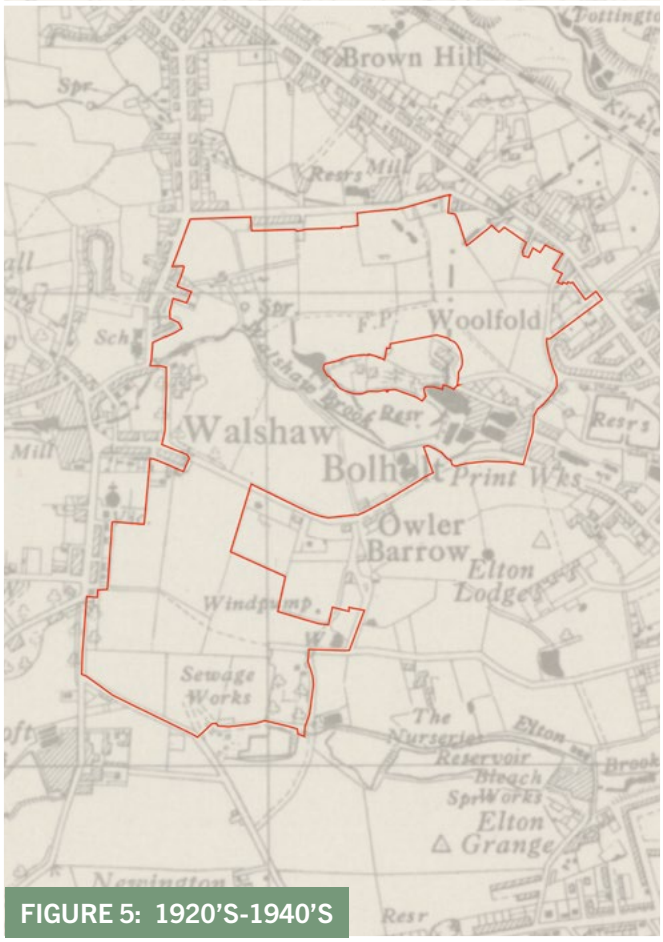


FIGURE 5: 1920'S-1940'S



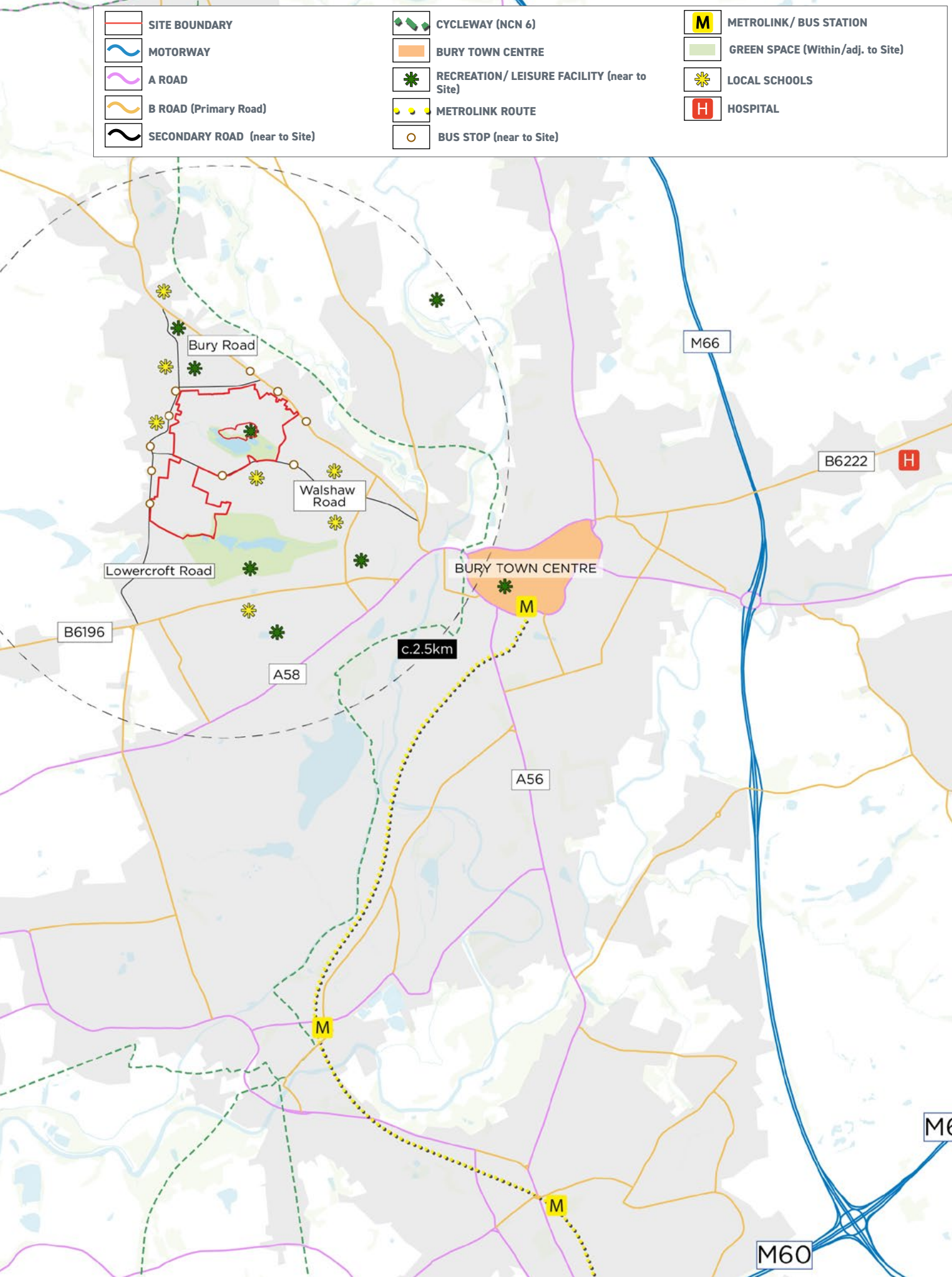
FIGURE 6: 1940'S - 1970'S

THE SITE TODAY

This site is strategically well-located to deliver a new sustainable community and is accessible to:

- Bury Town Centre, which is located c.2.5km from the site.
- Bury Metrolink which is located in Bury Town Centre offers services every 12 minutes to nearby neighbourhoods, settlements and Manchester City Centre.
- Existing bus services, currently operate along Walshaw Road, Lowercroft Road, High Street, Church Street and Bury Road/ Tottington Road, offering connectivity to Tottington District Centre (c.1km) and Bury Town Centre.
- Tottington District Centre and Walshaw Village Centre (c.200m) to the west.
- The strategic road network including several B-Roads, the A58 and the M66.
- Shops, services and employment opportunities in Bury Town Centre.
- Existing Public Rights of Way, and National Cycle Network (NCN) Route 6.
- Nearby primary and secondary schools.
- Leisure facilities, including Stables Country Club, Bury Leisure Centre and other town centre facilities.
- Accessible recreation facilities at Dow Lane Recreation Ground, Elton Vale Sports Club, Walshaw Sports Club and Elton Cricket Club.
- Areas of green space within and close to the site (centred around the reservoirs at Bolholt Country Park Hotel, Elton Vale Kirklees Valley and Burrs Country Park).

FIGURE 7: STRATEGIC OPPORTUNITY PLAN



LOCAL CONTEXT AND CHARACTER

The site is mainly in pastoral or agricultural use and contains a reservoir fed by Walshaw Brook. The Bolholt Hotel, Stables Country Club, and Lake Hill private residence are situated adjacent to the reservoir. There are a large number of mature trees and significant hedgerows within and along the site boundary

Bury Town Centre, is located approximately 2.5km from the site and offers a full range of retail, cultural and leisure amenities alongside local education provision and health and community facilities.

Tottington District Centre is located approximately 1km from the site and includes convenience stores, library, post office and other local services.

A convenience store is located in Walshaw Village Centre, located approximately 800m from the site.

The site is relatively well-served with community centres including the Tottington Centre and Elton Community Centre,

The site is in good proximity to many educational establishments serving all ages including Elton High School and Tottington High School, Christ Church Walshaw, Lowercroft Primary School, Chantlers Primary School, Tottington Primary School and Elton Primary School

There are several GP surgeries close to the site including Tottington Health Centre and Mile Lane Health Centre.

There are opportunities to provide new, more accessible local facilities on site and meet the needs generated by future residents without creating the need to travel by car.

There is an opportunity to provide a new primary school on the site and utilising/expanding capacity within existing nearby schools and health centres.



Walshaw Village Centre



Christ Church, Walshaw



FIGURE 8: LOCAL FACILITIES PLAN



LOCAL CHARACTER

TOTTINGTON

Predominately 2 - 2.5 storey semi detached suburban block with historic terraces along Bury Road. The area shows consistent character including: symmetrical frontage, dominant red and light brick, dark clay roof tiles, exposed cills. Boundary treatments are largely stone or brick low walls in combination with hedges.





WALSHAW VILLAGE

Housing ranges from 2 - 2.5 storey semi detached and terraces along High Street. Characteristics of the area include: larger plots, red brick and light coloured render. Boundary treatments include: low fence or brick wall and hedgerows. Parking along terraces is on street with on plot front and side parking in the more modern suburban developments.

WOOLFOLD

Woolfold features predominately 2 to 2.5 storey semi-detached and terraced properties, arranged along the main routes and secondary streets within the neighbourhood. Characteristics of the area include: red brick, generous plot size and; light coloured render. Boundary Treatments include: low brick walls, timber fencing and established hedgerows. Parking provision varies with on-street parking typical for older terraces on-plot parking in newer suburban developments.





ELTON

Housing in Elton ranges from 2 - 2.5 storey semi detached and terraces along Walshaw Road. Characteristics of the area include: larger plots, red brick, light coloured render. Boundary treatments include: low fence or brick wall and hedgerows. Parking along terraces is on street with on plot front and side parking in the more modern suburban developments.

DOW LANE / SEDDONS FARM

Dow Lane / Seddons Farm presents a more modern housing stock of predominately 2 - 2.5 storey semi detached/detached. Characteristics of the area include: large plots, red brick with render, integral garages and dark clay rood tiles. Boundary treatments include: low rise fence or brick wall and hedgerows. Parking along terraces is on street with on plot front and side parking in the more modern suburban developments.



FIGURE 9: LOCAL CHARACTER PLAN



SITE CHARACTERISTICS, OPPORTUNITIES AND CONSTRAINTS

This section sets out the findings and recommendations from Site investigation and technical studies which have been undertaken. The site assessment has included input from the wider Consultant Team.

TRANSPORT AND HIGHWAYS

Characteristics

The site is situated in a sustainable and well-connected location entirely within the urban area. It is located to the north-west of Bury and is bound by Lowercroft Road to the west, Scobell Street to the north, residential dwellings and industrial units to the east accessed from Tottington Road. Walshaw Road travels east to west through the centre of the allocation,

Several bus routes operate in the surrounding area, providing access to Tottington, Walshaw and into Bury where they connect with the Metrolink at Bury Interchange.

There are multiple Public Rights of Way (PRoW) that cross the site and the National Cycle Network 6 runs to the north-east of the site and serves Bury town centre and Ramsbottom. A local TfGM local cycle route runs along Leigh Lane to the south of the site.

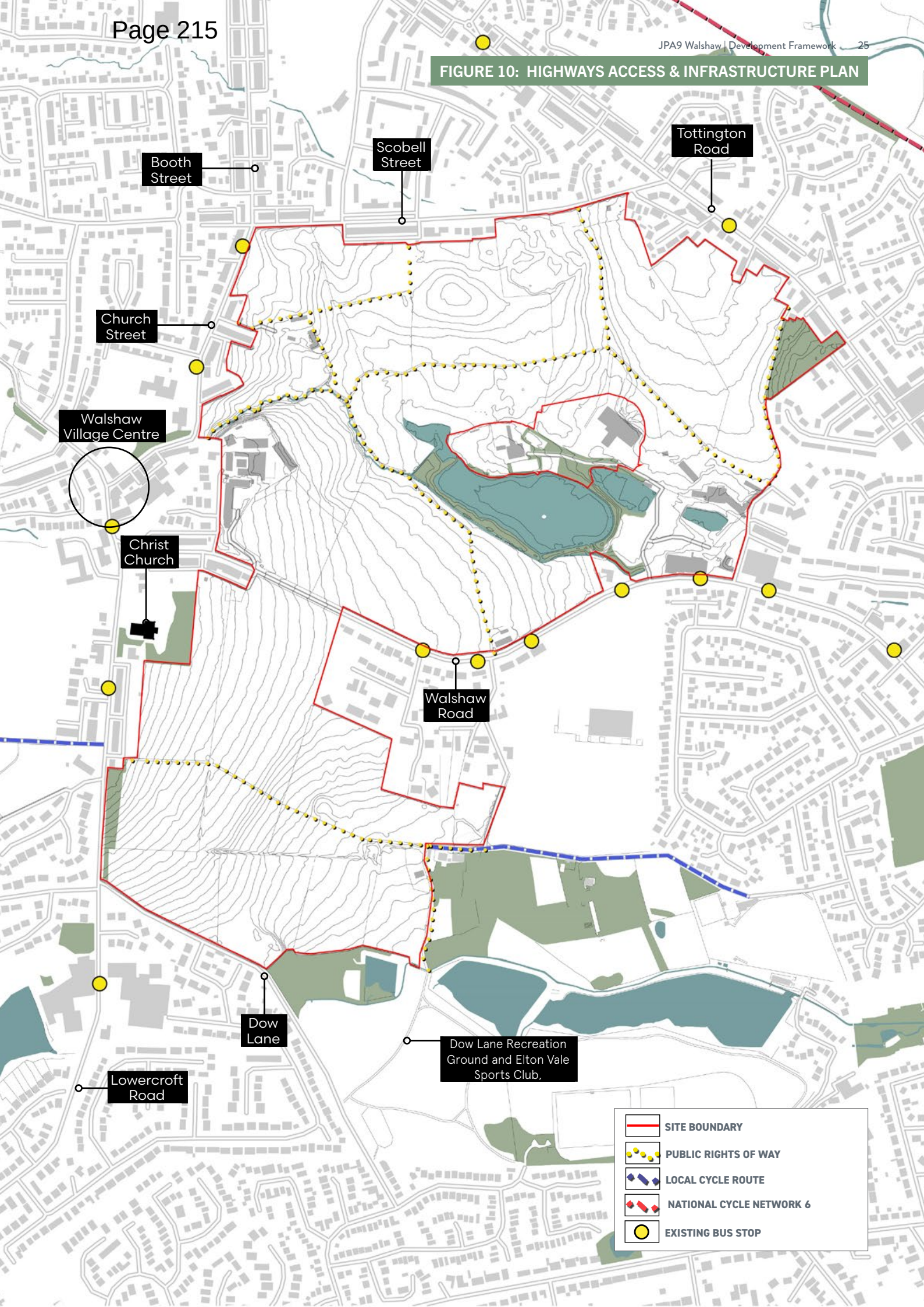
Opportunities

- The provision for new high quality bus infrastructure
- Future connectivity to Metrolink network via the new stop at Elton Reservoir
- Opportunity to deliver a new through road which will provide direct connections between Scobell Street, Walshaw Road and Lowercroft Road
- Utilising PROW to facilitate traffic free travel within the site and to neighbouring areas
- Extending bus servicing, via the new through road, into the surrounding areas, enhancing accessibility and connectivity.
- Enhanced active travel routes which will allow for off-road movement across the site.

Constraints

- Parts of the existing network already experience congestion, particularly at peak hours
- Existing bus services do not have sufficient capacity during peak hours to provide a dependable and attractive alternative to car travel.
- Width constraints on surrounding road network make new segregated active travel infrastructure difficult to deliver
- Poor connectivity due to the absence of safe and dedicated active travel infrastructure.

FIGURE 10: HIGHWAYS ACCESS & INFRASTRUCTURE PLAN



ECOLOGY

Characteristics

The site comprises of predominately modified grassland in poor condition, interspersed with hedgerow networks, woodland edges, drainage ditches, ponds and a small patch of wet woodland.

Adjacent to the southern boundary of the site is the Cyrus Ainsworth's nurseries and Parkers Lodges Site of Biological Importance (SBI). This SBI includes two water bodies, deciduous woodland, grassland, and a brook. The SBI and land within the southernmost section of the site are identified as being part of a wildlife link and corridor in the Bury UDP.

Opportunities

New development within or adjacent to identified Wildlife Links and Corridors will be integrated with the existing ecological assets and should contribute to its effectiveness through the design, landscaping and siting of development proposals.

On-site ecological mitigation and enhancement should be targeted at Walshaw and Elton Brook corridors, with the protection and enhancement of the watercourses and the associated ecosystem a key priority.

A 25m buffer should be provided between the SBI boundary and the proposed development.

Appropriate mitigation and enhancement through the design and evolution of the masterplan can ensure a sustainable ecologically integrated development and biodiversity net gain.

FIGURE 11: ECOLOGY AND LANDSCAPE PLAN



BUILT HERITAGE AND ARCHEOLOGY

Characteristics

There are no designated heritage assets identified within the site boundary. There is a Grade II* Listed Church located immediately to the west of the site with views across most of the surrounding landscape.

Opportunities

There is an opportunity to ensure that the site's intervisibility with Christ Church informs the future design of site and ensure key views towards the church particularly from Walshaw Road are retained.



FIGURE 12: CHRIST CHURCH VIEW FROM WALSHAW ROAD



FIGURE 13: CHRIST CHURCH VIEW FROM ABOVE

FIGURE 14: HERITAGE PLAN



FLOOD RISK AND DRAINAGE

Characteristics

The site is in an area identified as having a 'low' probability of flooding on the Environment Agency (EA) Flood Map and is located in Flood Zone 1.

There are three notable watercourses either within or in close proximity to the site:

- To the north of Scobell Street, in close proximity to the northern boundary of the site, an unnamed watercourse is present which flows through the existing residential area from west to east before becoming culverted approximately 50m to the west of Camberley Close. United Utilities records identify the culvert turning and flowing in a north easterly direction.
- Walshaw Brook is an ordinary watercourse which runs through the northern part of the site, flowing in a south easterly direction. There are numerous tributaries that drain at various locations along its length. There are also ponds/lakes to the north of the Brook which have connectivity.
- Elton Brook runs within the southern development Site boundary. This Generally flows in an easterly direction with a number of tributaries present within the site. One of the main tributaries commences within the site and crosses a number of the development parcels. Outside the south east boundary, north of Elton Vale sports Club, are three large water features which are referred to as the Reservoirs.

Opportunities

Retention and integration of watercourse and drains in the blue and green infrastructure as well as a naturalisation of routes, to support resilience, increased biodiversity.

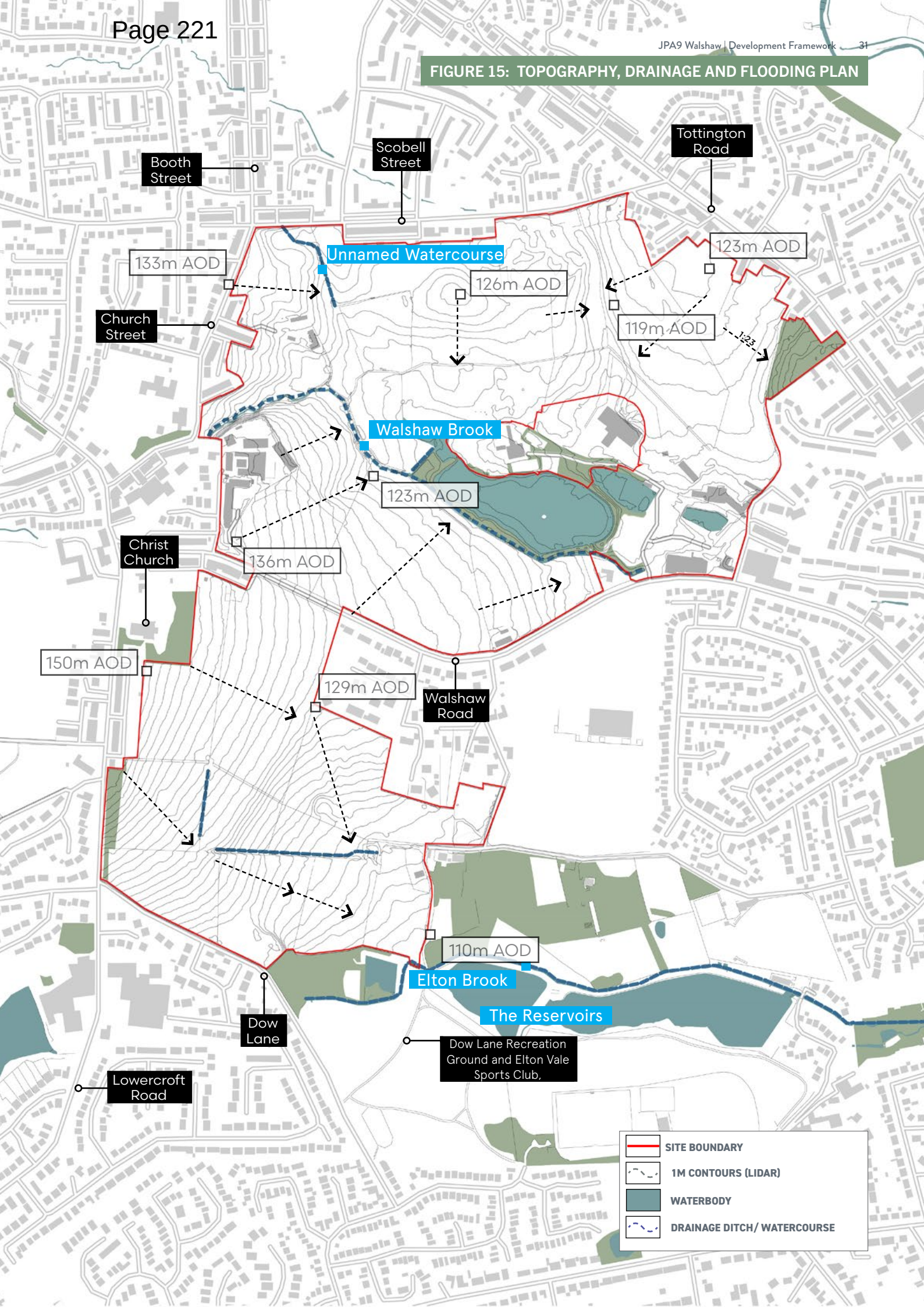
There is an opportunity to consider whether development within the site can improve flood risk and drainage in the wider area.

There is also an opportunity to integrate SUDs into the development and de-culvert watercourses within the site.

Constraints

Surface water mapping indicates that the site has areas that are potentially susceptible to pluvial flooding in the 30- and 100-year return periods. However, these are generally limited to the alignment of existing Water features.

FIGURE 15: TOPOGRAPHY, DRAINAGE AND FLOODING PLAN



GREEN INFRASTRUCTURE

LANDSCAPE

Characteristics

At a national level, the site lies within the Manchester Pennine Fringe' Character Area (National Character Area 54). At a district level, the site and study area is described within the Greater Manchester Landscape Character and Sensitivity Assessment (2018) as part of LCA20: Affetside and Ainsworth which falls within the 'Urban Fringe Farmland' character type. Urban fringe farmland is characterised by agricultural fields and landforms which, as can be seen at the site, are often dissected by networks of narrow streams and ponds. Panoramic views are intertwined with the influence of more urbanising features.

GREEN SPACE AND RECREATION FACILITIES

Characteristics

In terms of surrounding green spaces, Dow Lane recreation ground, Elton Vale Sports Club, Elton Cricket Club and Walshaw Sports Club are all close to the site. Further afield is Town Meadow Park, Old Kays Park, Burrs Country Park and the Kirkless Trail. These spaces offer a variety of facilities including walking and cycling paths, playgrounds, sports pitches, changing facilities and opportunities to host community events.

TREES, WOODLAND AND HEDGEROWS

Characteristics

The site includes scattered trees along hedgerow boundaries surrounding the Bolholt area. There are also Tree Preservation Orders on some trees located on the north west boundary off Church Street.

Much of the scattered tree stock is in a state of naturalised dilapidation. Woodland areas surrounding the Bolholt is considered to represent a collective higher value arboriculture resources.

Opportunities

There are opportunities to retain and enhance existing hedgerows and trees, particularly on the site boundaries. There is also the potential to expand tree groups and hedges to extend the coverage and network.

FIGURE 16: LANDSCAPE FEATURES PLAN



TOPOGRAPHY AND GROUND CONDITIONS

Characteristics

The site is undulating in nature however the south western edge of the site occupys the highest elevation at approximately 150m AOD. Land broadly falls to its centre in the northern half of the site while the southern half of the site falls west to east.

The preliminary risk classification of the site in relation to the proposed development is considered to be Low / Moderate in localised areas only. The remainder of the site is very low risk with no historic contaminating land uses identified. The risk to human health from potential off-site sources is considered to be Very Low / Low.

Controlled waters - The risk posed to surface water groundwater aquifers is considered to be Very Low / Low in localised areas only. The remainder of the site is very low risk with no historic contaminating land uses identified.

Coal seams, mine entries, and infilled land have been identified and future ground investigation should address these risks. However, the most recent coal mining risk assessment concluded that no mine shaft exists at the locations shown in opposite and therefore will not constrain future development and in particular the predicted alignment of the proposed strategic through road.

FIGURE 17: TOPOGRAPHY, DRAINAGE AND FLOODING PLAN



SUMMARY OF SITE OPPORTUNITIES AND CONSTRAINTS

The plan on the opposite page identifies important opportunities and constraints that will influence the design of the site.

The considerations identified are underpinned by the ongoing technical assessments presented through this document and the PfE requirements.

A summary of the main Opportunities is provided below.

- Existing Public Rights of Way within the site will be incorporated into the proposed development and enhanced (where possible), providing off-road routes that connect to neighbouring areas and Walshaw Village Centre.
- Active travel routes adjacent to key landscape features allowing for off-road movement across the site.
- In areas of steep topography areas of green space and landscaping will be utilised to ensure residential streets remain accessible and manouverable for all.
- Opportunity for through road to provide direct vehicular and active travel routes / connections between Scobell Street, Walshaw Road and Lowercroft Road.
- The proximity to local facilities provides a key opportunity for the proposed development as it will enable future residents to benefit from convenient access to the existing services and amenities on foot.
- Existing vegetation will be harnessed where possible as part of a site-wide green infrastructure strategy.
- Christ Church (Grade II* Listed) will be protected by a surrounding green buffer, thus maintaining its prominence in the area's character and still retaining views towards it from the east.

A summary of the main Constraints is provided below:

- A SBI os located to the south of the site which requires a 25m buffer zone
- Surface water mapping indicates that the site has areas that are potentially susceptible to pluvial flooding in the 30- and 100-year return periods.
- The existing transport network already faces peak hour congestion, with limited bus capacity, constrained road widths and a lack of safe dedicated active travel infrastructure reducing viable alternatives to car use.

FIGURE 18: OPPORTUNITIES AND CONSTRAINTS PLAN



4.VISION AND STRATEGIC OBJECTIVES

We aim to create a sustainable and cohesive community that successfully blends with the existing communities of Tottington, Elton, Lowercroft, and Walshaw.

THE VISION

This new neighbourhood will be characterised by how it integrates with its landscape setting and incorporates key features to create an authentic sense of identity and place. The vision is to deliver high-quality new homes within a distinct setting, while providing accessible routes to access urban amenities and opportunities.

Active travel, connections to key local infrastructure (both existing and proposed) as well as the integration of ecology rich green corridors and blue and green infrastructure will be integral in shaping this new place.

This development will aid the creation of neighbourhoods for Elton and Walshaw where residents can access everyday facilities on foot, whilst staying well connected to high-quality services and jobs through convenient, direct and sustainable travel links.

STRATEGIC OBJECTIVES

1. Deliver a sustainable and inclusive community;
2. High-quality design-led approach to the development;
3. Enhance connectivity and transport; and
4. Support and enhance connections to local services and facilities.



5. DESIGN PRINCIPLES

PRINCIPLE 1 COMMUNITY FOCUSED



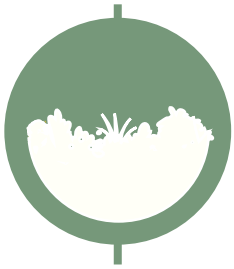
The Walshaw development will foster a strong sense of community and belonging. We envision shared spaces and facilities that encourage social interaction, recreation, and cultural exchange, thereby creating a vibrant and inclusive community.

PRINCIPLE 2 SUSTAINABLE MOVEMENT

High quality green corridors and off road routes will be provided across the new neighbourhood which promotes movement across the site to utilise more active forms of travel whilst bolstering and enhancing existing green infrastructure and reducing car trips on the external network.



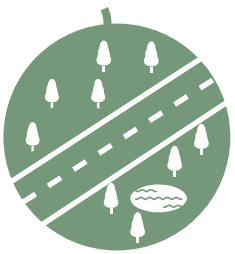
PRINCIPLE 3 LANDSCAPE-LED



Existing landscape features will be retained and integrated, forming a strong green network and high-quality landscape setting for the new community which will heavily characterise this new place. Hedgerows, trees, brooks and reservoir provide the opportunity for placemaking and amenity.

PRINCIPLE 4 MEANINGFUL INFRASTRUCTURE

New infrastructure will enable new and existing residents to navigate and enjoy the area and to 'live locally'. A new Through Road will provide a key active travel route linking homes to community infrastructure and facilities in nearby neighbourhoods.



6.MASTERPLAN

This section outlines the parameter plan, illustrative masterplan and the design principles that underpin the overall masterplan.

The Illustrative Masterplan has been informed by the preparation of Parameter Plans which draws upon the technical evidence set out within the site Assessment Section and also the work that was prepared to inform JP Allocation 9 within PfE.

PARAMETER PLAN

The following section presents the parameters for development.

Residential (to include highway / utilities infrastructure

Approximately 31.5 ha of land can accommodate residential development, providing the potential to deliver approximately 1250 homes.

Primary School

Approximately 1.5ha of land has been provided to allow for a one form Primary School.

Local Centre and Development

Approximately 0.6ha of land has been provided for a local centre which includes a range of appropriate retail, health and community facilities.

Green Infrastructure

The area available for green infrastructure is approximately 30.4ha.

Vehicle Access

New junctions to serve the proposed development will be provided as well as a new strategic Through Road. The council will be mindful not to encourage rat running through the site.

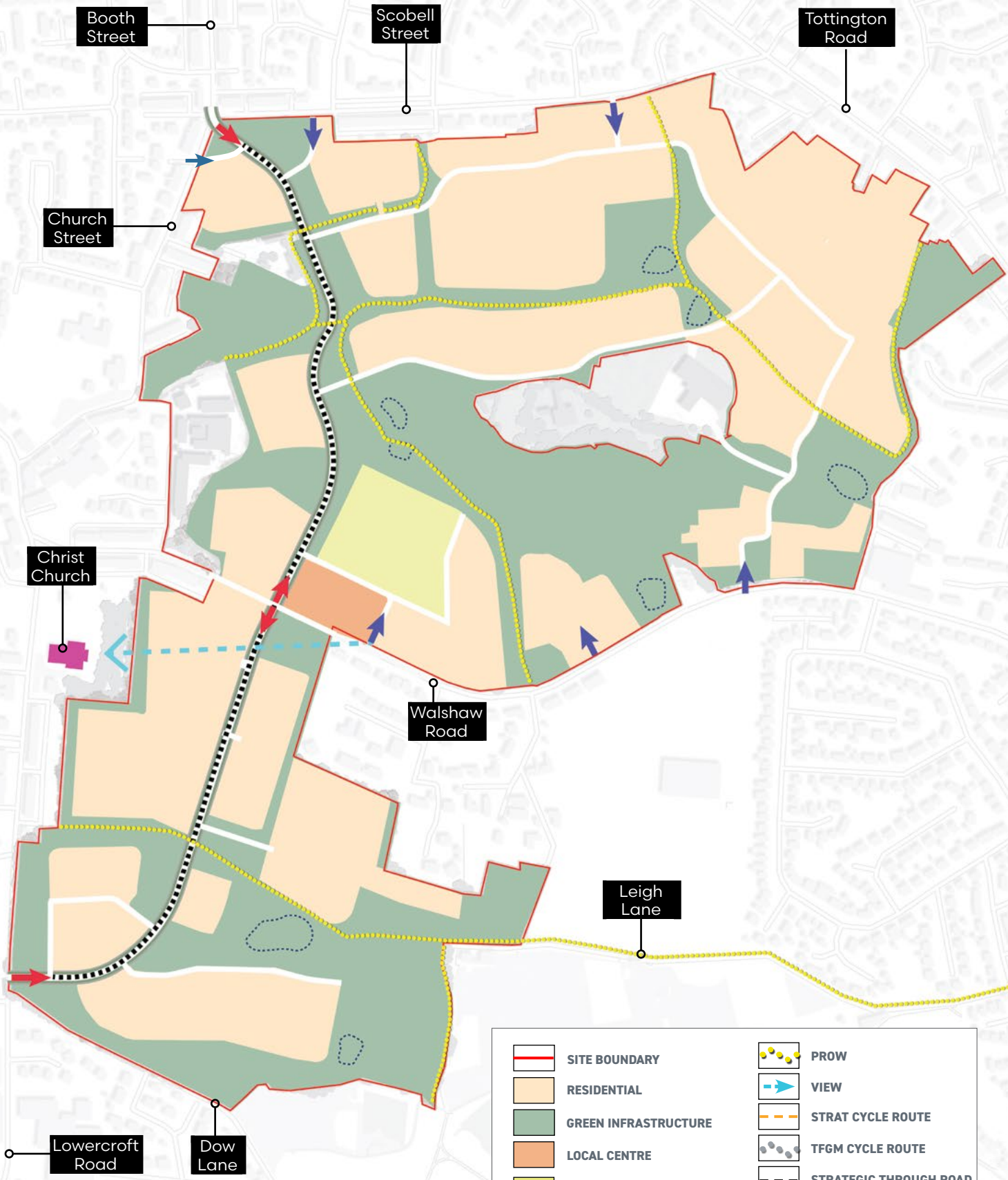
Building Heights

Predominately 2 storey with some 2.5 storey homes in key positions to aid permeability and legibility.

PARAMETERS

Use	Area (ha)
Residential	c.31.5
Green and Blue infrastructure	c.30
Local Centre	c.0.6
School	c.1.5

FIGURE 19: PARAMETER PLAN



INDICATIVE ILLUSTRATIVE MASTERPLAN

The purpose of the Illustrative Masterplan is to show how the parameters and principles will provide for the creation of a rich, varied and attractive development comprising a mixture of house and street types. Variations in density and urban grain will create distinct character areas and edges. It will provide a high-quality new community of, approximately 1,250 homes.

The Masterplan shows how existing landscape features will become focal points within the new neighbourhoods and support an extended and enhanced movement network that incorporates active travel.

The mix of uses provided will contribute to a sustainable new neighbourhood with key local infrastructure, such as primary school, local centre and mobility hub, easily accessible on foot or cycle.

A key piece of road infrastructure will be provided in the form of a new strategic Through Road which will connect Booth Street / Scobell Street (in the north) to Walshaw Road (central) and Lowercroft Road (in the south). In addition to relieving traffic congestion to the west of the site (Church Street / Walshaw village centre) it will provide active travel routes and therefore form a integral movement route connecting through the site and linking existing and proposed east-west path / cycle connections and a mix of high quality family homes.

THE MASTERPLAN INCORPORATES THE FOLLOWING KEY FEATURES:

1. Strategic Through Road (with potential for a bus route) providing access and connections to the wider highway network.
2. Integrated green / blue infrastructure with an extensive network of pedestrian and cycle routes, interfacing with surrounding facilities, alongside opportunities for children's play.
3. Site for a new primary school following school streets principles.
4. Retention of important existing landscape features.
5. Protection and enhancement of important heritage assets.
6. Surface water drainage solutions which have the potential to enhance biodiversity.
7. Community allotments that can be used by the residents.
8. New local centre with new retail and community facilities.

FIGURE 20: INDICATIVE ILLUSTRATIVE MASTERPLAN



CHARACTER STRATEGY

The Character Strategy for the site aims to create a vibrant neighbourhood, where different uses are conveniently located and at walking and cycling distance from most homes.

Building Heights

Building heights across the site will be approximately 2 to 2.5 storey in height. This will vary depending on local context and there may be the potential for higher buildings in some areas.

Density

While the average density for the site as a whole will be 37.7 dph, a range of densities will feature across it responding to the proposed locations of key facilities and will relate to the site-wide movement strategy. Primary streets will have a higher density than the outer edges of the site. This principle will also ensure a sensitive response to the site's surrounding landscape.

Key Spaces

A sequence of spaces along the main route and throughout the development will provide a variation in character and development treatment, aiding legibility for pedestrians and cyclists and offering traffic calming.

Key Buildings

Other key buildings will be used to further emphasise the site's accesses, key spaces, and the hierarchy of routes throughout the site, aiding legibility. They will be achieved through scale, massing, use, architectural style and/or detailing. They will need to fulfill at least one of the following functions:

i) terminating and/or completing vistas and key views;

ii) creating a gateway and pinch points;

iii) creating landmark buildings to support wayfinding; and/or

iv) creating a sense of scale at key spaces.

Building Formality

Building formality across the site will vary depending on the character area it is within, for example The Avenue and Woolfold will feature more formal street frontage and formal response to green space than that of The Glade.(See the next section for character area details)

Block Structure

Perimeter blocks will be the most common typology across the site, with blocks located along the Primary Street generally accessed from the back or via small parking courts.

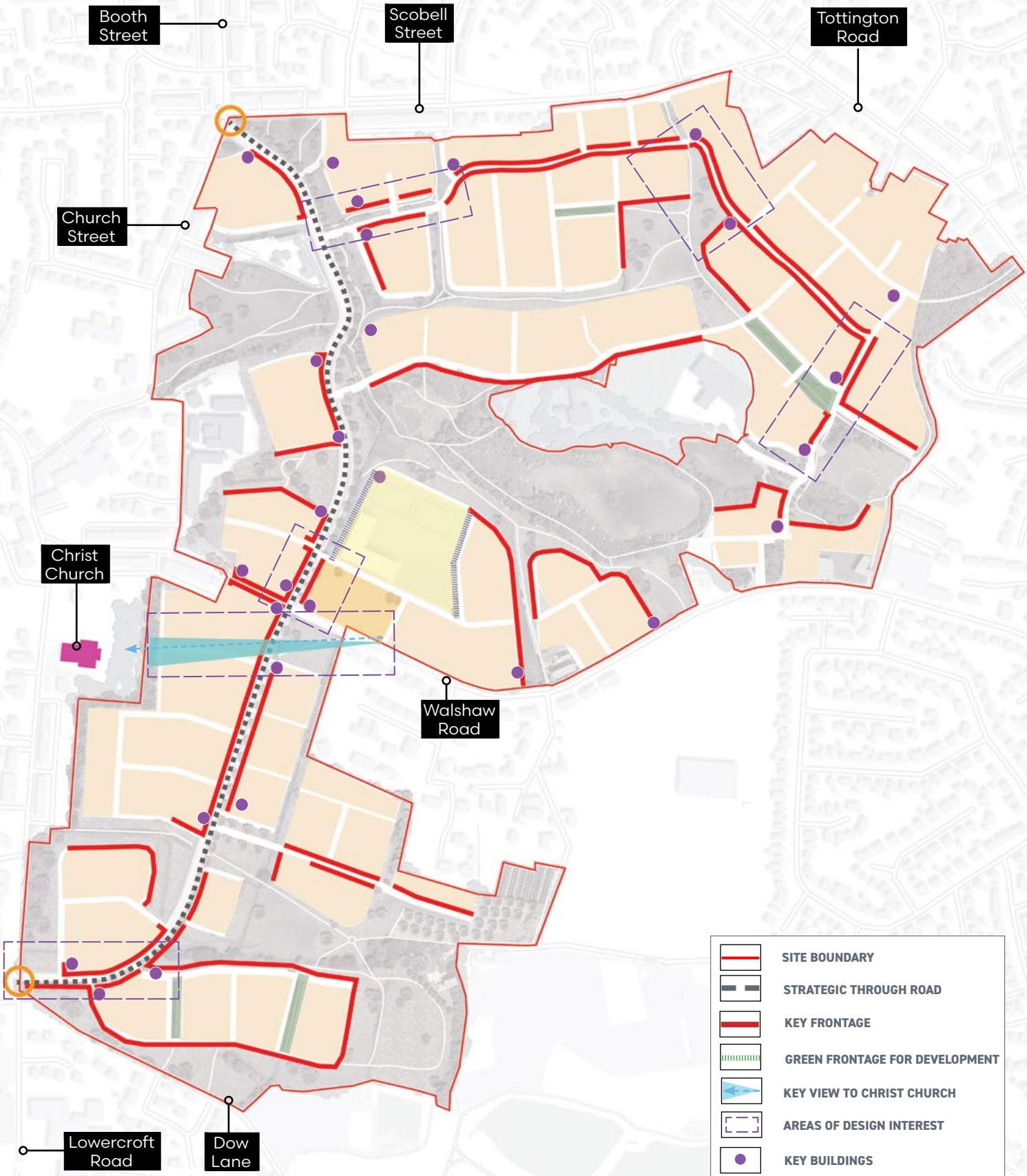
Key View

There is a key view in the site from Walshaw Road towards the listed Christ Church to the west of the site. To ensure the development does not disrupt the view, green space has been provided and streets orientated to maintain a view corridor.

Strategic Through Road Frontage

While strategic, the through road is still a street and has a significant role to play in defining the character of the whole site. It will span and influence all the character areas identified. As such, the scale and massing of built form will vary accordingly and will be generally formal with the use of symmetry and vertical elements to emphasise height. Modern and traditional interpretations of the principles are appropriate.

FIGURE 21: CHARACTER STRATEGY PLAN



A strong character within a development is an important placemaking principle as it helps residents feel a sense of belonging, identity and pride in where they live. This can be achieved though layout, massing, landscaping, building appearance and appropriate street design, all of which add a further layer of richness to the place.

CHARACTER AREAS

There are two broad character areas identified in the masterplan. These relate to the 'core' development and two separate areas where there is greater opportunity for a variance in character to respond more directly to the site's landscape character.

These respond to the wider influences of the site which include land form, topography, landscape framework, and the relationship to the existing urban environments as identified in the earlier 'local character' section.

Edge frontages have also been identified to ensure that the built form provides a suitable transition to the wider landscape and responds positively to the heritage sensitivities of the Grade II* listed Christ Church.

(1a)Core Area 1: The Avenue

Located centrally within the site, this character area flanks the strategic Through Road (Avenue) and encloses the local centre: Average density will be higher with close proximity to community and transport infrastructure and to create definition to the central Through Road.

(1b) Core Area 2: Woolfold

Closely relating to the adjacent existing communities this character area will typify high-quality residential neighbourhood defined by family housing in and around Bury. Average densities will increase to the eastern / western edges in closer proximity to community and transport infrastructure.

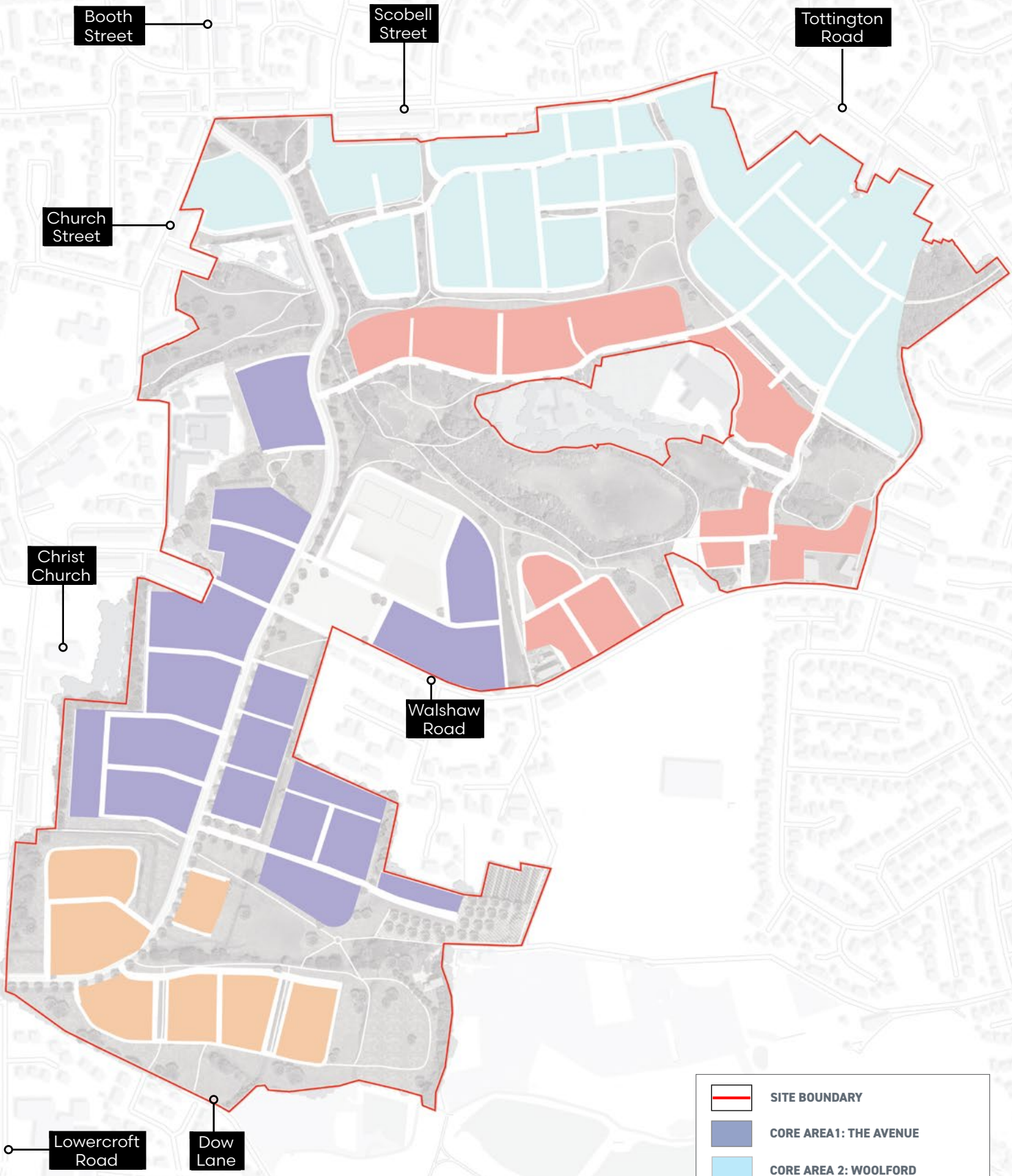
(2a) The Glade

Low density area characterised by a bio-diverse landscape environment with retained mature trees and hedgerows. With direct walking and cycling connections to the adjacent park.

(2b) The Woodland

Lower density area characterised by its proximity to the large body of water and its surrounding mature wooded landscape.

FIGURE 22: CHARACTER & BUILT FORM STRATEGY PLAN



Character Areas 1 'The Avenue' and 'Woolfold'

The Avenue and Woolfold are similar in that they are residential neighbourhoods with regular development blocks, located in the north and centre of the site, creating continuity and clear block structure, reflecting that of the surrounding neighbourhoods.

Character

This area has formal development lines with clear blocks throughout both areas. They will have a more suburban feel with a semi-formal character inspired by the traditional residential neighbourhoods found in Bury.

Core Area 1: 'The Avenue' is heavily influenced by the Through Road and topography where residential streets will slope down from west to east and will provide the opportunity for views east towards Bury and north towards the hills.

Core area 2: 'Woolfold' is more contained with its character area defined by the street and spaces and journeys that are made through them.

Scale and Density

The residential areas will be approximately 2 to 2.5 storey in height and with an average density of approximately 35 dph.

Scale and density will be higher in 'The Avenue' and its core area due to their proximity to transport links such as the Strategic Through Road at approximately 35 dph to 40 dph.

Whereas, the scale and density in Woolfold will decrease to the eastern and western edges. Here the development will be in closer proximity to community and transport infrastructure with an average density of 35 dph.

Distinct Frontages

The Avenue has key frontages that run along the new strategic Through Road. The Eastern side of this road will see a landscaped strip / rain garden with tree planting.

Woolfold has a key frontage along its primary street that connects from Walshaw Road in the south to the Through Road in the north west.

Landscape

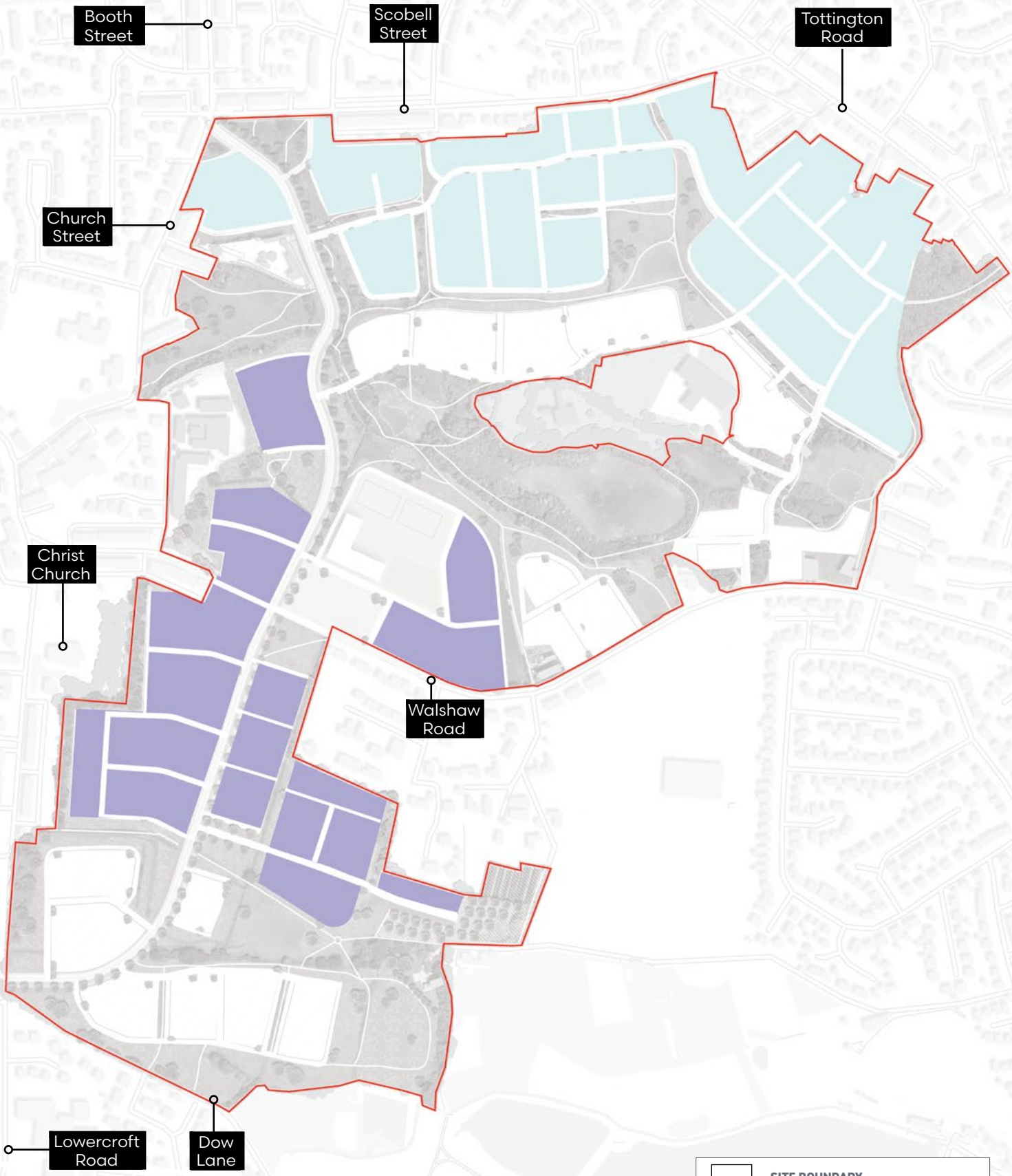
Landscape within The Avenue and Woolfold will typically be formal and structured where development area meets open space, leaving the more naturalistic landscape to the outer edges of the site.







FIGURE 23: CHARACTER AREAS 1 PLAN



Character Areas 2 'The Glade' and 'The Woodland'

The Glade and The Woodland are residential neighbourhoods heavily influenced by their landscape context. Featuring key green frontages and views.

Character

These areas will have an informal character with variation in building line which will help the residential development here feel more organic. Verdant character with trees within plots and hedgerows.



Scale and Density

The residential areas will be largely two storey in height at an average density of approximately 35 dph.

This lower average density will help define the character and provide the opportunity for strong integration with the adjacent landscape.



Distinct Frontages

Each area will have a distinct frontage which responds to its edge context and will have a strong landscape feel.

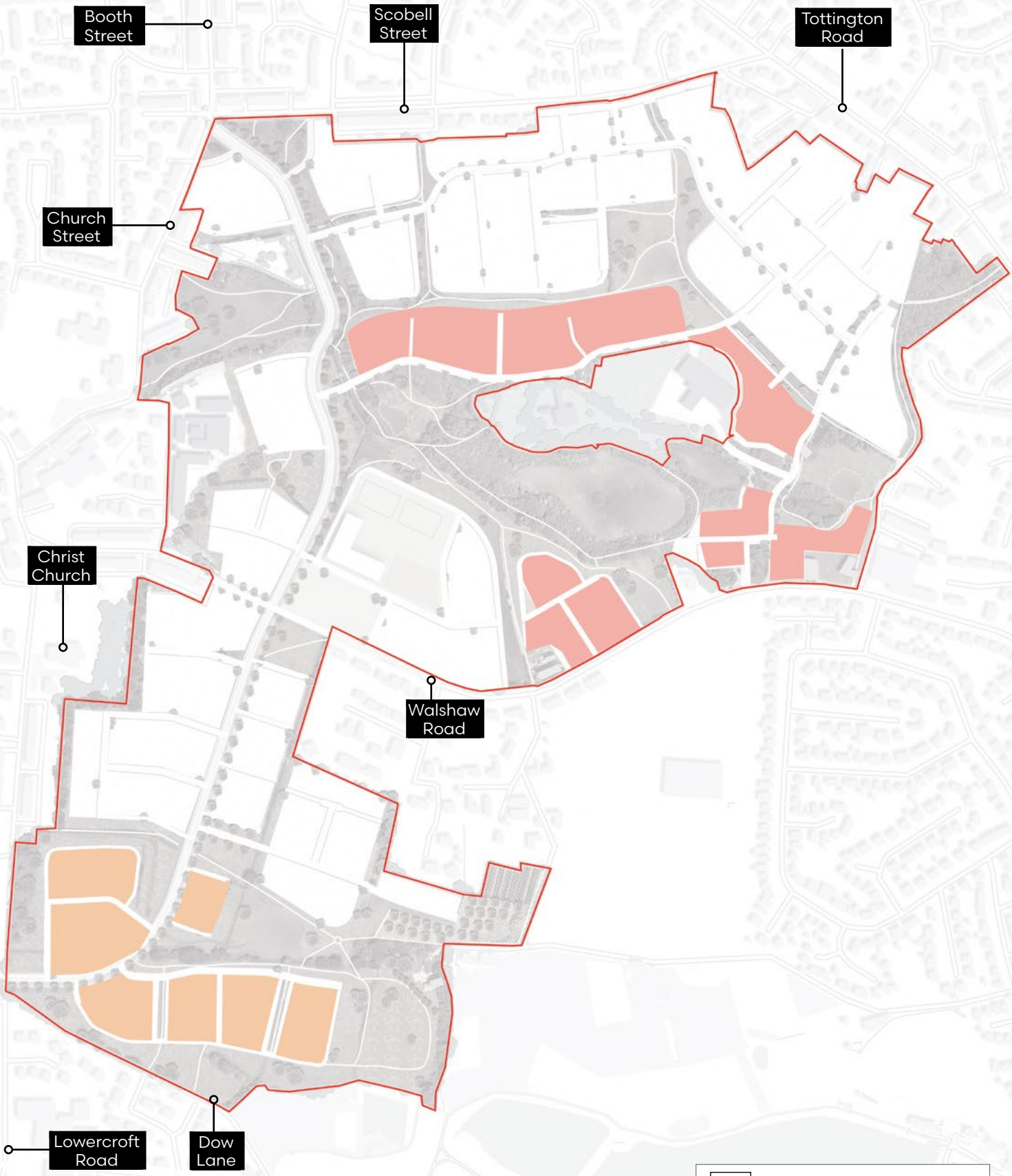
Landscape

These areas will tie in with the distinct landscape setting within the site's central and southern edges. It is a landscape-led neighbourhood which generally fronts open space.

Landscape will typically be formal and structured where development area meets open space, leaving the more naturalistic landscape to the outer edges of the site.



FIGURE 24: CHARACTER AREAS 2 PLAN



MOVEMENT AND STREET HIERARCHY

Pedestrians

A permeable and legible pedestrian environment is integral to creating a successful community. Pedestrian movement will be provided through a network of off-road and on-road paths. These will allow new and existing residents to traverse the site away from vehicles.

Pedestrian routes will promote active movement and will link to existing recreational routes and destinations in and around the site.

The indicative design of off road paths is shown opposite.

Cycling

Cycling infrastructure will be provided across the site both formally along the Through Road with the provision for a 3m shared cycleway/footway and off-road routes throughout the site.

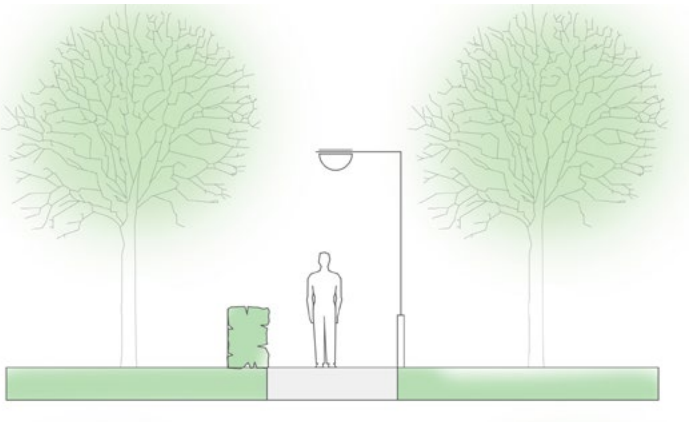
Connection with the wider national cycle network route 6 to the north east will be provided onto Tottington road and the existing PROW going north.

Cycle way/ off road paths moving west to east are also provided to the west via Lowercroft Road and to the east via Leigh Lane.

Figure 26 highlights the indicative design of any off road path.

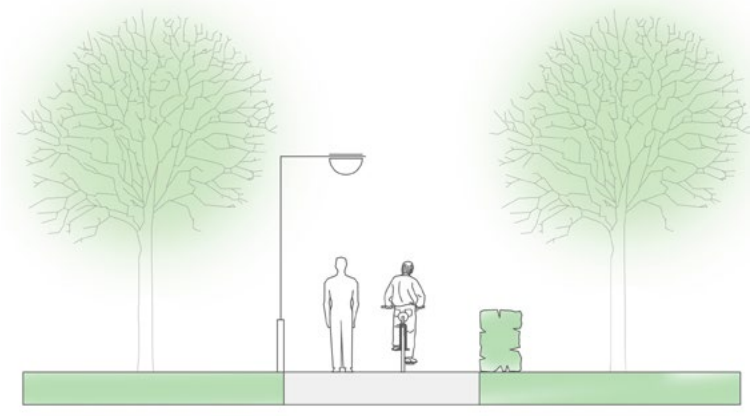
Strategic cycleways will provide safe, attractive and convenient connections between development parcels and key designations within and around the site.

FIGURE 25: OFF ROAD FOOTPATH



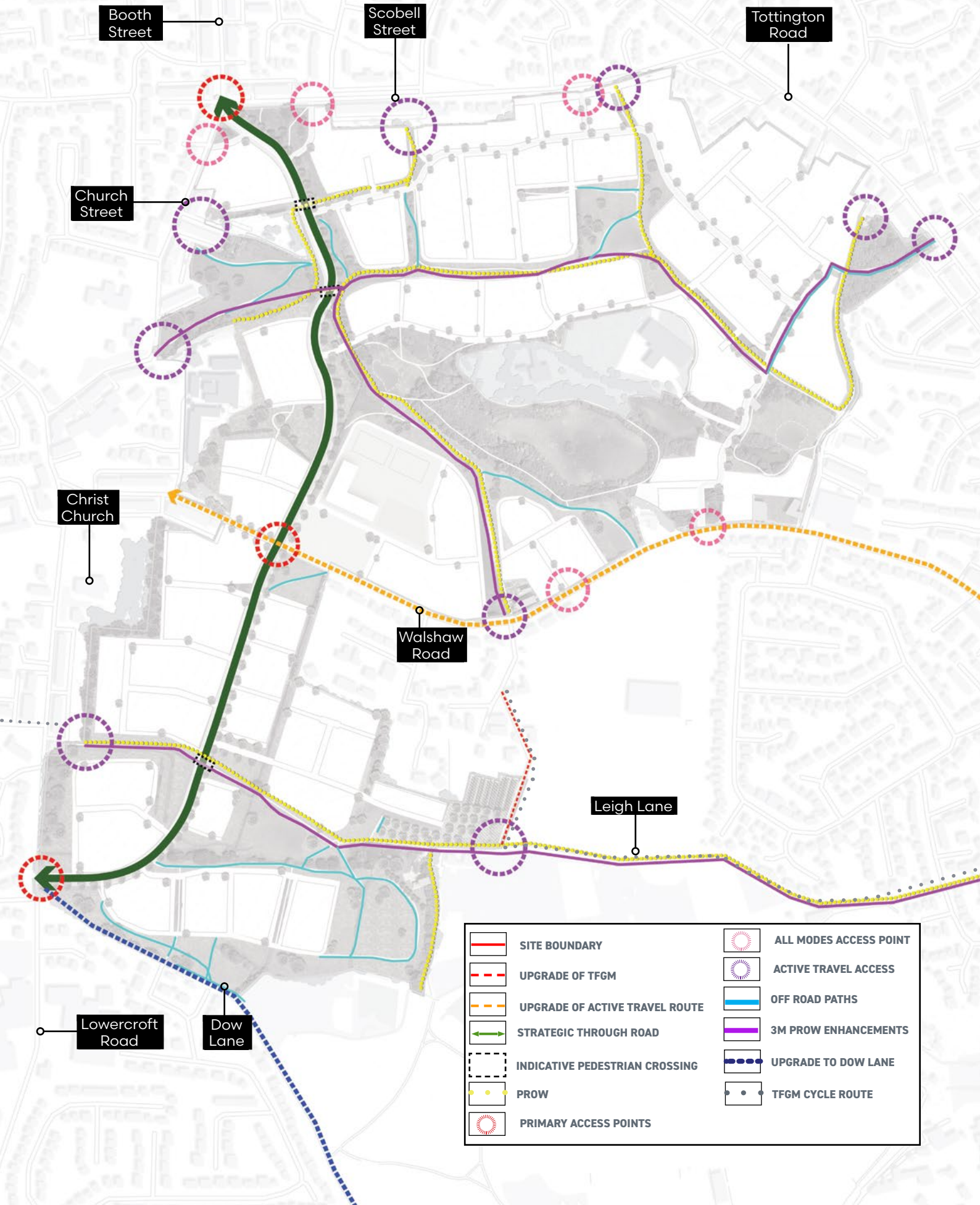
Path

FIGURE 26: OFF ROAD CYCLE / FOOTPATH



Path

FIGURE 27: ACCESS AND MOVEMENT STRATEGY PLAN



Vehicular Access

Primary access will be provided off Booth Street and Lowercroft Road.

Secondary access will be provided via: Scobell Street and Walshaw Road.

Strategic Through Road

As part of the allocation policy, a Strategic Through Road must be provided. This strategic Through Road will have the potential to provide a bus route. An indicative design can be seen opposite.

Street Hierarchy

Together, these street types will create a legible neighbourhood, with a permeable and easy to manouvre environment that supports the needs of all users.

The street sections presented opposite and Figure 32 illustrate where these street types could be applied across the proposed development.

FIGURE 28: THROUGH ROAD

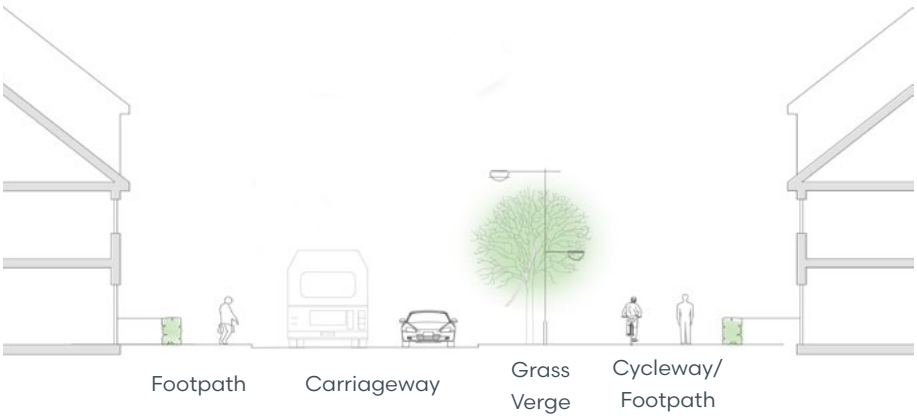


FIGURE 29: RESIDENTIAL STREET

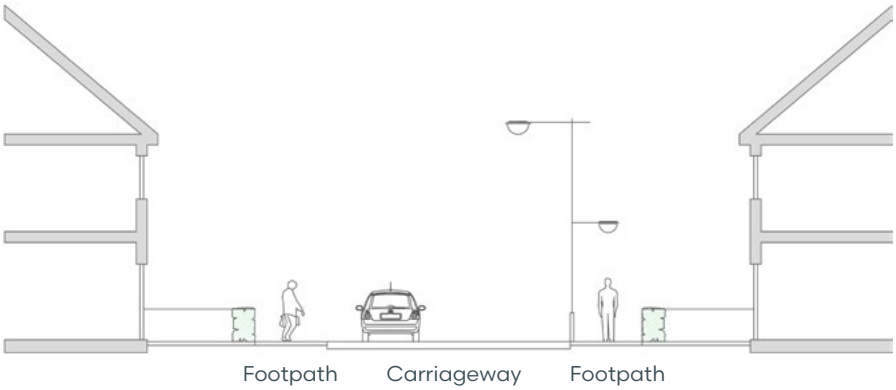


FIGURE 30: SHARED STREET

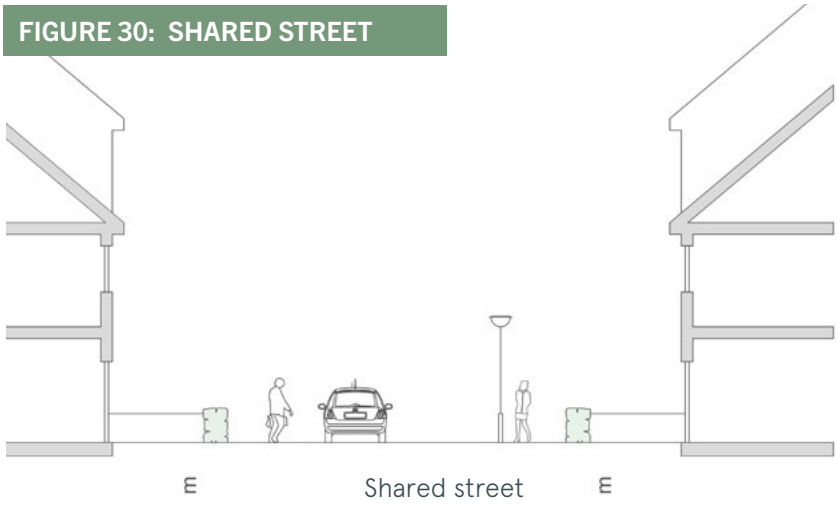


FIGURE 31: PRIVATE LANE/DRIVE

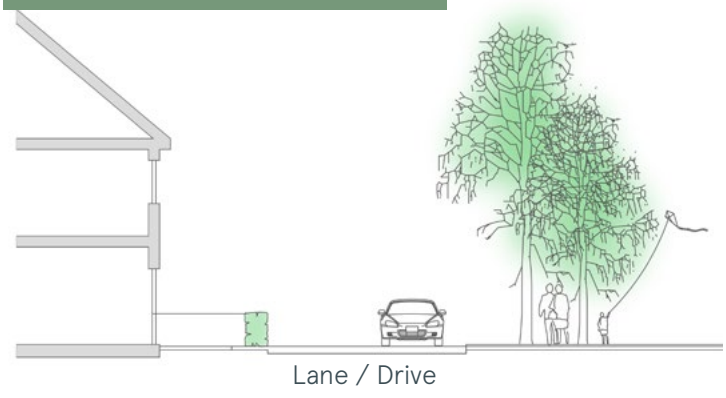
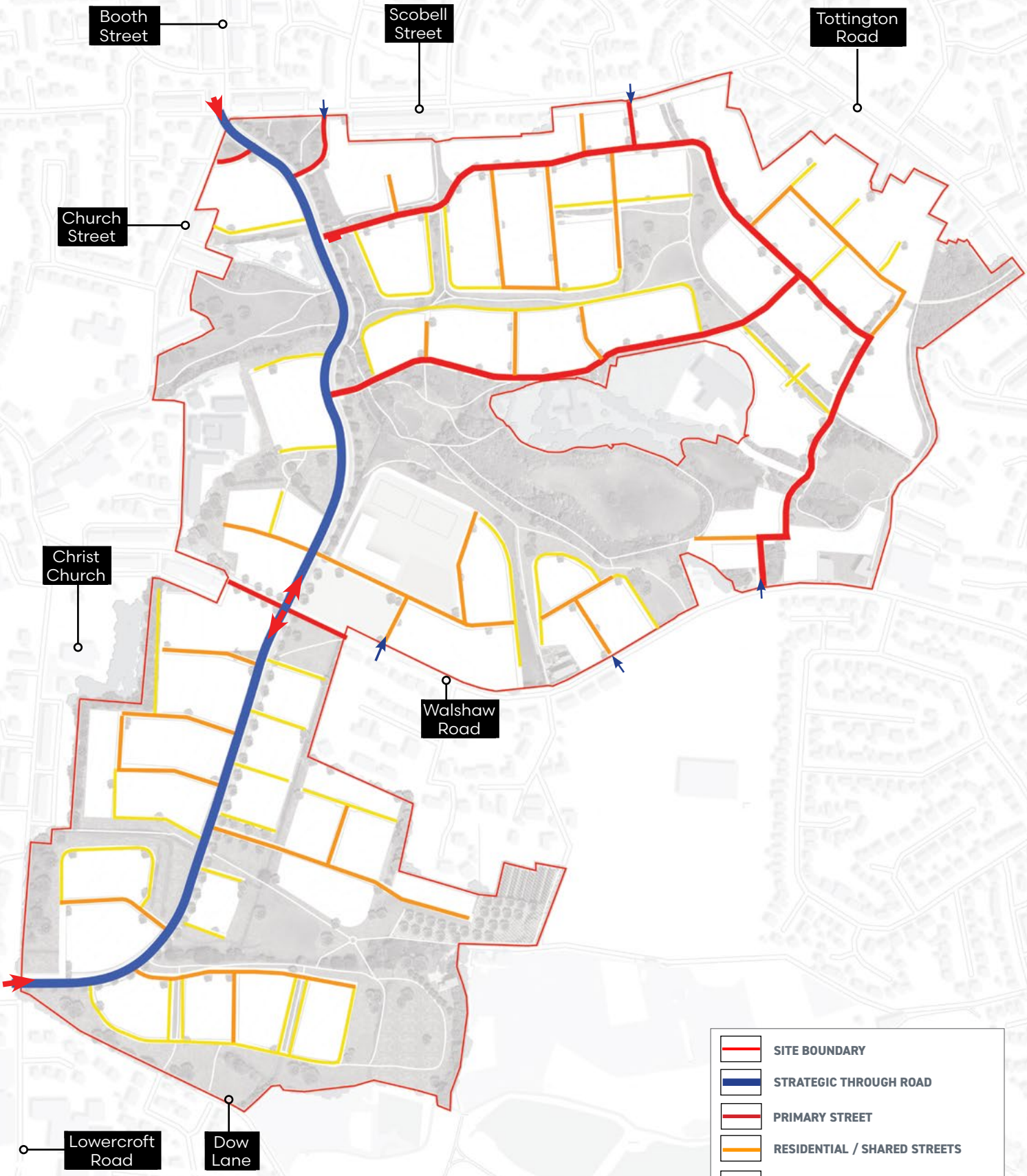


FIGURE 32: ACCESS AND MOVEMENT STRATEGY PLAN



ECOLOGY

Biodiversity

The areas of public open space provided and the proposed naturalistic approach to landscape will enhance biodiversity through the creation of a range of new habitat types throughout the site.

The proposed landscape at Walshaw includes a network of spaces totaling over 20ha, featuring new parks, gardens, and publicly accessible natural areas.

The development will deliver at least the statutory 10% Biodiversity Net Gain (BNG) through a mix of on-site enhanced areas of green spaces and landscaping, and off-site mitigation.

The masterplan represents a sustainable and ecologically integrated framework that is capable of delivering meaningful environmental enhancement alongside new housing. The allocation not only mitigates potential impacts but also provides a strong foundation for long-term nature recovery and measurable biodiversity gains.

FIGURE 33: ECOLOGY STRATEGY PLAN



FLOOD RISK AND DRAINAGE

Surface water across the site will be drained through the implementation of SuDS. These are proposed to discharge site flows at a restricted surface water discharge rate through a series of attenuation ponds to Walshaw Brook (north of Walshaw Road) and Elton Brook (south of Walshaw Road).

The strategy for storm drainage proposes to compliment the existing network, by conveying flows to the existing watercourses. The new drainage network will incorporate flow restrictions and SuDS design principles to manage and minimise peak surface water runoff and mitigate water quality risks.

All SuDS should be designed and implemented using the SuDS Design Guidance, in general accordance with the SuDS Manual and Sewerage Sector Guidance for adoptable Sustainable Drainage Systems (SuDS).

SuDS are proposed to be incorporated into the grass verge alongside the strategic Through Road, potentially as rain gardens.

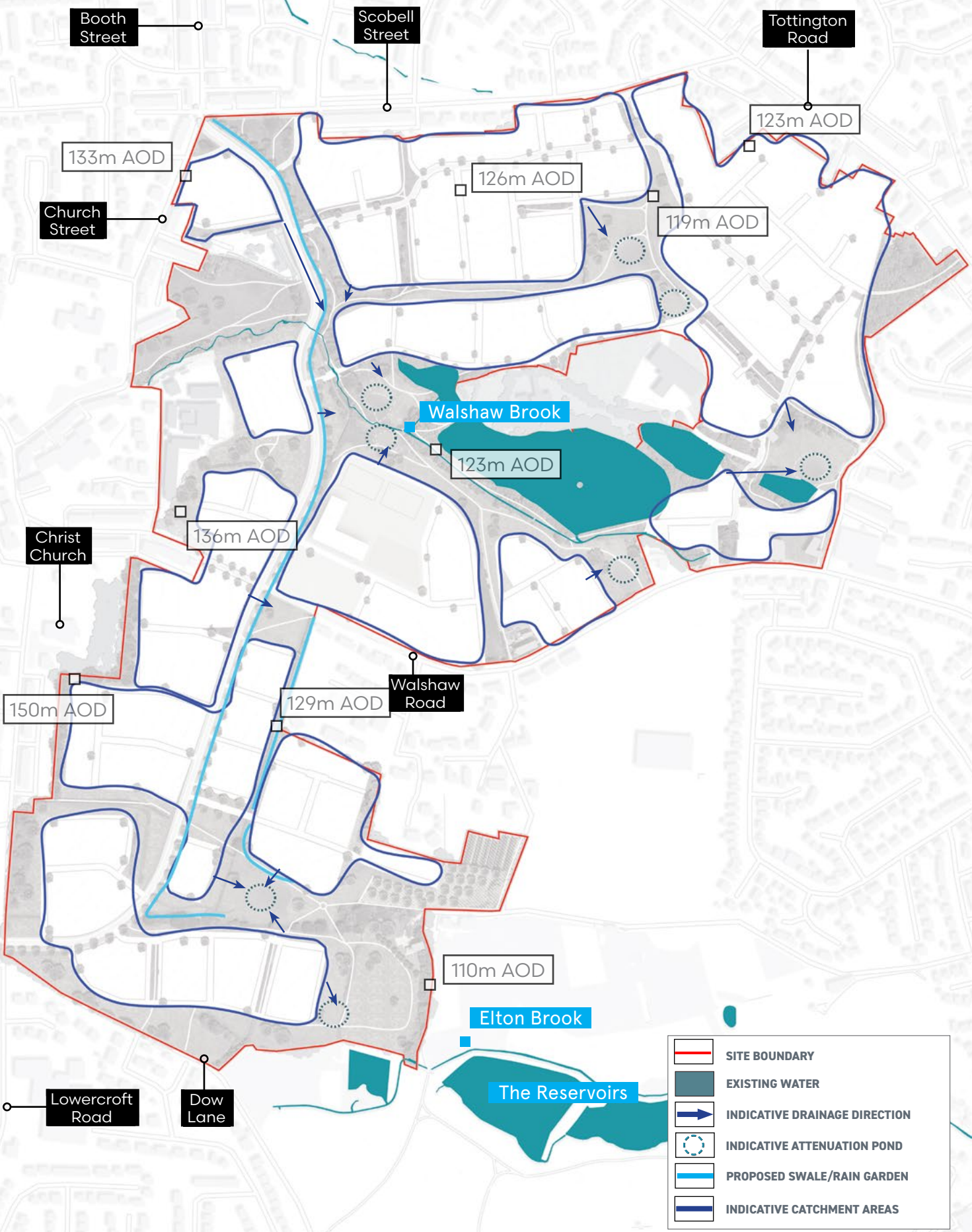
The final drainage scheme will be confirmed at the detailed design stage.







FIGURE 34: DRAINAGE STRATEGY PLAN



OPEN SPACE, SPORT AND RECREATION

To help integrate the proposed development with its surrounding environment and encourage sustainability, a series of key design considerations have been incorporated into the green infrastructure plan.

The development will ensure there is provision for new, high quality, publicly accessible, multifunctional green and blue infrastructure within the allocation including the integration and enhancement of the existing green infrastructure corridors and assets at Walshaw and Elton Brooks.

All planning applications should demonstrate how the recreational needs of prospective residents will be met, particularly through on-site recreation provision in the first instance.

Key considerations focus on preserving and enhancing the natural landscape, supporting biodiversity, and inviting both new and existing residents to enjoy and connect with the parks and green spaces.

The aim is to create a cohesive and vibrant green area that supports ecological health and enhances the well-being of the community.

