



# North West in 2018

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Editor  
Place North West

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Place North West is a business-to-business website for property and regeneration professionals.

We publish news, commentary, event listings, job vacancies and in-depth special reports as well as delivering conferences and social events across the North West.

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Hello, and welcome to North West in 2018, a special publication from Place North West.

The series first appeared on the Place North West website during December 2017, as a selection of prediction pieces to prepare readers for some of the opportunities and challenges which lie ahead in the next 12 months.

The eagle-eyed among you may notice something significant about this series - all of the authors are women. The property and construction sector has traditionally struggled with gender diversity, and while it is making strides in the right direction, we decided it would be right to provide a female-only platform to give prominence to some of the many brilliant women in the industry.

I hope you enjoy reading the articles, and that the year brings you as much opportunity and potential as our contributors suggest.

**Lambert  
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Lambert Smith Hampton is a commercial property consultancy, working with investors, developers and occupiers in both the public and private sectors across the UK and Ireland.

Lambert Smith Hampton advises on over £5bn of property annually, covering all areas of commercial property, from capital markets and construction consultancy, to management of the most complex property portfolios.

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## Stretching skylines

Manchester as a place has been transformed over the past two decades and the pace of change continues.

Cranes – that barometer of developer and investor confidence – puncture the skyline as new buildings go up to provide both homes and offices.

Joanne Roney  
Chief executive  
Manchester City Council

Our next challenge is how we help reconnect this thriving city centre to new and existing communities, expanding the economy of the central core to support the growth of new neighbourhoods that will help to meet the huge demand for new high-quality housing.

We have the opportunity to do this at scale through the unprecedented potential of the Northern Gateway.

This sweep of the city from Victoria station to the Intermediate Ring Road at Queen's Road, incorporating the neighbourhoods of the Lower Irk Valley, New Cross and Collyhurst is one of the largest urban regeneration opportunities in the UK, where at least 10,000 new homes will be built in the next 10 to 15 years, creating new communities and expanding existing ones.

Across 300 acres of developable land, we have our biggest opportunity to meet the city's residential growth demand through a range of sustainable, mixed-use neighbourhoods, with fantastic connectivity to jobs, leisure and culture.

Work is already underway to begin this transformational change. In April we signed a joint venture partnership agreement with the Far East Consortium with the first 12 development plots identified.

A world class masterplanning team has been assembled and the first ambitious proposals to unlock the potential of the area are starting to be explored and we will shortly be sharing these ideas with local residents and other stakeholders to hear and incorporate their views. The masterplanning team includes Farrells, Turner & Townsend, HOW Planning, Planit-IE, Arup, Regeneris, and Buro Four.

The Northern Gateway is an area of vast natural assets such as the Irk River valley basin, open green space and woodlands, as well as important infrastructure such as Metrolink.

Our ambition is to create a world-renowned example of urban planning, where green public space is integral around high-quality public

facilities including new schools and public realm, all serviced by excellent walking, cycling and public transport links.

The new homes themselves will be designed to be as sustainable as possible, incorporating state-of-the-art technologies to ensure the lowest carbon footprint and supporting the environmental ambitions of Manchester – marking a blueprint for low-carbon housing elsewhere in the city.

Close to the city centre and employment opportunities, the Northern Gateway should help to retain residents in north Manchester while attracting a groundswell of new residents and families who are key in creating that sense of place that helps build successful communities.

Manchester's population is forecast to reach 600,000 by 2021, with the wider city centre expected to grow from 54,000 to more than 80,000 by 2024 – another 26,000 people in just seven years. We have to ensure we have the right homes and social infrastructure to support this economic growth and the right partners to help us to continually grow and evolve and offer a great quality of life for everyone.

The first phase of the Northern Gateway is the development of four buildings around the historic open space of Angel Meadow by Far East Consortium. The scheme will deliver 756 new homes and just as importantly open up the park and surrounding streets to expand the Northern edge of the city.

Work on the first buildings will start next year and they will be a benchmark for the standard of placemaking to come.

The Northern Gateway is a key part of the city's residential growth strategy for the next decade, one that aims to attract more families to live and stay in the city. It is an opportunity to create a bold new vision of urban living and we are determined to deliver that, and deliver it well.





## Building a knowledge network

In recent years, the benefits associated with collaborative working have become prevalent, particularly in the science and tech sectors, and we're continuing to champion this at Sensor City.

Alison Mitchell  
Executive director  
Sensor City

Sensor City is the hub for sensor technology development and growth based in Liverpool. The building is designed to encourage the sharing of ideas and knowledge, and coupled with our lab facilities, this will help SMEs involved with the Internet of Things and sensors progress their concepts to prototype quickly and effectively.

Since our first tenants arrived earlier this year, we've seen them make the most of the knowledge, skills and networks available. The communication and ideas that have evolved between these forward-thinking tech companies has been inspiring. By clustering together in one purpose-built environment, our tenants and members are beginning to visualise how their products and concepts can be improved through the sharing of ideas.

But our focus is not only on collaboration within the building itself. Sensor City is strategically located at the gateway to Liverpool's Knowledge Quarter, a £5bn vision which will see a concentration of expertise and ground-breaking innovation take shape within a 400-acre area of the city centre. The Knowledge Quarter already encompasses the two city centre universities, Liverpool School of Tropical Medicine and the new Royal Liverpool Hospital, so we're in fantastic company.

Sensor City and its tenants will benefit from, and be very much a part of, this community of scientists, inventors, academics and students who are at the forefront of discovery in science, health, technology, culture and education. This supportive community will see companies and organisations co-exist and grow together in a unique way.

A key element of the Knowledge Quarter will be Paddington Village, a £1bn development comprising state-of-the-art labs, teaching spaces, shops, restaurants and a hotel at the eastern part of the city. A new train station at Paddington Village will link the district to the city centre, making its unrivalled facilities and innovation spaces even more accessible.

Focusing on collaboration and offering the very best facilities, the city will be in a position to build an exceptionally strong collective of innovators, retaining the very best talent and closing the economic gap between Liverpool and London.

Sensor City is a joint venture between the University of Liverpool and Liverpool John Moores University, which successfully bid to create the city's first University Enterprise Zone. The building presents an excellent opportunity for the universities to exchange knowledge with SMEs and also offer further facilities to these businesses. The relationship works both ways, with students and graduates getting the chance to use our world class equipment and lab spaces and learn from our experts and to work with companies.

By sharing ideas and facilities, and offering each other support, those setting up base in the Knowledge Quarter are showing how businesses, organisations and individuals, of varying types and sizes, can work cohesively towards the common goal of discovery.

The regeneration and reinvention of this area of Liverpool is extremely significant not only in its physical addition and resource for the city, but as a catalyst for collaborative working and a focal point for growth and investment.

Sensor City and the Knowledge Quarter can lead the way in creating products and ideas that propel Liverpool onto a global stage in science and technology, a place it wholly deserves to be. The infrastructure and talent is here and 2018 is going to be a very exciting year for innovation in the North.



## The land canyon

This year needs to be the year we make a concerted effort to drive housing supply and do more for our communities, but there are many challenges, not least access to land.

Deborah McLaughlin  
Managing director of real estate projects  
Capita Real Estate & Infrastructure

The industry needs better incentives to build beyond greenfield sites and we must become more imaginative about potential housing sites. Looking differently at the potential of under utilised land, brownfield sites, sites around transport hubs and stations will be key.

We desperately need to bring many of our brownfield sites back into productive use. The latest figures I've seen suggest there are 163,000 acres of brownfield land available – half of which is obsolete. Surely developing these sites has to be a priority for the sector, supported by central Government through initiatives focused on enabling supply. If an amount similar to the £10bn announced for Help to Buy were to be invested into addressing the challenges of brownfield sites that would really drive supply in sustainable areas.

An effort at this scale would release land for hundreds of thousands of new homes. Most local authorities are working on their brownfield site register. Completing the register is a Government requirement but to make a difference there has to be more than just a register. I'm confident that where we have proactive, pro-growth local authorities, they will work with partners to create portfolios of sites, possibly with Government funding such as the housing infrastructure fund, to bring these sites to market.

Many of these locations are small infill sites and with support, are ideal opportunities for local and regional housebuilders and housing associations to develop which is great for the local economy as well as for housing delivery – a win-win.

New entrants to the housebuilding market must be encouraged, especially SME businesses who have yet to return to the industry since the downturn in 2008.

These SMEs will need the appropriate support from larger influencers in terms of accessing and capitalising on modern methods such as modular home construction, SMEs can and will play a complementary role to the larger players.

Finally, there are further opportunities for collaboration at scale. Developers need to collaborate and challenge the public sector to release underused public land for development – offering a fair return, quality and value to the public sector. There are significant public sector opportunities that need private sector collaboration, including new transport hubs being created in the North West and across the country.

With the progression of HS2, these hubs are ideal spaces for new high density, accessible, affordable modern housing.



## Thinking outside the cubicle

Manchester goes into 2018 on the back of a record-breaking year of deals, which is expected to total 1.4m sq ft, having outperformed the last three years for office take-up.

Gayle Taylor  
Head of North West operations  
Lambert Smith Hampton

The city can expect to see continued rental growth, rising from £34 to £36/sq ft, with grade A demand outweighing supply and the increase of other high quality developments.

