



GREATER MANCHESTER
INTERNATIONAL STRATEGY
2022-2025

**GREATER
MANCHESTER**
DOING THINGS DIFFERENTLY

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FOREWORD

The world continues to change.

Climate change requires us to look after our planet better and rethink how we do things. The pandemic has had a severe impact on key sectors whilst shaking up supply chains and accelerating the adoption of digital technology. Brexit has changed our relationship with one of our largest markets and renewed focus on engagement with others. And instability in eastern Europe has served as a reminder of the importance of international relations.

The International Strategy is how Greater Manchester will connect with, and lead in, this changing world.

It sets out how our global reputation, diplomatic links, and physical and digital connectivity will be used to drive innovation and attract international students, trade, inward investment, international visitors and major events.

It demonstrates how leading on the world stage can be part of work at home to become a greener, fairer and more prosperous region.

And it details why this matters for people in Greater Manchester, the North of England, and Global Britain, alongside the world.

Above all it demonstrates that nowhere is better placed than Greater Manchester, at the heart of a resurgent North, to respond to shared global challenges and contribute to Global Britain.

We are already recognised around the world as a global city-region. From the birthplace of the industrial revolution to the beginning of social movements; celebrated football teams to scientific breakthroughs.

Our region already successfully engages the world. Greater Manchester is the key diplomatic hub in the North. Partnerships with key city regions in Europe, China, South Asia, India, Japan, and the USA, are strengthened by a combined authority and an elected mayoral office.

Our region is already connected with the world. Manchester Airport is the North's global gateway connecting a £350 billion economy to cities from New York to Dubai, supporting trade and investment and increasing international students and visitors.

Because working as a collective to compete on the world stage, is fundamental to our successful growth, and to who we are.



Connecting and competing for growth, both within Greater Manchester and beyond, is synonymous with our region and has been since the industrial revolution. It has led to the creation of unique partnerships, brought cultural, social and economic benefits including diversity which in turn has developed our intrinsic will to 'do things differently.'

It has made us who we are. Outward-looking. Open. Pioneering. Innovative. International.

So of course, our international ambitions are in lockstep with local ambitions as set out in our Economic Vision, Industrial Strategy, and the Greater Manchester Strategy.

And in lockstep with Levelling Up and Global Britain: rebalancing opportunity across the UK and reinvesting in relationships on the world stage.

We are determined to grow the quarter of a million people employed in our region through foreign-owned companies and in the visitor economy.

We are determined to increase exports that boost productivity.

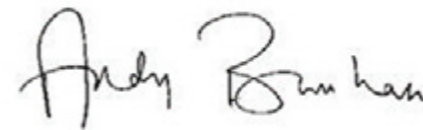
We are determined to increase the number and diversity of international students, who already contribute so much to our region.

And we are determined to reinforce our reputation as a world-leading innovator in digital, health and advanced manufacturing: the pioneer of the industrial revolution and a UK Innovation Accelerator City will lead in the green and digital revolutions.

Because above all else, this International Strategy is in lockstep with your ambition for our city region.

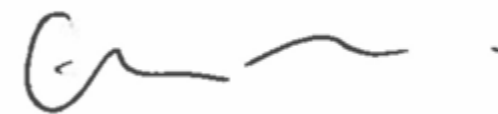
This is a blueprint to build the partnerships that shape our success. And it is an invitation for others to be a part of them.

To join us as we connect with, and lead in, this changing world.



Andy Burnham

Mayor of Greater Manchester



Cllr Elise Wilson

Leader of Stockport Council
and Portfolio Lead for Economy and International



Lou Cordwell OBE

Chair of the Greater Manchester
Local Enterprise Partnership





INTRODUCTION

In recent times Greater Manchester has seen unprecedented growth, development and opportunity for our people and places: a place of pioneers, innovation, beautiful scenery and home to many thriving and diverse communities. As we move forward from the pandemic, Greater Manchester is determined to become greener, fairer, more prosperous, driven by opportunities in all localities.

Despite an increasingly complex national and international landscape, internationalisation and our growing reputation as a global city-region have been key catalysts in the city region's success to date and this refreshed International Strategy is an essential ingredient in Greater Manchester's plans for recovery and renewal going forward.

As with many countries around the world, our recovery from the pandemic will be tough. Our people, businesses and places have been disproportionately impacted, and the effects and impacts of that will be persistent and far reaching. However, we will capitalise on the international opportunities available to us, drawing on our considerable assets across the city-region, and actively seek to develop new opportunities for the benefit of all our people and places. Our new relationship with the EU and changes in national foreign and trade policy also present us with new opportunities and challenges.

The Manchester brand is recognised globally thanks to our world-famous football clubs, our iconic music scene and international institutions such as the Manchester International Festival. Our ability to operate at a Greater Manchester scale helps facilitate and give additional weight to our engagement with other global cities and regions.

This strategy builds on the priority areas from our International Strategy published in 2017 and our previous One Year International Strategy published in 2020 setting out our ambition and a framework for action through two areas of grouped priorities:

- **Core Priorities** - Trade, Investment, Research and Innovation, the Visitor Economy (Business and Leisure) and International Students.
- **Enablers** - Connectivity (Digital and Physical), City-Region Diplomacy and Greater Manchester Global Perception and Reputation.



The Strategy sets ambitious targets for each of the priorities, together with strategic objectives outlining how we will achieve them. These strategic objectives will be supported by an International Strategy Delivery plan as well as our individual delivery agencies' respective strategies and business plans.

Because we know we perform better when we work together, this International Strategy provides a blueprint to corral and energise our partnerships, galvanise relationships, working across agencies and sectors, and provides a platform for the further development and establishment of new relationships, opportunities and ways of working. We will use it to further our relationship with central Government, investors and other city-regions around the world, providing a platform for our future and how we would like to work in partnership to achieve our shared vision.

Our refreshed International Strategy supports the delivery of the overarching Greater Manchester Strategy, the Local Industrial Strategy and is in line with the Economic Vision developed by our Local Enterprise Partnership.

The Greater Manchester Strategy sets out the overarching ambition for the city region. It provides a clear direction of travel for our city-region over the next decade, focused on those areas where all parts of the conurbation need to work together to achieve our shared vision of **Good Lives for All: that Greater Manchester is a great place to grow up, get on and grow old; a great place to invest, do business, visit and study.**

The Greater Manchester Strategy puts responding to the **interconnected challenges of climate change and inequality** – the most pressing issues for the city region – at its heart. These interconnected and overarching agendas frame our city-region priorities; lenses through which all of our activity will be developed, tested and progressed. But whilst the challenges our city-region faces are real and significant, Greater Manchester also has many internationally significant opportunities and so tackling these challenges will be supported by: a) the ambition to become more **prosperous**, capitalising on our significant world leading strengths to drive economic development with equality of access for all; and b) driving opportunities in all of our **places** across Greater Manchester.





AMBITION

Our international vision for Greater Manchester is to be a leading city-region in the UK and globally and an international influencer in green and digital. This will support us to become a place where everyone can live a good life, growing up, getting on and growing old in a greener, fairer and more prosperous city-region.

Through the lens of climate and equalities, supporting prosperity, driven by our places, our international ambitions in delivering our vision of good lives for all are to:

- Raise the profile of Greater Manchester as a welcoming, vibrant and diverse city-region with a strong cultural, sport and place offer, continuing the work to make our city-region a great place to visit, invest and study.
- Work with partners nationally and internationally to leverage the benefits of internationalisation and deliver on our economic vision by increasing trade, attracting foreign direct investment, and fostering cross-border international partnerships to support the creation of better jobs and good employment to build a more prosperous, fairer and globally competitive city-region.
- Position Greater Manchester at the heart of the UK's global competitiveness and forefront of innovation with world-leading strengths in Digital/Cyber, Health Innovation, Advanced Materials and Manufacturing, and Low Carbon Technology, driving investment in these sectors, improving our ability to turn research

in to solutions that are tested in Greater Manchester and then shared with the world and enable us to become a greener and fairer place.

- Work with partners across the world to achieve our target of carbon neutrality by 2038, helping to accelerate the UK's and global transition to net zero by sharing our expertise, learning from others, and working with the world's most innovative companies.

We will measure our performance by monitoring:

- The volume and value of investment that reflects the Greater Manchester Economic Vision, for example creating high-value jobs but also securing investment in low carbon, R&D and HQs with impact across our 10 districts.
- The international reputation of our universities, recognised for their globally leading research strengths.
- The export propensity of our business base across the city-region, growing the value of goods and services exports, increasing our average export value and diversifying our trade markets.
- Our success as a key international gateway to the UK, measured by our ability to secure further direct connectivity.
- The value and volume of international visitors, conferences, and events to the city-region, ensuring our tourism industry grows sustainably and the sector is supported.
- The number of international students in Greater Manchester, ensuring we continue to expand the diversity of our international student base.
- Our performance on the Resonance World Best Cities Index, ensuring we obtain a Top 100 spot by 2025, demonstrating our global perception as a leading city-region.





AN EVOLVING CONTEXT

Since the publication of our three-year International Strategy in 2017 and our one-year International Strategy in 2020, the local, national and international landscape has changed dramatically.

The pandemic and the subsequent economic shock have accelerated and intensified the pace of change. As competition is increasing as new global cities emerge, Greater Manchester must continue to be ambitious to remain relevant on an international stage.

In a national and regional context, our departure from the EU, the UK's new foreign policy ambitions and the growing recognition of the important role of Mayors internationally are all shifting our approach to how we engage internationally. This new context which brings with it new challenges and opportunities continues to evolve and change the foundations and principles of Greater Manchester's international engagement.

Decarbonisation and Sustainability

Decarbonisation, sustainability, and net zero are a top priority for governments and organisations. Greater Manchester's strengths in these areas and the investment in the infrastructure, systems and skills present significant international opportunities which we will seize going forward.

The Pandemic

In March 2020 as the challenges of the pandemic emerged, much of Greater Manchester's international activity was paused. An impact assessment was completed showing the adverse effects the pandemic and subsequent travel restrictions were having on our international ambitions. These included a fall in exports, investments, visitor numbers and passengers to our airport.

Uncertainty around international travel is anticipated to continue as new variants emerge and countries respond to their local situation with restrictions and measures to stop the spread of the virus. Visit Britain has forecasted that cross-border travel will not recover to pre-covid levels until 2023 at the earliest, and more likely 2024. National Tourism Recovery Plan also echoes this timeline.

As businesses adapt to these new uncertainties, certain trends, challenges and opportunities are emerging which will redefine how many operate.

- **Realignment of Global Trade** – There is a notable shift in businesses onshoring and looking to diversify supply chains to improve resilience. This has been further influenced due to trade wars, economic nationalisation and pressures to grow employment locally. These shifts create significant opportunities for Greater Manchester,



particularly for our companies looking to export to new markets, and for attracting businesses to the region.

- **Acceleration in the adoption of digital technologies** – The pandemic has placed a greater reliance on remote and hybrid working. Whilst this has its benefits for engaging internationally, creating greater flexibility in what activity is done where, it has resulted in reduced levels of international travel impacting much of our travel sector. From an FDI perspective, as companies develop return to work strategies including new models of smarter and more cost-efficient working, it may impact the type of physical office space required by businesses.
- **Increased international competition** – Other places around the world are investing heavily in international promotion and marketing to help rebuild following the pandemic. We must continue to invest in our place marketing and international support offer if we are to remain competitive.