Below are the key design principles incorporated into the proposed green infrastructure:

- Retain and enhance landscape features, such as existing woodlands, groups of trees, water bodies, and hedgerows, integrating them into the Green Infrastructure network where possible.
- Improve habitat connectivity across the site by using a mosaic of habitats that reflect the historic landscape pattern, including woodland blocks, tree belts, grassland meadows, and hedgerows.
- Reflect the existing settlement edge patterns and character through structural planting, land use, and appropriate transitions in scale and massing at the settlement boundaries, responding to the surrounding context.
- Improve active travel routes and connections across the site, linking to existing public rights of way (PRoWs) and pathways.
- Enhance the habitat value and accessibility of Walshaw Brook by creating an ecological park along the watercourse.
- Create an attractive, legible, and secure environment for the proposed residential development, supported by quality green connections and well-overlooked spaces.
- Design spaces that integrate both formal and informal recreational areas, connected by active travel routes, all within a vibrant natural green setting.



FIGURE 35: LANDSCAPE STRATEGY



GREEN AND BLUE INFRASTRUCTURE NETWORK

The proposed landscape at Walshaw includes a network of spaces totalling over 20ha, featuring new parks, gardens, and publicly accessible natural areas.

These spaces will be integrated into the area's broader green infrastructure, offering both new residents and existing communities opportunities to enjoy the outdoors with planned routes and connections enhancing accessibility throughout.

The spaces vary in size and character, influenced by natural assets such as mature vegetation, water features, views, and biodiversity, while also incorporating new park amenities like play areas and food-growing spaces.

This development is designed to support the positive use of nearby green spaces, such as by offering a high-quality setting, providing natural surveillance, and facilitating easy access by walking and cycling.

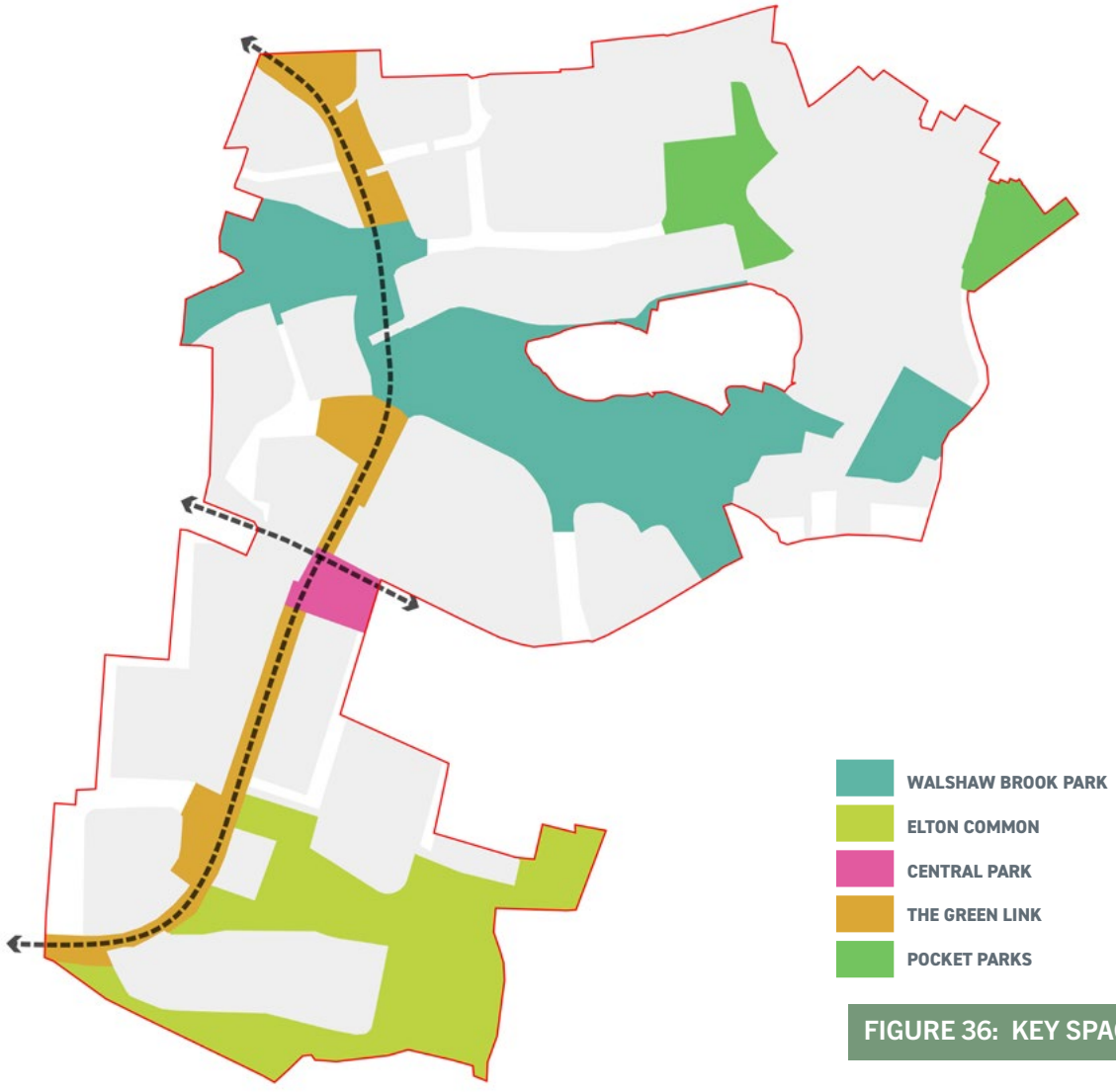


FIGURE 36: KEY SPACES PLAN

WALSHAW BROOK PARK



Walshaw Brook Park will offer natural space, enriched with mature trees, flowing water, and a series of lakes. The park will offer a variety of play features for all ages, including a skate park, pump tracks, and traditional playgrounds, making it an inclusive destination for outdoor recreation and connection with nature.

ELTON COMMON

To the south of the settlement lies Elton Common, a new park spanning 6.2ha, which links to Dow Park to the south-east. The park will feature a network of paths that connect to neighbouring communities, along with a multi-use games area (MUGA) and an adventure play area. Additionally, there will be allotments available for local community food growing.



CENTRAL PARK



The new Green Square, located at the heart of the development, serves as a vibrant hub that connects local amenities and shops with quality open space. This semi-formal green area creates a welcoming environment where residents can gather, shop, and enjoy the outdoor space.

POCKET PARKS

Pocket parks will be integrated throughout the development and serve multiple functions including local amenity space, children's play facilities, biodiversity features and SUDs features including attenuation basins.



7.DEVELOPMENT PRINCIPLES

The following Development Principles have informed the parameters for the development of the Walshaw site and should be considered as part of any future planning applications. Bury Council will require all planning applications to include supporting information that demonstrates how the development addresses relevant development plan policies and incorporates these Development Principles.

Whilst the masterplan for the Site is indicative, any proposed deviation from the Development Principles will only be acceptable if there is clear, robust and agreed evidence that demonstrates an alternative approach would be more beneficial, with reference to the Vision and Objectives set

DESIGN

Development of the site should deliver high-quality, inclusive and sustainable places that respond positively to local context and contribute to a distinctive sense of place, particularly in terms of:

- Responding positively to local context and character
- Place-making and urban design quality
- Climate responsiveness and resilience
- Respect and respond to the natural environment

All development proposals should adopt a design-led approach from the outset, ensuring that design considerations shape the form, layout, scale and function of development rather than being applied retrospectively. All planning applications should be accompanied by a design code.

PfE Policy JPA9 requires new development to ensure its design and layout allows for effective integration with surrounding communities, including active travel links and connections to the recreation areas at Dow Lane, Elton Vale, Whitehead Lodges as well as Walshaw Village and Bury Town Centre.

PfE Policy JP-P1 sets out the key attributes that all development should be consistent with in order to meet the aim for the city region to be one of the most liveable city regions in the world, consisting of a series of beautiful, healthy and varied places.

PfE Policy JP-G6 requires development to be designed to support the positive use of nearby green spaces, such as by offering a high-quality setting, providing natural surveillance, and facilitating easy access by walking and cycling.



The following design principles must be incorporated into all development proposals within the site:

Responding positively to and being informed by a thorough understanding of the local context and character, including:

- The site's natural, built and historic environment;
- The local townscape, landscape and setting;
- Established patterns of development, street hierarchy and plot structure; and
- Local materials, detailing and architectural features.

Delivering high-quality and inclusive development that contributes to a distinctive sense of place, particularly in terms of:

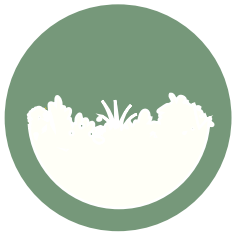
- Being visually attractive and distinctive, through architecture, materials and detailing;
- Incorporating distinctive architectural reference points at key gateway locations and arrival points to assist with legibility;
- Using high-quality, durable and sustainable materials that are easily maintained and resistant to the effects of ageing weather and climatic conditions;
- Ensuring that development blocks, individual buildings, streets and spaces function in a safe, inclusive and accessible way that creates a legible sense of place;
- Ensuring that the development makes an effective and efficient use of land and natural resources;
- Using high-quality, durable and sustainable materials that are easily maintained and resistant to the effects of ageing, weather and climatic conditions;
- Enabling effective, inclusive and safe patterns of movement with a clear hierarchy of routes within and around the development that promotes walking, wheeling, cycling and the use of public transport;
- Ensuring that the development is accessible to people with disabilities, the elderly and those with small children;
- Being safe and secure by minimising actual and perceived opportunities for crime and anti-social behavior;
- Making appropriate provision for gardens and/or outdoor amenity space that reflects the type and size of each new dwelling;
- Making provision for high-quality green infrastructure, the provision of wildlife habitats and other wildlife-friendly features within the development;
- Ensuring opportunities are taken to positively integrate and enhance existing natural assets, such as rivers and wetlands, into the development, where appropriate;
- Promoting health and wellbeing; and
- Considering opportunities for the incorporation of public art.

Delivering development that is resilient to the ongoing and predicted impacts of climate change, particularly by:

- Incorporating low carbon materials to reduce the embodied carbon of new development;
- Ensuring opportunities are taken to optimise solar energy generation through the site layout, building orientation and design;
- Providing high quality sustainable travel options for day-to-day needs via convenient walking, wheeling and cycling roues and catchments and easy access to public transport;
- Incorporating appropriate landscaping and urban greening;
- Ensuring that the design includes an assessment of and response to existing hydrological characteristics to ensure the sustainable management of water in the design of a site and Sustainable drainage must be considered at the outset of the design process and integrated with the site landscaping, including tree-lined streets.









HOUSING

PfE Policy JPA9 allocates Walshaw for a new residential-led community. In accordance with Policy JPA9 up to 1,250 new homes should be delivered to diversify the type of accommodation in Walshaw.

Development should offer a broad mix of house types and sizes, including delivering high quality and locally distinctive design. In addition to this, provision should also be made for custom and self-build plots (subject to local demand having regard to the Councils' self-build registers and other relevant evidence) as well as specialist and older persons housing, having regard to the latest Housing Needs and Demand Assessment.

In accordance with PfE Policy JP-H3, all new dwellings must comply with the nationally described space standards and be built to the 'accessible and adaptable' standard in Part M4(2) of the Building Regulations unless specific site conditions make this impracticable.

The delivery of homes to meet the optional standard in Building Regulations Part M4(3) of the Building Regulations (or any subsequent revisions to the standard) is encouraged.

Affordable Housing

Criterion 5 of PfE Policy JPA9 states that development in this allocation will be required to make provision for affordable housing in accordance with local planning policy requirements, equivalent to at least 25% of the dwellings on the site and across a range of housing types and sizes (with an affordable housing tenure split of 60% social or affordable rented and 40% affordable home ownership).

Development proposals should include the provision of affordable housing in line with the requirements of PfE Policy JPA9, across a range of house types, sizes and affordable tenures, and have regard to the latest Housing Needs and Demand Assessment. It should be fully integrated throughout the site unless there are specific circumstances that warrant otherwise and it should be indistinguishable from the market housing and built to the same specifications (i.e. not separate house types for affordable homes), unless there are particular reasons not to do so (e.g. if there is a specific requirement from a Registered Provider).

Provision for Specialist and Older Persons Accommodation

Provision should be made for specialist and older persons' accommodation to contribute to meeting identified needs in the latest Housing Needs and Demand Assessment. Specialist and older persons' housing should be in an appropriate location to meet the needs of future residents.

All planning applications should demonstrate how provision for specialist and older persons accommodation is being made

Character and Density

The density and character of new residential development will be shaped by:

- Characteristics and constraints at different locations, both within the site and within the surrounding context; and
- The need to deliver sustainable forms of development including efficient use of land, management of environmental impact and promoting travel by non-car modes.

The approach to residential density should in accordance with PfE Policy H4, with the highest densities delivered in the most accessible locations. Development should maximise the opportunity to create sustainable homes in walkable neighbourhoods.

To optimize densities within the site, residential uses will also be acceptable in principle, on the upper floors of retail and community uses.

Such differentiation in density is essential to help create a varied mix of residential forms and typologies, helping to ensure a choice of housing while delivering an efficient and sustainable use of land.

ACCESS HIGHWAYS AND TRANSPORT

Development at Walshaw represents a significant opportunity to deliver new strategic highway infrastructure and sustainable transport connections, providing relief for existing parts of the highway network, as well as providing sustainable access to the site and its new neighbourhoods and facilities.

All development within the allocation should be structured around a clear, coherent movement network that is resilient to an increasing quantum of development over time. This will be a legible and safe network both in its 'incomplete' early phases and incrementally through to final completion.

Development within the allocation should:

- Deliver a street hierarchy within the site that is in line with local design standards and that is capable of accommodating buses, with provision of bus stops and related infrastructure at optimum locations, and provision for active travel;
- Provide primary routes from the key vehicular access points connecting the development with surrounding area;
- Ensure high quality, convenient, safe and attractive walking, wheeling and cycling routes where appropriate, into and throughout the site and, in particular, towards bus stops;
- Provide off-site transport mitigation measures to enable accessibility and mitigate highways impacts arising from the development; and
- Ensure that flood risk on-site and off-site from highways works is not increased and where possible a betterment is provided.

Access and Strategic Through Road

To connect the site with the local highway network a new multi-functional strategic through road will provide new highway provision and public transport routes providing an alternative to the existing constrained highway network at Church Street, Bank Street and High Street. The strategic through road will also provide access to development parcels within the site and will provide some of the key active travel routes through the site. Rat-running through the site must be avoided.

The key access points on the through road are:

- Junction at Scobell Street/ Church Street and Booth Street
- North of Walshaw Road
- South of Walshaw Road
- Junction at Lowercroft Road

Additional points of emergency vehicular access may also be acceptable.

The design of access junctions should be informed by a Transport Assessment, Traffic Modeling and Traffic Surveys, prepared to support planning applications. This will ensure that the appropriate design, type and size of junction is provided – in accordance with PfE Policy JP- C8 (Transport Requirements of New Development).

The internal road hierarchy and layout should be designed in accordance with PfE Policies JP-C1 (An Integrated Network), JP-C5 (Streets for All) and JP-C8 (Transport Requirements of New Development), as well as other relevant guidance, including the Greater Manchester Streets for All Design Guide.

To prevent rat-running and ensure delivery of the through road, any proposed north-south estate roads shall not be fully connected unless or until the full strategic through road is operational.

The strategic through road is a critical and essential highway mitigation measure that is required to allow for the full quantum of development from the site to be delivered.

The scale and location of residential development within the allocation will be co-ordinated with the delivery of the Strategic Through Road.

Further details regarding this will be determined by site wide and plot specific Transport Assessments submitted with all planning applications which will also be used to update the Infrastructure Delivery and Phasing Strategy for the site.

Highways

Residential development at Walshaw must be integrated with the wider highway network. All development within the allocation will be expected to have regard to the off-site highway mitigation works listed in Appendix D of PfE (together with any additional necessary measures identified through Transport Assessments) to enable accessibility and mitigate highways impacts arising from the development. These include:

- Crostons Road/ Tottington Road junction
- Tottington Road/Walshaw Road priority junction
- A58 Bolton Road / Ainsworth Road junction improvement
- A58 Bolton & Bury Road/Starling Road junction improvement

Parking

Car and cycle parking, including Electric Vehicle (EV) charging facilities will be expected at key public facilities including the local centre and school in accordance with PfE Policies JP-C5 (Streets for All), JP-C6 (Walking and Cycling) and JP-C8 (Transport Requirements of New Development) and any associated guidance, including the Parking Standards in Bury SPD11 (June 2025).

Active travel & Movement

The promotion of sustainable modes of transport and permeable connections will be critical for the delivery of the Walshaw site.

Development should be designed to ensure ease of walking, wheeling, and cycling movement through the site.

Active travel infrastructure in accordance with LTN1/20 and other relevant design guidance will be required to be delivered both within and outside the site where possible to support sustainable travel connections.

All development within the allocation should seek to conserve existing public rights of way (with diversions as appropriate) and improve walking, wheeling and cycling connectivity for both active travel and recreation.

The indicative masterplan presented in Chapter 6 identifies a network of dedicated active travel routes designed to permeate the development, including direct links between the local centres and schools. These routes offer the quickest and most direct way to access key destinations, day-to-day needs as well as direct connections to surrounding areas by non-car modes.

The proposals identify a hierarchy of routes including:

- Strategic Through Road
- Primary Street
- Residential Street

Further details can be found in chapter 6 ('Masterplan').

The approach to active travel should have particular reference to PfE Policies JP-C5 (Streets for All), JP-C6 (Walking and Cycling) and JP-C8 (Transport Requirements of New Development). Active travel infrastructure may be required to be delivered in the immediate vicinity of the site and outside of the allocation, to support sustainable travel connections.

Public Transport

Accessibility by bus will be key to the sustainable development of the site. The Greater Manchester Bus Strategy has an aim for 90% of Greater Manchester's population to be within 400m of a 30-minute bus service.

Consideration will need to be given to the location of bus stops along the strategic through road having regard to bus stop catchment areas. Active travel routes to and from bus stops, the nature and location of crossing points on the strategic through road and whether on-road bus stops or bus laybys are preferred will be determined at planning application stage.

All development within the allocation will be expected to contribute to bus infrastructure and services.

ECOLOGY

The masterplan has been prepared around existing ecological features across the whole site and has considered the existing green and blue infrastructure throughout.

Wildlife Corridor

A designated wildlife corridor runs across the southern part of the allocation

Saved Policy EN6/4 of the adopted Bury Unitary Development Plan (UDP) relates to wildlife links and corridors and states that the Council will seek to consolidate and, where appropriate, strengthen wildlife links and corridors, and will not permit development which would adversely affect identified areas. In particular, the Council will seek to ensure that new development within or adjacent to identified links or corridors contributes to their effectiveness through the design, landscaping and siting of development proposals and mitigation works, where appropriate.

In addition, UDP Policy EN6/4 is supported by criterion 2 of Places for Everyone Policy JP-G8 (A Net Enhancement of Biodiversity and Geodiversity) which states that, through local planning and associated activities, a net enhancement of biodiversity resources will be sought, including, where relevant, by improving connections between habitats, to protect and enhance the provision of corridors, ecological networks (including Nature Recovery Networks) and steppingstones that enable the movement of species, especially as the climate changes. Criterion b of Policy JP-G8 also states that development will be expected to avoid fragmenting or severing connectivity between habitats.

In line with UDP Policy EN6/4 (and its supplementary guidance) and Places for Everyone Policy JP-G8, development in this part of the site will be expected to avoid fragmenting or severing this corridor and will need to contribute to its effectiveness through the design, landscaping and siting of development proposals and mitigation works.

Biodiversity

PfE Policy JP-G8: A Net Enhancement of Biodiversity and Geodiversity requires development to follow the mitigation hierarchy of:

- Avoiding significant harm to biodiversity, particularly where it is irreplaceable, through consideration of alternative sites with less harmful impacts, then
- Adequately mitigating any harm to biodiversity, then
- Adequately compensating for any remaining harm to biodiversity.

All ecological matters have informed the masterplanning of the Walshaw site and will continue to be considered throughout the planning process, including through any subsequent planning applications. Whilst the protection of ecological assets is clearly an important objective for planning, so too is the need to meet future development needs and planning can often face difficult choices around achieving an appropriate planning balance and the reconciliation of often competing interests.

An ecology strategy for the site will be required to be in accordance with PfE Policies, JPA9, JP-G7 (Trees and Woodland) and Policy JP-G8 (A Net Enhancement of Biodiversity and Geodiversity) and should focus on protecting key habitats and species, following best practice through implementation of the mitigation hierarchy and integration and enhancement at Walshaw and Elton Brooks.

Providing enhanced areas of green space and key landscaping will provide space for BNG to be addressed. However some multi-functional greenspaces are not suitable for BNG delivery due to the potential conflict of human interference with habitats (dog walking, play, sports). Each planning application will deliver the required 10% BNG and on site BNG will be optimised but it is likely that off-site measures will be required. These will be delivered in the first instance through Bury Council's local offsetting capacity, supplemented by strategic offsetting sites if needed.

Further ecological surveys and strategies should be submitted with all planning applications within the site to ensure that these reflect the latest position. The following principles must be adhered to in all ecological strategies and these should be in conformity with a site wide ecology strategy:

- Conservation of breeding birds including new habitat creation and habitat enhancement;
- Conservation of bats, including new habitat creation and habitat enhancement;
- Avoidance, mitigation and / or compensation for any harm caused to SBIs, including indirect

harm (e.g. increased recreational pressure);
- Site-wide conservation strategy for amphibians;
- Protection of Badgers; and
- Co-ordinated management of invasive species.

Maintenance & Management

The long-term positive management of green spaces and in particular the retained and newly created habitats, should be secured through a Landscape and Habitat Management Plan (LHMP). This plan should also cover any off-site habitats delivered as part of the BNG and mitigation strategy. Ongoing monitoring will be embedded within the LHMP to track habitat condition, species use and the effectiveness of management measures. Results will be regularly reviewed, allowing management practices to be adapted as necessary to ensure long-term ecological benefits are achieved.

An Access Management Strategy should be prepared to guide where public access is encouraged, controlled or restricted, depending on ecological sensitivity and functional objectives. This will be particularly important for preventing disturbance to breeding and wintering birds.

SUSTAINABILITY, ENERGY & CARBON REDUCTION

Greater Manchester's ambition is to become a carbon neutral city region by 2038. This ambition is supported by Bury Council through a declaration of a climate emergency.

Walshaw offers the opportunity to support Bury and Greater Manchester's commitment to net zero through the delivery of a sustainable, low carbon neighborhood. PfE Policy JP-S2 sets out the design and development standards to support sustainability objectives including promotion of low carbon development and renewable and low carbon infrastructure.

Applications for the development of the site should adopt a fabric-first approach to minimise carbon emissions and energy demand, with buildings incorporating renewable technologies, promoting efficient water and energy use, and support the transition towards net-zero carbon. Further detail on this can be found within chapter 9 (Sustainability Strategy).

FLOOD RISK AND DRAINAGE

The site provides many opportunities for sustainable water management and to incorporate multi-functional SuDS features, particularly around Elton Brook and Walshaw Brook.

A site-wide drainage strategy must be developed with a holistic approach to ensure that each development parcel has suitable water storage to operate independently and as part of the whole development.

The drainage strategy should incorporate SuDS attenuation ponds to manage water. These should discharge at a restricted surface water discharge rate to Walshaw Brook (north of Walshaw Road) and Elton Brook (south of Walshaw Road).

The strategy for storm drainage must compliment the existing network, by conveying flows to the existing watercourses. The new drainage network should incorporate flow restrictions and SuDS design principles to manage and minimise peak surface water runoff and mitigate water quality risks.

Water quality must be a key consideration throughout the site. Water quality treatment should be incorporated at source to reduce the impact of any contaminates on site, in accordance with PfE policy JP-S4 and water quality standards.

Individual planning applications for development within the site must be accompanied by a Flood Risk and Drainage Assessment and Strategy, in accordance with PfE Policy JP-S4 (Flood Risk and the Water Environment) and the North West River Basin Management Plan.

Individual Flood Risk and Drainage Assessment and Strategy must include the following principles:

- Ensure that individual flood risk and drainage proposals are in line with the site-wide strategy;
- Locate and design development to minimise the impacts of current and future flood risk to increase resilience to flooding.
- Maintain greenfield run-off rates through the incorporation of attenuation features across the site;

- Drain impermeable areas via an adoptable surface water drainage network, attenuated into strategic basins, controlled and discharged at greenfield discharge rates to existing watercourses.
- Ensure that sustainable drainage systems are designed in accordance with GM SUDS Design Guidance to provide multifunctional benefits wherever possible, including for water quality, nature conservation and recreation. Avoid adverse impacts on water quality and any possibility of discharging hazardous substances to ground.

HERITAGE

PfE Policy JPA9 requires development to take appropriate account of relevant heritage assets, and their setting, including the Christ Church Grade II* Listed Building, in accordance with Policy JP-P2;

Development within the allocation must respect the views and setting of the church are enhanced.

To ensure the development does not disrupt the view of Christ Church from Walshaw Road, the indicative masterplan shows the provision of green space between the Church and development parcels.

Full archaeological studies will be requires to support planning applications within the site.

EDUCATION

PfE Policy JPA9 requires the 'provision of one new one-form entry primary schools to meet needs generated by the development, in accordance with PfE Policy JP-P5 as well as a financial contribution towards secondary school provision to meet needs generated by the development, in accordance with policy JP-P5'. Further details regarding contributions can be found in SPD17.

In recent years, there has been a sustained decline in the birth rate in Bury and the number of primary school children living in Bury is projected to fall in the medium term. Consequently, in terms of primary school provision, it is now clear that some surplus capacity has emerged within the locality which could assist in absorbing the demand generated by pupils located within the early phases of the development. However, given the scale of the site there is insufficient capacity in surrounding schools to accommodate the full expected pupil yield, a new school within the development is required.

A new one-form entry primary school is proposed in the north of the allocation close to the Local Centre ensuing convenient connections for residents. The school location will seek to reduce reliance on car travel for short trips and support walking and cycling to school.

The precise timing of delivery of the primary school will be determined by the Council's Education Needs and Demand Assessment, which will also be used to update the Infrastructure, Phasing and Delivery Strategy for the site.

Financial contributions for off-site additional secondary school provision to meet the needs generated by the development will also be sought.

HEALTH

PfE Policy JP-P6 relates to how new developments should contribute to improved health outcomes and requires the provision of new or improved health facilities proportionate to the additional demand generated by the development. The level of housing growth planned at Walshaw will require the improvement of off-site primary care facilities to cope with the needs generated by the development site, in accordance with policy JP-P6.

The Council will continue to work closely with the Greater Manchester Integrated Care Board's (ICB) Primary Care and Estates teams for the Bury Locality to confirm that off-site provision aligns with the ICB's Infrastructure Strategy, investment plans, and specific priorities for the Bury Locality. The ICB is committed to making more efficient use of the existing estate and in supporting Primary Care Networks and their practices to use existing larger, purpose-built health facilities where possible. Because the existing primary care estate is well-located in relation to the Walshaw site, it anticipated that financial contributions will be based delivering the required additional capacity via refurbishment, reconfiguration and/or extension of existing facilities.

LOCAL CENTRE

PfE Policy JPA9 requires the 'provision for a new local centre in an accessible location which includes a range of appropriate retail and community facilities required to serve purely local needs and ensure that it is integrated within existing communities'.

Any retail development within the Local Centre should be of a scale that serves the needs of the surrounding neighbourhoods to avoid it generating vehicular traffic from the wider area.

The location of the local centre provides strong walking and cycling permeability from all areas of the site which boosts liveability and supports PfE health policy (JP-P6.

OPEN SPACE, SPORT AND RECREATION

Criteria 9 of PfE Policy JPA9 requires development to 'make provision for new, high quality, publicly accessible, multifunctional green and blue infrastructure within the allocation including the integration and enhancement of the existing green infrastructure corridors and assets at Walshaw and Elton Brooks.

Saved Policy RT2/2 of the adopted Bury Unitary Development Plan (UDP) relates to recreation provision in new housing development and states that developers of new housing on sites of 10 or more dwellings will be expected to provide for the recreational needs of the prospective residents. This Policy is supported by supplementary guidance (SPD1) which provides more detailed advice on the implementation of the Policy.

All planning applications should demonstrate how the recreational needs of prospective residents will be met, particularly through on-site recreation provision in the first instance and then through improvements to existing facilities commensurate with the demand they would generate.

Broadly, the sport and recreation demands arising from a new residential population of 3,000 people at Walshaw is likely to be:

- 2.4ha of parkland,
- 12.33 ha of natural and semi-natural green space,
- 1.92ha of amenity green space,
- 0.75ha of allotment provision,
- 0.75ha of children and young peoples play provision,
- Provision for Adult and Youth football (11v11); and
- Improvements to the quality of the small 3G facility at Walshaw Sports Club.

The masterplan for Walshaw includes a network of spaces totaling over 20ha, featuring new parks, gardens, and publicly accessible natural areas. These spaces will be integrated into the area's broader green infrastructure, offering both new residents and existing communities opportunities to enjoy the outdoors with planned routes and connections enhancing accessibility throughout.

The spaces vary in size and character, influenced by natural assets such as mature vegetation, water features, views, and biodiversity, while also incorporating new park amenities like play areas and food-growing spaces.

Opportunities for the dual use of facilities through new school provision should be explored along with the potential for improvements to the 3G provision at Walshaw Sports Club to help to accommodate mini formats of pitch sports.

It is anticipated that the long term positive management of the open spaces within the site will be secured through both a Landscape and Habitat Management Plan and the establishment of a Management Company to maintain the play areas, open spaces and parks.

GREEN BELT

PfE Policy JPA9 requires development to make provision for compensatory improvements to the environmental quality and accessibility of remaining Green Belt in the vicinity of the site in accordance with PfE Policy JP-G2.

The identification of compensatory improvements to the environmental quality and accessibility of the remaining Green Belt in the vicinity of the site must be submitted as part of a planning application.

TREES AND WOODLAND

PfE Policy JP-G7 requires development which would result in the loss of existing trees, to replace them on the basis of two new trees for each tree lost, or other measures that would also result in a net enhancement in the character and quality of the treescape and biodiversity value in the local area, with a preference for on-site provision.

An assessment of trees is expected to accompany all planning applications. Engagement with City of Trees as part of the planning process is recommended.

DIGITAL CONNECTIVITY

PfE Policy JP-C2 requires development to commit to ensuring that all new development has full fibre to premises connections, unless technically infeasible and/or unviable, and incorporate multiple-ducting compliant with telecoms standards, to facilitate future-proof gigabit-capable network connections.

It is expected that internet connections will be operational and immediately accessible to network providers when occupiers move into new properties. A digital connectivity statement is expected to accompany all planning applications.

MINERALS

PfE Policy JPA9 requires development to consider the extraction of any viable mineral resources within Mineral Safeguarding Areas, in accordance with Policy 8 of the Greater Manchester Joint Minerals Development Plan (or any relevant policies in subsequent minerals plans).

Details of minerals extraction is expected to accompany all planning applications, where required.

LANDFILL/ CONTAMINATION

Details of remediation and coal mining risk assessments are expected to accompany all planning applications, where required.

8.PHASING AND DELIVERY STRATEGY

The site provides a major residential-led development opportunity that is allocated to deliver up to 1,250 new homes, supported by community and other essential infrastructure. This Development Framework provides a high-level strategy and key principles for the future delivery of the full JPA9 allocation, whilst retaining flexibility to allow for opportunities across the site.

Given the size of the site, it will take several years for the site to be fully delivered and therefore it is important to develop a phasing and delivery strategy to bring the site forward. This phasing and delivery strategy will help to shape the parameters within which future planning applications will be brought forward and provides a holistic and coordinated approach to the delivery of on and off-site physical and social infrastructure. Development is expected to come forward in a series of phases alongside necessary infrastructure provision and a flexible approach is proposed in order to be responsive to opportunities.

To support the delivery of infrastructure across the site, an Infrastructure Phasing and Delivery Strategy ("IPDS") for the site will be prepared in accordance with the PfE Policy JPA9, JP-D1 and SPD18. This IPDS should be read alongside this SPD, noting that the IPDS is intended to be a "live document" that is continuously reviewed and updated as plans, evidence, infrastructure costs and the potential funding become available.

Planning applications within the site will be required to demonstrate how proposed development would assist in the delivery of key infrastructure, without compromising or prejudicing the comprehensive development of the site. Proposals will need to demonstrate how the development of individual parcels is consistent with the WDF and the IPDS and any other material consideration that may emerge. Importantly, planning applications should not sterilise, frustrate or otherwise constrain the delivery of other parts of the site or the delivery of essential infrastructure.

All development parcels will need to be sufficiently coordinated with appropriate infrastructure delivered at the correct time to support a sustainable and comprehensive development. Piecemeal planning applications which fail to deliver or contribute towards the wider strategic infrastructure will be resisted.

The strategic through road within the site is the key infrastructure requirement that will accelerate development and delivery of the site, opening out all development parcels and providing a new highway and public transport asset that will help movement through and around the site. Planning applications will be expected to demonstrate how delivery of housing and other development, including social infrastructure within the site, will be coordinated with the delivery of transport and other physical infrastructure that is needed to support it.

Ecological mitigation and the timely delivery of key green and blue infrastructure are fundamental to the successful phasing of the Walshaw site. Habitat and species protection, ecological connectivity and sensitive access management must be implemented ahead of, or in parallel with, development to ensure that early construction phases do not adversely affect retained ecological features. Early establishment of strategic green corridors will safeguard ecological function while providing the foundation for Biodiversity Net Gain delivery and high-quality placemaking.

The recreation and sports provision should be delivered alongside development to ensure that both demand is met and communities have the opportunity to connect with this infrastructure as the site becomes occupied.

KEY INFRASTRUCTURE REQUIREMENTS

Development proposals must:

- Ensure that they are acceptable in planning terms, such that they mitigate their on and off site impact in accordance with this Development Framework;
- Make an appropriate contribution to ensure delivery of the strategic infrastructure identified by the Development Framework; and
- Ensure that they will not prejudice the delivery of strategic infrastructure and development on third party land;

Infrastructure requirements to support Walshaw have been categorised as being either strategic infrastructure (primary infrastructure needed to support the full delivery of Walshaw) or local infrastructure (on-plot infrastructure delivered directly as a matter of course by each developer to meet the requirements of individual development plots).

Triggers for the strategic infrastructure will be identified through relevant and updated technical evidence. These triggers will also be included and refined through the IPDS and during pre-application discussions between applicants and the council, ensuring proper determination of the appropriate triggers for the delivery of infrastructure.

The Walshaw site is split into two broad 'zones', each of which will include multiple phases of development. These zones are shown in the adjacent plan and comprise:

- Northern Zone - 21.2 hectares delivering a mix of around 848 residential units;
- Southern Zone - 10.3 hectares, delivering a mix of around 412 residential units;

Development in both Zones will be required to contribute to the strategic infrastructure requirements identified in the table below.

STRATEGIC INFRASTRUCTURE REQUIREMENTS (SITE-WIDE)

Infrastructure Element	Infrastructure Requirement	Comments
Highways and Public Transport	A strategic through road to enable an alternative to Church Street, Bank Street and High Street	The through road will need to be operational at an appropriate time in the development programme to facilitate public transport and active travel through the site. The point at which this becomes necessary will be determined through a detailed Transport Assessment for the whole site and factored into planning applications as they come forward. When development commences (currently envisaged to commence in the Northern Zone) the TA will provide the evidence to determine the capacity of the junction/network in the relevant locations. The TA will identify when secondary access / egress will be required.
	Active travel network including cycleways and pedestrian links.	These will be required throughout the site and within both parcels. The primary active travel routes will run alongside the through road, ensuring connectivity with both zones. Each development plot will need to demonstrate linkages to the site wide network (existing and new as appropriate).
	Bus Stop Provision	Triggers to be determined through a Transport Assessment for the site and in conjunction with TfGM.
	Off-site highway improvements	Triggers to be determined through a Transport Assessment for the site.

Social Infrastructure	Primary School Provision (including new 1-form entry primary school)	Triggers to be determined by Bury Council's Education Needs and Demand Assessment in accordance with evidence of need for provision generated by the development.
	Secondary School Contributions	Triggers to be determined in accordance with evidence of need for provision generated by the development.
	Local Centre, including retail/ community facilities	Triggers to be determined through up-to-date needs assessments.
	Health Provision	Triggers to be determined in accordance with evidence of need for provision generated by the development.
Environmental Infrastructure	Green infrastructure including public open spaces, recreation provision, sports facilities and playgrounds	Triggers to be determined by Bury Council Open Space Assessment (2026) and the Council's Playing Pitch Strategy.
	Surface water attenuation and SuDS, integrated with areas of green infrastructure.	Triggers to be determined through a drainage strategy for the site.
	Measures to protect hydrology and water quality	Triggers to be determined through a drainage strategy for the site.
	Nature areas, ecological mitigation and biodiversity net gain.	Triggers to be determined through an ecology strategy for the site.

LOCAL INFRASTRUCTURE (ON-SITE)

In addition to the strategic infrastructure requirements above, each development proposal coming forward in the site will be required to provide specific necessary infrastructure to allow it to come forward. Whilst there may be some bespoke requirements on some development parcel , it is likely that the following will be required on each plot:

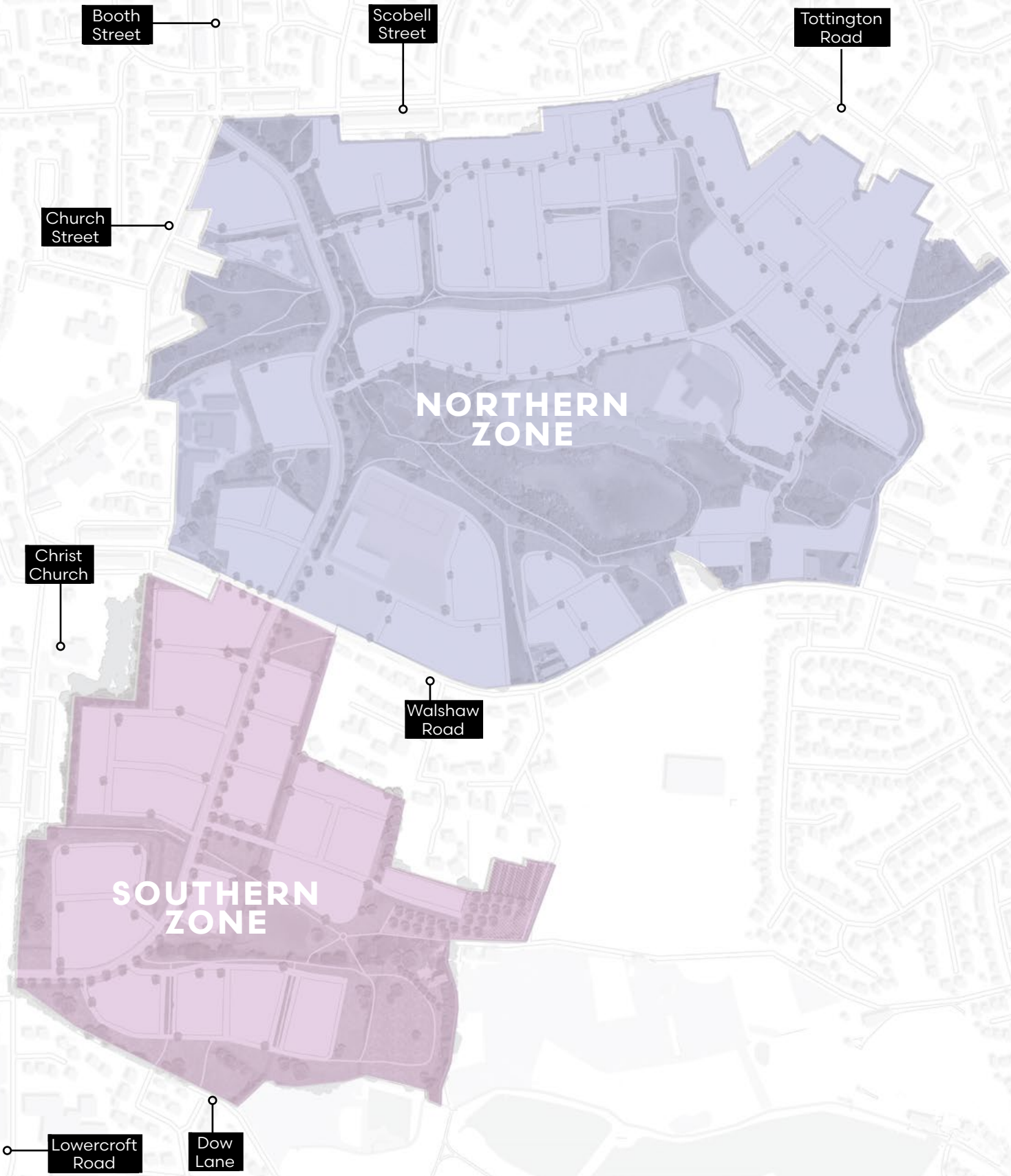
- Appropriate Access/ egress arrangements into the development plot from Booth Street/Church Street/ Scobell Street, Walshaw Road, Lowercroft Road or the proposed through road
- Active travel access from Booth Street/Church Street/ Scobell Street, Walshaw Road, Lowercroft Road or the proposed through road)
- Internal highways
- Internal walking and cycling routes
- Utilities
- Drainage (Surface water - Suds and attenuation ponds)
- Drainage (foul water)
- Water Supply
- Power Supply
- Telecoms Supply
- Noise and Air Quality mitigation
- Green Infrastructure

PHASING

Phasing of development, including the amount of development capable of being delivered within each parcel, will be informed by more detailed evidence on site conditions and capacity. Timing will be influenced by the delivery of the through road and the extent of available capacity within the surrounding highway network. This will need to be managed to ensure that highway and junction improvements are delivered outside of the site to accommodate additional movements.

All phases of development will be delivered in line with the comprehensive vision for the wider development, supporting the site-wide requirements for infrastructure, particularly with regards to the through road, active travel, public transport, education provision and greenspace.

FIGURE 37: PHASING AND DELIVERY PLAN



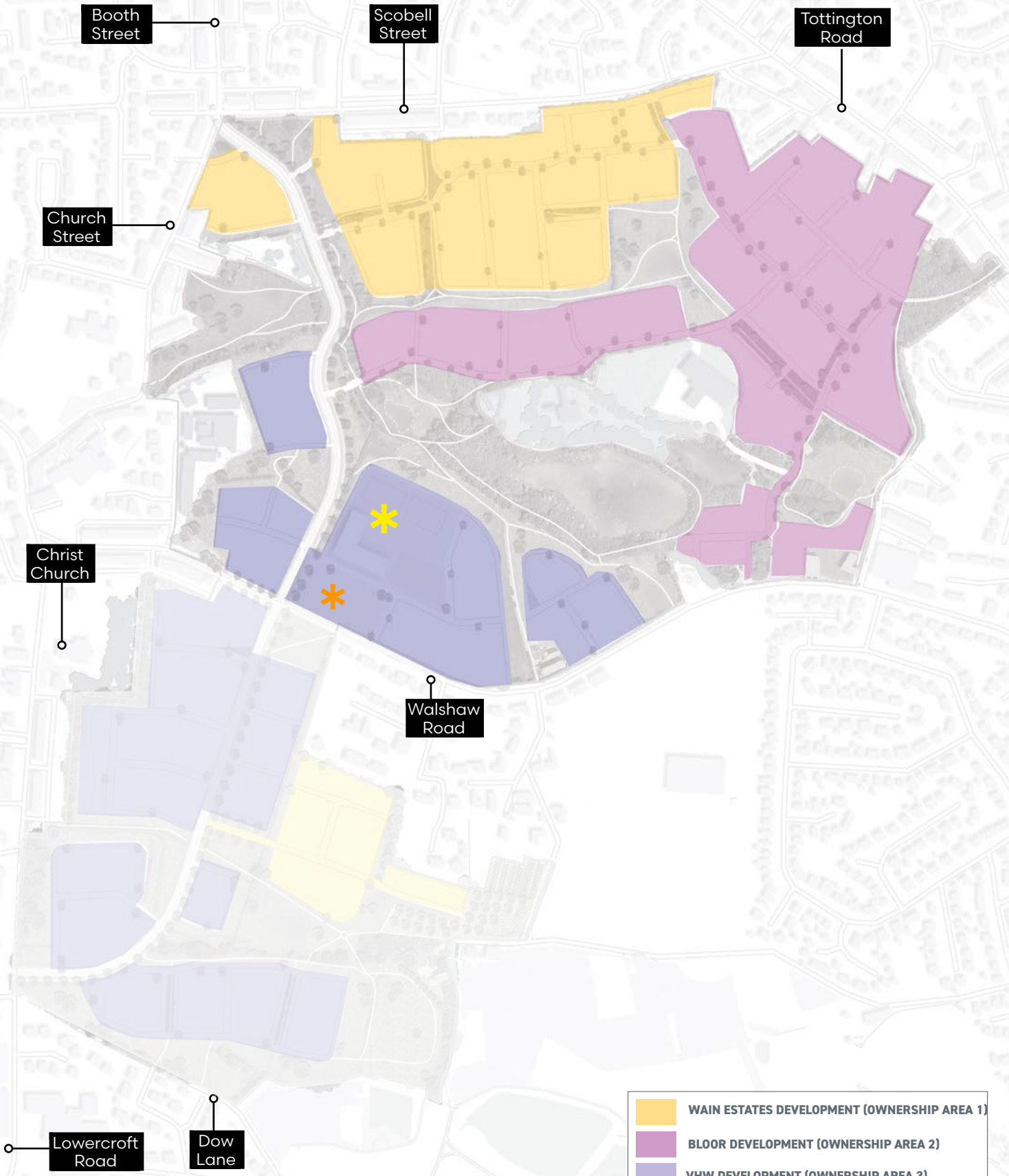
NORTHERN ZONE

It is envisaged that residential development will start in the Northern Zone of the allocation, with the key features in this area including:

- 21.2 hectares, delivering around 848 residential units;
- Affordable housing in line with PfE Policy JPA9;
- Primary access taken from reconfigured arrangements at the junction of Booth Street, Scobell Street and Church Street;
- New junction and access point designed to provide for movement throughout the whole allocation, providing connectivity to later phases in the northern zone as well as to the southern zone;
- Off-site highway and junction improvements
- Sustainable transport infrastructure, including provision for active travel routes throughout the northern zone (including links to the southern zone) and public transport;
- A new one-form entry primary school;
- A local centre, with community and neighbourhood retail facilities;
- Green space provision, including neighbourhood play spaces and new linear greenways linked to active travel routes throughout the zone, connecting into the southern zone and beyond;

The northern zone is in three separate ownerships and the three landowners are working together to bring the site forward. Ownership Areas are identified as 1, 2 and 3 on the following plan.

FIGURE 38: NORTHERN PARCEL PHASING AND DELIVERY PLAN



SOUTHERN ZONE

The southern zone is in two ownership areas as shown on the plan opposite.

The key features in the southern zone include:

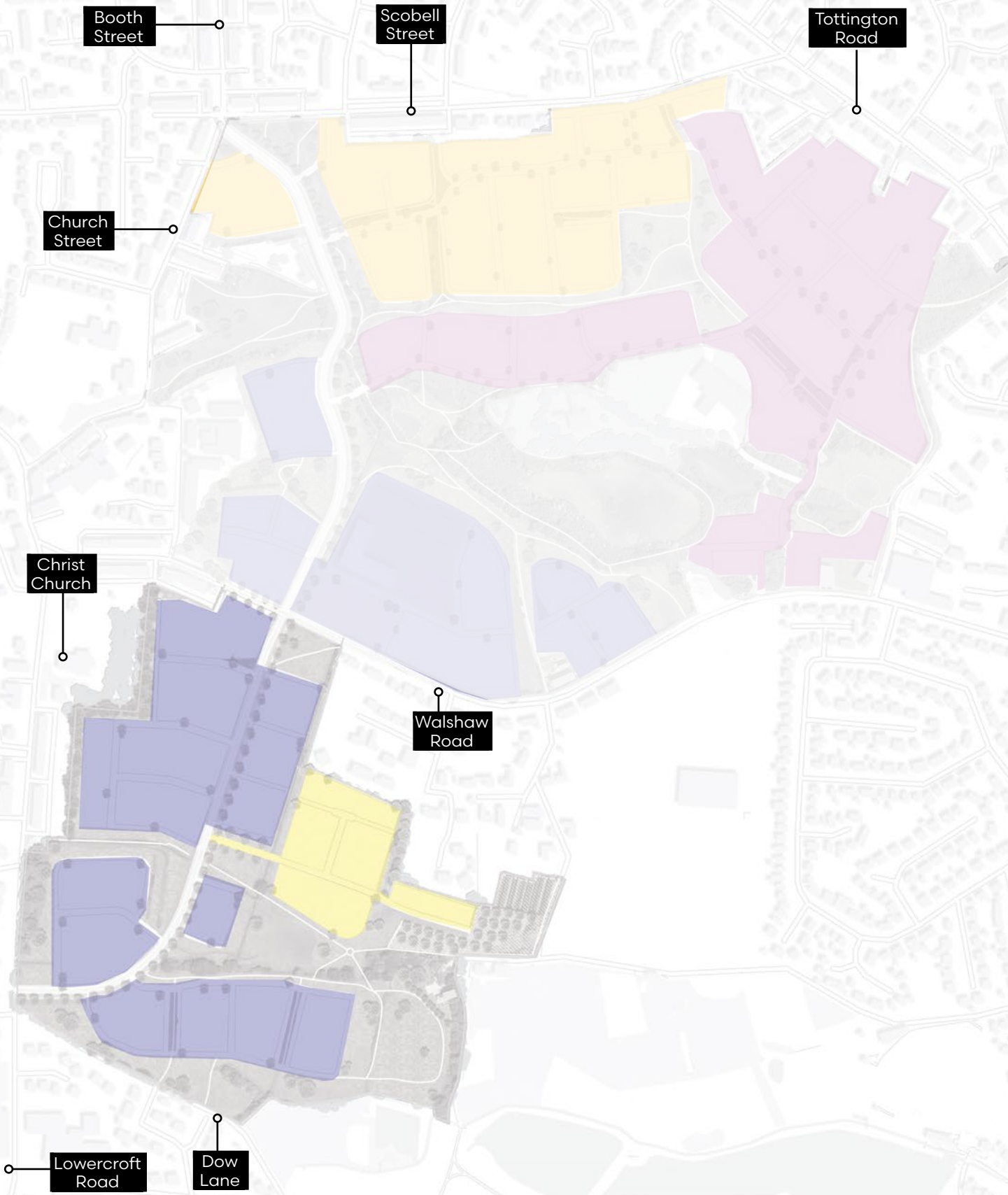
- 10.3 hectares, delivering around 412 residential units;
- Affordable housing in line with PfE Policy JPA9;
- Primary access to serve the zone will be taken from a new junction with Walshaw Road at a location that will serve as a continuation of strategic through road through the northern zone;
- New junction and access point designed to provide for movement throughout the whole allocation, providing connectivity to later phases in the southern zone;
- Off-site highway and junction improvements;
- Sustainable transport infrastructure, including provision for active travel routes and public transport;
- Public open space and greenspace corridors provided in accordance with identified needs;
- Whilst it is currently anticipated that this zone will be part of the later development phases, it could potentially come forward earlier. Given it is separated from the northern zone by Walshaw Road this zone could be delivered independently, albeit this will include the southern stretch of the wider strategic through road.

The Walshaw consortium is working together to bring forward the allocation. The sequencing of development within either the northern or southern zone remains flexible and will be developed further in the IPDS. In line with the table above, the phasing of development within the allocation will need to reflect updated evidence and technical studies including the capacity of the existing highway and the need to ensure the Strategic Through Road is delivered as early and effectively as possible. This will be tested through detailed transport modelling and controlled through planning applications and any subsequent planning conditions and/or legal agreements.

Similarly, phasing of development will be informed by the Council's Education Needs and Demand Assessment to ensure that appropriate education facilities and capacity is in place and available before existing schools in this part of Bury West reach their pupil capacity.

Delivery of the new Local Centre should be completed to coincide with the delivery of the Strategic Through Road in the northern zone in order to provide accessible facilities for the new residents and avoid the need for trips to access facilities elsewhere.

FIGURE 39: SOUTHERN PARCEL PHASING AND DELIVERY PLAN



SUMMARY

The approach to phasing set out in this WDF is not intended at this stage to be chronological. Instead, the phasing and delivery approach outlined above, reflects a natural and logical way the site could come forward physically given the spatial principles established by the WDF and infrastructure integrated within it coupled with the aspiration to deliver the site successfully.

Due to the scale and nature of the proposed uses, and the timescales within which it is anticipated to be delivered, the WDF needs to be robust as well as flexible. The WDF provides suitable controls and principles to guide future proposals and to manage design qualities, whilst being able to adapt to changing market conditions, site constraints, and opportunities to accelerate delivery. The phasing and delivery strategy outlined does not restrict the potential for zones to be accelerated where opportunities arise, or where infrastructure needs change or allow zones to be advanced earlier than currently envisaged.

The phased delivery of Walshaw will be kept under review and will be informed by up-to-date evidence prepared to support future planning applications and the IPDS. Triggers for the strategic infrastructure will be identified through relevant and updated technical evidence.

FUNDING

A range of funding and delivery mechanisms will be required, including:

Planning conditions and Section 106 Agreements to secure on-site infrastructure: to secure the delivery of on-site infrastructure required to deliver development.

Developer contributions secured via Section 106 and Section 278 Agreements to support off-site infrastructure: Developer contributions and/or delivery of infrastructure off-site will be secured to assist in mitigating the impact of the development (or relevant phase of the development). In line with the CIL Regulations, contributions will only be sought where they are necessary to make the development applied for acceptable in planning terms, and will be fairly and reasonably related in scale to the development.

In addition, and where appropriate, sources of public sector funding will be investigated to assist or accelerate the delivery of strategic infrastructure.

EQUALISATION

Equalisation is a mechanism to ensure the fair and proportionate distribution of the necessary costs of the strategic infrastructure requirements, regardless of which specific land parcel is developed. This approach seeks to avoid the costs falling disproportionately on early phases of development or being pushed back to later phases, which would be to the detriment of the comprehensive delivery of the site.

An equalisation approach will be followed in respect of the Walshaw site. This means that all development proposals within the site must contribute to the strategic infrastructure in a fair and proportionate manner.

Details regarding the mechanism for identifying fair and proportionate contributions will evolve through the IPDS and any associated documentation to support the delivery of the site.

In line with the Planning Practice Guidance, land values within the site should reflect the requirements to fund strategic and plot-specific infrastructure and mitigation.

The IPDS will continue to be updated to reflect the costs of wider infrastructure requirements for the site as they are understood and will expand upon the approach to equalisation through the contributions to be sought.

Pre-application discussions with the council will refine local infrastructure requirements, which will be additional to those site-wide strategic infrastructure components that all developments should contribute towards.

9.SUSTAINABILITY STRATEGY

DELIVERING LOW CARBON, SUSTAINABLE HOMES

Greater Manchester's ambition is to become a carbon neutral city region by 2038. This ambition is supported by Bury Council through a declaration of a climate emergency. Achieving this goal will reduce the need for buildings and homes to be retrofitted in future to achieve carbon neutral goals set by Greater Manchester and the UK.

Strategic Objective 7 of PfE 'playing our part in ensuring that Greater Manchester is a more resilient and carbon neutral city region' includes two specific themes of relevance to this Chapter which are to:

- Promote carbon neutrality of new development by 2028; and
- Improve energy efficiency and the generation of renewable and low carbon energy.

The Walshaw site provides an opportunity to support Bury and Greater Manchester's commitment to net zero through the implementation of the policies within PfE and the delivery of low zero carbon and highly sustainable homes.

This Chapter focuses on the expectations and likely benefits from the Walshaw site with respect to carbon, energy, resource efficiency and climate resilience which, collectively, would make a significant contribution to climate change mitigation and address the impacts of climate change. The specific policies within PfE that are relevant to this sections and are considered in turn below are:

- Policy JP-S1: Sustainable Development
- Policy JP-S2: Carbon and Energy
- Policy JP-S3: Heat and Energy Networks
- Policy JP-S4: Flood Risk and the Water Environment
- Policy JP-S6: Resource Efficiency.

CARBON AND ENERGY

Policy JP-S2 includes an expectation that new development will be net zero in a phased approach, unless it can be demonstrated that this isnot practicable or financially viable:

(a) From adoption (2024) – regulated operational carbon emissions:

When the amount of carbon emissions associated with the building's operational energy on an annual basis is zero or negative. A net zero carbon building is highly energy efficient and powered from on-site and / or off-site renewable energy sources, with any remaining carbon balance offset.

(b) From 2028 – the above plus all emissions 'in construction': When the amount of carbon emissions associated with a building's materials and construction stages up to practical completion is zero or negative, through the use of offsets. For clarity, construction carbon is defined as life stages A1-A5.

Policy JP-S2 takes the definition of Net Zero Carbon from the UK Green Building Council (UKGBC) Net Zero Carbon Buildings Framework (UKGBC Net Zero Carbon Buildings Framework (2019)).

The UKGBC Framework is due to be superseded by the emerging UK Net Zero Carbon Building Standard (UK Net Zero Carbon Building Standard). Implications of this change will need to be considered once the UKNZCBS is launched.

The GMCA has published guidance on the application of its approach to net zero. These are considered in the following pages.

NET ZERO IN OPERATION

The GMCA Net Zero Design Guidance states that for Applicants to comply with Policies JP-S2 and JP-S3, all new buildings should be designed and built to be Net Zero Carbon in operation in compliance with the following where practical and viable:

(a) Fabric efficiency

- Space heating demand of ≤20kWh/m2/year for houses.
- Space heating demand of ≤15kWh/m2/year for flats.

(b) Energy use and carbon emissions

- BREEAM 'Excellent' standard (or equivalent) for the 'Ene 01 –reduction of energy use and carbon emissions' credit issue is achieved, rising to BREEAM 'Outstanding 'equivalent from 2028.

(c) Energy Use Intensity (EUI)

- EUI of ≤35kWh/m2/year for TANZ homes only.
- EUI to be calculated using appropriate methodology e.g. CIBSE TM54.

(d) No fossil fuels and low carbon heat

- The energy strategy will be all-electric to ensure that energy demand is met through the increasingly decarbonising electricity grid.
- It is expected that heat pumps will be used to deliver the space heating and cooling demand.

(e) On-site renewable energy generation and energy balance

- Roof mounted solar photovoltaics will be prioritised.
- Residential development should aim to provide PV equivalent to 40% footprint area.

(f) Offsetting (as last resort)

- To be used where practical and viable via a fund which will be developed by Bury Council.
- It is not expected that emissions associated with unregulated energy will be offset.

Additional requirements listed within the GMCA Net Zero Design Guidance include:

(a) Upfront embodied carbon reporting (See Net Zero in Construction below).

(b) Overheating risk reduction

- Residential uses should avoid mechanical cooling.
- Non-residential uses should pass CIBSE TM52.

(c) Reporting energy consumption in-use

As the GMCA Net Zero Design Guidance is not incorporated into PfE, the targets included are aspirational but will be used to guide the design and construction of new developments. The exception is the space heating demand targets, which are included within Policy JP-S1 as best practice thresholds and will be applied where practical and viable.

NET ZERO IN CONSTRUCTION

The GMCA Net Zero Design Guidance includes aspirational targets for residential development as follows:

- 500kgCO2/m2 for homes
- 600kgCO2/m2 for flats

No targets are provided for non-residential development.

Reductions in construction carbon will focus on material efficiency (e.g. 'use less') in the first instance, before exploring the use of low carbon and innovative materials.

CARBON OFFSETTING

Where a development cannot achieve net zero requirements or targets, carbon offsetting will be considered; this involves a financial contribution to mitigate or compensate for the effects of unavoidable carbon emissions by investing in an off-site scheme which reduces or remove greenhouse gases elsewhere, such as tree planting or renewable energy.

In collaboration with the GMCA, Bury Council is developing a Carbon Offset Fund to enable applicants to contribute to and achieve Net Zero Carbon where practical and viable.

HEAT AND ENERGY NETWORKS

Walshaw falls within a Heat and Energy Network Opportunity area, as designated by PfE Policy JP-S3

As part of any planning applications, a Low Carbon Heat Appraisal will be prepared setting out a comparative analysis of feasible heating systems, and proposals for a heating strategy which is practical and delivers

carbon savings over the course of its operation. If the Applicant can demonstrate that an alternative energy strategy will deliver the same or greater carbon savings and / or financial savings or such network connection would not be practicable or financially viable, then this will be considered opportunities for smart energy networks should also be considered, including:

- Energy demand and generation balance
- Energy storage
- Microgrid(s), and
- Electric vehicle charging strategy.

RESOURCE EFFICIENCY

Circular economy is a key part of GM's ambition to be a carbon neutral and leading green city region by 2038, and Walshaw will have a role in supporting this.

PfE Policy JP-S6 (Resource Efficiency) requires development to use sustainable design and construction techniques to reduce carbon emissions, adapt and future proof to the impact of climate change, reduce and recycle waste and minimise water use.

It is expected that circular economy measures implemented in the development will include, but are not limited to:

- Material efficiency, minimising the quantity of materials used in construction
- Use of recycled materials and materials with a high recycled content
- Use of materials which can be repurposed or recycled at end of life
- Resource (energy and water) efficiency measures during construction and operation, and
- Reduction of waste generated during construction and operation, and diversion of residual waste from landfill.

CLIMATE RESILIENCE

GM will experience changes to climate in the future, including:

- Increased annual temperatures
- Increased winter rainfall, and
- Decreased summer rainfall.

Impacts associated with these changes to climate and measures to mitigate them are set out within PfE Policy JP-S4. Development will demonstrate how climate adaptability and resilience measures have been incorporated through design measures which are appropriate for Walshaw. Design measures expected to be implemented on site include:

- Reducing overheating risk through passive measures in the first instance, using active cooling where necessary.
- Reducing flood risk through Sustainable Drainage Systems (SuDS), without significantly increasing embodied carbon emissions.
- Incorporating green and blue infrastructure to mitigate overheating, flood risk, and contribute to biodiversity.
- Minimising water use during operation through reducing water demand and incorporating rainwater or greywater harvesting, and
- Appropriate landscaping strategy which suits current and future climate scenarios and doesn't rely on mechanical irrigation.

ENVIRONMENTAL ACCREDITATION

PfE Policy JP-S2 requires any non-residential development should achieve a minimum of BREEAM 'Excellent' standard (or equivalent) for the 'Ene 01 – reduction of energy use and carbon emissions' credit issue, rising to BREEAM 'Outstanding' equivalent from 2028.

BREEAM provides a holistic approach to demonstrating sustainability, including categories in Energy, Water, Materials, Waste, and Pollution. The assessment process provides a robust approach to carbon and energy, resource efficiency, and climate resilience.

Applicants are therefore encouraged to pursue certification under BREEAM for non-residential uses over 1,000sqm.

Where feasible and viable, additional accreditation is encouraged to demonstrate the sustainability credentials of the site.

10.BENEFITS

SOCIAL BENEFITS

EDUCATION

Provision of a new one-form entry primary school and financial contributions towards off-site secondary school places.

LOCAL CENTRE

Provision of a new local centre in an accessible location to provide a range of retail and community facilities required to serve local residents.

AFFORDABLE HOUSING

Provision for 25% of the new homes to be affordable - with a proposed housing tenure split of 60% social or affordable rented and 40% affordable home ownership.

ENVIRONMENTAL BENEFITS

GREEN & BLUE INFRASTRUCTURE

Appropriate sustainable drainage infrastructure and open space provision will be provided to support the development of the site.

BNG PROVISION

The development will deliver at least 10% biodiversity net gain. The proposed landscape at Walshaw includes a network of spaces totaling over 20ha, featuring new parks, gardens, and publicly accessible natural areas.

ACTIVE TRAVEL ROUTES

Safe cycling and walking routes will be delivered through the site linking neighbourhoods with key destinations, including Leigh Lane and Dow Lane.

ECONOMIC BENEFITS

STRATEGIC THROUGH ROAD

New strategic highway infrastructure and sustainable transport connections, providing relief for existing parts of the highway network as well as providing sustainable access to the site and its new neighbourhoods and facilities.

OFF-SITE TRANSPORT AND HIGHWAY INFRASTRUCTURE

Provision of new and improved transport and highways infrastructure

CONSTRUCTION PHASE (INDICATIVE 8-YEAR PERIOD)

- Direct jobs: 285 with associated GVA of £125 million over the construction phase.
- Indirect jobs: 115 with associated GVA of £60 million over the construction phase.
- Total: 400 jobs with £185 million of associated GVA over the construction phase
- Total construction employment safeguarded in Bury: 200 jobs with £93 million of associated GVA over the construction phase.

ONCE COMPLETE AND OPERATIONAL

Resident Population: 3,125

- Resident economically active population: 1,444
- Resident economically active in employment population: 1,365

GVA from resident population in employment: £159 million per annum

Council Tax income: £4 million per annum

Household expenditure from new households: £33 million per annum

- Comparison goods: £13 million per annum
- Convenience goods: £8 million per annum
- Leisure: £12 million per annum

On-site Jobs (in local centre and 1FE primary school)

- 115 jobs with associated GVA of £7 million per annum.
- Employment effect to Bury = 60 jobs with associated GVA of £3 million per annum.

11.SOCIAL VALUE

Social value is about the positive impacts that can be delivered in society and is measured by the actions taken to improve community benefit.

There are notable inequalities within Bury's communities around levels of deprivation; health and life expectancy; employment; and educational attainment. The development at Walshaw will help to address these and can deliver social value for local communities.

Requirements for social value in planning have the power to unlock additional community benefit from the development which can contribute towards addressing some of the deep-rooted inequality issues.

To help to address issues around inequalities, it will be necessary for new development on the site to take all practicable measures to maximise its wider social value and its contribution to social inclusion. Opportunities to deliver social value through new development arise in both the construction and operational phases.

A key aspect of this is economic inclusion and ensuring that residents have the opportunity to share in the benefits of development and economic growth. For example, new development that includes effective initiatives around economic inclusion could help residents into employment and/or training, helping to tackle deprivation by raising people out of poverty and reducing inequalities, whilst benefiting the development directly through improved access to a larger, healthier and more highly skilled labour supply.

Planning applications for new homes within the Walshaw site will be expected to be supported by a Social Value Strategy. The production of a Social Value Strategy provides a mechanism for demonstrating how social value and social inclusion can be maximised, securing the implementation of suggested measures and enabling the public to understand the positive impact that new development will have on their neighbourhood and community.

The Council will positively engage in the production and implementation of their Social Value Strategies, but the involvement of other stakeholders, including local residents, is also strongly encouraged in order to maximise their impact and the acceptance of new development.



12.MONITORING AND REVIEW

This draft WDF provides a clear vision for the delivery of the Walshaw site. However, if circumstances change and have implications for the vision, design and development principles set out in this document, then a review of this document will be appropriate.

The scope and content of any review would be agreed and the updated WDF would be subject to a proportionate statutory and/or public stakeholder consultation prior to it being finalised.



Agenda Item 9

Classification: Open	Decision Type: Key

Report to:	Overview and Scrutiny (10th February) and Cabinet (11th February)	**Date:** 11 February 2026
Subject:	Draft Simister Bowlee Development Framework	
Report of	Leader and Cabinet Member for Strategic Growth	

Summary

1. The draft Simister Bowlee Development Framework (SBDF) sets out the masterplan and phasing strategy for the Simister Bowlee site. This is one of Bury's residential sites allocated through the Places for Everyone Joint Plan (PfE), which was adopted in March 2024.

2. A key requirement of PfE Policy JPA1.2 is that any proposals within the Simister Bowlee allocation must be in accordance with a comprehensive masterplan that has been agreed by Bury and Rochdale local planning authorities and that it shall include a design code and an infrastructure phasing and delivery strategy.

3. The draft SBDF establishes the key principles for the development of the site and establishes a framework against which future planning applications on the site will be considered. It sets out high level design principles and an approach to the delivery and phasing of the necessary supporting infrastructure. To give the SBDF appropriate planning weight in the decision-making process, it is proposed that it is formally adopted as a Supplementary Planning Document (SPD).

4. Overview and Scrutiny Members are asked to note the content of the Simister Bowlee Development Framework and provide feedback.

5. Cabinet members are asked to approve the draft SBDF for a 6-week period of consultation to establish stakeholder views on its content. Following consultation, all representations received will be fully considered and changes made where appropriate before the SBDF is brought back to Cabinet for approval to formally adopt it as an SPD.

Recommendation(s)

6. It is recommended that Overview and Scrutiny:

   i. Note the content of the Simister Bowlee Development Framework Supplementary Planning Document (Appendix 1);

ii. Provide feedback on the content of the Simister Bowlee Development Framework Supplementary Planning Document (Appendix 1)

7. It is recommended that Cabinet:

i. Approves the draft Simister Bowlee Development Framework Supplementary Planning Document (Appendix 1) as the basis for public consultation for a six-week period commencing on 13 February 2026.

ii. Delegates power to the Executive Director of Place to make minor non-material editorial amendments to the draft Simister Bowlee Development Framework Supplementary Planning Document before consultation commences.

Reasons for recommendation(s)

8. To enable stakeholders to have the opportunity to submit comments on the draft Simister Bowlee Development Framework and to comply with the statutory requirements for consultation.

Alternative options considered and rejected

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

Report Author and Contact Details:

Name: Cris Logue
Position: Assistant Director (Strategy, Planning and Regulation)
Department: Place
E-mail: c.logue@bury.gov.uk

Background

10. The Places for Everyone Plan (`PfE') is a joint development plan document of nine of the ten Greater Manchester authorities (excluding Stockport MBC) which was adopted on 21st March 2024.

11. It is a long-term plan for jobs, new homes and sustainable growth which allocates large strategic sites for employment and housing. This includes the residential allocation at Simister Bowlee (PfE Policy JPA1.2).

12. The Simister Bowlee site forms part of the wider 'Northern Gateway' development location that includes the nationally significant employment-led development opportunity to the north of the M62, allocated under PfE Policy Allocation 1.1: Heywood / Pilsworth (Northern Gateway) ("JPA1.1"), and subject to a separate SPD that was adopted in March 2025.

11 Simister Bowlee will deliver:

- 1,550 new homes
- 1,350 of these in Bury
- Affordable housing in line with policy (currently 25% - around 335 affordable homes in Bury)
- Specialist and older persons' accommodation
- New two-form entry primary school – located within the Bury part of the site
- New community and retail facilities to serve the needs of the new residents (and existing residents)
- New spine road through the site to provide access throughout the site and enabling active travel movement
- Off-site highway works to mitigate for the development
- Active Travel network including cycleways and pedestrian links
- Green infrastructure including public open space, sports facilities and playgrounds
- Ecological mitigation and biodiversity net gain
- Surface water attenuation, SuDS and measures to protect hydrology and water quality

13. The Simister Bowlee site provides the opportunity to deliver a comprehensive new neighbourhood that will support the sustainable growth of Atom Valley Mayoral Development Zone and the transformational employment-led opportunity within the wider Northern Gateway at JPA1.1

Simister Bowlee Development Framework (SBDF)

14. Following its adoption on 21 March 2024, the Places for Everyone Joint Development Plan (PfE) became a key part of Bury's statutory development plan alongside the saved policies of the Unitary Development Plan (UDP) and the Greater Manchester Joint Minerals and Waste Plans.

15. A key requirement of PfE Policy JPA1.2 is that any proposals within the Simister Bowlee allocation must be in accordance with a comprehensive masterplan that has been agreed by Bury and Rochdale local planning authorities and that it shall include a design code and an infrastructure phasing and delivery strategy.

16. The masterplan requirement is a critical stage in providing a bridge between the allocation of the site in PfE and any subsequent planning consent.

17. Supplementary planning documents (SPDs) build upon and provide more detailed advice or guidance on policies in an adopted development plan. They can be used to provide further guidance for development on specific sites, or on particular issues.

18. As they do not form part of the development plan, SPDs cannot introduce new planning policies into the development plan. However, they are a material consideration in the decision-making process when determining planning applications.

19. The SBDF has been prepared jointly by Bury and Rochdale Councils with technical input from the Northern Gateway Development Vehicle LLP (NGDV) as the main site promoter and input from other landowners / stakeholders.

SBDF Role and Objectives

20. Once adopted, the SBDF will establish the key principles for the development of the site and establish a policy/spatial framework against which future specific planning applications on the site will be considered. It will also help Bury and Rochdale Councils to ensure that the ambitions for the site are realised and the benefits to the communities of Bury and Rochdale are maximised.

21. The draft SBDF sets out:

- the proposed vision and strategic objectives for the site as shaped by public consultation, stakeholder collaboration and the Councils' ambitions;

- the high-level design and development parameters that all future planning applications within the site will follow;

- a comprehensive and co-ordinated masterplanning approach across the entire JPA1.2 site allocation;

1.1 an overarching Development Framework that sets out the key development parameters including matters such as land use, transport, access, movement and green infrastructure; and

- a high-level approach towards the delivery and phasing of on-site and off-site infrastructure improvements.

Scope and Content of the draft SBDF

21 Chapters 1 and 2 set out the background of the site, the role and purpose of the SBDF and the strategic planning context. These chapters include a brief description of the site as well as setting out the key local and national

planning policies which any development needs to take into account. The strategic planning context also sets out how this site aligns with other corporate strategies and the pivotal role of this site within the wider Atom Valley Mayoral Development Zone (MDZ) and emerging Mayoral Development Corporation (MDC).

22. Chapter 3 provides a detailed analysis of the site, setting out some of the key characteristics, opportunities and constraints. This section includes matters such as transport, ecology, landscape, heritage and social and community infrastructure. It identifies what is currently there as well as opportunities for dealing with any constraints and potential improvements that the development could deliver**.**

23. Chapter 4 set out the vision and objectives for the site. The over-arching aim is to create a thriving new neighbourhood where people, planet, and place come together. The people, planet and place theme continues as the theme for the more detailed objectives. Using these means that the overall objectives strongly align with Bury and Rochdale Council plans and the corporate priorities of the boroughs.

24. The issue of design is covered in chapter 5 of the draft SBDF. This section illustrates how the site constraints and opportunities, the site context, overarching vision and the policy framework have informed a set of design principles for the site. Particularly notable given the location and nature of the site is how the design responds to the surrounding countryside and the changing topography across the allocation. These principles will underpin the design and delivery of future planning applications that come forward on the site.

25. Chapter 6 brings together the key aspects of the preceding chapters to produce a masterplan framework for the site. In doing this it sets out how the masterplan proposals apply the vision, objectives and design principles to create the essential elements of a high quality and sustainable new place. Key elements of the masterplan include main vehicle and active travel access points and routes, areas of open space, the location of the local centre and community infrastructure, landscaping and housing density.

26. Chapter 7 sets out a number of development principles for the site. These will inform the parameters for the development of the Simister / Bowlee site and should be considered as part of any future planning applications within the site. The principles are wide ranging and include matters such as design, highways and access, public transport, active travel, the type of housing (including affordable housing), open space, education provision, green and blue infrastructure, flood risk and drainage.

27. Chapter 8 deals with phasing, infrastructure and delivery. This chapter sets out the key issues in terms of phasing and infrastructure and how they should

be considered in the delivery of the site. An Infrastructure, Phasing and Delivery Strategy will be produced alongside the SBDF. However, as this strategy is likely to be updated regularly to reflect new information and available funding, it is proposed that is not included within the SBDF but is instead a separate 'living' document produced through collaboration between Rochdale and Bury councils and key stakeholders. The Councils will work with all partners to bring forward the strategic infrastructure and this may include the Council (or other public sector bodies) potentially using its statutory land assembly powers to enable or facilitate the delivery of this major opportunity.

28. Chapter 9 addresses the importance of embedding an approach to sustainable development in delivering this site. This is necessary to meet Greater Manchester's ambition to become a carbon neutral city region by 2038, supported by the declaration of a climate emergency.

29. Chapters 10 and 11 set out the key benefits that are expected to be realised from the development. Chapter 10 deals with the general economic, social and environmental benefits, whilst Chapter 11 has a specific focus on social value.

30. Chapter 12 commits to a review of the SBDF should there be a change in circumstances which would have implications for the guidance provided in the document.

Consultation and Adoption

31. In preparing this draft SBDF, there has been early engagement with a range of stakeholders. This has been crucial in gaining valuable information about the long-term aspirations for the site and the infrastructure required to deliver the full potential of the site. Dialogue will continue through the consultation process to help shape any revisions to the SBDF before it is brought back to Cabinet for formal approval/adoption, once the consultation process has concluded.

32. As an SPD the SBDF 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 a Strategic Environmental Assessment or Habitat Regulation Assessment is required. The outcomes of the screening opinion will be published alongside the draft SBDF.
- Made available for public consultation for a 4-week minimum period (note that the consultation would be for six weeks).

- Made available for inspection, at a Council's principal office and at other places within its area as the Local Planning Authority consider appropriate, during normal business hours.
- Made available as an online copy.

33. The SBDF will be prepared in accordance with the statutory framework and the regulations cited above. For Bury, the Council's website will be used as the main point of contact for the formal consultation. The SBDF online consultation will be promoted via social media (Facebook and X) to raise awareness of the proposals and to issue reminders of the consultation closing date. These should direct residents to the formal consultation website.

34. Printed copies of the SBDF will also be placed in key public buildings (Town Hall and libraries) to allow members of the public to participate in the consultation process.

35. Publicity materials including posters will be located at key locations to signpost residents to the on-line information or to view proposals in person.

36. Direct contact via letters or email will be made with consultees registered on the Consultation Database (around 2,500 contacts).

37. Residents and businesses will also be able to view and discuss the proposals with Council officers at drop-in sessions being held on:

- Tuesday 24th February – Radcliffe Market – 4-8pm
- Wednesday 25th February – Elton High School – 4-8pm
- Thursday 26th February – Parrenthorn High School – 4-8pm
- Thursday 5th March – Edgar Wood Academy – 4-8pm (Simister Bowlee Development Framework only)

Next Steps

5.1 It is proposed that consultation on the draft SBDF will start on 13 February and run until 27 March 2026 (6 weeks in total).

5.2 This would allow for consideration of comments received and for any amendments to the SBDF to be made before the final version is taken back to Cabinet for formal approval/adoption of the SBDF in summer 2026.

Links with the Corporate Priorities:

Please summarise how this links to the Let's Do It Strategy.

38. 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 'Lets 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:

39. An EqIA analysis has identified potential impacts across some characteristics which will require consideration of mitigations as the development progresses. The EqIA will require update and revision as this development progresses

There are no outstanding equalities concerns at this stage

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*** *(contact c.m.wilkinson@bury.gov.uk for advice)*

40. Environmental impacts and concerns will be assessed and monitored as project delivery commences and will be in-line with existing Council policies. The Simister Bowlee Development Framework will seek to meet policy requirements, including physical, social and environmental impacts including biodiversity net gain.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
Stakeholders to not engage in the consultation on the draft Supplementary Planning Document.	The draft 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 the Council's 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:

To be completed by the Council's Monitoring Officer.