There will be continued focus on the office product itself, with location a more subjective and footloose requirement, and as such rents will become less location-specific. However, enhancements to local infrastructure such as the Ordsall Chord, will help to influence location as a choice and support wider development across the city centre area.

There will be a focus on ongoing refurbishment of existing stock as landlords and investors try to capitalise on the absence of any new grade A supply coming to the market in 2018. We expect this to push rents up by 5-10% and keep incentives down at pre-recession levels with greatest uplifts seen in the remodelled grade A sector, rather than new build.

Refurbishments such as Windmill Green and others in Manchester city centre, show what is possible in reinvigorating secondary stock and it's likely that other institutional investors will follow suit in search of greater asset management opportunities.

The rise of the technology, media and telecom sector and northshoring will continue to make demand for traditional office space wane as the modern occupier wants more, particularly in relation to technology. We're already seeing this, with growing interest in buildings with Node functionality – instant 'plug-and-play' capability for broadband and phones – as those on the move expect to be up and running quickly.

The ongoing diversification of occupier trends will continue in earnest too, as the growing popularity of co-working operators creates demand for something more dynamic and collaborative. We're already seeing this with a number of landlords turning previously vanilla reception spaces into vibrant shared amenities in order to activate and animate their ground floor frontage.

The appetite for smaller flexible spaces will stay strong, accounting for 80% of the market, although this will not only come from start-ups and instead will include more established occupiers wanting to reduce their balance sheet liabilities, mitigate risk and build more flexibility into their operations.

Although London is at saturation point for co-working, Manchester is ripe for opportunity. However, until there have been enough transactions and success stories, landlords won't be fully confident of the risks or returns of this model.

Next year will see that change, with much greater co-working activity in Manchester city centre.



## Where there's a mill, there's a way

Picture this: it's the close of 2018 and the grand re-opening of Sheppard's Mill in Greatown.

Catherine Dewar  
Planning director for the North West  
Historic England

It's an old, hulking textile mill, one of the former northern powerhouses of the North West. This large brick building of four storeys sits proudly in the townscape, its chimney a local landmark and, with both imagination and determination, it's been brilliantly converted to apartments. The opening is attended by the Mayor, Government housing and cultural agencies and the leader of the local authority. We're all celebrating the re-use of this wonderful building – and there is good reason to celebrate.

The ground floor of this huge industrial building had been used for many years as a storage depot, but the upper floors were left vacant. The rental income didn't cover the cost of maintenance, so it gradually declined and began to attract anti-social behaviour. For the locals, this place which was once part of a powerful industry had become a sad and sorry sight. But today we're here to see the ribbon being cut at the first newly converted apartments, which are stylish, affordable and within easy commuting distance of Manchester.

Ok, so this isn't a real place, but the story will sound familiar to many across the region. So why couldn't a successful regeneration like this happen?

At Historic England we are thinking carefully about the future of the North West's textile mills. We've been working with Salford University and Cushman & Wakefield carrying out research into the potential to re-use the region's historic textile mills and whilst we've lost almost half in Greater Manchester alone since the 1980s, there are still many left.

There are nearly two million square metres of vacant floor space in textile mills across Greater Manchester and Lancashire, which is equivalent to 25,000 homes. We believe that mills can and should accommodate the North West's growth needs, whether that is housing, leisure or light industrial uses. They have a place in our future.

Investing in industrial heritage can help with area-wide regeneration, playing a strong role in placemaking and local identity.

We've commissioned YouGov to poll people's attitudes to mills and we know that 89% of North Westerners agree that historic mills are an important part of the country's heritage, story and character, with 78% thinking that historic mills are as important to preserve as castles and stately homes. We also know that 85% of England's population says they are against demolition and replacement of mills. So, whilst people are concerned about the condition of their local mills and the anti-social behaviour that any vacant building can attract, people do value their industrial heritage.

We have evidence that we can all visit to show that this is possible. There are some incredible examples of where historic mills have been brought into imaginative re-use. Holmes Mill in Clitheroe is now a brewery, restaurant and hotel. The Cotton Works in Bolton has been converted into homes and English Fine Cottons are spinning cotton in Tower Mill in Dukinfield. People are living, working, playing and exercising in converted mills across the region. That's why we need to start a wider conversation about our textile mills. Watch this space.





## Cultural evolution

Skills shortages, lack of diversity, recruitment by type. We've all heard the criticisms and challenges about the property, construction and engineering sector.

Anita Singh  
Land quality consultant  
Hydrock

To many, the sector can lack appeal and appear unwilling to break away from a certain socioeconomic demographic. Why is this?

The simple answer might be that many people don't even know that certain occupations exist within construction and property. Nationally, many companies are on a drive to go into educational establishments and 'spread the word'. That's great, but what other explanations could there be?

I think we have an image problem, and let's face it, there's a reason for that. It's a problem that extends to people leaving the industry because of the environment and culture.

Partly it's an inability by some people to recognise that working practices and society have changed and that not everyone thinks and behaves in the same manner. The more I explore this, the more I realise that some people genuinely don't realise that what they're doing and saying is inappropriate and alienating, causing other people to feel awkward and marginalised at work, in meetings, or even just out and about in the industry – creating the 'out crowd' as opposed to the 'in crowd'.

So how do we address these outdated behaviours and views, if the power of 'group think', the 'in crowd', means they don't realise the impact they are having?

We're seeing the impact of bad pervading cultures in the high-profile worlds of Westminster, the BBC and Hollywood. But we're also seeing a response, a willingness to speak out and a willingness to change through high-profile hash-tag campaigns such as #metoo and #howiwillchange.

Thankfully, action in our own industry is increasing; organisations are making a determined effort to recruit from a more diverse pool, welcoming different opinions and talents to make our outputs more inspiring and eye-catching. I believe education is key, and perhaps we should make appropriate behaviour a part of the induction process for our organisations.

So, what does an attractive workplace environment or culture look like?

In the modern-day workplace, how much should we actually care about what someone is wearing, where they were sitting or at what time they actually did the work, as long as they delivered a competent, fit-for-purpose product as specified, and worked well within their team, creating respect and being respected?

The demand for this environment and culture is not an experiment, or simply mimicking other industries – this is evolution. It just so happens that our industry has been lagging behind in embracing this, although I appreciate that not all role types in construction can accommodate this level of fluidity.

Greater diversity will bring a change to business culture. And the result? A positive effect on employee loyalty, satisfaction, productivity, retention, engagement. A sense of belonging as opposed to a sense of needing to fit in to avoid being in the 'out crowd'. Ultimately, it's a positive impact on the economy which is a win-win for everyone in property and construction.

If you can create an attractive place to work, the people will come, irrespective of background.

My predictions for 2018 are:

- Companies will undergo cultural evolution, or be subject to Darwinism
- The industry will reap the benefits
- Organisations with outdated behaviours will be called out
- Hopefully we will deal with the point above better than Westminster
- The change in our industry culture will be noticed, and we will attract more people

There is a lot of work to be done, but in the North I believe we have a distinct advantage: we're renowned for our ingenuity, ability to adapt and inclusiveness. We can be that best practice example.





## Bright future

A little over a year ago, I took up the post of chief executive for Lancaster City Council. Driven by action, real collaboration and seizing opportunities, the area's potential is becoming a reality.

Susan Parsonage  
Chief executive  
Lancaster City Council

The Council has made economic growth a priority. We are investing in the future to create business growth, attract investment and develop the skills needed in the area, matched with a big commitment to the visitor economy.

The opening of the Bay Gateway in 2016, has led to a growth corridor from the M6 to the Port of Heysham which opens up a wealth of possibilities in the area for international trade to places like Ireland and beyond, demonstrated by recent investment from Peel Ports, Surefreight, and Seatruck.

On top of this, the Council is facilitating regeneration in this strategic location to help create employment areas, including a focus on the technology and energy sectors.

The district's recently created partnership of Coastal Community Team majors on new tourism opportunities for Morecambe and Heysham, in particular heritage-led regeneration.

Working with British Land, we're progressing proposals for the long-awaited Canal Corridor North development in Lancaster – a once-in-a-generation opportunity. This will see the transformation and building of a new retail and leisure quarter for the city, which compliments the historic roman city and castle and helps magnify the cultural offer.

A significant part of the project is the development of a unique arts and cultural facility to anchor the overall scheme, which will build on our burgeoning reputation as a district of artistic repute. The Council will take final decisions on detail in the new year with a planning application for the development expected in 2018, with a start date of 2021.

A key partner in the proposals for the Canal Corridor North is Lancaster University, who also want a great place with a special regional offer to complement the fantastic success of the university.

The university is a partner in the development of proposals for a Garden Village at Bailrigg, adjacent to their campus. This provides an opportunity to design a new settlement from the ground up and will perfectly complement the university's Health Innovation Campus and its promise of a world-class centre of excellence for innovation and research.

There's no doubt that the future is bright and our unique position, not only as a key growth centre for Lancashire but also as an important part of Morecambe Bay, is a great advantage.

This is reinforced by the three leaders of Lancaster, Barrow and South Lakeland Councils signing up to work more closely on economic development opportunities.