Brexit

The UK's departure from the EU has created new challenges and opportunities. We are aware that changes in regulation have had a negative impact on our trade flows. We will continue to monitor the situation and support our businesses to address these and highlight any new opportunities emerging.

From an FDI perspective, the ongoing uncertainty between the referendum in 2016 and General Election in December 2019, had a considerable impact on FDI with the inward investment cycle doubling as investors took longer to make decisions on new projects and capital investment projects were put on hold. We will continue to support our foreign owned account management businesses, ensuring they maintain a presence in the region and are able to potentially grow their presence in the region whilst remaining competitive. Where there are challenges, there are opportunities and Greater Manchester continues to monitor the re-shoring and UK HQ opportunities Brexit presents.

The change in immigration rules have caused disruption to worker mobility between the EU and Greater Manchester creating labour market challenges. This has had an impact on sectors including hospitality, arts & entertainment and our logistics sector, impacting our international ambitions. We will continue to support these affected sectors and continue to report on the difficulties faced. High-value sectors such as digital, health innovation and Financial, Professional and Business Services are also affected by international mobility issues as global talent adjusts to the new UK immigration system. Whilst this has created certain challenges for EU mobility it has also opened up opportunities to attract talent outside of Europe.



Following the UK's departure from the EU, we no longer have access to the European Investment Bank loans or EU programmes such as Interreg, URBACT, Erasmus or the Urban Innovation Action. Many of our local authorities, education institutions and businesses have benefited from these schemes to support both local and cross-border projects. The UK plans to introduce national schemes to replace elements of these programs, however a gap is expected at least for a period of time. Greater Manchester will continue to leverage our international partnership and networks to ensure that our local authorities and stakeholders still gain from collaboration internationally.

UK Foreign Policy – Free Trade Agreements and UK Export Strategy

Since leaving the European Union, the UK has been negotiating Free Trade Agreements (FTAs) with countries around the world aiming to reduce or eliminate tariffs and quotas for goods exported overseas. So far, the UK has signed agreements with over 70 countries.

The UK has formally applied to join the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) as well as looking to develop a FTA with India, presenting significant opportunities for the city-region.

In November 2021, the UK government published a new UK Export Strategy and a new campaign – “made in the UK, sold to the world” - setting out how the government will support businesses of all sizes to make the most of the opportunities presented by these markets around the world.

We have aligned our global markets and international ambitions to those of the UK Government. In June 2021, Greater Manchester was the first city-region to jointly host an online event in partnership with DIT and the Japanese Embassy in London raising awareness of what the new UK-Japan FTA means for Greater Manchester and its growing links with Japan. We will continue working jointly with the UK Foreign Commonwealth and Development Office, the Department for International Trade and other key government departments as well as national agencies to pursue our international shared objectives and work in partnerships where there is mutual benefit.

UK Foreign Policy – Global Britain

In March 2021, the UK Government published the Integrated Review of Security, Defence, Development and Foreign Policy - this defines Global Britain, the government's vision for the UK's role in the world over the next decade, and outlines how the UK will take action to 2025. The review focuses on the UK as a force for good with attention shifting away from the EU to markets such as the US, the Commonwealth and other high-growth emerging markets.

Greater Manchester will continue to support its businesses to pursue opportunities in high growth emerging markets and we will continue to work closely with our diaspora communities to increase our international engagement in countries including Pakistan and Bangladesh, giving back to the communities that helped make Greater Manchester the place it is today.



Levelling Up and the role of Mayoral Combined Authorities

Over the years Greater Manchester has received many requests from international places wanting to share best practice, work closely and do business with partners locally. These requests have continued to grow exponentially following the appointment of the first elected metro Mayor in 2017, highlighting the important role that Mayoral Combined Authorities can play in helping to deliver both local and national international ambitions.

City-regions like Greater Manchester can play an active role in supporting national government priorities such as trade, investment, research and innovation and people-to-people connection. We know what our strengths are, how the city-region operates and know that by working in partnership with government we can help deliver Global Britain.

Going forward, we will strategically leverage the international connections we have built over the years to deliver practical benefits. We will work with other partners across the Northern Powerhouse region, including other Mayoral Combined Authorities to identify shared international priorities and global markets where we can share resources and work together, helping to close the gap between London and the UK's other city-regions.





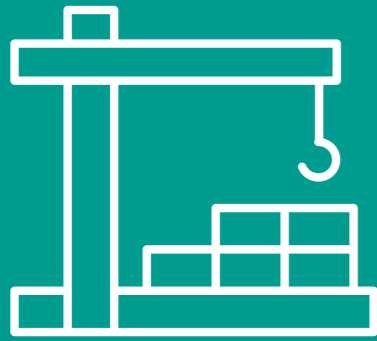
VALUE OF INTERNATIONALISATION TO GREATER MANCHESTER

We recognise that internationalisation has a transformational impact on our productivity and prosperity, unlocking growth opportunities for our businesses and institutions, helping to create and sustain good quality jobs for our residents.

A strong international strategy can play a role in supporting elements of economic recovery, ensuring Greater Manchester remains relevant on an increasingly competitive international stage and drives international priorities which bring substantial benefits to our residents.

Although the true value of internationalisation is difficult to quantify due to its many intangible benefits, there is overwhelming evidence of the catalytic impacts international trade, investment research and innovation, international visitors and students have for Greater Manchester, all playing a crucial role in raising our profile overseas as well as supporting our foundational economy and job creation locally. Our international partnerships also provide valuable insights which help us shape policies locally.





EXPORTS

In 2019 Greater Manchester total exports for Goods and Services totalled £14.9bn, equating to 18% of our total GDP.

Businesses that trade internationally are more resilient, competitive and employ more people than those that do not (1). Over 10,000 companies in Greater Manchester Export, helping to sustain over 100,000 jobs.



VISITOR ECONOMY

Manchester is the 3rd most visited city for international tourists to the UK.

International visitors spend up to ten times more than domestic tourists and in 2019 tourism alone contributed £9bn to Greater Manchester's economy, sustaining over 101,000 jobs and supporting the city-regions foundational economy.



INVESTMENT

Foreign owned companies are worth £37bn to Greater Manchester and employ around 172,000 people.

Foreign-owned firms in Greater Manchester are more productive, invest more readily in technology and skills and are more likely to export (3). Over the last three years FDI has contributed £524m (2) to the local economy, creating over 74,000 jobs.



INTERNATIONAL STUDENTS

Greater Manchester has one of the largest international student populations in the UK, making up 20% of our entire student population. It is estimated that International Students are worth over £1bn to Greater Manchester's Economy.



CONFERENCE AND EVENTS

In 2019 Business conferences contributed £826m to Greater Manchester's Economy.

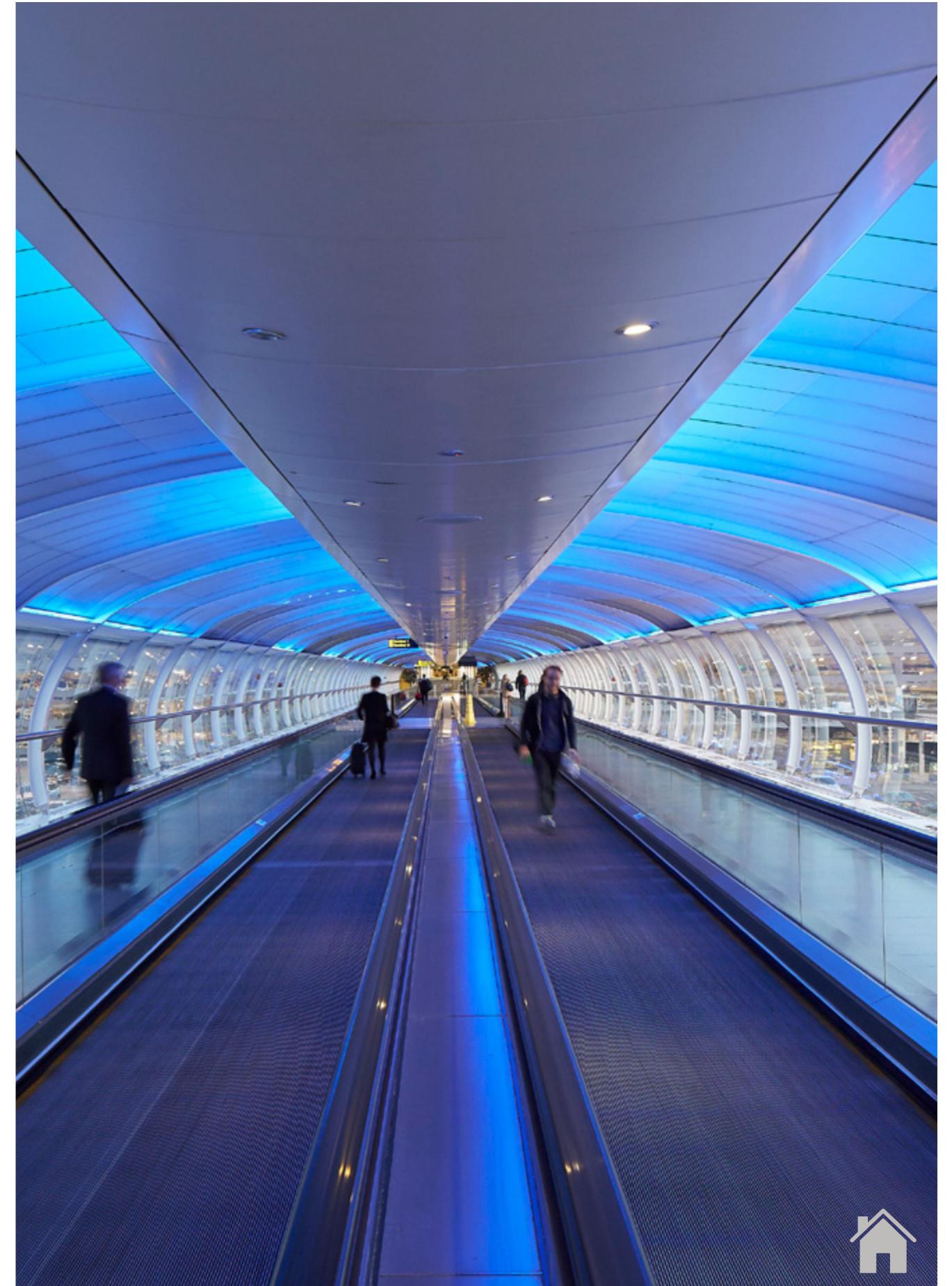
The attraction of large international conferences and events helps to raise the profile of Greater Manchester's sector strengths as well as promoting our sporting and cultural excellence.



Whilst it is important to acknowledge the positive economic and social benefits of internationalisation, we cannot ignore the potential negative implications our International Strategy may have on the environment and our ability to achieve carbon neutrality by 2038.