41. The draft SPD has been prepared in accordance with the Planning and Compulsory Purchase Act 2004 and the Town and Country Planning (Local Planning) (England) Regulations 2012.

34. The recommendations within the report to publish the draft SPD for consultation prior to consideration of responses and potential future adoption by the Cabinet is within the legal powers of the Council.

Financial Implications:

22. There are no financial implications arising directly from the drafting and adoption of the Simister Bowlee Development Framework. The Framework has been developed by Planning Services staff funded from existing approved budget allocations. Any costs relating to the consultation process will also be covered within existing approved budget allocations.

42.

Appendices:

Appendix 1 – Simister Bowlee Development Framework Consultation Draft Supplementary Planning Document

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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
SPD	Supplementary Planning Document
PfE	Places for Everyone Joint Development Plan
SBDF	Simister Bowlee Development Framework

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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	Draft Simister Bowlee Development Framework Supplementary Planning Document
Lead Officer (SRO or Assistant Director/Director)	Cris Logue
Department/Team	Business, Growth and Infrastructure
Proposed Implementation Date	24th October 2025
Author of the EqIA	Fran Smith
Date of the EqIA	16th October 2025

1.1 What is the main purpose of the proposed policy/project/decision and intended outcomes?

Draft Simister Bowlee Development Framework (SBDF)Supplementary Planning Document (SPD) supports Policy JPA1.2 of the Places for Everyone Joint Plan (PfE) which was adopted in March 2024.

The draft SBDF establishes the key principles for the development of the site and establishes a framework against which future planning applications on the site will be considered, sets out high level design principles and an approach to the delivery and phasing of infrastructure. In order to give the Framework additional planning weight in decision making, it is proposed that it is adopted as a Supplementary Planning Document (SPD).

The SBDF provides a clear vision for the delivery of the Simister Bowlee site. However, if circumstances change and have implications for the vision, design and development principles set out in the SBDF, then a review of this document will be appropriate.

It is proposed that the draft SPD is subject to at least a six-week period of consultation in order to establish stakeholder views on its content.

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 Simister Bowlee SPD will not affect any employees based on a protected characteristic(s) they have. Staff will be guided in their work, in line with national guidance and the council's strategic aims, enabling them to provide the public with the best possible level of service.

Community/Residents: **Yes** A key part of the PfE, including the Simister Bowlee site, 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 SBDF sets out how Simister Bowlee will contribute.

It is anticipated that it could take up to 15 years to deliver the Simister Bowlee site. The SBDF provides a high-level strategy and key principles for the delivery of Simister Bowlee, whilst retaining flexibility to allow for opportunities across the site. The potential impacts of delivering individual parcels of development within the site will be considered as detailed delivery information becomes more available.

Third parties such as suppliers, providers and voluntary organisations: **Yes** PfE and the Simister Bowlee SPD will provide careful and detailed advice towards ensuring high quality development within the Simister Bowlee allocation.

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:

PfE has been subject to an Integrated Assessment (which included an Equality Impact Assessment) and this can be viewed at mdc8-appendix-a-eqia-2023.pdf

Data:

Places for Everyone has already been through the Equality Impacts Assessment (EqIA) process at the relevant stages of development. The SPD expands on policies within Places for Everyone which has already been through the Sustainability Appraisal (SA) process at various stages of its development, where identified social, economic and environmental considerations have been established and assessed as part of the plan making process.

In addition to the SA, Places for Everyone is also supported by a robust and extensive evidence base, that has been tested through the examination process by independent Planning Inspectors.

Given the above, the most relevant information at this stage is the extensive range of evidence used in support of the development and examination of Places for Everyone, available to view at Places for Everyone Joint Development Plan and supporting evidence

Stakeholder information/consultation:

The SPD will be subject to at least a six-week public consultation prior to adoption. Full consideration will be given to all the responses received as part of the consultation exercise. Amendments to the draft SPD will be made where necessary. Outcomes from the public engagement will be set out within a Consultation Statement.

Ongoing dialogue has been carried out with internal officers and stakeholders throughout the preparation process for the draft SPD and no issues concerning equality and community cohesion have been raised as a result of these consultations. It is proposed that, following the public consultation, a further version of the Simister Bowlee SPD will be brought back to Cabinet for formal approval.

If a review of the SBDF is appropriate, the scope and content of the updated SPD would be subject to a proportionate statutory and/or public/stakeholder consultation prior to being finalised. This EqIA would be updated to reflect any amendments to the SBDF.

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	Different age groups have different housing and employment needs, which directly impact on how and when they choose to live.	The SPD includes proposals that will bring positive housing benefits to the young and old. As of 31 March 2024, there were 2,211 households on the housing register seeking affordable housing in the Borough and PfE requires development in the Simister Bowlee allocation to include affordable housing provision within which will help	The SPD is intended to apply to all age groups. It supports the provision for a range of housing including extra care and supportive living. Social uses such as retail, health, education facilities and public transport hubs are to be co-located to ensure	Neutral

		younger, first-time buyers get onto the property ladder. In addition, recent population projections indicate that there is likely to be a significant increase in the number of people aged over-65. The Housing Need and Demand Assessment (2020) estimates that there will be a need for an additional 578 units of specialist older person (planning use class C3) and 518 units of residential care (use class C2) from 2020-2037. There is expected to be an increase of around 403 dwellings needing major adaptation by 2030 to meet the needs of people illness or disability. This population changes are likely to present some challenges in terms of ensuring specific housing and care requirements of these groups can be met, and sufficient accommodation will have to be delivered to meet these needs. The SPD includes provision of a retirement village for older people, maximising their ability to live independent lives and retain control over their accommodation and services.	that all ages groups can access.	

		Public consultation methods will be designed to ensure all ages groups are engaged for example the use of leaflets, social media and drop in events.		
Disability	Different disability groups have different housing and employment needs, which directly impact on how and when they choose to live.	The SPD includes proposals that will bring positive housing benefits to all disabled groups The Housing Need and Demand Assessment (2020) estimates that there will be a need for an additional 578 units of specialist older person (planning use class C3) and 518 units of residential care (use class C2) from 2020-2037. There is expected to be an increase of around 403 dwellings needing major adaptation by 2030 to meet the needs of people illness or disability. This population changes are likely to present some challenges in terms of ensuring specific housing and care requirements of these groups can be met, and sufficient accommodation will have to be delivered to meet these needs. The SPD includes provision of extra care accommodation, maximising residents ability to live independent lives and retain control over their accommodation and services.	The SPD is intended to apply to all disability groups. It supports the provision for a range of housing including extra care and supportive living. Social uses such as retail, health, education facilities and public transport hubs are to be co-located to ensure that all disabled groups can access.	Neutral

		Additional requirements and guidance on design within the Simister Bowlee allocation should ensure improved access for less mobile people. Public consultation methods will be designed to ensure that key stakeholders, community groups and residents are engaged to ensure an inclusive approach.		
Gender Reassignment		There is no evidence that there will be a differential impact based on gender reassignment.		Neutral
Marriage and Civil Partnership		There is no evidence that there will be a differential impact based on marital or civil partnership status.		Neutral
Pregnancy and Maternity		There is no evidence that there will be a differential impact based on pregnancy and maternity.		Neutral
Race		There is no evidence that there will be a differential impact based on Race.		Neutral
Religion and Belief		There is no evidence that there will be a differential impact based on Religion on Belief.		Neutral
Sex		There is no evidence that there will be a differential impact based on the sex of a person.		Neutral
Sexual Orientation		There is no evidence that there will be a differential impact based on the sex orientation of a person.		Neutral

Carers		There is no evidence that there will be a differential impact for carers.		Neutral
Looked After Children and Care Leavers	Looked after children and care leavers may not be able to access open market housing	As of 31 March 2024, there were 2,211 households on the housing register seeking affordable housing in the Borough and the Plan includes a policy	PfE includes a policy requiring affordable housing provision within new residential development which will help younger, first-time buyers and socio-economically vulnerable residents get onto the property ladder. Development in the Simister Bowlee allocation will include affordable housing in line with PfE.	Neutral
Socio-economically vulnerable	Socio-economically vulnerable residents may not be able to access open market housing.	As of 31 March 2024, there were 2,211 households on the housing register seeking affordable housing in the Borough and the Plan includes a policy	PfE includes a policy requiring affordable housing provision within new residential development which will help younger, first-time buyers and socio-economically vulnerable residents get onto the property ladder. Development in the Simister Bowlee allocation will include affordable housing in line with PfE.	

Veterans		There is no evidence that there will be a differential impact on Veterans.		Neutral

Actions required to mitigate/reduce/eliminate negative impacts or to complete the analysis

2.5 Characteristics	Action	Action Owner	Completion Date
	EqIA to be updated following consultation to reflect the results of the consultation	Fran Smith	

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	0	0
3.3 Reasons for risk level calculation	Equalities impacts identified are all positive or will not affect other groups of people with protected characteristics. The type of development outlined in the document will benefit groups with protected characteristics including age and disability. Other groups with protected characteristics will not be negatively impacted by the SPD.	The impacts neutral impa

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	X	The SBDF seems to ensure that Simister Bowlee provides new homes and infrastructure for all future residents and employees and reduce the risks of negative impacts on local communities.
There are low impacts or risks identified which can be mitigated or managed to reduce the risks and activity will proceed		
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	Fran Smith	16/10/2025	
Responsible Asst. Director/Director	Cris Logue	16/10/2025	
EDI	L. Cawley	11/12/2025	QA Complete: The analysis has identified potential impacts across some characteristics which will require consideration of mitigations as the development progresses. The EqIA will require update and revision as this development progresses

EqIA Revision Log

5.2 Revision Date	Revision By	Revision Details
		This EqIA will be continually reviewed and updated as the SBDF develops. Further information will be considered when detailed deliver information becomes available.

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SIMISTER BOWLEE DEVELOPMENT FRAMEWORK

JPA 1.2

Supplementary Planning Document

February 2026



Bury Council

ROCHDALE BOROUGH COUNCIL

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Foreword

The recently adopted Places for Everyone Joint Development Plan allocates the Simister Bowlee site for up to 1,550 new homes.

To support the new community, the development will be required to provide specific infrastructure. This includes an upgraded local highway network, improved public transport, green spaces, a new primary school, community facilities and more routes for walking and cycling. Traffic restrictions will also be required on Simister Lane, to prevent this route from being a form of access/egress to and from the site.

The Simister Bowlee site lies between the towns of Prestwich and Middleton, spanning the districts of Bury and Rochdale. Strategically positioned at the junction of the M60, M62, and M66 motorways, it forms a major residential development area within the wider Northern Gateway. The site plays a critical role in delivering a well-planned neighbourhood that complements the largest combined employment and housing growth initiative in the North of England. The development will provide approximately 1,350 new homes in Bury and around 200 new homes in Rochdale.

Bury and Rochdale Councils are pleased to present the Simister Bowlee Development Framework which presents a clear long-term vision for the site, identifies guiding development principles and outlines the infrastructure needed to support the site's long-term development. This framework will guide consideration of future planning applications.

"The Simister Bowlee Development Framework sets out a clear vision for creating a well-planned, sustainable community of up to 1,550 new homes – 1,350 in Bury and 200 in Rochdale. With essential infrastructure, a new primary school, green spaces, and improved transport links, this development will play a vital role in shaping the Northern Gateway and delivering lasting benefits for Bury, Rochdale, and the wider region."

"This new framework represents another important step forward for this area as part of the wider Atom Valley project, which will create thousands of highly skilled jobs and new homes in Rochdale and Bury."



Figure 01: Councillor Eamonn O'Brien,Leader of Bury Council and Cabinet Member for Strategic Growth



Figure 02: Councillor Neil Emmott, Leader of Rochdale Borough Council



01

Introduction

1. Introduction

This draft Simister Bowlee (Northern Gateway) Development Framework ("SBDF") Supplementary Planning Document ("SPD") has been prepared by Bury and Rochdale Councils. It relates to the Simister and Bowlee (Northern Gateway) site that is allocated for residential-led development under Policy JP Allocation 1.2 ("JPA1.2") of the Places for Everyone Joint Development Plan ("PfE"). The site forms part of the wider 'Northern Gateway' development location which incorporates the nationally significant employment development opportunity to the north of the M62. This site is allocated under PfE Policy Allocation 1.1: Heywood / Pilsworth (Northern Gateway) ("JPA1.1"), and subject to a separate Development Framework SPD that was adopted in March 2025.

The JPA1.1 and JPA1.2 employment and residential led allocations that comprise Northern Gateway sit within the Atom Valley Mayoral Development Zone ("MDZ"), which straddles Bury, Oldham and Rochdale, and forms part of the wider North-East Growth Corridor. Taken together, JPA1.1 and JPA1.2 present a significant opportunity to deliver 20,000 new jobs across up to 1.2 million square metres of employment space and more than 2,500 new homes.

This draft SBDF SPD relates solely to the JPA1.2 site that is allocated in PfE (herein referred to as 'the site'); however, it recognises the intrinsic links with the significant employment-led opportunity at JPA1.1, and seeks to provide the type and quality of homes to underpin the wider Northern Gateway and Atom Valley opportunity.

Northern Gateway presents a significant opportunity for Greater Manchester to deliver a new, sustainable residential community to support Greater Manchester's Northern communities and to reinforce the intrinsic links between homes and jobs alongside the ambitious Atom Valley Mayoral Development Zone (MDZ).

1.1 JPA1.2: Simister Bowlee

The Simister Bowlee site is allocated for development under PfE Policy JPA1.2. Policy JPA 1.2 identifies the site as a residential-led development opportunity that is allocated to deliver up to 1,550 new homes, supported by community and other essential infrastructure.

To provide a blueprint for the future delivery of the full JPA1.2 allocation and to establish the parameters within which future planning applications will be brought forward, Policy JPA1.2 states that development at the site should:

> *"1. Be in accordance with a comprehensive masterplan, design code and infrastructure phasing and delivery strategy, in line with Policy JP-D1 'Infrastructure Implementation' that has been agreed with the local planning authorities."*

This requirement is common across major strategic allocations in PfE and assists in bridging the gap between site allocations and the development of detailed planning applications. This draft SBDF seeks to address this policy requirement by providing an indicative masterplan for the site, accompanied by a series of design and development principles to guide the future development of JPA1.2.

An Infrastructure Phasing and Delivery Strategy ("IPDS") for the site is being prepared in accordance with PfE Policies JPA1.2 and JP-D1 (Infrastructure Implementation) and should be read alongside this SPD. The IPDS will remain a 'live document' and will be subject to regular updates and amendments outside of the SPD process, in order to be responsive to constraints and opportunities, and the availability of funding, as the site is brought forward.

Purpose of the JPA1.2 Simister Bowlee Development Framework

This framework has been prepared as a Supplementary Planning Document ("SPD") by Bury and Rochdale Council (herein collectively referred to as "the Councils") and will carry planning weight as a material consideration in the determination of future planning applications on the site.

As an SPD, this document does not introduce new planning policies into the Development Plan. It provides detailed guidance on the policies in PfE to ensure that the vision for the allocation is fulfilled throughout the lifetime of the development process, and that development and infrastructure come forward in a planned and comprehensive manner.

The Framework includes a masterplan which is intended to be indicative only and retain flexibility to respond to design, site constraints and future market conditions.

This draft SBDF has been prepared in a collaborative manner, with engagement undertaken with landowners, key stakeholders and statutory and non-statutory consultees. The Councils welcome feedback on the draft SBDF during this period of consultation and will set out how the feedback received has been included into a final draft of the document – which will be considered by each Council Cabinet prior to its formal adoption.

The remainder of this chapter sets out the site context, purpose and status of the SPD.

SPDF Role and Objectives

The role of this SBDF is to establish the key principles to guide the development of the site and to inform future planning applications. The objectives of this SPDF are to:

- Establish the vision and strategic objectives for the site, shaped by public consultation, stakeholder collaboration and the Councils' ambitions;
- Set out the high-level design and development parameters that all future planning applications within the site will be required to follow;
- Implement a comprehensive and co-ordinated phased masterplanning approach across the entire JPA1.2 site allocation;
- Provide an overarching framework that sets the key development principles and parameters including matters such as land use, transport, access, movement and green infrastructure; and
- Set out a high level approach to the delivery and phasing of on-site and off-site infrastructure improvements.

SPDF Structure

This document is set out as follows:

- **Chapter 2 – Strategic Policy Context:** this sets out the planning and strategic policy context that has informed the development of the SBDF and which will continue to inform the future planning applications on the site.
- **Chapter 3 – Understanding the Site**: this sets out the site context and surroundings, and the key constraints and opportunities that have influenced concept development.
- **Chapter 4 – Vision & Strategic Objectives:** this presents the vision and the key strategic objectives for the site.
- **Chapter 5 – Design Approach:** this presents the strategic design principles that respond to the strategic context, vision and objectives for the site.
- **Chapter 6 – The Masterplan Framework:** this sets out an indicative site-wide masterplan for the site.
- **Chapter 7 – Development Principles:** this presents the development principles that respond to the strategic context, vision and objectives for the site.
- **Chapter 8 – Phasing & Delivery:** this sets out the approach to phasing, delivery and infrastructure that will inform a separate and more detailed IPDS.
- **Chapter 9 - Sustainability Strategy:** this sets out the expectations from the site with respect to net zero, carbon, energy, resource efficiency and climate resilience.
- **Chapter 10 – The Benefits:** this provides a detailed review of the economic, social, and environmental benefits that the SBDF will deliver for the local communities, the districts of Bury and Rochdale and the wider Greater Manchester City Region.
- **Chapter 11 - Social Value Strategy:** this sets out how Social Value should be embedded into the delivery of Simister Bowlee.
- **Chapter 12 – Monitoring and Review:** this provides a summary of the process for future review of the SBDF.



Figure 03: An aerial view of site allocation JPA1.2 Simister Bowlee. Please note that the boundary shown on this image is indicative - see Figure 05 for an accurate boundary plan



02

Strategic Policy Context

2. Strategic Policy Context

This chapter sets out the planning and strategic policy context that has informed the development of the SBDF, and which will continue to inform planning applications that relate to the site.

2.1 The National Policy Landscape

National policy has seen a renewed focus on addressing the UK housing crisis and delivering the homes needed to support future generations, by seeking to deliver 1.5 million new homes across the next Parliament. An updated National Planning Policy Framework ("NPPF") was implemented in December 2024, which has sought to boost housebuilding and housing delivery, by supporting plan making and removing barriers to the delivery of suitable housing sites.

The revised NPPF has strengthened the approach towards maintaining a robust housing supply across deliverable sites which has placed an increased focus on allocated strategic sites, such as Simister Bowlee.

Sustainable Development

In its approach to delivering new development, the NPPF confirms that in order to achieve sustainable development, the planning system has three overarching and interdependent objectives, including:

An economic objective:
to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure

A social objective:
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

An environmental objective:
to protect and enhance our natural, built and historic environment; including making effective use of land, improving biodiversity, using natural resources prudently, minimising waste and pollution, and mitigating and adapting to climate change, including moving to a low carbon economy

Masterplans and Placemaking

Paragraph 130 of the NPPF states that: *"Area-based character assessments, design guides and codes and masterplans can be used to help ensure that land is used efficiently while also creating beautiful and sustainable places..."*.

The NPPF is supported by Planning Practice Guidance (PPG) which states that:

> *"Masterplans set the vision and implementation strategy for a development. They are distinct from local design guides by focusing on site specific proposals such as the scale and layout of development, mix of uses, transport and green infrastructure. Depending on the level of detail, the masterplan may indicate the intended arrangement of buildings, streets and the public realm...' and that 'A range of other plans and technical reports may be needed alongside a masterplan, to provide supporting evidence and set out related proposals, such as a local character study, landscape assessment, transport assessment and proposals for securing biodiversity net gain.*
>
> *An implementation strategy could also be included, especially where development is expected to be brought forward in a number of phases". (Paragraph: 006 Reference ID: 26-006-20191001).*

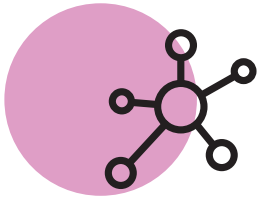
In describing how masterplans can be used most effectively, PPG states that:

> *"Masterplans are most likely to be produced by local authorities or developers. For local authorities, they can help to clarify design expectations early in the planning process, set a clear vision for the site, inform infrastructure and viability assessments and identify requirements for developer contributions or other investment. Developers may produce a masterplan to help evolve their own vision for a site, assess options, engage the local planning authority and community in pre-application discussions and support an outline planning application.*
>
> *Whoever prepares them, masterplans can benefit from a collaborative approach between the local planning authority, site promoters and local communities so that aspirations and constraints are understood early on. Masterplans produced by local planning authorities may be adopted as supplementary planning documents to give them weight in decisions on applications. Masterplans often apply to schemes that are developed over a long time period and so may need to be subject to regular review and be flexible to adapt to changing circumstances." (Paragraph: 007 Reference ID:26-007-20191001)*

The SBDF has been prepared in full accordance with NPPF (and the National Planning Practice Guidance which supports it) and seeks to significantly boost the supply of new homes in the northern arc of Greater Manchester that will deliver considerable social, economic and environmental benefits.

2.2 Places for Everyone ("PfE") Joint Development Plan

PfE is the statutory planning document that guides development in the nine Greater Manchester authorities which have formally adopted it, providing the key policy framework that underpins the preparation of the SBDF. In summary, PfE provides:



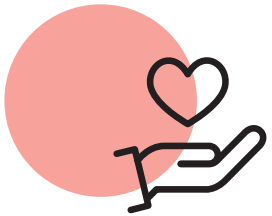
The strategic plan that informs the preparation of individual Local Plans by the nine participating Greater Manchester authorities



The detailed policies to inform the preparation and determination of planning applications



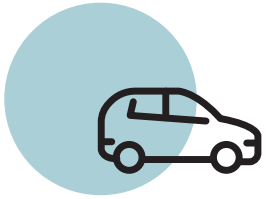
The planning framework for the spatial development of the nine participating Greater Manchester authorities to 2039



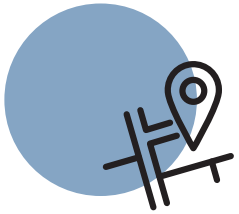
A policy framework that identifies the important assets which will be protected and enhanced



The quantum of housing and employment required in each participating local authority and across the Plan area over the lifetime of PfE



Policies to support the delivery of key infrastructure, such as transport and utilities; and



The allocation of key strategic sites that will contribute to meeting the identified housing and employment need



A new Green Belt boundary for the nine participating authorities

A key element of PfE's Spatial Strategy is boosting the competitiveness of the northern districts, which have seen relatively low levels of growth overall compared to other parts of the City Region. The northern districts are identified as having many strengths, such as their distinctive landscapes, proud communities, and a strong manufacturing base, but their potential is not currently being realised. It is recognised that significant interventions and investment will be required to address areas of deprivation and relatively low levels of growth.

PfE identifies two broad growth locations as being especially important for having the potential to deliver significant benefits for the whole conurbation and to make a major contribution to raising the competitiveness of the northern areas as a whole. One of these locations is the North-East Growth Corridor, which includes the M62 corridor from Junction 18 (the confluence of the M60 and M66) to Junction 21 (Milnrow), extending across parts of Bury, Rochdale and Oldham. Three sites have been allocated as part of the North-East Growth Corridor, two of which make up the Northern Gateway (JPA 1.1 and JPA 1.2).

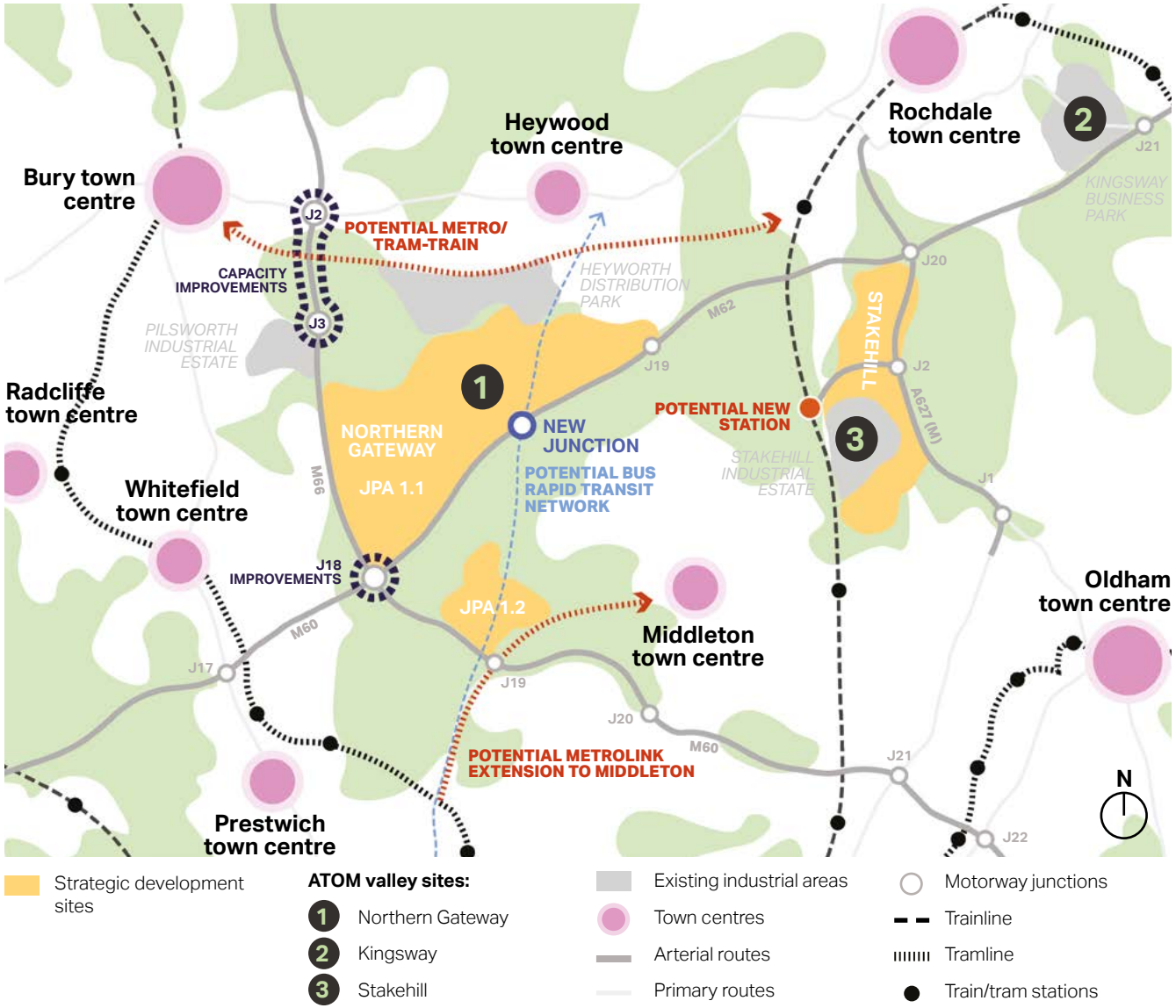


Figure 04: Regional context plan showing the wider north-east growth corridor. Strategic sites and transport infrastructure projects are highlighted, including Northern Gateway site allocations JPA 1.1 and JPA 1.2. Diagram based on Figure 4.2 from PfE (Page 62).

Site Allocation JPA1.2

PfE Policy JPA1.2 Simister and Bowlee (Northern Gateway) is the strategic allocation for the site and sets out the policy requirements that underpin the development principles and masterplan framework contained in this framework. This states that development at this allocation will be required to:

1. *"Be in accordance with a comprehensive masterplan, design code and infrastructure phasing and delivery strategy, in line with Policy JP-D1 'Infrastructure Implementation', that has been agreed with the local planning authorities;*

2. *Deliver a broad mix of around 1,550 homes to diversify the type of accommodation across the Simister, Bowlee and Birch and Langley areas. This should include an appropriate mix of house types and sizes, accommodation for older people, plots for custom and self-build (subject to local demand having regard to the Councils' self-build registers and other relevant evidence) and a mix of housing densities with higher densities in areas of good accessibility and potential for improved public transport connectivity and lower densities adjacent to existing villages where development will require sensitive design to respond to its context;*



Figure 05: JPA1.2 Simister Bowlee allocation boundary

3. *Make provision for new and improved sustainable transport and highways infrastructure having regard to the indicative transport interventions set out in Appendix D in accordance with Policy JP-C8;*

4. *Make provision for traffic restrictions on Simister Lane to prevent this route from being a form of access/egress to and from the allocation except by public transport;*

5. *Make provision for affordable housing in accordance with local planning policy requirements;*

6. *Make provision for a new two-form entry primary school and make financial contributions for off-site additional secondary school provision to meet needs generated by the development, in accordance with Policy JP-P5;*

7. *Make provision for a new local centre in an accessible location which includes a range of appropriate retail, health and community facilities and ensure it is integrated with existing communities;*

8. *Ensure the design and layout allows for effective integration with surrounding communities, including active travel links and connections to local services and the new areas of employment at Heywood/Pilsworth (JPA 1.1);*

9. *Make provision for compensatory improvements to the environmental quality and accessibility of the remaining Green Belt in the vicinity of the site in accordance with Policy JP-G2;*

10. *Strengthen the boundary of the Green Belt to the North West of the site such that it will comprise physical features that are readily recognisable and likely to be permanent;*

11. *Make provision for biodiversity, including taking appropriate account of Bradley Hall Farm SBI, in accordance with Policy JP-G8;*

12. *Incorporate appropriate noise and air quality mitigation measures and high-quality landscaping along the M60 motorway corridors and local road network, if required, within the allocation;*

13. *Incorporate necessary remediation measures in areas affected by contamination and previously worked for landfill purposes;*

14. *Take appropriate account of relevant heritage assets, and their settings, including Heaton Park, in accordance with Policy JP-P2; and*

15. *Consider the extraction of any viable mineral resources within Mineral Safeguarding Areas, in accordance with Policy 8 of the Greater Manchester Joint Minerals Development Plan (or any relevant policies in subsequent minerals plans)."*

Other PfE Policies

PfE also includes a range of other policies relating to development management and technical/ environmental matters which have been taken into account in the preparation of this framework and are referenced where relevant in the design and development principles.

Local Plan Policies

Both Bury and Rochdale are in the process of producing their own Local Plans setting out more detailed policies including both strategic and non-strategic policies, as appropriate, reflecting local circumstances. These Local Plans will be prepared to be consistent with the overarching PfE.

There are a number of adopted Development Plan documents which, alongside PfE, currently form part of the statutory Development Plan. The relevant adopted Local Planning Policy documents for the site include:

- Saved Policies of the Bury Unitary Development Plan (adopted 1997);
- The Rochdale Core Strategy (adopted 2016);
- Saved Policies of the Rochdale Unitary Development Plan (adopted 2006);
- The Greater Manchester Joint Waste Development Plan (adopted 2012); and
- The Greater Manchester Joint Minerals Development Plan (adopted 2013).

These statutory policy documents have been fully considered in the preparation of this framework.



Figure 06: Bury and Rochdale Draft Local Plans

A key element of PfE's Spatial Strategy is boosting the competitiveness of the northern districts, which have seen relatively low levels of growth overall compared to other parts of the City Region.

Atom Valley Mayoral Development Zone ("MDZ")

The potential for the North-East Growth Corridor to deliver transformative change has led to the formal designation of the Atom Valley MDZ covering the two key areas for growth at the Northern Gateway (Policy JPA1.1 and Policy JPA1.2), along with Stakehill (Policy JPA2) and Kingsway Business Park. The designation of the Atom Valley MDZ provides a clear mechanism to align public and private sector investment to ensure that there is a commitment to the principle of delivering inclusive and sustainable growth across the three sites and adjoining towns.

PfE Policy JP-Strat7 (North-East Growth Corridor) incorporates the Atom Valley MDZ and seeks to deliver a nationally significant area of economic activity, supported by a significant increase in the residential offer, delivering truly inclusive growth over the lifetime of PfE.

Atom Valley Northern Gateway Mayoral Development Corporation ("MDC")

Following the establishment of the Atom Valley MDZ, GMCA has successfully sought approval from the Secretary of State to introduce an MDC to cover the Northern Gateway Region to support the realisation of a shared vision for the area and further develop the work of the MDZ. The MDC, which is a locally controlled cross-boundary corporate body between Bury and Rochdale, was established in January 2026, and covers both JPA 1.1 and JPA 1.2, as well as surrounding motorway infrastructure and associated travel routes.

MDCs are important tools for delivering large-scale development and bring a number of advantages to complex projects such as Northern Gateway, including:

- A focus on coordination and consistent delivery from a dedicated body with a specific purpose to develop and deliver a strategic vision for a defined area;
- Highly visible public sector commitment coupled with public and private sector expertise as a driver for private investment; and
- Powers to facilitate the delivery of the project.

2.3 Corporate and Economic Strategies

The SBDF has been prepared with full regard to regional and sub-regional corporate and economic strategies across the North West, Greater Manchester and Bury and Rochdale Councils, including:

- Greater Manchester Strategy 2025-2035
- Greater Manchester Local Industrial Strategy 2019
- Greater Manchester Housing Strategy 2019 – 2024
- Greater Manchester 5 Year Environment Plan 2025-2030
- Greater Manchester Digital Blueprint 2023-2026
- Greater Manchester CreateGM: Strategy for Culture, Heritage and Creativity 2024-2030
- Greater Manchester Transport Strategy 2040
- Greater Manchester Local Nature Recovery Strategy
- Northern Gateway Transport Framework
- Bury 2030 Strategy: 'LET'S Do It!'
- Bury Housing Strategy
- Bury's Economic Strategy 2024-2034
- Bury Local Transport Strategy
- Rochdale Growth Plan 2020-2030
- Rochdale's 'People, Place and Planet' Council Plan 2028
- Rochdale Borough Transport Strategy



Figure 07: A selection of relevant sub-regional corporate and economic strategies.



03

Understanding The Site

3. Understanding The Site

The preparation of this SBDF has been underpinned by detailed technical analysis that has considered specific site opportunities and constraints.

3.1 Site Context

3.1.1 Site History

Early records (c1847) show that the site and surrounds was historically characterised by a series of farmsteads which, as part of a farm complex, provided functional and ancillary buildings arranged around a farmyard which provided a group character. The agricultural land surrounding these farms emphasised their historic and traditional functions and connections to the surrounding landscape.

Later alterations and developments dating to the 20th century have altered the appreciation of the historic form and arrangement of the buildings, and their connections to the wider landscape. The Simister, Bowlee and Rhodes Green settlements were developed during 19th and 20th Century as the character of the wider surroundings became more urban, developing the pattern of development that exists today .

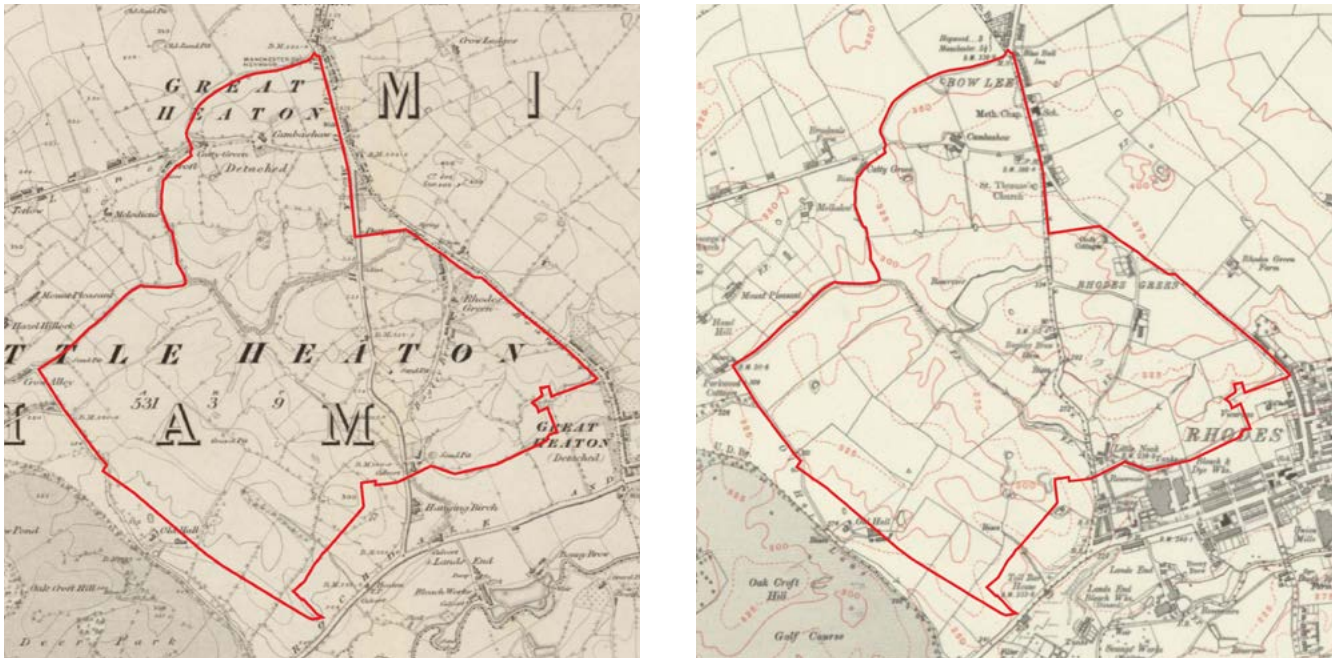


Figure 08: Historic maps of the Simister Bowlee site from circa 1850 and 1915, with site boundary added. Reproduced with the permission of the National Library of Scotland, licensed under CC BY 4.0. Source: https://maps.nls.uk/

3.1.2 The Site Today

The Simister Bowlee site is strategically located in the north of the Greater Manchester conurbation, and is centrally positioned to support major growth locations in the Atom Valley MDZ, including the world class employment destination at JPA1.1.

Site allocation JPA1.2 comprises approximately 98 hectares and encompasses land to the east and west of Heywood Old Road (the A6045). The site currently comprises predominantly agricultural grazing land divided into fields by boundaries of hedgerows, fencing and trees. There are a number of dispersed farmsteads and residential properties within the site boundary and existing properties fronting on to Heywood Old Road on either side. The topography is undulating with surface water features including an unnamed watercourse running north to south across the site and a fishing pond in the central part of the site. There are several Public Rights of Way ("PRoW") also running in a broadly north/south direction across the site.



Figure 09: Agricultural land to the west of Heywood Old Road



Figure 10: Agricultural land to the east of Heywood Old Road

3.1.3 Surrounding Site Context

The northern boundary of the site consists of agricultural land to the east of Simister Village which is defined by field boundaries and hedgerows. The western boundary is defined by the M60 and the southern boundary by the suburb of Rhodes. To the north east of the allocation are further agricultural fields, North Manchester Golf Club and, further east, the built-up areas of Langley and Middleton.

The site is well related to the existing urban area. The settlements of Simister, Middleton, Rhodes, Blackley and Prestwich are all within a 2km distance of the centre of the site. Heaton Park lies to the south west, on the western side of the M60.

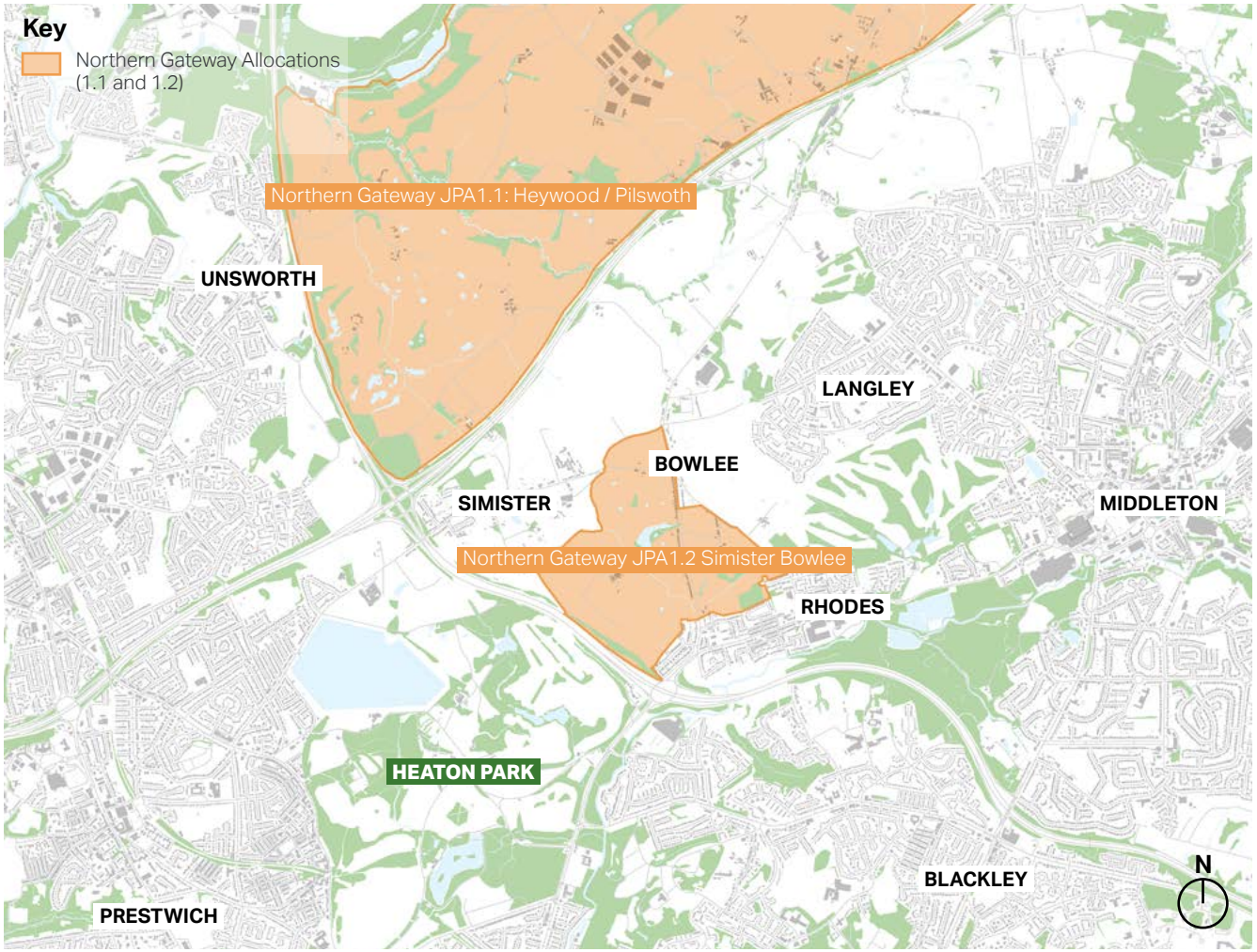


Figure 11: Plan showing Northern Gateway allocations JPA 1.1 and JPA 1.2.

3.2 Site Characteristics and Opportunities

3.2.1 Transport and Highways

Characteristics

The site is strategically located close to established residential populations in Bury, Rochdale and the town centres of Prestwich and Middleton. These areas have a large number of amenities including retail, leisure, education and healthcare. Primary access to the site is via Heywood Old Road (A6045). Existing transport links connect the site to the surrounding centres, however opportunities exist to enhance the accessibility and sustainability of the site.

Opportunities

The GM Transport Strategy 2040 recognises the key role that development at the Northern Gateway will play in generating the opportunity and demand for new public transport services. The Strategy identifies a number of key strategic initiatives that could be expected to influence journey choice to and from the JPA 1.1 and JPA 1.2 sites, including:

- Bus connections to key local centres including Bury, Heywood, Rochdale, Middleton, Manchester
- Opportunities to utilise Bowker Vale tram stop by cycle
- Long term aspirations for additional bus connections to Radcliffe, Whitefield and Prestwich
- High quality bus infrastructure
- The long term potential for a future tram-train service between Bury-Heywood-Rochdale and Oldham, including a tram-train extension into Northern Gateway
- A new Metrolink extension to Middleton
- Bus Rapid Transit between Heywood and Manchester city centre (via Northern Gateway)

The Councils are currently working directly with Transport for Greater Manchester ("TfGM") on transport initiatives as part of a comprehensive package of measures which will be further considered and programmed to support development in the Northern Boroughs.

In terms of the site itself, access opportunities have been identified to deliver primary and secondary access solutions from the A6045. Details of the bus provision on site, and/or along the A6045 are to be explored with TfGM.

Key

- Northern Gateway Allocations (1.1 and 1.2)
- Motorway
- Motorway bridge
- Motorway underpass
- Pedestrian crossing point
- Vehicular crossing point
- Primary roads
- TfGM bus network
- Railway and tramway
- Public Right of Way
- Local bus stops
- Train stations
- Tram stations
- Potential road network (Site 1.1)

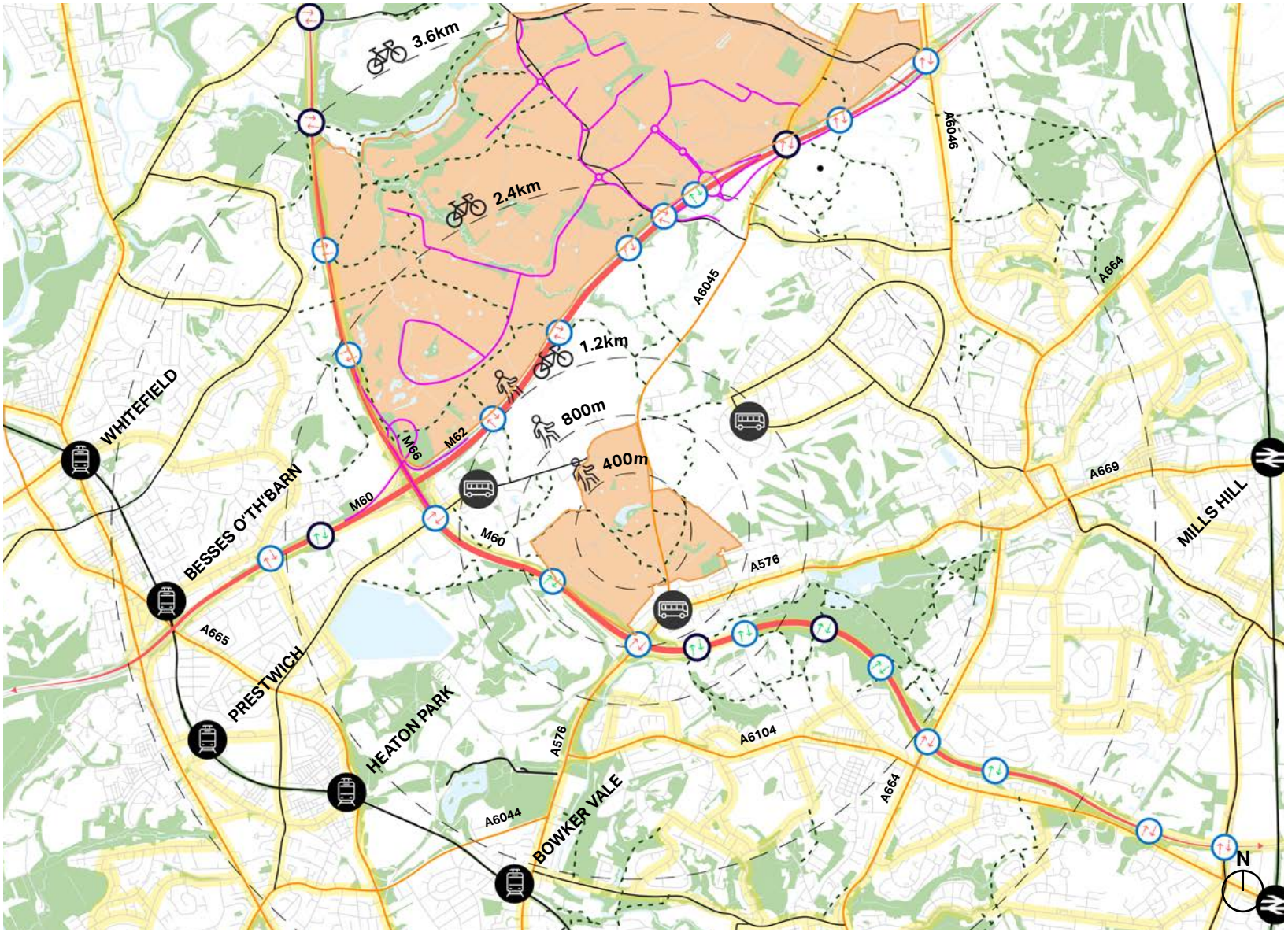


Figure 12: Plan showing the existing strategic movement and transport network surrounding the Northern Gateway allocations

3.2.2 Public Rights of Way, Footpaths and Cycle Paths

Characteristics

There is an existing network of footpaths and cycle lanes (including on Heywood Old Road) that connect the site to surrounding communities, services and amenities, including Simister Village, facilities on Manchester Old Road and Middleton. A network of Public Rights of Way ("PRoW") also traverse the site and its surrounds and link to wider destinations, including Heaton Park.

Opportunities

There is an opportunity to improve pedestrian and cycle infrastructure, that links into existing PRoWs, and provides safe pedestrian and cycle links to the local facilities and amenities. An opportunity exists to enhance east-west and north-south connections and to provide green links that integrate with the existing movement network, including PRoW's. There is also an opportunity to connect the existing residential areas at Simister Village, Heywood Old Road and Manchester Old Road through a network of green routes, and by encouraging sustainable mode of travel to reduce the reliance on the car for short trips.



Figure 13: The entrance to an existing public footpath from Heywood Old Road

3.2.3 Ecology

Characteristics

The site is characterised by largely low-quality modified grassland associated with cattle grazing and silage with some areas of other neutral grassland. There are hedgerows across the site, with ponds and a large fishing lake evident on land to the west of Heywood Old Road. A stream runs north to south through the central area of the western part of the site, featuring a riparian corridor in moderate condition. Additionally, a woodland block is adjacent to the M60. A Site of Biological Importance ("SBI") at Bradley Hall Farm, is located on the eastern part of the site.

At the time of writing, initial survey results demonstrate that the riparian corridor and linear features are the most important features for bats and that there is a limited number of skylark territories recorded. No bat roosts or water vole signs have been recorded to date and the eDNA surveys for Great Crested Newts returned negative results.

Opportunities

There is an opportunity to bring forward a development that seeks to protect sensitive habitats, enhance biodiversity and create multi-functional green corridors and spaces. In terms of Biodiversity Net Gain ("BNG"), the site offers opportunities to contribute towards 10% gain by retaining and enhancing important ecological features, and creation of new more diverse habitats offering increased opportunities for species.



Figure 14: The site is characterised by largely low-quality modified grassland associated with cattle grazing and silage with some areas of other neutral grassland.



Figure 15: There are hedgerows across the site, with ponds and a large fishing lake evident on land to the west of Heywood Old Road.

3.2.4 Heritage and Archaeology

Characteristics

Heaton Park (a Grade II Registered Park and Garden) is situated approximately 100m to the south west of the site, beyond the M60 motorway which provides a physical and visual barrier. The park has a wide setting that includes both rural and urban areas. The areas of the Registered Park and Garden nearest to the site include a golf course, whereas the Grade I Listed Heaton Hall is at a greater distance to the west. A temple to the north east of Heaton Hall (Grade II* Listed building) is situated at a high point within the park, though tree belts largely preclude views northwards towards the northern parts of the site.

There are additional listed buildings within the wider surroundings of the site including the Church of St. George (Grade II Listed building) which is approximately 300m to the north of the site. Little Nook is an altered farmstead and a locally listed building within the site that would be retained as part of any future proposals. The asset is located within a suburban setting to the north and south with land to the east and west rising steeply, providing enclosure.

There are no designated archaeological assets within the site or its surroundings.

Opportunities

There is an opportunity to ensure that the site's intervisibility with the Heaton Park Grade II Listed Registered Park and Garden is considered to inform the future design of site, and ensure key view points into and out of the site are retained.



Figure 16: The Church of St. George (Grade II Listed Building) is located approximately 300m to the north of the site.

Key

- Northern Gateway Allocations (1.1 and 1.2)
- Conservation Areas
- Grade I Listed assets
- Grade II* Listed assets
- Grade II Listed assets
- Grade II Park and Garden

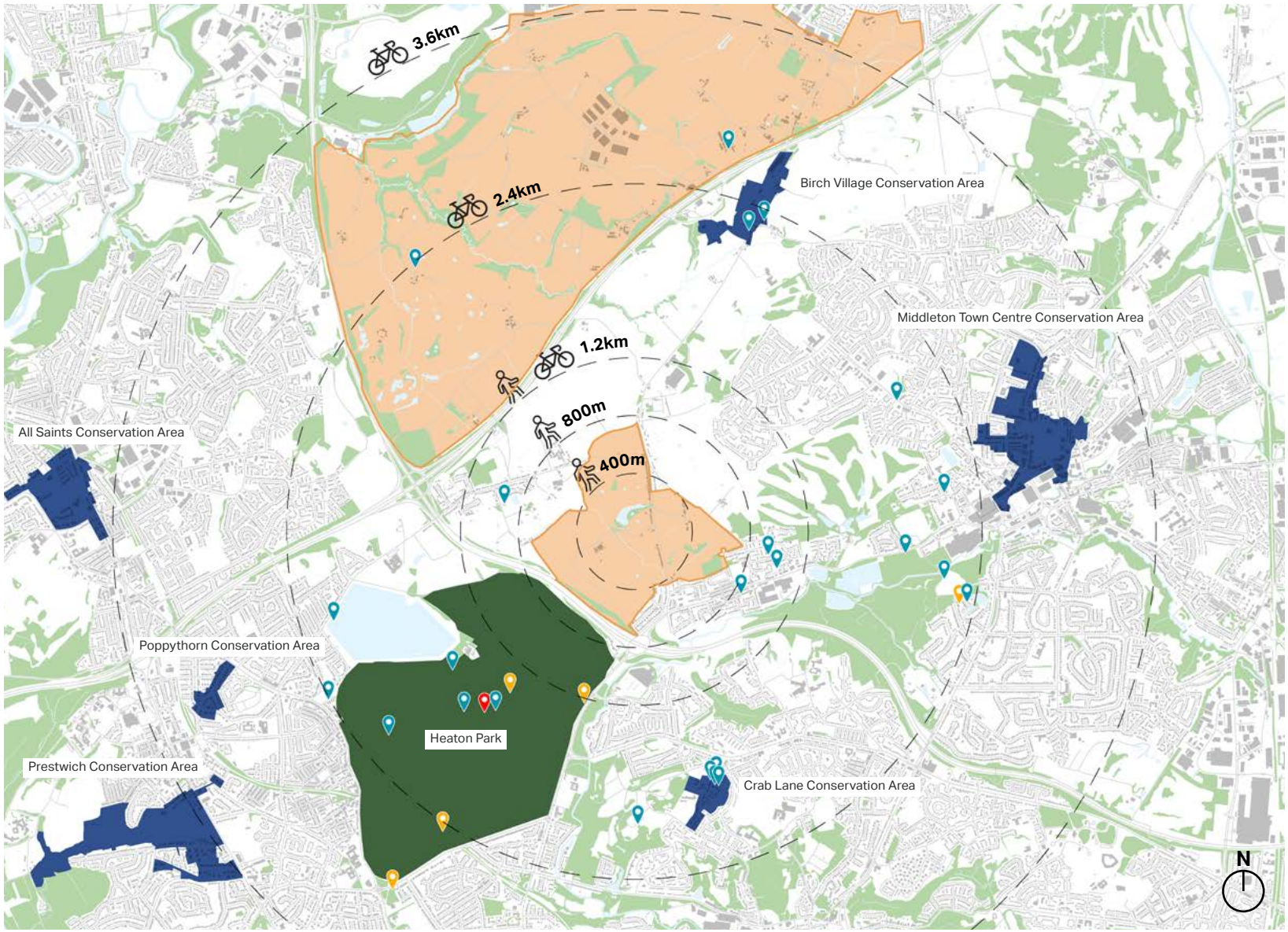


Figure 17: Plan showing heritage designations surrounding the Northern Gateway allocations

3.2.5 Landscape and Greenspace

Characteristics

There are no National Parks or National Landscapes (previously known as Areas of Outstanding Natural Beauty) located within or close proximity of the site. The site is located within National Character Area (NCA) 54 Manchester Pennine Fringe, with NCA 55 Manchester Conurbation located to the south.

The Greater Manchester Landscape Character and Sensitivity Report (2018), produced by LUC, provided localised landscape evidence to support the preparation of PfE. The document identifies the site as being located within Landscape Character Type ('LCT') 'Urban Fringe Farmland' and Landscape Character Area ('LCA') 27: Simister, Slattocks and Healds Green. It assesses LCA 27 to have 'moderate' sensitivity to both residential and commercial development noting that the LCA *"contains existing large industrial development (Birch Business Park and Stakehill Industrial & Distribution Park) and is crossed by large road infrastructure such as the M62 and A627 (M) which have strong influence detracting from the rural qualities of the landscape".*

The site is formed by two parcels to the east and west of Heywood Old Road; a road which is presently characterised by ribbon residential development. The M60 corridor exerts an urbanising influence on the south western edge of the western parcel as well as the M62 to the north west.

Intervisibility exists within elevated parts of the site towards the Manchester conurbation, distant hills (South Pennines) and Scout Moor Wind Farm. In these views, the urbanised context of the surrounding landscape is apparent. The local Public Rights of Way (PRoW) network traverses the site, and the Rochdale Way passes along Boardman Lane to the north of the eastern parcel. In addition, the site has some limited intervisibility with Heaton Park Grade II Listed Registered Park and Garden (part of which comprises Heaton Park Golf Club) which contributes to the heritage and recreational quality of the site context and has been considered in the development of a Masterplan for the site.

In terms of surrounding green spaces, Bowlee Community Park is also a significant area of around 40 ha and includes cycle paths, sports pitches, changing facilities and is used for sport and community events.

There are several mature trees present throughout the site, comprising mainly hedgerow trees within fragmented and outgrown hedgerows bordering the agricultural fields. The wooded brook valley passing east-west through the site, the centrally located reservoir with associated woodland blocks, and wooded corridor associated with the M60 corridor are also characteristic features.

Opportunities

There is an opportunity to deliver a masterplan that draws on the character and landscape strengths of the site, and creates new landscape features. This includes opportunities to create a green infrastructure corridor along the existing brook, providing new green infrastructure that connects with the broader green infrastructure network and providing landscape buffers and boundary treatment to soften the development edges, whilst providing opportunities for the public to better interface with open spaces.

Key

- Northern Gateway Allocations (1.1 and 1.2)
- Green Belt
- Water
- Parks and green spaces
- Golf courses
- Play areas
- Allotments
- Sports pitches

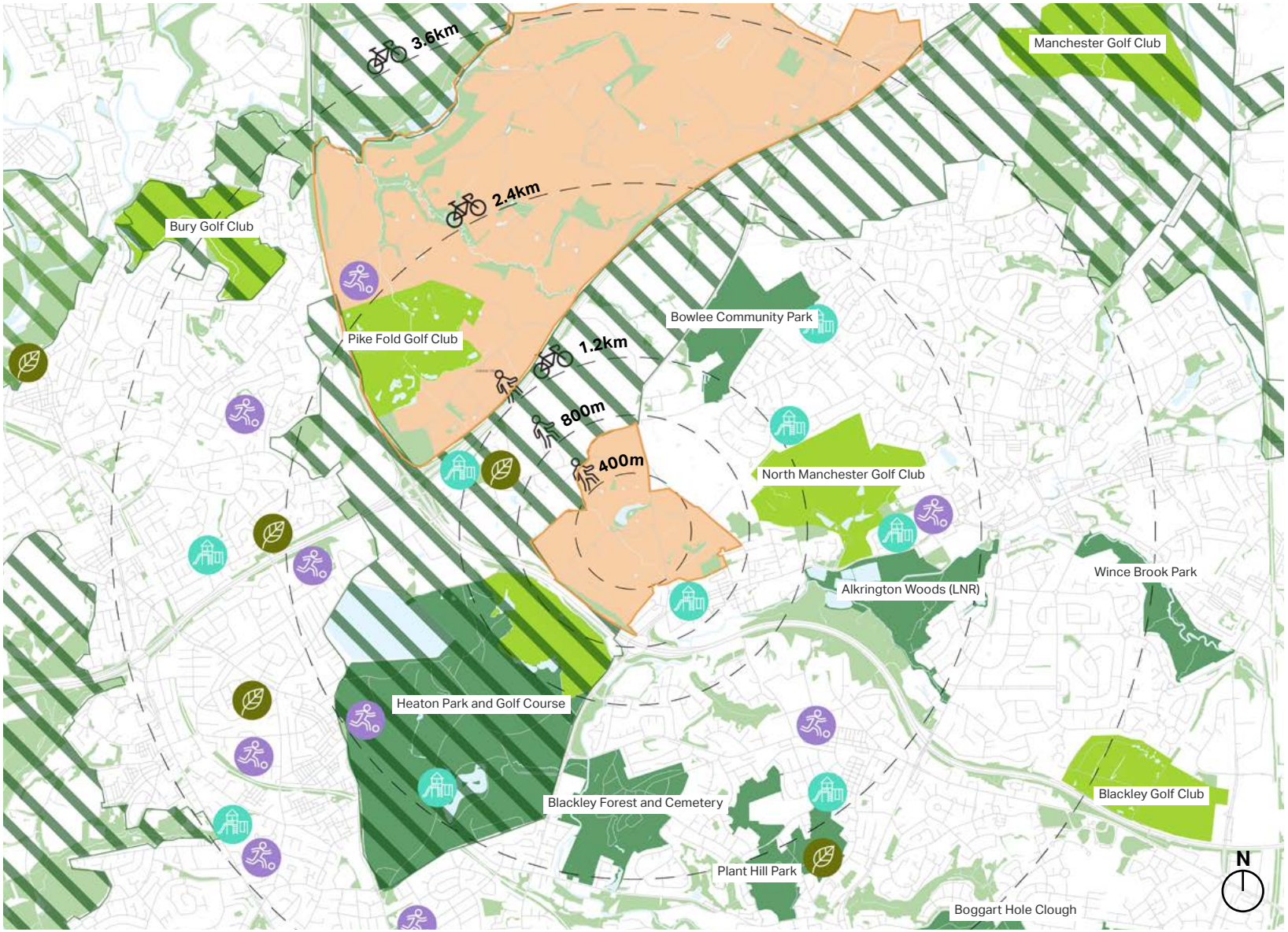


Figure 18: Plan showing existing green and blue infrastructure surrounding the Northern Gateway allocations

3.2.6 Flood Risk and Drainage

Characteristics and Constraints

There are no main rivers within the boundaries of the site. The Environment Agency flood maps identify that the site is located entirely within Flood Zone 1, therefore at the lowest risk of flooding (assessed as having a lower than 1 in 1000 annual probability of river or sea flooding).

There is localised risk of groundwater flooding across the northern part of the site and adjacent to the unnamed watercourse which flows north south through the site.

Opportunities

There are opportunities to incorporate Sustainable Urban Drainage Systems (SuDS) on-site to attenuate surface water runoff prior to discharging into the local watercourses. Detailed future designs for the development will ensure there is no increase to flood risk on the site or elsewhere as a result of the development.

3.2.7 Trees, Woodland and Hedgerows

Characteristics

There are several mature trees present throughout the site, comprising a mix of open grown and hedgerow trees within a combination of continuous, outgrown and fragmented hedgerows bordering the agricultural fields. Adjoining rear gardens accommodate a mix of ornamental shrub and small stature trees with tracts of hedgerow tree belts and shelter belt planting present in clusters at field boundaries across the site's rolling mixed farmland landscape. Woodland cover is present to the edge of central reservoir, although none of the on-site wooded areas are identified as Ancient Woodlands.

Opportunities

There are opportunities to retain and enhance existing hedgerows and trees, particularly on the site boundaries. There is also the potential to expand tree groups and hedges to extend the coverage and network.

However, given the topography of the site, and the likely necessity to create development plateaus, a cut and fill strategy across the site may result in tree and hedgerow loss. Replacement, mitigation and compensation will ensure new tree and hedgerow opportunities are created.

3.2.8 Retail and Services

Characteristics

Middleton Town Centre, which includes Middleton Shopping Centre, is located approximately 2km to the east of the site and offers a full range of comparison and convenience retail, and other key services. There are also local services, including a convenience store, Tesco Express and other local services; located in neighbourhood hubs in Langley to the east of the site (on Bowness Road and Wood Street), and on Manchester Old Road to the south east within 400m of the eastern part of the site. Prestwich Town Centre is also located approximately 3km to the west of the site, and also offers a full range of comparison and convenience retail, and other key services

Opportunities

The site offers the opportunity to provide integrated retail and community facilities to complement the existing offer in Middleton and Prestwich and to elevate amenity for future and existing residents. There are also opportunities to create new pedestrian connections which will improve permeability and access to existing local facilities and facilitate greater use.

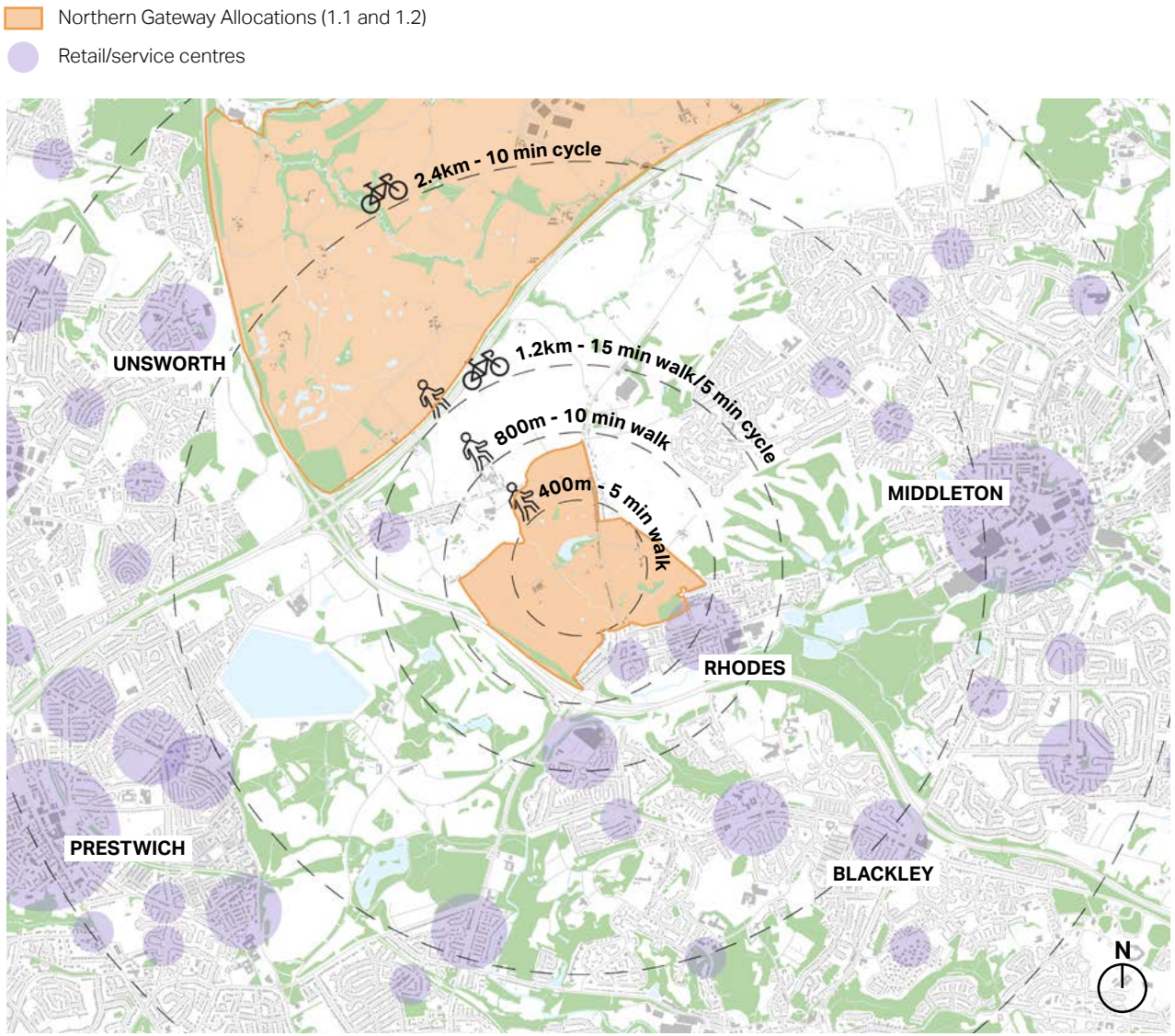


Figure 19: Plan showing existing retail/service centres surrounding the Northern Gateway allocations

3.2.9 Education

Characteristics

Within Bury there is limited local primary school provision, with no provision to the east of the M60. The nearest school within Bury is St Margaret's which is approximately 1.5km from the entrance to the development. Within Rochdale, for primary education, Within Rochdale, for primary education, Little Heaton Church of England Primary School is the closest facility and is located just to the east of the site. There is also Bowlee Park Community School which is approximately 1.5km northeast of the site.

In terms of Secondary School Provision, Parrenthorn High School is around 1.5km to the west of the site, Edgar Wood Academy is around 2km to the northeast, and Unsworth Academy and Brookhaven School are around 2.5km to the northwest, as the crow flies.

It is considered that Little Heaton currently provides sufficient capacity for the pupil yield arising from the part of the development which falls within the Rochdale Boundary.

However, there is anticipated insufficient capacity within other Rochdale primary schools in the area to meet pupil yield arising from the development. Therefore, given the scale of development availability of school places in existing schools and distance from Bury schools, new primary provision will be required on site.

Opportunities

In line with PfE Policy for JPA1.2, there is a need to make provision for a new on-site two-form entry primary school and for the development to provide a financial contribution for off-site additional secondary school provision to meet needs generated by the development.

3.2.10 Health Facilities

Characteristics

There are several GP surgeries within reasonable distance including the Family Practice and the Woodside Medical Centre in Middleton, which sit around 2km to the east of the site. There is also Whittaker Lane Medical Centre and St Gabriels Medical Centre on the west of Heaton Park, around 3km from the site. In Prestwich, there is the Longfield Medical Practice and in Unsworth there is the Unsworth Medical Centre, which are proximately 3km from the site.

Opportunities

There is a potential opportunity to co-locate new community and health facilities within the new Local Centre or for contributions to improving healthcare facilities in the surrounding area.

Key

- Northern Gateway Allocations (1.1 and 1.2)
- Supermarket
- Healthcare
- Church
- Mosque
- Secondary School / Sixth Form
- Primary School
- Nursery
- Leisure Centre

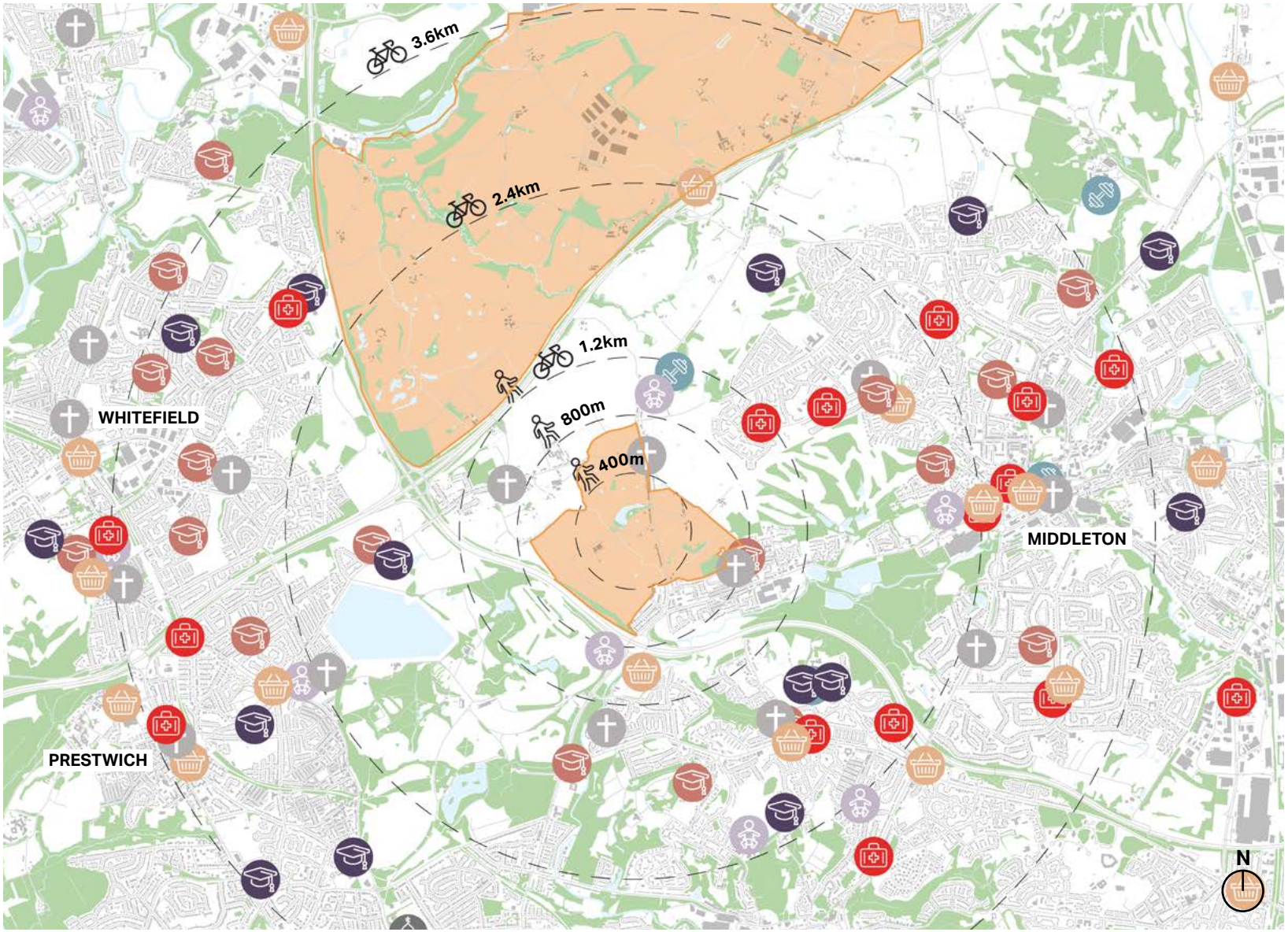


Figure 20: Plan showing existing local facilities surrounding the site

3.2.11 Topography

Characteristics

The eastern part of the site has an undulating topography which is more elevated and generally slopes towards the western and southern boundaries, towards the settlement edge of Middleton and Heywood Old Road. The western parcel has undulating topography which generally slopes towards the riparian corridor which flows through the centre of the site and as such has the general perception of a 'valley'.

Opportunities

In response to the topography of the site, there is an opportunity to implement a cut and fill strategy to create development plateaus across the site.

3.2.12 Geotechnical and Ground Conditions

Characteristics

The site predominantly comprises agricultural land which is not expected to contain significant areas of contamination that would affect the future development of the site.

The following low level potential geo-environmental risks have been identified (see table below):

Opportunities

The assessment work undertaken to date has not identified significant potential risks associated with contamination. The potential geotechnical constraints and associated standard mitigation measures can be incorporated into the design of the scheme

Area of Potential Contamination	Potential Mitigation
Backfilled historical quarries / pits.	Assessment of material, remediation (where required) and, where possible, re-use of material.
Ground gas	Ground gas protection measures may be required in new builds.
Potential for contamination of surface waters or shallow groundwater	Assessment of risk if areas of significant contamination of soils are identified. Remediation (where required) of contamination in soils is likely to significantly reduce the risk of potential impact to surface waters and/or shallow groundwater.

Table 01: Low level potential geo-environmental risks identified

3.2.13 Utilities

Characteristics

Existing utilities connect to Heywood Old Road (surface water, water main, electricity, gas, and BT). These include a 15-metre sludge main, a high-pressure gas main along Simister Lane, and a 275kV overhead line running east-west of the site. There are no utilities constraints that would prevent the development of the site.

Opportunities

There is an opportunity to utilise (and enhance where appropriate) existing utilities infrastructure, surface water, water main, electricity, gas, and BT, as well as the provision of new on-site infrastructure, to ensure that there is sufficient capacity to accommodate the development.

3.2.14 Air Quality

Characteristics

The site is partly located within the Greater Manchester Air Quality Management Area ("AQMA"). The principle sources of atmospheric pollution within and surrounding the site relates to vehicle exhaust emissions from the M60 to the west, and to a lesser extent Heywood Old Road to the east.

Opportunities

Opportunities exist to respond to air quality through the scheme's design. This should include the sensitive positioning of dwellings, the provision of green and blue infrastructure networks and the integration of sustainable means of transport. These can also help to improve and tackle air pollution.

Future development traffic can be reduced and controlled through suitable mitigation; and there is an opportunity to move away from petrol and diesel vehicles through the inclusion of household EV charging and improved public transport.

3.2.15 Noise

Characteristics

Road traffic noise, principally from the M60, M62 and Heywood Old Road (A6045), is the dominant noise sources around the site.

Opportunities

There are a variety of measures which can be implemented to minimise the impact of road traffic noise within the site, examples of which can include landscape buffers, building orientation and massing, acoustic barriers / bunds and a suitable scheme of sound insulation to dwellings.