A historic city, beautiful coastline and incredible rural spaces combine to provide a stunning location whilst our heritage, arts and culture sets the area apart.

We have fantastic partners locally, across Lancashire and around Morecambe Bay, and together we are creating a great and thriving place.



## Reimagining our airports

When people think of airports, more often than not, they think of somewhere they travel through, not to.

Lynda Shillaw  
Chief executive  
MAG Property

With more than 250 million passengers using UK airports each year, it's an easy association to make, but with a significant proportion of airport turnover generated by commercial activity in the business-to-business sector, airports are home to a thriving network of diverse operations. But it's not just access to airside facilities that make airports useful places to operate. Increasingly, they're commercial destinations in which people choose to do business.

In addition to passengers, UK airports handle more than two million tonnes of freight annually, provide 960,000 jobs and contribute an estimated £52bn GVA to the economy. The exceptional benefits global occupiers like this bring are clear, but it's the ability of airports to serve as platforms for regeneration that makes them particularly valuable to the wider economy.

Change has become the new normal, with one side-effect being that work is increasingly something people do, rather than a place to go. This means the physical locations and places of work that do serve as communal hubs are having to accommodate the shifting expectations and working practices of those staff that interact with them.

Within the North West at Airport City Manchester, where almost one million sq ft of logistics space and 3,000 jobs have been created, we have a great opportunity to deliver a positive and lasting impact in the community. The completion of the new £15m link road unlocks land on which brand-new offices, hybrid facilities, hotels and leisure space will be built, brings many more opportunities and high-quality jobs to an area of outstanding connectivity and aspiration.

It's not just about developing infrastructure and creating brilliant buildings. A conscious decision to invest early in the social and community fabric of Airport City Manchester gives occupiers, visitors and local people the chance to form a connection from the outset. An interactive event space encourages users to enjoy a wide range of pop-up activities from food, drink and entertainment, to education, talks and product launches.

Alongside sits an emphasis on health and wellbeing, to enable and promote a happier and healthier workforce and community. Cycling is at the heart of this, with high quality changing, storage and bike hire being complemented by safe and enjoyable routes to connect key locations; all designed to encourage a culture of cycling locally and beyond.

By understanding what's important to a new generation, we are helping create a sense of place by proactively orchestrating the facilities, networks, activities, opportunities and attitude for great things to happen, far greater than those that would be realised by people and organisations working in isolation of each other.



## What a Labour Government would mean for housing

Following a remarkable general election campaign and declining Conservative support, there is a real possibility that we may have a Labour Government within the next year.

Rebecca Eatwell  
Managing director  
Newgate Communications

So, what would that mean for the housing sector? Labour pledged in its general election manifesto to build more than a million new homes. It sounds great but the issue with housebuilding is not about setting targets – which Governments invariably miss – but about tackling the barriers to delivery.

The Labour party wants to create a new Department for Housing to address the housing crisis. What this would look like and how it would deliver against the ambitious targets remains to be seen.

What we could expect is investment and new powers to increase Council house building programmes. Corbyn has pledged to remove restrictions and begin the biggest council building programme for at least 30 years. There would undoubtedly be stricter targets for affordable homes. If Mayor of London Sadiq Khan's ambition for 50% affordable is anything to go by, this could have wide reaching implications for developers across the North West.

Greater Manchester Mayor Andy Burnham swept to victory on a pledge to build more affordable homes and has already reportedly come to blows with Manchester City Council over its strategy to build upmarket homes in the centre and cheaper homes elsewhere.

Many towns and cities across the North West have been transformed by private-led regeneration schemes. But this could all change under Labour with Corbyn pledging to stop regeneration leading to the 'gentrification' of an area. He plans to compel councils to ballot all tenants and leaseholders before any regeneration can take place and give all tenants on a redeveloped site the right to move back to the same estate, on the same terms and conditions.

There will be many concerned that this will kill some regeneration schemes off before they've even started.

Corbyn has also pushed back against foreign investors – an issue which has been high up the agenda in Manchester. Earlier this year developers Capital & Centric garnered national attention and queues round the block when they gave local people 'first dibs' on their Crusader scheme near Piccadilly.

Perhaps the most controversial announcement was Shadow Chancellor John McDonnell's party conference speech where he outlined Labour's intention to nationalise various industries, including construction, which according to the CBI would see investors 'running for the hills'. Elsewhere at conference, there were some pretty strong commitments made including rent controls in cities, a tax on landbanking by big developers, and forcing slumlords to bring their homes up to scratch.

There is a lot in Labour's proposed policies that could cause concern for the housing sector, however maybe a radical approach is what the industry needs? Shadow Housing Minister John Healy has said that the 2017 Manifesto holds true but, as with any party in opposition, the reality of Government may see some of it watered down.

What's important now is for the industry to provide the perspective of the business community as Labour works up its agenda for Government so that if Corbyn manages to pull off one of the biggest turnarounds in history we can all move forward in tackling the housing crisis.





## The science of growth

A not-so-quiet revolution is underway across Cheshire and Warrington which looks set to continue at pace throughout 2018.

Heather Standidge  
Associate director  
Cushman & Wakefield

Long overlooked by many as a dairy farming mecca, the home of footballer's wives or a dormitory to the major urban centres of Manchester, Liverpool and Chester, Cheshire's strong and very real economic strengths are starting to get noticed nationally and internationally. In particular, its enviable assets for businesses within a number of key growing science-based sectors.

The pace of economic growth over recent years has been impressive. When the Cheshire & Warrington Local Enterprise Partnership was formed in 2012, the aspiration was to grow the sub-regional economy to £26.6bn GVA a year by 2021. By the close of 2015, this figure had already been exceeded by £1bn, creating 33,000 new jobs over the period. Reflective of this, the revised target is to double the size of the economy to £50bn by 2040, as set out within the refreshed Strategic Economic Plan.

Cheshire and Warrington already have the key ingredients in place to achieve this ambition, including above average GVA output and educational attainment; international occupiers and established clusters in key growth sectors; and a strong supportive quality of life offer.

Looking forward to 2018 and beyond, Cheshire will continue to build on these competitive advantages with a particular focus on its high value science sector strengths with the greatest potential to contribute to economic aspirations.

The Government-backed Cheshire Science Corridor Enterprise Zone backs this strategy, providing significant financial and market incentives to attract science-based businesses to some of the area's key sector focused employment and development clusters including nuclear, energy, advanced manufacturing, automotive and life sciences.

The Government is increasingly recognising Cheshire's innovative approach to solving some of the key national challenges identified within the recently released Industrial Strategy. For example, the launch of the UK's first Energy Innovation District spanning the industrial heartland from Ellesmere Port towards Runcorn aims to secure low carbon, low cost indigenous energy to intensive users.

The British Geological Survey has also announced Ince Marshes as the preferred location for a new underground observatory researching natural heat and energy sources. Further public and private investment is likely to be focused on advancing such proposals over coming years.

The Industrial Strategy's Life Sciences Sector Deal will also serve to reinforce Cheshire's established life science cluster which includes global brands such as Astra Zeneca. Alderley Park has successfully attracted a number of significant high profile occupiers and supported the growth of new start-ups as it progresses its transition to a multi-occupancy science park seeking to retain and maximise the skills and facilities on site.

As skills, innovation and collaboration become increasingly important to globalised businesses, the cluster is anticipated to grow. However, the announcement that insurance firm Royal London will take space at the Park also acknowledges the prospects for diversification and attractiveness of the wider offer.

We also expect to see continued market confidence and the delivery of a pipeline of new employment floorspace in more traditional employment areas such as Ellesmere Port where a significant volume of space has been delivered speculatively and taken up over the last 18 months by occupiers, particularly within the advanced manufacturing sector, seeking affordable efficient space with good accessibility to labour, supply chains and customers.

This year saw the purchase of the very successful Birchwood Park by Warrington Borough Council. As the public sector takes an increasingly proactive role in generating their own revenue streams and supporting job creation, it is anticipated that similar transactions will follow suit across Cheshire and further afield.

Finally, as businesses become increasingly globalised and confidence rises, expect to see an enhanced profile at the international scale as Cheshire and Warrington seeks to compete for, retain and maximise investment potential, starting with a stronger proposition and larger presence at MIPIM in the spring.



## A regional renaissance

An arts and culture revival is happening in the North West – you can see it, you can feel it.

Jade Chau  
Architect  
Bennetts Associates

Projects already built and open to the public are helping to spearhead the exciting future the North West has in arts and culture.

Chester's Storyhouse is experiencing huge success, having welcomed nearly 300,000 visitors in its first seven months of operation and heading for more than 500,000 in the first year, compared with a business plan projection of 350,000. This £37m centre that combines arts and culture under one roof has become a firm favourite with the local community of Chester. Other successful built projects include Liverpool's Royal Court Theatre and Everyman Theatre, as well as Home in Manchester.

In 2017 Arts Council England awarded a whopping £88m funding to arts organisations in the North as part of their forthcoming national portfolio for 2018-2022. Lots of local, smaller North West-based organisations such as Z-arts in Manchester are finally benefitting from being awarded NPO status, a status which often focussed heavily on arts in London and the South of the UK. Other local NPOs such as Action Transport Theatre in Ellesmere Port have seen their NPO funding increased for the next four years.