Air travel, tourism as well as sea and land freight are all major contributors to global emissions despite being critical elements of our internationalisation ambitions. However increased interaction with the rest of the world will enhance our ability and capacity to manage the interconnected challenges of climate change and inequality. Cross border innovation and business partnership will improve access to new knowledge and technology, helping us to address our local environmental challenges which are too difficult to solve alone. By working with other places, we can share and learn new ways of working, continually striving for improvement and development.

Many of Greater Manchester's businesses and research institutions are recognised as world leading in their technology and capabilities for addressing the climate challenge. Moving forward we will work with our partners locally to carefully consider the difficult trade-offs between prosperity and climate change, ensuring we develop an informed and long-term approach to minimising the environmental impact of our International Strategy.





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A STRONG FOUNDATION

A Diverse Population

Greater Manchester has a long and proud history of welcoming and supporting people from different communities to make Greater Manchester their home. Over 30% of Greater Manchester's population comes from diverse communities and today more than 200 languages are spoken across the conurbation making us one of the most linguistically cosmopolitan city-regions in Western Europe.⁴

We work with these communities and groups to showcase their diversity in many different ways, including a wide range of events and annual festivals. Some of these annual events include Chinese New Year, the Manchester Irish Festival and St Patrick's Parade, the Diwali celebrations (the largest in the North of England), the International Women's Day Programme, the Manchester Refugee Cultural Festival, the Mega Mela, the Caribbean Carnival and many others.

A Strong Sector Base

Greater Manchester's economy is one of the most economically diverse in the UK with more than 124,000 businesses. Our biggest employers operate in Financial and Professional Services, Wholesale and Retail and Health and Social Care. Other significant sectors include Construction, Digital and Creative, Hospitality, Tourism, Sport, Manufacturing, Low Carbon Goods and Services and Logistics.⁵

Business start-up rates in Greater Manchester have improved sharply since 2008 and ours is now one of the best performing city-regions outside of London for business births. Our excellent academic institutions, with sector strengths in health innovation, advanced materials and digital technologies, underpin our innovative ecosystem of companies. In recent years, large corporates, and innovative high growth small and medium enterprises (SMEs) have chosen to invest in Greater Manchester due to its increasingly recognised reputation as an innovative, diverse, well-connected and outward looking city-region.

The Greater Manchester Local Industrial Strategy published in 2019, in partnership with national government, sets out our vision for the future, building on our recognised strengths and recognising our most valuable asset: our people. In the long term, we aspire to become a global leader on health innovation, position ourselves as a leading place for the development and adoption of advanced materials in manufacturing and build on our reputation as a leading European digital city. Greater Manchester also aspires to build on its strengths in low carbon technology and achieve carbon neutral living by 2038.



The recent pandemic provided significant challenges; however, we used the opportunity to reappraise our economic priorities, putting a clear focus on people and planet first. Driven by the [Greater Manchester Strategy Vision](#) and [Greater Manchester's Economic Vision](#) we are now set to lead the local and UK economic recovery with a shared vision for our future that has innovation, digital, green growth and addressing inequalities at its core.

Greater Manchester has assets, research excellence, talent, and innovation potential within the frontier sectors of:

- **Clean Growth:** UK's first city-region Clean Growth Mission, providing significant opportunity for the development of new green industries
- **Health Innovation:** largest life sciences cluster outside South East England with high potential opportunities in diagnostics and healthy ageing
- **Advanced Materials and Manufacturing:** home of graphene and complimentary advanced manufacturing base
- **Digital, Creative and Media:** significant clusters in cyber security, ecommerce, fintech, broadcasting, culture, content creation and media

A focus on our frontier sectors has the potential to address some of society's biggest challenges including achieving net zero carbon emissions and addressing the challenges of an ageing population. We are working in new ways to understand the skills and talent needs of business in these sectors, gathering intelligence to help us shape a skills offer that will help businesses thrive, adapt and grow. We want to also utilise these sector strengths to create a prosperous Greater Manchester, powering our economy and positioning the city-region at the heart of the UK's global competitiveness.

We are committed to driving the productivity of these sectors through international engagement, promoting our strengths, attracting investment, driving international research collaboration, and increasing our export propensity across our priority sectors.

Unique Assets

As well as our sectoral strengths, Greater Manchester benefits from key assets that contribute to our unique position within the regional, national and wider global economy.

As a conurbation, our place is unique – an interconnected city-region with ten diverse boroughs home to distinct neighbourhoods, towns and cities and the regional centre, each with its own characteristics and its own community and cultures. We have some of the most desirable places to live, work and visit in the UK.

Our growth locations each provide a platform to lever the unique opportunities and assets within those locations to respond to the variety of needs and challenges present in different parts of the conurbation.

- **Central Growth Cluster** including the Regional Centre, Oxford Road Corridor, Manchester Piccadilly, Salford Innovation Triangle comprising Media City and The Quays, Salford Crescent & Salford Foundation Trust, Victoria North. The universities are also working in partnership on the Energy Innovation agency which brings together research, commercial entities and the region as a test bed for new technologies.



- **North East Growth Corridor** including Gateway North, Advanced Materials City, Advanced Manufacturing 'mega' cluster, Advanced Machinery & Productivity Institute supported by town centres in Bury, Oldham & Rochdale
- **Airport and Southern Growth Corridor** including Airport City, HS2, Stockport Town Centre MDC, Medipark, Wythenshawe
- **Eastern Growth Cluster** including Ashton Moss, St Petersfield and town centres in Tameside
- **Western Gateway** including tri modal freight hub at Port Salford, Trafford Park, Carrington
- **Wigan & Bolton Growth Corridor** including radial infrastructure across Wigan Bolton and Bolton Health Innovation Campus.

Whilst the approach within each growth location is distinct, collectively they will drive a levelling up approach across the city-region that is responsive to the inequalities which persist in Greater Manchester, with zero carbon ambitions integral to their design and delivery.

Alongside and integral to our growth locations sits a confident network of interconnected town centres, important locations for shops, services and local employment, and increasingly important as places to live. Greater Manchester has **8 principal town centres**, almost 100 smaller towns and further significant local and suburban centres.

Thanks to our position in the heart of the country, Greater Manchester sits at the centre of the **Northern Powerhouse**. **Manchester Airport** is the UK's third busiest airport and the main international gateway to northern England, supporting the wider visitor, cultural and sporting economy, and creating one of the North's largest logistics clusters.

We are currently building the Bee Network – an integrated 'London-style' transport system that will integrate buses, trams, cycling and walking and other shared mobility services by 2025 at the latest, with commuter rail incorporated by 2030, to transform how people travel in Greater Manchester, and enhance our connections across the wider North.

Greater Manchester's four **Universities and knowledge economy** constitute a globally significant concentration of science, research and innovation assets.

- **Clean Growth** – Greater Manchester's universities are leading globally significant research in nuclear, hydrogen and sustainable materials, with fast growing strengths in smart energy systems and sustainable construction methods. Globally significant assets include the Dalton Nuclear Institute, The Tyndall Centre for Climate Change Research, The Manchester Fuel Cell Innovation Centre, and Salford Energy House
- **Health Innovation** – Greater Manchester has one of the highest concentrations of allied health research in the UK. Corridor Manchester is the strongest single location with its concentration of universities, NHS and private sector assets. Globally significant assets include the Manchester Cancer Research Centre, the Manchester Institute for Biotechnology, The Stoller Biomaker Discovery Centre and Manchester Science Park.



- **Advanced Materials and Manufacturing** – The University of Manchester leads the world in graphene citations and is among world leaders in carbon capture and storage. Globally significant assets include the National Graphene Institute, Graphene Engineering and Innovation Centre and the International centre for Advanced Materials.
- **Digital, Creative & Media** - Greater Manchester has the fastest growing UK and global market share in e-commerce, cyber and broadcast media, anchored around large operations of Government Communication Headquarters, the BBC and E-commerce giants. Globally significant assets include MediaCityUK, the Greater Manchester Cyber Innovation Centre, the AI Foundry and The Manchester School of Digital Arts at Manchester Metropolitan University School of Arts.



Cultural and Sporting Assets

In 2021 Manchester was named 3rd best city in the world by TimeOut, achieving such a respectable positioning due to our creative spirit and the resilience of our communities coming together during the pandemic.

A vibrant cultural and night time offer is vital for any global city and Greater Manchester boasts an internationally renowned cultural, musical and sporting identity. Manchester is recognised as a [UNESCO City of Literature](#) and the wider region is home to national assets that include theatres such as the Lowry, The Royal Exchange and Bury Met; galleries such as Manchester Art Gallery and the Turnpike; nationally and internationally significant heritage assets such as the Rochdale Pioneer’s Museum and the People’s History Museum, and the conurbation’s world-renowned music scene; new, original works at the Manchester International Festival and Factory as well as Orchestra’s such as the Halle and Manchester Camerata, Europe’s joint largest club night, the Warehouse Project, the largest metropolitan festival in the country, Parklife and continued production of some of the most exciting music in the country, including Aitch and Blossoms.

Greater Manchester is recognised internationally as a place of sporting excellence, our world-famous football and rugby clubs including Manchester City and Manchester United, Sale Sharks and Wigan Warriors, as well as our internationally competitive sporting facilities for cycling, cricket and swimming make our sporting appeal second to none. These uniquely Greater Manchester assets enable us to use the language of culture, sport and music to drive collaboration and partnerships overseas.



A Network of Strong Relationships

Over the years Greater Manchester has developed a network of strong partnerships across the world with partner city-regions and countries including China, India, Japan, the US, and places across Europe. We value the importance of people-to-people connections and work hard to maintain these strong relationships, ensuring the benefits of our network are shared and utilised by stakeholders across Greater Manchester.

We are proud to be home to one of the largest diplomatic communities in the UK outside of London and Edinburgh, hosting 15 consulates in total, with consulates such Ireland, Turkey, Spain and Italy opening in the last 18 months A full list of foreign diplomatic missions can be found in **Appendix B**.

The Manchester Consular Association brings together many of Greater Manchester's diplomatic missions, providing a mechanism for them to share knowledge, information and learning as well as connecting them to one another's extensive networks. It is the oldest association of its kind in the UK dating back to the early 19th century when many nations chose to establish a diplomatic presence in Manchester to be closer to the heart of the industrial revolution and the extensive trade links this brought with it.

We value our diplomatic community and we will continue our strong relationship with them, supporting as required and working together on areas of common interest.





OUR WAY OF WORKING

Innovative forms of cooperation between Greater Manchester's private, public and voluntary sector mean we continue to be an example of effective leadership with a unique history of integrated partnerships and a co-ordinated approach to delivery. Devolution has enabled a more co-ordinated approach to delivery across the city-region with greater alignment of strategic planning and investment.

The Greater Manchester Strategy demonstrates our determination to becoming greener, fairer, more prosperous, driven by opportunities in all localities across the conurbation. To achieve this the strategy sets out shared outcomes (the Greater Manchester that we want to see) and commitments (the things we are going to do) to be attained over the period of the strategy, and which are underpinned by collective ways of working. It is only through the realisation of our collective efforts that our shared vision will be attained.