Key

- Buildings
- Water
- Gas main
- Sludge main
- Water main
- Overhead electricity
- Public Right of Way
- Rochdale Way
- Contours
- Sand pit
- Utilities offsets (15m)
- Rhodes Green cropmark site
- Bradley Fold structural geology fault
- Historic land fill
- Viewpoints
- Designated site of ecological and geological importance
- Category A tree
- Category B tree
- Category C tree
- Category U tree (very poor condition - should be felled)
- Root protection areas
- Tree shading constraints
- Existing barn buildings, potential homes to nesting birds
- Better condition, unmanaged and species diverse grassland
- Neutral grassland featuring orchids, species diverse grasses and wildflower
- Species diverse grassland
- Wildlife habitat to be protected
- Best preserved hedgerow
- Arable land
- Ploughed land

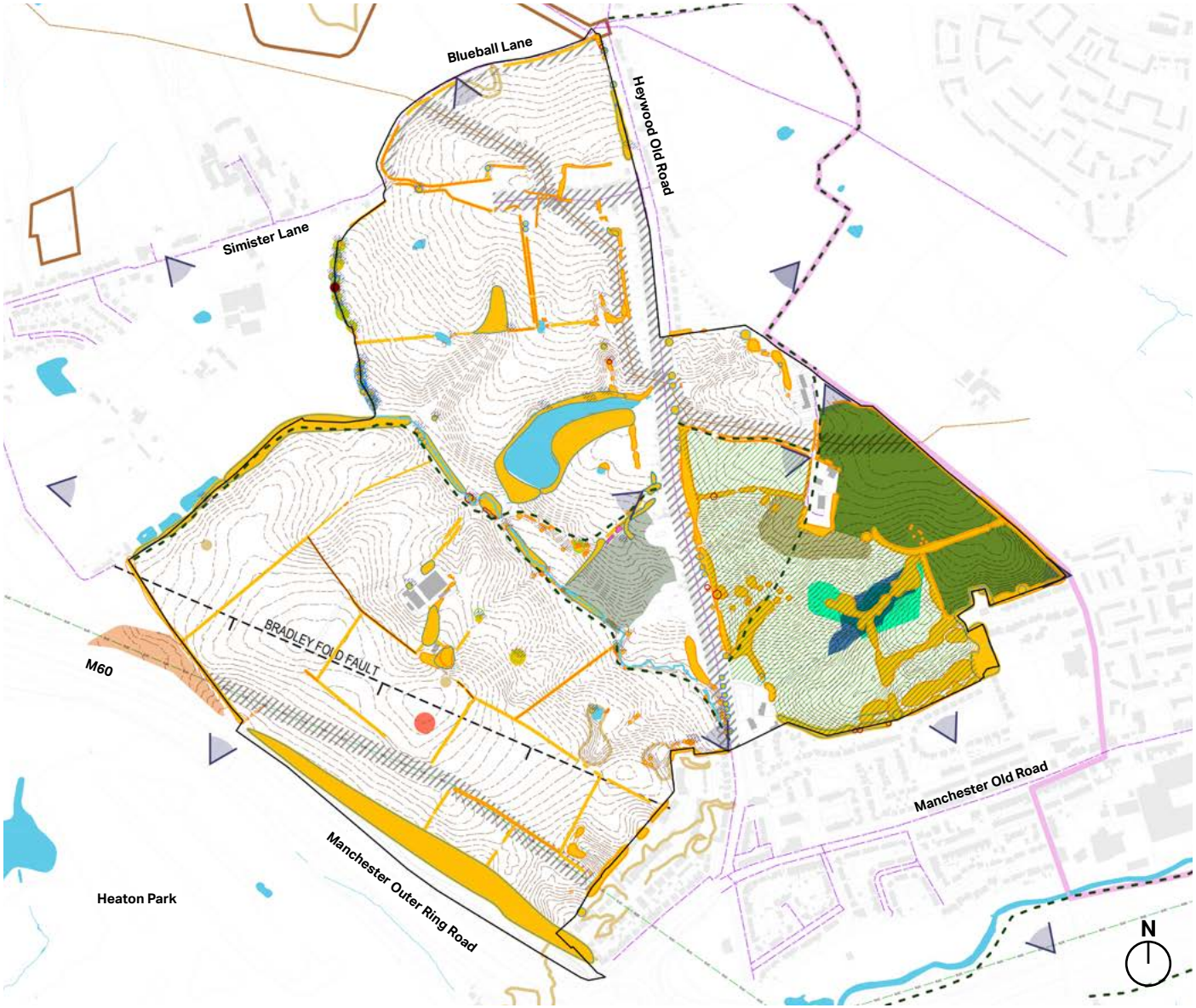


Figure 21: Site constraints diagram

Key

- Existing buildings
- Water
- Existing motorway bridge
- Existing pedestrian crossing point
- Existing vehicular crossing point
- Rochdale Way
- Existing trees and wooded areas
- Existing hedgerows
- Opportunity to create multi-functional, green corridors enhancing active travel, amenity, SuDS, BNG, and landscape
- Potential pedestrian access point
- Potential vehicular access points
- Opportunity for green nodes
- Opportunity to enhance brook crossing (subject to viability and technical justification)
- Opportunity to enhance views and vistas in and out of the development
- Potential public transport connection to Simister Lane
- Connect to existing Public Rights of Way
- Opportunity to enhance gateways
- Opportunity to incorporate existing hedgerows into green links



Figure 22: Site opportunities diagram



04

Vision & Strategic Objectives

4. Vision & Strategic Objectives

The site presents an opportunity to deliver a well-planned new neighbourhood supported by new community and transport infrastructure.

Vision

A thriving new neighbourhood where People, Planet, and Place come together.



Building a Healthy, Connected Community



Designing for Nature



A Place to Belong, Grow, and Thrive



Simister Bowlee presents an opportunity to deliver a **well-planned new neighbourhood** supported by new community infrastructure that will support the **sustainable growth** of Atom Valley Mayoral Development Zone (MDZ) and the transformational **employment-led opportunity** within the wider Northern Gateway (JPA1.1)



4.1 The Vision and Opportunity

Simister Bowlee will help address Greater Manchester's acute housing and affordability crisis by delivering a diverse mix of homes for all life stages, supported by essential community facilities, a new primary school, and accessible green spaces. Located across Bury and Rochdale, this neighbourhood will become a place for **future generations to live, work, and play.**

A thriving new neighbourhood where People, Planet, and Place come together.

The Simister Bowlee site, will provide the key components for a sustainable and successful neighbourhood. Our vision is to create an attractive and safe place where people feel a strong sense of belonging, both for new residents and the surrounding communities.

The site will feature a mixed-use Local Centre that fosters community life. The facilities will be tailored to the needs of the community and could include local shops, health facilities, community space, growing gardens, and green parks, creating spaces for everyday living, social interaction, and shared experiences.

The new neighbourhood will embrace sustainability as a way of life. Green spaces will be welcoming and accessible to all, while an integrated landscape strategy will respond to the area's character, enhancing biodiversity and visual appeal.

Nature will be interwoven throughout the community, including meadows, river corridor, ponds and managed woodlands that will support wildlife, provide access to the countryside, and offer opportunities for recreation, environmental learning, and well-being.

Simister Bowlee is a place where people and nature thrive together, an inspiring model of connected, sustainable living.

4.2 Strategic Objectives

Twelve objectives have been developed to support the vision for the site, which will seek to deliver an inclusive new community, new homes, facilities and the essential infrastructure required to support development.

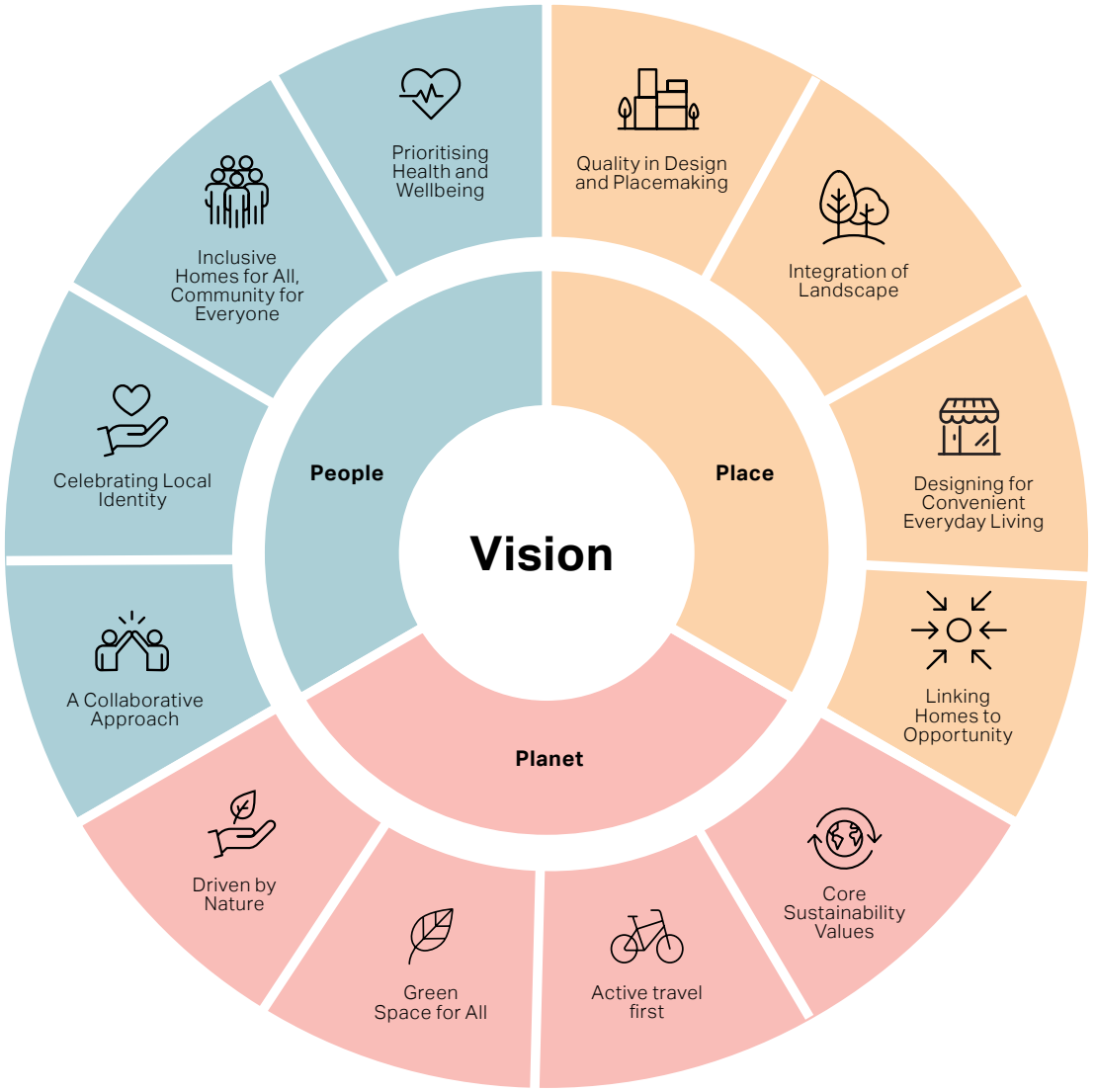


Figure 23: The twelve guiding development themes supporting the vision, grouped under the headings of people, planet and place

4.2.1 People - Building a Healthy, Connected Community

Prioritising Health and Wellbeing

The site will be designed for life in balance with people's physical, mental, and social well-being at the heart of the neighbourhood. Safe, walkable streets, green corridors, and active travel routes will support healthier lifestyles, reduce air pollution, and encourage outdoor activity. Pocket parks, nature trails and accessible play spaces will create environments for people to connect and enjoy.

Inclusive Homes for All, Community for Everyone

Development will deliver high-quality homes across a range of tenures and types, and will include affordable housing and specialist homes where there is a need, ensuring that people at every stage of life can find a home that suits. The neighbourhood will support local and changing needs.

The provision of uses that may include local shops, a primary school, healthcare provision, and community spaces, will form a sense of place and community. The neighbourhood will be a place to meet, to learn, to grow, and to belong.

Celebrating Local Identity

Drawing inspiration from the surrounding heritage, street patterns, landscape character and sloping topography, the site will be shaped by context. Community-focused design will respect the area's history while promoting social interaction through shared spaces, events, and initiatives. Community gardens, orchards, and cultural projects will knit new residents into the fabric of existing communities.

A Collaborative Approach

Development will be driven by inclusive engagement between councils, landowners, developers, local communities, and stakeholders. Collaborative engagement is central to the design process and will shape the future development of the site.



Figure 24: Parks and fitness trails encourage social cohesion and active outdoor lifestyles

4.2.2 Place - A Place to Belong, Grow, and Thrive

Quality in Design and Placemaking

This site will deliver outstanding placemaking, creating distinctive public spaces and high-quality streets that respond to local heritage, context and landscape character. A clear design code and urban design principles will ensure high-quality development that reflects the local area's character, integrating homes that blend seamlessly with the landscape and neighbouring settlements. It will foster a cohesive neighbourhood with diverse character, ranging from winding lanes to tree-lined streets, parks and wildflower meadows.

Integration of the Landscape

The site will stitch into its surroundings, respecting and enhancing connections to the surrounding Green Belt and the interface with the countryside. The landscape will permeate through the development, into the community, through river corridors, meadows and parks.

Designing for Convenient Everyday Living

The neighbourhood will be built on the principle of improved accessibility. New and enhanced active travel links will improve access between the surrounding communities, Simister Village, Middleton and key employment destinations such as JPA1.1. New sustainable active travel infrastructure, will foster use of improved walking, wheeling, cycling, and public transport options.

Linking Homes to Opportunity

The neighbourhood has the scale and location to support the transformational economic potential of the wider Northern Gateway and Atom Valley. By providing the homes and community infrastructure needed to support new job growth, including up to 20,000 jobs at JPA1.1, it will anchor a thriving, future-ready neighbourhood. The integration of housing with employment, education, and community services will support a circular economy and attract long-term investment. This synergy will be further supported by increased accessibility and sustainable active travel modes to new jobs, which will support the demand for new housing, driven by a major new employment destination.



Figure 25: Development features a green pedestrian, wheeling, and cycle connection, encouraging active travel

4.2.3 Planet - Designing for Nature

Driven by Nature

Nature will define a masterplan for the site, not just as a backdrop, but as a design driver. Existing natural assets like the river valley, hedgerows, and woodland will be enhanced and reconnected through an integrated green infrastructure network. Nature corridors, wetlands, and rewilded spaces will support biodiversity, create safe habitats, and offer opportunities for play, learning, and wellbeing.

Green Space for All

Green space will be accessible from any location within the site. A connected system of multifunctional green spaces, parks, play areas, sports pitches, gardens, wild spaces, allotments and growing areas will serve both ecological and amenity functions. Play areas, community orchards and nature trails will provide places for people of all ages to relax, explore, and reconnect.

SuDS features such as swales and ponds will manage water sustainably, support biodiversity, and enrich the site's environmental resilience.

Active Travel First

The design of the site will deliver pedestrian and cycle infrastructure to encourage walking, wheeling and cycling across and beyond the site. Safe, green corridors and direct routes will connect homes with the community hubs, schools, the countryside, surrounding facilities and future planned public transport links. Prioritising active travel will reduce emissions and support healthier living.

Core Sustainability Values

Sustainability is embedded in every layer of the masterplan. From site-wide strategic decisions to detailed delivery, development will adopt a fabric-first approach to minimise carbon emissions and energy demand. Buildings will incorporate renewable technologies, promote efficient water and energy use, and support the transition to net-zero.



Figure 26: Swales as an integral part of a housing scheme



05

Design Approach

5. Design Approach

This chapter illustrates how the site constraints and opportunities, the site context, overarching vision and the policy framework have informed a set of design principles for the site. These principles have underpinned the indicative masterplan and will inform the design and delivery of future planning applications that come forward.

5.1 Design Principles

The six design principles articulated on this page should shape the development of the site. The overarching design principles will inform a detailed Design Code that will be submitted alongside a planning application for the site, to ensure that the design of site delivers high quality placemaking and adheres to the vision set out in this framework.



5.1.1 Connected Communities



5.1.2 Landscape Network



5.1.3 A Seamless Transition to the Countryside



5.1.4 Enhance the River Corridor



5.1.5 Respond to Views and Topography



5.1.6 Transition with Interfaces and Edges

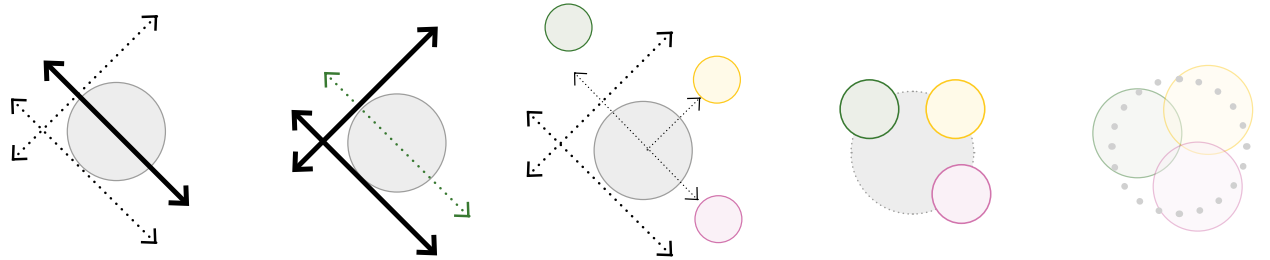
5.1.1 Connected Communities



Figure 27: Concept sketch showing enhanced connections between local communities

The site is severed into two parts by Heywood Old Road. The development offers the potential to reconnect Simister Village by active travel (but not general vehicle access) to the site and Rhodes to the east and south.

Improving connectivity through a network of green routes, that encourage walking, wheeling and cycling and reduce the reliance on the car for short trips, will serve to enhance permeability across new and existing communities.



5.1.2 Landscape Network

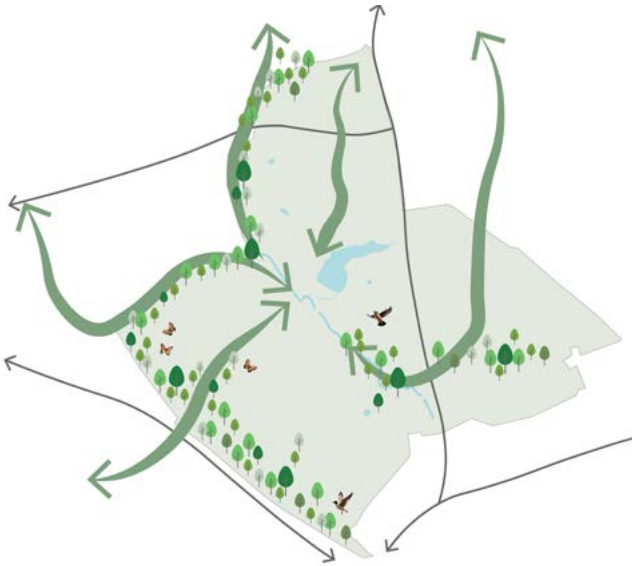


Figure 28: Concept sketch showing enhanced connections between the site and surrounding landscapes

Integration with the surrounding countryside

The development should be carefully designed so that the character and beauty of the surrounding countryside flow naturally into the site. Strategic buffer planting should be considered to enhance biodiversity but also provide effective screening, softening the visual impact of buildings and ensuring that key views remain protected.

Inclusive access to green space

Every resident, regardless of location within the development, should have direct and convenient access to high-quality green areas. These spaces will be designed for both leisure and wellbeing, offering places for relaxation, play, and community activities.

Proximity to nature

The site location allows people to be within easy reach of the wider countryside, encouraging walking, cycling, and outdoor exploration. This close connection to nature should be considered in the site design to promote a healthier lifestyle and foster a strong sense of place.

Replenishment and replacement

Whilst development could result in some loss of hedgerows and trees, new wildlife corridors, hedgerows and tree belts will be established to create additional and a greater span to benefit wildlife. Thoughtful and quality new landscape and habitats should integrate within the development to foster a positive interaction of fauna, flora and people alike.

5.1.3 A Seamless Transition to the Countryside

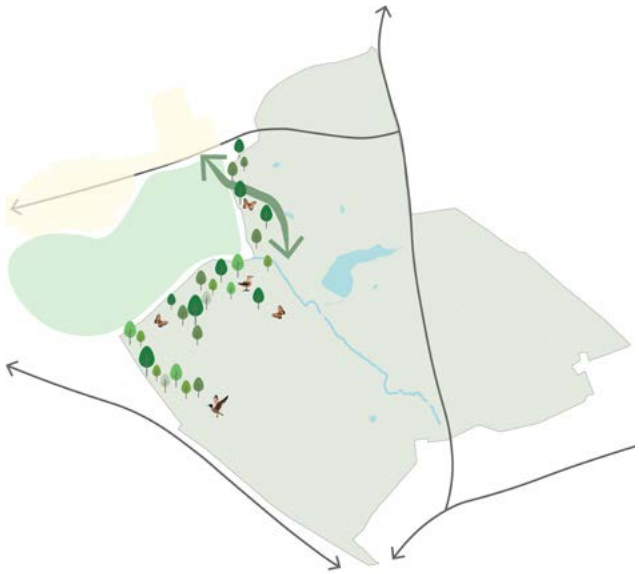


Figure 29: Concept sketch highlighting a seamless transition to the countryside

Avoid urban sprawl and homogeneous development

New development should respect the existing character of the area. It is particularly important to retain separation between Simister Village and any new development, to create a robust defensible edge between the Green Belt and the site, thus protecting the identity of the existing village. Public transport/active travel connections will be allowed within this area of the Green Belt, to help serve both Simister and the new development.

Landscape buffers to soften edges and provide visual separation

Design should introduce green spaces, tree planting, and natural screening to create a softer transition between existing residential areas and the new development. These buffers would act as visual breaks, preserving the rural setting and reducing the perception of encroachment and will have the added benefit of providing additional connectivity across the site for protected species.

Reduced density to form a transition to the countryside

Development should lower the scale and intensity of buildings towards sensitive neighbours. This approach ensures a more natural visual connection between the built environment and the rural landscape. This is especially important at the western edges of the site to retain separation between Simister Village and the new development.

5.1.4 Enhance the River Corridor

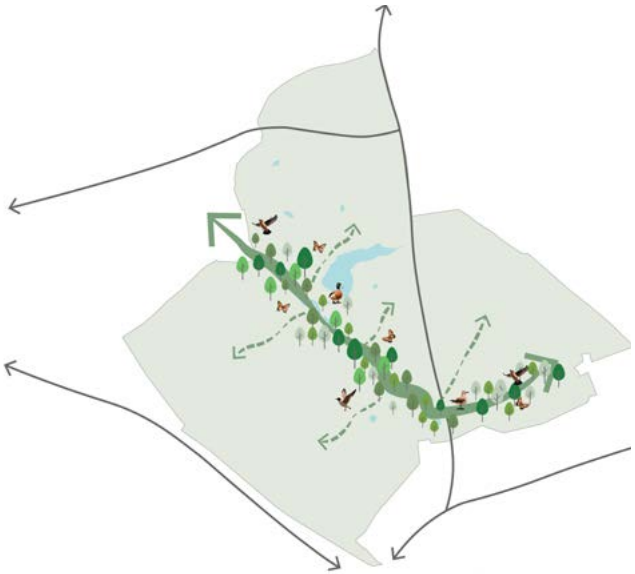


Figure 30: Concept sketch highlighting a central wildlife corridor focused around the brook

The brook and the surrounding valley form the site's primary natural asset, offering both ecological importance and visual character. They provide a distinctive landscape setting, create a sense of place, and act as a foundation for biodiversity and recreational opportunities.

A multifunctional wildlife corridor should be designed to weave through the landscape, delivering a rich, connected habitat for wildlife while supporting SuDS. This corridor provides robust connectivity, enhances ecological resilience and offers an attractive amenity space for the community, encouraging interaction with nature and promoting environmental stewardship.

5.1.5 Respond to Views and Topography



Figure 31: Concept sketch highlighting how key views could be identified and considered on site

Views out of the site should be enhanced and framed to take full advantage of surrounding landscapes, architectural features, and natural vistas. This should consider the positioning of buildings, open spaces and windows to capture key sightlines while eliminating visual clutter.

Views into the site should be mitigated through a sensitive and context-driven design approach. Strategies should include selecting an appropriate scale and massing for buildings, incorporating natural and built screening elements, and using planting schemes, fencing, or earthworks to soften the visual presence within views from surrounding areas.

5.1.6 Transition with Interfaces and Edges

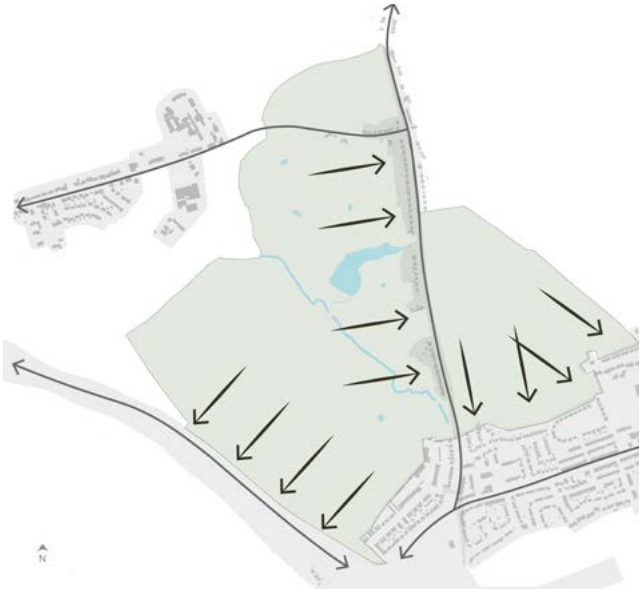


Figure 32: Concept sketch highlighting the need for a sensitive transition with interfaces and edges

Development integration with local context

The proposed development should be carefully designed to respect the surrounding settled context and character of Simister, Heywood Old Road, and Manchester Old Road. This should involve a considered approach to building scale and heights, layout, and street patterns; to ensure continuity with the established character, while also respecting local heritage features and views.

Varied neighbourhood character

The Design Codes that will support future planning applications should explore creating variety in character and identity across the development site. Built form, street pattern, architecture, materials, landscape treatments, and boundaries will be tailored to reflect and enhance the distinctive qualities of each context, while creating a cohesive place.

Sensitive treatment of site edges

Interfaces and edges of the site should be carefully managed to ensure appropriate transitions to neighbouring uses and to reflect the surrounding landscape character. This includes maintaining adequate privacy distances through the use of building setbacks, orientation, and the incorporation of landscape buffers such as planting belts, hedgerows, and tree lines to create a sense of enclosure and visual screening.

Enhanced green corridor

A strengthened and expanded green corridor will form a natural buffer along the M60 motorway edge, softening the visual impact of infrastructure and providing ecological benefits, such as feeding and movement corridors for bats, and nesting opportunities for birds. This green interface would create a more attractive environment for residents, encourage biodiversity, and contribute to a cohesive network of green spaces within and around the development.



06

The Masterplan Framework

6. The Masterplan Framework

The characteristics, constraints and opportunities identified in Chapter 3 have shaped the vision and objectives for the site presented in Chapter 4 and influenced the design principles summarised in Chapter 5. This chapter of the SBDF introduces the masterplan for the site. It sets out how proposals apply the vision, objectives and design principles to create the essential elements of a high quality and sustainable new place.

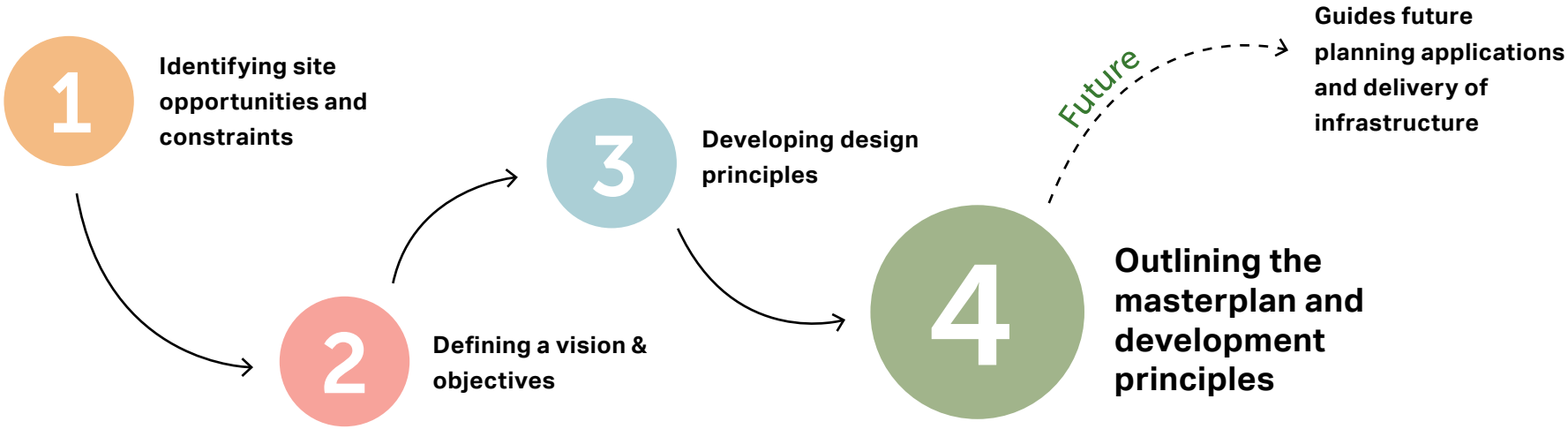


Figure 33: The process of developing the masterplan and development principles

Key

- PfE Allocation Boundary
- Existing buildings
- Existing waterways
- Existing motorways
- Existing roads
- Public Rights of Way
- Designated site of ecological and geological importance to be enhanced and retained
- Existing trees, hedges and woodland
- Existing overhead electricity/pylons
- Existing motorway crossing point and pedestrian connection to Heaton Park
- Vehicle access (indicative)
- Vehicle access (public transport only)
- Restricted vehicle traffic/no through connection for general traffic
- Primary roads (featuring cycleways and public transport)
- Secondary roads
- Pedestrian and cycle connections
- Buffer corridor
- Linear park
- Public open space
- Green corridors (including landscape, swales and pedestrian routes)
- Parks and play areas (indicative)
- School playing fields
- Community growing gardens (indicative)
- Community/retail hub (indicative)
- Primary School (indicative)
- Primary School (alternative location)
- Older person's accommodation (indicative)



Figure 34: Simister Bowlee Masterplan Framework. Please note: numbers relate to text on the following page.

6.1 Masterplan Framework

The following highlights have been identified in Figure 34:

1. Primary vehicle access to the development is via Heywood Old Road.
2. Integration of existing Public Rights of Way (PRoWs) into the development, linking new footpaths with the wider movement network.
3. A multifunctional nature corridor runs east–west through the site, serving as a defining landscape feature with nature trails, ecological enhancements, and SuDS elements.
4. Green corridors follow existing hedgerows, providing attractive, pedestrian-friendly connections with footpaths that encourage active travel and link east–west and north–south to surrounding facilities and the countryside.
5. Connectivity to Heaton Park: pedestrian routes to Heaton Park via the existing motorway bridge crossing.
6. Local Centre: positioned near the site gateway, adjacent to David Lloyd Gym and close to Simister Village, serving both existing and new residents.
7. Hillside Community Park: includes a NEAP play area, ponds, cascading SuDS, terracing, seating, and viewpoints over the valley.
8. Community growing gardens near the community hub and older persons' accommodation that promotes social interaction and outdoor activity.
9. Nature Parkland: retains and enhances existing grasslands with wildflower meadows, woodland, and improved habitats.
10. Two-form primary school in a suitable and accessible location (preferred option)
11. Nature trails and informal footpaths run along the multifunctional corridor.
12. Opportunities for Pocket Parks at some key neighbourhood nodes to provide accessible green space and "play on the way" opportunities.
13. Culvert to provide vehicular access across the brook.
14. Landscape buffer and planting along the northern edge screen views from the Green Belt and create a strong development boundary.
15. Additional landscape buffering prevents urban sprawl and strengthens the Green Belt edge.
16. Woodland Edge and Linear Park (Urban Fringe): woodland enhancement and expansion to support wildlife, provide screening from Heaton Park, and offer acoustic mitigation from the motorway.
17. Retention and improvement of the SBI.
18. Landscape planting weaves through the development, softening edges and reducing visual impact.
19. Lower density homes set back behind large gardens at the edge of Simister Village.
20. Tree-lined avenues that create strong street frontages.

6.2 Character Areas

A series of character areas have been defined within the site. The location and extent of each area has been informed by environmental features, the surrounding context, and the landscape character. Future development should be designed to respond sensitively to the distinct qualities of each of the character areas.

Planning applications will include a design code and guidance for each character area, which should be developed in accordance with the recommendations set out in the National Design Guide, incorporating the ten characteristics: context, identity, built form, movement, nature, public spaces, homes and buildings, resources, and lifespan. An outline vision for each character area is described on the following pages.

A. Simister View

Positioned along the south western part of the site, Simister View will incorporate a formal linear street pattern, carefully arranged to follow the natural contours of the land alongside areas in the north securing views over the countryside and towards Simister Village.

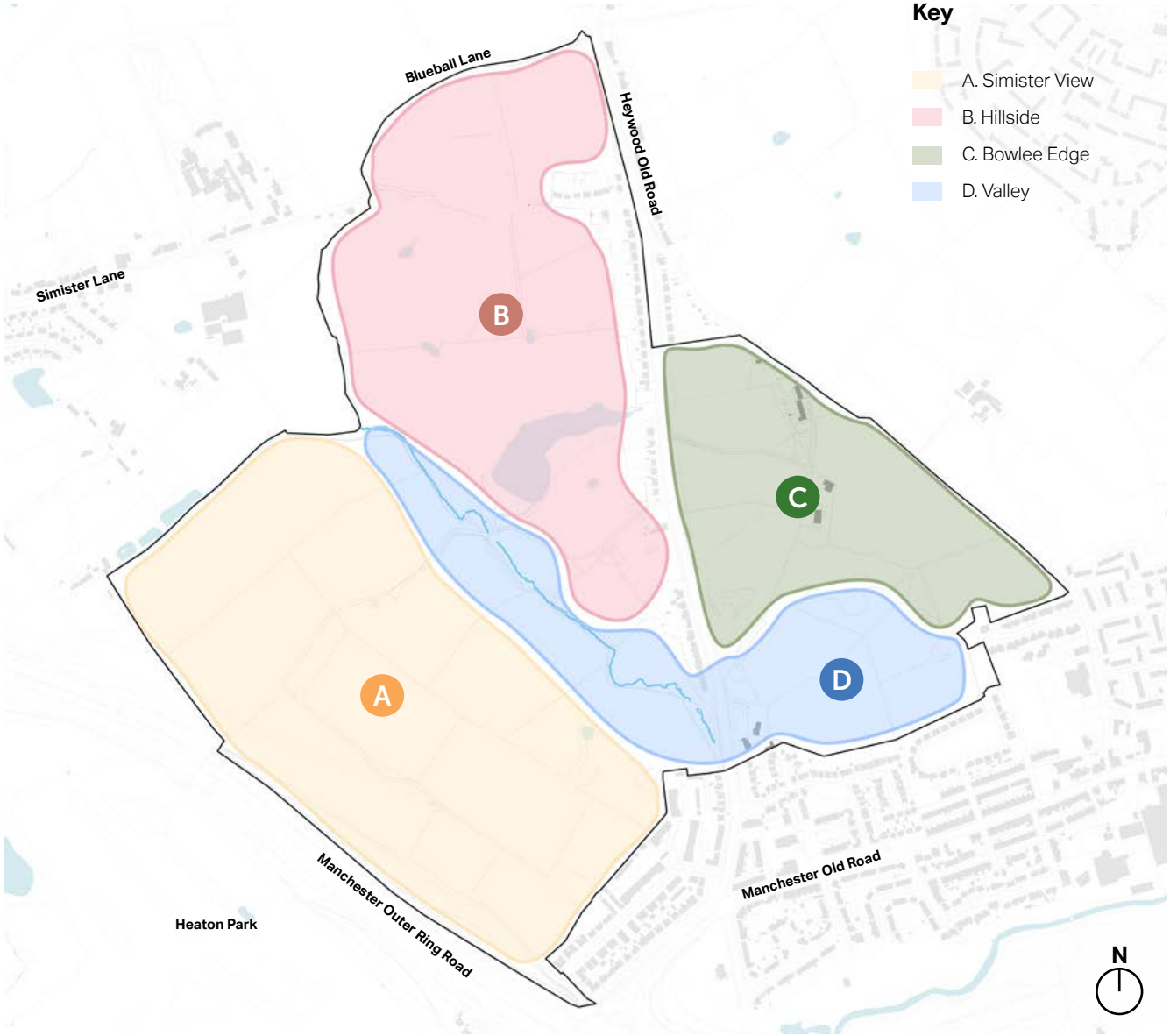


Figure 35: Indicative character areas plan

Greenery is woven throughout, with linear hedgerows framing streets and a new park acting as a key focal point, offering vantage views toward the river valley.

Woodland areas along the southwestern edge should be enhanced to create a robust landscape edge and linear parklands, enhancing ecology while providing a green outlook for the residents. Green corridors will run north–south, providing safe and direct pedestrian routes, while a primary north-south active travel route will connect Simister View to the wider neighbourhoods.

B. Hillside

Hillside is shaped in part by its sloping topography, with a more informal street pattern and homes oriented to capture views across the site to the south and west. This neighbourhood will blend buildings, trees, and green corridors, enriched by hedgerows and field lines that maintain a rural edge.

North–south pedestrian routes will encourage walking and cycling, while a proposed Pocket Park will provide a welcoming green heart for community life.

To the north of this character area there is the potential for a 'Local Centre' including a potential two-form entry primary school at its heart (subject to detailed design to identify an appropriate location within the site), small scale retail, and older person accommodation. All these uses are proposed to strengthen the sense of community and belonging, providing a vibrant and welcoming point of arrival. Designed for both new and existing communities, it should prioritise active travel with strong east–west and north–south connections.

C. Bowlee Edge

Bowlee Edge is defined by its topography, with homes taking advantage of open views to the east and vantage points capturing the Manchester City Centre Skyline. The neighbourhood will sensitively interface with established homes along Heywood Old Road.

Given the level changes across the site, Bowlee Edge will generally have a more organic grain and street pattern, with routes and development clusters responding to topography. Informal open spaces will weave throughout the neighbourhood, extending from a central green space surrounding the protected SBI.

Housing development footprints and plots should be designed to reflect the proportions of their surroundings. Development should be set back behind hedges (or other low boundaries to be agreed with the Local Authorities) where possible. Homes here will create a gentle edge to the settlement, ensuring where feasible the new blends seamlessly with the old.

D. Valley

The Valley will provide raised vantage points (in the north) offering extensive views across the brook and surrounding hillsides. The majority of Valley should provide informal open space, meandering nature trails and informal footpaths, which invite exploration. The experience is to connect with nature, providing opportunity for BNG enhancement, water, and greenery.

Development plots will positively respond to their landscape and ecological setting, with housing positively interfacing these open spaces , keeping the valley floor open to nature and recognising the importance of the SBI and its associated buffer zones.



07

Development Principles

7. Development Principles

The following Development Principles will inform the parameters for the development of the Simister Bowlee site and should be considered as part of any future planning applications. Bury and Rochdale Councils will require all planning applications to include supporting information that demonstrates how the development proposed addresses relevant development plan policies and incorporates the Development Principles.

Whilst the masterplan for the site is indicative, any significant deviation from the Development Principles must be justified by clear, robust and agreed evidence, that demonstrates why an alternative approach is required, with reference to the Vision and Objectives set out in Chapter 4.



Figure 36: A new development overlooking high quality landscaping. Homes provide natural surveillance whilst naturalistic green spaces provide habitats for wildlife.

The draft masterplan incorporates design principles which can be adopted to make development legible and easy to understand. These principles must be incorporated into all development proposals within the site.

7.1 Design

Development of the site should deliver high-quality, inclusive and sustainable places, particularly in terms of:

- Responding positively to the site's context and local character;
- Place-making and urban design quality;
- Sustainability and climate responsiveness; and
- Respecting and responding to the natural environment.

PfE Policy JPA1.2 also requires development to ensure the design and layout allows for effective integration with surrounding communities, including active travel links and connections to local services and the new areas of employment at Heywood/Pilsworth (JPA1.1).

PfE Policy JP-P1 sets out the key attributes that all development should be consistent with in order to meet the aim for the city region to be one of the most liveable city regions in the world, consisting of a series of beautiful, healthy and varied places.

PfE Policy JP-G6 requires development to be designed to support the positive use of nearby green spaces, such as by offering a high-quality setting, providing natural surveillance, and facilitating easy access by walking and cycling.

The following design principles must be incorporated into all development proposals within the site:

- Responding positively to and being informed by a thorough understanding of the local context and character, including:
  - The site's natural, built and historic environment;
  - The local townscape, landscape and setting;
  - Established patterns of development, street hierarchy and plot structure; and
  - Local materials and architectural features.
- Delivering high-quality and inclusive development that contributes to a distinctive sense of place, particularly in terms of:
  - Being visually attractive and distinctive, through architecture, materials and detailing;
  - Incorporating distinctive architectural reference points at key gateway locations and arrival points to assist with legibility;

- Using high-quality, durable and sustainable materials that are easily maintained and resistant to the effects of ageing, weather and climatic conditions;

- Ensuring that development blocks, individual buildings, streets and spaces function in a safe, inclusive and accessible way that creates a legible sense of place;

- Ensuring that the development makes an effective and efficient use of land and natural resources;

- Enabling effective, inclusive and safe patterns of movement with a clear hierarchy of routes within and around the development that promotes walking, wheeling, cycling and the use of public transport;

- Ensuring that the development is accessible to people with disabilities, the elderly and those with small children;

- Being safe and secure by minimising actual and perceived opportunities for crime, and anti-social behaviour;

- Making appropriate provision for gardens and/or outdoor amenity space;

- Making provision for high-quality green infrastructure, the provision of wildlife habitats and other wildlife-friendly features within the development;

- Ensuring opportunities are taken to positively integrate and enhance existing natural assets, such as river/brook corridors, into the development, where appropriate;

- Promoting health and wellbeing; and

- Considering opportunities for the incorporation of public art.

• Delivering development that is resilient to the ongoing and predicted impacts of climate change, particularly by:

  - Exploring opportunities to use low carbon materials where possible and feasible, to reduce the embodied carbon of new development;

- Ensuring opportunities are taken to optimise the effectiveness of solar energy installations through the site layout, building orientation and design;

- Providing high quality sustainable travel option for day-to-day needs via convenient walking, wheeling and cycling routes and catchments and easy access to public transport;

- Incorporating appropriate landscaping and urban greening; and

- Ensuring that the design includes an assessment of and response to existing hydrological characteristics to ensure the sustainable management of water in the design of a site. Sustainable drainage must be considered at the outset of the design process and integrated with the site landscaping, including tree-lined streets.

7.2 Housing

Policy JPA1.2 of PfE allocates Simister Bowlee for a new residential-led community which spans the Bury and Rochdale boundary. In accordance with Policy JPA1.2, up to 1,550 new homes should be delivered to diversify the type of accommodation across the Simister, Bowlee, Birch, and Langley areas.

Development should offer a broad mix of house types and sizes, including provision for families, first time buyers and affordable housing. This should include provision for custom and self-build plots (subject to local demand having regard to the Councils' self-build registers and other relevant evidence) as well as specialist and older persons housing, having regard to the latest Housing Needs and Demand Assessments.

All new dwellings must comply with the nationally described space standards and be built to the 'accessible and adaptable' standard in Part M4(2) of the Building Regulations unless specific site conditions make this impracticable.

The delivery of homes to meet the optional standard in Building Regulations Part M4(3) of the Building Regulations (or any subsequent revisions to the standard) is encouraged.

7.2.1 Affordable Housing

Development proposals should include the provision of affordable housing in line with Criterion 5 of PfE Policy JPA1.2 which requires provision for affordable housing to be in accordance with local planning policy requirements.

Proposals should include a range of house types, sizes and affordable tenures, and have regard to the latest Housing Needs and Demand Assessments. Affordable housing provision will be sought on site unless exceptional circumstances can be demonstrated that would warrant variations. Off-site contributions should provide the number of units that would have been delivered on site. Contributions should be in the form of units erected off site, the provision of land to build units or as a last resort, be in the form of a financial contribution (commuted sum).

The affordable homes should be fully integrated with the development and dispersed throughout the site, unless there are specific circumstances that warrant otherwise.

They should be indistinguishable from the market housing and built to the same specifications (i.e. not separate house types for affordable homes), unless there are particular reasons not to do so (e.g. if there is a specific requirement from a Registered Provider).

Care Home/Retirement Village

Provision should be made for specialist and older persons' housing to contribute to meeting identified needs in the latest Housing Needs and Demand Assessment. Specialist and older persons housing should be in an appropriate location to meet the needs of future residents.

7.2.2 Character and Density

The density and character of new residential development will be shaped by:

- Characteristics, constraints and opportunities at different locations, both within the site and within the surrounding context; and
- The need to deliver sustainable forms of development including efficient use of land, management of environmental impact and promoting travel by non-car modes.

The approach to residential density must align with PfE Policy H4. Development should maximise the opportunity to create sustainable homes in walkable neighbourhoods.

To optimise densities within the site, residential uses will also be acceptable in principle on the upper floors of retail and community uses.

Variations in density will help to create a mix of residential forms and typologies, helping to ensure a choice of housing while delivering an efficient and sustainable use of land.

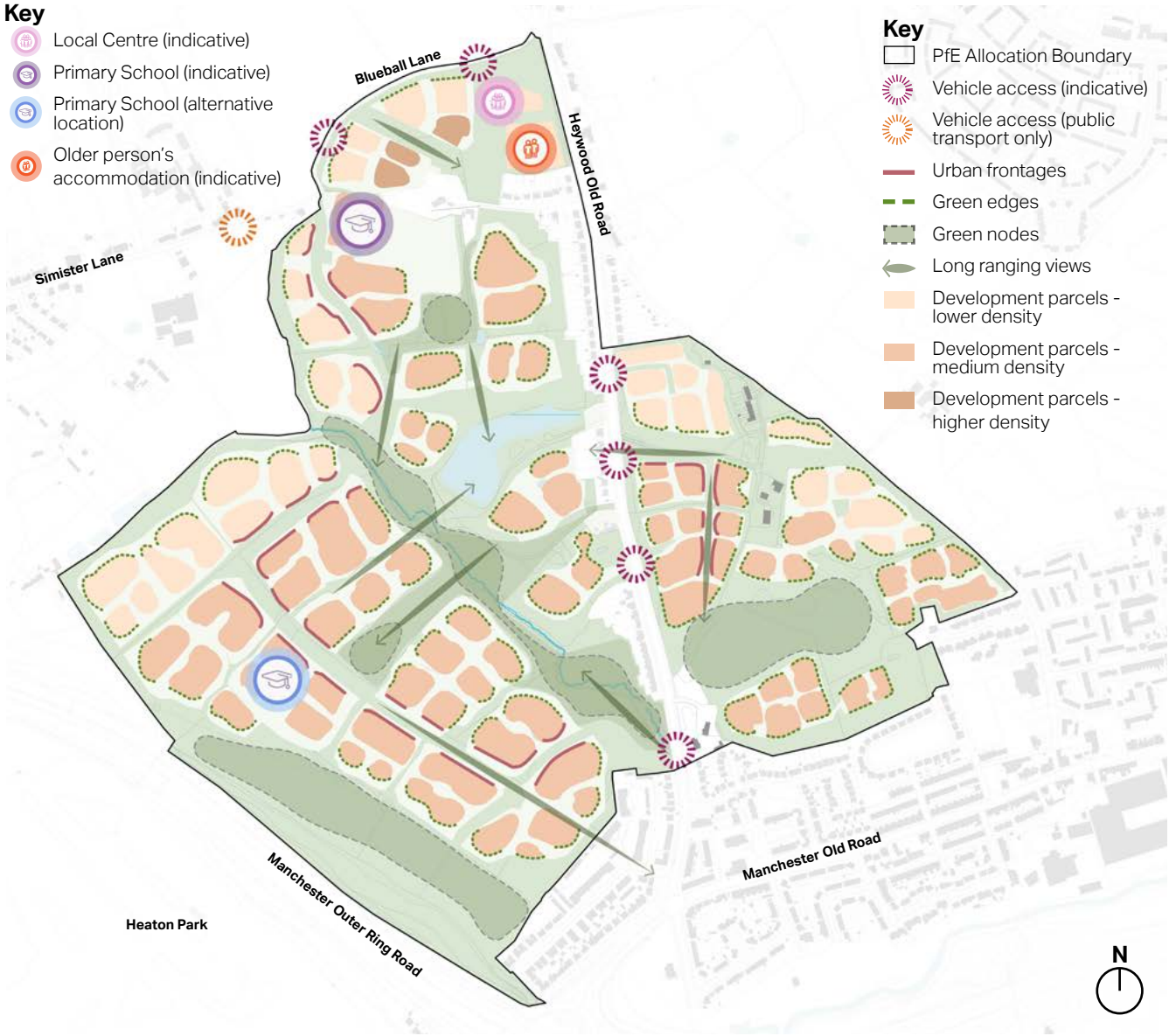


Figure 37: Indicative urban design framework and density plan

7.3 Access, Highways and Movement

Simister Bowlee is strategically located, with direct access to the highway network, and within proximity to the world class emerging employment destination at the Heywood Pilsworth site (JPA1.1).

An opportunity exists to elevate the accessibility and sustainability of the site by connecting it to surrounding communities and to the employment site at Heywood Pilsworth in a safe and sustainable way.

All development should be structured around a clear, coherent movement network that is resilient to an increasing quantum of development over time. This will be a legible and safe network both in its 'incomplete' early phases and incrementally through to final completion

Development should:

- Deliver a road system within the site that is in line with local design standards and that is capable of accommodating buses, with provision of bus stops and related infrastructure at optimum locations, and provision for active travel.
- Provide primary routes from the key vehicular access points as shown on the indicative movement, access and highways plan (Figure 38), connecting the development with surrounding area.
- Ensure high quality, convenient, safe and attractive walking, wheeling, cycling and equestrian routes where appropriate into and throughout the site.
- Provide off-site traffic mitigation measures to enable accessibility and mitigate highways impacts arising from the development.

In accordance with Policy JP-C8 (Transport Requirements of New Development) of the PfE Plan, a detailed Transport Assessment and Framework Travel Plan will fully consider the access, highways and active travel strategy at the planning application stage. This will include detailed technical assessment and feasibility work, as well as engagement with the Local Highways Authority, to fully agree the transport measures, interventions and mitigation required. Transport Assessments will also be used to update the Infrastructure Delivery and Phasing Strategy for the site.

7.3.1 Access

Development at Simister Bowlee will be accessed from new junctions on the existing road network as shown on the masterplan framework and the indicative movement, access and highways plan. The key access principles for the site are proposed as follows:

Northern / Southern Zone (West)

- Vehicular access is proposed at the junction of Heywood Old Road and Blueball Lane, located at the northern boundary of the site, intended to be delivered via a new access and upgrade to Blueball Lane. This access will function as one of two gateways into the development at the northern extent of the site, with the capacity to accommodate a future Local Centre and to facilitate vehicular movement across the wider site.
- A vehicular primary access from Heywood Old Road at the southern extent of the site will act as another gateway to the site and be provided by a signalised junction on the A6045, connecting to an internal spine road that connects the northern and southern gateway access points.

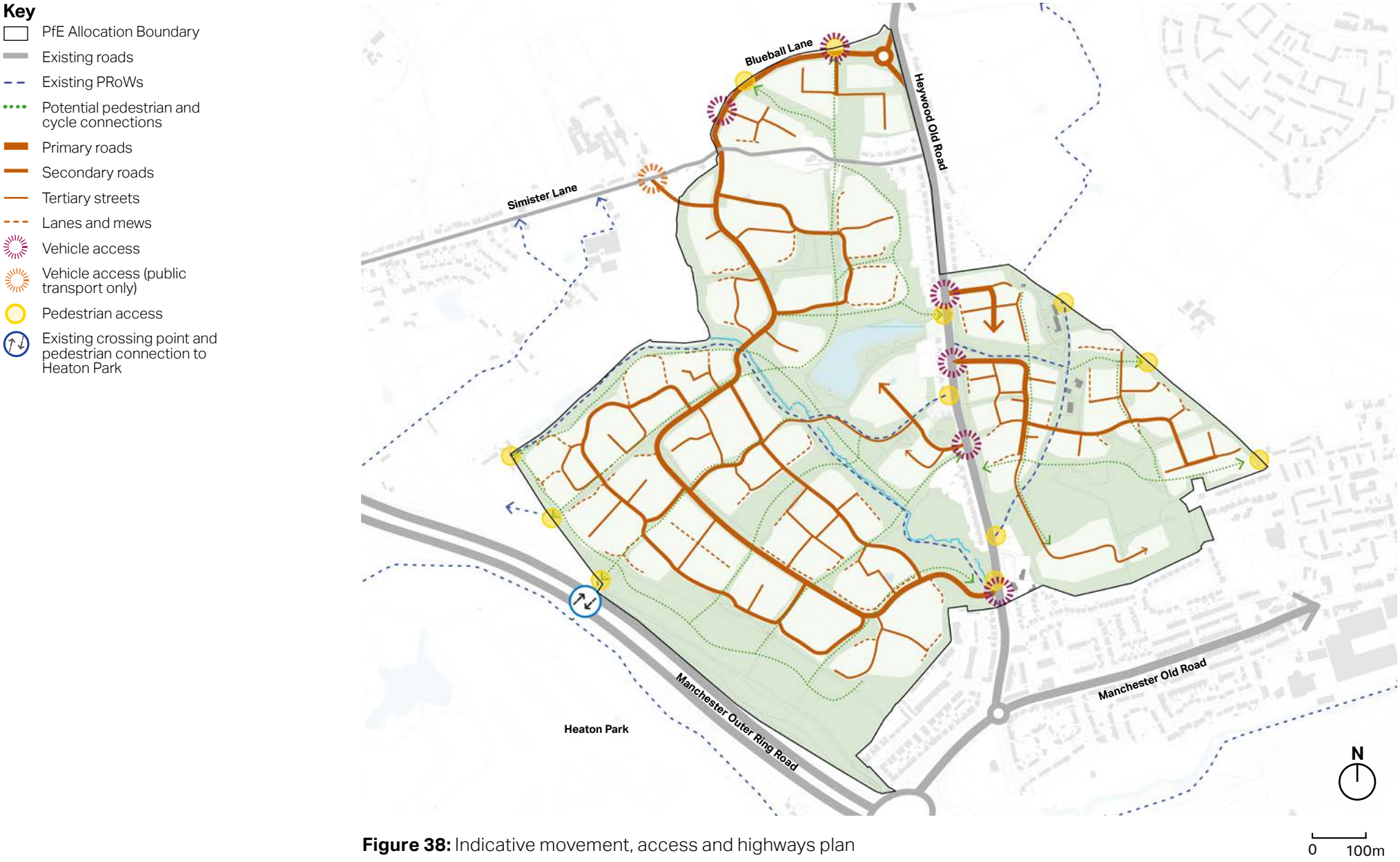


Figure 38: Indicative movement, access and highways plan

- A new spine road, designed in accordance with GM Streets for All design guidance, connecting the northern and southern access points, will be provided, which will facilitate access to a hierarchy of streets and development parcels that deliver a permeable, safe and legible network of routes across the site.

- Any planning application must seek provision for traffic restrictions on Simister Lane to the west, such that vehicular access is limited to public transport and active travel only. This may require infrastructure works outside of the Allocation to accommodate this.

Eastern Zone

- Suitable access points to the eastern part of the Allocation will be provided from Heywood Old Road, providing access to development parcels via an internal legible network of streets and roads.

Should for any reasons the access solutions proposed above not be suitable (as a result of further detailed design engineering), then alternative access solutions from Heywood Old Road would be required.

Bury and Rochdale Council will expect cohesive access and permeable connections on a site wide basis, to ensure access between development parcels is provided in a comprehensive way.

Additional points of vehicular access (emergency or other access, such as Management Company maintenance) may also be acceptable.

The preliminary design of access junctions should be informed by a Transport Assessment, Traffic Modelling and Traffic Surveys, prepared to support a planning application. This will ensure that the appropriate design, type and size of junction is provided – in accordance with Policy JP-C8 (Transport Requirements of New Development) of PfE.

The internal road hierarchy and layout will be designed accordance with PfE Policies JP-C1 (An Integrated Network), JP-C5 (Streets for All) and JP-C8 (Transport Requirements of New Development), as well as other relevant guidance, including the Manual for Streets.

7.3.2 Highways

Residential development at Simister Bowlee must be integrated with the wider highway network. All development will be expected to contribute towards the off-site highway works listed in Appendix D of PfE (together with any additional necessary measures identified through Transport Assessments) to improve accessibility and to mitigate highways impacts arising from the development. These include:

- M60 Junction 19 / A576 Middleton Road (localised junction improvements).

- M62 J19 / A6046 Heywood Interchange (interventions to be determined).

- Corridor improvements on A576 Middleton Road / Manchester Old Road in vicinity of M60 J19 (interventions to be determined).

- A6045 Heywood Old Road / A576 (junction improvements).

- A6045 Heywood Old Road / Langley Lane (junction improvements).

- Active travel improvements.
- Introduction of local bus services to, from, and potentially within the allocation.

Wider supporting transport initiatives, including a new Metrolink stop on proposed line between Crumpsall and Middleton and a Bus Rapid Transit ("BRT") corridor linking Manchester city centre and Rochdale via Heywood Old Road / Manchester Road; will also be supported in accordance with Appendix D of PfE.

7.3.3 Parking

Car and cycle parking will be provided in accordance with PfE Policies JP-C5 (Streets for All), JP-C6 (Walking and Cycling) and JP-C8 (Transport Requirements of New Developments and any associated guidance, including the Parking Standards in Bury SPD (June 2025) and the Rochdale Guidelines & Standards for Residential Development SPD (February 2016).

A parking strategy for the site should also promote the provision of Electric Vehicle ("EV") charging and shared mobility spaces, within proximity to the proposed Local Centre.

7.3.4 Active Travel

The promotion of sustainable modes of transport and permeable connections will be critical to the delivery of JPA1.2. Development should be designed to ensure ease of walking, wheeling, cycling; and equestrian movement where appropriate.

Active travel infrastructure will be required to be delivered both within and outside the site to support sustainable travel connections.

All development within the allocation should seek to conserve existing public rights of way (with diversions as appropriate), and improve walking, wheeling, cycling; and connectivity for both active travel and recreation through:

- Creating safe, attractive and integrated walking, wheeling, and cycling infrastructure, connecting the key neighbourhoods and character areas;
- Creating active neighbourhoods and street networks which are permeable to walking and wheeling, creating an incentive to walk and wheel;
- The enhancement of east-west pedestrian and cycle connections;
- Green links to enhance north-south walking and cycling and integrate the existing movement network including PRoW's;
- Connecting the existing settlements of Simister Village, Heywood Old Road and Manchester Old Road through a network of green routes, encouraging walking and cycling, reducing the reliance on the car for short trips;
- Improved access and safety to Heaton Park through green links, cycle and pedestrian access via an existing crossing point;
- Cycle storage and parking infrastructure including EV charging points.

The approach to active travel should have particular reference to PfE Policies JP-C5 (Streets for All), JP-C6 (Walking and Cycling) and JP-C8 (Transport Requirements of New Development). Active travel infrastructure may be required to be delivered in the immediate vicinity of the site, and outside of the allocation, to support sustainable travel connections.

7.3.5 Public Transport

Development within the allocation will be expected to make provision for public transport infrastructure including:

- The provision for bus services to traverse parts of the site, utilising the spine road and incorporating high quality bus waiting facilities (subject to agreement and feasibility).

Bus Infrastructure Provision

Accessibility by bus will be key to the sustainable development of the site. Consideration will need to be given to the location of bus stops along the spine road having regard to bus stop catchment areas. Active travel routes to and from bus stops, the nature and location of crossing points on the spine road and whether on-road bus stops or bus laybys are preferred. This will need to be agreed with the Councils and TfGM.

7.4 Ecology and Trees

Green spaces within the site provide the opportunity to retain and integrate areas of ecological importance, provide an opportunity for ecological mitigation and increase the biodiversity of the site.

An ecology strategy for the site prepared in accordance with PfE Policies JP-G7 (Trees and Woodland) and Policy JP-G8 (A Net Enhancement of Biodiversity and Geodiversity) should focus on protecting key habitats and species through implementation of the mitigation hierarchy to avoid, mitigate and, where necessary, compensate ecological effects. The following principles should be included within the ecology strategy:

- **Protecting sensitive habitats** – the landscape strategy should seek, where possible, to protect the site's areas of ecological importance, including:
  - The retention and enhancement of the existing brook corridor and valley on the western part of the site, which will create wildlife habitats and opportunities for recreational amenity space.
  - The retention and enhancement Bradley Hall Farm SBI on the eastern parcel of the site.
  - The retention and enhancement of existing hedgerows and trees, particularly on the site boundaries, where possible. Proposals should also consider expanding tree groups and hedges to increase woodland resilience, where it aligns with the Biodiversity Net Gain strategy.
  - Existing watercourses will be retained and engagement with third party landowners will be undertaken to explore recreational opportunities around these assets.
- **Maximising biodiversity value** - increasing the biodiversity and natural carbon sequestration value of retained green spaces, with the potential for enhancement of existing grassland (i.e. within green space and open spaces) and the creation of more diverse grassland. Biodiversity enhancement may also be delivered outside of the allocation subject to detailed ecological work.

- **Designing-in ecosystems** – upgrading ecosystems within the site by permeating landscape into the development plots and utilising streets, pedestrian and cycle routes for the creation of green and blue infrastructure corridors.

- **Managing people and nature** – creating footpaths and designated walking areas to protect wildlife from pedestrian use, including clear signage and natural boundary treatments, such as hedges, low timber railings and planting, will be used to prevent public access from key areas of habitat creation to ensure they are able to meet their condition criteria and contribute towards biodiversity net gain on site.

- **Mitigating impact** – retention of the Bradley Hall Farm SBI as part of a detailed ecological assessment, in accordance with Policy JP-G8 and JPA1.2. Ensuring appropriate mitigation for protected species using the site will be determined following completion of surveys, and as part of a planning application for the site.

Development should achieve at least a 10% Net Gain in biodiversity value as measured using a Statutory Metric, in accordance with the terms of the Environment Act 2021 and Places for Everyone Policy JP-G8 and the approach will follow the Biodiversity Net Gain Hierarchy. BNG may include both on-site and off-site improvements. Where off-site provision is proposed, priority will be afforded to measures within the Councils' identified receptor sites.

7.5 Sustainability, Energy & Carbon Reduction

Greater Manchester's ambition is to become a carbon neutral city region by 2038. This ambition is supported by Bury and Rochdale Councils through a declaration of a climate emergency.

Simister Bowlee offers the opportunity to support Bury, Rochdale and Greater Manchester's commitment to net zero through the delivery of a sustainable, low carbon neighbourhood. PfE Policy JP-S2 sets out the design and development standards to support sustainability objectives including promotion of low carbon development and renewable and low carbon infrastructure.

Applications for the development of the site should adopt a fabric-first approach to minimise carbon emissions and energy demand, with buildings incorporating renewable technologies, promoting efficient water and energy use, and support the transition towards net-zero carbon.

Development should be guided by PfE Policies JP-S2, JP-S3, and the GMCA Net Zero Design and Submission Guidance (Parts 1, 2 and 3). Further detail is set out in Chapter 10.

7.6 Flood Risk and Drainage

Future planning applications for the site should be accompanied by a Flood Risk and Drainage Assessment and Strategy, in accordance with PfE Policy JP-S4 (Flood Risk and the Water Environment) and the North West River Basin Management Plan. Detailed future designs for the development will take into account the overland flow routes and any groundwater flood risk and potential areas of ponding to ensure there is no increase to flood risk on the site or elsewhere as a result of the development.

The drainage strategy for the site should maintain natural water flows incorporating SuDS, providing attenuation measures and preserving inflows into existing watercourses. A drainage strategy should incorporate the following principles:

- Locating and designing development to minimise the impacts of current and future flood risk to increase resilience to flooding.
- Utilising natural onsite drainage and storage features, including brooks and ponds.
- Managing surface water run-off through sustainable drainage systems and as close to source as possible. Surface water run-off should be restricted to mimic or improve upon greenfield run-off rates.
- Ensuring that sustainable drainage systems:
  - Are designed in accordance with GM SUDS Design Guidance to provide multifunctional benefits wherever possible, including for water quality, nature conservation and recreation.
  - Avoid adverse impacts on water quality and any possibility of discharging hazardous substances to ground.
  - Are managed and maintained appropriately to ensure their proper functioning over the lifetime of the development.

7.7 Heritage and Archaeology

A Heritage Statement should be prepared to accompany any planning application that sets out how development will consider and conserve the setting of Heaton Park, as well as other local statutory and non-statutory heritage assets, in accordance with PfE Policy JPA1.2 and JP-P2 (Heritage) and an archaeological strategy will be agreed to support the future planning applications, through the assessment of its archaeological potential and the development of tools to ensure the proposals respond appropriately to any potential effects on the historic environment.

7.8 Education

PfE Policy JPA1.2 requires the provision of a new two-form entry primary school and make financial contributions for off-site additional secondary school provision to meet needs generated by the development, in accordance with policy JP-P5.

A new two-form entry primary school is proposed within the north-western parcel of the development close to the Local Centre, ensuring convenient connections for residents. The school location will seek to reduce reliance on car travel for short trips and support walking and cycling to school.

The masterplan in Section 6 identifies the preferred location within the site however an alternative location has also been identified on the masterplan. Detailed design will confirm the final location of the school.

Initially it is likely that the primary school is developed as a one-form entry school, increasing over time to a two-form entry school if required. The precise timing of delivery of the primary school will be determined by the Council's Education Needs and Demand Assessment and the wider Infrastructure Delivery and Phasing Strategy for the site.



Figure 39: Preferred and alternative locations identified for the school

PfE Policy JPA1.2 requires the provision of a new Local Centre in an accessible location which includes a range of appropriate facilities such as retail, health and community provision. An indicative location for the Local Centre is shown on the Masterplan to the north of the western part of the site, within proximity of the David Lloyd Health Club and existing communities at Simister and Langley, to further enhance the role of the wider area as a community destination.

7.9 Local Centre

PfE Policy JPA1.2 requires the provision of a new local centre in an accessible location which includes a range of appropriate facilities such as retail, health and community provision. The Local Centre should be provided in a location which secures strong footfall and encourages active travel.

Any retail development within the Local Centre should be of a scale that serves the needs of the surrounding neighbourhoods to avoid it generating vehicular based visits from the wider area.

An indicative location for the Local Centre is shown on the Masterplan to the north of the western part of the site, within proximity of the David Lloyd Health Club and existing communities at Simister and Langley, to further enhance the role of the wider area as a community destination.

This location will create a strong sense of arrival at a key access point. Its siting will ensure a positive relationship between new buildings, the public realm, and sustainable movement corridors, contributing to a safe and welcoming environment for residents. New active travel and associated cycle and public transport infrastructure will be supported alongside the Local Centre, to encourage sustainable travel and transport connections.



Figure 40: One possible location for the Local Centre, within proximity of existing communities at Simister and Langley.

7.10 Green Infrastructure

7.10.1 Landscape

The vision for the site is to be landscape-led and to draw from the character and landscape strengths of the site. A landscape strategy will be prepared and submitted as part of any planning application, in accordance with Policies JP-G1 (Landscape Character), JP-G2 (Green Infrastructure Network), JP-G3 (River Valleys and Waterways), JP-G6 (Urban Green Space) and JP-G7 (Trees and Woodland). This should include the following principles:

1. The creation of a green infrastructure corridor along the valley of the existing brook, providing an opportunity to support wildlife, SuDS and new recreational amenity for residents.

2. Providing new linear areas of green infrastructure for wildlife to connect ecological features with the broader green infrastructure network - connecting the site to adjacent farmlands and the M60 'Wildlife Corridor'.

3. The retention and enhancement of existing hedgerows and trees and particularly on the site boundaries.

4. The provision of street tree planting to create soft street scenes and break up the density of development, built form, and roofscape.

5. The provision of a strong landscape edge to the north-west site boundary (western part of the site), adjacent to the Green Belt.

6. The consideration of landscape buffers and boundary treatment to soften development edges on:

- The **western zone**, including:
  - The western edge where there is an interface with Simister Village, where tree planting and landscaping would be utilised to soften the development edge and to provide visual separation between the site and Simister Village.
  - The southern boundary, to provide a buffer between the site and the M60 motorway.
  - The interface between the site and properties on Heywood Old Road, which respects privacy and amenity.
- The **eastern zone**, including :
  - Planting on the northern, western and southern boundary, at the interface between the site and established residential areas.
  - Planting and landscaping on the eastern boundary to mitigate the impact of the development on land to the east.

7. The retention of key views, which will be enhanced and framed, including views to Heaton Park and Simister Village; as well as longer distance views to maintain the connection of the site to the wider landscape.

7.10.2 Open Space, Sport and Recreation

Open space and recreation will be integral to the health and well-being of new and existing residents. PfE Policy JP-P7 requires new development to provide new and/or improved existing facilities commensurate with the demand they would generate.

Detailed on-site provision in terms of quantity, quality and accessibility will be determined through planning applications and Bury and Rochdale's local standards and evidence base including Bury Council Open Space Assessment (2026) and Playing Pitch Strategy and Rochdale's relevant policies and supplementary planning documents. A range of types of open space and recreation should be provided on the site, informed by natural characteristics and supporting a suitable level of open space and formal recreation opportunities for residents.

Planning applications should explore the opportunity for the following open space and recreation provision across the site:

- **Natural Parkland and Trails** – exploring new habitat and amenity areas including extensions of existing hedgerows and trees, new copses for recreational community use, orchards linked to the LC, natural wildflower meadows.
- **Communal Gardens and Parks** - making use of retained landscape to create memorable spaces that are an integral part of the green corridors. This could include semi-private and communal spaces and informal spaces where people and can sit and relax.
- **Allotments and Community Growing** – to provide spaces to grow and produce food, generating interaction, skill sharing, and food cultivation.
- **Inclusive Play** - play should be distributed and located to ensure access for everyone, being located along key walking routes, travel nodes and destinations including the Community uses. Natural play should also be encouraged, including informal 'play on the way' on walks to school.
- **Formal Sports -** formal sports provision will be discussed and agreed with the Local Authorities (with reference to any Playing Pitch Strategy and Open Space Assessment) to ensure that adequate provision is made that reflect both the character and physical characteristics of the site, and the local need for different sports activities. Where there is a need, but the site doesn't lend itself to the ability to deliver pitches on site, off-site contributions may be sought instead. Opportunities for the dual use of facilities through new school provision should be explored, along with potential for improvements to sports facilities within the vicinity of the site.
- **Enhancing Blue Infrastructure** - enhancing the existing water features such as ponds and brooks, and providing a network of connected swales and natural attenuation features within the development areas.

It is anticipated that the long-term positive management of the open spaces within the site will be secured through both a Landscape and Habitat Management Plan and the establishment of a Management Company to maintain the play areas, open spaces and parks.

7.10.3 Green and Blue Infrastructure Framework

An indicative Green and Blue Infrastructure network reflecting the Open Space, Sport and Recreation Development principles is identified below:

1. **Communal Gardens and Viewing Points** - the masterplan framework provides a network of communal gardens and viewing areas throughout the site, designed to promote relaxation, social interaction, and enjoyment of the surrounding landscape. These could provide quieter spaces for reflection, while seating areas will be accessible and welcoming throughout the year.

2. **Inclusive Play** - play facilities will be designed to be inclusive, catering to a range of ages and abilities. These spaces will be integrated along walking routes, active travel connections, and adjacent to community facilities, including links to Heaton Park. Natural play elements and informal play opportunities will be encouraged throughout the site.



Figure 41: Indicative green infrastructure framework. Please note: some numbers relate to text on the following pages

3. **Community Growing Gardens** - shared growing spaces will support community interaction, skill sharing, and food cultivation. These areas, located near community uses, will encourage intergenerational engagement and provide opportunities for educational activities.

4. **Activity and Fitness** - the masterplan framework incorporates sports and activity spaces that complement the Site's natural features and topography. Facilities will provide for both formal and informal activity, including small kickabout areas and connections to wider green spaces such as Heaton Park to encourage walking, cycling, and outdoor exercise.

5. **Ecology** - the site will be managed to safeguard natural assets, enhance biodiversity, and support long-term ecological resilience while accommodating sustainable public use.

6. **Protect and Enhance Sensitive Habitats** - sensitive habitats will be protected from disturbance, with active management plans for declining species and seasonal buffers applied where necessary.

7. **Strengthen Landscape and Ecological Character** - all landscape interventions will follow ecological design principles, reinforcing existing character, increasing habitat diversity, and restoring degraded areas through native planting and natural regeneration.

8. **Expand Woodland and Hedgerow Networks** - There is an acceptance that hedgerows and trees will be lost in places to make way for development and construction operations (cut and fill to create development plateaus, etc). However, woodlands will be expanded and strengthened, and retained hedgerows will be restored, extended or replaced to form continuous wildlife corridors. New and replacement networks of hedgerows and tree corridors/groups will also be provided to compensate for lost hedgerows and trees.

9. **Improve Ecosystem Connectivity** - habitats will be linked internally and to the wider ecological network, enhancing species movement, genetic diversity, and ecological resilience.

10. **Enhance Existing Habitat**s - grasslands, woodlands, scrub, and species-rich hedgerows will be improved where possible. Neutral grasslands will be restored, vegetation structures diversified, and designated ecological sites maintained.

11. **Increase Biodiversity and Carbon Sequestration** - green spaces will be managed to maximise biodiversity and carbon storage. Pollinator-friendly planting, species-diverse grasslands, orchards, and wildflower areas will be promoted.

12. **Design for Ecology from the Outset** – ecological enhancements will be integrated throughout development, including bird boxes, bat roosts, and insect habitats, ensuring development phases enhance ecological networks.

13. **Connect Communities with Nature** - open spaces will support food growing, outdoor learning, and environmental stewardship, reconnecting people with natural processes and seasonal cycles.

14. **Enhance and Integrate Water Features** - ponds, and brooks will be restored and integrated with swales and SuDS to improve water management and aquatic habitats.

15. **Manage Human Access to Protect Wildlife** - footpaths, boardwalks, and natural boundaries will minimise habitat disturbance, supported by clear signage to protect sensitive zones while maintaining visual openness.



Figure 42: There are hedgerows across the site, with ponds and a large fishing lake evident on land to the west of Heywood Old Road.

7.11 Green Belt

To offset the impact of removing the site from the Green Belt, there is a need to identify and deliver compensatory improvements to the environmental quality and accessibility of the remaining Green Belt in the vicinity of the site. The full detail of Green Belt compensation would be proposed and agreed as part of a detailed planning application, in accordance with PfE Plan Policy JPA1.2 and Policy JP-G2 (Green Infrastructure Network).

7.12 Trees and Woodland

PfE Policy JP-G7 requires development which would result in the loss of existing trees, to replace them on the basis of two new trees for each tree lost, or other measures that would also result in a net enhancement in the character and quality of the treescape and biodiversity value in the local area, with a preference for on-site provision. An assessment of trees is expected to accompany all planning applications. Existing mature trees across the site have been considered as part of the masterplanning process and should be retained, as detailed planning applications for the site are prepared.

Given the topography of the site and the necessity to create development plateaus, a cut and fill strategy may result in tree and hedgerow loss Replacement, mitigation and compensation will be key to the delivery of the site, to ensure new tree and hedgerow corridors are provided. Further, engagement with City of Trees as part of the planning process is recommended.

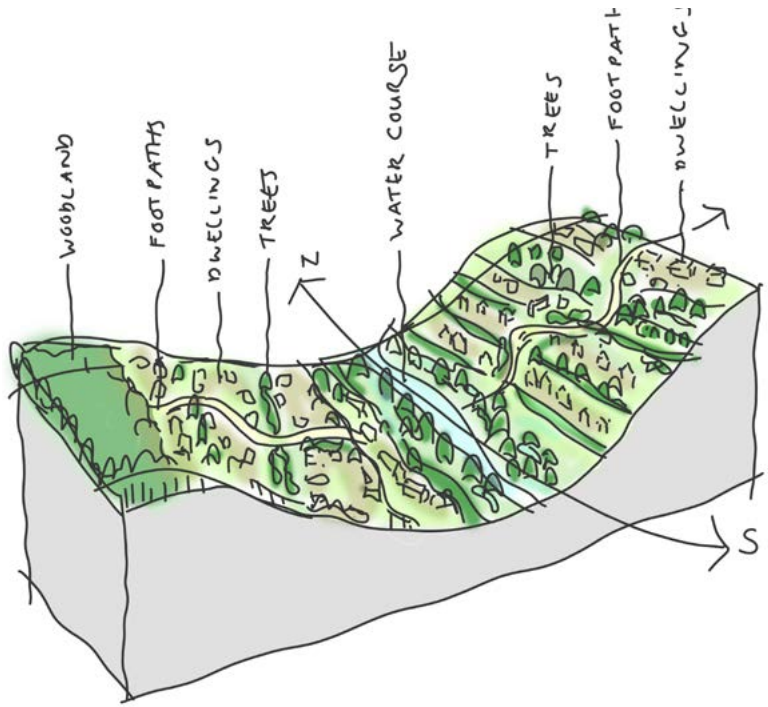


Figure 43: Concept sketch highlighting the integration of open space and natural features within the development

7.13 Digital Connectivity

PfE Policy JP-C2 requires development to commit to ensuring that all new development has full fibre to premises connections, unless technically infeasible and/or unviable, and incorporate multiple-ducting compliant with telecoms standards, to facilitate future-proof gigabit-capable network connections. It is expected that internet connections will be operational and immediately accessible to network providers when occupiers move into new properties. A digital connectivity statement is expected to accompany all planning applications.

7.14 Pollution Control

PfE policy JPA1.2 requires appropriate noise and air quality mitigation measures and high-quality landscaping along the M60 motorway corridors and local road network to be incorporated into development within the allocation. Details are expected to accompany all planning applications where required.

7.15 Landfill / Contamination

PfE Policy JPA1.2 requires necessary remediation measures in areas affected by contamination and previously worked for landfill purposes to be incorporated into development if required within the allocation. Details of remediation is expected to accompany all planning applications, where required.

7.16 Minerals

PfE Policy JPA1.2 requires development to consider the extraction of any viable mineral resources within Mineral Safeguarding Areas, in accordance with Policy 8 of the Greater Manchester Joint Minerals Development Plan (or any relevant policies in subsequent minerals plans). Details of minerals extraction is expected to accompany all planning applications, where required.



08

Phasing & Delivery

8. Phasing & Delivery

The site provides a major residential-led development opportunity that is allocated to deliver up to 1,550 new homes, supported by community and other essential infrastructure. This Development Framework provides a high-level strategy and key principles for the future delivery of the full JPA1.2 allocation, whilst retaining flexibility to allow for opportunities across the site.

Given the size, it will take several years for the site to be fully delivered and therefore it is important to develop a phasing and delivery strategy to bring it forward. This phasing and delivery strategy helps to shape the parameters within which future planning applications will be brought forward and provides a holistic and coordinated approach to the delivery of on and off-site physical and social infrastructure. Development is expected to come forward in a series of phases alongside necessary infrastructure provision, and a flexible approach is proposed in order to be responsive to opportunities.

To support the delivery of infrastructure across the site, an Infrastructure Phasing and Delivery Strategy ("IPDS") for the site will be prepared in accordance with the PfE Policy JPA1.2 and JP-D1.

This IPDS should be read alongside this Development Framework, noting that the IPDS is intended to be a "live document" that is continuously reviewed and updated as detailed plans, evidence, infrastructure costs and the potential of funding become available. This will tie in with the wider Business Plan for the Northern Gateway and Atom Valley aspirations.

Planning applications within the site will be required to demonstrate how proposed development would assist in the delivery of key infrastructure, without compromising or prejudicing the comprehensive development of the site. Proposals will need to demonstrate how the development of individual plots is consistent with SBDF, the IPDS and any other material considerations. Planning applications should not sterilise, frustrate or otherwise constrain the delivery of other parts of the site or the strategic infrastructure requirements.

All development plots will need to be sufficiently coordinated with appropriate infrastructure delivered at the correct time to support a sustainable and comprehensive development. Planning applications which fail to deliver or contribute towards the wider strategic infrastructure requirements will be resisted.

Planning applications will be expected to demonstrate how delivery of housing and other development, including social infrastructure within the site, will be coordinated with the delivery of transport and other physical infrastructure that is needed to support it.