Manchester will soon be welcoming a new £110m flagship arts venue, The Factory, on the site of the old Granada TV studios. Dubbed as the Guggenheim of the North, the aim of this ambitious project is to rival performance venues worldwide. This Manchester City Council-backed project shows the importance of arts and culture to the North West local economy.

Oldham's Coliseum Theatre is undergoing a major £27m redevelopment that will see it move into a new purpose-built venue housing both a main house and a new studio theatre. This theatre forms part of a wider vision for a new cultural quarter in Oldham.

Bolton's Octagon Theatre is currently having a makeover, which will see its existing building vastly improved, modernised and enlarged. Arts and culture is an important industry, and it is important that this industry is not London-centric. London's arts industry is overcrowded, which makes it very difficult for younger generations to get established. Adding major new cultural facilities to the North West is going to make it a great place to be and help to ease the pressure in London.

We need to think ahead to the future and be mindful of the younger generations. We need to continue to support British creatives and local tourism, helping to generate local jobs and opportunities, while also providing for local people and communities.

This notion of North Westerners wanting and expecting more from local arts establishments and venues has meant that those who have the means to invest in arts and culture are waking up to demand.

Both local councils and arts funding boards, as well as property developers and arts institutions are attuned to this and are helping to make important changes to the local North West arts and culture industry. It's safe to assume that the North West will be significant culture competition to London and the South.



## Moving forwards

It has been a very busy year working in transport in Greater Manchester and it looks like 2018 will be just as busy as last year.

Nicola Kane

Head of strategic planning and research  
Transport for Greater Manchester

This past year has been dominated by the election of Andy Burnham as Greater Manchester's first Mayor, with a major focus on his transport portfolio. He has already appointed Chris Boardman as his cycling and walking commissioner, and introduced half-price bus tickets for 16-18 year olds, which is being followed by the introduction of half price tram tickets for the same age group in January. Another major landmark was the launch of the 2040 Transport Strategy in February, setting out Greater Manchester's long-term aspirations for delivering a more integrated and customer-focused transport system.

The year also saw the completion of more elements of our major transport infrastructure programme, with the opening of a new city centre Metrolink line and flagship tram stop at St Peter's Square, as well as a new state-of-the-art transport interchange at Bolton and a radical reimagining of Manchester's Oxford Road corridor. We welcomed some major new additions to our transport system, including Mobike which, in spite of some early teething problems, has proven incredibly popular.

And there are more big issues on the horizon for 2018.

Housing delivery looks set to continue to dominate headlines and the planned publication of a new draft Greater Manchester Spatial Framework will focus attention on local delivery priorities. We will continue to work closely with local authorities to understand and address the transport implications of the new plan, building on the framework for sustainable growth we've set out in Greater Manchester's 2040 Transport Strategy. This will include further investigation of the potential for maximising housing delivery close to rail stations and other transport hubs and working with districts on their long-term aspirations for town centre regeneration.

Greater Manchester will also be running a number of cutting-edge demonstrator projects working with national and European partners to understand the potential implications of new technologies for our future transport system. This includes an InnovateUK project to trial autonomous vehicles on the new A6 to Manchester Airport relief route, prior to it opening later in 2018, and running autonomous pods at Manchester Airport.

We'll also be further extending our network of electric vehicle charging points across the conurbation. Transport for the North will become the first statutory sub-national transport body and will publish its strategic transport plan setting out its long-term priorities to 2050 and an outline investment plan, making the case for long-term investment in transport to help rebalance the national economy. In Greater Manchester, we have been preparing our long-term growth strategies to maximise the benefits from the arrival of HS2 and Northern Powerhouse Rail at Piccadilly and Manchester Airport, and we have further growth strategy work planned this year with Stockport and Wigan.

Although 2017 parliamentary activity was dominated by Brexit negotiations, we also saw the enactment of the unglamorous but very important Bus Services Act. The Act gives mayoral authorities powers to reform the bus market and we are currently exploring how this could help us achieve Greater Manchester's ambition for bus services, which account for three in every four local public transport journeys. Andy Burnham has committed to using these powers to "make bus services more affordable, more reliable and more accessible" and reforming bus services will be essential to delivering a truly integrated local public transport network and fares and ticketing system.

Improving air quality and congestion will continue to be a key focus for us and for Andy Burnham. We will be developing plans with our partners to address both issues, drawing in feedback received from over 7,000 respondents to the Mayor's congestion conversation this autumn. Tackling these major issues will require a collective effort, understanding what national and local government, transport operators, businesses and individuals can all do to help reduce the negative impacts of traffic and congestion on our economy, quality of life and environment.

One key opportunity will be to encourage more of the 1.8 million short trips of 1km or less to be made on foot and by bike. Working with Chris Boardman, we'll be developing a cycling and walking strategy and supporting infrastructure plan for Greater Manchester, which will set the scene for continued investment in active travel infrastructure and measures to encourage their uptake.





## E-commerce effect

The industrial market is witnessing a transformation, with significant growth in the e-commerce market meaning that consumer shopping habits are placing greater demands on the warehouse than on the high street.

Ruth Leighton  
Associate  
GVA

This step change means that returns from the industrial and logistics sector are expected to outperform office and retail over the next five years.

The transformation has happened because of changing customer expectations and evolving technology. Both individuals and companies expect to receive their goods faster, within a specific time period and, in most instances, with free delivery.

Examples of companies reacting to this change are Amazon Prime and Uber. Uber has established an UberCARGO van service in Hong Kong as well as UberRUSH, both offering express services by targeting online retailers.

As a result of this changing landscape and the speed at which technology and automation develop, the logistics sector has had to adapt and change.

Following a recent tour of an Amazon Fulfilment Depot, I witnessed how this rapid growth in the robotics market leads to structural changes within the sector, as the workforce has evolved to include more highly skilled engineers who can react to the needs of robotics and automation. To this end, Amazon is looking to install a robotic racking system at its 358,000 sq ft site at Logistics North, Bolton.

Automation is diverse. From delivery drones and container packaging to robotic handling systems, all of which are currently at the forefront of research and development. Google has already started working on a smart delivery truck with lockers inside the cargo area that customers can access, and the trucking industry is working on partially automated truck convoys. Developers are tuned in to the increase in

automation and the changing requirements from occupiers. From a construction perspective, this means that questions arise around the necessary power supply for IT and the running of handling systems. This has implications on floor loading and floorplate sizes. Bespoke mezzanine systems will often be integral with the steel frame rather than a free-standing mezzanine. The demand for these requirements will undoubtedly increase build costs.

Direct take up by internet and courier-based operations has grown significantly over the last few years. This has been growing noticeably since 2014. In the North West, Amazon has an acquisitive year in 2016 with a total take up circa 915,000 sq ft in the region alone. These acquisitions relate to the positioning of the business and its supply chain.

We foresee the continuing expansion of the e-commerce sector and its market share increasing as the internet powers ahead. This will lead to a new generation of warehouses where the specification has been adapted from the traditional shed in order to futureproof the units.

This will mean that the units will have larger yard areas and spaces for parking, as well as the potential for an integrated mezzanine platform to be included. Unit sizes will vary from last mile facilities of 50,000 – 100,000 sq ft.



## Diversifying housebuilding

The Government's Housing White paper included many proposed commitments and policies but what will be crucial in 2018 is the idea of diversifying who builds houses.

Nicola Rigby

Director of planning, regeneration and development  
GVA

In 2018, we will continue to see pressure within the housing market. In addition to the wider macro-economic discussions around inflation and interest rates, with it now just being a matter of time before we see an increase in the latter, a significant factor will without a doubt be the continued pressure on supply.

This issue of diversity is a key part of the answer, and should largely be about mobilising the SME market, but looking ahead to next year I think the emphasis should be much more on both the public and quasi-public sectors and their capacity for the direct delivery of houses for open market sales.

Without oversimplifying the matter, the public sector in its widest definition has arguably unrivalled access to land, both through its existing asset base and its ability to take risk through its covenant strength.

By and large, it also benefits from access to finance through the Public Works Loan Board and existing Government funding streams. It is therefore natural to see increased pressure on the sector to intervene directly in the market – and was certainly the sub-text I took from that particular phrase in the White Paper.

The question into 2018 is whether or not this pressure will result in increased supply. It seems like the answer should be a resounding yes, unfortunately I do not believe it will be quite that simple.

The public sector's seemingly unrivalled asset base is still not fully understood, either in extent or potential, and its willingness to take risk is not consistent and is often politicised at a local level. Where local authorities and Government departments are willing to take risk in direct delivery this naturally needs to be determined to be reasonable.

It is this consideration of risk that brings us back full circle into the wider debate. So, to answer the question on supply we need to first answer whether the public sector can understand or mitigate risk without thinking like the private sector?

In 2018, this debate will hinge on many factors, including an understanding of acceptable delivery rates and dispersed geographies, so as to not flood markets and overexpose the public sector. Another key consideration is that at present speculative housebuilding just doesn't really exist on a large scale in the way it does in the commercial sector, because no company wants to build houses without people wanting to live in them.

Ultimately, in 2018 we need to and likely will see more direct delivery of housing by the public and quasi-public sectors. However, whether this will be as quick as the government hopes, and will ultimately be in a form that is much different (in pace) from the private sector and housebuilder market, remains to be seen.