The International Strategy thus plays a central role in delivering many of the commitments listed in the Greater Manchester Strategy in particular in relation to:

- Driving investment into our growth locations and using that to create opportunities in adjacent town and local centres.
- Realising the opportunities from our world-class growth and innovation assets, driven by our Places for Everyone Plan, Local Growth Plans and Industrial Strategy to open up opportunities in all parts of the city-region.
- Supporting our businesses to grow sustainably, to become as prosperous as they can be.
- Supporting the creation of better jobs and good employment that has a purpose beyond growing shareholder value, utilising the opportunity to positively impact on our communities.
- Creating a carbon neutral Greater Manchester by 2038, with better air quality and natural environment.

But we also recognise the important contribution activity related to internationalisation plays in relation to other commitments including for example through ensuring businesses are able to access the skills and talent they need, facilitated through our Mayoral Missions Programme or through our City Youth Dialogues and Exchanges which help support our young people to succeed by giving them a good balance of academic and life ready skills.



Delivering the ambitions we set out in this Strategy will depend on how we work together, as much as what we work on. This will only be achieved via the development and adoption of practices which will enable a consistent approach across sectors, systems, institutions and communities to come together to create good lives for all. These include principles and practices in relation to:

- Leadership
- Environment
- Equality
- Involving stakeholders
- Effective Communication
- Progressive procurement and social value
- Robust quantitative and qualitative evidence-based approaches
- Workforce
- Innovation
- Always working with the future in mind
- Understanding the impacts of our decisions

Greater Manchester has put in place a range of initiatives and tools which will enable these ways of working some of the most important enablers include:

- The Greater Manchester Model of Unified Services
- VCSE Sector Accord
- The Greater Manchester Good Employment Charter
- Greater Manchester's Digital Blueprint

Further information relating to Greater Manchester's joint approach to Ways of Working can be found [here](#).

Across Greater Manchester our stakeholders and delivery agencies are collectively delivering international plans and activities, all playing a part in the delivery of Greater Manchester's International Strategy and our wider strategy portfolio including our Local Industrial Strategy, Economic Vision, the GM Digital Blueprint and Five-Year Environment Plan and Transport 2040. All these strategies state the desire for top-level international recognition and recognise the importance of international collaboration.

As part of the delivery of the Five-Year Environment Plan, Greater Manchester is taking a Mission based approach which brings together over 200 organisations to work collaboratively to deliver the actions needed to reach carbon neutrality by 2038.

It is not the intention of the International Strategy to reproduce their activity in detail, instead to highlight our key international priorities, shared international messages and frame how all elements of internationalisation come together. By working in this way, we ensure we come together on the most important and fruitful priorities, working towards our shared vision of becoming a top global city-region.

Although not directly responsible for delivering the International Strategy or its priorities in their entirety, key stakeholders including the local authorities, the GMCA, the [GM Local Enterprise Partnership](#) and a strong group of delivery organisations all work in partnership between themselves and with national government to play a unique role in helping us to achieve our ambitions.



- [Greater Manchester's 10 Districts](#) – The 10 distinctive districts that make up Greater Manchester have their own assets, international links, and priorities, all of which make Greater Manchester the globally significant city-region it is today, with each playing a part in delivering our International Strategy.
- [The Growth Company](#) – Greater Manchester's economic development arm, helping to drive prosperity in the city-region through a wide range of business support services. This organisation acts as the umbrella organisation to many of our international delivery services, including:
 - [Department for International Trade Northwest](#)
Part of the national trade promotion agency, DIT NW's team of International Trade Advisors assist our businesses with their international trade plans, assisting and encouraging export growth.
 - [Marketing Manchester](#) – Established in 1996, Greater Manchester's destination marketing organisation and official tourism board and Convention Bureau are tasked with promoting the region nationally and internationally as the best place to visit, invest, meet and study.
 - [MIDAS](#) – Established in 1997, Greater Manchester's Inward Investment Agency is responsible for attracting Foreign Direct Investment, Foreign Capital Investment and supporting businesses to successfully relocate or expand in the city-region.
- Our commitment to engaging with high-growth markets is supported by the [Manchester India Partnership \(MIP\)](#) and the [Manchester China Forum \(MCF\)](#), two special purpose vehicles driving forward our agendas with two of the world's largest economies.

- [Greater Manchester Chamber of Commerce](#) – With over 4500 members, GMCC is the UK's largest Chamber of Commerce. The International team deliver export advice, documentation services and a range of support services to exporters and importers.

We also work closely with Manchester Airport, The University of Manchester, Manchester Metropolitan University, The University of Salford, The University of Bolton, The Royal Northern College of Music and UA92 as well as with other stakeholders across the city-region and national government to deliver on our shared international ambitions.





STRATEGIC FRAMEWORK

Over the years we have become acutely aware of the inter-connectivity of all our international activity and we know its effective delivery cannot be done in silos.

The International Strategy's Strategic Framework aims to illustrate the close synergy and inter-connectivity between different priorities, grouping them in to two different categories – **Core Priorities and Enablers**.

Each core priority sets out a series of ambitious targets which have been agreed with our delivery agencies and stakeholders, outlining where Greater Manchester aspires to be by 2025.

We will measure our performance against these targets on an annual basis. As a city-region that is committed to open and accessible reporting we will also report on progress via the International Strategy Dashboard which will be developed following the strategy's launch.

Strategic objectives have been agreed across each priority, setting out how Greater Manchester will work across the city-region to achieve these ambitious targets. These over-arching strategic objectives are supported by an International Strategy Delivery plan as well as our individual delivery agencies respective strategies and annual business plans.

The Greater Manchester Strategy takes a sustainable systemwide approach to ensuring Greater Manchester becomes greener, fairer and more prosperous. Whilst not directly duplicated, progress measurement is aligned to the Sustainable Development Goals, ensuring the city-region is able to track and monitor progress against international benchmarks. Greater Manchester's International Strategy supports the delivery of these goals, ensuring we are playing our global role in delivering the UN's shared agendas of equality, sustainability, and cohesion.



Core Priorities are defined as the central blocks of the internationalisation. They play a key role in adding significant economic value to the region, are easily measured by specific metrics and indices, drive growth and create jobs.

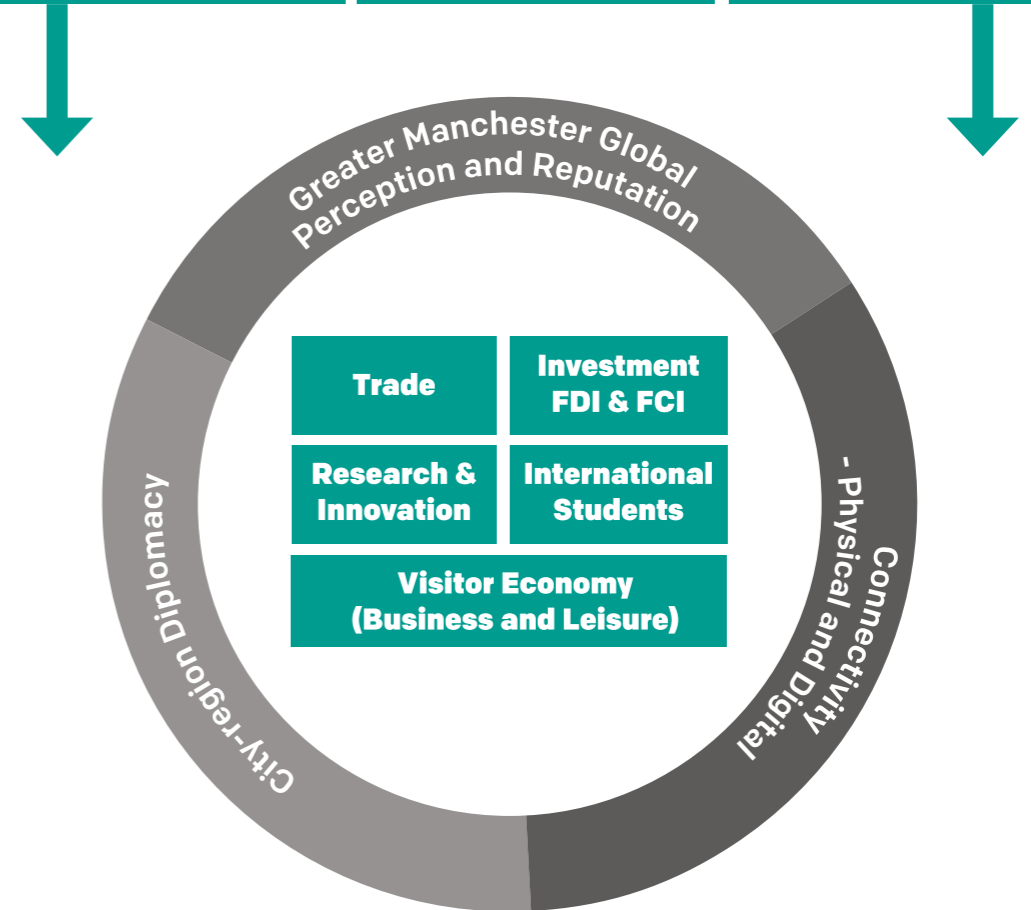
Trade	Investment (FDI and FCI)	Visitor Economy (Business and Leisure)	Research and Innovation	International Students
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Enablers are what gives Greater Manchester its competitive edge and make us unique. They help us connect with the world, learn from others, share our values, and tell Greater Manchester's story well.

Global Perception and Reputation	Connectivity (Physical and Digital)	City-Region Diplomacy
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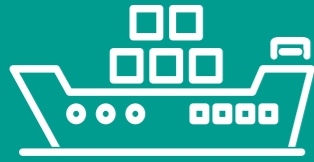
STRATEGIC CONTEXT

Greater Manchester Strategy Good Lives for All	Greater Manchester Local Industrial Strategy	Greater Manchester Economic Vision
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CORE PRIORITIES



TRADE

Improve the export propensity of our business base across the city-region, growing both goods and services exports and diversifying our trade markets.



STUDENTS

Deliver an inclusive, welcoming and world-class international student experience, increasing the number of international students studying at our universities and diversifying our international student base.



RESEARCH & INNOVATION

Promote Greater Manchester as an international leader in innovation with world leading strengths in digital, health innovation, advanced materials, and manufacturing as well as low carbon technology. Continue to attract investment, talent and drive collaboration in these frontier sectors.



INVESTMENT

Increase the number of high-value jobs in Greater Manchester through the attraction of the world's most innovative, green and ambitious companies across our 10 districts, helping to deliver our Economic Vision.



VISITOR ECONOMY

Deliver on our ambition of becoming a world class visitor hub for business and leisure tourism, sustainably increasing the volume and value of business and leisure tourists as well as continuing to attract key conferences and events to the city-region.



Trade

International Trade will play a critical role in our economic recovery. Our Independent Prosperity Review (Appendix D) highlights that those businesses who export are more likely to have higher productivity than those that do not. Growth in export performance is central to improving productivity and ensuring the benefits of internationalisation are felt across the city-region.

To benefit from the transformational benefits of International Trade, we must support our business base to improve its exporting propensity, working closely with DIT and other local stakeholders such as The Growth Company, Greater Manchester Chamber of Commerce, business organisations, academic institutions, and others.