The timely delivery of key green and blue infrastructure is important to the successful phasing of Simister Bowlee. Habitat and species protection, ecological connectivity and sensitive access management must be implemented in a coordinated manner, and within timescales to be agreed with the Councils to ensure that early construction phases do not adversely affect retained ecological features. Early establishment of strategic green corridors will safeguard ecological function while providing the foundation for Biodiversity Net Gain delivery and high-quality placemaking.

The recreation and sports provision should be delivered alongside development to ensure that both demand is met and communities have the opportunity to connect with this infrastructure as the site becomes occupied.

8.1 Key infrastructure Requirements

Development proposals must:

- Ensure they are acceptable in planning terms, such that they mitigate their on and off site impact in accordance with this Development Framework;
- Make an appropriate contribution to ensure the delivery of the strategic infrastructure identified by the Development Framework; and
- Ensure that the applicant's proposals will not prejudice the delivery of strategic infrastructure and development on third party land.

Infrastructure requirements to support Simister Bowlee have been categorised as being either strategic infrastructure (primary infrastructure needed to support the full delivery of Simister Bowlee) or local infrastructure (on-plot infrastructure delivered directly as a matter of course by each developer to meet the requirements of individual development plots).

Triggers for the strategic infrastructure will be determined through relevant and updated technical evidence. These triggers will also be included and refined in the IPDS and during pre-application discussions between applicants and the Council, ensuring proper determination of the appropriate triggers for the delivery of infrastructure.

The Simister Bowlee site is split into three broad 'zones', each of which will include multiple phases of development. These zones are shown in the Figure 45 and comprise:

- **Southern Zone** - 20 hectares delivering a mix of around 800 residential units;
- **Northern Zone** - 13 hectares, delivering a mix of around 550 residential units;
- **Eastern Zone** - 11 hectares, delivering a mix of around 200 residential units;

Development in all three Zones will be required to contribute to the strategic infrastructure requirements identified in Table 02. The precise capacity and quantum of housing development in each zone will be informed by technical assessment work and be determined as part of the planning application process.

* Table continued on next page

Infrastructure Element	Infrastructure Requirement	Comment
Highways and Public Transport	A new spine road connecting the northern and southern access points	The spine road will need to be operational at an appropriate time in the development programme to facilitate public transport and active travel through the site. The point at which this becomes necessary will be determined through a detailed Transport Assessment (TA) for the whole site and factored into planning applications as they come forward. When development commences (currently envisaged to commence in Southern Zone) the TA will indicate the capacity of the junction/network in the relevant locations. The TA will identify when the transport mitigation (including secondary access / egress) will be required.
	Active travel network including cycleways and pedestrian links	These will be required throughout the site and within individual zones. The primary active travel routes will run alongside the Spine Road, ensuring connectivity with all zones. Each development plot will need to demonstrate linkages to the site wide network (existing and new as appropriate).
	Bus Stop Provision	Triggers to be determined through a Transport Assessment for the site and in conjunction with TfGM.
	Off-site highway improvements	Triggers to be determined through a Transport Assessment for the site.
Social Infrastructure	Primary School Provision including new 2-form entry primary school	Triggers to be determined through Bury Council's Education Needs, Demand Assessment and evidence of need from Rochdale Council, and the wider IPDS.
	Secondary School Provision	Triggers to be determined through evidence of need for provision generated by the development, and the wider IPDS.
	Local Centre, including retail/ community/health facilities	Triggers to be determined through up-to-date health needs assessments, and the wider IPDS.

Infrastructure Element	Infrastructure Requirement	Comment
Environmental Infrastructure	Green infrastructure including public open spaces, sports facilities and playgrounds	Triggers to be determined by Bury Council Open Space Assessment (2026) and Playing Pitch Strategy and Rochdale's relevant policies and supplementary planning document, and the wider IPDS.
	Surface water attenuation and SuDS, integrated with areas of green infrastructure	Triggers to be determined through a drainage strategy for the site, and the wider IPDS.
	Measures to protect hydrology and water quality throughout the development	Triggers to be determined through a drainage strategy for the site, and the wider IPDS.
	Nature areas, ecological mitigation and biodiversity net gain	Triggers to be determined through an ecology strategy for the site, and the wider IPDS.

Table 02: Strategic Infrastructure Requirements (Site Wide)

8.2 Local Infrastructure (On-Site)

In addition to the strategic infrastructure requirements above, each development proposal coming forward in the site will be required to provide specific necessary infrastructure to allow it to come forward. Whilst there may be some bespoke requirements on some development plots, it is likely that the following will be required on each plot:

- Appropriate Access/egress arrangements into the development plots from Heywood Old Road or the proposed spine road
- Active travel access from Heywood Old Road (or the proposed spine road)
- Internal highways
- Internal walking and cycling routes
- Utilities
- Drainage (Suds and attenuation ponds)
- Drainage (foul water)
- Water Supply
- Power Supply
- Telecoms Supply
- Noise and Air Quality mitigation
- Green Infrastructure



Figure 44: Aerial view of Junction 18 and Simister Lane

8.3 Phasing

Phasing of development, including the amount of development capable of being delivered within each zone, will be influenced by the phasing of the spine road and the extent of available capacity within the surrounding highway network. This will need to be managed to ensure that highway and junction improvements are delivered outside of the site to accommodate additional movements.

The phasing of the spine road and quantum of development across the site will also need to relate to the provision of the two-form primary school on the site. As stated in Chapter 7, education provision is required within the development and the timing of delivery of the new primary school will be determined by the Council's Education Needs and Demand Assessment and the wider IPDS, to ensure that appropriate provision is in place and available.

Depending on the eventual location of the school and phasing of the site, it may be necessary to safeguard land for the education use so that it can come forward at the necessary point of development. Provision could be based on a one-form entry, expanding to a two form entry as demand increases.

All phases of development will be delivered in line with the comprehensive vision for the wider development, supporting the strategic requirements for infrastructure, particularly with regards to the link road, active travel, public transport, education provision and greenspace.

The precise capacity and quantum of housing development in each zone will be informed by technical assessment work and be determined as part of the planning application process.

8.3.1 Southern Zone

Key features in this zone include:

- 20 hectares delivering a mix of around 800 residential units;
- Affordable housing in accordance with adopted local planning policy requirements;
- Primary access taken from Heywood Old Road at the southern extent of the site;
- A new access onto Heywood Old Road at the southern extent of the Southern Zone designed to provide for movement through the zone and providing connectivity to the Northern Zone;
- Off-site highway and junction improvements;
- Potential location of a new 2-form entry primary school;
- Green open space and recreation provision, including potential new sports pitches, neighbourhood play spaces and new linear greenways linked to active travel routes throughout the zone, connecting into the other two zones and beyond.

8.3.2 Northern Zone

The Northern Zone will provide a key gateway into the site and could be delivered in sub-phases. The key features in this zone include:

- 13 hectares, delivering a mix of around 550 residential units;
- Affordable housing in accordance with adopted local planning policy requirements;
- Primary access taken from Heywood Old Road at the northern extent;
- A new gateway junction at Heywood Old Road designed to provide for movement throughout the whole allocation, providing connectivity to later phases, southern and eastern zones within the development;
- Off-site highway and junction improvements;
- Preferred location of a new 2-form entry primary school;
- A Local Centre, with community, healthcare and retail facilities;
- Specialist accommodation for elderly living;
- Green open space and recreation provision, including potential new sports pitches, neighbourhood play spaces and new linear greenways linked to active travel routes throughout the zone, connecting into the other two zones and beyond.

It is envisaged that this zone will accommodate a mix of homes, as well as the essential social and community infrastructure, including the preferred location for a new two form primary school and the Local Centre.

Development will be programmed to allow the completion of the spine road through this zone. The full spine road should be delivered as soon as practicable, in order to provide the necessary resilience and permeability throughout the site. This is not only critical to facilitate the level of development proposed, but also essential to facilitate public transport connectivity and active travel movement within and around the site.

8.3.3 Eastern Zone

Key features in this zone include:

- 11 hectares, delivering a mix of around 200 residential units;
- Affordable housing in accordance with adopted local planning policy requirements;
- Access taken from Heywood Old Road;
- Off-site highway and junction improvements;
- Green open space and recreation provision, including potential new sports pitches, neighbourhood play spaces and new linear greenways linked to active travel routes throughout the zone, connecting into the other two zones and beyond.
- The Eastern Zone could be brought forward as a standalone site. This part of the site sits entirely within Rochdale, but the site will need to contribute to the strategic infrastructure requirements of the whole allocation, including the education provision.



Figure 45: Indicative Phasing Plan

8.4 Summary

The approach to phasing set out in this SBDF is not intended at this stage to be chronological. Instead, the phasing and delivery approach outlined above reflects a natural and logical way the site will come forward physically given the spatial principles established by the SBDF and infrastructure integrated within it, coupled with the aspiration to deliver the site successfully.

Due to the scale and nature of the proposed uses and the timescales within which it is anticipated to be delivered, the SBDF needs to be robust as well as flexible. The SBDF provides suitable controls and principles to guide future proposals and to manage design qualities, whilst being able to adapt to changing market conditions, site constraints, and opportunities to accelerate delivery. The phasing and delivery strategy outlined does not restrict the potential for zones to be accelerated where opportunities arise, or where infrastructure needs to change or allow zones to be advanced earlier than currently envisaged.

The phased delivery of Simister Bowlee will be kept under review and will be informed by up-to-date evidence prepared to support future planning applications and the IPDS. Triggers for the strategic infrastructure will be determined through relevant and updated technical evidence.

The Councils will work with all partners and stakeholders to bring forward the delivery of strategic infrastructure and development in a coordinated manner that provides significant benefits to new and existing residents. This will include the Councils (or other public sector bodies) potentially using their statutory land assembly powers (including compulsory purchase powers) to enable and facilitate the delivery of this major opportunity.

8.4.1 Funding

A range of funding and delivery mechanisms will be required, including:

- **Planning conditions and Section 106 Agreements to secure on-site infrastructure:** to secure the delivery of on-site infrastructure required to deliver development.
- **Developer contributions secured via Section 106 and Section 278 Agreements to support off-site infrastructure:** Developer contributions and/or delivery of infrastructure off-site will be secured to assist in mitigating the impact of the development (or relevant phase of the development). In line with the CIL Regulations, contributions will only be sought where they are necessary to make the development applied for acceptable in planning terms and will be fairly and reasonably related in scale to the development.
- **Public sector funding:** Where appropriate, sources of public sector funding will be investigated to assist or accelerate the delivery of strategic infrastructure and development.

8.4.2 Equalisation

Equalisation is a mechanism to ensure the fair and proportionate distribution of the necessary costs of the strategic infrastructure, regardless of which specific parcel of land is used for what purpose. This approach seeks to avoid the costs falling disproportionately on early phases of development or being pushed back to later phases, which would be to the detriment of the comprehensive delivery of the site.

An equalisation approach will be followed for the site. This means that all development proposals within the site must contribute towards that infrastructure in a fair and proportionate manner.

Details regarding the mechanism for identifying fair and proportionate contributions will evolve through the IPDS and any associated documentation to support delivery of the site.

In line with the Planning Practice Guidance, land values within the site should reflect the requirement to fund strategic and plot-specific infrastructure and mitigation.

The IPDS will continue to be updated to reflect the costs of wider infrastructure requirements of the site as they are understood and will expand upon the approach to equalisation through the contributions to be sought.

Pre-application discussions with the councils will refine local infrastructure requirements, which will be additional to those site-wide strategic infrastructure requirements that all developments should contribute towards.



09

Sustainability Strategy

9. Sustainability Strategy

Greater Manchester's ambition is to become a carbon neutral city region by 2038. This ambition is supported by Bury and Rochdale Councils through a declaration of a climate emergency. Achieving this goal will reduce the need for buildings and homes to be retrofitted in future to achieve carbon neutral goals set by Greater Manchester and the UK.

9.1 Delivering Low Carbon, Sustainable Homes

Strategic Objective 7 of PfE 'playing our part in ensuring that Greater Manchester is a more resilient and carbon neutral city region' includes two specific themes of relevance to this Chapter which are to:



1. Promote carbon neutrality of new development by 2028; and



2. Improve energy efficiency and the generation of renewable and low carbon energy

The Simister Bowlee site provides an opportunity to support Bury, Rochdale and Greater Manchester's commitment to net zero through the implementation of the policies within PfE and the delivery of low zero carbon and highly sustainable homes.

This chapter focuses on the expectations and likely benefits from the Simister Bowlee site with respect to carbon, energy, resource efficiency and climate resilience which, collectively, would make a significant contribution to climate change mitigation and address the impacts of climate change. The specific policies within PfE that are relevant to this section and are considered in turn below are:

- Policy JP-S1: Sustainable Development
- Policy JP-S2: Carbon and Energy
- Policy JP-S3: Heat and Energy Networks
- Policy JP-S4: Flood Risk and the Water Environment
- Policy JP-S6: Resource Efficiency



9.2 Promoting carbon neutrality of new development by 2028

9.2.1 Carbon and Energy

Policy JP-S2 includes an expectation that new development will be net zero in a phased approach, unless it can be demonstrated that this is not practicable or financially viable:

- From adoption (2024) – regulated operational carbon emissions: When the amount of carbon emissions associated with the building's operational energy on an annual basis is zero or negative. A net zero carbon building is highly energy efficient and powered from on-site and / or off-site renewable energy sources, with any remaining carbon balance offset.

- From 2028 – the above plus all emissions 'in construction': When the amount of carbon emissions associated with a building's materials and construction stages up to practical completion is zero or negative, through the use of offsets. For clarity, construction carbon is defined as life stages A1-A5.

Policy JP-S2 takes the definition of Net Zero Carbon from the UK Green Building Council (UKGBC) Net Zero Carbon Buildings Framework (2019).

The UKGBC Framework is due to be superseded by the emerging UK Net Zero Carbon Building Standard (UK Net Zero Carbon Building Standard). Implications of this change will need to be considered once the UKNZCBS is launched.

The GMCA has published guidance on the application of its approach to net zero. These are considered in the following pages.

9.2.2 Net Zero in Operation

The GMCA Net Zero Design Guidance states that for Applicants to comply with Policies JP-S2 and JP-S3, all new buildings should be designed and built to be Net Zero Carbon in operation in compliance with the following where practical and viable:

- Fabric efficiency
  - Space heating demand of ≤20kWh/m2/year for houses
  - Space heating demand of ≤15kWh/m2/year for flats
- Energy use and carbon emissions
  - BREEAM 'Excellent' standard (or equivalent) for the 'Ene 01 –reduction of energy use and carbon emissions' credit issue is achieved, rising to BREEAM 'Outstanding 'equivalent from 2028.
- Energy Use Intensity (EUI)
  - EUI of ≤35kWh/m2/year for TANZ homes only
  - EUI to be calculated using appropriate methodology e.g. CIBSE TM54
- No fossil fuels and low carbon heat
  - The energy strategy will be all-electric to ensure that energy demand is met through the increasingly decarbonising electricity grid.

  - It is expected that heat pumps will be used to deliver the space heating and cooling demand.

- On-site renewable energy generation and energy balance
  - Roof mounted solar photovoltaics will be prioritised.
  - Residential development should aim to provide PV equivalent to 40% footprint area.
- Offsetting (as last resort)
  - To be used where practical and viable via a fund which will be developed by Bury and Rochdale Councils.
  - It is not expected that emissions associated with unregulated energy will be offset.

Additional requirements listed within the GMCA Net Zero Design Guidance include:

- Upfront embodied carbon reporting (See Net Zero in Construction below)
- Overheating risk reduction
  - Residential uses should avoid mechanical cooling
  - Non-residential uses should pass CIBSE TM52
- Reporting energy consumption in-use

As the GMCA Net Zero Design Guidance is not incorporated into PfE, the targets included are aspirational but will be used to guide the design and construction of new developments. The exception is the space heating demand targets, which are included within Policy JP-S1 as best practice thresholds and will be applied where practical and viable.

9.2.3 Net Zero in Construction

The GMCA Net Zero Design Guidance includes aspirational targets for residential development as follows:

- 500kgCO2/m2 for homes
- 600kgCO2/m2 for flats

No targets are provided for non-residential development.

Reductions in construction carbon will focus on material efficiency (e.g. 'use less') in the first instance.

9.2.4 Carbon Offsetting

Where a development cannot achieve net zero requirements or targets, carbon offsetting will be considered; this involves a financial contribution to mitigate or compensate for the effects of unavoidable carbon emissions by investing in an off-site scheme which reduces or removes greenhouse gases elsewhere, such as tree planting or renewable energy.

In collaboration with the GMCA, Bury Council is developing a Carbon Offset Fund to enable applicants to contribute to and achieve Net Zero Carbon where practical and viable.

9.3 Improving energy efficiency and the generation of renewable and low carbon energy

9.3.1 Heat and Energy Networks

Simister Bowlee falls within the Northern Gateway Heat and Energy Network Opportunity Zone. As part of any planning applications, a Low Carbon Heat Appraisal will be prepared setting out a comparative analysis of feasible heating systems, and proposals for a heating strategy which is practical and delivers carbon savings over the course of its operation. If the Applicant can demonstrate that an alternative energy strategy will deliver the same or greater carbon savings and / or financial savings or such network connection would not be practicable or financially viable, then this will be considered.

Opportunities for smart energy networks should also be considered, including:

- Energy demand and generation balance
- Energy storage
- Microgrid(s), and
- Electric vehicle charging strategy.

9.3.2 Resource Efficiency

Circular economy is a key part of GM's ambition to be a carbon neutral and leading green city region by 2038, and Northern Gateway will have a role in supporting this.

PfE Policy JP-S6 (Resource Efficiency) requires development to use sustainable design and construction techniques to reduce carbon emissions, adapt and future proof to the impact of climate change, reduce and recycle waste and minimise water use.

It is expected that circular economy measures implemented in the development will include, but are not limited to:

- Material efficiency, minimising the quantity of materials used in construction
- Use of recycled materials and materials with a high recycled content
- Use of materials which can be repurposed or recycled at end of life
- Resource (energy and water) efficiency measures during construction and operation, and
- Reduction of waste generated during construction and operation, and diversion of residual waste from landfill

9.3.3 Climate Resilience

GM will experience changes to the climate in the future, including:

- Increased annual temperatures
- Increased winter rainfall, and
- Decreased summer rainfall.

Impacts associated with these changes to climate and measures to mitigate them are set out within PfE Policy JP-S4. Development will need to demonstrate how climate adaptability and resilience measures have been incorporated through design measures which are appropriate for Simister Bowlee. Design measures expected to be implemented on site include:

- Reducing overheating risk through passive measures in the first instance, using active cooling where necessary.
- Reducing flood risk through Sustainable Drainage Systems (SuDS), without significantly increasing embodied carbon emissions.
- Incorporating green and blue infrastructure to mitigate overheating, flood risk, and contribute to biodiversity.
- Minimising water use during operation through reducing water demand and incorporating rainwater or greywater harvesting, and
- Appropriate landscaping strategy which suits current and future climate scenarios and doesn't rely on mechanical irrigation.

9.3.4 Environmental Accreditation

PfE Policy JP-S2 requires any non-residential development should achieve a minimum of BREEAM 'Excellent' standard (or equivalent) for the 'Ene 01 – reduction of energy use and carbon emissions' credit issue, rising to BREEAM 'Outstanding' equivalent from 2028.

BREEAM provides a holistic approach to demonstrating sustainability, including categories in Energy, Water, Materials, Waste, and Pollution. The assessment process provides a robust approach to carbon and energy, resource efficiency, and climate resilience.

Applicants are therefore encouraged to pursue certification under BREEAM for non-residential uses over 1,000sqm.

Where feasible and viable, additional accreditation is encouraged to demonstrate the sustainability credentials of the site.

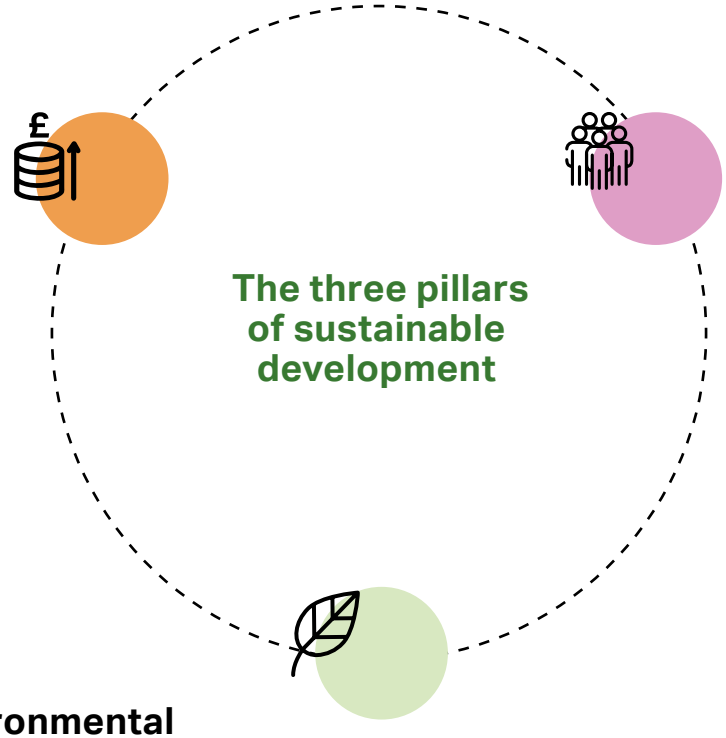


10

The Benefits

10. The Benefits

The proposals will bring a range of benefits that will embrace the three pillars of sustainable development:



Economic

The development of the site will boost the Greater Manchester economy and support the world class employment opportunity at JPA1.1, by delivering the type and quality of homes that will underpin long term growth and retain skills in the north of the conurbation.

Social

Delivering inclusive development that provides the types of market and affordable homes to meet local needs, alongside community infrastructure that will improve access to amenities and support the growth of the local population.

Environmental

Ensuring the development will maximise opportunities for biodiversity enhancement, creating a comprehensive green infrastructure network and ensuring that the objective of net zero carbon for both the development and the Greater Manchester area is integral to the design from the outset.

10.1 Economic Benefits

Due to its scale and importance, the development of the site would have significant economic benefits, from its construction, occupation and in the catalytic impact it would have within Bury and Rochdale, Greater Manchester and the wider region. The key economic benefits of the scheme include:



During Construction

- 1,815 'person years' of construction employment created, equating to an average of 115 FTE on and off-site construction jobs per year assuming an indicative 16 year build stage.
- 120 net additional FTE positions supported each year across the North West, via indirect and induced employment effects
- £146 million net additional GVA contribution to the North West's economy over the 16 year construction build period; and
- The potential to support approximately 45 construction apprenticeships in their entirety (with each being 3 years long).

During the Occupation of the Development

- 80 gross FTE jobs supported on the site once it is complete and fully operational.
- 1,680 working age, economically active and employed residents would occupy the new homes, generating a combined additional gross income of up to £53 million per annum, which would support an additional 215 retail and leisure-related employee jobs in the local area.
- An additional £4.65 million in collective Council Tax payments and £50,000 in business rate revenue per annum, for collection by Bury and Rochdale Borough Councils, to support local services across the Councils.

Wider Catalytic Effects

- Underpinning employment growth across the north of Greater Manchester by providing the type, quality and spatial distribution of homes in the region that will allow it to capitalise on its key strengths, growth potential and emerging industries in the Atom Valley MDZ.
- Providing the quality of housing and community infrastructure that will underpin the retention of skilled workers and support jobs in the north east growth corridor, and particularly at the world class employment destination at JPA1.1.

10.2 Social Benefits

The delivery of the site will have clear social benefits for existing and future residents, in terms of providing better choice, improving access to amenities and meeting a variety of identified housing needs. The key social benefits include:



- Delivering high quality market homes, with a range of types and tenures, to meet the needs of existing and future employees.
- Delivering affordable homes in accordance with local policy, to help meet housing needs.
- Delivering a new primary school; and other community infrastructure, including a Local Centre with flexible uses, new retail and community uses, active travel infrastructure and public open spaces. Collectively this benefit and support existing and future populations.
- Delivering new and accessible multifunctional open spaces, amenity spaces and green infrastructure to benefit existing and future residents and to improve connectivity surrounding communities and encourage healthy and active lifestyles.
- Providing a highly permeable settlement layout with continuous routes throughout the site that seeks to improve connections to, and between, existing and future communities.
- The provision of improved bus services and connectivity to key destinations, including the JPA1.1 employment site and Manchester.

10.3 Environmental Benefits

Development of the site will support the environmental pillar of sustainability through the application of key PfE policies in relation to sustainable development, carbon and energy efficiency, green infrastructure, landscape, biodiversity and heritage.

The development of the site has the potential to significantly uplift the biodiversity, accessibility and overall enjoyment and environmental value of the site; as well as embedding climate resilience and energy efficiency in the fabric of design. Key environmental benefits include:



- Seeking to achieve net zero carbon emission buildings in construction and operation, in line with the policy requirements of PfE Policies JP-S1 and JP-S2.
- Delivering a development which is adaptable and resilient to climate change and limits environmental impacts to biodiversity, building occupants, and the local community.
- Delivering an uplift in biodiversity which would, as a minimum, meet the 10% net gain requirement.
- The provision of multi-functional green infrastructure and open space that will benefit existing residents and create new green corridors through the site.
- The protection and enhancement of existing features of the site that add value, including mature trees, hedgerows and woodland.



Figure 46: Views across to the Manchester city skyline from the site



11

Social Value Strategy

11. Social Value Strategy

Social value is about the positive impacts that can be delivered in society and is measured by the actions taken to improve community benefit. There are notable inequalities within Bury's and Rochdale's communities around levels of deprivation; health and life expectancy; employment; and educational attainment. Requirements for social value in planning have the power to unlock additional community benefit from the development which can contribute towards addressing some of the deep-rooted inequality issues.

11.1 Social Value

To help to address issues around inequalities and ensure local communities benefit, it will be necessary for new development on the site to take all practicable measures to maximise its wider social value and its contribution to social inclusion. Opportunities to deliver social value through new development arise in both the construction and operational phases.

A key aspect of this is economic inclusion and ensuring that local residents and existing communities have the opportunity to share in the benefits of development and economic growth. For example, new development that includes effective initiatives around economic inclusion could help residents into employment and/or training. Such initiatives would help to tackle deprivation by raising people out of poverty and reducing inequalities, whilst benefiting the development directly through improved access to a larger, healthier and more highly skilled labour supply.

Developers will be expected to produce a Social Value Strategy which sets out how social value and social inclusion will be maximised, securing the implementation of suggested measures and enabling the public to understand the positive impact that new development will have on their neighbourhood and community.

The Council will positively engage in the production and implementation of developer-led Social Value Strategies, but the involvement of other stakeholders, including local residents, is also strongly encouraged in order to maximise their impact and the acceptance of new development.

Bury and Rochdale Councils approved the implementation of a Northern Gateway Social Value Strategy (NGSVS) and accompanying Delivery Plan in November 2025. The NGSVS aims to align the social value priorities of public sector organisations involved in the development and / or delivery of Northern Gateway and ensure that any social value outputs create positive social, environmental and economic impacts for the communities within Bury and Rochdale. The Councils are committed to working with external bodies involved in activity specific to the site and, as such, liaison with the Councils should take place during the production of developer-led Social Value Strategies to ensure alignment with wider social value activity across Northern Gateway.



12

Monitoring and Review

12. Monitoring and Review

This draft SBDF provides a clear vision for the delivery of the Simister and Bowlee (Northern Gateway) site. However, if circumstances change and have implications for the vision, design and development principles set out in this document, then a review of this document will be appropriate.

The scope and content of any review would be agreed between the councils and the updated SBDF SPD would be subject to a proportionate statutory and/or public/ stakeholder consultation prior to being finalised.

Bury Council
ROCHDALE BOROUGH COUNCIL

Agenda Item 10

Classification: Open	Decision Type: Key

Report to:	Overview and Scrutiny (10th February) and Cabinet (11th February)	**Date:** 11 February 2026
Subject:	Draft Elton Reservoir Development Framework	
Report of	Leader and Cabinet Member for Strategic Growth	

Summary

1. The draft Elton Reservoir Development Framework (ERDF) sets out the masterplan and phasing strategy for the Elton Reservoir site. This is Bury's largest residential site allocated through the Places for Everyone Joint Plan (PfE), which was adopted in March 2024.

2. A key requirement of PfE Policy JPA7 is that any proposals within the Elton Reservoir allocation must be in accordance with a comprehensive masterplan that has been approved by the Local Planning Authority and it shall include a clear phasing strategy as part of an integrated approach to the delivery of infrastructure.

3. The draft ERDF establishes the key principles for the development of the site and establishes a framework against which future planning applications on the site will be considered. It sets out high level design principles and an approach to the delivery and phasing of the necessary supporting infrastructure. To give the ERDF appropriate planning weight in decision-making process, it is proposed that it is formally adopted as a Supplementary Planning Document (SPD).

4. Overview and Scrutiny Members are asked to note the content of the Elton Reservoir Development Framework and provide feedback.

5. Cabinet Members are asked to approve the draft ERDF for at least a 6-week period of consultation to establish stakeholder views on its content. Following consultation, all representations received will be fully considered and changes made, where appropriate, before the ERDF is brought back to Cabinet for approval to formally adopt it as an SPD.

Recommendation(s)

6. It is recommended that Overview and Scrutiny:

   i. Note the content of the Elton Reservoir Development Framework Supplementary Planning Document (Appendix 1);

ii. Provide feedback on the content of the Elton Reservoir Development Framework Supplementary Planning Document (Appendix 1).

7. It is recommended that Cabinet:

i. Approves the draft Elton Reservoir Development Framework Supplementary Planning Document (Appendix 1) as the basis for public consultation for six-week period commencing on 13th February 2026.

ii. Delegates power to the Executive Director of Place to make minor non-material editorial amendments to the draft Elton Reservoir Development Framework Supplementary Planning Document before consultation commences.

Reasons for recommendation(s)

8. To enable stakeholders to have the opportunity to submit comments on the draft Elton Reservoir Development Framework and to comply with the statutory requirements for consultation.

Alternative options considered and rejected

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

Report Author and Contact Details:

Name: Cris Logue
Position: Assistant Director (Strategy, Planning and Regulation
Department: Place
E-mail: c.logue@bury.gov.uk

Background

10. The Places for Everyone Plan (PfE) is a joint development plan document of nine of the ten Greater Manchester authorities (excluding Stockport MBC) which was adopted on 21st March 2024.

11. It is a long-term plan for jobs, new homes and sustainable growth which allocates large strategic sites for employment and housing. This includes the residential allocation at Elton Reservoir (PfE Policy JPA7). The site is Bury's largest residential allocation and offers the opportunity to create a vibrant, sustainable new community that delivers much-needed homes in the Borough.

12. Elton Reservoir will deliver:

- 3,500 new homes
- Affordable housing in line with policy (currently 25%, around 875 affordable homes)
- Specialist and older persons accommodation
- New two-form entry primary school with potential for it to grow to a three-form entry should it be required.
- Three local centres containing new community, retail and health facilities to serve the needs of the new residents (and existing residents)
- New Metrolink stop and public transport hub
- New link road through the site to provide access, enable active travel movement and provide resilience on the existing highway network
- Off-site highway works to mitigate for the development
- Active Travel network including cycleways and pedestrian links
- Green infrastructure including nature park, heritage park, public open spaces, sports facilities and playgrounds
- Ecological mitigation and biodiversity net gain
- Surface water attenuation, SuDS and measures to protect hydrology and water quality

Elton Reservoir Development Framework (ERDF)

13. Following its adoption on 21 March 2024, the Places for Everyone Joint Development Plan (PfE) became a key part of Bury's statutory development plan alongside the saved policies of the Unitary Development Plan (UDP) and the Greater Manchester Joint Minerals and Waste Plans.

14. A key requirement of PfE Policy JPA7 is that any proposals within the Elton Reservoir allocation must be in accordance with a comprehensive masterplan that has been approved by the Local Planning Authority and it shall include a clear phasing strategy as part of an integrated approach to the delivery of infrastructure to support the scale of the whole development in line with PfE Policy JP-D1 'Infrastructure Implementation'.

15. The masterplan requirement is a critical stage in providing a bridge between the allocation of the site in PfE and any subsequent planning consent.

16. Supplementary planning documents (SPDs) build upon and provide more detailed advice or guidance on policies in an adopted development plan. They can be used to provide further guidance for development on specific sites, or on particular issues.

17. As they do not form part of the development plan, SPDs cannot introduce new planning policies into the development plan. However, they are a material

consideration in the decision-making process when determining particular planning applications.

18. The ERDF has been prepared by Bury Council with technical input from Peel Land and Property as the main site promoter.

ERDF Role and Objectives

19. Once adopted, the ERDF will establish the key principles for the development of the site and establish a framework against which future specific planning applications on the site will be considered. It will also help Bury Council to ensure that the ambitions for the site are realised and the benefits to the community are maximised.

20. The draft ERDF will:
    - Establish an overall vision for the place being created;
    - Identify the likely extent of development and location of key infrastructure and facilities;
    - Set out the key design and delivery principles with which future proposals for the site will be expected to comply; and
    - Provide certainty to the local community and future developers on the expectations for development across the area, whilst maintaining adequate flexibility to response to further evidence and changing needs.

Scope and Content of the draft ERDF

21. Chapters 1 and 2 set out the background of the site, the role and purpose of the ERDF and the strategic planning context. These chapters include a brief description of the site as well as setting out the key local and national planning policies which any development needs to take into account. The strategic planning context also sets out how this site aligns with other corporate strategies.

22. Chapter 3 provides a detailed analysis of the site, setting out some of the key characteristics, opportunities and constraints. This section includes matters such as transport, ecology, landscape, heritage and social and community infrastructure. It identifies what is currently there as well as opportunities for dealing with any constraints and potential improvements that the development could deliver.

23. Chapter 4 sets out the vision and objectives for the site. The over-arching aim is to create a thriving, sustainable new community within Bury and this aim is supported by seven key strategic objectives, which will guide the development and ensure it delivers meaningful, lasting benefits.

24. Design is addressed in Chapter 5 of the ERDF and sets out the design principles for the site. Particularly notable given the location and nature of the

site is how the design responds to significant green corridor which remains within the Green Belt and enhancement of the existing assets of Elton and Withins Reservoir and the Manchester, Bolton and Bury Canal.

25. Chapter 6 brings together the key aspects of the preceding chapters to produce a masterplan for the site. In doing this it sets out how the masterplan proposals apply the vision, objectives and design principles to create the essential elements of a high quality and highly sustainable new place. Key elements of the masterplan include the new link road, Metrolink stop and public transport hub, the location of the three local centres and primary school and the strategic green corridor.

26. Chapter 7 sets out a number of development principles for the site. These will inform the parameters for the development of the Elton Reservoir site and should be considered as part of any future planning applications within the site. The principles are wide ranging and includes matters such as design, highways and access, public transport, active travel, the type of housing (including affordable housing), open space, education provision, green and blue infrastructure, flood risk and drainage.

27. Chapter 8 deals with phasing, infrastructure and delivery. This chapter sets out they key issues in terms of phasing and infrastructure and how they should be considered in the delivery of the site. An Infrastructure, Phasing and Delivery Strategy will be produced alongside the ERDF. However, as this strategy is likely to be updated regularly to reflect new information and available funding, it is proposed that is not included within the ERDF but is instead a separate 'living' document produced through collaboration between Bury Council and key stakeholders. The Council will work with all partners to bring forward the strategic infrastructure and this may include the Council (or other public sector bodies potentially using its statutory land assembly powers to enable or facilitate the delivery of this major opportunity.

28. Chapter 9 addresses the importance of embedding an approach to sustainable development in delivering the site. This is necessary to meet Greater Manchester's ambition to become a carbon neutral city region by 2038, supported by the declaration of a climate emergency.

29. Chapter 10 and 11 set out the key benefits that are expected to be realised from the development. Chapter 10 deals with the general economic, social and environment benefits, whilst Chapter 11 has a specific focus on social value.

30. Chapter 12 commits to a review of the ERDF should there be a change in circumstances which would have implications for the guidance provided in the document.

Consultation and Adoption

31. In preparing this draft ERDF, there has been early engagement with a range of stakeholders. This has been crucial in gaining valuable information about the long-term aspirations for the site and the infrastructure required to deliver the full potential of the site. Dialogue will continue through the consultation process to help shape any revisions to the ERDF before it is brought back to Cabinet for formal approval/adoption, once the consultation process has concluded.

32. As an SPD, the ERDF 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 a Strategic Environmental Assessment or Habitat Regulation Assessment is required. The outcomes of the screening opinion will be published alongside the draft ERDF.
- Made available for public consultation for a 4-week minimum period.
- Made available for inspection, at a Council's principle office and at other places within its area as the Local Planning Authority consider appropriate, during normal business hours.
- Made available as an online copy.

33. The ERDF will be prepared in accordance with the statutory framework and the regulations cited above. The Council's website will be used as the main point of contact for the formal consultation. The ERDF online consultation will be promoted via social media (Facebook and X) to raise awareness of the proposals and to issue reminders of the consultation closing date. These should direct residents to the formal consultation website.

34. Printed copies of the ERDF will also be placed in key public buildings (Town Hall and libraries) to allow members of the public to participate in the consultation process.

35. Publicity materials including posters will be located at key locations to signpost residents to the on-line information or to view proposals in person.

36. Direct contact via letters or email will be made with consultees registered on the Consultation Database (around 2,500).

37. Residents and businesses will also be able to view and discuss the proposals with Council officers at drop-in sessions being held on:

- Tuesday 24th February – Radcliffe Market - 4-8pm
- Wednesday 25th February – Elton High School - 4-8pm
- Thursday 26th February – Parrenthorn High School - 4-8pm

Council land interests

38. Members should note that, within the site allocation, the Council holds freehold ownership of two parcels of land that are earmarked for the access/egress routes from the site. Any future use of this land as part of the development will require a separate Cabinet report.

Next steps

39 It is proposed that consultation on the draft ERDF will start on 13 February and run until 27 March 2026 (6 weeks in total).

40 This would allow for consideration of comments received and for any amendments to the ERDF to be made before the final version is taken back to Cabinet for formal approval/adoption of the ERDF in summer 2026.

Links with the Corporate Priorities:

Please summarise how this links to the Let's Do It Strategy.

41 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 'Lets 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:

42 An EIA analysis has identified potential impacts across some characteristics which will require consideration of mitigations as the development progresses. The EIA will require update and revision as this development progresses

There are no outstanding equalities concerns at this stage

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*** *(contact c.m.wilkinson@bury.gov.uk for advice)*

43. Environmental impacts and concerns will be assessed and monitored as project delivery commences and will be in-line with existing Council policies. The Elton Reservoir Development Framework will seek to meet policy requirements, including physical, social and environmental impacts including biodiversity net gain.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
Stakeholders to not engage in the consultation on the draft Supplementary Planning Document.	The draft 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 the Council's 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:

To be completed by the Council's Monitoring Officer.

44 The draft SPD has been prepared in accordance with the Planning and Compulsory Purchase Act 2004 and the Town and Country Planning (Local Planning) (England) Regulations 2012.

45 The recommendations within the report to publish the draft SPD for consultation prior to consideration of responses and potential future adoption by the Cabinet is within the legal powers of the Council.

Financial Implications:

46 There are no financial implications arising directly from the drafting and adoption of the Elton Reservoir Development Framework. The Framework has been developed by Planning Services staff funded from existing approved budget allocations. Any costs relating to the consultation process will also be covered within existing approved budget allocations.

Appendices:

Appendix 1 – Elton Reservoir Development Framework Consultation Draft Supplementary Planning Document

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
SPD	Supplementary Planning Document
PfE	Places for Everyone Joint Development Plan
ERDF	Elton Reservoir Development Framework

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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	Draft Elton Reservoir Development Framework Supplementary Planning Document
Lead Officer (SRO or Assistant Director/Director)	Cris Logue
Department/Team	Business, Growth and Infrastructure
Proposed Implementation Date	24th October 2025
Author of the EqIA	Fran Smith
Date of the EqIA	16th October 2025

1.1 What is the main purpose of the proposed policy/project/decision and intended outcomes?

Draft Elton Reservoir Development Framework (ERDF) Supplementary Planning Document (SPD) supports Policy JPA7 of the Places for Everyone Joint Plan (PfE) which was adopted in March 2024.

The draft ERDF establishes the key principles for the development of the Elton Reservoir site and establishes a framework against which future planning applications on the site will be considered, sets out high level design principles and an appro ach to the delivery and phasing of infrastructure. In order to give the Framework additional planning weight in decision making, it is proposed that it is adopted as a Supplementary Planning Document (SPD).

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The ERDF provides a clear vision for the delivery of the Elton Reservoir site. However, if circumstances change and have implications for the vision, design and development principles set out in the ERDF, then a review of this document will be appropriate.

It is proposed that the draft SPD is subject to at least a six-week period of consultation in order to establish stakeholder views on its content.

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 Elton Reservoir SPD will not affect any employees based on a protected characteristic(s) they have. Staff will be guided in their work, in line with national guidance and the council's strategic aims, enabling them to provide the public with the best possible level of service.

Community/Residents: **Yes.** A key part of the PfE, including the Elton Reservoir site, 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.

Third parties such as suppliers, providers and voluntary organisations: **Yes** – PfE and the Elton Reservoir SPD will provide careful and detailed advice towards ensuring high quality development within the Elton Reservoir allocation.

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:

PfE has been subject to an Integrated Assessment (which included an Equality Impact Assessment) and this can be viewed at mdc8-appendix-a-eqia-2023.pdf

Data:

Places for Everyone has already been through the Equality Impacts Assessment (EqIA) process at the relevant stages of development. The SPD expands on policies within Places for Everyone which has already been through the Sustainability Appraisal (SA) process at various stages of its development, where identified social, economic and environmental considerations have been established and assessed as part of the plan making process.

In addition to the SA, Places for Everyone is also supported by a robust and extensive evidence base, that has been tested through the examination process by independent Planning Inspectors.

Given the above, the most relevant information at this stage is the extensive range of evidence used in support of the development and examination of Places for Everyone, available to view at Places for Everyone Joint Development Plan and supporting evidence

Stakeholder information/consultation:

The SPD will be subject to at least a six-week public consultation prior to adoption. Full consideration will be given to all the responses received as part of the consultation exercise. Amendments to the draft SPD will be made where necessary. Outcomes from the public engagement will be set out within a Consultation Statement.

Ongoing dialogue has been carried out with internal officers and stakeholders throughout the preparation process for the draft SPD and no issues concerning equality and community cohesion have been raised as a result of these consultations. It is proposed that, following the public consultation, a further version of the Elton Reservoir SPD will be brought back to Cabinet for formal approval.

If a review of the ERDF is appropriate, the scope and content of the updated SPD would be subject to a proportionate statutory and/or public/stakeholder consultation prior to being finalised. This EqIA would be updated to reflect any amendments to the ERDF.

It is anticipated that it could take up to 18 years to deliver the Elton Reservoir site. The ERDF provides a high-level strategy and key principles for the delivery of Elton Reservoir, whilst retaining flexibility to allow for opportunities across the site. Information

and associated impacts of delivering individual parcels of development within the site will be considered at planning application stage.

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	Different age groups have different housing and employment needs, which directly impact on how and when they choose to live.	The SPD includes proposals that will bring positive housing benefits to the young and old. As of 31 March 2024, there were 2,211 households on the housing register seeking affordable housing in the Borough and PfE requires development in the Elton Reservoir allocation to include affordable housing provision within which will help younger, first-time	The SPD is intended to apply to all age groups. It supports the provision for a range of housing including extra care and supportive living. Social uses such as retail, health, education facilities and public transport hubs are to be co-located to ensure	Neutral

		buyers get onto the property ladder. In addition, recent population projections indicate that there is likely to be a significant increase in the number of people aged over-65. The Housing Need and Demand Assessment (2020) estimates that there will be a need for an additional 578 units of specialist older person (planning use class C3) and 518 units of residential care (use class C2) from 2020-2037. There is expected to be an increase of around 403 dwellings needing major adaptation by 2030 to meet the needs of people illness or disability. This population changes are likely to present some challenges in terms of ensuring specific housing and care requirements of these groups can be met, and sufficient accommodation will have to be delivered to meet these needs. The SPD includes provision of a retirement village for older people, maximising their ability to live independent lives and retain control over their accommodation and services.	that all ages groups can access.	

		Public consultation methods will be designed to ensure all ages groups are engaged for example the use of leaflets, social media and drop in events.		
Disability	Different disability groups have different housing and employment needs, which directly impact on how and when they choose to live.	The SPD includes proposals that will bring positive housing benefits to all disabled groups The Housing Need and Demand Assessment (2020) estimates that there will be a need for an additional 578 units of specialist older person (planning use class C3) and 518 units of residential care (use class C2) from 2020-2037. There is expected to be an increase of around 403 dwellings needing major adaptation by 2030 to meet the needs of people illness or disability. This population changes are likely to present some challenges in terms of ensuring specific housing and care requirements of these groups can be met, and sufficient accommodation will have to be delivered to meet these needs. The SPD includes provision of extra care accommodation, maximising residents ability to live independent lives and retain control over their accommodation and services.	The SPD is intended to apply to all disability groups. It supports the provision for a range of housing including extra care and supportive living. Social uses such as retail, health, education facilities and public transport hubs are to be co-located to ensure that all disabled groups can access.	Neutral

		Additional requirements and guidance on design within the Elton Reservoir allocation should ensure improved access for less mobile people. Public consultation methods will be designed to ensure that key stakeholders, community groups and residents are engaged to ensure an inclusive approach.		
Gender Reassignment		There is no evidence that there will be a differential impact based on gender reassignment.		Neutral
Marriage and Civil Partnership		There is no evidence that there will be a differential impact based on marital or civil partnership status.		Neutral
Pregnancy and Maternity	Neutral	See above		
Race		There is no evidence that there will be a differential impact based on Race.		Neutral
Religion and Belief		There is no evidence that there will be a differential impact based on Religion on Belief.		Neutral
Sex		There is no evidence that there will be a differential impact based on the sex of a person.		Neutral
Sexual Orientation		There is no evidence that there will be a differential impact based on the sex orientation of a person.		Neutral

Carers		There is no evidence that there will be a differential impact for carers.		Neutral
Looked After Children and Care Leavers	Looked after children and care leavers may not be able to access open market housing	As of 31 March 2024, there were 2,211 households on the housing register seeking affordable housing in the Borough and the Plan includes a policy	PfE includes a policy requiring affordable housing provision within new residential development which will help younger, first-time buyers and socio-economically vulnerable residents get onto the property ladder. Development in the Elton Reservoir allocation will include affordable housing in line with PfE.	Neutral
Socio-economically vulnerable	Socio-economically vulnerable residents may not be able to access open market housing.	As of 31 March 2024, there were 2,211 households on the housing register seeking affordable housing in the Borough and the Plan includes a policy	PfE includes a policy requiring affordable housing provision within new residential development which will help younger, first-time buyers and socio-economically vulnerable residents get onto the property ladder. Development in the Elton Reservoir allocation will include affordable housing in line with PfE.	

Veterans		There is no evidence that there will be a differential impact on Veterans.		Neutral

Actions required to mitigate/reduce/eliminate negative impacts or to complete the analysis

2.5 Characteristics	Action	Action Owner	Completion Date
	EqIA to be updated following consultation to reflect the results of the consultation	Fran Smith	

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	0
3.3 Reasons for risk level calculation	Equalities impacts identified are all positive or will not affect other groups of people with protected characteristics. The type of development outlined in the document will benefit groups with protected characteristics including age and disability. Other groups with protected characteristics will not be negatively impacted by the SPD.

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	X	
There are low impacts or risks identified which can be mitigated or managed to reduce the risks and activity will proceed		
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	Fran Smith	16/10/2025	

Responsible Asst. Director/Director	Cris Logue	16/10/2025	
EDI	L.Cawley	11/12/2025	QA Complete: The analysis has identified potential impacts across some characteristics which will require consideration of mitigations as the development progresses. The EqIA will require update and revision as this development progresses

EqIA Revision Log

5.2 Revision Date	Revision By	Revision Details
		This EqIA will be continually reviewed and updated as the ERDF develops. Further information will be considered at planning application stage in terms of the delivery of individual parcels of development.

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Elton Reservoir

Development Framework

JPA 7
Supplementary Planning Document

February 2026

Bury Council

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Monitoring & Review

Foreword

The recently adopted Places for Everyone Joint Development Plan identifies the Elton Reservoir site as the location for a major new residential community. This development will provide new homes in a parkland setting, complemented by recreational facilities, education provision, and local amenities. It will be supported by strategic transport infrastructure, including a strategic link road, a new Metrolink stop and park-and-ride facilities, ensuring excellent connectivity.

Strategically positioned between Bury and Radcliffe, the Elton Reservoir site offers a unique opportunity to create a community within a rich, biodiverse landscape, while delivering infrastructure that benefits both towns. The development will integrate new neighbourhoods with high-quality, accessible green spaces for existing and future residents.

Alongside new homes and amenities, the project will boost the local economy and promote healthy, sustainable lifestyles through essential social infrastructure and improved transport links. This approach will generate lasting benefits for Bury, Radcliffe, and the wider area.

Our vision is to create a resilient, inclusive development that leaves a positive legacy for generations to come.

Bury Council is pleased to introduce the draft Elton Reservoir Development Framework, which sets out this vision and the critical infrastructure required to achieve it. This framework will guide future planning applications.

"Elton Reservoir offers a unique opportunity to create a new community in a parkland setting in harmony with nature. It will deliver new homes, green spaces, and local amenities.

Improved transport links, including a new Metrolink connection, will ensure excellent connectivity and lasting benefits for Bury, Radcliffe, and the wider area."



Cllr Eamonn O'Brien, Leader of Bury Council and Cabinet Member for Strategic Growth











Weave & Wander at Elton Reservoir





Chapter One

Introduction

Introduction to the Site

Site Description

The site is strategically located between Bury to the north and Radcliffe to the south, with the proposed development sitting approximately 1.5km south-west of Bury town centre and 0.5km north of Radcliffe town centre at its closest points.

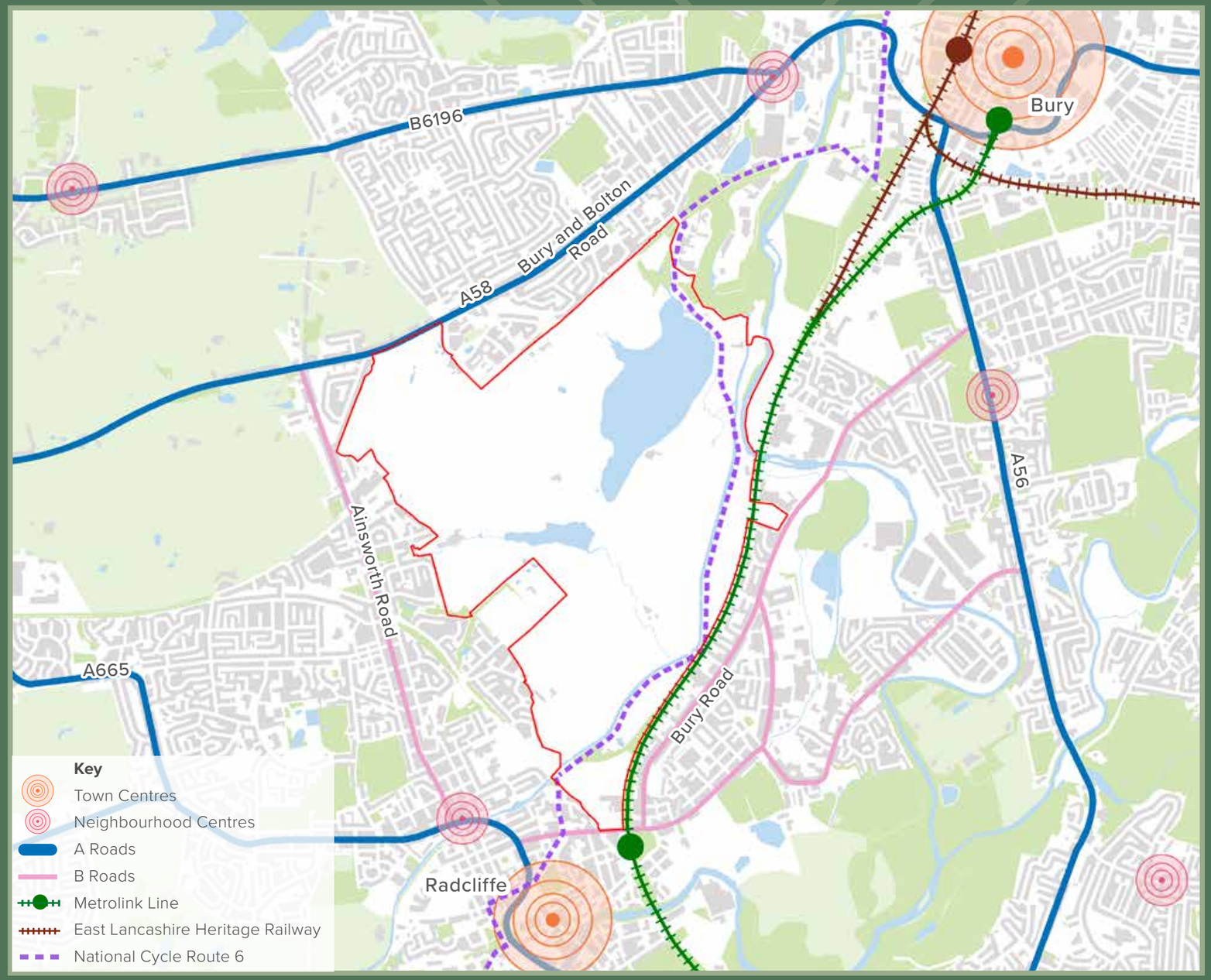
Bury and Bolton Road (A58) borders the northern boundary of the site, providing a direct route to Bury and Bolton. The A56 runs east of the site and provides connections towards Manchester; the A665, located south of the site, connects to Moses Gate.

The Bury-Manchester Metrolink line runs along the eastern boundary of the site and forms part of the Bee Network, which spans across Greater Manchester, with stations in both Bury and Radcliffe. The Radcliffe Metrolink stop, which provides connections to Bury and Manchester Victoria, is immediately adjacent to the southern part of the site.

The site is predominantly agricultural grasslands and also includes reservoirs, ponds, watercourses, woodland, hedgerows, scrub, and wetlands.

The southernmost part of the site, known as the Coney Green site, is a triangular parcel of land located just north of Radcliffe town centre, south of the Bury–Bolton Canal, and west of the Metrolink rail line. This section will host the new Star Radcliffe Academy, accessed from Spring Lane and scheduled for completion in Summer 2026.

The area within the red line covers a total area of approximately 244ha, of which approximately 115.5ha comprises land retained as Green Belt.



Strategic Location Plan

Introduction to the Site

Site Allocation

The Elton Reservoir site is allocated for development by Policy JPA7 of the Places for Everyone Joint Development Plan (PfE). This proposes a high quality sustainable new place comprising a broad mix of around 3,500 homes alongside schools, local retail and community facilities; and a range of transport and active travel infrastructure, all set within public open space.

Policy JPA7 requires proposals for the site to be in accordance with a comprehensive masterplan that has been approved by Bury Council, and to include a clear phasing strategy as part of an integrated approach to the delivery of infrastructure to support the scale of the whole development.

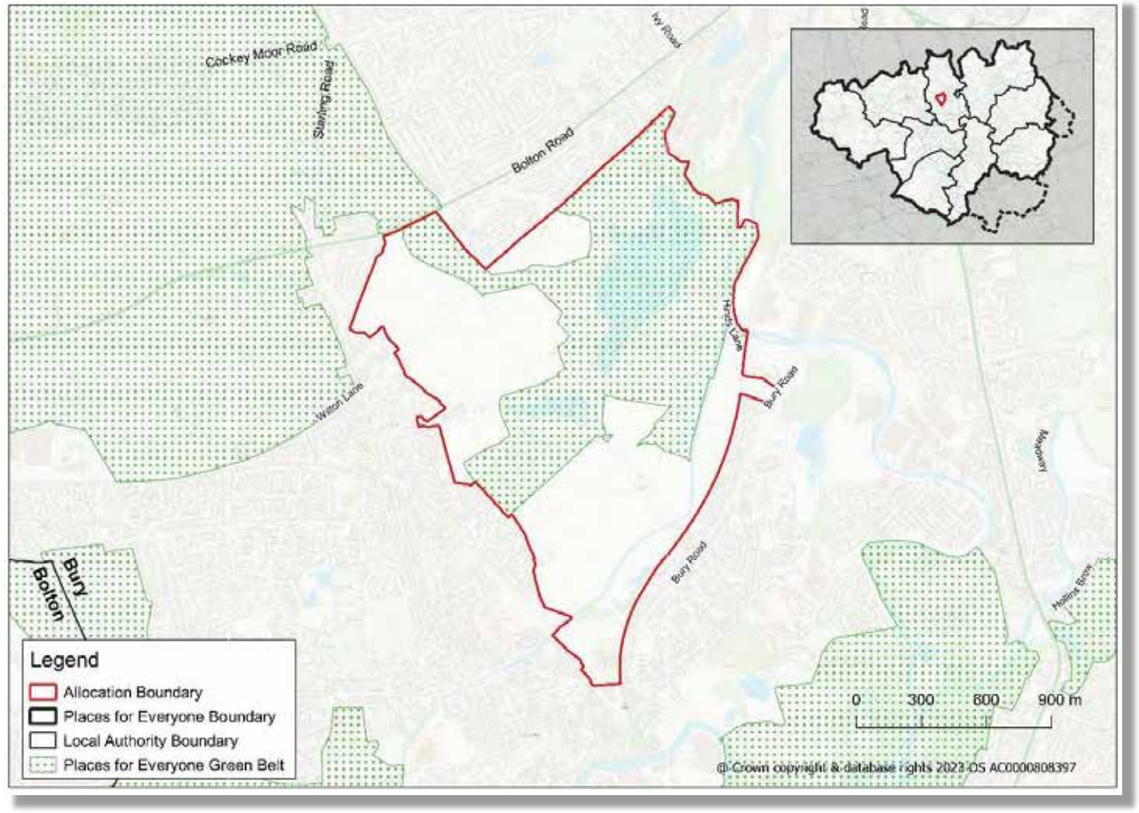
The Council has published further guidance, in Supplementary Planning Document (SPD) 18, on what it expects to see within future masterplans and phasing strategies for the Elton Reservoir site. This Elton Reservoir Development Framework (ERDF) and the Elton Reservoir Infrastructure Delivery and Phasing Strategy (IDPS) will fulfil the requirements of Policy JPA7 and SPD18.

The ERDF has been jointly prepared by Bury Council and Peel Land (as principal landowner and master developer). It has been informed by regular engagement with the Council and key stakeholders including Transport for Greater Manchester (TfGM), Greater Manchester Ecology Unit (GMEU), Greater Manchester Archaeological Advisory Service (GMAAS) and the Environment Agency (EA).

The structure of this ERDF is set out on page 11 of this document.

The extract below shows the Places for Everyone Joint Development Plan JP Allocation 7 - Elton Reservoir. This allocation is for:

"a broad mix of around 3,500 homes to diversify the type of accommodation in the Bury and Radcliffe areas. This includes an appropriate mix of house types and sizes, accommodation for older people, plots for custom and self-build (subject to local demand as set out in the Council's self-build register) and higher densities of development in areas with good accessibility and with potential for improved public transport connectivity, particularly in the southern areas of the allocation"



Extracts from Places for Everyone Joint Development Plan

Purpose of the ERDF

Delivery of the Elton Reservoir proposals will take place in phases and involve a range of delivery partners. The full development could take several years to complete. Developments of this scale, over this time period will be subject to many planning applications. The ERDF establishes a strategic framework for the delivery of the Elton Reservoir site to ensure the creation of a cohesive and sustainable place.

The preparation of the ERDF and its supporting evidence has enabled key issues to be identified and addressed to the satisfaction of the Council and key stakeholders at an early stage in the planning process. These have informed spatial parameters against which future planning applications will be considered, and helped to identify the necessary infrastructure required to support the development of the site.

The contents of the ERDF will inform the preparation of the Design Code(s) and the IDPS which will guide the overall development.

Role & Objectives

Once adopted, the ERDF will comprise a Supplementary Planning Document (SPD) and will be a material consideration in the determination of future planning applications. The ERDF, together with the IDPS, will be important documents to guide the preparation and determination of future planning applications within the masterplan area.

The ERDF's main objectives are to:

- establish an overall vision for the place being created;
- identify the likely extent of development and location of key infrastructure and facilities;
- set out key design and delivery principles with which future proposals for the site will be expected to comply; and
- provide certainty to the local community and future developers on the expectations for development across the area, whilst maintaining adequate flexibility to respond to further evidence and changing needs.

The ERDF sets out a high-level approach to the phasing of the development. The IDPS will provide further detail on phasing and the infrastructure that is expected to accompany the development of homes. The timing of individual phases will be dependent on a variety of factors including availability of funding for key infrastructure such as the Metrolink stop; and uptake of homes and commercial space. The IDPS will be a "living" document that is updated to reflect these and the overall progress of the development.

The ERDF does not grant planning permission for any aspect of the development. Approval will be sought through the submission of individual planning applications which the Council will consult upon and determine in the normal way. All applications within the Elton Reservoir site will be expected to be accompanied by evidence to show how they have taken account of the ERDF; are consistent with the site-wide vision and design principles; and will make fair and proportionate contributions to necessary infrastructure.

ERDF Structure

Section 2

Provides an overview of the site and its strategic policy context

Section 3

Presents the current understanding of the site drawing on the extensive technical studies and evidence base that has informed the masterplan

Section 4

Establishes a vision for the place to be created and the strategic objectives of ERDF

Section 5

Sets out the strategic design principles that have shaped the masterplan and identifies likely locations for facilities such as retail, community services and primary school provision

Section 6

Illustrates the proposed masterplan and identifies defining characteristics of proposed character areas within the site and the approach to varying densities across the site

Section 7

Sets out the development framework principles that reflect the key policy requirements that would be applied to planning applications for development on the site.

Outlines the strategic connecting infrastructure that will ensure a successful and sustainable place including the preferred alignment of the proposed link road; the creation of a travel hub at the proposed Metrolink stop; and the provision of a new Primary School

Section 8

Presents a high-level approach to the phasing and delivery of the development

Section 9

Summarises the sustainability strategy of the development

Section 10

Summarises the key benefits of the development, including social, environmental and economic benefits

Section 11

Sets out the social value strategy of the site

Chapter Two
Strategic Policy Context

Strategic Policy Context

The ERDF is prepared in accordance with relevant aspects of the development plan; Bury's and Greater Manchester's economic and transport strategies; and national planning policy and guidance at the time of adoption.

Policy and guidance which apply to the ERDF are summarised below. Policies of most relevance to particular topics are identified in Section 7.

Bury's Development Plan

Bury's statutory development plan currently comprises:

- The Places for Everyone Joint Plan (adopted March 2024);
- The Greater Manchester Joint Minerals Plan (adopted April 2013);
- The Greater Manchester Joint Waste Plan (adopted April 2012);
- The saved policies of the Unitary Development Plan (adopted August 1997); and
- The emerging Bury Local Plan (Regulation 18 consultation March-May 2025) which, once adopted, will replace the saved policies of the UDP.

Places for Everyone Joint Development Plan

Places for Everyone (PfE) is a long-term joint development plan for nine Greater Manchester authorities (Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Tameside, Trafford and Wigan) for jobs, new homes, and sustainable growth.

One of PfE's key spatial objectives is to boost the economic competitiveness of the northern districts of Greater Manchester. It proposes to achieve this partly by designating land within Bury, Rochdale and Oldham as the "North-East Growth Corridor" (Policy JP-Strat7). This is a strategic opportunity for economic growth and new housing in the northern part of Greater Manchester.

Bury is at the heart of the North-East Growth Corridor which includes part of the Northern Gateway allocation (Policy JPA1.1 and Policy JPA1.2), which forms part of the Atom Valley Mayoral Development Zone (MDZ). The strategic residential-led allocations including Elton Reservoir (JPA7); Seedfield (JPA8) and Walshaw (JPA9) are immediately adjacent to the Growth Corridor and are a key part of PfE's objective of boosting the competitiveness of Bury.

Elton Reservoir (Policy JPA7) is the largest housing-led allocation in Bury. The allocation allows for the delivery of around 3,500 homes (of which it is expected that around 2,100 homes will be delivered within the PfE plan period to 2039). It is specifically intended to diversify the type of accommodation in the Bury and Radcliffe areas.

Bury Unitary Development Plan

Policies of the UDP which remained saved after the adoption of Places for Everyone, have been taken into account in the preparation of this SPD. They will be taken into account in considering planning applications until they are replaced by the policies of the emerging Bury Local Plan.

Bury Draft Local Plan

Bury Council is preparing a new Local Plan which builds on the strategic framework established in PfE. While PfE sets out the overarching vision and strategic policies for growth and development across the Greater Manchester city-region, the Bury Local Plan focuses specifically on Bury's needs, challenges, and opportunities.

Bury Council consulted on a draft Local Plan between March and May 2025 and is currently considering the representations received.

The draft Local Plan includes a comprehensive set of locally specific planning policies that provide detailed guidance on a range of issues, including housing, employment, environmental protection, heritage, infrastructure, and design. It also identifies local designations that are essential to guiding development and protecting important assets within the borough.

Future planning applications within the masterplan area will be considered against the relevant adopted and emerging Local Plan policies.

Supplementary Planning Documents

The Council has adopted a number of SPDs to provide more detailed guidance on the implementation of a range of development plan policies. These are a material planning consideration and will be taken into account in considering planning applications within the masterplan area.

SPD18 "Development Frameworks for Strategic Site Allocations at Elton Reservoir and Walshaw" (April 2025) draws on the toolkit prepared by the Local Government Association and Planning Advisory Services for "The Effective Delivery of Strategic Sites" and provides more detailed guidance on the delivery of the Elton Reservoir and Walshaw allocations.

The ERDF has been prepared in accordance with guidance within SPD18 including in relation to:

- Collaborative working between the Council, landowners/ developers and key stakeholders on the form of development and approaches to its funding;
- Ensuring that the proposed development fulfils the vision and objectives that justified removal from the Green Belt;
- Making clear the evidence on which the proposed approach is based;

Strategic Policy Context

- Demonstrating a comprehensive approach to delivery across the whole site;
- Identifying strategic issues at an early stage and showing how they will be addressed in ways that are consistent with relevant planning policies;
- Establishing development parameters against which future planning applications will be considered;
- Ensuring that all development that would rely on or benefit from the infrastructure of the site makes fair and proportionate contributions to the delivery of that infrastructure for example through equalisation agreements and/or a tariff relating to each new dwelling on the site to support shared infrastructure; and
- Undertaking effective community and stakeholder engagement as part of the formulation of proposals and delivery of development.

National Policy and Guidance

The National Planning Policy Framework (December 2024) ('the NPPF') sets out the Government's planning policies for England and how these are expected to be applied, including guidance for plan-making and decision making. It confirms that in order to achieve sustainable development, the planning system has three overarching interdependent objectives, including:

- An economic objective – to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure;
- A social objective – 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; and
- An environmental objective – to protect and enhance our natural, built and historic environment; including making effective use of land, improving biodiversity, using natural resources prudently, minimising waste and pollution, and mitigating and adapting to climate change, including moving to a low carbon economy.

Paragraph 130 of the NPPF states that: *'Area-based character assessments, design guides and codes and masterplans can be used to help ensure that land is used efficiently while also creating beautiful and sustainable places…'*

The NPPF is supported by Planning Practice Guidance (PPG) which states that:
'Masterplans set the vision and implementation strategy for a development. They are distinct from local design guides by focusing on site specific proposals such as the scale and layout of development, mix of uses, transport and green infrastructure. Depending on the level of detail, the masterplan may indicate the intended arrangement of buildings, streets and the public realm…' and that 'A range of other plans and technical reports may be needed alongside a masterplan, to provide supporting evidence and set out related proposals, such as a local character study, landscape assessment, transport assessment and proposals for securing biodiversity net gain. An implementation strategy could also be included, especially where development is expected to be brought forward in a number of phases'. (Paragraph: 006 Reference ID: 26-006-20191001).

In describing how masterplans can be used most effectively, PPG states that:
'Masterplans are most likely to be produced by local authorities or developers. For local authorities, they can help to clarify design expectations early in the planning process, set a clear vision for the site, inform infrastructure and viability assessments and identify requirements for developer contributions or other investment.

Developers may produce a masterplan to help evolve their own vision for a site, assess options, engage the local planning authority and community in pre-application discussions and support an outline planning application.

Whoever prepares them, masterplans can benefit from a collaborative approach between the local planning authority, site promoters and local communities so that aspirations and constraints are understood early on. Masterplans produced by local planning authorities may be adopted as supplementary planning documents to give them weight in decisions on applications. Masterplans often apply to schemes that are developed over a long time period and so may need to be subject to regular review and be flexible to adapt to changing circumstances. Care should be taken to ensure that masterplans are viable and well understood by all involved and that graphic representations of what the development will look like do not mislead the public by showing inaccurate details or significant elements not yet decided upon'. (Paragraph: 007 Reference ID: 26-007-20191001).

This SPD has been prepared with full regard to the policies set out within the NPPF, as well as the Planning Practice Guidance which supports it.

In December 2025 the Government published proposed revisions to the NPPF for consultation. The revised draft NPPF currently carries very little weight but once adopted its contents will comprise important material considerations for planning applications.

Strategic Policy Context

Bury 2030 Strategy, 'LET'S Do It!'

In July 2020, Bury Council and NHS Bury Integrated Care Partnership launched an ambitious community strategy, "LET'S Do It!". This sets out a vision that by 2030 the borough of Bury will stand out as a place that is achieving faster economic growth than the national average, with lower than national average levels of deprivation.

The Bury 2030 Strategy seeks to build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity. The proposed housing at the Elton Reservoir site complements this objective.

Bury's Housing Strategy 2021-2025

The Council's housing strategy sets out intended outcomes from the Council's holistic approach to housing in the borough. These include delivering more homes in the borough; increasing affordable housing supply; and a more dynamic housing market. As set out above, the allocation of the Elton Reservoir site through PfE, supports these objectives.

Greater Manchester Transport Strategy 2040

The Greater Manchester Transport Strategy 2040 sets out Greater Manchester's long-term ambition for transport, with a vision for the city region to have *"world-class connections that support long-term sustainable economic growth and access to opportunity for all"*.

The strategy sets out a strong commitment to provide a transport system which: supports sustainable economic growth and the efficient and effective movement of people and goods; improves the quality of life for all by being integrated, affordable and reliable; protects the environment and supports the target to be net zero carbon by 2038 as well as improving air quality; and capitalises on new technology and innovation.

It sets a vision (referred to as the 'right mix vision') that 50% of all journeys in Greater Manchester are made by walking, cycling and public transport by 2040. This will mean one million more sustainable journeys every day enabling the delivery of a healthier, greener and more productive city region.

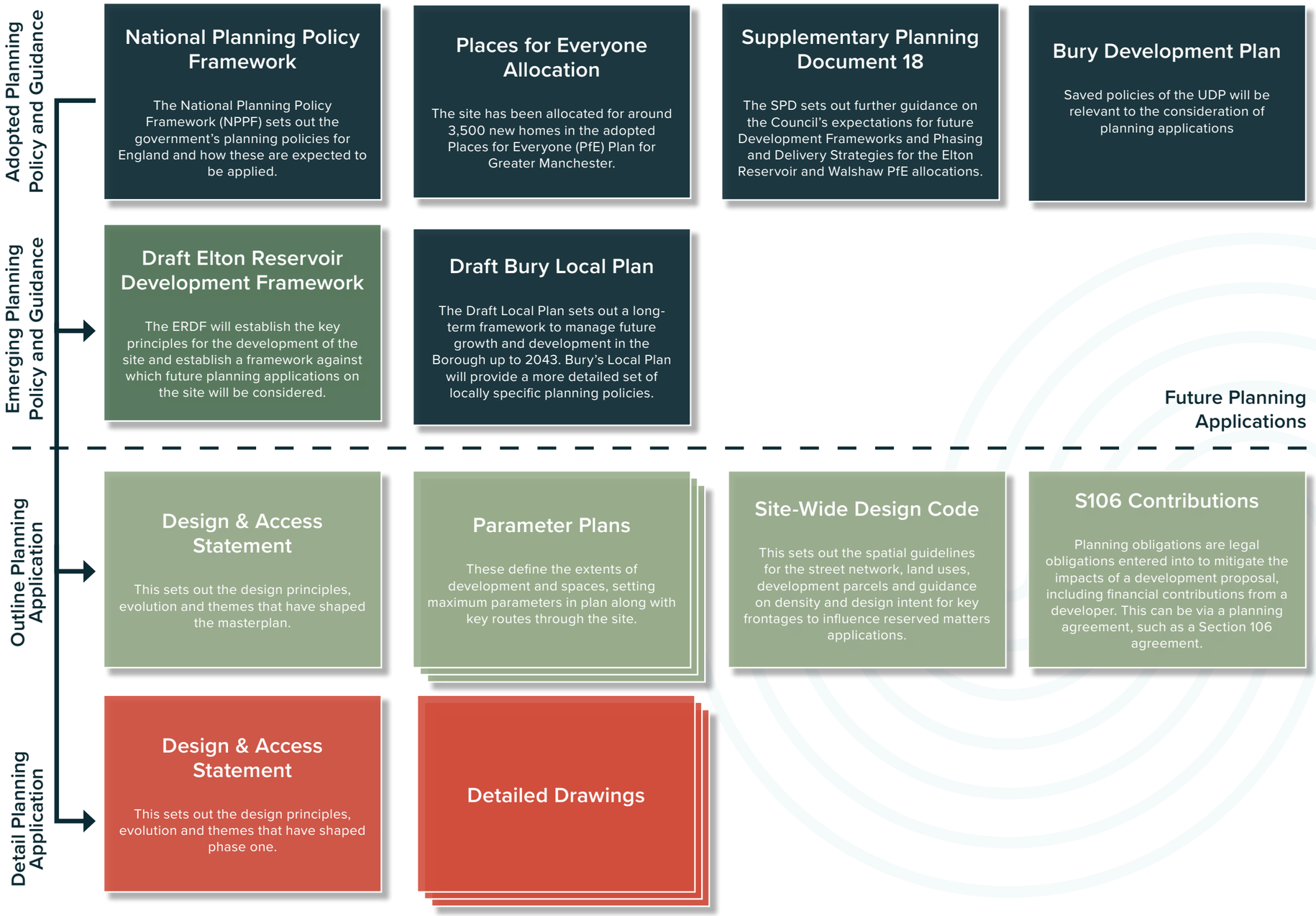
With appropriate layout and density of development, the provision for a new Metrolink stop, high quality bus services, and fully integrated active travel connections ensure that the masterplan as part of the Elton Reservoir development are consistent with these objectives.

Bury Local Transport Strategy

The Bury Local Transport Strategy was approved by the Council in October 2023 and sets out a plan for transport investment in Bury for the next 20 years and beyond, covering all modes of travel in the borough. The strategy aligns with the 'Let's Do It' vision for Bury and the Greater Manchester Transport Strategy 2040 and will be used to help secure investment for transport in the Borough.

The strategy seeks to link residents to new opportunities and to deliver on the Council's inclusive growth ambitions by connecting people to jobs, education, leisure and tourism. The ERDF makes provision for one of the strategy's investment priorities: a new Metrolink stop and travel hub/Park & Ride at the Elton Reservoir site including walking, wheeling and cycling connections to the new stops to make it safer and easier for people to walk, wheel and cycle to use the Metrolink at all times of the day.

Strategic Policy Context



Chapter Three

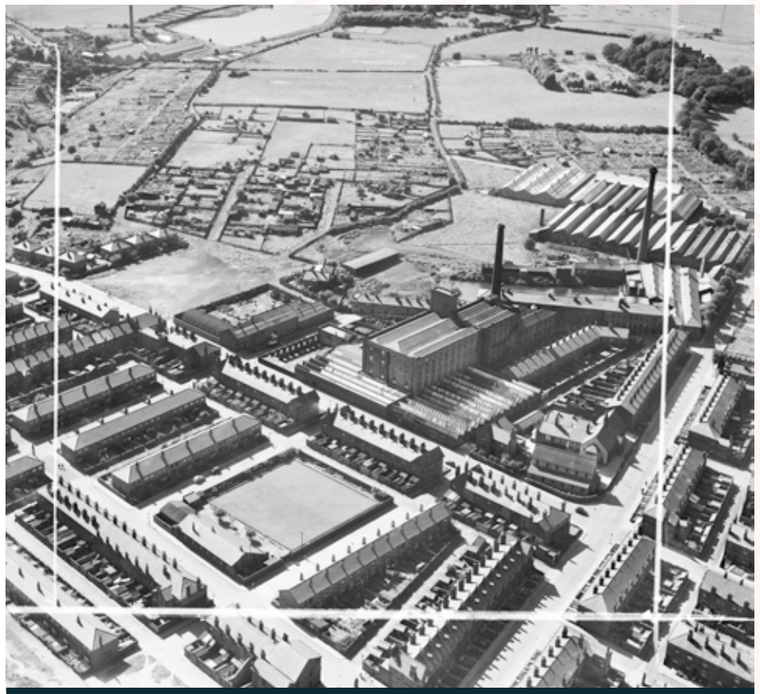
Understanding the Site

Site History

Evidence of prehistoric activity, including in the Radcliffe area, has been found across the borough of Bury. During the medieval period, the area was characterised by agricultural fields and common pasture, with scattered farmsteads (such as the Hams and Hardman's Fold) and the later 18th century farm buildings which reflected the continuing mix of rural activity.

The Industrial Revolution transformed Lancashire, with Bury and Radcliffe experiencing rapid change with mills built at speed following a boom in cotton production within the northwest from the late 18th century onwards.

The Manchester, Bolton and Bury Canal was completed in the 1790s, with Elton Reservoir constructed in 1808 and enlarged in the 1830s to secure its water supply.



Bury Cotton & Woollen Mills, 1933



Whittaker's Bridge

Railways soon followed, with lines through the area opening in the 1840s, and at one point Radcliffe had as many as seven stations. With this infrastructure, both towns developed into major industrial centres, not only for textiles but also for paper making, which would remain significant for the local economy well into the 20th century.

Leisure also began to emerge alongside industry, with the establishment of Elton Sailing Club in 1858. In 1904, the "Great Trespass" took place when local people successfully defended public access around the reservoir, paving the way for the 1949 Act that formalised Public Rights of Way.

The 20th century saw the significant growth of surrounding settlements. Early in the century, Radcliffe expanded northwards along Ainsworth Road, while Bury developed west towards Elton House with new housing, mills, and gas works.

After the Second World War, large areas of new housing were built on the edges of both towns, particularly along Bolton Road, Bury Road and Ainsworth Road. These changes reshaped the landscape around Elton Reservoir, with the area increasingly framed by expanding residential communities.