Either way we are undoubtedly going to see a continued push for the public sector to continue to acquire land for the delivery of new housing in 2018 with the intention of direct delivery. My hope is that this will be undertaken considering these wider market factors – and alongside a thorough review of the existing landholdings across our public estate, which remains for me the missing piece of the whole jigsaw.



## Getting our teeth into tech

Until relatively recently, many shopping centres were strangers to good food and drink. But now it's not good enough just to attract big brand names: food and drink should be a jewel in a shopping centre's crown, and tech can play a role in making that happen.

Kannika Mall  
Asset manager  
M&G Real Estate

Do you remember going to a shopping centre when you were little? Of course you do: traipsing after mum and dad round endless shops that all looked the same, in search of your school uniform or a new pencil case. Still, at least there was the treat of somewhere nice to eat at the end of it, right?

Of course not. The odd elegant bistro at the big department stores, like Lewis's or Kendals, but little else to write home about. You know what happened next: the food court revolution, as we realised that shoppers wouldn't mind a sit down and a bite to eat before the bus home; hot on their heels, the coffee shop and family restaurant. Something for everyone, from Kentucky to the Far East and beyond.

Times they are a-changing. It's not good enough just to attract big names: the best centres mix leading retail, innovative experiences, and that all-important food & beverage proposition. Today, food and drink isn't a way to keep shoppers shopping: we see it as one of the jewels in our crown.

A decent place to eat or have a drink with my friends matters to me. In that respect, I'm like countless others: I'm not choosing where to shop, I'm choosing where to go. That's true all over the North West, especially as improvements to transport mean we're competing in a truly regional market. Similarly, more urban living means we have to fight harder to stand out in a busy, vibrant city. At Manchester Arndale, we combine our own experiences, our asset-management nous, and extensive research to create the kind of destination people want.

Alongside our partner Intu, in Halle Place we are currently developing a modern casual-dining destination due to open in 2018. Halle Place will bring exciting new restaurants and bars to complement our current great line-up and in the true Mancunian spirit, we're not afraid to shout about it. We work closely with our occupiers on creative new ways to attract customers, so make sure you keep your eyes peeled. That means using social media, events and technology, but also a little imagination,

to make sure people come along, and keep coming back for more.

This takes me to the bigger question. At Manchester Arndale, we're not just custodians of the past and curators of the city's present: it's our job to imagine the future, and create what people will want in the years to come.

Manchester's a leading tech and creative hub, and we want to work with talent across the city as we shape the next decade. Think of the power of the technology in your pocket: it's so easy to imagine walking into a 'smart store' that would direct you to jeans and shoes that are to your taste, where drones can take your shopping to your car; or a restaurant where your favourite wine's uncorked as you sit down, and the e-ink menu in your hands already knows what you like. None of this will be tomorrow, but when it, or similar technological advances create such opportunities, why shouldn't it be at Manchester Arndale first?

As an industry, we're at a tipping point where our customers rightly demand more than just shops. It takes retail savvy and something different to stay one step ahead, as well as a commitment to constant improvements. 'Experience' is the operative word.





## A bridge in time

The opening of the Ordsall Chord railway bridge at the beginning of November 2017 was a huge milestone in the Great North Rail Project and in early December the first train crossed the new lines between Victoria and Piccadilly stations.

Bernadette Bone  
Director  
BB Heritage Studio

However, the construction works associated with the Ordsall Chord project are continuing and 2018 will see the completion of equally significant aspects of the project, including completion of repairs to the historic structures and works that provide further connections through the creation of a sequence of new public realm spaces.

Within the overall Great North Rail Project the Ordsall Chord is unique; no other project has comparable functional requirements or aesthetic aspirations. This is due in the most part to the site location which is one of the most sensitive sites in the historic evolution of the railway. The history of the site spans over 200 years and encompasses not only rail transport history but also roads, canals and the navigable River Irwell.

It is a site that contains the world's first inter-city railway and which, from its opening in 1830 onwards, has continually evolved and adapted to changing transportation needs. This has resulted in a layering of railway and other transport structures from the 18th, 19th and 20th centuries with each phase of construction providing an example of the engineering approach of its time. The Ordsall Chord railway bridge provides a distinctive 21st century structure, adding the next layer of rail use onto the history of the site.

Working within this context has involved exceptional challenges, made more intricate by the constraints posed by the requirements of the new railway infrastructure itself. But it has also offered unique opportunities.

A particular opportunity has been led by the historic city wide high level viaducts which owe their origins to the route of the 1830 Liverpool to Manchester railway and the requirement to maintain a clear height over the navigable River Irwell. Whilst the requirement to connect into the existing high level viaducts was a principal design constraint it has provided the opportunity to form a new series of public realm spaces at ground level below.

Stephenson's Bridge, the network arch and a new public footbridge form the setting of a pair of piazzas on either side of the river. From this centerpiece a series of interconnected spaces will lead, connecting key regeneration sites in the surrounding area. These spaces have been carefully articulated so that in each location they respond not only to their immediate context but also seek to enrich the experience of the group of historic transport structures. Structures which were previously in poor condition will now be able to play an active role in the surrounding streetscape and assisted by the conservation led repairs will be accessible for repurposing.

Central to this has been the opportunity to carefully reveal and restore the grade one-listed 1830 River Irwell crossing of the first inter-city railway. The later structure which abutted the bridge has been removed and the radial stone voussoirs and parapet which were lost in the 1860s have been reinstated. The adjacent new public realm spaces which are now starting to emerge on site will ensure that for the first time in 150 years Stephenson's 1830 railway bridge will be visible from the banks of the River Irwell.



## Health check

With more than 90% of health and care leaders saying they're concerned about their organisation's ability to cope with winter demand, 2018 will begin with all eyes on how GP surgeries and A&E departments manage to carry the strain with the resources they have.

Jayne Cottam  
Chief financial officer  
Assura

Predictions of a particularly nasty flu season combined with the statistical realities of an ageing population and the ongoing challenge of recruiting and retaining staff makes for a chilling winter forecast.

GP surgery buildings need to be kept in good condition all winter, so that staff have the modern workplaces and space they need to maximise their opening hours and services to patients.

The Government has set out its next steps to transform primary care, including plans to dramatically increase evening and weekend GP appointments, to encourage practices to work together in networks or hubs and to grow the primary care workforce by 2020. Given the ambitions to increase the numbers of GPs, clinical pharmacists, mental health therapists and physician associates working in primary care by 2020, we should expect to see progress accelerating in 2018.

But with far too many primary care buildings still struggling for space and access, that will mean looking closely at the buildings that will house these services. We expect that message to gain even more traction this year. Locally, Sustainability & Transformation Partnerships, which are bringing together planning for health and care services across 44 different areas of England, have been asked by NHS England to show "concrete progress" by March. Many of their plans highlight better primary care estate as a crucial factor, so we look forward to more detail.

This should also be the year in which we learn more about national plans to improve GP surgery buildings. In March, Sir Robert Naylor recommended that private sector investment could be used to fund this.

Subsequently, we joined with our colleagues in the primary care property sector to flag the collective investment we could make through third party development – more than £3bn.

If there's one New Year's resolution that could really support GPs struggling in unfit premises, it would be that far better information goes to doctors, STPs and Clinical Commissioning Groups on the range of options open to them. With another of those options slated to launch during 2018 (Government's long-promised new public-private partnerships for primary care estate, badged 'Project Phoenix'), better information to help practices make progress on premises would be a simple step which could make a big difference.

Finally, in the North West we'll continue to follow Greater Manchester's progress on NHS estate next year. The delivery of primary care under devolution has already seen huge leaps forward on extended access for patients.

Configuring the buildings GPs will need to help keep up that momentum of change will be a challenge not just for the New Year, but for many years to come.



## Life for rent

The rise of the private rented sector and challenges for younger people to get onto the property ladder have been well documented but as the way we live changes, how will this impact our ageing population?

Liz Brown  
Associate architect  
Pozzoni Architecture

Can architecture play a role in creating residential spaces that more realistically reflect our modern lives?

It's increasingly common for today's working population to rent their homes. Whether it's because owning a home is financially out of reach or it's simply a lifestyle choice to allow for greater flexibility, the private rental sector boom isn't showing signs of slowing down.

Older generations often worry about the younger generations because of this social shift. In 'their day', owning a property was what people strived for. It provided stability, a place to raise a family, security in retirement and a pot of funding that could either be used for end of life care or to pass onto their children. But it's the rental market targeting the older generations where we expect to see the biggest changes within the next twelve months. Countries like Germany are known for their renting culture and it's not just their working and family-raising years that they're spending in rented accommodation; Europeans will rent during their retirement too.

It's slowly becoming more popular for UK retirees to choose a rented home, to enjoy a different lifestyle during their golden years too, for example moving into a city centre apartment to enjoy the high life – possibly literally. Just because someone is older, it doesn't necessarily mean that they want to move away from the vibrancy and amenities that our cities have to offer. As the race for residential space continues and the challenges of accommodating an ageing population increase, don't be surprised to see more high-rise developments dedicated to over 55s.