The Greater Manchester Export Plan, developed in partnership with DIT, sits at the heart of our Trade priority. It places a renewed focus on the benefits of exports, outlines how Greater Manchester can capitalise on the UK's new Free Trade Agreements and other high-growth priority markets, setting out key actions for ensuring better coordination of trade support services and activity across Greater Manchester, guaranteeing our goods and service businesses are given the best chance to grow and succeed overseas.

Greater Manchester Trade Performance

In 2019, Greater Manchester's exports totalled over £14.9bn. This equates to approximately 18% of our total GDP. Despite a consistent export performance over the years, our export performance as a % of our total GDP is 12% lower than the UK's average of 30% indicating poor export productivity.

In 2019, £6.6bn worth of Goods were exported by Greater Manchester businesses including Machinery and Transport Equipment, Chemicals and Related Products, Manufactured Goods and Food and Live Animals.

In the same year, £8.8bn worth of services were exported with Financial and Insurance Services being the largest sector, twice as large as Transportation and Storage, with Real Estate, Professional, Scientific and Technical Activities sector being the third largest sector.



Table 1. Greater Manchester Export Summary (Goods)

TOP EXPORT SECTORS – GOODS (2019)		
Sector	Value of Exports	% of Exports
Machinery and Transport Equipment	£1.8bn	27%
Miscellaneous manufactured articles	£1.5bn	24%
Chemicals and related products	£1.3bn	20%
Manufactured Goods	£0.9bn	14%
Food and Live Animals	£0.5bn	7%

Table 2. Top 5 Export Goods Market in 2019

TOP EXPORT SECTORS – SERVICES (2019)		
Sector	Value of Exports	% of Exports
Financial and insurance activities	£3.1bn	35%
Transportation and storage	£1.3bn	15%
Real estate, professional, scientific and technical activities	£1bn	12%
Accommodation and food service activities	£0.4bn	5%
Information and communication	£0.4bn	5%

Table 3. Greater Manchester Export Summary 2019 (Services)

TOP EXPORT MARKETS – GOODS (2019)	
Country	Value of Exports (£)
Germany	805m
Irish Republic	680m
USA	641m
France	466m
Netherlands	308m

Table 4. Top 5 Export Service Markets in 2019

TOP EXPORT MARKETS – SERVICES (2019)	
Country	Value of Exports (£)
USA	1,937m
Italy	584m
Netherlands	528m
Germany	476m
France	369m



An in-depth analysis of Greater Manchester's exports shows that over the last three years, Greater Manchester has maintained strong trading relationships with its "traditional" markets (Germany, Ireland and the USA) while also seeing substantial growth in markets such as China, Japan, Canada, Australia, South Korea, New Zealand and UAE. Some new markets to monitor that are registering fast growth across the Northwest and Greater Manchester in the past three years include Gulf Cooperation Council (GCC), Turkey, sub-Saharan Africa, Latin America and Caribbean (LATAC) and Asia & Oceania.

New Challenges and Opportunities in an Evolving Context

We know that Exporters, like many businesses, are now reviewing their business models to improve supply chain resilience and to ensure they can better respond to the new challenges they face including logistics, supply of labour, upskilling and a widely accepted urgency to transition to net zero.

It is imperative that our businesses recover and adapt to a new way of operating and trading, centred around digitalisation and decarbonisation as well as identifying any new opportunities overseas made possible by the UK's new Free Trade Agreements (FTAs). We will do our best to assist our business base through our support services, reporting back to government on any challenges they face.

Looking Forward

We are confident in our economic foundation, sector strengths and business support ecosystem, we know that with the right investment and support from government, Greater Manchester can champion an export-led recovery, helping to boost productivity, create better jobs and improve the quality of life for all our residents.

The Greater Manchester Export Plan will be key to corralling efforts across our export delivery partners to achieve export growth, building on our existing support offer to assist both new and existing exporters on their international trade journey.

Greater Manchester will also continue to work in partnership with other Combined Authorities across the UK on international activity, sharing resource and expertise as well as promoting our shared international offer in other global markets.

As the UK continues to sign a network of FTAs around the world, Greater Manchester will continue to play a role in fostering relationships between these places and our businesses must continue to make the most of any new opportunities that emerge.

Where do we want to be by 2025?

Our long-term ambition is to grow our goods and service exports at least in-line with the UK's average from our baseline of 2019.



Whilst the outlook for global trade appears positive, we must remain pragmatic and set targets which help drive the right business support services and enable us to monitor our exports effectively.

Over the next three years Greater Manchester aims to:

- Increase as a minimum the value of both its goods and services exports to the same rate as the UK as a whole.
- Increase the average value per export of our existing exporter base
- Increase the number of exporters across the city-region
- Diversify our exporting markets by increasing exports to markets outside of our top 10

We will measure our performance by monitoring the export value of our goods and services across Greater Manchester, our export destinations as well as the average value of each export and total number of exporters.

How will we get there?

Strategic Objectives

- Work with national government on the development and delivery of their new national export strategy and regional export strategy, coordinating efforts to identify sector and market opportunities for the city-region in tandem with the Northern Powerhouse.
- Continue to support our exporters to understand the opportunities and challenges emerging from Brexit and COVID, ensuring where possible that we maintain export market value share within our top markets such as those in the EU and United States.

- Continue to monitor the development of UK Free Trade Agreements and consider what they mean for our business base and our export market diversification. We will continue to work with DIT to promote them and encourage our businesses to explore a wider variety of international markets.
- Coordinate efforts across Greater Manchester stakeholders to improve our international trade intelligence to enable more effective target setting in the future, improve our monitoring mechanisms as well as design and implement more targeted support.
- Continue working to create a fully integrated business export offer through strong joint working with DIT, the Growth Company, Greater Manchester Chamber of Commerce, and the business organisations in delivery planning, sharing of sector/market expertise and maximising 'Northern' export presence at key missions ensuring exporters have the tools and resources to expand into new markets.
- Work in partnership with the FCDO and DIT to develop and enhance existing relationships with the UK's priority markets including the US, Japan and EU, leveraging the region's existing relationships and city-to-city links and political leadership to support exporters to access new opportunities overseas.
- Work in partnership with DIT and the UK Embassy network overseas to deliver Mayoral missions to Ireland and Europe, Bangladesh, Pakistan, Japan, India and the US over the next three years, ensuring that Trade sits as a central priority and our businesses are presented with new opportunities.



Investment

Foreign Direct Investment

Foreign owned companies are worth a total of £37billion to Greater Manchester's economy, employing approximately 172,000 people. Over the last three-year's inward investment from foreign companies has resulted in the creation of 7,484 jobs, adding over £524m to the city-region's economy.

To achieve our ambitions of becoming a more prosperous, greener and fairer place, it is essential we continue to attract the most innovative and ambitious investors from around the world that share our ideals and ambitions, helping to create good job opportunities for our residents.

Increasing our share of FDI will also play a key role in supporting our economic recovery as well as bringing in new ideas, technology, and expertise to solve the challenges we face and accelerating the opportunities we want to develop.

Greater Manchester's FDI Performance

The pandemic heavily impacted the flow of FDI globally. United Nations Conference on Trade and Development (UNCTAD) reported a 42% drop off for 2020/2021. Greater Manchester recorded a 30% drop off in FDI projects in 2020/2021.

Greater Manchester continues to rise-up the value chain with the average project value in GVA terms rising year on year. Manchester was ranked 10th and 12th globally for FDI attraction by IBM in 2018 and 2019 respectively. In 2020, Manchester was the third best performing city in the UK for attracting FDI.

Creative, Digital and Tech and Financial and Professional Services have historically been the strongest sectors for job creation, with Logistics, Manufacturing and Life Sciences following. In recent years we have seen a rapid increase in cross-cutting technology projects across many of our industry verticals.



Greater Manchester's top FDI Markets 2017-2021

Country	Projects	New Jobs	Safeguarded Jobs
USA	72	4,423	1,154
Germany	29	1,727	919
India	21	969	55
Australia	12	201	1
Spain	10	329	92
Sweden	9	381	295
Netherlands	9	349	0
Ireland	9	236	0
China	8	199	0
Canada	7	243	5

Looking Forward

Nationally, Greater Manchester is a key strategic region for the UK thanks to our significant assets, bold economic vision and growing innovative business community. A stronger and more productive Greater Manchester with an increased value of FDI is critical for the delivery of Global Britain and the UK government's levelling up agenda. Greater Manchester's transition to being a carbon neutral city region by 2038 presents a multi £m opportunity to pull in investment. Retrofitting all domestic properties across the region will cost circa £9bn and Energy Generation, storage and wider infrastructure development has an immediate need of cr£1bn.

The bold ambitions and plans laid out in our Greater Manchester Strategy demonstrate our commitment to becoming a greener and fairer city-region. Global companies and investors with shared ideals and values can work with us to deliver this vision and in turn demonstrate their commitment to shared global goals. We plan to achieve our ambition by prioritising investments in R&D; Innovation; Low Carbon and head quarter operations, targeting socially conscious employers, committed to making a positive impact in the communities they invest in.

Looking forward, MIDAS, our Inward Investment Agency will have a renewed emphasis on attracting higher-value, greener and innovative projects that impact across all 10 local authorities.

Global innovation-led investment is a key driver of economic growth which we know will improve our productivity levels. This investment will also help us to accelerate our innovation journey, driving our digitalisation and decarbonisation priorities, helping us to deliver our wider economic vision.

In terms of our priority markets for FDI, Greater Manchester will continue to focus its efforts on attracting investment from our established markets as well as increasing activity in newly identified growth markets.



FDI/FCI Developed Markets	<p>North America: USA; Canada</p> <p>Europe: Germany, France, Ireland, Netherlands, Spain, Italy</p> <p>Asia Pacific: China, Japan; India</p> <p>Middle East: UAE</p>
FDI/FCI Growth Markets	<p>Europe: Denmark; Switzerland; Sweden; Finland</p> <p>Asia Pacific: South Korea, Australia, Singapore</p> <p>Middle East: Israel</p>

Table 5

To increase our share of UK FDI we need the support of our partners – locally, nationally, and internationally. We will work closely with DIT, the Office for Investment as well as key intermediaries across the private and public sectors, which will help to amplify our global reach, as well as generate new opportunities.

Where we want to be by 2025?

Our ambition is to remain a top 10 European location for FDI measured by our performance in the EY European Investment Monitor Attractiveness Survey.

By 2025 we want to increase the proportion of high-value jobs in Greater Manchester to improve our productivity and support our inclusive growth outcomes.

We will monitor our performance by measuring the number of additional jobs created and the number of projects which classify as R&D, Low Carbon or HQ.

We will benchmark our overall performance of UK FDI attraction by increasing Greater Manchester’s average annual % market share of total UK FDI against our 2020 baseline of 3.6% over the strategy period.



How will we get there?