Site History

Up to 1890

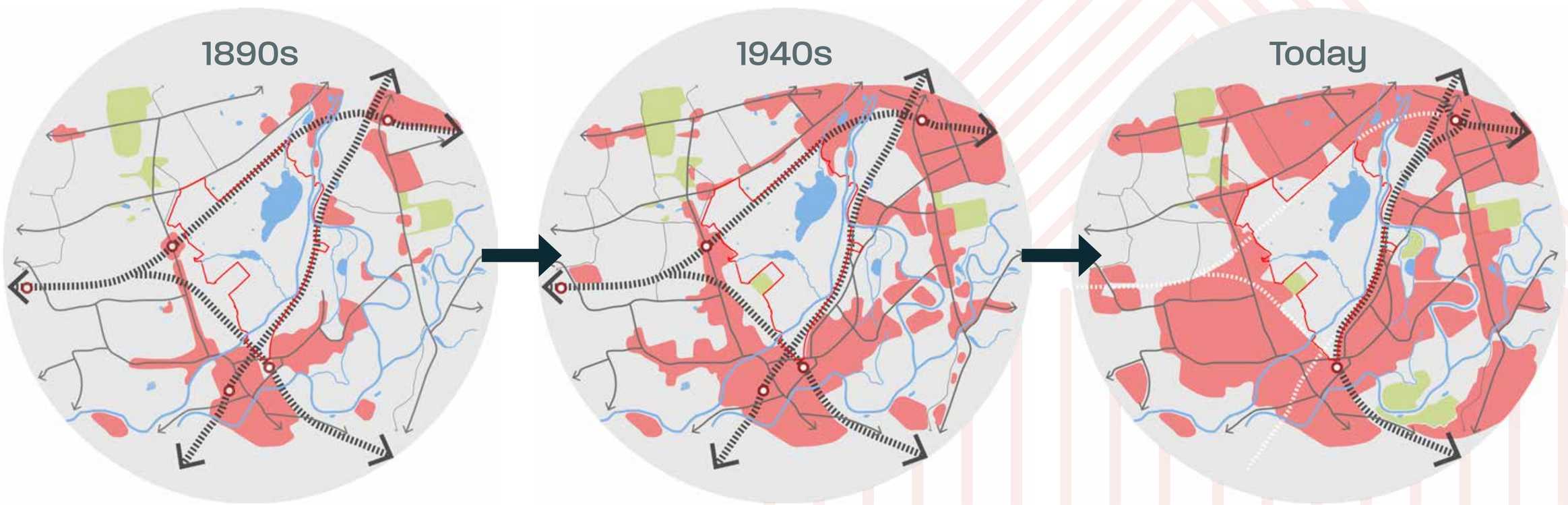
- From the mid-18th century, Bury and Radcliffe expanded rapidly;
- The Manchester, Bolton and Bury Canal completed in the 1790s, Elton Reservoir constructed in 1808 and enlarged in the 1830s;
- Railways arrived in the 1840s, including the Manchester, Bury and Rossendale Railway (1846) and the Liverpool and Bury Railway (1848);
- Construction of tightly packed terrace housing near Bury and Radcliffe town centres; and
- Elton Sailing Club was established in 1858.

1890 - 1945

- Continuing industrial growth peaking in early 20th century;
- Rapid residential growth of Bury and Radcliffe;
- Bury Bolton Canal falls out of use;
- Ribbon development along principal roads; and
- Public rights of way established across the site.

1945 - Today

- Closure of local railway lines and loss of direct services to Manchester in the 1960s;
- Industrial contraction but paper industry remained important until 1990s;
- Significant suburban expansion; and
- Opening of Metrolink line between Bury and Manchester in 1992.



The Site Today

Site Features

The site is predominantly undeveloped agricultural land sub-divided by hedgerows and tree belts. It accommodates a number of farmsteads.

The area retains visible elements of its industrial heritage, including the Elton and Withins Reservoirs, and the Manchester, Bolton and Bury Canal, which runs along the site's eastern edge.

Site Boundaries

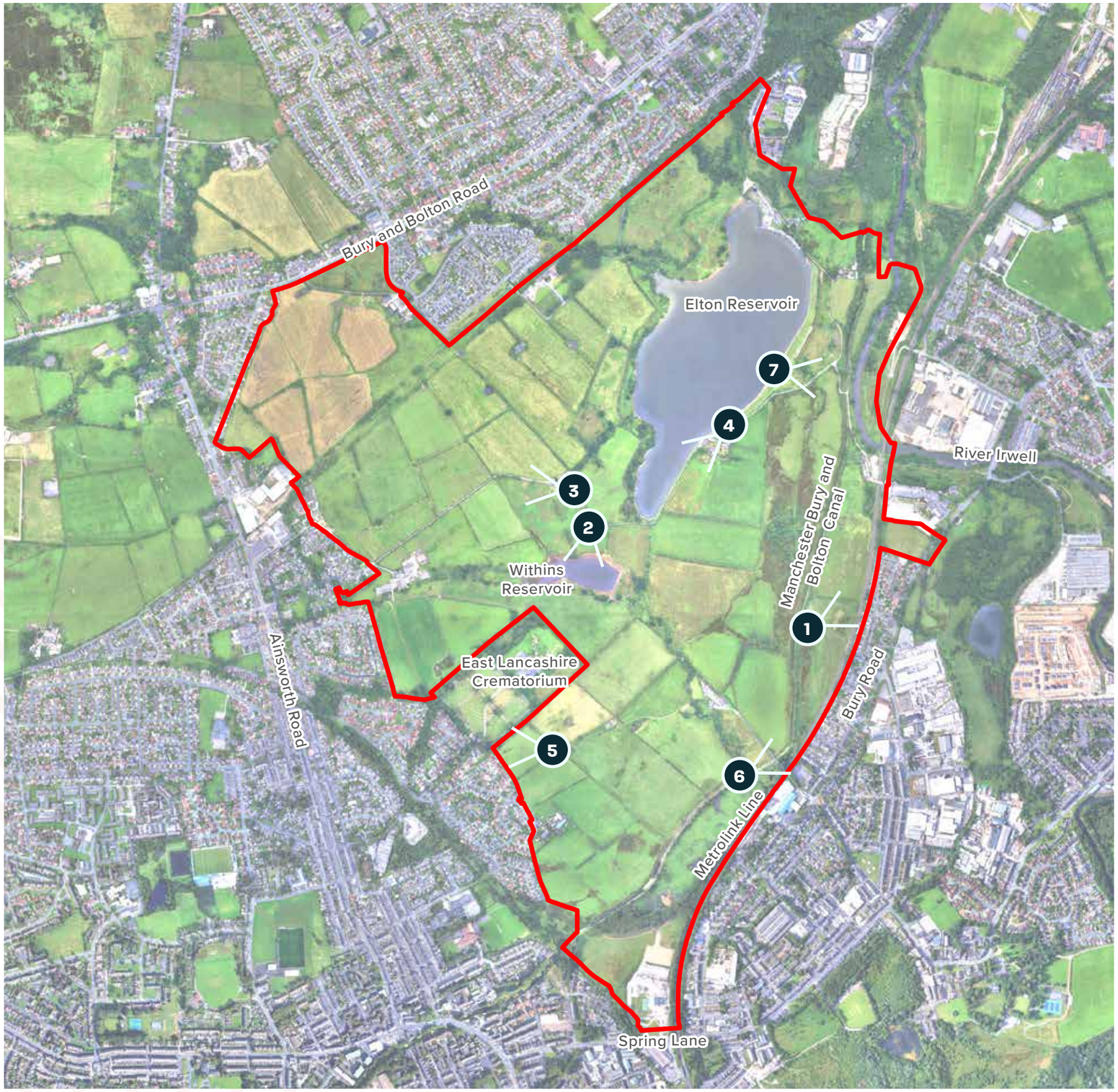
The site is largely enclosed by existing settlements, with Elton, Black Lane and Radcliffe located on three sides.

The western and north-western edges are characterised by existing residential properties predominantly backing onto the site, which create a well-defined boundary.

The site also encloses on three sides the Radcliffe Cemetery and the East Lancashire Crematorium, located along the western edge.

The eastern boundary largely comprises the Metrolink line, which also creates a strong physical edge separating the site from the existing residential area and industrial units to the east.

In contrast, the north-eastern boundary is more permeable, formed by a combination of open green space, woodland clusters and the River Irwell, of significant landscape and ecological value.



The Site & View Points



Metrolink



Withins Reservoir



Farmstead with Constellation Mill in the background



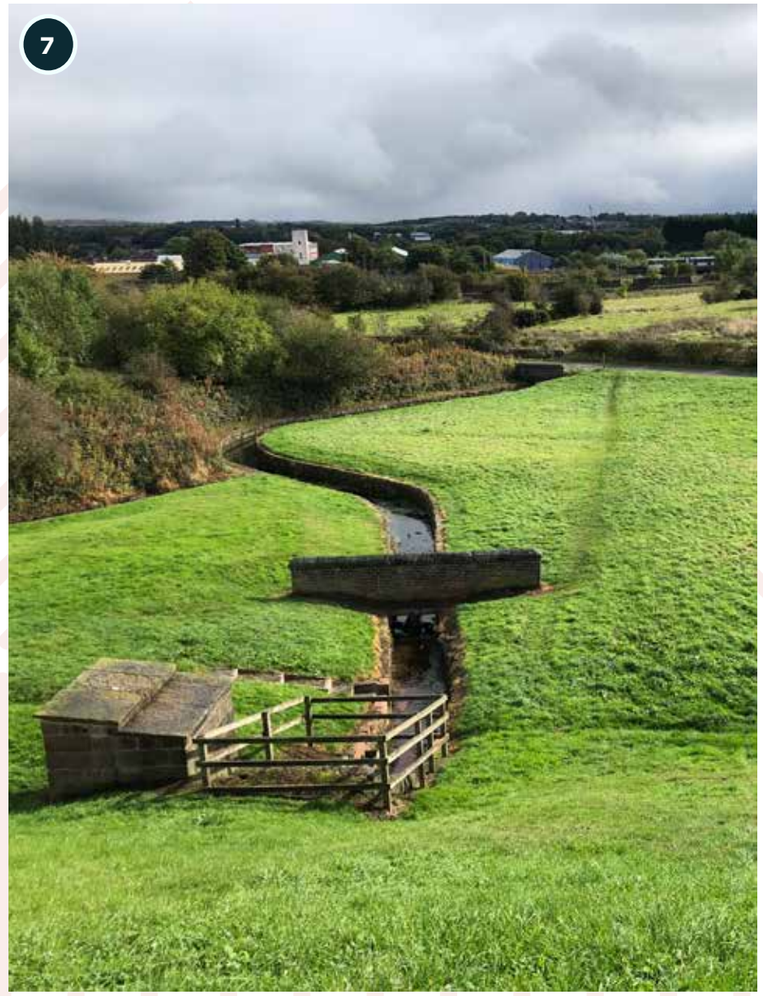
Radcliffe Old Hall Farm



Residential edge of Radcliffe



Manchester, Bolton & Bury Canal Towpath

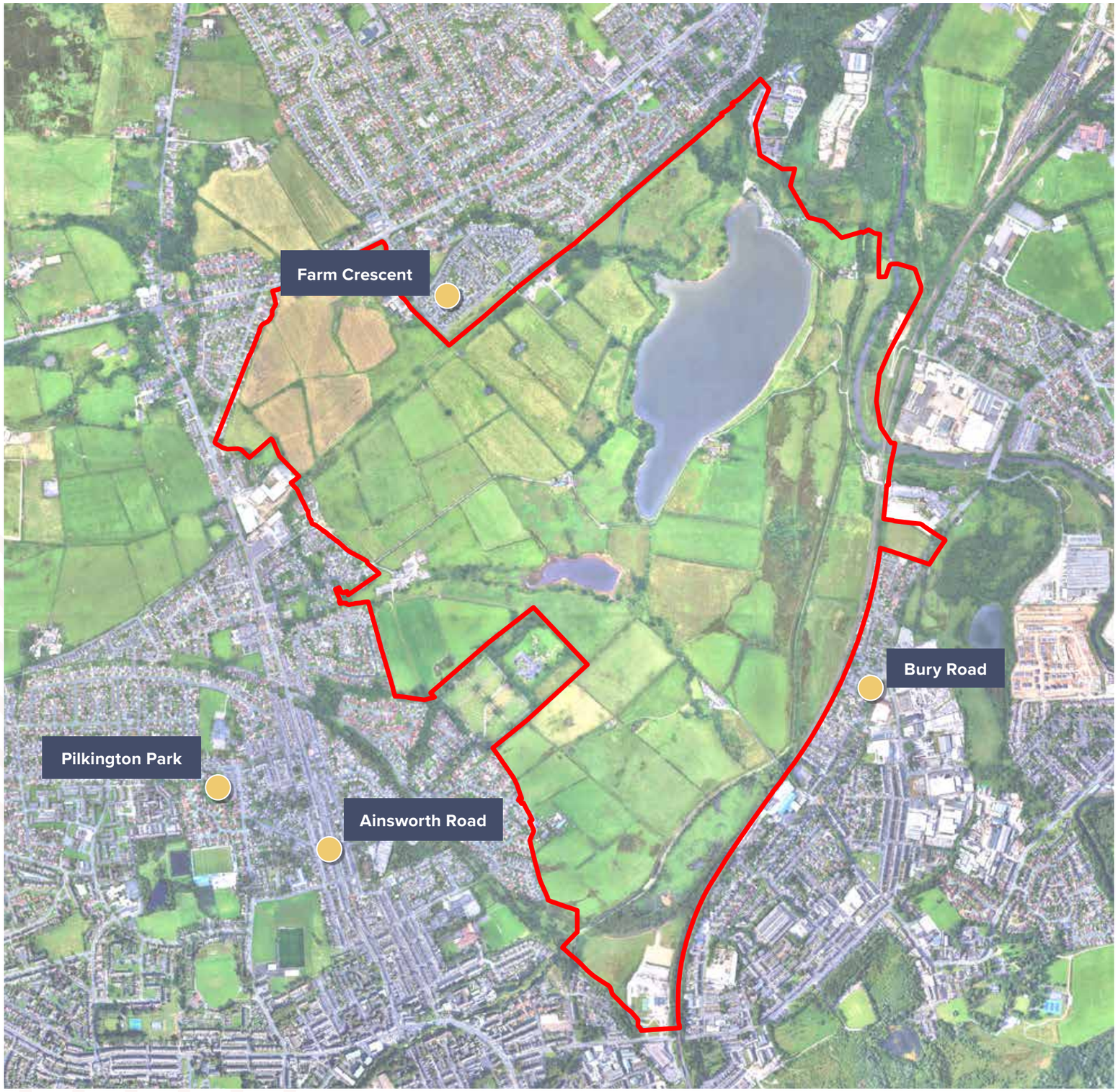


Open Landscape and drainage channel linking to the canal

Local Context & Character

The site abuts numerous areas of residential development on the western, northern and south-eastern boundaries. Understanding the character of the local area and what makes this area distinctive will help inform the design of the new neighbourhood at the site, in particular the urban forms and public spaces.

The study on the following pages focuses on the key spaces within the neighbouring developments, including arrival points, pocket parks, mixed-use and residential streets of various densities. These are also identified on the adjacent plan.



Local Context & Character Key Plan

Local Context & Character

Bury Road

Key Features

- Tree lined main road and bus route;
- Formal and continuous building frontage with short set-back from back of footpath;
- Limited on-plot parking, majority of parking located to the rear;
- Tree lined green verge and footpath on both sides of the road; and
- 2 - 2.5 storeys terraces facing the road.

Lessons Learnt

- Buildings typologies, short set-back and frontage continuity give a sense of formality, in line with the road type;
- A variety of parking arrangements are needed to avoid uncontrolled street parking; and
- The use of terraces and orthogonal parcel arrangement helps increase density.

Ainsworth Road (Radcliffe) and surroundings

Key Features

- Orthogonal parcel layout;
- Mixed-uses located along main road;
- Formal and continuous building frontage with short set-back from back of footpath;
- No on-plot parking, all parking located to the rear of properties; and
- 2 - 2.5 storeys terraces facing the road.

Lessons Learnt

- Continuous building frontage with short set-back from back of footpath gives the street a sense of enclosure;
- Mixed-uses activate the space; and
- Frequent uncontrolled street parking in the surroundings roads.



Aerial View



Bury Road - Street View



Aerial View



Ainsworth Road, Radcliffe - Street View

Local Context & Character

Pilkington Park

Key Features

- Line of 2-storeys terraced homes fronts the park to the east;
- Detached homes back onto the park to the south and west;
- Terraces form a continuous and strong building frontage with short set-back from footpath (Young Street);
- Park is car-free on three sides, with parking of terraces located to the rear and parking of detached homes located on plot; and
- Local shops are located at the corner of the park, along the main street.

Lessons Learnt

- The use of terraces gives the park a sense of enclosure, providing overlooking and sense of safety for park users - as well as increasing density;
- Mixed-uses fronting the park activate the space and promote park use; and
- Dwellings backing onto the park limit the sense of safety on two sides, not providing overlooking.

Farm Crescent

Key Features

- 2 - 2.5 storeys detached and semi-detached homes facing a green corridor and active travel route;
- Fragmented building frontage with longer front gardens/set-back from shared driveway;
- Majority of parking located on-plot; and
- Shared driveways serving 5/6 homes are located along the edge of the parcel.

Lessons Learnt

- Longer front gardens create a softer edge to the open space;
- On-plot parking limits uncontrolled parking along the street and parking courts but also limits built form density;
- Shared driveways limit the amount of road along the edge of the green space; and
- Homes fronting open space and active travel routes provide overlooking and promote the use of these spaces and routes.



Aerial View



Pilkington Park - Street View



Aerial View



Farm Crescent - Street View

Site Characteristics and Opportunities

Transport & Highways

Characteristics & Constraints

The site benefits from strong connectivity. The site is well served by public transport, offering a range of sustainable travel options. Radcliffe Metrolink stop is immediately to the south of site. Parts of the Elton Reservoir site are within convenient walking distance of the stop.

Several bus routes operate in the surrounding area. Route 98 runs along the northern and western edges of the site, providing direct links to Radcliffe, while Route 513 runs via Bury Road, connecting to both Bury and Radcliffe.

The A58 Bury and Bolton Road is a key route running north of the site and one of the main points of access to the site. Spring Lane and Bury Road run south and east of the site, offering direct connection to Radcliffe, as well as access to the site.

The A58 is an important strategic east-west link between Bury and Bolton. It passes round the south side of Bury town centre before continuing east towards Rochdale. The alternative route around the north side of Bury town centre is formed by the A56. The roads around and approaching the town centre are the busiest roads within the local area. To the south of the Site, the roads to the north of Radcliffe town centre are the busiest.

Opportunities

- Opportunity for new homes within convenient walking and cycling distance of Radcliffe Metrolink stop;
- New Metrolink stop on the Bury-Manchester Metrolink line within the site, along the eastern boundary;
- All-modes primary access points from Bury and Bolton Road, Bury Road and Spring Lane; and
- With connections to the existing highway network to the north, south and east, the link road through the site presents an important opportunity to provide alternative routes for some of these trips, thereby relieving existing congestion.



Transport & Highways Plan

Site Characteristics and Opportunities

Public Rights of Way, Footpaths & Cyclepaths

Characteristics

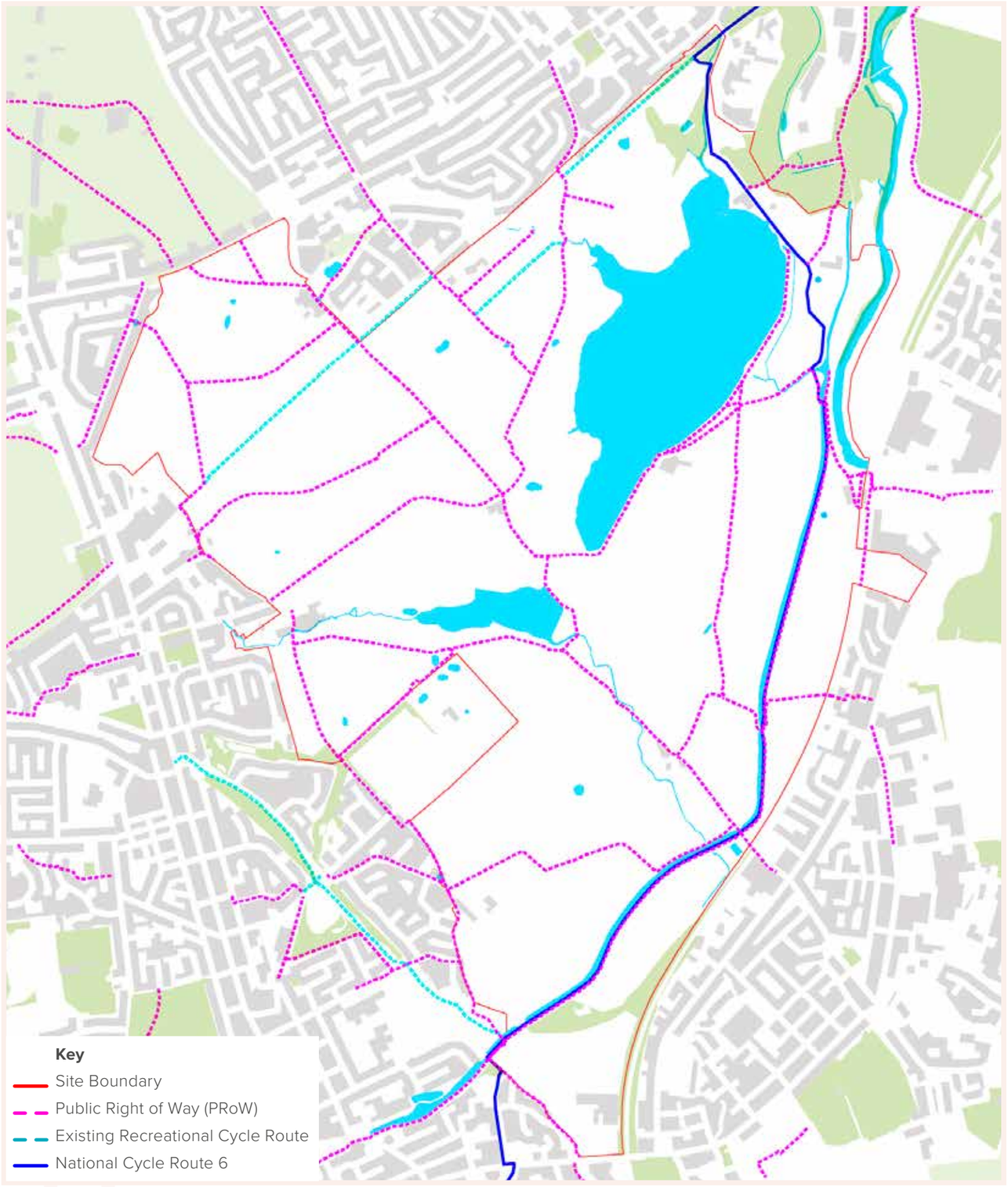
A network of Public Rights of Way (PRoW) runs through the site connecting to the wider network beyond the site boundary. National Cycle Route 6 runs along the Manchester, Bury and Bolton Canal, contributing to the area's active travel and long distance connectivity; and, a recreational cycle route runs along the north-western boundary.

Constraints

- PRoW and recreational routes require protection, continuity, and appropriate integration within future development;
- PRoW typically follow existing field boundaries and, as such, cannot always be retained entirely in situ without diversion; and
- A number of paths within the existing network are discontinued.

Opportunities

- Retain in situ and improve (if possible) the National Cycle Route 6, contributing to the area's long distance connectivity;
- Where possible, retain in situ the majority of PRoW and existing recreational routes, integrating them into the site's active travel network, improving links and creating new safe, more direct and traffic free connections;
- Where retaining is not possible, realign paths strategically and provide new linkages to create direct connections along users' desire lines; and
- Integrate paths within green infrastructure to promote sustainable travel and improve access to green space.



PRoW & Active Travel Plan

Site Characteristics and Opportunities

Built Heritage & Archaeology

Characteristics & Constraints

There are no heritage constraints that would preclude development of the site; however, there are several areas of potential historic interest within the site which should be considered at the outset of a design concept. The following heritage assets are located within the site:

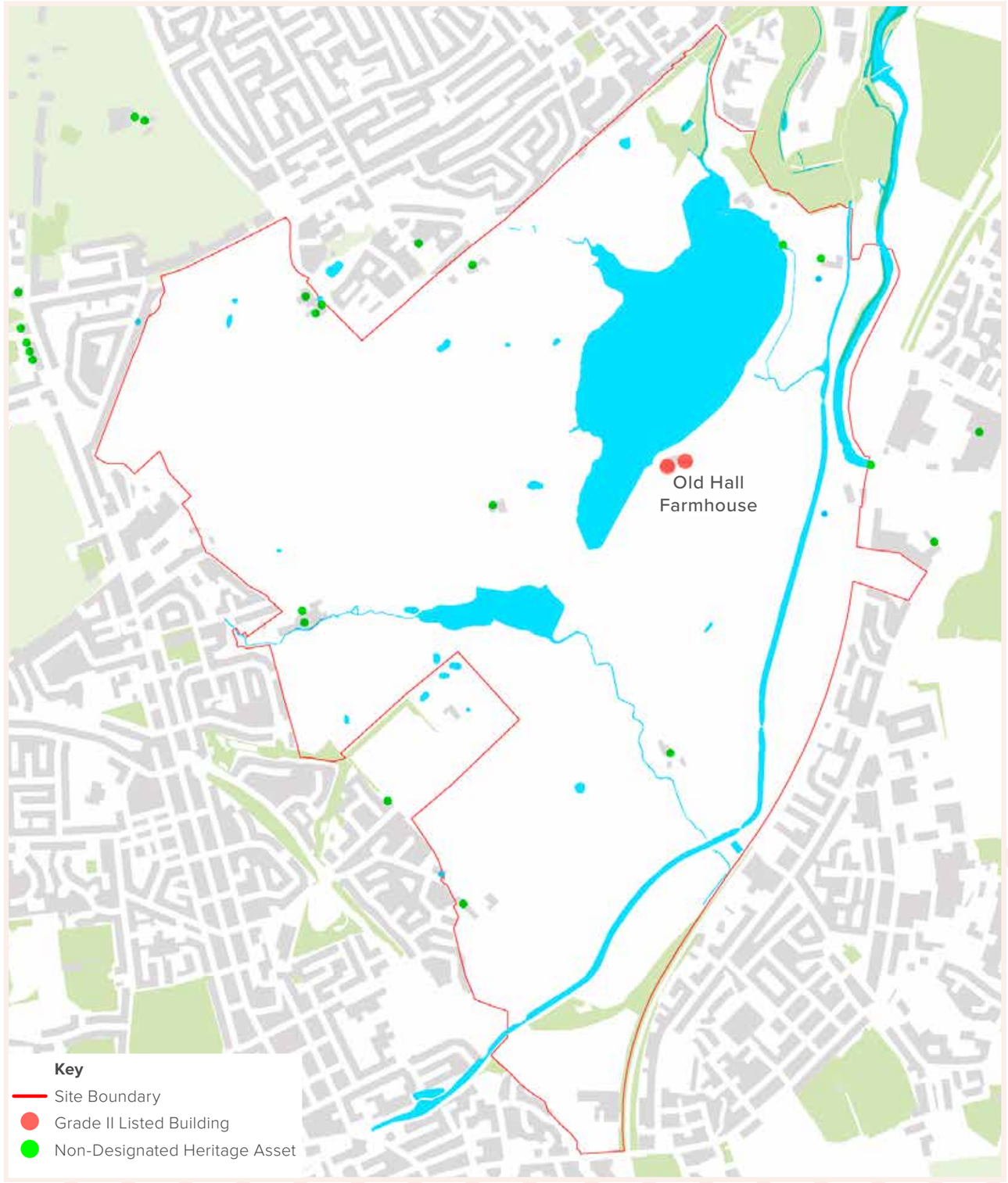
- Old Hall Farmhouse (grade II listed building) and the associated Gate Piers to the north west of Old Hall Farmhouse (grade II listed building).
- A number of farmsteads are included on the Draft Bury Local List. These are:
  - Higher Spen Moor Farm House
  - Doffer Fold Farm
  - Brook Bottom Farm
- A potential 'hengiform' monument and ring ditch south of Withins Reservoir and a nearby mound (near Hams Farm).

Dismantled railway routes and canals serve as a reminder of the area's industrial past with former mines, farmsteads and reservoirs present across the site and views to tall chimneys, warehouses and mills in the wider area.

In advance of development within the site further geophysical surveys, archaeological evaluation and sampling would be undertaken as required and archaeological mitigation strategies may subsequently be required in agreement with GMAAS. Future development at the site will subsequently be informed by the results of this programme of archaeological works.

Opportunities

- Retain Two Grade II listed buildings (Old Hall Farm and Gate Piers) within the development; and
- Aim to retain other non-designated heritage assets where possible.



Built Heritage Plan

Site Characteristics and Opportunities

Ecology

Local Wildlife Sites - Characteristics & Constraints

There are no statutory designated wildlife sites within or immediately adjacent to the site boundary. However, six non-statutory Sites of Biological Importance (SBIs) fall within the site boundary, recognising habitats and species of value in the local to regional context.

Habitats - Characteristics & Constraints

The site is predominantly characterised by agricultural grassland, supported by a range of engineered and semi-natural features including two reservoirs, smaller ponds, streams and canal sections, hedgerows, woodland, scrub and scattered trees. A single veteran tree is present, representing the only irreplaceable habitat on site.

The highest-value habitats, both intrinsically and in terms of wider ecological function, are those associated with the Elton Reservoir and Elton Goyt SBIs. These areas support a rich assemblage of birds and grassland fungi. The network of ponds across the site also provides important breeding and foraging habitat for amphibians, including great crested newt.

Species - Characteristics & Constraints

The site supports a broad range of protected and notable species.

Great crested newt surveys undertaken in 2021 recorded GCN in 11 ponds, comprising at least four distinct metapopulations. Other amphibians including common toad, common frog, palmate newt and smooth newt were also confirmed as present.

Badger surveys identified four setts within the site, including a main sett with five entrances.

Bat activity surveys show that common pipistrelle was the most frequently recorded species, followed by soprano pipistrelle, noctule, Myotis species and brown long-eared bat. All are generally considered widespread and relatively common.

Wintering bird surveys recorded a wide range of species of conservation concern within and adjacent to the site. Elton Reservoir SBI, Withins Reservoir SBI and Elton Goyt SBI represent the key areas of importance for wintering birds.

Breeding bird surveys recorded 84 species in 2021, of which 54 were confirmed breeders, with a further eight probable and three possible breeders.

Brown hare has been recorded frequently across the site, and otter are known to use the watercourses within the area.





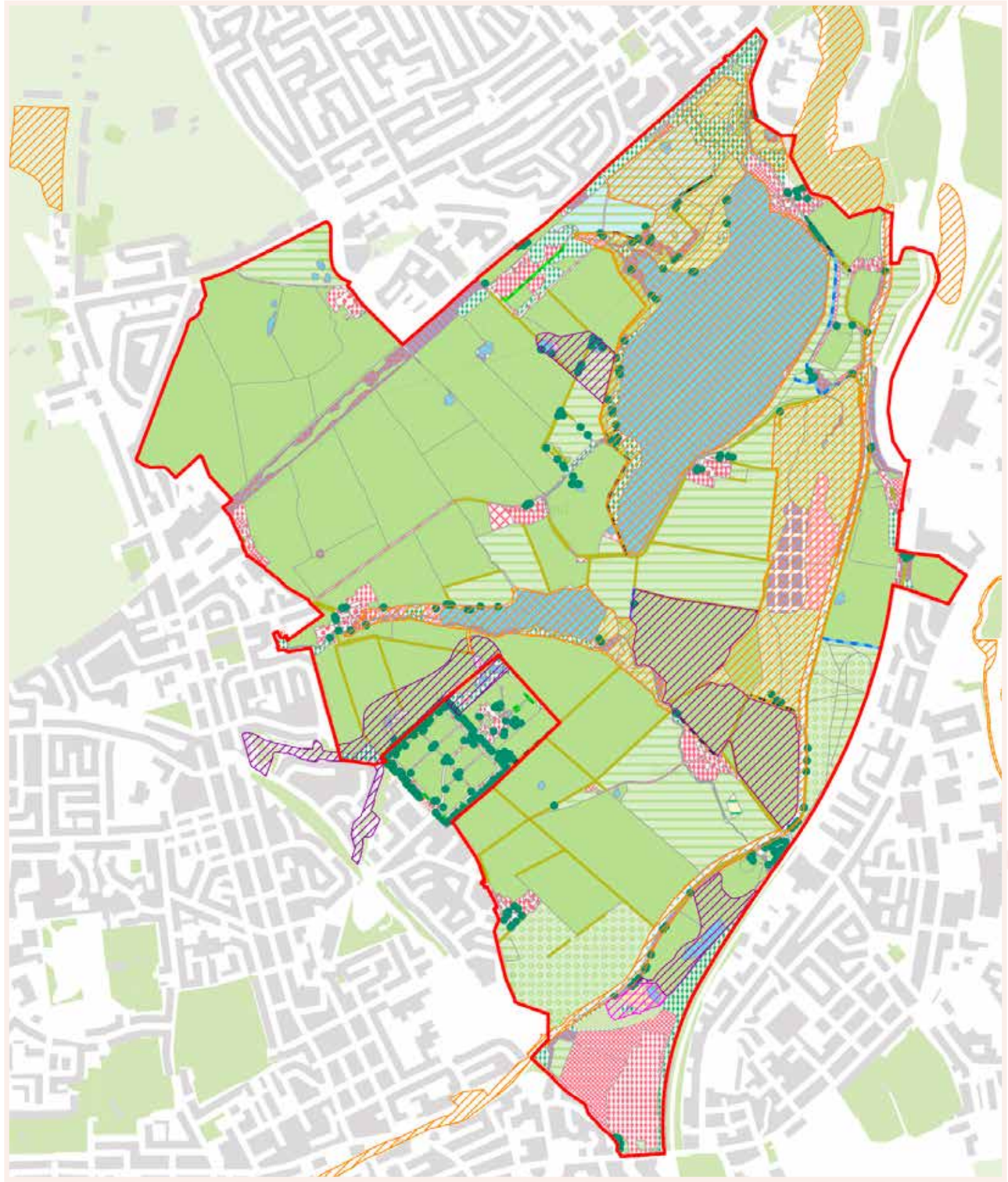
Existing Valuable Habitats

Site Characteristics and Opportunities

Opportunities

The development presents opportunities to deliver measurable enhancements to the site's ecological function through coordinated habitat protection, enhancement and creation.

Further detail on ecological opportunities is provided on the "Summary of Opportunities" pages at the end of this section.



UKHab Map

Site Characteristics and Opportunities

Flood Risk & Drainage

Characteristics

The site benefits from a varied waterscape that, as a result, generates areas of potential flood risk but also opportunities for enhancements.

Flood risk derives from fluvial sources (Withins Outfall), from surface water flow pathways associated with the natural topography, the minor field drains and watercourses, and from the residual flood risk from reservoirs.

Constraints

- Ecological and biodiversity constraints;
- SBI areas (including Elton Goyt) within the site. Future designs should take into account the discharge rates from development parcels near the SBI areas, needing to consider maintaining suitable baseflows to balance the water demand from these areas as well as water quality; and
- All anthropogenic sources of flooding such as the reservoirs and canal will be closely managed and mitigated within the drainage strategy plans to provide betterment to the development and surrounding area.

Opportunities

- The prevailing topography of the site falls from the highest point in the northwest to the lowest in the southeast. This elevation range allows the development to incorporate various natural SuDS features throughout the site, enhancing both drainage and the overall ecological and aesthetic appeal of the site.

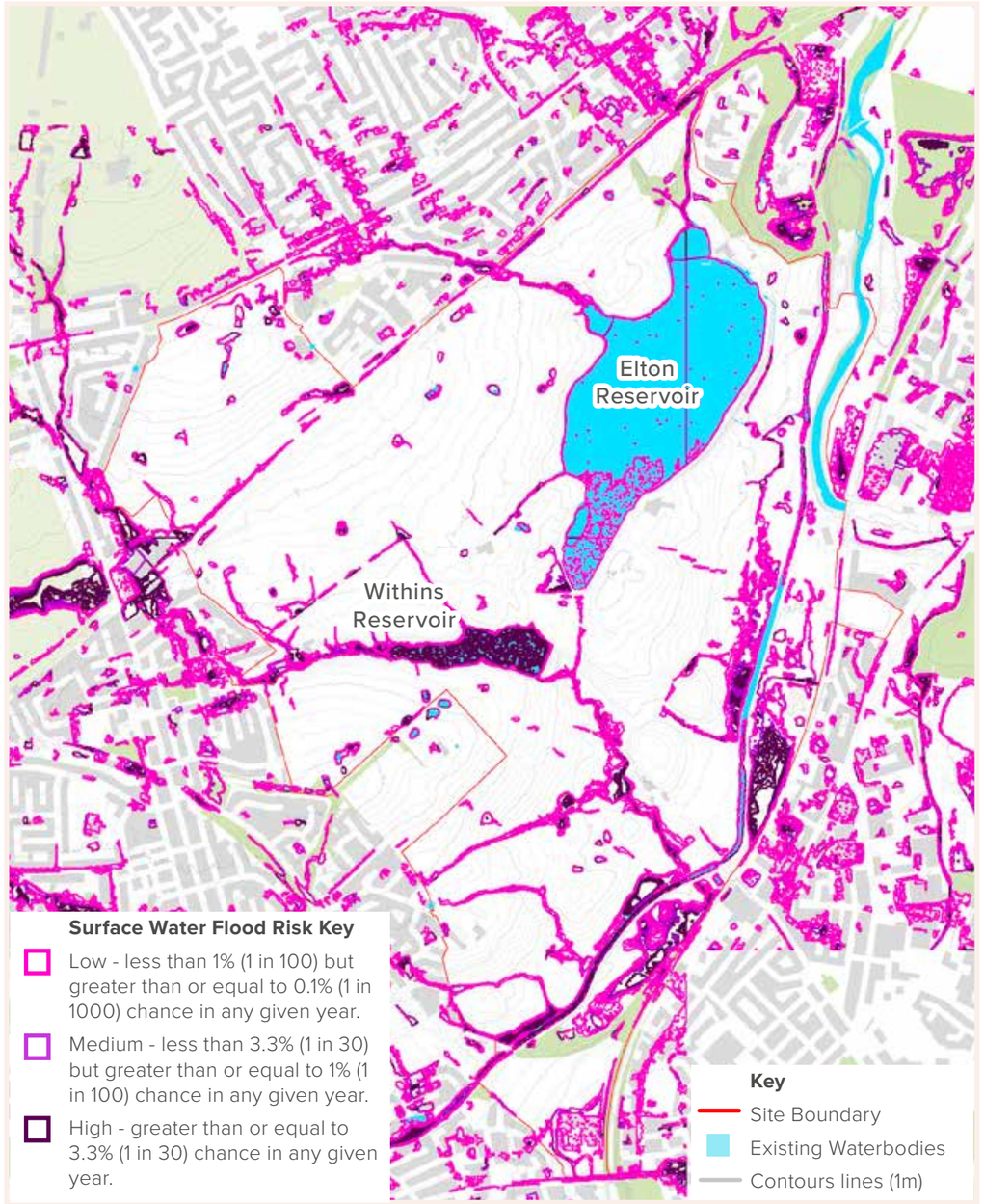
Surface Water Flood Risk

Characteristics

- Flood risk associated to surface water will not be a constraint to the site's development. Due to the minor watercourses and associated localised surface flood flow pathways, flood risk is limited and localised, mainly down to the limited upstream catchment size.

Opportunities

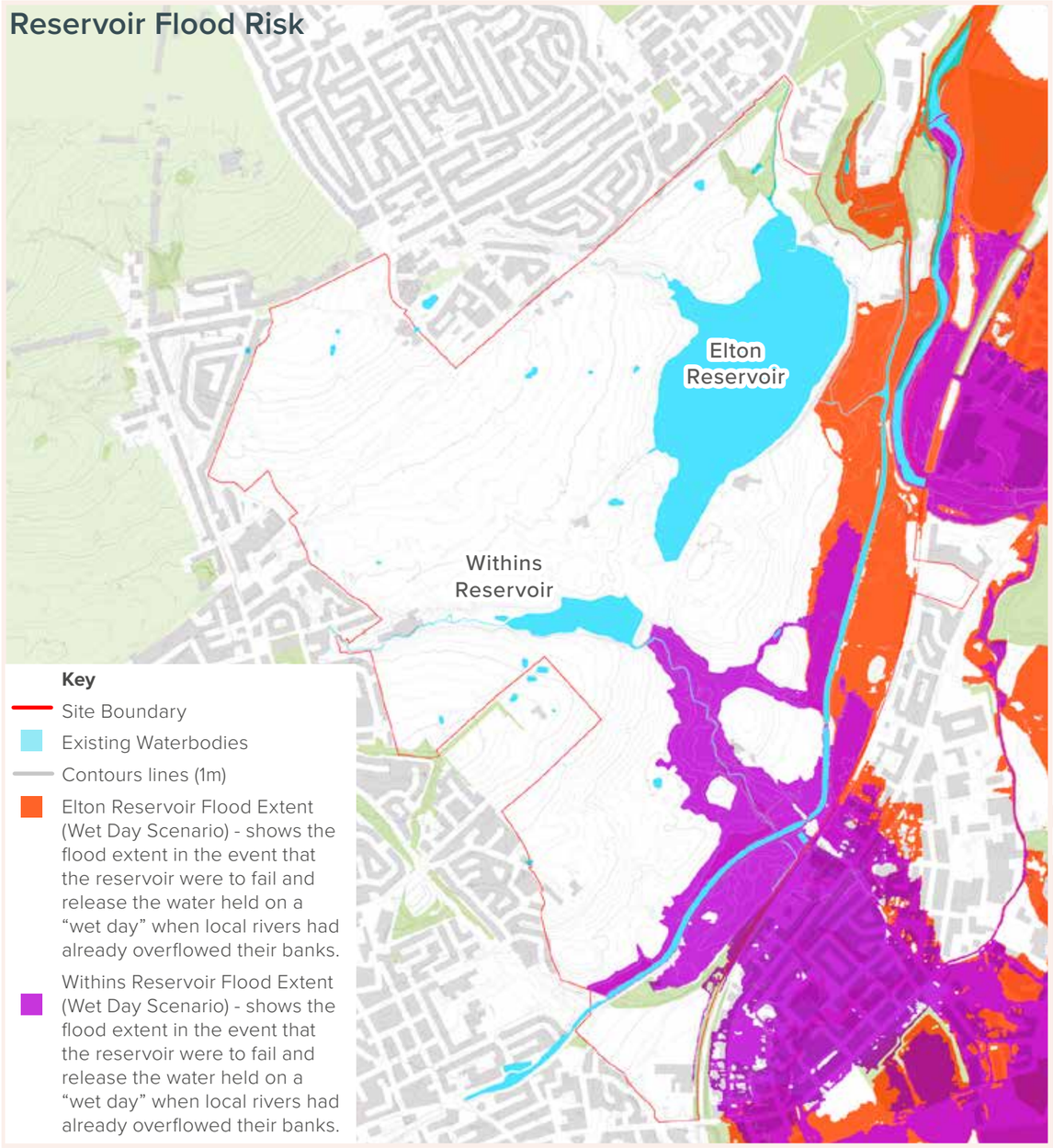
- By developing the site, surface water will be sustainably managed at a catchment level by incorporating a holistic strategy to provide an overall betterment;
- The SuDS features utilised across the development will be aligned to national policy and the Greater Manchester SuDS guidance, with the aim to manage water runoff within close proximity to the source;
- The proposed surface water management features will provide multi-faceted benefits by enhancing bio-diversity and the visual landscape character whilst capturing and attenuating rainfall; and
- Any remaining surface water flow paths will be incorporated into the development as blue-green corridors avoiding residential development.



Surface Water Flood Risk Plan

Site Characteristics and Opportunities

Reservoir Flood Risk

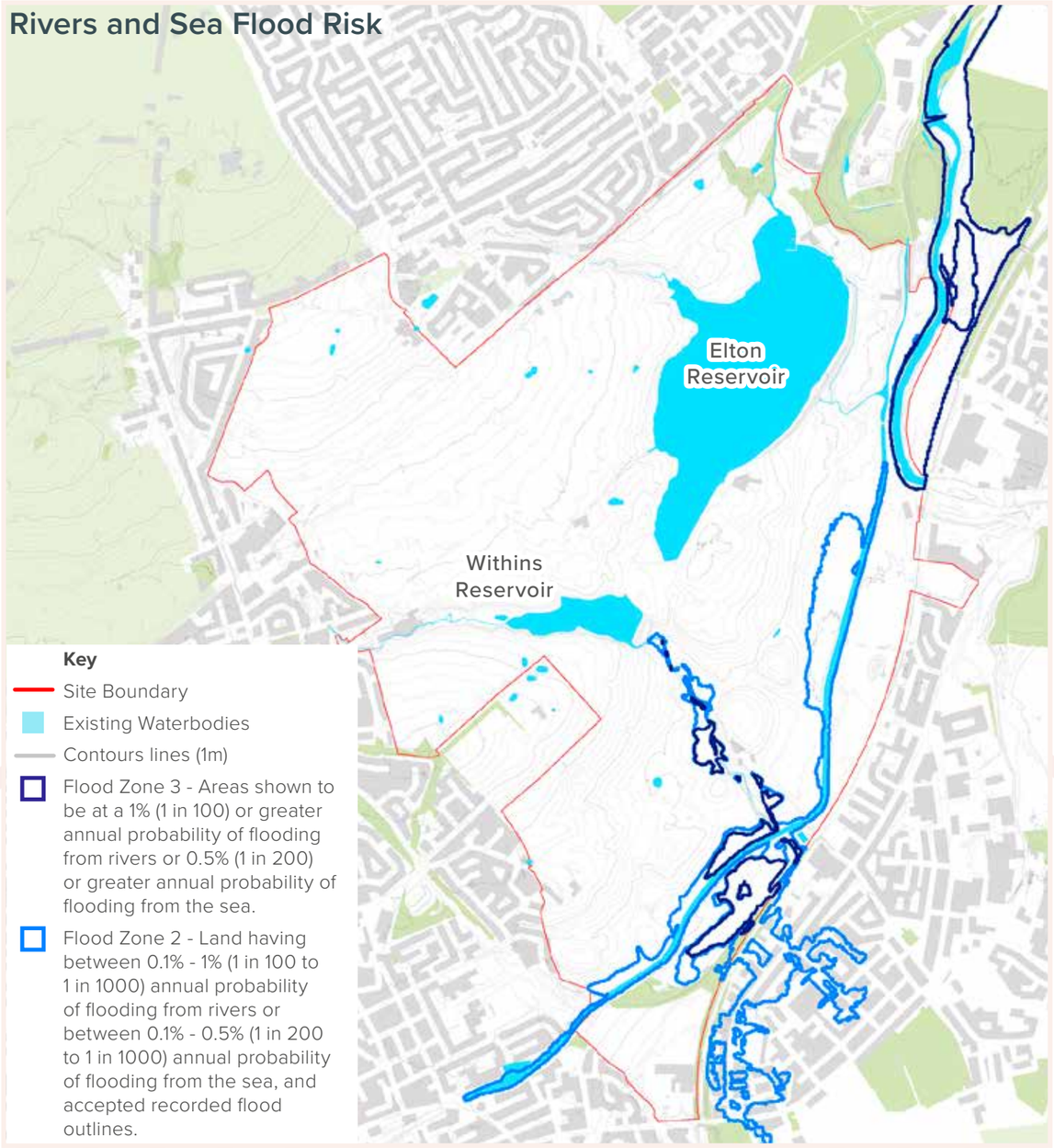


Key

- Site Boundary
- Existing Waterbodies
- Contours lines (1m)
- Elton Reservoir Flood Extent (Wet Day Scenario) - shows the flood extent in the event that the reservoir were to fail and release the water held on a “wet day” when local rivers had already overflowed their banks.
- Withins Reservoir Flood Extent (Wet Day Scenario) - shows the flood extent in the event that the reservoir were to fail and release the water held on a “wet day” when local rivers had already overflowed their banks.

Reservoir Flood Risk Plan

Rivers and Sea Flood Risk



Key

- Site Boundary
- Existing Waterbodies
- Contours lines (1m)
- Flood Zone 3 - Areas shown to be at a 1% (1 in 100) or greater annual probability of flooding from rivers or 0.5% (1 in 200) or greater annual probability of flooding from the sea.
- Flood Zone 2 - Land having between 0.1% - 1% (1 in 100 to 1 in 1000) annual probability of flooding from rivers or between 0.1% - 0.5% (1 in 200 to 1 in 1000) annual probability of flooding from the sea, and accepted recorded flood outlines.

Rivers and Sea Flood Risk Plan

Site Characteristics and Opportunities

Landscape & Visual Character

The site lies within National Character Area NCA 54: Manchester Pennine Fringe and Greater Manchester Local Character Area LCA 21: Little Lever and Elton Reservoir which are defined as Urban Fringe Farmland.

The site is typical of this character with rolling low grade pasture and semi-improved grassland dissected by a network of hedgerows and streams. Isolated woodland, wooded river corridors and sites of biological interest provide important habitats, particularly for waterfowl.

Green Belt - Characteristics & Constraints

- Nearly 50% of the site is designated Green Belt. Under planning policy, these areas are protected from development to safeguard the countryside and prevent urban sprawl.

Sites of Biological Interest (SBI) - Characteristics & Constraints

- The site contains no national designations and six local SBIs of various grades of importance. These areas require careful consideration and minimal intervention to ensure conservation of existing habitats.

Reservoirs and waterways - Characteristics & Constraints

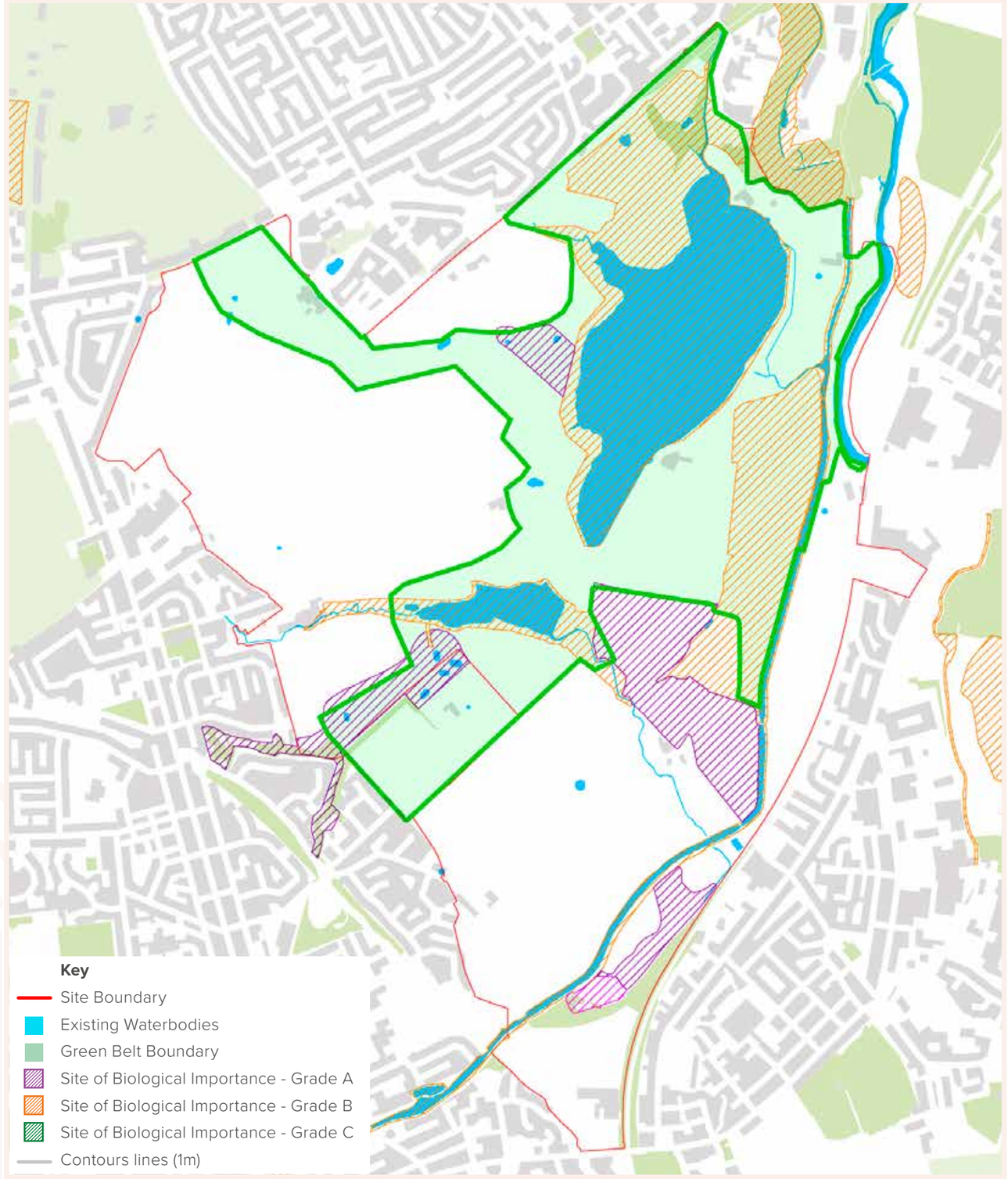
- The site includes two reservoirs (Elton Reservoir and Withins Reservoir), the Manchester, Bolton & Bury Canal and numerous streams, ponds and other watercourses. These are important habitat corridors and recreational and amenity assets.

Views and visual amenity - Characteristics & Constraints

- Panoramic views out to the surrounding countryside and hills are attractive and enhance walking routes. Key views to industrial buildings such as Constellation Mill and local churches are attractive and should be retained and enhanced where possible.

Opportunities

- Opportunity to enhance the Green Belt to create amenity green space for the community and natural open space beneficial to ecology and wildlife;
- Opportunity to enhance biodiversity across the site, avoiding (where possible) development on areas designated as SBI; and
- Opportunity to retain existing water features to create leisure destinations around these key landscape assets, as well as biodiversity net gain.



Landscape Constraints Plan

Site Characteristics and Opportunities

Trees, Woodland & Hedgerows

Characteristics & Constraints

- Pockets of trees and woodland and native hedgerows defining field boundaries provide habitat, shelter and a mature landscape character across the site;
- A single veteran tree of significant landscape value is located adjacent the cemetery and is the only irreplaceable habitat present on site;
- A number of other valuable trees have been identified and where possible, these will be retained and root protection buffer zones established and avoided by development; and
- The majority of trees and larger shrubs are contained within hedgerows along existing field boundaries. These have value for both wildlife as corridors and visual amenity, offering potential screening to new development.

Opportunities

- Opportunity to retain (where possible) existing landscape features such as hedgerows and tree lines, and integrate them within green corridors and open spaces, to ensure they continue to contribute to biodiversity and existing natural networks.



Trees, Woodland & Hedgerows Plan

Site Characteristics and Opportunities

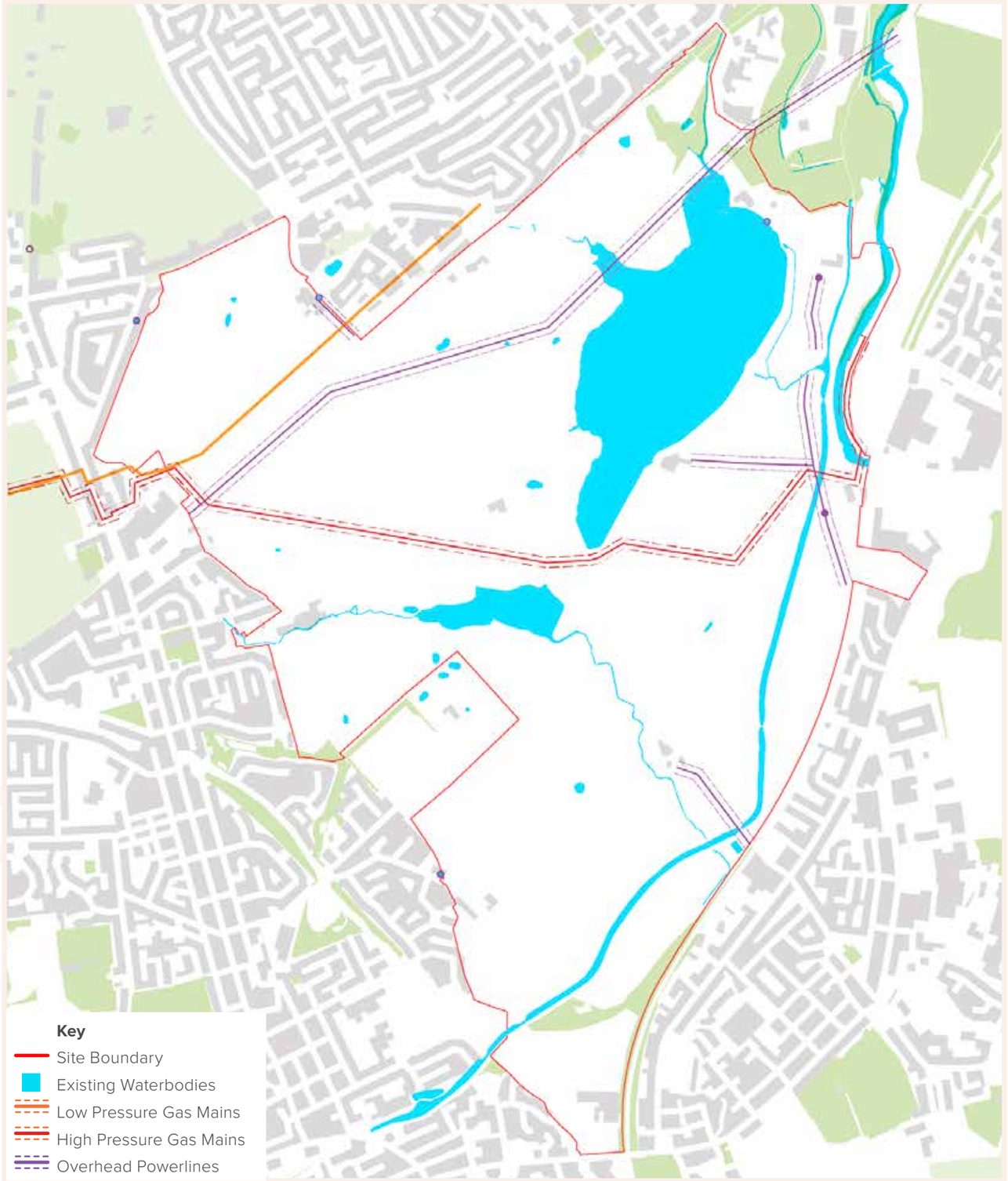
Utilities

Characteristics & Constraints

- High pressure gas main, low pressure gas main and overhead powerlines are present on site, which should be retained in place and development avoided within their easement zones;
- The existing developed areas around the site are served, in terms of surface and foul water, by United Utilities with an expansive system of consisting predominantly of combined sewer systems. A strategic foul sewer crosses the north of the wider development area. There are no other services within the site boundary; and
- With the current network, there will be available capacity for wastewater within the United Utilities strategic main located in the northeastern corner of the site as well as locally at the proposed highway connection points.

Opportunities

- Opportunity to create linear greenways along utility corridors preserving key views to industrial and community landmark buildings;
- The foul drainage strategy will include multiple connection points to aide to a flexible phasing strategy. This will include multiple sub-catchments and associated pumping stations; and
- Surface water will be dealt with within the site and does not need to connect to the external sewer network.



Utilities Plan

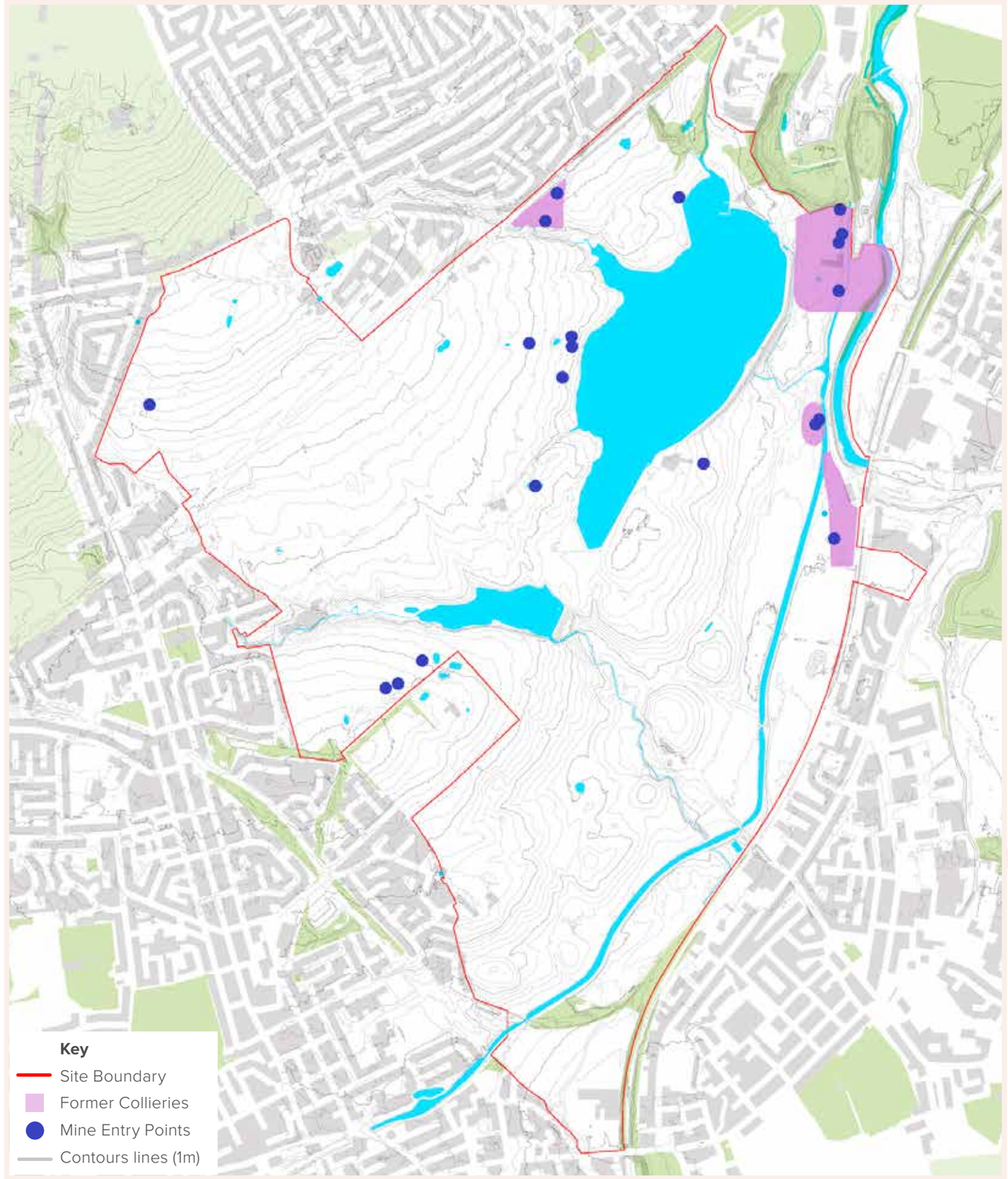
Site Characteristics and Opportunities

Topography

- The prevailing topography falls southeasterly from the highest level of 117 m Above Ordnance Datum (mAOD) alongside Bury and Bolton Road towards the lowest points of Manchester, Bolton and Bury Canal at 76 mAOD and Spring Lane at 70 mAOD;
- The site is undulating with height changes across its extent. Topographic valleys are present on site which naturally capture and channel surface water overland flow through to its lowest point. There are also ground depressions with lower elevations which can cause surface water to pool within them; and
- The disused canal passes through the site and is elevated against the surrounding ground.

Ground Conditions

- Through initial desktop studies the site is primarily glacial till underlain by Pennine Lower Coal Measures. Previous ground investigations of the site identified made ground to approximately 500mm overlaying sandy clay;
- The soil conditions are described as ‘slowly permeable seasonally wet and slightly acid but base-rich, loamy and clayey soils;
- Because of the underlying geology of the site, infiltration as a method of discharging surface water from the site would be limited and currently most likely not a viable widespread solution;
- Due to the historical use of the surrounding area for coal mining and the presence of reservoirs it is expected that groundwater levels will fluctuate across the site; and
- Former collieries and mine entry points are present on site, which development should avoid wherever possible.



Topography & Ground Conditions Plan

Site Characteristics and Opportunities

Retail & Services

The site is well positioned between Bury and Radcliffe, and benefits from proximity to a wide range of services and facilities located within both town centres.

Radcliffe town centre provides local services including retail, community facilities and recreational facilities, including the popular Radcliffe Market, a community owned and run market hall with local food.

Works are also ongoing at the site of the new Radcliffe Hub, in the town centre. The hub will bring a range of new leisure amenities, together with a new library, learning opportunities and community spaces, close to the Elton Reservoir site.

Bury is a larger town centre, located a short distance to the north and offering a broader mix of retail, cultural, and leisure amenities. There is a variety of restaurants and cafés, as well as the well-established Bury Market and The Rock and Millgate shopping centres. Bury also offers cultural attractions such as Bury Art Museum and The Met.

Additionally, the Elton Sailing Club at Elton Reservoir, the Outwood Country Park adjacent to Radcliffe, the Spring Water Park in Whitefield and Burrs Country Park in Bury provide access to open space and a variety of leisure routes.

Community

The site is relatively well-served by community centres. There is a cluster of community spaces to the east of the Site, comprised of the directly adjacent Radcliffe Girls and Boys Club as well as the Dumers Lane Community Centre and Manchester Road Community Centre.

Opportunities

- Opportunity to provide new, more accessible local facilities on site and meet the needs generated from the development without creating the need to travel by car.



Bury Art Gallery



Radcliffe Hub (in construction)



David Dixon ©

Manchester, Bolton & Bury Canal



Elton Reservoir Sailing Club

Site Characteristics and Opportunities

Education

There are 23 primary schools within a two-mile walking distance of the site with the nearest being: to the south west of the site – St Andrew's CEPS Radcliffe, Wesley Methodist, St Mary's RCPS Radcliffe, and Gorsefield; to the south east of the site – Radcliffe Hall; to the north east of the site – St Peters CEPS; and to north west of the site – St Stephen's CEPS, and Greenhill.

There are eight secondary schools within a three-mile walking distance of the site, including: Star Academy Radcliffe, Derby High, Bury CF High, St Gabriel's RC High, Elton High, Tottington High, Hazel Wood High, Unsworth Academy, Bury Grammar and Elms Bank School and College.

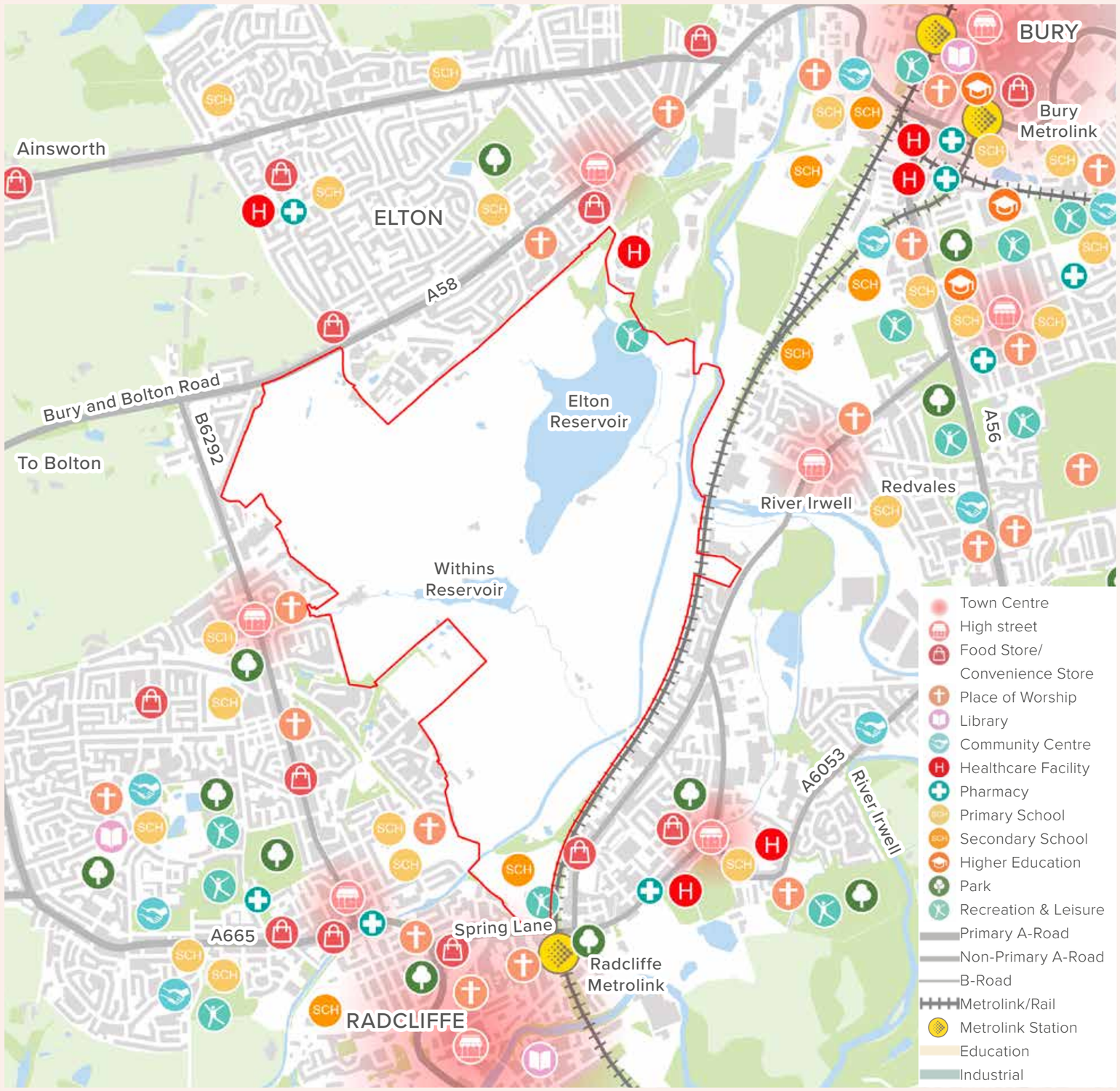
The need for school places arising from the development will be met through the provision of at least one new primary school on site and by utilising/expanding capacity within existing nearby schools.

Health

There are several GP surgeries within a two mile radius of the site. At present most of these record patient numbers above recommended averages. There are also a number of dentist practices within a two mile radius of the site. Several indicate that they are accepting NHS patients. New residents will increase the need for healthcare facilities. The proposed local centres will provide opportunities for additional GP/dentist and other healthcare uses.

Opportunities

- Opportunity to provide and/or new or expanded education and health facilities on site and/or in the surrounding area to meet the needs generated from the development.



Local Amenities Plan

Site Characteristics and Opportunities

Noise

The site is surrounded by existing urban settlements and roads which generate the dominant noise sources. Noise from farming, commercial and industrial uses is also present, within isolated areas within and adjacent to the site. Noise sensitive receptors within and around the site are limited to private residential premises and farmsteads, and the Radcliffe Cemetery.

The incorporation of key design measures will ensure relevant noise thresholds are not exceeded from the development of the site. Appropriate mitigation measures for the development may include noise protection fencing and/or bunds for the link road, and adequate separation distances between the link road and residential properties. Such mitigation should be considered at the outset of a design concept, and should clearly demonstrate how noise mitigation has been carefully considered to protect the amenity of existing and future sensitive receptors.

Air Quality

The site is not within an Air Quality Management Area. Future development traffic has the potential to increase pollutant levels in the area, however with the implementation of best practice air mitigation measures, in the form of sustainable transport options and the increasing use of electric vehicles, it is not expected that the development of the site would result in exceedance of relevant thresholds.

Opportunities exist to improve the environment with respect to air quality through the design of the scheme. This should include sensitive positioning of the link road, the provision of green and blue infrastructure networks to provide health benefits, and the integration of sustainable means of transport, including cycling and walking routes, as well as a comprehensive Travel Plan to educate occupiers and encourage use of these measures.



Metrolink Line

Summary of Site Constraints

Key

- Site Boundary
- Existing Waterbodies

Landscape & Open Space

- Green Belt Boundary
- Site of Biological Importance - Grade A
- Site of Biological Importance - Grade B
- Site of Biological Importance - Grade C

Trees

- Existing Trees
- Hedgerows
- 5m Tree Protection buffer
- Veteran Tree Protection Buffer
- Stem Location and RPA of Potential Veteran Tree

Public Rights of Way

- Public Right of Way (PRoW)
- Existing Recreational Cycle Route
- National Cycle Route 6

Heritage

- Grade II Listed Building
- Non-Designated Heritage Asset

Drainage

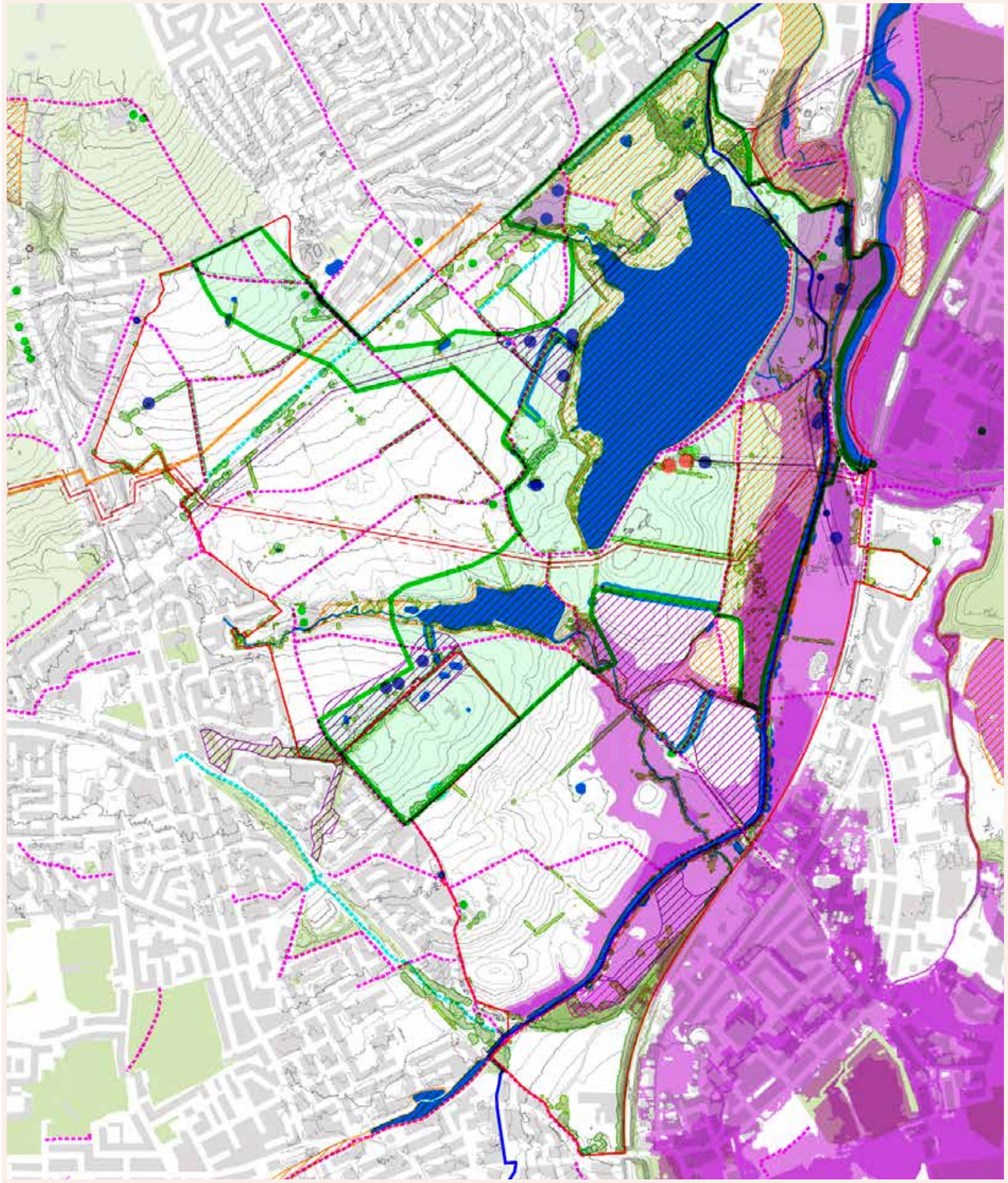
- Existing flood risk area

Ground Conditions

- Former Collieries
- Mine Entry Points
- Contours lines (1m)

Utilities

- Low Pressure Gas Mains
- High Pressure Gas Mains
- Overhead Powerlines



Constraints Plan

Summary of Site Opportunities

Transport, highways & Active Travel

The site is strategically located within the network of local buses, Metrolink service, A Roads and national cycle network, which make the Elton Reservoir site one of the most accessible and sustainable development sites in the Great Manchester area.

- Opportunity for sustainable travel using **existing Radcliffe Metrolink stop**;
- Opportunity for a **new Metrolink stop** on the Bury-Manchester Metrolink line within the site, along the eastern boundary;
- Opportunity for all-modes **primary access** points from Bury and Bolton Road, Bury Road and Spring Lane; and
- Opportunity for a **multi-functional link road** (including active travel, bus routes, local strategic highway and development access provision).

Public Rights of Way

- Opportunity to retain in situ (where possible) the majority of PRoW, National Cycle Route 6 and recreational routes, integrating them into the site's **active travel network** improving existing links, creating new connections and contributing to the area's long distance connectivity; and
- Opportunity for retained and new PRoW to **provide safe, more direct and traffic free connections** to existing bus services and local facilities.

Landscape & Open Space

There are a number of contained landscape features which can be retained and enhanced alongside the proposed development. These create the following:

- Opportunity to **create outdoor spaces** such as greenways, incidental open spaces and public realm to **encourage residents to spend time outdoors** walking, exercising and socialising (woodland, hedgerow, tree belt constraints); and
- Opportunity to **enhance the Green Belt to create amenity green** space for the community and natural open space beneficial to ecology and wildlife.

Trees, Woodland & Hedgerows

- Opportunity to retain (where possible) existing landscape features such as **hedgerows and tree lines**, and integrate them within green corridors and open spaces, to ensure they continue to **contribute to biodiversity** and existing natural networks.

Flood Zone & Drainage

- Opportunity to incorporate **existing water courses as ecological features** into the masterplan to enhance biodiversity, including the flood zones associated with these features as green space;
- Opportunity to design **surface water drainage features as multi-purpose landscape features**, for biodiversity as wetlands and/or for play areas or other recreational features; and
- Opportunity to **retain existing water features** such as Elton and Withins Reservoirs, the Manchester Bolton and Bury Canal and the River Irwell, to **create leisure destinations** around these key landscape assets, as well as biodiversity net gain.