Whatever the reasons for renting, whether it's by choice or through necessity, one thing that will need to change is how end of life care is paid for. The current care funding system relies on equity in the family home but if that isn't available, where do we go from there? As 'generation rent' gets older, and more people actively choose to rent during their retirement, the system will need to change to create a fair system for all.

That's where we expect to see more reliance on supportive communities and an increase in multi-generational living.

So, what can architects do to help this changing world? Designing homes that allow for inter-generational living and creating neighbourhoods with mixed communities will be key, so it might be time to look once again to Europe for inspiration. An innovative programme in the Netherlands allows students to live rent-free (or at a reduced rent) in a care scheme with elderly residents. In return, the students must commit to spend a minimum of 30 hours per week with the care home residents, reducing the financial burden on their care providers. So, is providing student residencies within a larger care village a way forward in the UK?

A radical scheme such as this may take longer to implement but, as architects, something that we should be looking to do now is designing apartments and houses that are flexible and can adapt to such changing needs i.e. Lifetime Homes standard, so people don't have to move out of their homes as their circumstances change. Incorporating dementia friendly design to help people stay independent in their homes for as long as possible.

We need to seek out the opportunity to understand future trends in the housing market and demographics, to design homes that are flexible and adaptable, set within communities that allow for homes for life to be achieved and provide a more holistic society.





## Transforming our streets

There has been a lot of news recently about the dangers of air pollution, but a potentially even bigger threat to our health is inactivity.

Leah Stuart  
Associate director  
Civic Engineers

Our streets are simply not inviting places. We have prioritised the motor car and marginalised walking and cycling. Some people, who are isolated due to low income, disability, ill health or old age, need considerable courage to venture out onto our streets. We need to make our public realm more connected and welcoming to people of all ages and abilities.

A connected city is vital and with it come huge economic, social and environmental benefits. We are currently working in Glasgow to bring active travel to the forefront of the city's streets, as part of a £115m project to transform the city centre, putting people at its heart. Glasgow City Council see clear benefits in this approach: walking and cycling improves mental and physical health; busy streets strengthen communities, support businesses and reduce social isolation.

It's become clear that our designs need to focus on people who are sometimes forgotten, so we will be thinking about not just the lycra-clad speedy cyclists, but also disabled cyclists, families and cargo bikes. If we can make our streets enjoyable and functional for these people, they will work for everyone, and the economic and social benefits will follow.

This is not just speculation: we have first-hand experience from our work in Altrincham town centre, where we have helped design and deliver an improved public realm. There are measurable benefits from a more attractive and inclusive space: a 20% year-on-year increase in footfall has led to 24 new businesses in the town centre, around 90 new jobs and a reduction in crime and anti-social behaviour.

Manchester as a whole still has work to do, but things are looking promising. Although cycling currently represents just 2% of all journeys, TfGM are aiming for this to increase to 10% by 2025. And it seems there is appetite for change: a recent survey by Sustrans found that 77% of Greater Manchester residents are in favour of more segregated cycle lanes, even if this means less space for traffic.

With a budget of £42m announced to invest in cycling, our own dedicated Cycling and Walking Commissioner and a Green Infrastructure Summit planned for spring, there is a fantastic opportunity to look at the city as a whole and facilitate active travel for everyone.

And with more people getting their 10,000 steps and their 150 minutes of exercise a week, even in the city centre, we will all have a happier and healthier 2018.



## North stars

Clever money looking for a home in the North West need look no further than the 40 square miles of Cheshire and North Staffordshire covered by the Constellation Partnership.

Jackie Sadek  
Chair  
The Constellation Partnership

This is a ground-breaking partnership of seven local authorities and two Local Enterprise Partnerships. Centred on three transport hubs at Crewe, Stoke-on-Trent and Stafford, the mission of the partnership is to capitalise on the massive investment that the Government is making into the national high speed rail network. And, in particular, the HS2 interchange at Crewe.

The Constellation Partnership describes itself accurately as “the place where the UK connects” because of its unrivalled 360 degree connectivity on the national road and rail network. It already contributes £29bn to the UK economy each year, but the vision is that, through HS2, a minimum of an extra 120,000 jobs and 100,000 homes can be created by 2040 across the Constellation Partnership area.

As the chair of the Partnership for the last twelve months (as well as working closely with the partners for two years prior to taking up post) I can see the massive potential of the area. Having worked in London Docklands in the early 1980s, I have seen first-hand what is required as impetus for a game-changing new office location, and Crewe has all the fundamentals in place, and more. In fact I would argue that Crewe is better placed now, than Canary Wharf ever was at the same moment in its development.

HS2 will re-shape the economic geography of the UK and its impact on the Constellation area will be so huge that it really will become a leading economic powerhouse in the UK.

The depositing of the HS2 Bill in parliament earlier this year has given the partnership real impetus (that magical attribute of sheer certainty) and has already resulted in great interest in this area's future, from Stafford, Stoke-on-Trent and Crewe and everywhere in between.

In exactly 10 years from now, Crewe will be 55 minutes from London, 20 minutes from Manchester and 20 minutes from Birmingham. And, crucially, the public sector controls much of the land around Crewe station (and throughout the Constellation conurbation) that could potentially be developed. So I defy anyone to find a better potential location in the country.

From 2027, HS2 will not only deliver a step change in travel times, it will transform access to labour jobs and housing markets, boosting skills and increasing rail capacity for local services and freight. HS2 enhanced infrastructure will build on existing comprehensive transport links to ensure easy access to and across a region that numbers 1.3m people, larger than any UK regional city.

It is hardly surprising then, that I am 100% confident that this programme is going to take off, and truly capture the imagination. I predict there will be a rush of potential investors following the publication of the Constellation Growth Strategy.

Make no mistake, it will be the early bird who will catch the worm. Because the success of this programme is totally assured.



## In with the young

Here in the team working on the Manchester Town Hall project, 2018 is set to be a great year for inspiring young people to follow careers in the built environment, and while doing so connect with heritage architecture.

Nicola Hewes  
Partner  
Purcell

The higher level shared apprentice programme for the project, known as M Futures, will be in full flow this year. It aims to establish young people in the sector and encourage them to engage with their cultural heritage, through the active and vital participation in the refurbishment and futureproofing of one of the UK's most important historic properties. The programme involves apprentices undertaking placements across the range of firms in the project team, including Purcell.

Purcell will be asking apprentices to explore the Manchester Town Hall in full; to enjoy its quirks and features, learn to love and respect its heritage but also to bring fresh and modern ideas on how we might appropriately adapt the building, ensuring that it remains relevant and is preserved for current and future generations. Through their direct involvement in this unique project, the apprentices will have the opportunity to develop new skills and interests, and to connect with the wider community. Our aim is for them to become passionate and vocal advocates, promoting the importance of caring for our historic buildings for today and tomorrow.

The Town Hall complex is one of Manchester's greatest cultural and civic assets, which makes a significant contribution not only to the heritage but also to the identity of the city. Manchester Town Hall and Albert Square are the most important of the buildings and public realm within the complex in terms of significance.

The Town Hall itself, which cost £1m to build and opened in 1877, is an internationally significant landmark. The building is grade one-listed, considered to be one of the masterpieces of Victorian architecture and cherished by the people of the city who view it as the civic heart of Manchester.

The Our Town Hall project includes both the safeguarding, partial restoration and upgrading of the Town Hall building and Albert Square. In January 2018, the building will officially close and the project will span across seven years with the Town Hall formally reopening in 2024. The delivery of quality social value outcomes is an essential element of this key city project, as recognised in the overarching project objectives.

Outcomes for the project will be varied and diverse, including promoting employment and economic sustainability; raising the living standards of local residents; promoting participation and public engagement; building capacity and sustainability of the third sector; promoting equality and fairness; and promoting environmental sustainability.

The entire project team has made a number of social value commitments, and this includes both the commitments that will be delivered within their own organisation and those to be delivered in partnership with the supply chain.

During the lifetime of the project, more than 30 apprentices will be involved in the two-year M Futures apprenticeship programme. The apprentices will spend a period of time with each of the different companies in the project team, which each have teams co-located in the Town Hall. This will provide them with experience of a full range of disciplines in the project team, including project management, architectural design and building conservation, landscape design, structural and civil engineering, mechanical and electrical engineering and cost consultancy. The apprentices, aged between 18-20 years, are studying the Level 4 Apprenticeship in Construction Management.

This exciting project provides a unique opportunity for these committed young people to have a direct involvement in bringing back Our Town Hall to its former splendid glory for the people of Manchester to enjoy now and for the next 140 years.





## The art of regeneration

Urban leaders have long been aware that creative communities breathe life into low value areas, only to be squeezed out when land owners cash in.

Erika Rushton  
Chair

Baltic Creative Community Interest Company

Cities with creative communities are more economically successful and more socially inclusive. As inner city residential development continues at pace, cities risk losing their identity and their lifeblood.

Baltic Creative CIC is a property company owned by, and for, the creative and digital sector in Liverpool. Baltic Creative cannot be squeezed out. In the last five years, partners in Baltic Triangle created more than 500 creative and digital businesses, employing 1,500 people and becoming the fastest growing tech cluster outside London in 2016.