Strategic Objectives

- Target FDI in GM's frontier sectors, focused on attracting greener, transformational projects which support our inclusive agenda, targeting markets and working with places which we have identified as global growth centres of innovation.
- Work across Greater Manchester to re-instil confidence in the investor community, re-building Greater Manchester's reputation as a top destination to live, work and invest with investment opportunities for businesses across a range of sectors including Digital, Creative & Media, Advanced Materials and Manufacturing, Clean Growth and Health Innovation.
- Continue to monitor short term trends and implications for FDI emerging from COVID-19 and the UK's departure from the EU, identifying any challenges and future opportunities, and ensuring the city-region's FDI strategy is steered accordingly.
- Coordinate efforts across our business support organisations to maintain and grow our existing investor base, offering support where possible to add complexity to existing operations, further embedding companies in Greater Manchester's ecosystem.
- Work with national government on the development and delivery of the new national investment strategy, supporting the levelling up agenda and ensuring a fairer distribution of foreign investment across UK regions.
- Support Greater Manchester's 2038 carbon neutrality target, by working closely with our foreign-owned companies to support them on their transition to Net

Zero, ensuring we mitigate divestment threats and secure high-value green reinvestment.

- Translate the city-region's strategic vision into strong sector propositions and defined market opportunities for international investors and businesses through the development of new propositions around emerging sectors such as Clean Tech, Digital and Cyber, including working with government on the delivery and roll out of additional High Potential Opportunities and strong local focus on developing the skills and talent needed in these sectors/sub-sectors.
- Continue to emphasise the strategic importance of UK government working in partnership with Greater Manchester on transformational strategic projects such as Gateway North, giving the GMCA and our IPA a voice at the national table, and
- Continue to lobby national government, DIT and the Office for Investment to develop greater incentivisation and co-investment subsidy models for English regions, ensuring the UK continues to remain successful in attracting FDI and delivering on Global Britain.

Foreign Capital Investment

The current evidence base for Greater Manchester's Foreign Capital Investment (FCI) is incomplete and largely driven by the large-scale investments in major property schemes – rather than venture capital – type investment and investment into research – giving us an unclear picture of the full nature and scale of FCI in Greater Manchester. Although figures are hard to measure and track, estimates indicate that over the previous strategy



period capital investment into property totalled over £4bn, primarily originating from the USA, UAE, Hong Kong and Mainland China.

Greater Manchester has a strong and well-integrated internal network, working closely together on key strategic issues. This provides us with an ability to link up opportunities strategically beyond any initial scope of interest. The development of Innovation Greater Manchester and other large scale strategic projects will create a pipeline of investable propositions for capital and corporate investment, attracting large scale and strategic investments from sovereign wealth funds and institutional investors.

Recent national deals such as the UAE's commitment to invest £10bn into the UK over the next five years presents significant opportunities for Greater Manchester. We will continue to work across our 10 districts to develop a pipeline of strategic investable opportunities.

Research and Innovation

Innovation has always been at the heart of Greater Manchester, with the city-region boasting an impressive history of "world firsts". Our Independent Prosperity Review identified the region's strong, integrated innovation system with strengths in areas such as Health Innovation, Life Sciences, Digital, Cyber, CleanTech and Advanced Materials.

Our universities also have globally significant strengths in areas such as Biotechnology, Cancer, Energy, and Global Inequalities, all playing their part in addressing some of the biggest challenges facing our planet.

Greater Manchester is a leading city-region in the delivery of international research innovation partnerships, particularly in Europe with our universities, public and private sector organisations being active participants in the EU R&D&I programme, Horizon 2020. The latest EU figures suggests that Greater Manchester institutions have been involved in more than 480 cross-border research and innovation partnerships in the last seven years, with an investment value of over €260 million (£220 million). This funding has been vital for supporting key flagship projects across the city-region. The UK is in the process of finalising its association with Horizon Europe, the new €95 billion research and innovation programme for 2021-27, which will give UK institutions full access to the majority of the new programme with the same terms and conditions as a Member State. We will continue monitoring the success of our institutions including local authorities in securing funding from the new programme.

Innovation Assets

Our globally significant innovation ecosystem is underpinned by our distinctive strengths and science and research assets and is backed by innovation districts. Our size and scale enable organisations and start-ups to drive the commercialisation of pioneering products and services for global exporting, and our positive approach to collaborating with the private sector means companies can coalesce to tap into wider networks and support services.



We are proud to be home to two high impact, globally significant innovation zones including the [Manchester Oxford Road Corridor](#), home to two universities and Manchester Foundation Trust; and [Salford Innovation Triangle](#), a rapidly developing urban innovation zone with three district innovation districts— MediaCityUK, Salford Royal Foundation Trust and the University of Salford.

Further developments are now underway including [ID Manchester](#), part of the Oxford Road Corridor, the [Salford Crescent](#) re-development as part of Salford Innovation Triangle, [Rochdale-Bury Gateway North](#) and the [Stockport Mayoral Development Cooperation](#), all of which will further position Greater Manchester as a globally leading innovation region.

The [Rochdale-Bury Gateway North Manufacturing Innovation Park](#) is the largest strategic site in Greater Manchester and a core component of growth plans for the city-region in the next 20 years. This site will host the North West's newest and largest Manufacturing Innovation Park with a cluster of new research and interconnected training facilities focusing on advanced materials and manufacturing, and modern construction methods, linked to the strengths of the universities in the city region. A key strategic asset for delivering on our net-zero ambitions and encouraging the commercialisation of R&D.

Advanced Materials

Greater Manchester is the home of graphene and other revolutionary 2D and advanced materials. Our emphasis on commercialisation and a lab-to-market pipeline is critical for ensuring the city-region reaps productivity benefits from its innovation capabilities. Our emphasis on commercialisation and a lab-to-market pipeline is supported by the recent successful development of concretene an initiative led by Nationwide Engineering, signalling the vast practical applications of our innovative materials.

With state-of-the-art facilities including the National Graphene Institute, the Graphene Engineering Innovation Centre, and the Henry Royce Institute for Advanced Materials Research and Innovation, Greater Manchester is well-placed to capitalise on its £8bn manufacturing sector as we enter the fourth industrial revolution.

Greater Manchester Civic University Agreement

In October 2021, our 5 higher education institutions signed a [Civic University Agreement](#) alongside the Leaders of Greater Manchester's 10 districts to drive social and economic change in the city-region focused on six priority areas, drawing on what people in Greater Manchester told us they valued about their universities. Priorities include education and skills; reducing inequalities; jobs and growth; the digital economy; net zero; the creative and cultural economy.



Cyber

Manchester is now home to the UK's government security agency, GCHQ, placing the city at the heart of the nation's IT security effort. The national agency established a strategic hub in Manchester bringing with it hundreds of jobs and a supply chain of innovative cyber companies that will now form part of a wider North West cluster alongside the National Cyber Force in Samlesbury.

Already recognised as a centre of cyber security excellence, Greater Manchester is not a city to rest on its laurels – it aims to establish itself as a world-leading cyber super hub and has the infrastructure, leadership and mandate to make it happen. Key initiatives include the Greater Manchester Cyber Innovation Centre which facilitates the growth of cyber security businesses and hosts a collaborative space for tackling cyber threats as well as the [GM Cyber Foundry](#) which encourages engagement between a range of businesses on cyber innovation research.

Our approach to industry skills and labour market intelligence has also led to the development of a GM Cyber Advisory Group, working with employers to take forward targeted initiatives around skills, jobs and career planning in the sector, to make sure businesses can get the talent they need.



The Energy Innovation Agency

The Energy Innovation Agency is a collaboration between Greater Manchester Combined Authority (GMCA), The Growth Company, Hitachi Europe, Bruntwood, SSE Enterprise, The University of Manchester, Manchester Metropolitan University and the University of Salford. It has been created to bridge the “innovation gap” that is a key barrier for Greater Manchester reaching its aim of having a zero-carbon footprint by 2038. Key areas of focus for the Agency are:

- Decarbonisation of the energy system
- Scaling the best clean energy initiatives across the region and beyond
- Rapid deployment of energy efficiency and clean energy technologies
- Encouraging investment in the city region



Looking Forward

Despite our strengths, strong track record and growing innovation ecosystems, we know there is a gap in our research and innovation productivity.

We must better leverage our science and innovation assets to become more productive and globally competitive. Capitalising on this will improve our ability to commercialise innovative ideas, increase exports and drive the attraction of FDI and international talent to the city-region, supporting growth across our 10 districts.

Innovation Greater Manchester is part of our ambitious plan to help deliver this. A blueprint to create a new place-based partnership to build on our existing R&D assets and local delivery capacity to drive innovation led-growth across all the city-region's diverse towns and cities.

It has never been more important to connect with the world. A more innovative Greater Manchester means a more internationally competitive business base. Internationalisation is a key priority for our universities and many of our businesses, and we know that to deliver on our ambitions locally we must look outwards. Looking forward we must:

- Promote our frontier sectors internationally and drive investment into our innovation assets and clusters.
- Continue to attract international talent and retain the world's best researchers and international entrepreneurial talent.

- Improve our ability to commercialise opportunities derived from our research strengths, supporting our businesses to export new ideas, forging globally leading supply chains which will improve our trade productivity and technology processes.
- Support our scientific community wherever possible to drive cross-border R&D cooperation, frontier research and challenge-driven innovation.
- Leverage our international networks and relationships to deliver on our innovation priorities, learning from working with and connecting to globally leading innovation ecosystems and clusters.

Where do we want to be by 2025?

Our long-term ambition is for Greater Manchester to be recognised as an international leader in research and innovation, with strengths in Digital/Cyber, Health Innovation, Advanced Materials and Manufacturing and Clean Growth, a place where the economic benefits of innovation are felt across the conurbation and our ideas are turned in to solutions that are shared with the world, helping to address some of societies greatest shared challenges.

We will measure our performance by monitoring our universities' positions on the QS ranking, ensuring our Universities strive to at least maintain their current ranking (including remaining within the top 30 for the University of Manchester as well as increasing the number of R&D intensive FDI projects landing across the city-region and the number of cross border international R&D projects undertaken by our academic institutions reported by UKRI and Horizon Europe.



How will we get there?

Strategic Objectives

- Work with government to use Greater Manchester's assets to put the UK at the forefront of global innovation, supporting Global Britain by leveraging our key sectors such as health innovation, digital, clean technologies, and advanced manufacturing/materials.
- Drive investment into the Innovation Greater Manchester platform in order to crowd in private sector investment and accelerate the development of new assets and ventures of global significance that will pioneer solutions to net zero and health inequalities.
- Work in partnership with government to continue attracting large transformational projects in our key sectors which will help transform industries and their supply chains, catalysing the development of world-leading advanced materials, life sciences and low carbon technology clusters
- Through Innovation Greater Manchester forge new relationships overseas with global innovation leaders including cities such as Boston, Austin, Shenzhen and Tel Aviv, as identified in Innovation Greater Manchester We will also work with national government and independently to build on our relationships with countries such as the US, China, Canada, Ireland, South Korea and Japan, given their innovation capabilities, commercialisation and trade opportunities for our business base.
- Develop city-to-city relationships and cluster partnerships with leading innovation clusters that promote collaboration between institutions, innovation hubs and businesses and connect international scale up programmes to support cross border R&D.