Utilities

- Opportunity to create **linear greenways along utility corridors** preserving key views to industrial and community landmark buildings (views and visual amenity).

Ecology & Biodiversity

Local Wildlife Sites

- Opportunity to **safeguard and enhance the network of SBIs** through targeted habitat management, hydrological improvements and strengthened linkages via new and improved green corridors (avoiding, where possible, development on areas designated as SBI); and
- Opportunity to **create spaces for nature engagement** with increased public access to green space (an access management strategy will be required to address potential recreational pressure on sensitive habitats and species).

Habitats

- Opportunity to integrate and enhance existing reservoirs, ponds and watercourses with SuDS to **deliver wetland and aquatic habitat benefits**, supported by reinforcement of woodland, scrub and hedgerow networks and the **creation of species-rich grassland** within the green infrastructure framework; and
- Opportunity to achieve at least a **10% measurable Biodiversity Net Gain**, which is expected to be secured through a combination of on-site habitat creation and enhancement and delivery of a strategic biodiversity offset.

Species

- Opportunity to deliver a **species-specific mitigation programme** that will protect and enhance conditions for key species including amphibians such as great crested newt, bats, otter and a range of bird species.

Summary of Site Opportunities

Built Heritage

- Opportunity to **retain two Grade II listed buildings** (Old Hall Farm and Gate Piers) within the development;
- Opportunity to **retain** other non-designated heritage assets where possible; and
- Opportunity to retain heritage features and re-interpret them as **place-making opportunities**.

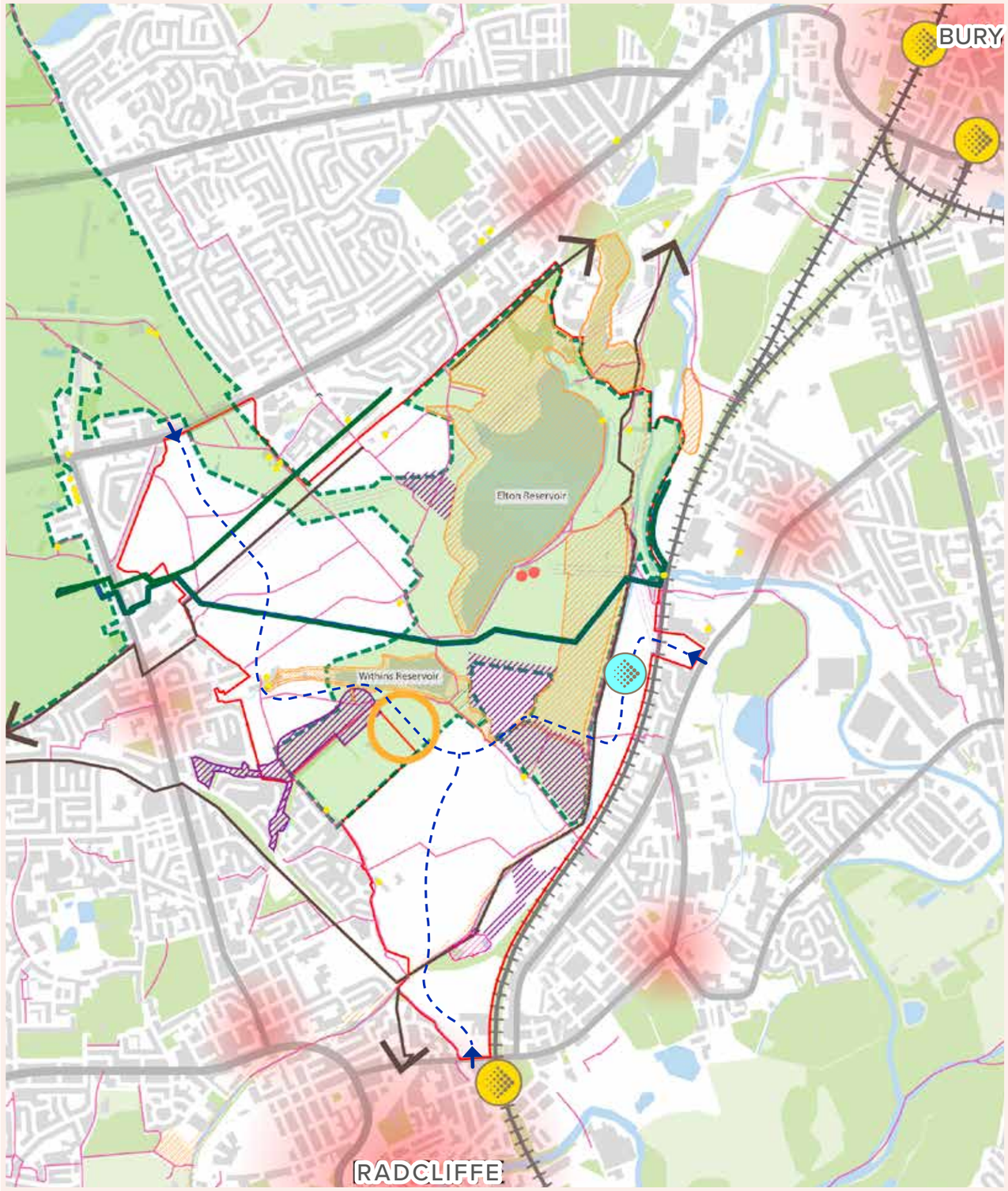
Retail, Services, Education, Community & Health Facilities

Together, Radcliffe and Bury ensure that residents and visitors have access to a comprehensive range of shopping, leisure, healthcare, and community services within a convenient distance of the site.

- Opportunity to create active travel **connections to existing services** beyond the site boundary and to **support the local economy**;
- Opportunity to provide new, more **accessible local facilities on site** and meet the needs generated from the development without creating the need to travel by car; and
- Opportunity to provide **new and/or expanded education and health facilities on site and/or in the surrounding area** to meet the needs generated from the development.

Key

- Site Boundary
- Utilities - Linear Greenway Opportunities
- Overhead Powerlines
- Grade II Listed Buildings
- Non-Designated Heritage Assets
- Public Rights of Way
- Existing Cycle Routes
- Town Centre
- Existing Metrolink Stop
- Green Belt
- SBI Grade A
- SBI Grade B
- SBI Grade C
- Archaeological Sites
- Access Points
- Potential Link Road
- Proposed Metrolink Stop



Opportunities Plan

Chapter Four

Vision & Objectives

Vision Statement

The Elton Reservoir site represents a significant opportunity to shape a thriving, **sustainable new community** within Bury. Its connectivity with existing and new **Metrolink stops**; new an enhanced bus services; and an extended network of **safe and direct routes for walking** and wheeling will enable sustainable movement and reduce reliance on cars.

Through the delivery of **new homes, local amenities,** and inclusive, vibrant community spaces, the development will play a central role in **boosting the local economy** and enhancing quality of life for residents of Bury, Radcliffe and the wider area.

This growth will be supported by the creation of essential social infrastructure including **schools and recreation facilities,** alongside new strategic highway infrastructure and sustainable transport connections. Together these promote **healthy, active lifestyles** encouraging **environmentally responsible living.**

The vision for the site is shaped by a **long-term commitment to placemaking** and the wider strategic ambitions set out in the Places for Everyone Joint Development Plan. At the core of this vision are seven key strategic objectives, which will guide the development and ensure that it delivers **meaningful, lasting benefits.**

Around
3,500
High Quality New Homes

Biodiversity
Enhancement

Over
160
ha of Open Space

1
New Primary School

3
New Local Centres

Active Travel
Routes Network

Recreation
Facilities

New Metrolink
Stop at Warth Fold

Strategic Objectives

1 Sustainable New Homes

Deliver a **sustainability located,** landscape-led development of around **3,500 high-quality homes** integrated within nature and knitting into its surroundings. Every element of the development will reflect a commitment to **social, environmental and economic sustainability.** The proposal takes account of all constraints; retains natural and built features of value wherever possible; minimises adverse impacts of development; and includes appropriate mitigation for unavoidable impacts.

2 Connectivity

Integrate the new development into the existing public transport network with the provision of a **multi-functional link road,** also serving as a **bus route and active travel route,** connecting neighbourhoods to the existing and new **Metrolink stops,** located on the eastern boundary, offering a 25-minute connection to Central Manchester.

A comprehensive **active travel network** will seamlessly connect into the existing network of pedestrian and cycle routes, ensuring safe, convenient, and **sustainable options for local travel,** encouraging residents to choose walking, cycling, and public transport as their primary means of movement.

3 Inclusivity

Create a truly **inclusive place,** from providing accessible green spaces and streets that are open and welcoming to all, to neighbourhoods designed to foster **community and interaction.** A **varied mix of homes** of various tenure, type and sizes will be delivered to cater for all demographics. These will be complemented by urban spaces that serve as a social focal point where communities can come together, meet and share.

4 Economic Growth

Support economic growth and regeneration of the area, including through integration with the existing urban area, increasing local spending, and providing new and improved infrastructure. Harnessing the growth and economic benefits of the project to attract further investment and **strengthen the local economy.** Contribute to the sustainability and resilience of the local economy by optimising local employment opportunities throughout all stages of development including by offering dedicated training and apprenticeship programmes.

5 Strategic partnerships

Facilitate the implementation of **long-term management** of the future development through **strategic partnerships** with governance structures, local businesses and communities, whilst establishing **community spirit and sense of ownership** amongst residents.

6 Health and Wellbeing

Create an environment where the **promotion of health and wellbeing** is fundamental to the design, supported by a network of active travel routes that offers easy and frequent **access to green spaces,** and direct links to existing and new local amenities and community hubs. Ensure that everything residents need, from schools and shops to parks and healthcare, will be within easy reach, promoting **healthier lifestyles** and fostering a **strong sense of community.**

7 Climate Resilience and Nature Recovery

Enhance **climate resilience** whilst creating spaces that people can enjoy and where nature can flourish. **Support biodiversity** by protecting areas of importance and safeguarding the most important existing ecological assets.

Integrate retained landscape features within a network of **interconnected green corridors** that manage water and support wildlife. Enhance **key habitats** by bolstering woodland and hedgerows and by connecting them to the wider natural environment beyond the site boundary.

Chapter Five
Strategic Design Principles

Strategic Design Principles

1 Connecting & Protecting Existing Assets

The masterplan will provide a significant green corridor which remains within the Green Belt and provides a strategic amount of new, high quality and publicly accessible open space.

Enhancement of the existing assets of Elton and Withins Reservoirs and the Manchester, Bolton and Bury Canal will create a network of blue infrastructure for recreation, tourism, leisure and nature.



2 Creating a Connected Nature Network

Green corridors will connect the parkland to the wider green nature network beyond the site boundary. These corridors will ensure that ecology, drainage features and active travel routes work together to create quality green spaces that act as nature super highways, connecting north to south and east to west.



Strategic Design Principles

3 Facilitating a Mosaic of Multi-Functional Landscapes

The masterplan will preserve nature whilst creating green spaces for both existing and new communities to enjoy. A network of multifunctional landscapes will provide spaces where both people and nature can flourish.

Recreation facilities along with active travel routes will be sensitively designed and located to minimise impact on existing habitats and vegetation.



4 Knitting into a Wider Active Travel Network

The Elton Reservoir site will be a place that actively supports health and wellbeing with a network of sustainable and safe active travel routes throughout the site, connecting into pedestrian and cycle routes beyond the site boundary.

Active travel routes will be accessible to all to ensure inclusivity, and that existing and future site assets are available to the existing and new communities.



Strategic Design Principles

5 Promoting Sustainable Modes of Transport

Radcliffe Metrolink stop is adjacent to the southern boundary of the site and a new Metrolink stop will be located at the eastern gateway. The new and existing stops will provide strategic transport connections and bus interchange, alongside the new bus through the development. A travel hub will also be located at the new Metrolink stop, providing a cycle hub, car club and other sustainable modes of transport. This will promote healthy and active lifestyles reducing reliance on private vehicles. Active travel routes will provide direct access to the Metrolink stops to further facilitate and encourage their use.



6 Supporting development with key Infrastructure

Three access points can be delivered from the A58, Bury Road and Spring Lane which will each connect via the multi-functional link road providing access through the site for pedestrians, cyclists, buses and other vehicles. The site will also offer multiple other access points for pedestrians and cyclists around its perimeter. With connections north, south and east, the link road will provide both a strategic alternative route function through the site as well as local access within it for vehicular and non-motorised modes. The link road may also incorporate new utilities infrastructure to service all phases of development.



Strategic Design Principles

7 Delivering a Rich Mix of Neighbourhoods

New neighbourhoods will be created with distinct characters. Lower density housing will be nestled within the heart of the masterplan, overlooking the waterscape. Higher density parcels will be located to the east, surrounding the new Metrolink stop and the associated amenities.

Other neighbourhoods will act as an expansion of existing development, knitting the proposed new homes into the wider context. This rich mix of neighbourhoods will provide a wide range of new homes and spaces to meet the needs of different sectors of the community.



8 Creating Three Distinct Local Centres

Three distinct local centres will be located in the eastern, western and southern neighbourhoods. These local centres will provide a diverse range of amenities and services, including later living, potential extra care, community facilities and employment.

A primary school will be provided in proximity to the north-western local centre. This will enable residents to access facilities within walking distance, reducing the need to travel.



Chapter Six

Masterplan

Masterplan

The masterplan has been informed by a significant evidence base of surveys of the site and its surroundings. These have been undertaken by a range of specialists and have been reviewed by relevant experts within the Council and consultees including Transport for Greater Manchester (TfGM); the Greater Manchester Ecology Unit (GMEU); the Greater Manchester Archaeological Advisory Service (GMAAS); and the Environment Agency (EA).

The evidence base has enabled the identification of the key characteristics, constraints and opportunities presented in section 3. Understanding these has shaped the vision and strategic objectives for the proposed development as set out in section 4 and the strategic design principles summarised in section 5.

This section of the ERDF introduces the masterplan for the site. It sets out how the proposals apply the vision, objectives and design principles to create the essential elements of a high quality and highly sustainable new place.

The masterplan illustrates the spatial principles that will shape the proposed place and identifies the key infrastructure that will be needed to support it. It applies minimum housing densities in accordance with relevant policies. It defines a range of character areas which will accommodate different development needs and create a distinctive sense of place and community.

The ERDF relates to proposals for:

- ✓ **Around 3,500 homes** including a broad mix of house types and sizes to include **affordable homes;** accommodation for older people, plots for custom and self-build homes, and higher density homes in the most accessible parts of the site
- ✓ A **strategic link road** connecting the Bury Bolton Road (A58) with Bury Road in Radcliffe and including a connection to Spring Lane in Radcliffe
- ✓ Optimising use of existing and making provision for **new public transport** opportunities including a new **Metrolink stop** and associated Park & Ride facilities in the Warth Fold area and new bus services
- ✓ Measures to **encourage active travel** including attractive routes for walking and wheeling; safe and convenient highway crossings; and high-quality cycle parking and storage at key nodes
- ✓ Other necessary highway, footway and crossing **improvements in the surrounding area**
- ✓ A two-form entry **primary school** (with potential to be extended to three-form entry if needed)
- ✓ A **new secondary school** (the Star Radcliffe Academy School is under construction on the Coney Green site in the south of the masterplan area)
- ✓ **Three local centres** which include a range of appropriate **retail, health and community facilities.** These will be within the proposed residential areas (Mill Quarter and Coney Folds) and adjacent to the new Metrolink stop
- ✓ Replacement of existing **recreation space** at Warth Fold with a facility of at least equivalent quantity and quality and in a suitable location
- ✓ A significant **green corridor** which remains within the Green Belt and provides a strategic amount of new, **high quality and publicly accessible open space**/parkland and a network of multi- functional green and blue infrastructure
- ✓ Provision for **biodiversity net gain** including taking appropriate account of SBIs at Elton Reservoir; Manchester, Bolton and Bury Canal (east); Elton Goyt; Withins Reservoir; Black Lane Marl Pits; and radcliffe wetlands
- ✓ **Mitigation for potential flood risk**

Masterplan

Access and Connectivity

1. Site access from Bury and Bolton Road
2. Site access from Spring Lane
3. Site access from Bury Road
4. Link Road
5. New Metrolink stop
6. Withins Lane Bridge
7. Active travel routes

Local Centres, Education & Healthcare

8. Redvales Works Local Centre
9. Withins Valley Local Centre
10. The Mill Quarter Local Centre
11. Primary School
12. Potential Extra Care
13. Later Living/Retirement Village
14. Potential healthcare facilities

Landscape & Heritage

15. Green Gateway Fields and Sports Pitches
16. Elton Greenway
17. Elton Shores
18. Heritage Park
19. Canal Side
20. Wetlands
21. Sailing Club
22. Old Hall Farm



Site Wide Density

The Elton Reservoir site will deliver a broad range and mix of homes as required by Policy JPA7 of PfE. The masterplan within this ERDF has applied the minimum residential densities in accordance with PfE policy JP-H4. These reflect higher densities in the most accessible parts of the site – especially close to the existing and proposed Metrolink stops and Radcliffe Town Centre – as shown on the adjacent masterplan.

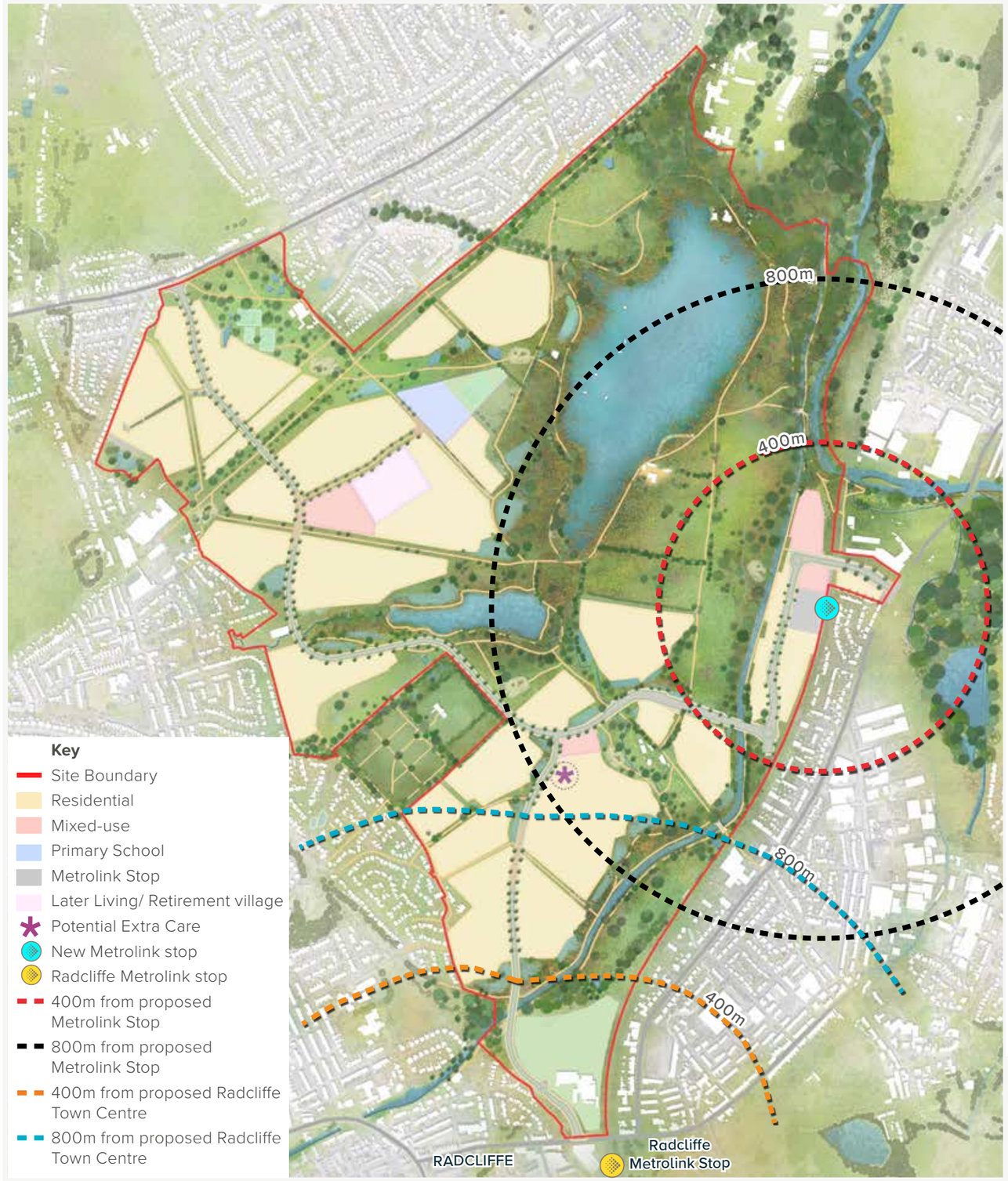
Applying these densities means that there is:

- an average of 35 homes per hectare to the north and west of the reservoirs. This will include elements of lower density adjacent to existing housing and adjacent to the retained Green Belt; and
- increased densities to the south and east of the reservoirs especially closest to the existing and new Metrolink stops where Policy JP-H4 seeks a minimum of 70 homes per hectare.

The indicative proposals show how the site has potential to deliver around 3,500 homes in accordance with Policy JPA7.

The proposed densities are indicative and the final amount of development and layout of each parcel will be subject to detailed design consideration at future planning application stages.

Planning applications will be expected to demonstrate that the design and density of development proposed is appropriate having regard to matters including relevant planning policy; townscape, landscape and heritage considerations; local market need and demand for particular types of homes; and design considerations including the interface with existing homes; the Green Belt; and the reservoirs and their settings.



Masterplan with walking distances from Radcliffe town centre and new Metrolink stop

Character Areas

The masterplan proposes six different character areas:

1. Spen Moor Meadows
2. The Mill Quarter
3. Elton Waterside
4. Coney Folds
5. Withins Valley
6. Redvales Works

These character areas are outlined on the adjacent plan and are described in the following pages. The new neighbourhoods will provide an array of facilities, including three village centres, one Primary School and one retirement village.

Each area will be designed to reflect its unique location and incorporate landscape, ecology and heritage features.

The design of each character area will also be underpinned by key placemaking principles that will give it interest, variety and uniqueness. These principles will be reflected and explored further at the next design stages.



Character Areas Location Plan

Spen Moor Meadows

The Green Gateway

Spen Moor Meadows will be the western gateway of the site, with access gained from Bury and Bolton Road.

Development parcels will be set back from the site entrance to create a landscape arrival. Built form will mark the gateway through the presence of larger dwellings acting as marker buildings.

Parcels in this area will have to be developed around a number of site constraints, including a mine shaft (with 2 m offset), a low pressure gas main running east-west, existing hedgerow lines and PRoW.

A semi-formal character at medium-density will be reflected along the southern and eastern edges, and along the link road.

A variety of sports, recreation and leisure opportunities will feature within the green spaces south and east of this character area.

Key Design Principles

Transport & Connectivity

- ✓ Signal controlled link road access junction with A58 Bury and Bolton Road, incorporating controlled pedestrian crossing facilities and CYCLOPS cycle provision providing direct access to Active Travel routes either side of the link road

Landscape

- ✓ Create a green and welcoming western entrance to the development linking through to the greenway
- ✓ New formal sports pitches nestled into the existing landscape structure with access from Bury & Bolton Road
- ✓ Retain existing SBI and recreational routes

Built Form & Density

- ✓ Lower density located along the western edge to respond to existing development
- ✓ Lower density along the eastern edge fronting onto Green Belt to create softer edge
- ✓ Medium density along the link road and along the southern edge to respond to the linear nature of the Elton Greenway, and to transition towards higher density areas of the mixed-use



Key

- Link Road (including active travel)
- Secondary Road/Access Road
- Public Right of Way
- Proposed Active Travel Route
- Residential Parcel









The Mill Quarter

Community Gateway to the Everyday

The Mill Quarter will feature mixed-use amenities, retirement village, community sports and recreation, within medium-high density development.

It will be characterised by a series of linear parks and active travel routes connecting the new community to the wider context, along with promoting non-vehicular movement into the site.

The built form will reflect the linearity of the adjacent green corridors through more formal, regular terrace and semi-detached dwellings.

For the higher density areas around the local centre and retirement village, a more varied building typology will feature more informal courtyard spaces and mews/shared streets.

Key Design Principles

Transport & Connectivity

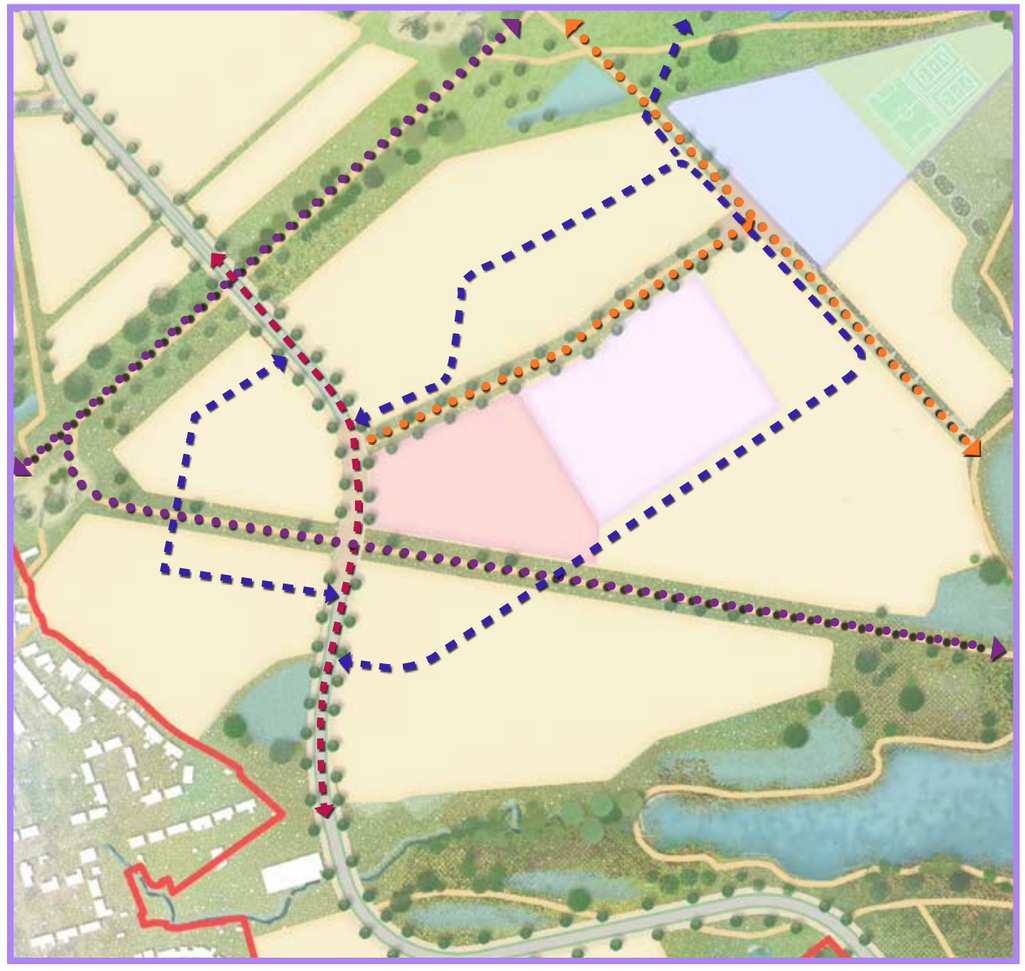
- ✓ Continuation of link road with adjoining Active Travel route provision assisting accessibility to school

Landscape

- ✓ New linear greenway integrating the existing Bolton-Bury Cycleway
- ✓ Greenway to include play, sports and productive landscapes
- ✓ Gateway amenity space with neighbourhood play at key nodes

Built Form & Density

- ✓ Higher density mixed-use local centre with retail and services at ground floor and residential units above
- ✓ Retirement village adjacent to mixed use
- ✓ Medium/high density residential development around mixed use centre, along link road and towards Primary School
- ✓ Lower density residential development along boundary with existing dwellings
- ✓ Lower density fronting onto Green Belt to create softer edge



Key

- Link Road (including active travel)
- Secondary Road/Access Road
- Public Right of Way
- Proposed Active Travel Route
- Residential Parcel
- Mixed-use Parcel
- Retirement Village
- Primary School









Elton Waterside

Homes Nestled within Waterscape

Elton Waterside will be located at the heart of the scheme, where the green and blue landscape converge in a proposed Nature Park on land around the reservoirs, which will include wetlands, amenity open space, recreation areas and active travel routes.

Mindful of the undulating topography, the reservoirs' frontages offer opportunities for long range views over the Nature Park and wetland, with homes nestled within landscape clusters.

Homes in this location will respond sensitively to the Green Belt and SBI areas, with low density homes creating a softer development edge.

The Primary School will also be located in this area. The playing fields will retain a sense of openness and views across the landscape and reservoir.

Key Design Principles

Transport & Connectivity

- ✓ Link road alignment continues south of Withins Reservoir which avoids potential ecological and environmental impacts relating to nesting birds and waxcaps which a central alignment between the reservoirs would adversely affect

Landscape

- ✓ Elton and Withins Reservoirs to be enhanced for recreational use. Proposed 'Nature Park' hub linked to the school and proposed Neighbourhood play area
- ✓ New and improved footpaths and cycleways to enhance accessibility
- ✓ Dual use sports pitches located at proposed primary school
- ✓ Existing semi-natural landscape character retained and enhanced with SuDS ponds, wetlands and naturalistic planting

Built Form & Density

- ✓ Lower density development fronting the Green Belt, featuring large detached family homes sat in landscape
- ✓ Medium density development closer to Primary School and mixed-use centre
- ✓ Medium development in the parcel east of the reservoirs, located within 800m from the Metrolink stop. Parcel also located within the SBI
- ✓ Predominantly 2 storeys buildings with occasional 2.5 - 3 storeys marker buildings











Coney Folds

Knitting into the Existing Context

Inspired by the agricultural heritage of the site, Coney Folds will be an extension to the existing residential area of Radcliffe.

This neighbourhood will grow around the East Lancashire Crematorium and Radcliffe Cemetery, and around existing non-designated heritage assets to be retained.

Medium density housing will knit into the existing context of the area forming back to back relationships with existing homes and pedestrian links connecting into the wider community. Future development will respond sensitively to each boundary condition, ensuring existing residents retain appropriate levels of amenity.

Frontage onto the link road will be formal in character, with a linear building line and consistent rhythm.

Key Design Principles

Transport & Connectivity

- ✓ The link road alignment routes alongside the north-eastern boundary of the Crematorium before providing a southern spur towards Coney Green and the Star Academy school which is currently under construction
- ✓ The junction interchange between the link road spurs will likely comprise a priority T junction arrangement with ghost island facility. Both the eastern and southern legs of the link road would continue to provide associated Active Travel routes
- ✓ Layout will encourage connectivity and integration with Radcliffe town centre including the Metrolink stop

Landscape

- ✓ Existing PROW retained
- ✓ New circular recreational routes around Withins Reservoir
- ✓ New Heritage Park with Neighbourhood play facilities and art/interpretation of archaeological interest. An opportunity to connect to the Irwell Sculpture Trail

Built Form & Density

- ✓ Lower density located along the western edge to respond to existing development, green belt and heritage asset
- ✓ Higher density located along the link road, closer to mixed-use and within 800m from Metrolink stop
- ✓ Predominantly 2 - 2.5 storeys buildings with up to 3 storeys marker buildings and along the link road



Key

- Link Road (including active travel)
- Secondary Road/ Access road (indicative)
- Public Right of Way
- Proposed Active Travel Route
- Residential Parcel
- Mixed-use Parcel
- Potential Extra Care









Within Valley

A Multi-functional Landscape Overlooked by Homes

Within Valley will have a range of high and medium-density housing with a local centre, overlooking a rich range of biodiverse landscapes and waterscapes.

The character along the nature corridor will be enclosed with a range of medium density homes that overlook the canal creating a strong formal frontage. Development along the brook corridor will be semi informal edge characterised by consistency, order and symmetry.

This neighbourhood will inspire a sense of discovery as one meanders through a series of green corridors and spaces leading to the canalside.

The landscape edge will provide various leisure and recreation opportunities across multi-functional basins, the brook and canalside.

Key Design Principles

Transport & Connectivity

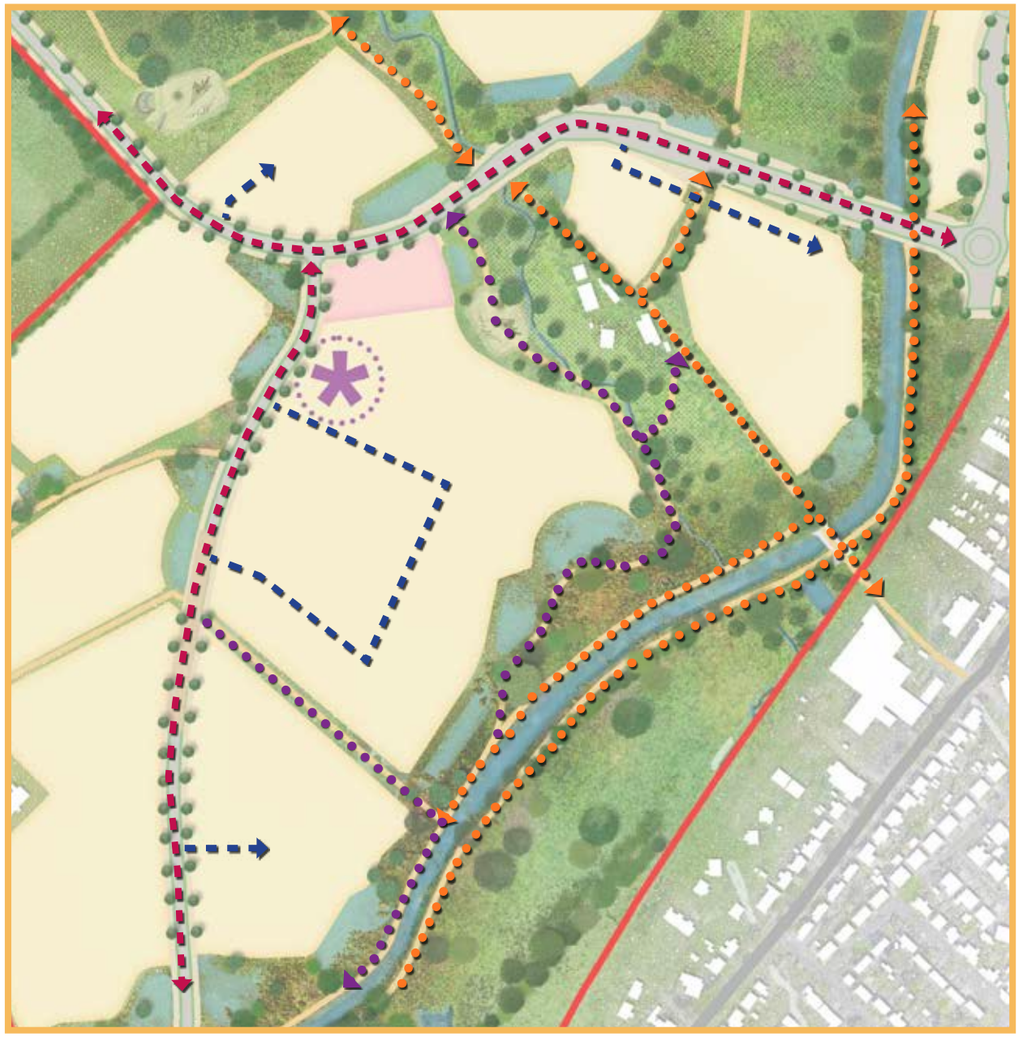
- ✓ The Within Valley eastern and southern components of the link road provide crossings of the canal via new bridge structures with associated Active Travel provision
- ✓ Layout will encourage connectivity and integration with Radcliffe town centre including the Metrolink stop

Landscape

- ✓ The canal will be enhanced for active travel and connected to the proposed Metrolink stop
- ✓ New attenuation ponds and wetland adjacent to the canal will create an attractive waterside environment integrating new leisure routes and play
- ✓ Neighbourhood play located within amenity green space close to the Neighbourhood centre

Built Form & Density

- ✓ Higher density located around mixed-use and within 400m from the existing and new Metrolink stop
- ✓ Medium/high density within parcels fronting the canal and within 800m from the existing (Radcliffe) and new Metrolink stop
- ✓ Higher density mixed-use local centre with retail and services at ground floor and residential units above
- ✓ Predominantly 3 storeys buildings with up to 4 storeys marker buildings



Key

- Link Road (including active travel)
- Secondary Road/ Access road (indicative)
- Public Right of Way
- Proposed Active Travel Route
- Residential Parcel
- Mixed-use Parcel
- Potential Extra Care









Redvales Works

Where Nature Meets Urban

Redvales Works will represent the eastern gateway of the site. It will be defined by mixed-use, high- density development, overlooking the canal and parkland beyond.

Inspired by the site's colliery heritage, the architecture will respond through its material palette and robust built form. Development in this location will have a regular building line and rhythm to reflect linear form of the parcel.

The opportunity to integrate the Metrolink stop within the public realm will be considered through the creation of a community square which provides 'spill-out' spaces and places for social interaction.

Key Design Principles

Transport & Connectivity

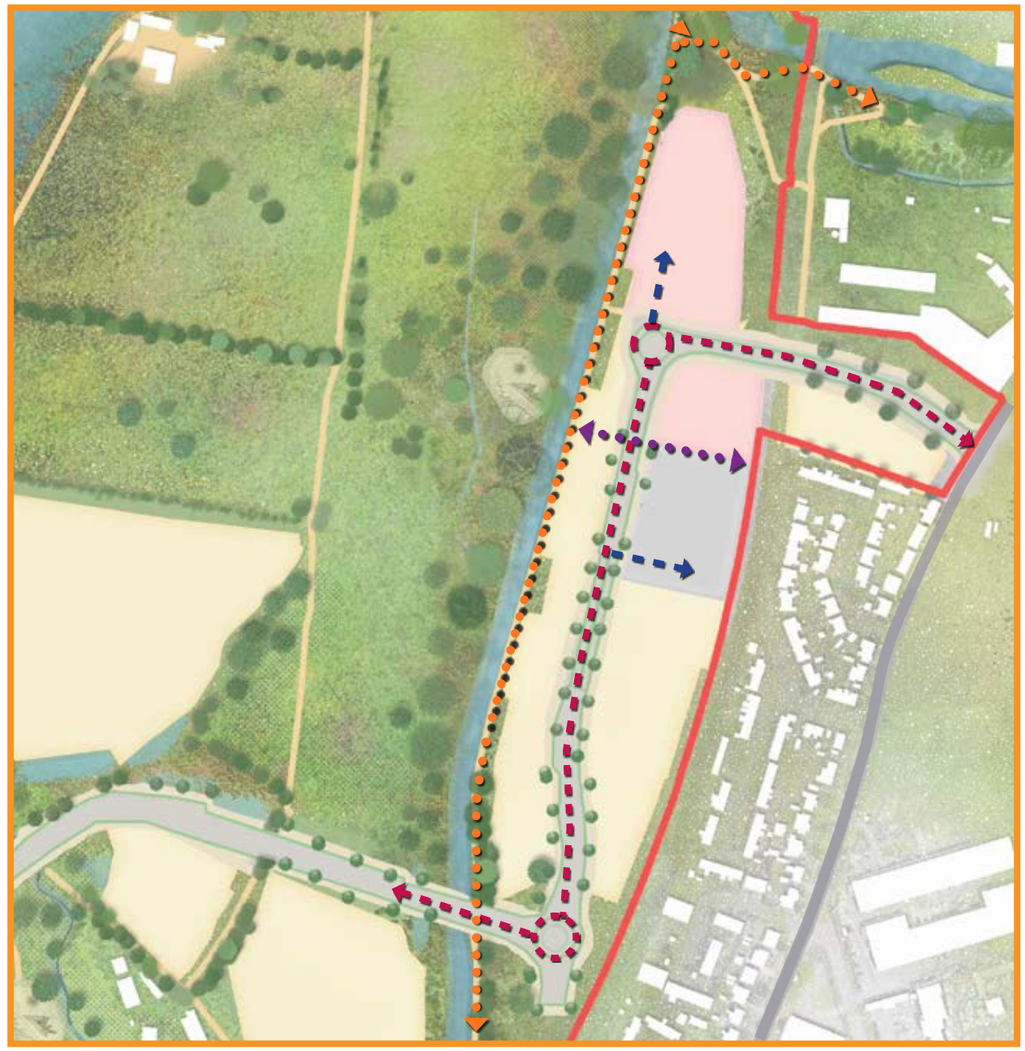
- ✓ The link road provision within this part of the Site would have a different character than other sections, incorporating a lower (20mph) design speed to aid pedestrian and cycle movement close to the Metrolink stop and Travel Hub area. This location would have the highest density of dwellings combined with mixed use development with frontage activity
- ✓ The link road would also provide access to the new Metrolink facility

Landscape

- ✓ Improved pedestrian / cycle routes along the existing towpath connecting to the proposed Metrolink station
- ✓ Enhanced urban canal character to the east – a sharp contrast to the attractive green grasslands of the western SBI
- ✓ Retain existing PROW network and protect valuable habitats
- ✓ Significant boulevard tree planting to the link road and higher density development areas

Built Form & Density

- ✓ Higher density mixed-use parcels with retail and services at ground floor and residential units above
- ✓ Higher density residential parcels within 400m from new Metrolink stop
- ✓ Up to 4 storeys buildings
- ✓ Parking and building typologies to be carefully considered due to constrained parcel sizes and high density



Key

- Link Road (including active travel)
- Secondary Road/ Access road (indicative)
- Public Right of Way
- Proposed Active Travel Route
- Residential Parcel
- Mixed-use Parcel
- New Metrolink Stop









Chapter Seven

Development Principles



Design

Introduction

The following Development Principles will inform the parameters for the development of the Elton Reservoir site and should be considered as part of any future planning applications. Bury Council will require all planning applications to include supporting information that demonstrates how the development proposed addresses relevant development plan policies, which are identified at the start of each section below, and incorporates these Development Principles.

Whilst the masterplan for the site is indicative, any significant deviation from the Development Principles must be justified by clear, robust and agreed evidence that demonstrates why an alternative approach is required, with reference to the Vision and Objectives set out in Chapter 4.

Design

Development plan policies of most relevance: PfE Policies JPA7: Elton Reservoir; JP-P1: Sustainable Places; and JP-G6: Urban Green Space

Development of the site should deliver high-quality, inclusive and sustainable places particularly in terms of:

- Responding positively to local context and character
- Place-making and urban design quality
- Climate responsiveness and resilience
- Respecting and responding to the natural environment

All development on this site should adopt a design-led approach from the outset, ensuring that design considerations shape the form, layout, scale and function of development rather than being applied retrospectively.

The following design principles must be incorporated into all development proposals within the site:

Responding positively to and being informed by a thorough understanding of the local context and character, including:

- The site's natural, built and historic environment;
- The local townscape, landscape and setting;
- Established patterns of development, street hierarchy and plot structure; and
- Local materials, detailing and architectural features.

Delivering high-quality and inclusive development that contributes to a distinctive sense of place, particularly in terms of:

- Being visually attractive and distinctive, through architecture, materials and detailing;
- Incorporating distinctive architectural reference points at key gateway locations and arrival points to assist with legibility;
- Ensuring that development blocks, individual buildings, streets and spaces function in a safe, inclusive and accessible way that creates a legible sense of place;
- Ensuring that the development makes an effective and efficient use of land and natural resources;
- Using high-quality, durable and sustainable materials that are easily maintained and resistant to the effects of ageing, weather and climatic conditions;
- Creating a fully connected community that enables effective, inclusive and safe patterns of movement with a clear hierarchy of routes within and around the development that promotes walking, wheeling, cycling and the use of public transport;
- Ensuring that the development is accessible to people with disabilities, the elderly and those with children;
- Being safe and secure by minimising actual and perceived opportunities for crime, anti-social behaviour, disorder and terrorism;
- Making appropriate provision for gardens and/or outdoor amenity space that reflects the type and size of each new dwelling;
- Making provision for high-quality green infrastructure, the provision of wildlife habitats and other wildlife-friendly features within the development;
- Ensuring opportunities are taken to minimise adverse impact and positively integrate and enhance existing natural assets, such as rivers, ponds and wetlands, into the development, where appropriate;
- Ensuring that the design follows principles of mitigation hierarchy, i.e. avoid; mitigate; compensate;
- Promoting health and wellbeing; and
- Considering opportunities for the incorporation of public art.

Delivering development that is resilient to the ongoing and predicted impacts of climate change, particularly by:

- Incorporating low carbon materials to reduce the embodied carbon of new development;
- Ensuring opportunities are taken to optimise the effectiveness of solar energy installations through the site layout, building orientation and design;
- Providing high quality sustainable travel options for day-to-day needs via convenient walking and cycling routes and catchments and easy access to public transport;
- Incorporating appropriate landscaping and urban greening;
- Ensuring that the design includes an assessment of and response to existing hydrological characteristics to ensure the sustainable management of water assets and identified sources of flood risk in the design of a site; and
- Sustainable drainage is considered at the outset and throughout the design process so that it is integrated with the site landscaping, including tree-lined streets.

Housing

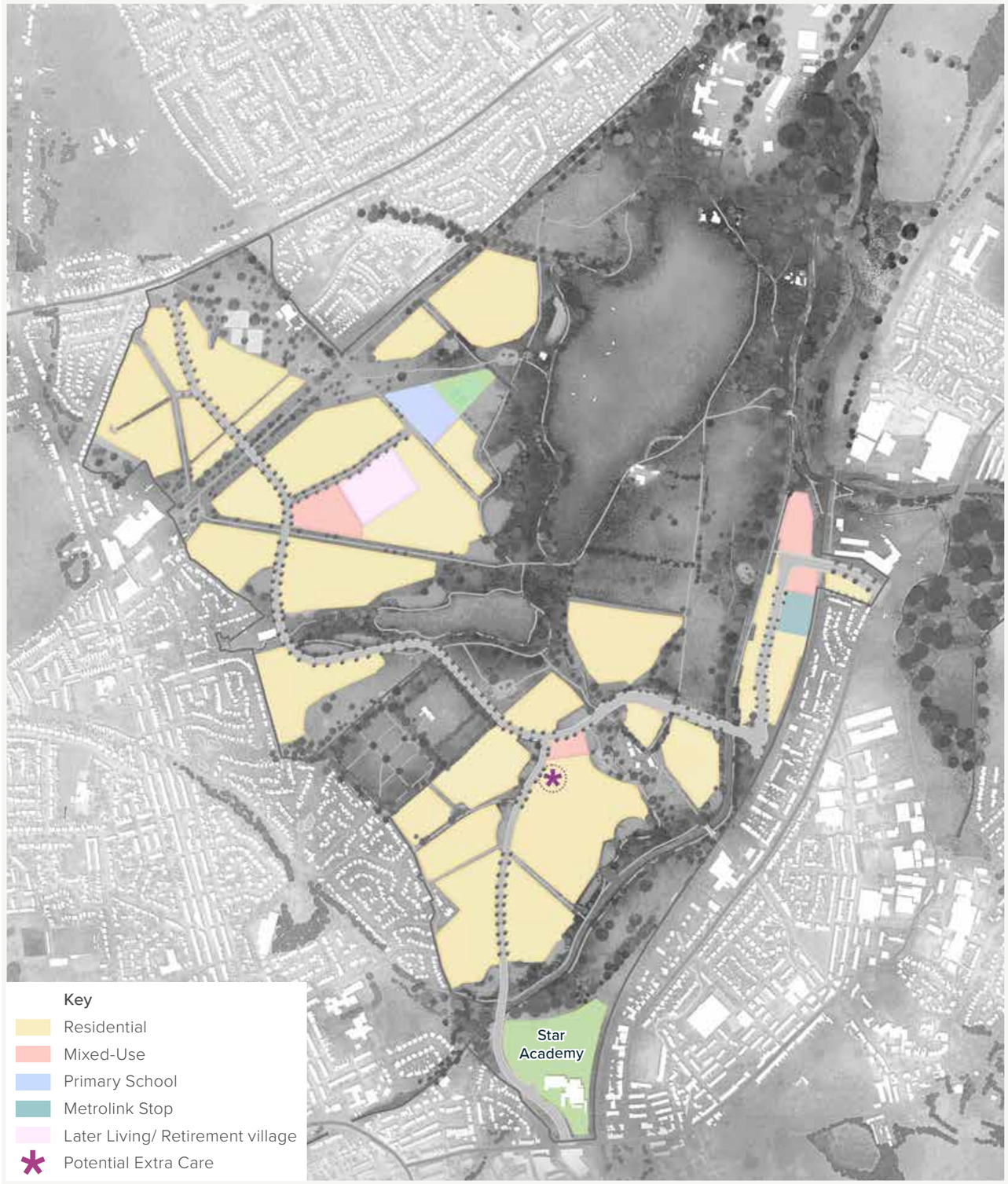
Development plan policies of most relevance: PfE Policies JPA7: Elton Reservoir; JP-H3: Type, Size and Design of New Housing; and JP-H4: Density of New Housing

Policy JPA7 provides that up to 3,500 new homes should be delivered to diversify the type of accommodation across Bury and Radcliffe.

Planning applications for the site will identify the precise number of dwellings that will be provided.

Development should offer a broad mix of house types and sizes including provision for families, first-time buyers and affordable housing. This should include provision for custom and self-build plots (subject to local demand having regard to the Council's self-build register and other relevant evidence), as well as specialist and older persons housing, having regard to the latest Housing Needs and Demand Assessment.

All new dwellings must comply with the nationally described space standards and be built to the 'accessible and adaptable' standard in Part M4(2) of the Building Regulations unless specific site conditions make this impracticable. The delivery of homes to meet the optional standard in Building Regulations Part M4(3) of the Building Regulations (or any subsequent revisions to the standard) is encouraged.



Land Uses Plan

Housing

Affordable Housing

Criterion 3 of PfE Policy JPA7 states that development at the site will be required to make provision for affordable housing in accordance with local planning policy requirements, equivalent to at least 25% of the dwellings on the site and across a range of housing types and sizes (with an affordable housing tenure split of 60% social or affordable rented and 40% affordable home ownership).

Development proposals should include the provision of affordable housing in line with the requirements of PfE Policy JPA7, across a range of house types, sizes and affordable tenures, and have regard to the latest Housing Needs and Demand Assessment. It is envisaged that 25% of homes will be affordable. Affordable housing provision will be sought on site unless exceptional circumstances can be demonstrated that would warrant off-site contributions. Off-site contributions should provide the number of units that would have been delivered on site. Contributions should be in the form of units erected off site, the provision of land to build units or as a last resort, be in the form of a financial contribution (commuted sum).

The affordable homes should be fully integrated with the development and dispersed throughout the site, unless there are specific circumstances that warrant otherwise. They should be indistinguishable from the market housing and built to the same specifications (i.e. not separate house types for affordable homes), unless there are particular reasons not to do so (e.g. if there is a specific requirement from a Registered Provider).

Care Home/Retirement Village

Provision should be made for specialist and older people's housing to contribute to meeting identified needs in the latest Housing Needs and Demand Assessment. Specialist and older people's housing should be in an appropriate and deliverable location to meet the needs of future residents.

Character and density

The density and character of new residential development will be shaped by:

- Characteristics, constraints and opportunities at different locations, both within the site and within the surrounding context; and
- The need to deliver sustainable forms of development including efficient use of land, management of environmental impact and promoting travel by non-car modes.

The approach to residential density should align with PfE Policy H4, with the highest densities delivered in the most accessible locations. Development should maximise the opportunity to create sustainable homes in walkable neighbourhoods.

To optimise densities within the site, residential uses will also be acceptable, in principle, on the upper floors of retail and community uses.

Such differentiation in density is essential to help create a varied mix of residential forms and typologies, helping to ensure a choice of housing while delivering an efficient and sustainable use of land.

Access, Highways & Movement

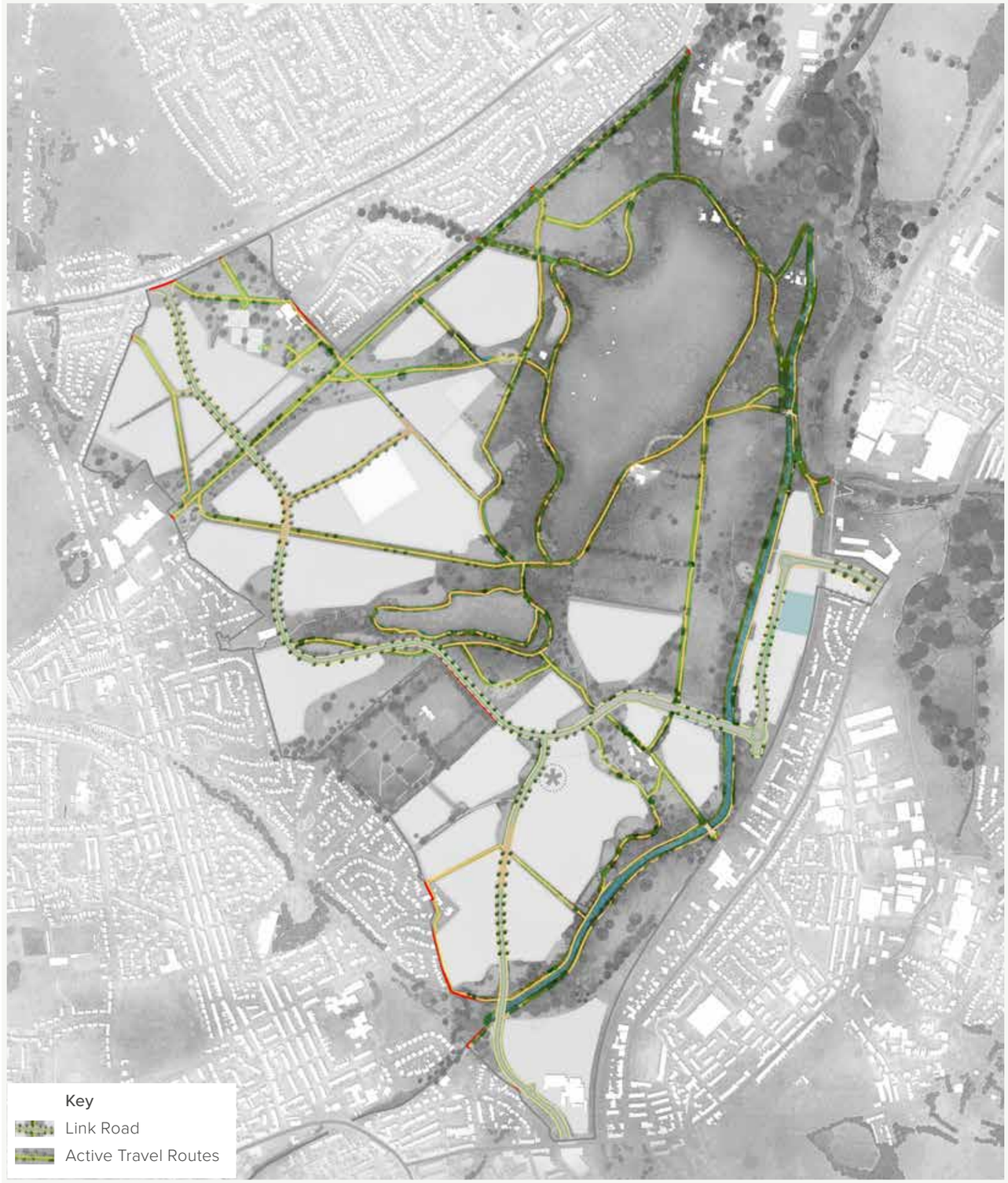
Development plan policies of most relevance are: PfE Policies JPA7: Elton Reservoir; JP-C1: An Integrated Network; JP-C5: Streets for All: and JP-C8: Transport Requirements of New Development; the Greater Manchester Streets for All Design Guide; and Bury Parking Standards

Development at the Elton Reservoir site represents a significant opportunity to optimise travel using sustainable modes while delivering new strategic highway infrastructure that provides relief for existing parts of the highway network and sustainable access to the site and its new neighbourhoods and facilities.

All development within the allocation should be structured around a clear, coherent movement network that is resilient to an increasing quantum of development over time. This will be a legible and safe network both in its 'incomplete' early phases and incrementally through to final completion.

Development should:

- Deliver a street hierarchy within the site that is in line with local design standards and that is capable of accommodating buses, with provision of bus stops and related infrastructure at optimum locations, and provision for active travel;
- Provide primary routes from the key vehicular access points (as shown on the Access & Connectivity Plan) connecting the development with surrounding area;
- Ensure high quality, convenient, safe and attractive walking, wheeling, cycling and equestrian routes where appropriate, to, from and within the site;
- Provide off-site traffic mitigation measures to enable accessibility and mitigate highways impacts arising from the development; and
- Ensure that flood risk on-site and off-site from highway works is not increased and where possible a betterment is provided.



Access, Highways & Movement Plan

Access, Highways & Movement

Access & Link Road

To connect the Elton Reservoir site with the local highway network, a new multi-functional link road will provide new strategic highway capacity, public transport and active travel routes connecting the A58 Bury and Bolton Road in the north to Bury Road to the east of the site and with an additional strategic connection to Spring Lane, Radcliffe to the south.

With three connections to the existing highway network, the link road will have a strategic function which will help to provide resilience on the existing highway network, and provide routes for investment in public transport and active travel whilst also providing suitable access provision for development at the Elton Reservoir site.

Vehicular Access Points

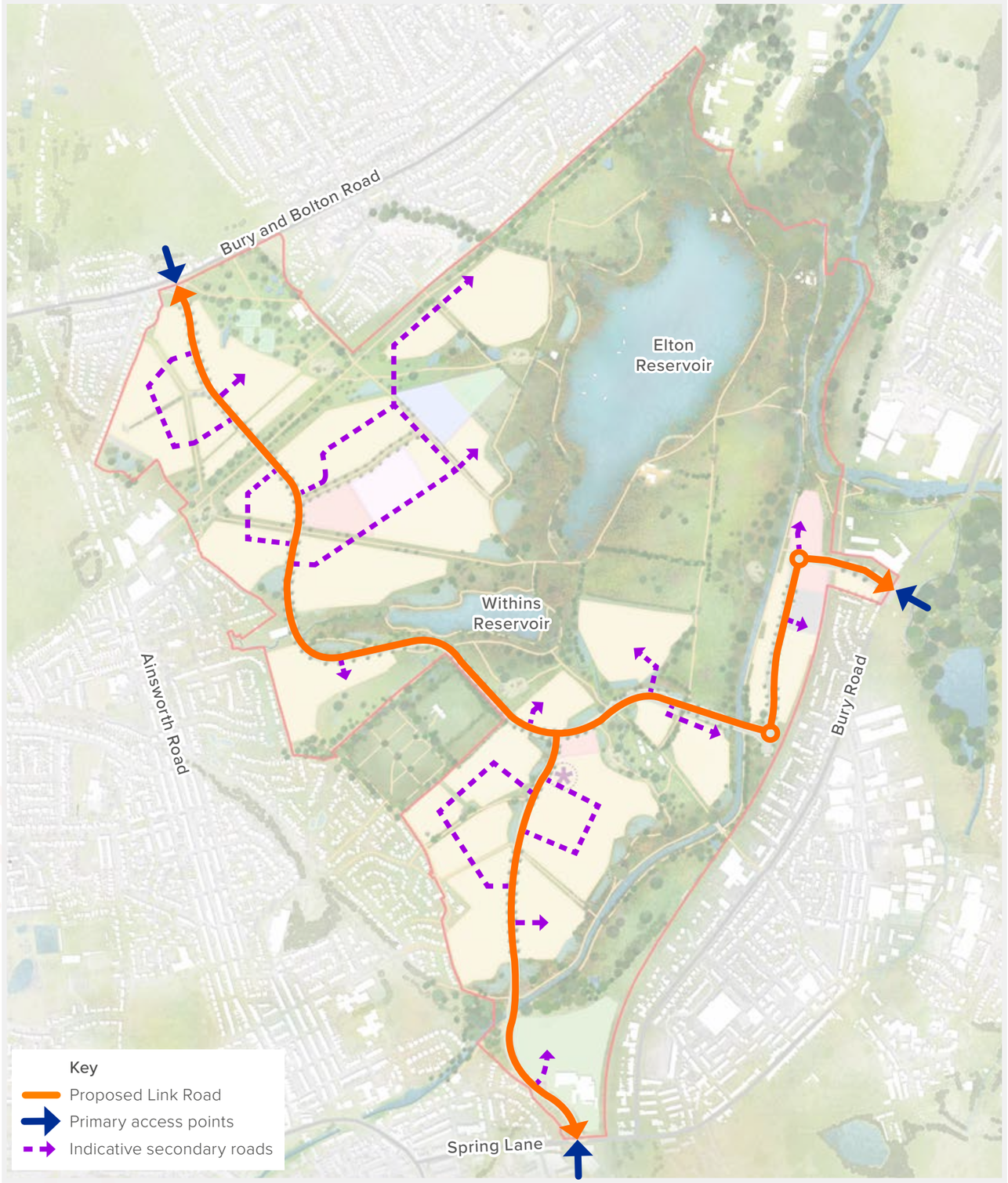
The link road junctions with the existing highway network points will be designed with particular emphasis on pedestrian and cycle provision.

The key access points for the site as shown on the Access & Link Road Plan and the Highways & Off-site Improvements Plan are:

1. A new junction with the A58 Bury and Bolton Road to the north of the site, comprising a three-arm signal-controlled layout with fully controlled pedestrian and cycle facilities.
2. A new signal-controlled junction with Bury Road to the east of the site, which will be provided in conjunction with the new Metrolink stop and connect the stop to the surrounding highway network.
3. A new signal-controlled junction with Spring Lane to the south of the site, comprising a signal control with full pedestrian and cycle provision, as well as maintaining existing access arrangements to the Radcliffe Metrolink car park. This junction has had full regard to the requirements of the Star Radcliffe Academy School, which is currently under construction. This access connects to the link road that connects Bury and Bolton Road to Bury Road.

The potential for additional access points to the development may be considered. These will be subject to detailed highways testing to ensure there is no unacceptable impact on the existing highway network.

Additional points of vehicular access, including for emergency use, may also be acceptable. The design of access junctions should be informed by a Transport Assessment, Traffic Modelling and Traffic Surveys, prepared to support planning applications.



Access & Link Road Plan

Access, Highways & Movement

Elton Reservoir Link Road

The link road is a critical element of the package of infrastructure supporting the full development of the site, given its strategic function, and its role in providing access and facilitating public transport. The scale and location of residential development within the allocation will be co-ordinated with the delivery of key and strategic infrastructure, including the timely delivery of the link road.

Further details regarding this will be determined by Transport Assessments submitted with planning applications which will also be used to update the Infrastructure Delivery and Phasing Strategy for the site.

The link road will:

- provide a strategic function which will help to provide resilience on the existing highway network;
- provide relief for existing parts of the highway network including an alternative route to Bury Bridge for residents in Bury West as well as providing access to the site with its new neighbourhoods and facilities;
- provide a new route for public transport, including bus movement through the site and direct access to the existing Metrolink stop and the proposed new stop;
- provide access to development parcels within the site;
- be designed in accordance with Greater Manchester's Streets for All guidance and LTN1/20 principles to support inclusive and sustainable access;
- provide for the main active travel route and connections throughout site and beyond;
- provide suitable access provision to all development parcels within the Elton Reservoir site; and
- Incorporate SuDS and utilities infrastructure.

Design Characteristics

The link road alignment and design should ensure that the road will serve its purpose as a strategic link road, whilst balancing technical and environmental requirements. Planning applications will be expected to demonstrate how its alignment and design minimises the impact on features such as the Elton Goyt SBI and on wildlife corridors (for example in the design of bridges and culverts).

The link road will comprise an appropriate width carriageway with adjoining segregated active travel provision either side.

To ensure the link road serves its strategic function, as well as providing development access, the principles of the design are that it will:

- Have no frontage/driveway access;
- Have limited side road access provision;
- Provide high quality segregated off-carriageway cycle lane and footpath provision; and
- Provide bus stops within lay-bys (or half lay-bys) if required.

The link road carriageway will play an essential role in respect of public transport, providing new bus routes for the local community which interchange with the proposed new Metrolink stop.

Speed Limit

The link road will have appropriate street lighting and be subject to a 30mph speed limit, with the potential exception being the section close to the Metrolink stop, where the use of a lower 20mph speed limit may be appropriate in order to prioritise active travel and bus connectivity.

The use of a 20mph limit in this area will be assisted by the inclusion of two mini-roundabouts to "gateway" this location, which will naturally slow traffic and help to provide highway transition between the two limits. These proposals are consistent with the place-making objectives for the site and achieving the strategic function of the link road.

Access, Highways & Movement

Highways

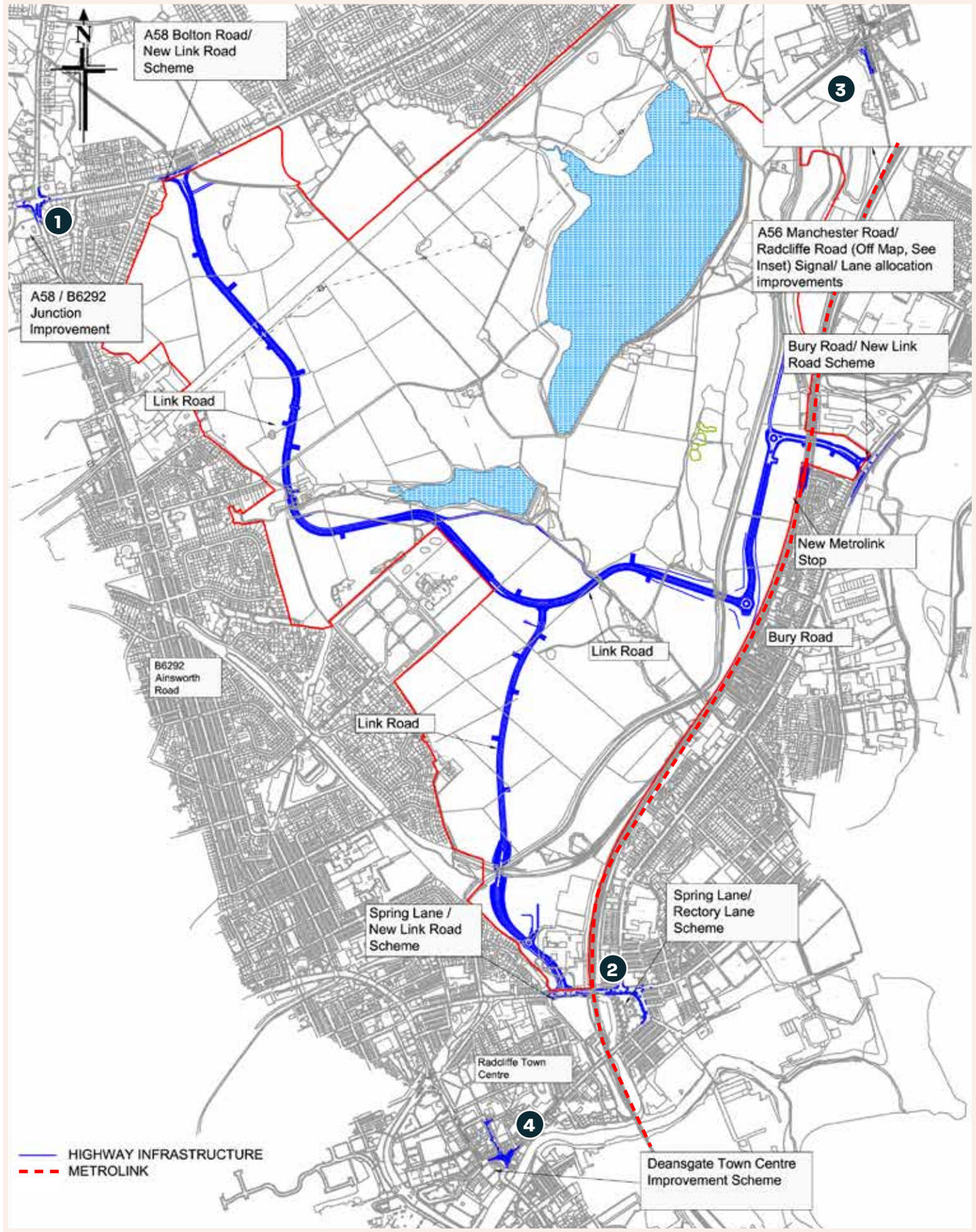
Residential development at the Elton Reservoir site must be integrated with the wider highway network. All development within the allocation will be expected to contribute to the off-site highway works listed in Appendix D of PfE (together with any additional or alternative necessary measures identified through Transport Assessments) to enable accessibility and mitigate highways impacts arising from the development. These include:

1. **The A58/Higher Ainsworth Road/ Starling Road junction**: the improvement is expected to comprise realignment of approach lanes and enhancement of pedestrian crossing provision which will enable signal staging adjustments to improve the operational efficiency of the junction.

2. **At the Spring Lane/Bury Road/Rectory Lane:** a scheme has been identified which links the existing mini-roundabout and priority junctions by way of signal control which enables controlled crossing provision for pedestrians and overall capacity enhancement.

3. **The improvement of the A56 Manchester Road/Parkhills Road/ Radcliffe Road junction:** this is likely to include an extension of the left turn flare on the northbound approach which provides additional capacity.

4. **The Deansgate/Church Street priority junction:** this is expected to be reconfigured to better reflect the north-south movements around Radcliffe town centre.



Proposed Link Road and Off-site Improvements Plan

Access, Highways & Movement

Public Transport

The development within the allocation will be expected to contribute to public transport infrastructure, including:

- Enabling the provision of a new Metrolink stop, Travel Hub, and Park & Ride facilities;
- Optimising the accessibility of new homes to Metrolink and bus services
- The provision for bus services to traverse the site, utilising the link roads; and
- Cycle storage and parking infrastructure including EV charging points.

Parking

Car and cycle parking, including Electric Vehicle (EV) charging facilities will be expected at key public facilities including the Metrolink stop, local centres and school.

Elton Metrolink Stop

Following collaborative working between the Council, TfGM, and the site promoter, a Metrolink stop and Travel Hub is proposed as part of the Elton Reservoir development at Warth Fold. The precise form and content of the stop and Travel Hub are to be agreed as design work progresses.

The delivery of a new stop (and development close to the new Radcliffe stop) will enable higher density of development and uptake by sustainable modes of transport, in turn resulting in a reduced impact on the surrounding highway network.

Its location, as shown in the masterplan, is relatively fixed, subject to further stages of feasibility and design being completed and consideration has been given to its likely scale, components and design. It will serve both the Site and the wider area and will include a new facility.

The intention is to deliver mixed-use development alongside the new Stop and Travel Hub in order to generate activity in the public realm throughout the day while supporting sustainable travel choices.

Consideration is being given to facilities associated with the new Metrolink stop including the type, nature and scale of Park & Ride facilities and travel hub. It is important that public transport infrastructure acts as an interchange between all modes of transport including buses and active travel.

Combined with the existing Radcliffe Metrolink stop (and complemented by bus and active travel measures), the stop provides an opportunity to deliver development across the site with access to sustainable modes of travel for their journeys, reducing the reliance on the private car.



Metrolink Line







Examples of bike share and cycle parking

Access, Highways & Movement

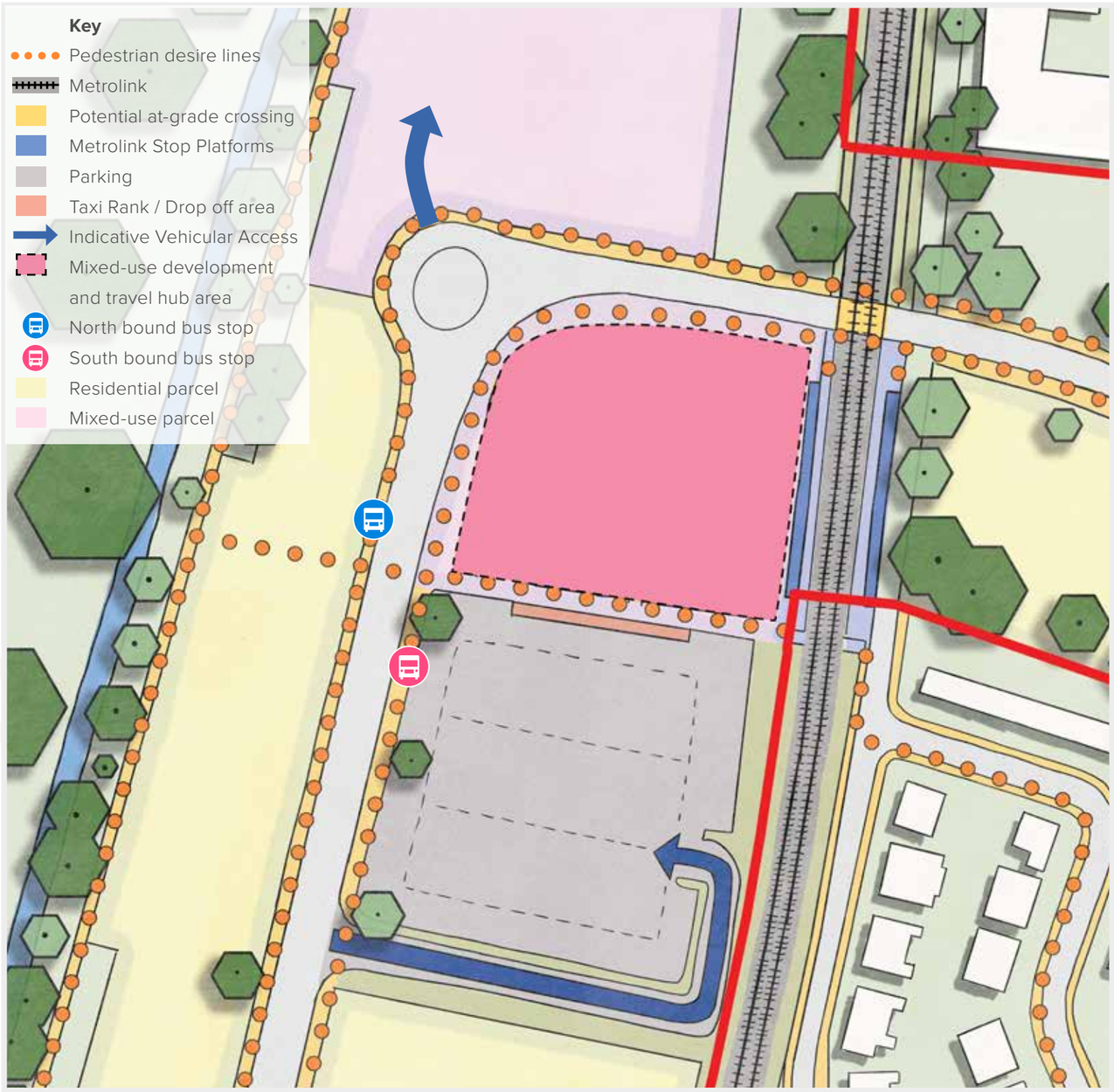
Located in the eastern part of the site at Warth Fold, the new Metrolink stop will be a strategic destination for the whole development and wider local community. A place which clusters modes of transport and other services and facilities in one “hub” location for ease of use by residents, workers, and visitors. The location, size, and mix of facilities within the hub will be designed to generate activity in the public realm throughout the day.

This will support one of the key objectives of the scheme to promote a culture of active travel and healthy living.

Design work in respect of the Metrolink Stop and associated travel hub is ongoing and being led by TfGM. It is envisaged that measures could include:

- Arrival from the Metrolink stop into a public square overlooked by mixed-uses (ex. shops, cafe, etc.);
- Seating areas;
- Play area;
- Cycle storage area to comprise a combination of Sheffield stands, cycle hub, e-bike/cargo bike storage etc.;
- Bus stop;
- Car park (Park & Ride);
- EV car charging;
- Motorcycle parking area;
- Secure parcel lockers for online shopping delivery/ collection; and
- Taxi pick-up/ drop-off area.

The delivery of the proposed new stop is subject to a business case and suitable funding strategy being developed. The proposed at-grade crossing of Metrolink is also subject to TfGM approval.



Metrolink Stop Concept Plan

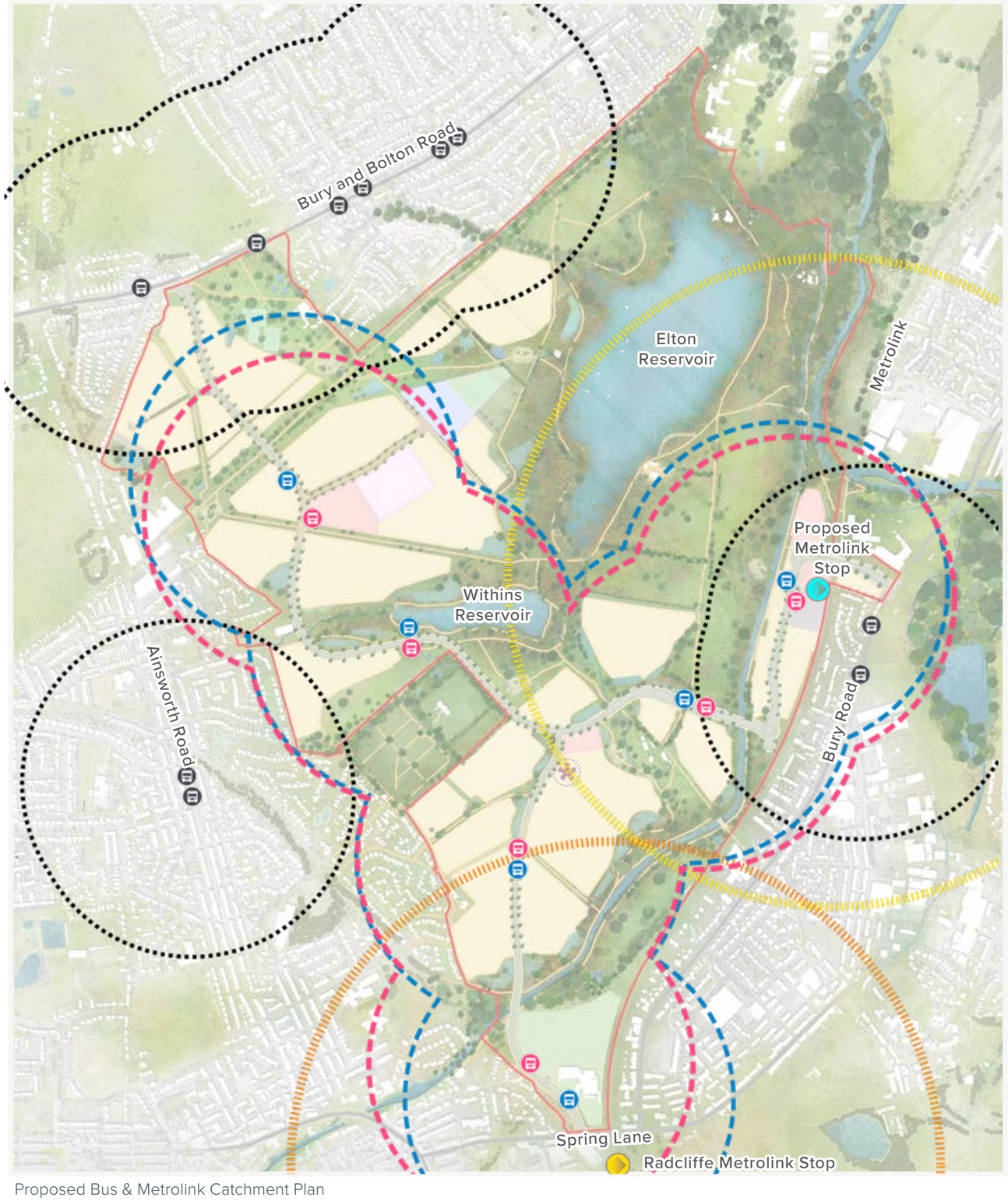
Access, Highways & Movement

Bus Services & Infrastructure Provision

Accessibility by bus will be key to the sustainable development of the site. The Greater Manchester Bus Strategy has an aim for 90% of Greater Manchester's population to be within 400m of a 30-minute bus or Metrolink service.