In the aftermath of the crash property professionals at the first International Festival of Business thought EU subsidies, low yields and the lack of grade A space were to blame for stalled developments. Attendees at Place North West's recent Merseyside Update echoed the same concerns. Yet in 2012 Baltic's first 45,000 sq ft was fully occupied within six months and, having tripled its footprint to 120,000 sq ft by 2017, it was again fully occupied within six months. The waiting list could fill all that space again.

Baltic is not grade A; indeed it is affectionately known as 'The Tin Sheds'. Demand ranges from tiny, shared spaces to open plan warehouses. Tenants share, sub-let, move in and out as they please. The average company size is three and expansion and contraction is continuous. A recent visit to Oslo, where the sector is more advanced, suggests privatised offices will be rejected in favour of socialised space where entrepreneurs can bounce ideas and be involved in three or four ventures at any time.

Eighties Liverpool economists were convinced white guys in their forties were going to uproot their families and factories, and bring them to Merseyside, if only incentives were good enough. They rarely came.

At Baltic economic success is home grown – people having a go, taking a punt, involving families and friends, collaborating and producing. Tenants don't start with technology they start with a problem to solve, a point to prove, a mission to fulfil – and deliver a creative response.

Baltic companies are growing at 8% a year and 57% are trading internationally, compared to 30% this time last year. The DIT's 2017 inward investment results confirm C&D projects deliver five to 25 times the jobs of automotive or engineering sectors, and 26% growth, delivering 80,000 jobs, is projected in the North over the next three years.

Competitiveness is replaced by collaboration with 75% of tenants collaborating. Baltic Creative also collaborates with other area landlords, other clusters in the city region – Ten Streets, Fabric District and Artist-Led in Birkenhead – and with other city regions such as Salford where we are working with Islington Mill, Bow Arts and AEA to deliver the Mayor's Creative Industrial Zone plans. As a British Council Creative Hub Exemplar we hosted 100 global visitors last year. These are not competitors, they are local and global collaborators, designing a future that's shared and exciting.

We set out to support a sector, not to develop property or make money. As a CIC our profits, derived from tenants' rent, are all reinvested in the sector. In future it may not be what we build, but how we use our profits, that determines whether spaces are fully occupied, regardless of their A, B or S (for shed) grading.

90% of jobs are being transformed by technologies. Baltic Triangle may offer an indication of how we will all work in the future and if so it offers some hints on the spaces and places we should be designing.





## Force for good

The veterans' care village for Broughton House is an example of the personalised approach to living that we should all expect.

Gillian Harrison  
Senior architect  
Levitt Bernstein

Broughton House is a remarkable organisation, striving to give the best to the military veterans for whom it cares. The existing Broughton House care home is one of just two dedicated homes for veterans in the North of England. A far greater provision exists in the South of the country, despite the fact a quarter of all armed forces personnel are recruited from the North West of England. The home offers a place in which veterans of conflict can live out their final days in peace, surrounded by a beautiful landscape setting.

But it is no longer fit for purpose, and the Broughton House charity knows there are more ex-service personnel who could benefit from their approach to care. As such, next year the old building will make way for a new care home for 64 residents and independent living apartments for another 30. Integral to the new village will be a support hub providing a focal point for veterans and serving soldiers, allowing them to access support for various issues such as mental health problems, addiction and other challenges facing many ex-service personnel.

Levitt Bernstein's design concept for this flagship building is the contemporary re-imagining of a military fort, where a community would have lived within protected walls. The accommodation is wrapped around a generous landscaped courtyard, with space for activities from a bandstand to a bowling green, forging strong communal links.

External materials and treatments reference the solidity of stone battlements, providing a feeling of protection for those inside. A focal entrance (although not a drawbridge) will welcome visitors into the heart of the building where support services and historic displays will be located.

The care home accommodation is arranged in households suited to the level of support needed by residents, with one dedicated to those living with dementia. Each includes a suite of bedrooms that connect to an open plan living and dining space, which includes a communal kitchen so that residents can partake in normal daily domestic life, such as the preparation of meals. Communal spaces include balconies and winter gardens so there is a view out over the central courtyard towards the rest of the community, and a view out through the 'wall' and trees to the wider world.

It's a sobering thought to imagine the building that you might choose as your final place to live. The care and dedication shown by the Broughton House charity is inspirational, and with this new resource, the work that began over 100 years ago caring for wounded service personnel (and carrying out operations in the basement), can continue into a new phase.

A fundraising campaign has been raised to help Broughton House realise its development proposals.

To donate, please visit:  
[www.justgiving.com/fundraising/themillionpoundsalute](http://www.justgiving.com/fundraising/themillionpoundsalute)



## Value in disruption

The burning question for the property industry at this time of year is how we add greater value to the industry as we move into 2018.

Michelle Rothwell  
Founder  
Watch This Space

For me, the answer is simple: create unique, innovative spaces that break away from the norm and help to provide the optimum conditions for businesses and individuals to flourish and thrive.

We need to focus on what the next generation are looking for and it's not stale, traditional office buildings – it is inspiring places. We're talking contemporary, cutting-edge spaces which create like-minded "business clusters" and allow companies to focus on growth.

Ones which offer greater alternative incentives and focus on health and well-being are increasingly sought. Our scheme soon to be launched in Spinningfields for example could be mistaken for a garden center when you walk in.

At 31 Princess Street where we launched the UK's first property co-work space, incentives include stand up working, yoga classes, cycle storage and even beer.

There are so many wonderful, yet neglected buildings in the North West and by regenerating them and giving them a new purpose, we can create a hub for the next generation of businesses to grow.

We have had success in creating business clusters, with the results showing that our clients' productivity has increased by working with businesses with a similar culture as the high concentration of knowledge improves the level of innovation and gives access to a wider marketplace.

We recently launched an exciting scheme in the Lake District, Billy's Space. The project saw the former Duke William pub, a grade two-listed building, which had been left derelict for four years, converted into new office and leisure spaces for local businesses.

The 6,000 sq ft development includes cycle storage, electric car charging, showers and each space comes complete with a separate front door, kitchen and toilets, with some featuring additional quirks such as fire places.

There is nothing quite like this in the Lakes with the most unique thing about this project being that the spaces can be bought or rented.

This challenges and disrupts the market as it allows small businesses to be their own landlords which is a rarity for the commercial market in the UK.

We are also happy to let people "try before they buy" and can agree a purchase price which we will hold for two years. This may go against the traditional property status quo but shows that there is a real appetite for innovation and greater flexibility in the sector which is very encouraging.

In 2018, I hope to see new trends and fresh ideas continue to shine through as they add real value to the sector.



## No room at the inn

UK hotels have been enjoying record trading, underpinned by the recent boom in overseas leisure travel. But can these good times survive into 2018 and beyond?

Caroline Hanratty  
Partner  
Mills & Reeve

According to Deloitte's European Hotel Investment Survey released in November, levels of investment in Manchester's hotel sector are set to continue. The senior industry leaders who responded to the survey were optimistic about the regional hotel market in 2018, predicting growth of 1-3% in the larger cities such as Manchester. 19,000 rooms are due to be delivered across the UK in 2018 and both Manchester and Liverpool have healthy pipelines.

While operators are currently enjoying the bounce of the weak pound driving foreign tourists to the UK which has contributed to high levels of hotel trading in 2017, this year's terror attacks in London and Manchester appear to have had limited impact on visitor numbers.

In terms of investment, investors are now much more comfortable with hotels as an asset class and they are no longer seen as an 'alternative' asset.

Regional occupancies continue to creep up, helped by the expansion in budget hotels which traditionally operate at high occupancy levels.

The wearing off of the effect of the weak pound on numbers of visitors to the UK, the large increase in the number of hotel rooms available and the slowdown in overall economic growth combined with extraordinary levels of political uncertainty are expected by many to cause growth to be significantly slower in 2018 than the last few years.

In addition, the weak pound, whilst bringing in tourists, has been creating a more difficult environment for hotel operators who face rising costs of imported goods.

Brexit has already prompted some EU workers to leave the UK and some hotels are having trouble filling jobs and facing higher costs to do so.

The national minimum wage, national living wage, rising costs of supplies, high business rates and increased utility bills have all contributed to the increased costs facing operators.

Deal volumes in 2018 are expected by some to be down on 2017 levels as China limits its foreign investment and the focus is likely to be on single transactions rather than portfolio purchases.

So what will 2018 look like?

The increasingly challenging market for hotel operators means they will have to be more creative in how they operate their businesses including:

- Adapting their product to compete with the Airbnb product
- Improving cost management
- Finding ways to use their existing estate to drive additional revenue
- Looking for ways to reduce the commission they pay without alienating the online travel agents

In terms of deal structure, there will be a need for local authorities to do more to support a transaction than simply supporting planning applications by looking at the use of grants, alternative ownership structures and the use of councils' covenant strength as well the availability of land.

These factors can make a scheme viable while providing new jobs, new investment and business rates receipts for the local authority plus the potential for a wider regeneration of a site.





## Bidding wars

Over the past 12 months, bid questions have become clearer, word counts have been cut and submitting lengthy appendices is now frowned upon.

Donna Neely  
Director and founder  
The Northern Edge

Quality over quantity has become more important than ever and we see this continuing into 2018. With this will come more online portal submissions as procurement teams simplify and streamline the tender process.