- Given Greater Manchester's active participation in Horizon Europe and the significant benefits that the EU programmes have brought into Greater Manchester, continue lobbying for full participation in Horizon Europe and highlight any funding gaps left by the UK's decision to opt out of future EU programmes, particularly our ability to fund international innovation pilots within our local authorities from programmes such as Interreg or the Urban Innovative Action.

Visitor Economy (Business and Leisure)

In 2019, tourism contributed £9bn to Greater Manchester's economy, sustaining over 101,000 jobs. Conferences alone contributed spend of £862m, indicating the significant economic contribution both business and leisure tourism make for the city-region's economy and the sectors important role in supporting our foundational economy.

International inbound visits have grown consistently since 2009 with visits increasing 55% between 2014 and 2019, 39% ahead of the national average. Other achievements over the last three years include:

- Securing a first-of-its-kind devolved regional tourism agreement with Visit Britain to deliver campaign activity for the North of England in our role as gateway to the North;
- Securing a £1m marketing partnership with New York and Company, a first of its kind between a UK city-region and New York
- The publication of the Greater Manchester Business Tourism Strategy (2019 to 2025), which delivered jointly with industry, sets out the city-region's ambition to be a leading conference destination.

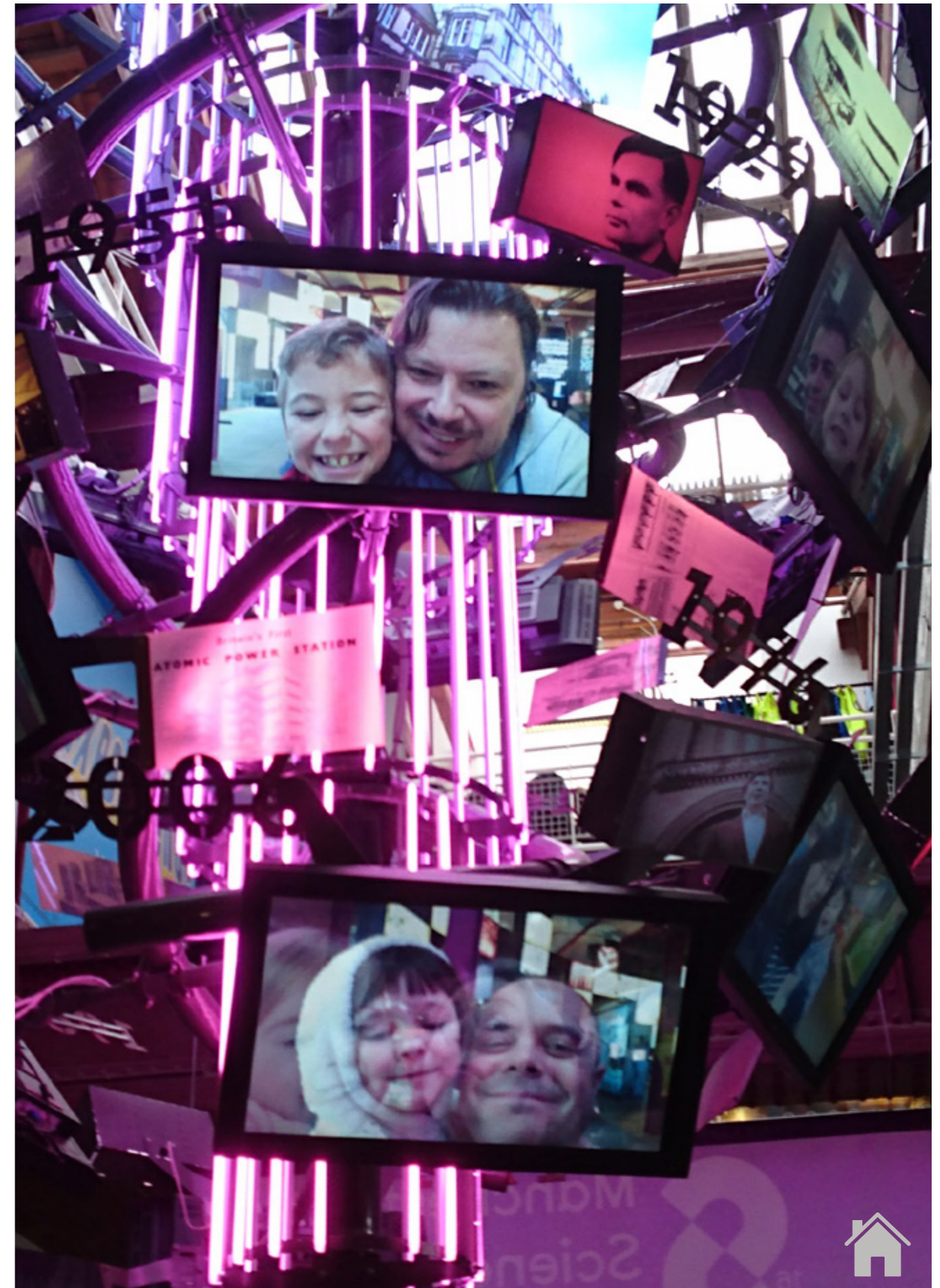


We are proud of our progress over the last few years and recognise the significant benefits of a thriving tourism sector, however, as we look to rebuild and recover we must also acknowledge the potential environmental impacts of tourism and ensure we work more closely with both Manchester Airport and the leisure sector across Greater Manchester to grow tourism sustainably, recognising the difficult trade-offs that must be made.

Greater Manchester's Visitor Economy Trends

While Europe and the USA top the list of Greater Manchester's international visitors in terms of volume, the last decade has seen more rapid growth from the rest of the world and Gulf Cooperation Council (GCC), with China and India now joining the USA and the Republic of Ireland in respect of sitting in the top five markets for international visitor spend.

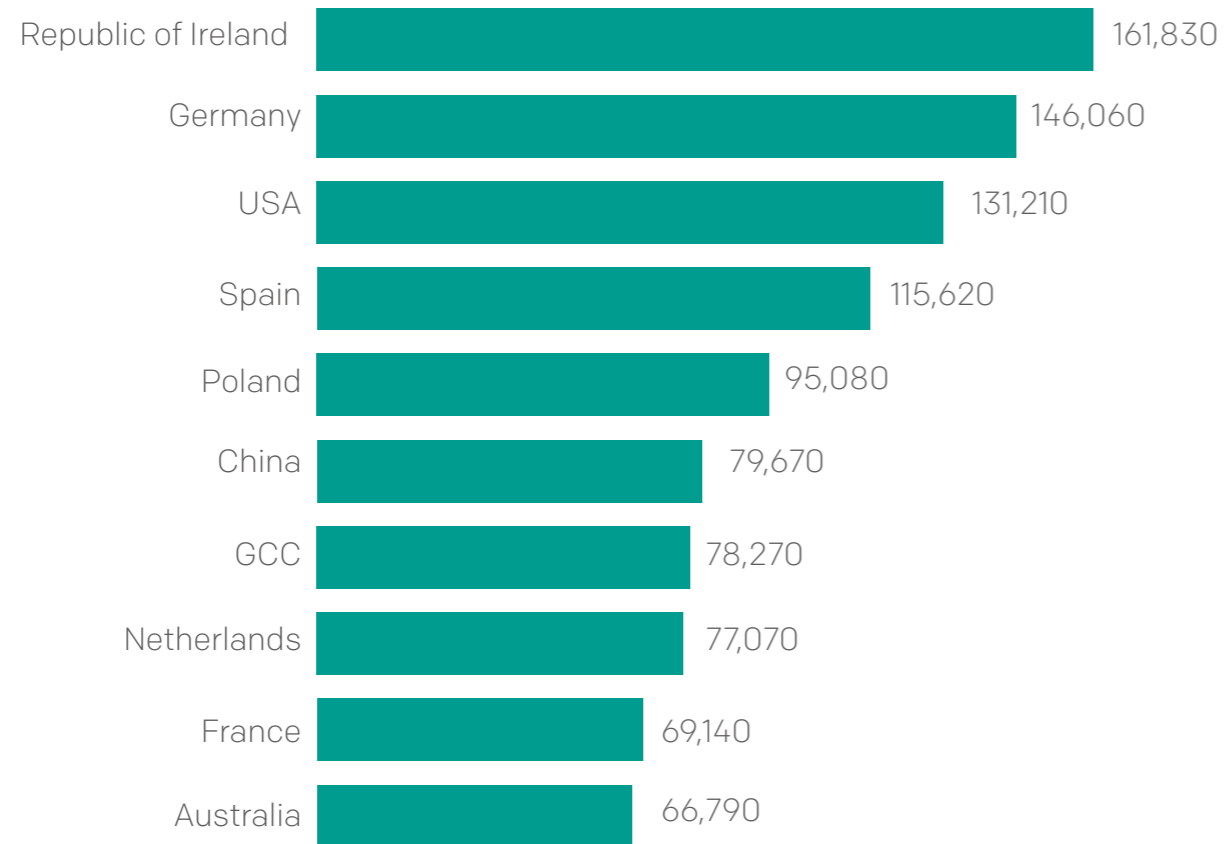
Over the years, the city-region has seen growth in visitor value and volume, although the share of international visits to the UK is dominated by London, which receives 53% of all visitors to the UK. Greater Manchester as the gateway to the North has an important role to play in levelling-up the economy by increasing tourism share outside of London.



The below table outlines Greater Manchester's Top 10 Visitor Markets for total visitors and visitor spend in 2019.



**International Visitors
Main Markets (no. of visits in 2019)**



**International Visitors
Main Markets (spend in 2019)**

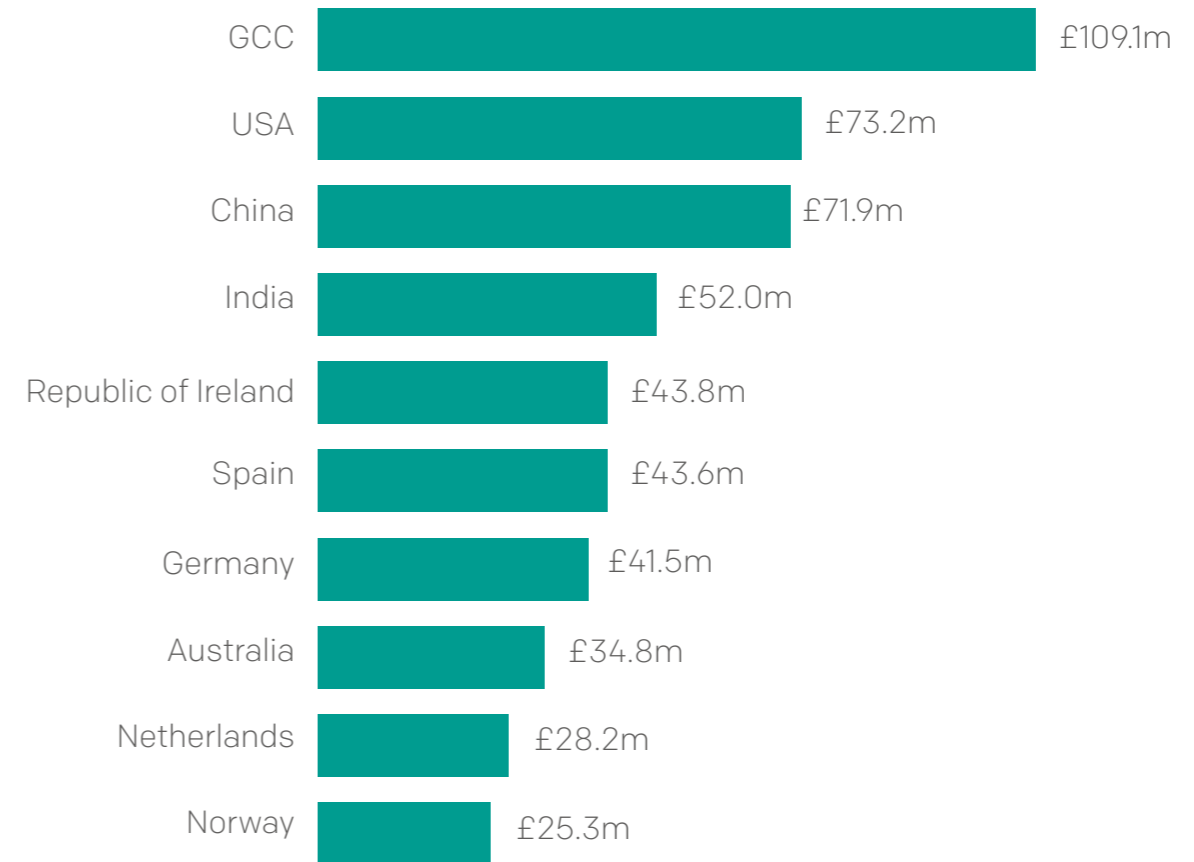


Table 2. Greater Manchester's Top 10 International Markets – Visitor Numbers (left) and Spend (right)