Consideration will need to be given to the location of bus stops along the link road having regard to bus stop catchment areas and the catchment areas for the new Metrolink stop.

Active travel routes to and from bus stops, the nature and location of crossing points on the link road and whether on-road bus stops or bus lay-bys are preferred will be determined at planning application stage.



Proposed Bus & Metrolink Catchment Plan

Key

- North Bound Bus Stops
- North Bound 400m Catchment Zone
- South Bounds Bus Stops
- South Bound 400m Catchment Zone
- Existing Bus Stops
- Existing Bus Stops 400m Catchment Zone
- Radcliffe Metrolink Stop
- Existing Metrolink (Radcliffe Stop) 800m Catchment Zone
- Proposed Metrolink Stop
- Proposed Metrolink Stop 800m Catchment Zone
- Development Parcels

Access, Highways & Movement

Active Travel & Movement

The promotion of sustainable modes of transport and permeable connections will be critical for the delivery of the Elton Reservoir site. Development should be designed to ensure ease of walking, wheeling, cycling and equestrian movement through the site.

Active travel infrastructure in accordance with LTN1/20 and other relevant design guidance will be required to be delivered both within and outside the site to support sustainable travel connections.

All development within the allocation should seek to conserve existing public rights of way (with diversions as appropriate), and improve walking, wheeling, cycling and equestrian connectivity for both active travel and recreation, through:

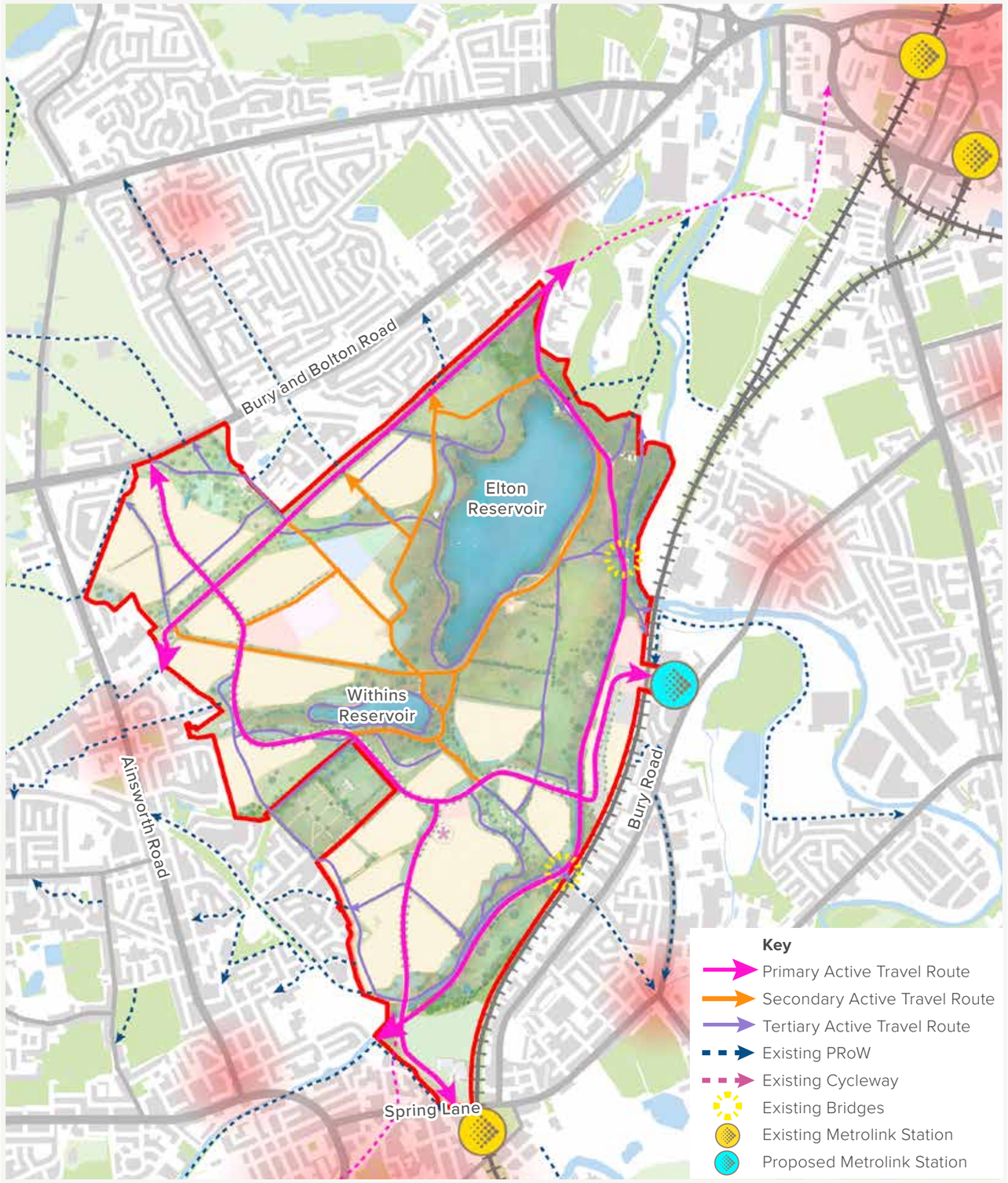
- Utilising the Manchester, Bury and Bolton Canal and Bolton-Bury Cycleway to provide strategic longer distance routes
- New north-south connections to the proposed Metrolink stop via the link road shared pathway and existing PROW network;
- Improved circular recreation routes focused around the reservoirs;
- Improved cycle connections to surrounding communities;
- Exploring opportunities to enhance the Irwell Sculpture Trail with new interventions located within the Heritage Park and along the canal corridor; and
- Retention of existing bridleways, with diversions where necessary.

The indicative masterplan presented in Chapter 6 and the adjacent active travel plan identify a network of dedicated active travel routes designed to permeate the development, including direct links between the local centres, schools, Metrolink stop and travel hub. These routes offer the quickest and most direct way to access key destinations, day-to-day needs as well as direct connections to surrounding areas by non-car modes.

The proposals identify a hierarchy of routes including:

- Primary active travel route, linking key destinations along strategic movement corridors and green corridors with walking, wheeling, cycling and equestrian provision;
- Secondary active travel routes, linking key destinations along open space and through neighbourhood parcels; and
- Tertiary active travel routes – leisure routes with pedestrian priority.

Delivery of active travel infrastructure in the immediate vicinity of the site and outside of the allocation will also be required to support sustainable travel connections.



Active Travel Plan

Ecology

Development plan policies of most relevance are: PfE Policies JPA7: Elton Reservoir; JP-G7: Trees and Woodland; and JP-G8: A Net Enhancement of Biodiversity and Geodiversity

The Elton Reservoir site contains a number of features of ecological interest, including Sites of Biological Importance (SBIs) at Elton Reservoir; Manchester, Bolton and Bury Canal (East); Elton Goyt; Withins Reservoir; Black Lane Marl Pits; and Radcliffe Wetlands. Potential impacts of the Elton Reservoir allocation on the ecological value of these sites were thoroughly considered as part of the overall planning balance by the Inspectors who conducted the Examination in Public of PfE. They concluded that the proposals meet the relevant tests of national policy and PfE was subsequently adopted.

Since the adoption of PfE the extent of the Elton Goyt SBI has been extended. The extended boundary includes land within the allocation. The masterplanning process has considered the implications of the extended SBI for the delivery of the allocation.

Extensive ecological evidence has informed the masterplanning of the Elton Reservoir site and will continue to be considered throughout the planning process, including through any subsequent planning applications. The masterplan has sought to minimise impacts on SBIs within the site and whilst the protection of ecological assets is clearly an important objective for planning, so too is meeting future development needs. Planning can often face difficult choices around achieving an appropriate planning balance and the reconciliation of often competing interests.

In this regard, the masterplan shows parcels of development and part of the link road on land that was subject to the recent extension of the Elton Goyt SBI. This will have an unavoidable adverse impact on the SBI. Future planning applications on this part of the site will therefore need to demonstrate that an appropriate strategy is in place to mitigate or compensate for the adverse impact on the SBI in accordance with PfE Policy JP-G8.

Consideration of ecological mitigation and of the approach to Biodiversity Net Gain at the site have informed the draft ERDF. The delivery of each phase of the site will be informed by more detailed ecological mitigation strategies and Biodiversity Net Gain strategies prepared in accordance with PfE Policies JPA7, JP-G7 (Trees and Woodland) and Policy JP-G8 (A Net Enhancement of Biodiversity and Geodiversity). The strategies will focus on protecting key habitats and species of most importance at the site, following best practice through implementation of the mitigation hierarchy.

A green and blue infrastructure network will be created by retaining and enhancing many existing features such as the network of SBIs, and ponds, watercourses, mature trees, hedgerows and woodland outside of these designated areas. This approach will safeguard the most valuable ecological areas whilst creating a connected network for wildlife movement both within the site and into the wider landscape.

Targeted improvements will include enhancing inflows and outflows to Elton and Withins Reservoirs, strengthening riparian habitats, and improving ponds and woodlands. Additional measures will include new attenuation ponds, extensive trees, woodland and scrub planting, and the retention and management of grassland outside the developable area.

The development will deliver at least the statutory 10% Biodiversity Net Gain (BNG). However, some retained habitats which fall within SBIs may have limited potential for measurable BNG uplift, and some multifunctional green spaces are not suitable for BNG delivery due to the potential conflict of human interference with habitats (dog walking, play, sports). On site BNG will be optimised but it is likely that off-site measures will be required. These will be delivered in the first instance through Bury Council's local offsetting capacity, supplemented by a strategic offsetting site if needed.

Further ecological surveys and strategies should be submitted with all planning applications within the site to ensure that these reflect the latest position. The following principles must be adhered to in all ecological strategies:

Sites of Biological Importance

- Direct impacts on the SBIs should be avoided or minimised where possible.

Biodiversity Net Gain

- Avoid where possible the medium and high distinctiveness habitat within the site;
- Built development should be focused within the lower distinctiveness habitats; and
- Opportunities to enhance retained habitats are to be explored.

Great Crested Newts

- Retain all confirmed GCN breeding ponds, and most optimal terrestrial habitats in close proximity to breeding ponds; and
- Create and enhance breeding and terrestrial habitat to improve habitat connectivity.

Birds

- Retain the most valuable habitats within the site for the breeding and wintering bird assemblages;
- Habitat creation and enhancement within open space;
- Mitigate for displacement of ground nesting species likely to be delivered through off-site compensation; and
- Management of access to balance recreational activity with environmental protection.

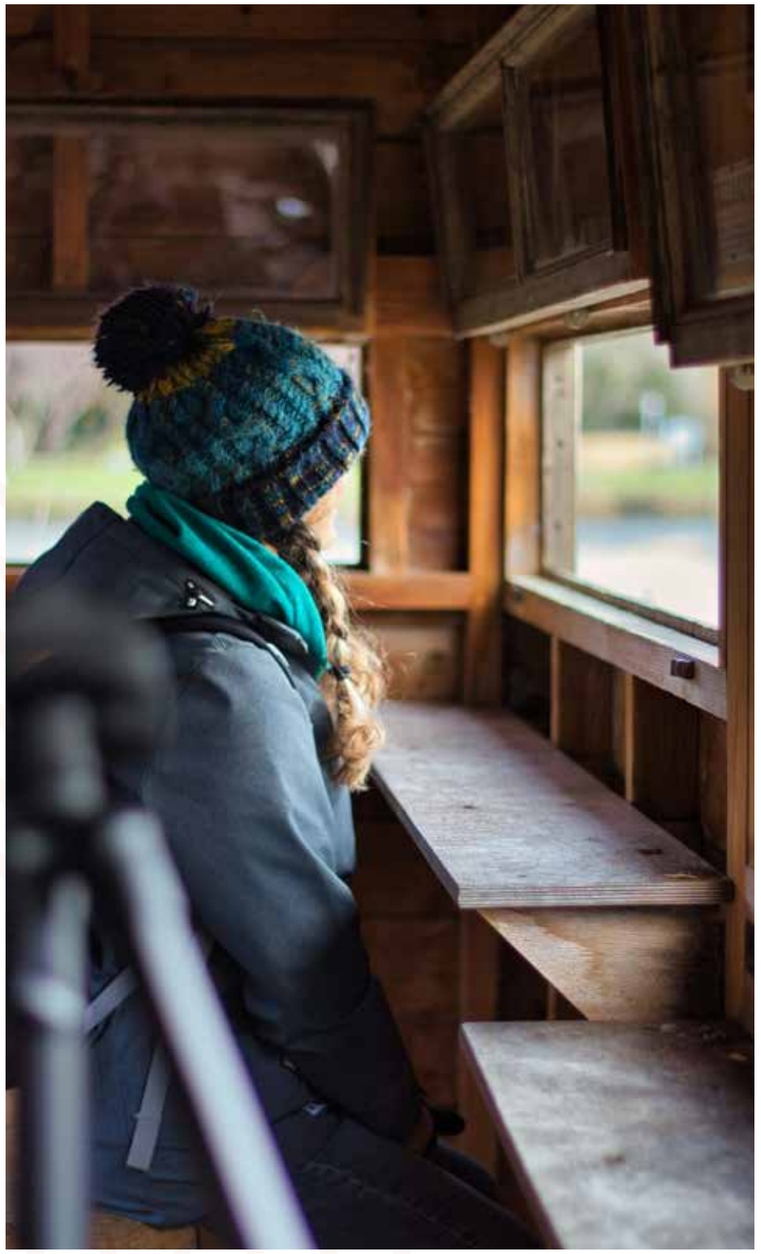
Ecology

Maintenance & Management

The long-term positive management of green spaces and in particular the retained and newly created habitats, including those within SBI designations should be secured through Landscape and Habitat Management Plan(s) (LHMP). These plans should also cover any off-site habitats delivered as part of the BNG and mitigation strategy.

Ongoing monitoring will be embedded within the LHMP to track habitat condition, species use and the effectiveness of management measures. Results will be regularly reviewed, allowing management practices to be adapted as necessary to ensure long-term ecological benefits are achieved.

Planning applications will be expected to include an Access Management Strategy to guide where public access is encouraged, controlled or restricted, depending on ecological sensitivity and functional objectives. This will be particularly important for preventing disturbance to breeding and wintering birds.



Bird Hide- ©SvenAllebas: Unsplash



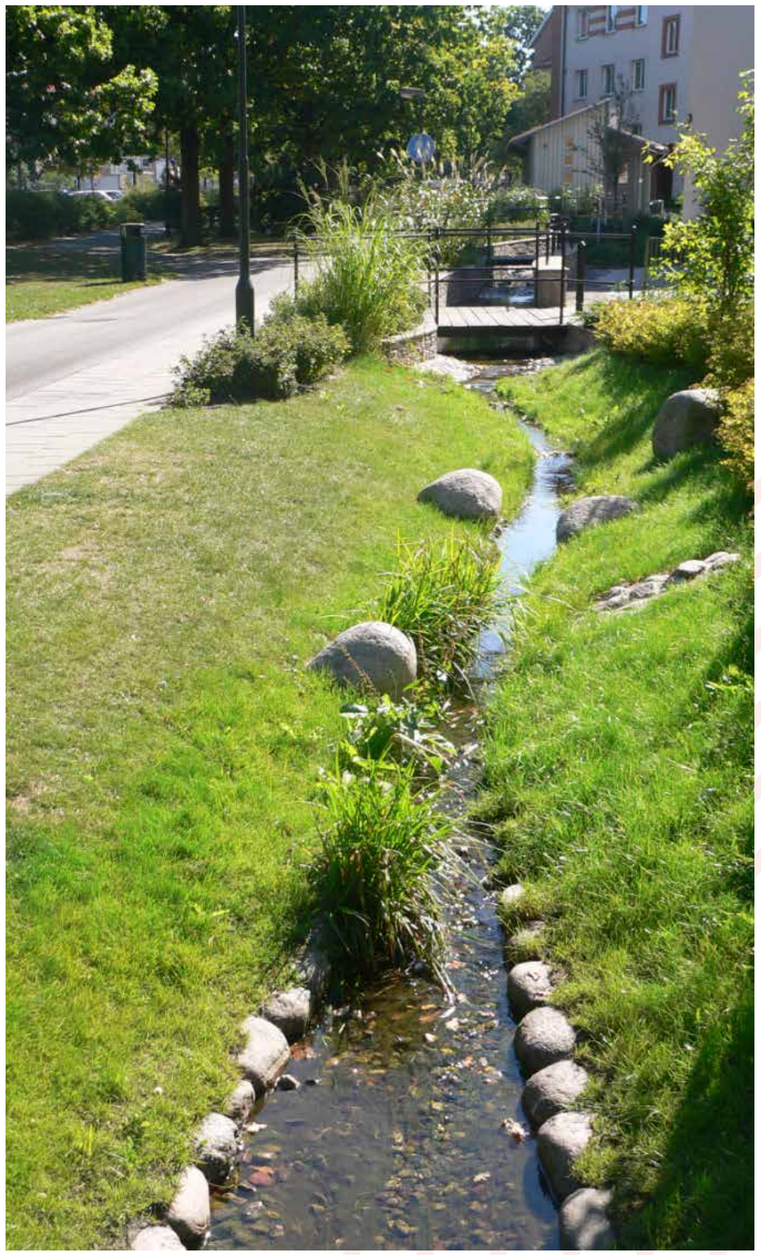


Sustainability, Energy & Carbon Reduction

Development plan policies of most relevance are: PfE Policies JP-S2: Carbon and Energy; and JP-S3: Heat and Energy Networks; and GMCA Net Zero Design and Submission Guidance (Parts 1, 2 and 3)

Greater Manchester's ambition is to become a carbon neutral city region by 2038. This ambition is supported by Bury Council through a declaration of a climate emergency.

The Elton Reservoir site offers the opportunity to support Bury and Greater Manchester's commitment to net zero through the delivery of a sustainable, low carbon neighbourhood. Delivery of the site should be in accordance with the sustainability principles set out in Chapter 9.







Flood Risk & Drainage

Development plan policies of most relevance are: PfE Policy JP-S4: Flood Risk and the Water Environment

The site provides many opportunities for sustainable water management and to incorporate multi-functional SuDS features, particularly around the two reservoirs and their associated watercourses.

The masterplan has been informed by a site-wide drainage strategy which has been developed with a holistic approach to ensure that each development parcel has suitable water storage to operate independently and as part of the whole development. To ensure the development is future-proofed, the drainage strategy has been designed with consideration for climate change with an additional 45% allowance to provide protection from flooding across the lifespan of the development.

The drainage strategy incorporates a range of SuDS features including swales and attenuation basins to manage the flow of water. The drainage should be designed sensitively around the SBIs and retained ponds in the area. These sites are particularly sensitive to development; therefore, water flow rates will be controlled to provide a solution to any water demands required at these sites and wildlife friendly SuDS design will be incorporated.

Water quality is a key consideration throughout the site. Water quality treatment should be incorporated at source to reduce the impact of any contaminants on site, in accordance with PfE policy JP-S4 and water quality standards.

The drainage strategy may consider using the Elton Reservoir for some of the additional storage, where necessary, in extreme weather events. However, the potential use of the reservoir for additional storage will need to be tested further as part of the planning application process.

Relevant planning applications should be accompanied by a Flood Risk and Drainage Assessment and Strategy which includes the following principles:

- Ensure that individual flood risk and drainage proposals are in line with the site-wide strategy;
- Locate and design development to minimise the impacts of current and future flood risk to increase resilience to flooding;
- Maintain greenfield run-off rates through the incorporation of attenuation features across the site;
- Drain impermeable areas via an adoptable surface water drainage network, attenuated into strategic basins, controlled and discharged at greenfield discharge rates to existing watercourses;
- Develop an effective foul drainage system, including pumping stations, which is to be accepted and adopted by United Utilities;
- Ensure that sustainable drainage systems are designed in accordance with GM SUDS Design Guidance to provide multifunctional benefits wherever possible, including for water quality, nature conservation and recreation; and
- Avoid adverse impacts on water quality and any possibility of discharging hazardous substances to ground.



Example of drainage feature

Flood Risk & Drainage

The adjacent plan illustrates the proposed indicative strategic drainage strategy for the development.



Example of drainage feature integrated within green corridor



Strategic Drainage Plan

Education

Development plan policies of most relevance are: PfE Policies JPA7: Elton Reservoir and JP-P5: Education, Skills and Knowledge

The development will contribute to new and expanded education provision to meet the needs of the development. PfE Policy JPA7 requires the provision of two new two-form entry primary schools and additional secondary school provision.

In recent years, there has been a sustained decline in the birth rate in Bury and the number of primary school children living in Bury is projected to fall in the medium term. Consequently, in terms of primary school provision, it is now clear that some surplus capacity has emerged within the locality particularly to the south of the site. With this surplus capacity forecast to grow, it is unlikely that two new two-form entry primary schools will be required on site.

Given the scale of the site and that there is insufficient capacity in surrounding schools around the northern part of the site to accommodate the full expected pupil yield from the development, the indicative masterplan provides for one new two-form entry primary school with potential for it to grow to a three-form entry primary school should that be required.

The proposed location of the new school is shown to the north of the site near to the Mill Quarter Local Centre. It is anticipated that this new school will serve the pupils located in the north of the development where the majority of family housing is to be located. However, the location of the new school is not fixed at this stage and would be subject to detailed design.

Initially it is likely that the primary school is developed as a two-form entry school, increasing over time to a three-form entry school if required. The precise timing of delivery of the primary school will be determined by the Council's Education Needs and Demand Assessment, which will also be used to update the Infrastructure Delivery and Phasing Strategy for the site. Planning applications for the site will need to reflect this evidence to ensure that the additional education needs generated from the development are provided for at the appropriate time.

There is currently surplus capacity within existing primary schools which could assist in absorbing the demand generated by pupils located in the southern parts of the development. As the development comes forward, these existing schools could be expanded if needed at an appropriate time.

The Council will continue to carefully monitor and model the forecast demographic changes so that new education provision provided on-site within the masterplan will be delivered at the appropriate trigger points aligned to the phasing of the scheme and taking into consideration wider demographic trends.

The allocation includes land for a new secondary school on the Coney Green site. This is already under construction and due to be completed in 2026. Whilst this will increase secondary school provision in the area, there is likely to be a need for additional secondary school places as the development progresses. Financial contributions towards the cost of additional provision will be secured as part of relevant planning applications for each phase of development.

Education

Primary School Provision

The indicative masterplan provides for one new two-form entry primary school with potential for it to grow to a three-form entry primary school, should that be required, within the Mill Quarter to the north of the site.

Whilst the location of the proposed school will be kept under review, the proposed location seeks to reduce reliance on car travel for short trips and supports walking, wheeling and cycling to school. It also considers the surrounding road network to avoid traffic congestion and parked cars dominating the street scene.

The proposed new school is also located near to the Mill Quarter Local Centre acting as a catalyst for activity, promoting community interaction and boosting the local economy.





Primary School Concept Plan

Local Centres & Healthcare Provision

Development plan policies of most relevance are: PfE Policies JPA7: Elton Reservoir

The masterplan proposes three distinct local centres which will provide a diverse range of appropriate retail, healthcare and community facilities, varying in character depending on their surrounding context and offering a variety of employment opportunities.

These are:

1. Redvales Works Local Centre
2. Withins Valley Local Centre
3. Mill Quarter Local Centre

Healthcare Provision

The necessary mix and specific location for the provision of healthcare facilities will be determined in consultation with the Greater Manchester Integrated Care Board's (ICB) Primary Care and Estates teams for the Bury Locality, in line with the principles set out in this chapter.

On-site healthcare provision should be within a single building with a planned mix of compatible uses in proximity. The design of any on-site healthcare facility will need to meet the most up to date model of health care provision standards and be sized to incorporate the building as well as operational requirements related to parking, servicing and access for emergency vehicles.

Opportunities to consolidate existing health provision within the area will also be explored. Where there is potential for co-location of the primary care services required by the development with other complementary services, consideration will be given to ensure that the specific clinical design requirements of primary care can be satisfied.



Local Centres Location Plan

Local Centres

Redvales Works Local Centre

Redvales Works Local Centre will be one of the primary mixed-use centres, and it is proposed to be the civic and cultural quarter of the future development. Benefitting from the Metrolink stop and travel hub, it will be a primary meeting point for the community and a hub of activity at the eastern gateway.

This centre will be the promoter of the modal shift towards active travel and car use reduction, therefore urban grain and parking requirements of this local centre will need to reflect the new needs of the evolving community, through the use of civic squares and car-free zones amongst buildings.













A variety of mixed uses will feature in this local centre, with potential for restaurants, cafes, shops and community facilities located on the ground floor of apartment blocks, spilling onto pedestrianised streets and catering for the footfall created by the travel hub.

Local Centres

Withins Valley Local Centre

Withins Valley Local Centre is proposed to be a place where nature and community meet. Smaller in size, it will cater for the day-to-day needs of residents and create a focal point in the southern part of the development. It will also include provision to meet identified needs for older persons' housing.













It is located at the meeting point of a number of active travel routes and green corridors, which will draw people in creating opportunities for natural play, community growing areas, and leisure activities.

It is also a place where the community can come to rest, connect with others, and gather in contact with nature.

Local Centres

The Mill Quarter Local Centre

The Mill Quarter Local Centre is also a primary mixed-use centre, which will provide a range of facilities including a retirement village, community and healthcare facilities, retail and co-working spaces in the western part of the development.











This local centre will be a primary meeting point for the community, accommodating working, learning and leisure opportunities. The primary school is proposed to be located in proximity to the Mill Quarter Local Centre, acting as a catalyst for activity, promoting community interaction and boosting the local economy.

The co-location of uses, including shops and services, residential, retirement village and school, will create activity and vibrancy. The built form will support these uses through the incorporation of courtyards and intimate streets, using a combination of hard and soft landscape where people can rest, meet and socialise.

Open Space, Sport & Recreation

Development plan policies of most relevance are: PfE Policies JPA7: Elton Reservoir and Bury UDP Policy RT2/2: Recreation Provision in New Housing Development

In line with existing local policy requirements and standards, the sport and recreation demands arising from the development are likely to be:

- 6.24ha of parkland;
- 32ha of natural and semi-natural greenspace;
- 4.99ha of amenity greenspace;
- 1.95ha of allotment provision;
- 1.95ha of children and young people's play spaces;
- Youth (11v11 and 9v9) and mini (5v5 and 7v7) grass pitches;
- 3G pitches; and
- Replacement of existing recreation space at Warth Fold.

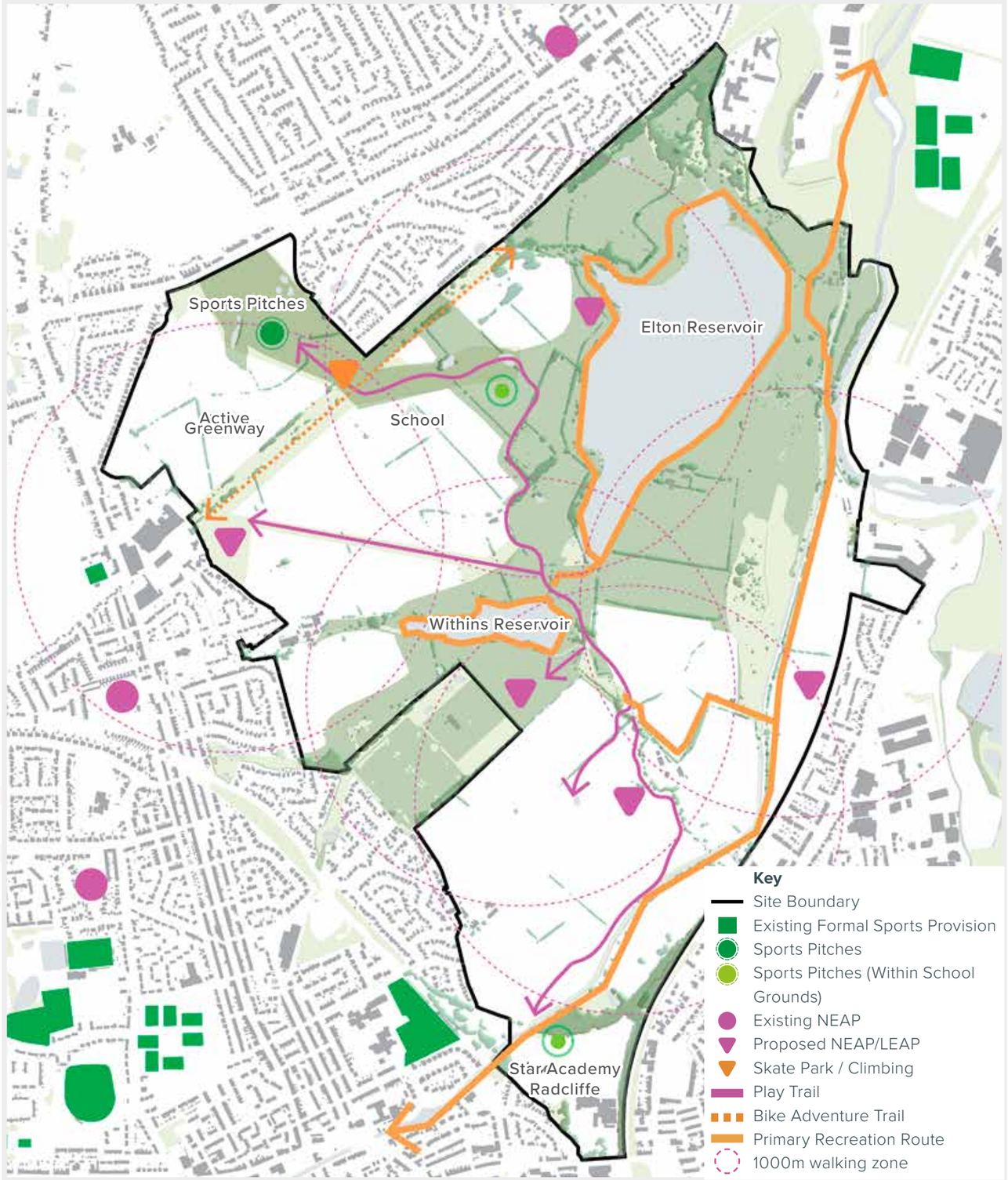
The masterplan includes proposals for a significant green corridor, which provides a strategic amount of new, high quality and publicly accessible open space. This approach seeks to meet the sport and recreational needs arising from the development, whilst conserving and enhancing the retained Green Belt and existing reservoirs, waterways and active travel corridors. It will maximise access and recreational benefits for existing and future communities. Opportunities for the dual use of facilities through new school provision should be explored along with the potential for 3G provision to help to accommodate mini formats of pitch sports.

Neighbourhood Equipped Play Areas (NEAPs) should be located within key open spaces and adjacent to existing recreation assets (Elton Reservoir).

The masterplan proposes a holistic approach to sports and play across the site harnessing the potential of existing natural assets and community facilities while respecting sensitive habitats and ensuring managed access. Creating a more accessible network of amenity open space and enhanced PRoW will provide greater connectivity across the Elton Reservoir site and deliver multi-functional space that can support recreation, play, sport and other community activities.

The water bodies and watercourses provide a great opportunity for recreation and a focus for residents to enjoy the green spaces. Opportunities to enhance the range of publicly accessible activities at Elton Reservoir will be explored with the Canal and Rivers Trust and Elton Sailing Club.

A focus on nature-based education and play will reflect the sensitive nature of the Green Belt and surrounding protected habitats. Contact with nature provides a wide range of benefits, including physical, mental and social well-being benefits, as well as learning opportunities and the chance to develop an understanding of nature.



Open Space, Sports and Recreation Plan

Open Space, Sport & Recreation

The masterplan proposes key areas of open space at:

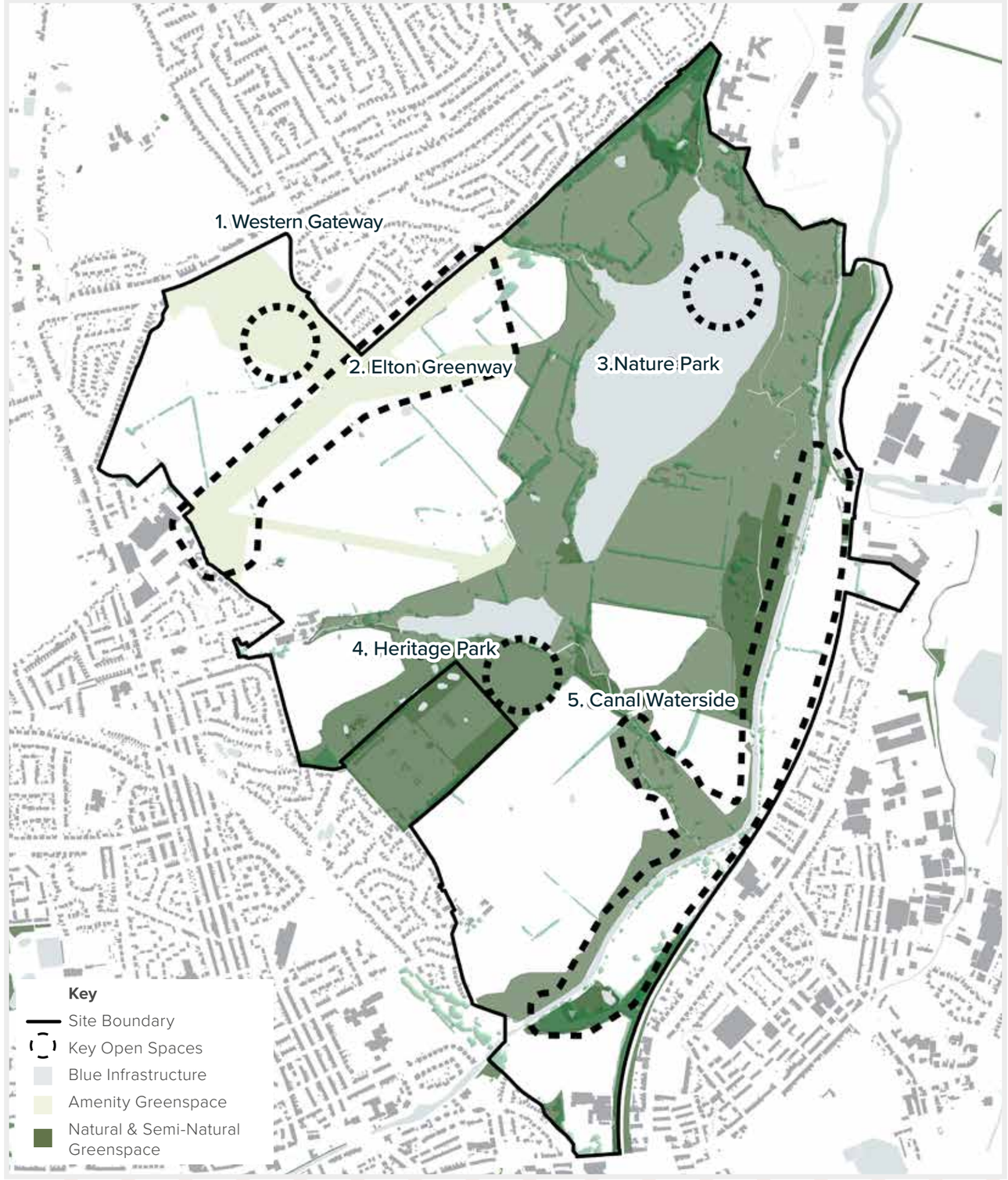
1. Western Gateway
A green and welcoming arrival space with formal sports provision and community uses.

2. Elton Greenway
A new ecological and recreational greenway providing enhanced east-west connectivity, improved wildlife corridor and community play, leisure and growing space.

3. Nature Park
Focused around the existing reservoirs, the Nature Park will provide an enhanced network of walking and cycling routes, access to the water for recreation and improved facilities.

4. Heritage Park
A new community greenspace with play, informal sports and historic interpretation to celebrate the site's historic features.

5. Canal Waterside
The Manchester, Bolton & Bury Canal will provide an attractive waterside living environment and become a focus for recreation, active travel and biodiversity.



Key Open Spaces Plan

Green Belt, Landscape & Heritage

Green Belt

Development plan policies of most relevance are: PfE Policies JPA7: Elton Reservoir; JP-G2: Green Infrastructure Network; and JP-G7: Trees and Woodland

The identification and deliverability of compensatory improvements to the environmental quality and accessibility of the remaining Green Belt in the vicinity of the site should be submitted as part of a planning application. It is anticipated that this could be achieved within the area of retained Green Belt within the site. Open space proposals for the site are described in the previous section of this chapter, *Open Space, Sport & Recreation*.

Trees & Woodland

An assessment of trees is expected to accompany all planning applications. Where mature trees are removed, these should be replaced with trees of suitable number, size and maturity, taking into consideration the width of the tree and contributions to the treescape, biodiversity and other ecosystem services to provide adequate compensation.

Engagement with City of Trees as part of the planning process is recommended.

Heritage

Development plan policies of most relevance are: PfE Policies JPA7: Elton Reservoir and JP-P2: Heritage

Development should take appropriate account of relevant heritage assets, and their settings, including the Old Hall Farmhouse Grade II Listed Building.

The indicative masterplan shows development set back from Old Hall Farmhouse and associated gate piers ensuring separation between the listed assets and new development to preserve an appreciation of their rural setting and views to and from the principal northern elevation.

The indicative location of the link road avoids the potential ‘hengiform’ allowing remains to be retained in situ. The creation of a new publicly accessible heritage park will improve public understanding and appreciation of the heritage of the area, including through public art and interpretation. The route of the Roman road will also be retained and referenced through public art and footpath alignment.

Subject to further assessment, development is to be set back from Higher Spen Moor Farm House allowing for the potential retention of the farmstead in situ.

Other Technical Matters

Digital Connectivity

Development plan policies of most relevance are: PfE Policy JP-C2

It is expected that internet connections will be operational and immediately accessible to network providers when occupiers move into new properties. A digital connectivity statement is expected to accompany all planning applications.

Minerals

Development plan policies of most relevance are: PfE Policy JPA7: Elton Reservoir and GM Minerals Local Plan Policy 8: Prior Extraction of Mineral Resources

Planning applications will be expected to be accompanied by evidence of how the requirements of Policy 8 of the Minerals Local Plan have been addressed.

Landfill & Contamination

Details of remediation and coal mining risk assessments are expected to accompany all planning applications, where required.

Chapter Eight

Elton Phasing Strategy

Phasing & Delivery

The Elton Reservoir site provides a major residential-led development opportunity with potential to deliver around 3,500 new homes, supported by a range of essential physical and social infrastructure, including a new Metrolink stop, a new link road and new primary school. This Development Framework provides a high-level strategy for the site and establishes the key principles for the future delivery of the Elton Reservoir site, whilst retaining flexibility to allow for opportunities across the site.

Given the size of the development, it will take several years for the development to be fully delivered and therefore it is important to prepare a phasing and delivery strategy to bring the site forward. This phasing and delivery strategy helps to shape the parameters within which future planning applications will be brought forward, and provides a holistic and coordinated approach to the delivery of on and off-site physical and social infrastructure. Development is expected to come forward in a series of phases alongside necessary infrastructure provision and a flexible approach is proposed in order to be responsive to opportunities.

To support the delivery of infrastructure across the site, an Infrastructure Phasing and Delivery Strategy ("IPDS") will be prepared in accordance with the PfE Policy JPA7 and JP-D1 and SPD18. This IPDS should be read alongside this SPD, noting that the IPDS is intended to be a "live document" that is continuously reviewed and updated as plans, evidence, infrastructure costs and the potential of funding become available.

Planning applications within the site will be required to demonstrate how proposed development would assist in the delivery of key infrastructure, without compromising or prejudicing the comprehensive development of the site. Proposals will need to demonstrate how the development of individual plots is consistent with the ERDF, the IPDS and any other material considerations. Planning applications should not sterilise, frustrate or otherwise constrain the delivery of other parts of the site or the strategic infrastructure requirements.

All development plots will need to be sufficiently coordinated with appropriate infrastructure delivered at the correct time to support a sustainable and comprehensive development. Planning applications which fail to deliver or contribute towards the wider strategic infrastructure requirements will be resisted.

The link road through the site will accelerate development and delivery, and will provide a new strategic highway and public transport asset that will help movement in Radcliffe and Bury West. Planning applications will be expected to demonstrate how delivery of housing and other development, including social infrastructure within the site will be coordinated with the delivery of transport and other physical infrastructure that is needed to support it.

Given the link road's strategic importance, the Council will work with key stakeholders and developers to help advance the necessary highway works and other key infrastructure as early as possible in the delivery programme. Early delivery of this road will facilitate development across the zones outlined below so that they come forward at pace.

Ecological mitigation and the timely delivery of key green and blue infrastructure are fundamental to the successful phasing of the Elton Reservoir development. Habitat and species protection, ecological connectivity and sensitive access management must be implemented ahead of, or in parallel with, development to ensure that early construction phases do not adversely affect retained ecological features.

Early establishment of strategic green corridors - including SBIs, pond networks, riparian habitats and woodland edges - will safeguard ecological function while providing the foundation for Biodiversity Net Gain delivery and high-quality placemaking.

The recreation and sports provision should be delivered alongside development to ensure that both demand is met and communities have the opportunity to connect with this infrastructure as the site becomes occupied.

Key Infrastructure Requirements

Development proposals must:

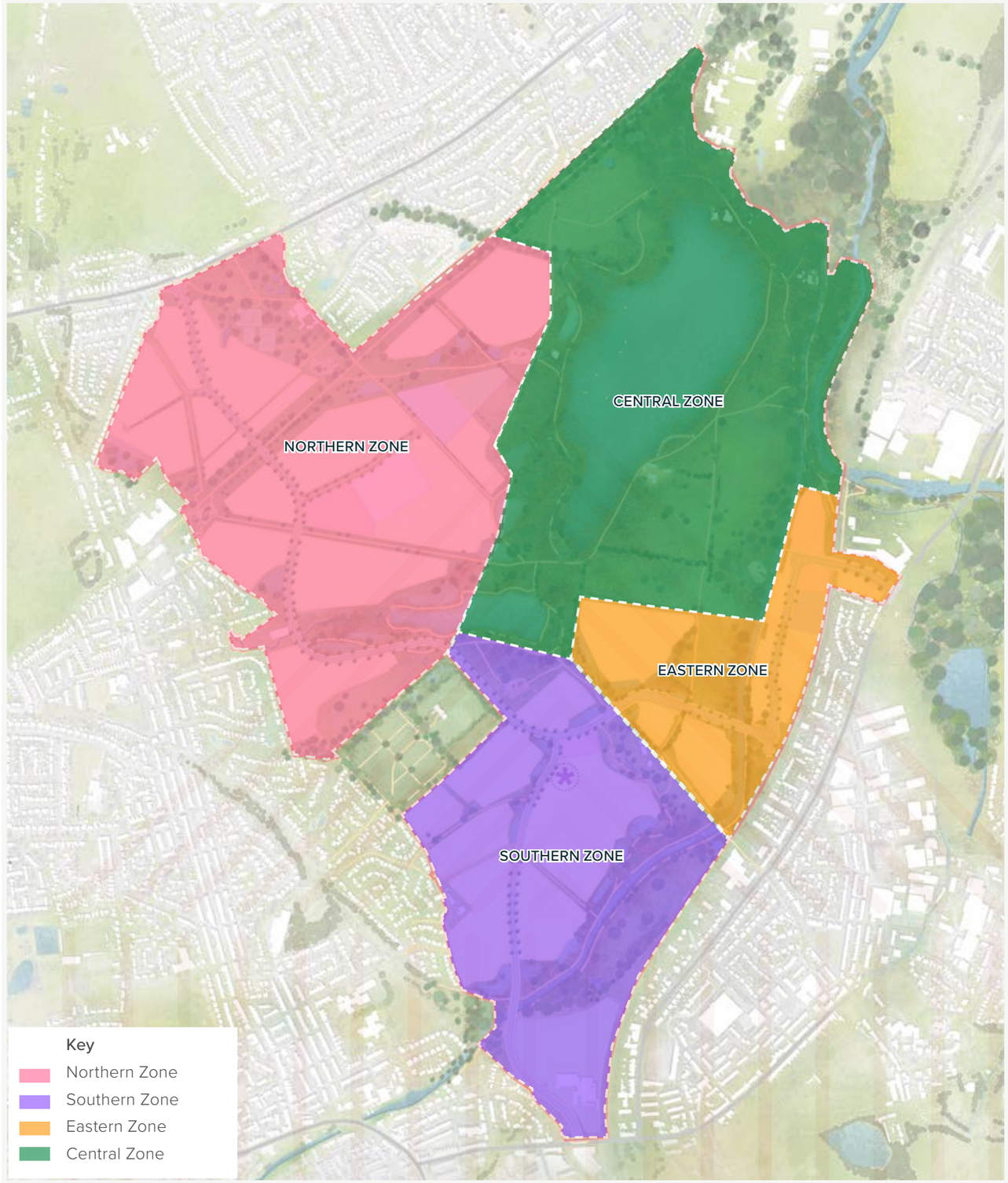
- Ensure that they are acceptable in planning terms, such that they mitigate their on and off-site impact in accordance with this Development Framework;
- Make an appropriate contribution to ensure the delivery of the strategic infrastructure identified by the Development Framework; and
- Ensure that they will not prejudice the delivery of strategic infrastructure and development on third party land.

Infrastructure requirements to support development at the Elton Reservoir site have been categorised as being either strategic infrastructure (primary infrastructure needed to support the full delivery of the site) or local infrastructure (on-plot infrastructure delivered directly as a matter of course by each developer to meet the requirements of individual development parcels).

Triggers for the strategic infrastructure will be identified through relevant and updated technical evidence. These triggers will also be included and refined in the IPDS and during pre-application discussions between applicants and the Council, ensuring proper determination of the appropriate triggers for the delivery of infrastructure.

The Elton Reservoir site is split into four broad 'zones', each of which will include multiple phases of development. These zones are shown on the adjacent Development Zones plan and comprise:

- **Northern Zone** - with potential to deliver up to 1,620 homes;
- **Eastern Zone** - with potential for up to 770 homes;
- **Southern Zone** - with potential for up to 1,100 homes; and
- **Central Zone** - comprising the Nature Park, recreational routes, ecological mitigation, Biodiversity Net Gain provision and Green Belt compensation.



Development Zones Plan

Key infrastructure Requirements

Strategic Infrastructure Requirements (site wide)

All development will be required to contribute to the strategic infrastructure requirements identified in the table below.

Infrastructure Element	Infrastructure Requirement	Comments
Highways and Public Transport	A north-south strategic link road connecting Bury and Bolton Road (A58) to Bury Road, Radcliffe, with a strategic connection from the link road to Spring Lane, Radcliffe	The link road will need to be operational at an appropriate time in the development programme to facilitate public transport and active travel through the site. The point at which this becomes necessary will be determined through a detailed Transport Assessment (TA) for the whole site and factored into planning applications as they come forward. With development anticipated to be undertaken simultaneously across all three development zones, the TA will provide the evidence to determine the capacity of the network and shape junction designs in the relevant locations. The TA will identify when the transport mitigation (including secondary access / egress) will be required.
	New Metrolink Stop and Public Transport Hub.	The new Metrolink Stop and Public Transport Hub is identified in the 2050 Greater Manchester Local Transport Plan Delivery Plan. The Bury West Transport Framework reinforces this public transport intervention at this site. Subject to final funding and business case approvals, the scheme will be delivered or be in delivery before 2032
	Active travel network including cycleways and pedestrian links.	These will be required throughout the site and within individual zones. The primary active travel routes will run alongside the Link Road, ensuring connectivity with all zones. Each development plot will need to demonstrate linkages to the site wide network (existing and new as appropriate).
	Bus Stop Provision	Triggers to be determined through a Transport Assessment for the site and in conjunction with TfGM.
	Off-site highway improvements	Triggers to be determined through a Transport Assessment for the site.
Social Infrastructure	Primary School Provision including new 2-form entry primary school with capacity to increase to 3-form	Triggers to be determined though Bury Council's Education Needs and Demand Assessment, in accordance with evidence of need for provision generated by the development.
	Secondary School Provision	Triggers to be determined in accordance with evidence of need for provision generated by the development.
	Local Centres, including retail/community/health facilities	Triggers to be determined through up-to-date needs assessments.
Environmental Infrastructure	Nature Park, Heritage Park, Green infrastructure including public open spaces, sports facilities and playgrounds.	Triggers to be determined by Bury Council's Open Space Assessment (2026) and Playing Pitch Strategy and a Heritage Strategy for the site.
	Surface water attenuation and SuDS, integrated with areas of green infrastructure.	Triggers to be determined through a drainage strategy for the site.
	Measures to protect hydrology and water quality throughout the development.	Triggers to be determined through a drainage strategy for the site.
	Nature areas, ecological mitigation and biodiversity net gain.	Triggers to be determined through an ecology strategy for the site.

Key infrastructure Requirements

Local Infrastructure Requirements (per plot)

In addition to the strategic infrastructure requirements above, each development proposal coming forward in the site will be required to provide specific necessary infrastructure to allow it to come forward.

Whilst there may be some bespoke requirements on some development plots, it is likely that the following will be required on each plot:

- Appropriate access/egress arrangements into the development plot from A58 Bolton and Bury Road, Radcliffe Road, Spring Lane or the proposed spine road;
- Active travel access from A58 Bolton and Bury Road, Radcliffe Road, Spring Lane or the proposed spine road;
- Internal highways;
- Internal walking and cycling routes;
- Utilities;
- Drainage (SuDS and attenuation ponds);
- Drainage (foul water);
- Water Supply;
- Power Supply;
- Telecoms Supply;
- Noise and Air Quality mitigation; and
- Green Infrastructure.

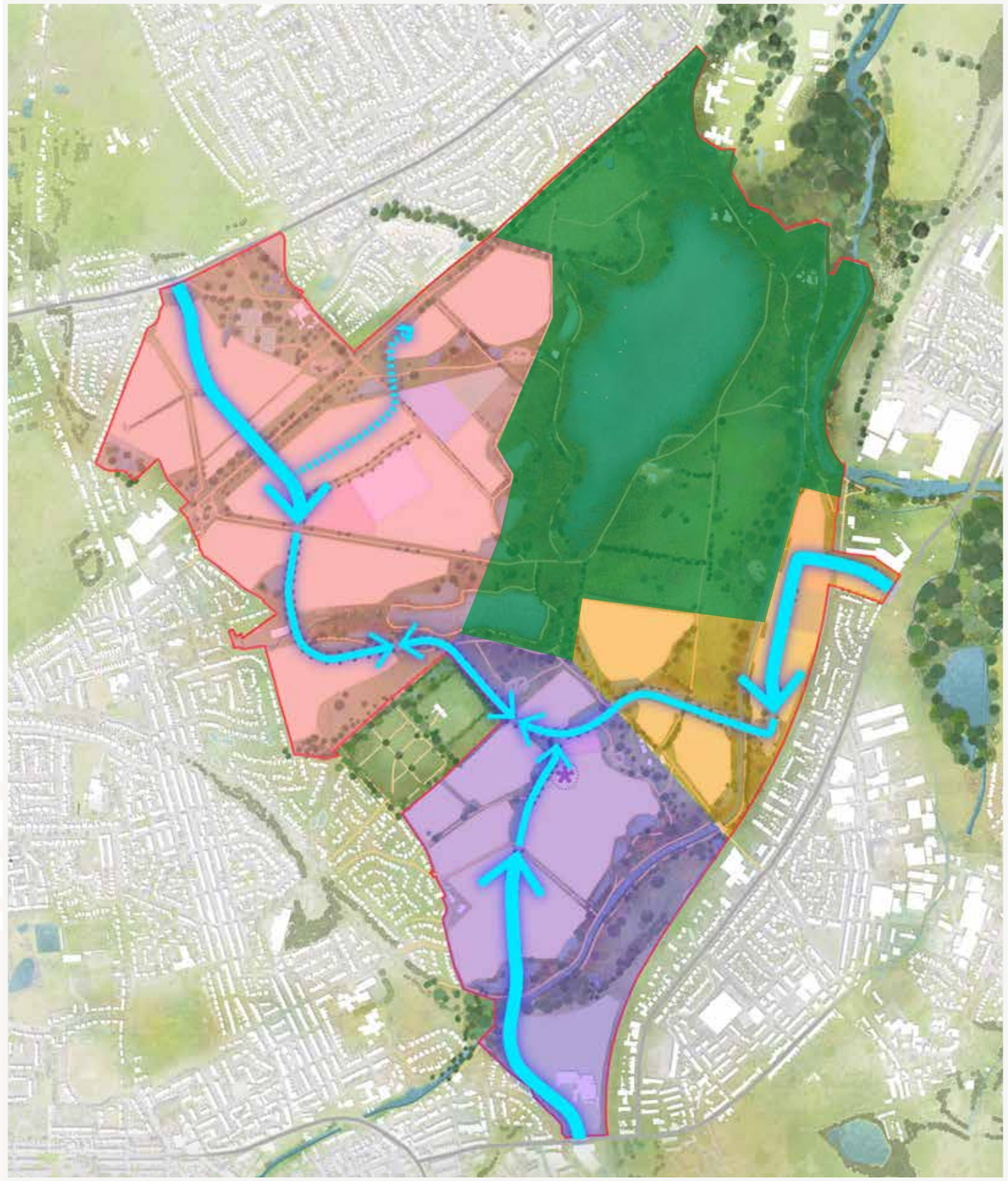
Phasing

The Elton Reservoir site includes four broad zones, shown on the adjacent plan.

Phasing of development, including the amount of development capable of being delivered within each zone, will be informed by more detailed evidence on site conditions and capacity, and timing will be determined by the delivery of the link road and the extent of available capacity within the surrounding highway network. This will need to be managed to ensure that highway and junction improvements are delivered outside of the site to accommodate additional movements.

Critical to this will be the need to exploit the sustainable location of this site and to deliver early investment in and around the site to improve public transport and active travel infrastructure. The delivery of the link road will be vital in ensuring that existing and new residents in this area and the surrounding local communities are able to gain easy access to this new infrastructure (e.g. providing access to both the new Metrolink stop and the existing stop at Radcliffe).

All phases of development will be delivered in line with the comprehensive vision for the wider development, supporting the site-wide requirements for infrastructure, particularly with regards to the link road, active travel, public transport, education provision and greenspace.



Spatial Areas and Phasing Plan

Phasing

Northern Zone

It is envisaged that residential development will commence in the Northern Zone of the allocation, with the key features in this area including:

- A mix of up to 1,620 homes;
- Affordable housing in line with PfE Policy JPA7;
- Primary access taken from the A58 Bolton and Bury Road;
- A significant new junction at the A58 access designed to provide for movement throughout the whole allocation, providing connectivity to later phases / southern and eastern zones within the development;
- Off-site highway and junction improvements including at the A58/ B6292 Bury Bolton Road junction;
- A new two-form entry primary school (with the ability to extend this to a three-form entry should there be a future need);
- A local centre, with community, healthcare and retail facilities;
- Specialist accommodation for later living;
- Green space provision, including new sports pitches, neighbourhood play spaces and new linear greenways linked to active travel routes throughout the zone, connecting into the other two zones and beyond; and
- Early strategy for mitigation to enhance connectivity between the network of retained ponds.

Development in this zone will start on the development plot which fronts the A58 Bury and Bolton Road. The link road in this plot will support development either side of it and enable future access into the site for the more residential development, and the primary school and local centre.

Highway infrastructure and other physical and social infrastructure will be carefully phased alongside the new homes. The timing of delivery of the new primary school will be determined by the Council's Education Needs and Demand Assessment and ensure that appropriate provision is in place and available before existing schools in this part of Bury West reach their pupil capacity.



Northern Zone

Phasing

Eastern Zone

The Eastern Zone will provide important infrastructure that is essential to facilitate an increased volume of development and to create sustainable transport options. The key features in this area include:

- A mix of up to 770 homes;
- Affordable housing in line with PfE Policy JPA7;
- Primary access to serve the zone will be taken from Radcliffe Road, with an at-grade crossing across the Metrolink line;
- A significant new junction at Bury Road will be designed to provide for movement throughout the whole allocation, providing connectivity to later phases / northern and southern zones within the development;
- Off-site highway and junction improvements, including at Radcliffe Road and the A56;
- A new Metrolink stop and associated Travel Hub and facilities;
- A local centre, providing for neighbourhood retail provision and other mixed uses;
- Enhancements to the canal corridor, including provision for active travel;
- Strategic element of the link road which provides a crossing over the canal to link into the Northern and Southern Zones; and
- Green space provision in the form of informal sport/recreation facilities, productive landscapes (e.g. allotments, community orchard) and neighbourhood play spaces.

It is envisaged that development of the transport infrastructure will commence at the same time or closely following the early phases of development in the Northern and Southern Zones. This will ensure that the transport provision (including highway, public transport and active travel) is programmed to be operational in time for when the link road is joined up from the Northern and Southern Zones. This linkage and ability to access the new transport infrastructure in this zone will help to facilitate the full quantum of development across the site, as well as the development opportunities in this zone.

The Council will work with stakeholders, including TfGM, to help shape and deliver the new Metrolink stop and travel hub as quickly as possible.



Eastern Zone

Phasing

Southern Zone

The Southern Zone will provide a significant amount of residential development, and the intention is to commence development in this zone as part of the early development phases. The key features in this area include:

- A mix of up to 1,100 homes;
- Affordable housing in line with PfE Policy JPA7;
- Primary access to the zone taken from Spring Lane, with some of this early infrastructure already being developed alongside the new secondary school in this location;
- Off-site highway and junction improvements, including at Spring Lane, Rectory Lane, Church St West and Deansgate;
- A new structure bridging over the canal is required as part of the first phase in this zone, which will provide highway access into the zone (eventually connecting through to the Northern and Eastern Zones);
- Highway which will provide for public transport movement and active travel, with strong linkages through to the existing Radcliffe Metrolink stop and Radcliffe town centre;
- A local centre, providing for neighbourhood retail and other mixed uses;
- Later living opportunities;
- Enhancements to the canal corridor, including for active travel provision and sensitive lighting where appropriate; and
- Green space provision, including a heritage park, play space, informal sports/recreation, neighbourhood play spaces and community orchard/allotment space.

It is envisaged that this zone could come forward at the same time as the Northern and Eastern zones. To enable this, the intention is to advance details on the design of the bridging structure that is needed to cross the canal to access the development parcels in this zone.

Early delivery of this zone will help to ensure residents have access to a range of services and facilities in Radcliffe Town Centre including Radcliffe Metrolink stop primary and secondary schools, retail and leisure facilities.

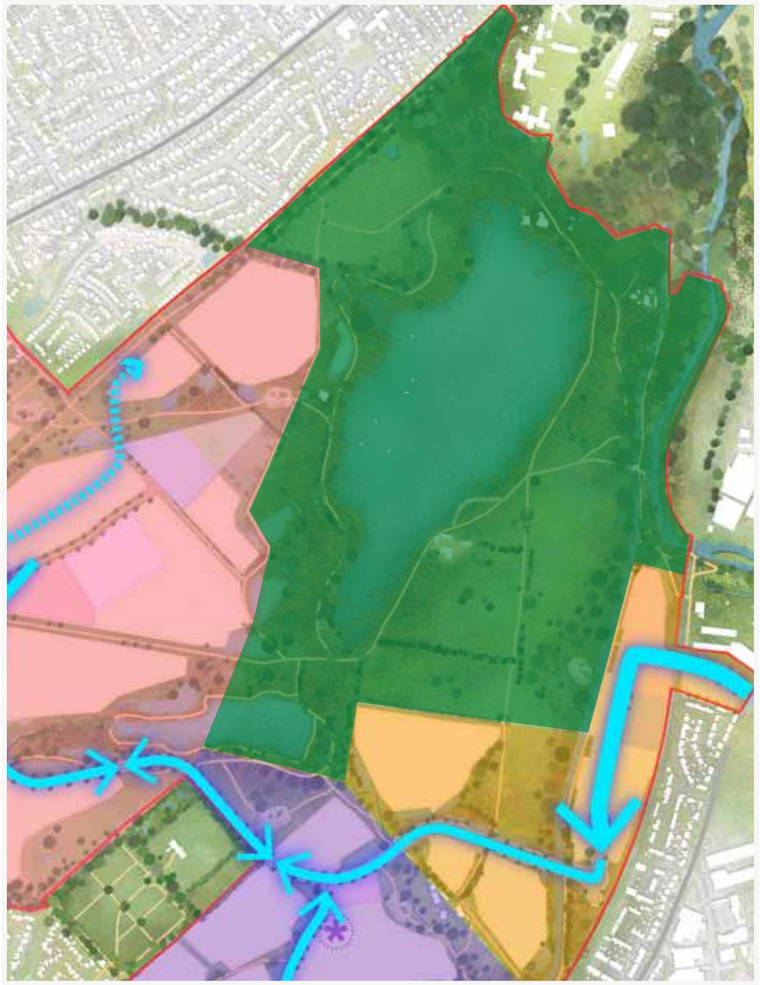


Southern Zone

Phasing

Central Zone

The Central Zone – comprising the Nature Park, recreational routes, ecological mitigation, Biodiversity Net Gain provision and Green Belt compensation – will be delivered in phases in association with each of the three key development zones. All planning applications for development within the site will be expected to demonstrate how the development would contribute proportionately to delivery of the Central Zone, either in kind or through financial contributions.



Central Zone

Summary

The approach to phasing set out in this ERDF is not intended at this stage to be chronological. Instead, the phasing and delivery approach outlined above seeks to accelerate development across all three development zones. Development within these zones will reflect a natural and logical way the site will come forward physically given the spatial principles established by the ERDF and infrastructure integrated within it, coupled with the aspiration to deliver the site successfully.

Due to the scale and nature of the proposed uses, and the timescales within which it is anticipated to be delivered, the ERDF needs to be robust as well as flexible. The ERDF provides suitable controls and principles to guide future proposals and to manage design qualities, whilst being able to adapt to changing market conditions, site constraints and opportunities to accelerate delivery.

The phased delivery of the Elton Reservoir site will be kept under review and will be determined by up-to-date evidence prepared to support future planning applications and the IDPS. Triggers for the strategic infrastructure will be identified through relevant and updated technical evidence.

The Council will work with all partners and stakeholders to bring forward the strategic link road and other strategic infrastructure and development in a coordinated manner that provides significant benefits to new and existing residents in this part of the Borough. This will include the Council (or other public sector bodies) potentially using its statutory land assembly powers (including Compulsory Purchase powers) to enable and facilitate the delivery of this major opportunity.

Funding & Equalisation

Funding

A range of funding and delivery mechanisms will be required, including:

- **Planning conditions and Section 106 Agreements to secure on-site infrastructure:** to secure the delivery of on-site infrastructure required to deliver development.
- **Developer contributions secured via Section 106 and Section 278 Agreements to support off-site infrastructure:** Developer contributions and/or delivery of infrastructure off-site will be secured to assist in mitigating the impact of the development (or relevant phase of the development). In line with the CIL Regulations, contributions will only be sought where they are necessary to make the development applied for acceptable in planning terms and will be fairly and reasonably related in scale to the development.
- **Public sector funding:** Where appropriate, sources of public sector funding will be investigated to assist or accelerate the delivery of strategic infrastructure such as the Metrolink stop.

Equalisation

Equalisation is a mechanism to ensure the fair and proportionate distribution of the necessary costs of the strategic infrastructure requirements, regardless of which specific parcel of land is developed. This approach seeks to avoid the costs falling disproportionately on early phases of development or being pushed back to later phases, which could be to the detriment of the comprehensive delivery of the site.

An equalisation approach will be followed in respect of the Elton Reservoir site. This means that all development proposals within the site must contribute towards the strategic infrastructure in a fair and proportionate manner.

Details regarding the mechanism for identifying fair and proportionate contributions will evolve through the IPDS and any associated documentation to support the delivery of the site.

In line with the Planning Practice Guidance, land values within the site should reflect the requirement to fund strategic and plot-specific infrastructure and mitigation.

The IPDS will continue to be updated to reflect the costs of wider infrastructure requirements at the site as they are understood and will expand upon the approach to equalisation through the contributions to be sought.

Pre-application discussions with the Council will refine local infrastructure requirements, which will be additional to those site-wide strategic infrastructure requirements that all development should contribute towards.

Chapter Nine

Sustainability

Sustainability Strategy

Delivering low carbon, sustainable homes

Greater Manchester's ambition is to become a carbon neutral city-region by 2038. This ambition is supported by Bury Council through a declaration of climate emergency. Achieving this goal will reduce the need for buildings and homes to be retrofitted in future to achieve carbon neutral goals set by Greater Manchester and the UK.

Strategic Objective 7 of PfE "playing our part in ensuring that Greater Manchester is a more resilient and carbon neutral city region" includes two specific themes of relevance to this chapter which are to:

- Promote carbon neutrality of new development by 2028, and
- Improve energy efficiency and the generation of renewable and low carbon energy.

The Elton Reservoir site provides an opportunity to support Bury and Greater Manchester's commitment to net zero through the implementation of the policies within PfE and the delivery of low carbon and highly sustainable homes.

This chapter focuses on the expectations and likely benefits from the Elton Reservoir site with respect to carbon, energy, resource efficiency and climate resilience which, collectively, would make a significant contribution to climate change mitigation and address the impacts of climate change. The specific policies within PfE that are relevant to this section and are considered in turn below are:

- Policy JP-S1: Sustainable Development;
- Policy JP-S2: Carbon and Energy;
- Policy JP-S3: Heat and Energy Networks;
- Policy JP-S4: Flood Risk and the Water Environment; and
- Policy JP-S6: Resource Efficiency.

Carbon and Energy

Policy JP-S2 includes an expectation that new development will be net zero in a phased approach, unless it can be demonstrated that this is not practicable or financially viable:

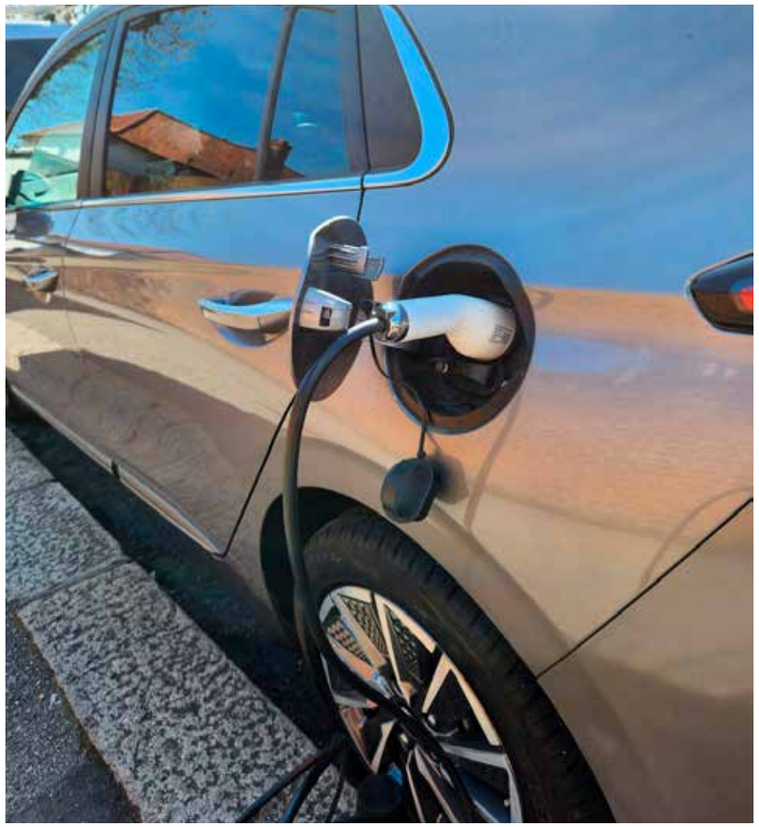
(a) From adoption (2024) – regulated operational carbon emissions: When the amount of carbon emissions associated with the building's operational energy on an annual basis is zero or negative. A net zero carbon building is highly energy efficient and powered from on-site and / or off-site renewable energy sources, with any remaining carbon balance offset.

(b) From 2028 – the above plus all emissions 'in construction': When the amount of carbon emissions associated with a building's materials and construction stages up to practical completion is zero or negative, through the use of offsets. For clarity, construction carbon is defined as life stages A1-A5.

Policy JP-S2 takes the definition of Net Zero Carbon from the UK Green Building Council (UKGBC) Net Zero Carbon Buildings Framework (UKGBC (2019)).

The UKGBC Framework is due to be superseded by the emerging UK Net Zero Carbon Building Standard (UK Net Zero Carbon Building Standard). Implications of this change will need to be considered once the UKNZCBS is launched.

The GMCA has published guidance on the application of its approach to net zero. These are considered in the following pages.



Sustainability Strategy

Net Zero in Operation

The GMCA Net Zero Design Guidance states that for Applicants to comply with Policies JP-S2 and JP-S3, all new buildings should be designed and built to be Net Zero Carbon in operation in compliance with the following where practical and viable:

(a) Fabric efficiency

- Space heating demand of ≤20kWh/m2/year for houses; and
- Space heating demand of ≤15kWh/m2/year for flats.

(b) Energy use and carbon emissions

- BREEAM 'Excellent' standard (or equivalent) for the 'Ene 01 – reduction of energy use and carbon emissions' credit issue is achieved, rising to BREEAM 'Outstanding' equivalent from 2028.

(c) Energy Use Intensity (EUI)

- EUI of ≤35kWh/m2/year for TANZ homes only; and
- EUI to be calculated using appropriate methodology e.g. CIBSE TM54.

(d) No fossil fuels and low carbon heat

- The energy strategy will be all-electric to ensure that energy demand is met through the increasingly decarbonising electricity grid; and
- It is expected that heat pumps will be used to deliver the space heating and cooling demand.

(e) On-site renewable energy generation and energy balance

- Roof mounted solar photovoltaics will be prioritised; and
- Residential development should aim to provide PV equivalent to 40% footprint area.

(f) Offsetting (as last resort)

- To be used where practical and viable via a fund which will be developed by Bury Council; and
- It is not expected that emissions associated with unregulated energy will be offset.

Additional requirements listed within the GMCA Net Zero Design Guidance include:

(a) Upfront embodied carbon reporting
(See *Net Zero in Construction* in the next page)

(b) Overheating risk reduction

- Residential uses should avoid mechanical cooling; and
- Non-residential uses should pass CIBSE TM52.

(c) Reporting energy consumption in-use

As the GMCA Net Zero Design Guidance is not incorporated into PfE, the targets included are aspirational but will be used to guide the design and construction of new developments. The exception is the space heating demand targets, which are included within Policy JP-S1 as best practice thresholds and will be applied where practical and viable.





Sustainability Strategy

Net Zero in Construction

The GMCA Net Zero Design Guidance includes aspirational targets for residential development as follows:

- 500kgCO2/m2 for homes; and
- 600kgCO2/m2 for flats.

No targets are provided for non-residential development.

Reductions in construction carbon will focus on material efficiency (e.g. 'use less') in the first instance, before exploring the use of low carbon and innovative materials.

Carbon Offsetting

Where a development cannot achieve net zero requirements or targets, carbon offsetting will be considered; this involves a financial contribution to mitigate or compensate for the effects of unavoidable carbon emissions by investing in an off-site scheme which reduces or removes greenhouse gases elsewhere, such as tree planting or renewable energy.

In collaboration with the GMCA, Bury Council is developing a Carbon Offset Fund to enable applicants to contribute to and achieve Net Zero Carbon where practical and viable.

Heat and Energy Networks

The JPA7 Allocation Site falls within the Bury Town Centre Heat and Energy Network Opportunity Zone.

Initial analysis shows that a district heating system(s) is not likely to offer advantages or carbon savings as individual heat pumps will deliver better environmental performance, lower overall cost and be more flexible to phasing.

As part of any reserved matters and detailed applications, a Low Carbon Heat Appraisal will be prepared setting out a comparative analysis of feasible heating systems, and proposals for a heating strategy which is practical, financially viable, and delivers carbon savings over the course of its operation.

Opportunities for smart energy networks should also be considered, including:

- Energy demand and generation balance;
- Energy storage;
- Microgrid(s); and
- Electric vehicle charging strategy.



Resource Efficiency

Circular economy is a key part of GM's ambition to be a carbon neutral and leading green city region by 2038, and Northern Gateway will have a role in supporting this.

PfE Policy JP-S6 (Resource Efficiency) requires development to use sustainable design and construction techniques to reduce carbon emissions, adapt and future proof to the impact of climate change, reduce and recycle waste and minimise water use.
It is expected that circular economy measures implemented in the development will include, but are not limited to:

- Material efficiency, minimising the quantity of materials used in construction;
- Use of recycled materials and materials with a high recycled content;
- Use of materials which can be repurposed or recycled at end of life;
- Resource (energy and water) efficiency measures during construction and operation; and
- Reduction of waste generated during construction and operation, and diversion of residual waste from landfill.



Sustainability Strategy

Climate Resilience

GM will experience changes to the climate in the future, including:

- Increased annual temperatures;
- Increased winter rainfall; and
- Decreased summer rainfall.

Impacts associated with these changes to climate and measures to mitigate them are set out within PfE Policy JP-S4.

Development will need to demonstrate how climate adaptability and resilience measures have been incorporated, through design measures which are appropriate for the Elton Reservoir site. Design measures expected to be implemented on site include:

- Reducing overheating risk through passive measures in the first instance, using active cooling where necessary;
- Reducing flood risk through Sustainable Drainage Systems (SuDS), without significantly increasing embodied carbon emissions;
- Incorporating green and blue infrastructure to mitigate overheating, flood risk, and contribute to biodiversity;
- Minimising water use during operation through reducing water demand and incorporating rainwater or greywater harvesting; and
- Appropriate landscaping strategy which suits current and future climate scenarios and doesn't rely on mechanical irrigation.

Environmental Accreditation

PfE Policy JP-S2 requires any non-residential development should achieve a minimum of BREEAM 'Excellent' standard (or equivalent) for the 'Ene 01 – reduction of energy use and carbon emissions' credit issue, rising to BREEAM 'Outstanding' equivalent from 2028.

BREEAM provides a holistic approach to demonstrating sustainability, including categories in Energy, Water, Materials, Waste, and Pollution. The assessment process provides a robust approach to carbon and energy, resource efficiency, and climate resilience.

Applicants are therefore encouraged to pursue certification under BREEAM for non-residential uses over 1,000sqm.

Where feasible and viable, additional accreditation is encouraged to demonstrate the sustainability credentials of the site.



Chapter Ten

Scheme Benefits

Social Benefits

Around

3,500

High Quality New Homes

Active Travel Routes Network

A comprehensive, safe and attractive network of paths connecting to key destinations, in and around new development

3 New Local Centres

With community and health facilities, services and amenities

New Metrolink Stop at Warth Fold

Connecting the new development to the sustainable transport network

1 New two-form entry Primary School

With potential to be extended to three-form entry

Recreation Facilities

Making new development a destination by enhancing water assets for nature and recreation

Environmental Benefits

Over

160 ha of **Open Space**

Including a rich mosaic of multifunctional landscapes for people to enjoy and nature to prosper

Biodiversity Enhancement

Protecting and enhancing existing habitats and creating new opportunities for wildlife to thrive

Mitigation for Potential Flood Risk

In addition to a site-wide strategic drainage strategy

Economic Benefits during Operational Phase

7,730

Residents

3,420 of whom will be in employment, enhancing the economic competitiveness of the local economy

£7.8 million

Public Sector Revenue

From Council Tax and Business Rate payments to be collected by Bury Council

Supporting
180 **Gross FTE on-site jobs**

Across a mix of uses within the local centres

£111.2 million

Resident Income

Increasing local spending power

470

New Retail and Leisure Jobs

Supported by resident expenditure

£71 million

Resident Expenditure

On retail and leisure goods and services

£9.7 million

Economic Boost

Per annum including £6.5 million concentrated in Bury

Economic Benefits during Construction Phase

£££

40 **Gross Jobs**

Full Time Equivalent (FTE) jobs supported on average during construction

Generating
30 **Net Direct Jobs**

Within Greater Manchester, of which 15 FTE jobs filled by residents of Bury

Plus
15 **Net Indirect/ Induced Jobs**

Within Greater Manchester, of which 5 FTE jobs filled by residents of Bury

£63 million

Economic Boost

During the construction period including £48.6 million concentrated in Bury

Chapter Eleven

Social Value Strategy

Social Value

Social value is about the positive impacts that can be delivered in society and is measured by the actions taken to improve community benefit.

There are notable inequalities within Bury's communities around levels of deprivation, health and life expectancy, employment, and educational attainment. The development will help to address these and can deliver social value for local communities. Requirements for social value in planning have the power to unlock additional community benefit from the development which can contribute towards addressing some of the deep-rooted inequality.

To help to address issues around inequalities, it will be necessary for new development on the site to take all practicable measures to maximise its wider social value and its contribution to social inclusion. Opportunities to deliver social value through new development arise in both the construction and operational phases.

A key aspect of this is economic inclusion and ensuring that residents have the opportunity to share in the benefits of development and economic growth. For example, new development that includes effective initiatives around economic inclusion could help residents into employment and/or training, helping to tackle deprivation by raising people out of poverty and reducing inequalities, whilst benefiting the development directly through improved access to a larger, healthier and more highly skilled labour supply.

Planning applications for new homes within the Elton Reservoir site will be expected to be supported by a Social Value Strategy. The production of a Social Value Strategy provides a mechanism for thinking about how social value and social inclusion can be maximised, securing the implementation of suggested measures and enabling the public to understand the positive impact that new development will have on their neighbourhood and community.

The Council will positively engage in the production and implementation of Social Value Strategies, but the involvement of other stakeholders, including local residents, is also strongly encouraged in order to maximise their impact and the acceptance of new development.

Monitoring & Review

This draft ERDF provides a clear vision for the delivery of the Elton Reservoir site. However, if circumstances change and have implications for the vision, design and development principles set out in this document, then a review of this document will be appropriate.

The scope and content of any review would be agreed and the updated ERDF would be subject to a proportionate statutory and/or public stakeholder consultation prior to it being finalised.

Bury Council

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