Whilst based on positive intentions, the restrictions these portals place on tenders could become a problem. Bidders are expected to provide fairly complex information within restricted word counts and formatting guidelines.

This forces them to be very clear and concise in their response, which is a great result, but bidders should also be allowed some creative license.

Unless there is a balance between submission guidelines and the opportunity to provide unique, quality content, bidders may look for new ways to stand out.

With video now one of the most powerful and commonly used sales tools, it would make sense for it to creep into the world of procurement. Current submission restrictions mean it can be challenging to communicate and differentiate your offer and a video link, as part of your response, could be the answer.

A good quality video can be very persuasive and can tell more in a couple of seconds than a word submission can do in two pages. Whilst I wouldn't suggest using general corporate videos, bespoke content can be really engaging, such as explainers which outline how you understand the client and what your winning solution is, video testimonials, project case studies or demonstrations of an innovative product or system you intend to use.

Data can provide procurement teams with evidence of best value so showing how you will provide or use data when delivering the contract will be welcome in 2018.

A strong bid narrative will always be important but quantitative data and analysis will start to set bidders apart. Data can relate to your commitments around social value, key performance indicators, spend and cost analysis and supply chain performance.

The key will be to not only make commitments, but to show how the data will be monitored, gathered, analysed, evaluated and reported to provide the client with evidence of your and their impact. Real-time, transparent data which can be accessed through shared, cloud platforms will also be attractive to clients.

Evidence of technical skills, qualifications and experience is fairly typical in bids, but as team profiling becomes more common we may start to see personality profiles or EQ (emotional intelligence) scores form part of the tendering process. These tools are used to determine behaviours, communication preferences and working styles; all important factors to consider when trying to create a high performing team. Including these in a tender will help the client to identify the most appropriate people to supplement and complement their in-house team, particularly where they are procuring a partnership arrangement or where a co-located delivery team will be established. Profiles also provide clear, quantitative data which lends itself to public sector procurement scoring frameworks.

With construction the largest sector in public procurement over the last two years and £309m of construction frameworks and contracts due to expire in 2018, there are many opportunities to bid for work. However standing out when the tendering process is moving towards a more prescriptive framework will need creativity and new ways of presenting information.





## The co-working curve

Relentless reinvention is a characteristic of dynamic international cities, and looking beyond the UK it's often instructive to see how the market is changing.

Jessica Bowles  
Director of strategy  
Bruntwood

When you glance across the Atlantic, one of the most compelling trends is the continuing evolution of co-working, which is reshaping where and how people work.

For example, female only co-working spaces are proving successful in the USA and Canada, and provide environments where women from different backgrounds and professions can find mutual support, relationship-building and wellness.

The Wing in New York City, Shecosystem in Toronto, and Paper Dolls in Los Angeles allow women the opportunity to feel secure and supported by like-minded females, as well as gaining confidence and building productive connections. The thinking is that when women create and design spaces for themselves, they can better overcome issues that have hampered their progress in traditional office environments.

Repurposing city centre restaurants when they are closed during the day is another bold and unorthodox concept that is seeing success Stateside. Partnering deals with top eateries in New York and San Francisco has enabled Spacious to open up beautifully designed restaurant space for its members to work, meet and do business.

An equally outside-the-box concept is the development of co-living space alongside co-working environments. American companies have created all-inclusive experiences that mean members can join co-living communities and access amenities such as free internet, maid service and companionship.

The Global Workspace Association, a platform for shared space operators and service providers around the world, has noted that the two current buzzwords in the sector are 'consumerisation' and 'user-centred'.

The user experience has become an increasingly powerful market dynamic. We all spend so much of our lives at work, we want attractive, productive environments. Whereas co-working space might have once been promoted solely on the benefits of its flexibility and the potential to network, the market has matured and

users now expect superior design and great hospitality as part and parcel of the package.

GWA's research also makes it clear the profile of co-working users has broadened out beyond freelancers and independent consultants. Small businesses and mobile corporates are taking more and more space. At the same time, providers are offering private offices, making a myth of the idea that co-working means open workspace.

All of this suggests that the old way of working – 'presenteeism' and rigid working hours – is increasingly outmoded by more free-thinking and productive working arrangements.

We know that being stuck at our desks nine-to-five every day harms, not helps productivity. Forward-thinking workplaces accommodate a variety of workstyles. Neo in Manchester, for example, has areas to accommodate many different ways of working, such as soft spaces, quiet spaces, social spaces and concentration spaces.

We understand that workers, and especially millennials, are attracted by workplaces that are life-enhancing. So there's co-working spaces that offer yoga or provide meditation classes – and now most co-working spaces, including our own, have a community manager. A programme of events for the people working within their building in order to facilitate interaction and networking is becoming de rigueur.

Co-working spaces are very much a part of the equation within tech clusters, which are also shaping our cities. We have long regarded a flourishing tech industry as one of the key indicators of a healthy local economy. Direct employment in the tech sector in Manchester is now at 52,000, making it second only to London. If you add in people working in the wider digital industry, that figure is closer to 85,000.

We want to see tech clusters and the good supply of co-working space maintained and to become even more established as a 'must-have' for cities relying on entrepreneurial and enterprising individuals to drive their economies forward.



## A public-private push

This year the industry needs to make a real effort to do more than just talk about public-private sector collaboration to help deliver those ambitious housing targets and regeneration plans.

**Tahreen Shad**  
Regional partnerships director  
Lovell Partnerships

The industry needs a shake-up. We need innovation in modular housing at scale and development of fringe areas, to drive housing supply and help improve employment in our communities.

The challenge in this is not least the brave step to develop at scale for modular.

For industries such as the nuclear sector in Cumbria and North Wales, there will be a requirement for quick and ready sheds for workers' accommodation, especially in areas like Barrow which have huge growth predictions and have been historically neglected by house builders and industry.

For modular to succeed elsewhere, it needs some bold public sector intervention to build at scale. Current estimates are that modular building is between 20 – 30% more expensive than traditional construction. Until this method of construction is developed at scale, the benefits will be limited.

The industry needs better incentives to build in challenging areas, for example in typically neglected areas in East Lancashire and Greater Manchester, and beyond traditional housebuilder territory greenfield sites. Andy Burnham's fund for regenerating towns will be interesting; those neglected towns need to be concentrated on, away from the glitz of Manchester and the big cities.

Retail and town centre-led development that includes a mix of housing at affordable levels whether PRS, affordable homes for both rent and sale, or alternative tenures, is crucial to enabling local people to live in quality housing.

Developers need to collaborate with the public sector to release under-used public land for development – offering a fair return, quality and value to the public sector.

There are significant public sector opportunities that need private sector collaboration, including new transport hubs in the North West.

The private rented sector market has tended to focus on towers in our big cities, but a real alternative tenure is low-rise PRS housing for families and young people. Brownfield development and taking a proactive role in the remediation and packaging of sites as opposed to transactional arrangements will be key if we are to start any meaningful partnerships.

A number of local authorities are in the process of setting up local housing companies. This is great news as it could turn into the large-scale municipal council building programmes of the past, which in turn could evolve into the establishment of a radical technical skills delivery programme desperately required by the industry.

An effort at scale would release land for hundreds of thousands of new homes.



## Demystifying placemaking

With developers from across the UK and the world working on Manchester's new schemes, it's now more important than ever for a holistic placemaking approach.

**Razi Riahi**  
Strategy director for placemaking  
DS Emotion

The term 'placemaking' has become popular in urban development as a response to a gap in the current approach to making vibrant places. Today it is regarded as a vital approach and one that can have major benefits to the entire community, but many – working in and outside the property industry – are unsure exactly what 'placemaking' entails.

Good placemaking put simply, unites stakeholders and place users. Its outcome should create strategies that facilitate ongoing meaningful conversations between the two and ultimately create vibrant, meaningful and resilient places.

Secondly, good placemaking should speed up a place's integration with its people. The natural growth of a place is usually between 10–15 years but placemaking strategies should aid to reduce this time significantly. Additionally, short-term strategies, including the use of more 'trial and error' concepts will ensure that any cultural, retail and leisure strategies are tested and relevant.

The idea of placemaking is not new but in the UK it's gaining great momentum with more and more developers taking inspiration from our European cousins like Las Ramblas in Barcelona and Gamla Stan in Stockholm. The ultimate measure of a successful place is thriving communities that take ownership and participate in the ongoing delivery of the place's vision.

Placemaking is about understanding and celebrating the uniqueness of each place, primarily by reconnecting people to their place.

Places without people can't survive and Argent's King's Cross is the placemaking pin-up of our time for strategically bringing together all of these elements.

Every place has its own unique set of challenges and opportunities. The key is forming strategies that work with these unique parameters to build on its strengths.

Any end goal will have a short-term and long-term strategy that will ultimately position the place as an integral part of its city.

Developers in Manchester should build with placemaking in mind. To create new places with real community, its creators should differentiate themselves from their competitors and play to their site's unique qualities. What is right for Piccadilly won't necessarily be right in Salford.

We have a great opportunity to create friendly and welcoming communities that are connected and convenient, ensuring that Manchester becomes a globally recognised pin-up of its own.

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