Visitor Numbers

	Country	% GM Growth 2014-2019	% UK Growth 2014-2019
1	USA	55%	51%
2	Spain	32%	2%
3	China	158%	148%
4	GCC	70%	79%
5	India	218%	66%

Table 6. 2014-2019 Growth of Greater Manchester's Priority Markets versus UK Growth (Visitor Numbers)

Total Market Spend

	Country	% GM Growth 2014-2019	% UK Growth 2014-2019
1	India	539%	64%
2	GCC	157%	59%
3	USA	42%	42%
4	Spain	17%	-21%
5	China	-38%	64%

Table 7. 2014-2019 Growth of Greater Manchester's Priority Markets versus comparative UK growth (Visitor spends)

* *Caveat: The International Passenger Survey is intended to provide robust data at the national level with regional-level data providing an indication on trends. Sub-regional level data is using small sample sizes and therefore VisitBritain flag caution at using single year data at the sub-regional level. There is an ongoing review into the methodology and samples for the International Passenger Survey and this is subject to change going forward, depending on the outcome of the ONS Review that is due to report early 2022.*

New Challenges and Opportunities

The pandemic has been a significantly challenging time for Greater Manchester's Visitor Economy, at its peak it wiped around 70% of the value created by the sector from Greater Manchester's economy. VisitBritain forecast this will not return until 2024.

It is widely recognised that recovery of the visitor economy will take longer for city-region destinations due to the increased role international markets play. Route connectivity remains much reduced in 2021 on pre-pandemic levels following restrictions placed on international travel by UK and overseas governments; this is also affecting consumer confidence to book in advance and drive future demand and growth.

Despite the challenges the sector is resilient and remains optimistic. The recovery is also providing the sector with an opportunity to set themselves on a greener and more sustainable path, providing good jobs as well as protecting our culture and natural assets.



In recent years over £200 million has been invested in Greater Manchester's cultural institutions, with great success despite the pandemic, at attractions such as RHS Garden Bridgewater which opened in May 2021. There will also be further hugely significant investment in the coming years with major attractions currently in development including Therme Manchester, The Factory, Co-Op Live, and Modern Surf Wave Centre, whilst the hotel sector also continues to thrive with around 7800 new hotel bedrooms in the pipeline across Greater Manchester over the next five years.

Looking Forward

The ambition continues for Greater Manchester to be "a world class visitor hub for business and leisure tourism". Immediate priorities focus on building on recent successes and looking to support the sustainability and recovery of the sector.

In the short term, priority will be given to activity that can restore confidence in Greater Manchester as a visitor destination. Activity will focus on generating business and investing in longer-term growth markets with additional emphasis being placed on growing the city-region's international conference and events market.

In the longer term, and to remain internationally competitive in both business and leisure tourism, a significant step change is required to drive positive change for the future of Greater Manchester's visitor economy so the city-region continues to be a top global destination for business and leisure tourism. Collaboration and coordination across our hospitality, culture, music leisure and sports offer are key to achieving this.

Recognising the importance of the Tourism Sector to the city-region and to support growth in the sector, in early 2022, Marketing Manchester on behalf of Greater Manchester and the tourism industry, plan to publish a five-year Greater Manchester Tourism strategy. This strategy will set out a framework for the future growth ambitions of the sector, outlining our key priorities and specific asks of government.

Where do we want to be by 2025?

The ambition continues for Greater Manchester to be a world class visitor hub for business and leisure tourism, working to ensure that the economic impact and benefits of tourism are felt across the whole of Greater Manchester.

Compared to the baseline of the last 3 years (2018 to 2021), over the next three years Greater Manchester aims to:

- Increase both the value of international leisure and business tourism (International Passenger Survey - IPS)
- Increase the volume of international leisure and business tourism arrivals through Manchester Airport (IPS)
- Increase Greater Manchester's overall share of UK international visitors (IPS)
- Increase the economic impact of international conferences to the city region
- Increase awareness and reach of Greater Manchester's tourism, hospitality and leisure sector (THL) offer in priority markets



We will measure our performance by monitoring the:

- Volume and value of international visitors to the city-region (via IPS)
- Percentage of UK International visitor market share (via IPS)
- Economic impact of business conferences and sporting events

Strategic Objectives

- Support and sustain the visitor economy sector as we live with COVID-19 and then support the rebuilding and recovery, working with the Greater Manchester Tourism Industry Economic Recovery Group and with the private sector, Local Authorities, as well as other promotional partners including other destination marketing organisations and VisitBritain to re-instil confidence in consumers to travel locally, nationally and internationally.
- Continue to lobby government about the important role Destination Marketing Organisations like Marketing Manchester play in supporting and delivering the national Tourism Recovery Plan, and increase their influence in national decision-making.
- Work with the travel trade in-market to grow back passenger numbers and increase the number of international passengers arriving at Manchester Airport.
- Retain and increase Greater Manchester's international visitor market share as the alternative gateway to the UK .
- Support and sustain the business and conference sector as we live with COVID-19 and as we shift to rebuilding and recovery and identify and attract major new sporting



and cultural events to be held in the city-region as well as domestic and international business conferences and events that align with and reinforce Greater Manchester's priority sectors.

- Promote Greater Manchester's cultural, sporting and hospitality assets to gain further recognition as a vibrant global city-region.
- Build on the successes of Greater Manchester's devolved delivery contract with Visit Britain to secure a new sustainable structure for tourism and place promotion focused on greater devolution and anchored around a new 5-year tourism strategy.
- Work with the Department for Digital, Culture, Media and Sport (DCMS) to establish a network of Destination Marketing Organisations that improves the UK's competitiveness and productivity in the visitor economy sector and for Global Britain.



International Students

Greater Manchester has the largest higher education (HE) international student population outside of London with over 21,00 international students from more than 160 different countries.

In the 2019/2020 academic year, 20% of Greater Manchester's total HE student population came from outside of the UK (this was up from 19% from the previous year). Greater Manchester's HE international student population made up 4% of the UK's total international student population.

Table 8. Top 20 International Student Markets in Greater Manchester (2019-2020) ⁶

Rank	Market	%
1	China	33.43
2	India	5.43
3	Malaysia	3.92
4	Kuwait	3.52
5	Saudi Arabia	3.21
6	Romania	Less than 3%
7	Nigeria	
8	Hong Kong	
9	Spain	
10	Italy	

Rank	Market	%
11	Greece	Less than 2%
12	Cyprus	
13	France	
14	United States	
15	Germany	
16	UAE	
17	Korea	
18	Ireland	
19	Pakistan	
20	Poland	

International students are not only a source of tuition income, enabling our universities to improve their offer and research capabilities; they bring with them significantly broader benefits to the city-region, including:

- **Adding to our diversity and culture** – International students enrich our university campuses and city-region both academically and culturally, helping make Greater Manchester one of the most culturally diverse city-regions in the UK.
- **Help drive growth and jobs** – The net economic contribution of international students and any visiting friends and relatives not only helps drive growth and jobs within universities but their wider off campus expenditure has broader positive implications on the local property, retail and leisure sectors in Greater Manchester.



A report published by Oxford Economics in 2018 calculated that for every 11 Non-EU students to the UK there was a £1m net economic benefit (tuition fees, non-tuition expenditure and average visitor income). Based on this methodology Greater Manchester's Non-EU International students supported the generation of over £1bn to the city-region's economy annually.

- **Entrepreneurial talent and unique skill sets** – International students are a source of entrepreneurial talent and help to address skills shortages, key assets for the delivery of our priorities.
- **Life-long ambassadors** – International students can be life-long ambassadors to Greater Manchester. Many alumni have strong professional and personal links to the city-region and it is important to recognise the soft power benefits these networks bring in the longer term.

International Student Recruitment

Following the UK's departure from the European Union, Greater Manchester anticipates student recruitment from the EU becoming more challenging due to increased tuition fees and the UK no longer being part of the Erasmus programme. While students from countries such as Germany and France are likely to continue to come to Greater Manchester, Brexit is expected to impact on student recruitment from countries such as Romania where there is a heavy reliance on loans and funding. Brexit will also affect the UK's ability to participate in student exchange programmes such as Erasmus.

Greater Manchester Youth Mobility

Following our departure from the EU, the UK has introduced the Turing Scheme to support UK higher education and college students to work or study abroad. Unlike Erasmus, the programme not only covers Europe but also other countries such as Canada, Japan and the US.

Student mobility provides young people with the opportunity to gain valuable skills and experience in an international environment. A 2017 CBI survey identified intercultural awareness as a weakness for graduate job seekers and Universities UK International (UUKi) research has found that students who go abroad are more employable than those that do not. We want our young people to be equipped with the tools they need to benefit and thrive in a globalised society. We will work with our universities and colleges to ensure our young people make the best of the opportunities that Turing and other schemes may offer to them.

Looking Forward

Greater Manchester is committed to coordinating efforts to protect its international student pipeline, ensuring the city-region continues to be perceived as a vibrant, welcoming place and remains a top study location globally.

The pandemic brought to light the significant risk that an over-dependence on one particular market can have. Greater Manchester should also consider how it can take advantage of the new Graduate Immigration Route to diversify its student population across a wider range of markets, including increasing student numbers from markets such as India, Malaysia, Singapore, Nigeria, Hong Kong, UAE and Pakistan.



Increased competition for international students means the region must come together to support Greater Manchester's universities in providing a strong place offer in addition to our institution's academic excellence. Opportunities include working more closely to tell our place and sector story well; the development of work experience and exchange programmes providing an opportunity for students to connect more closely with the city-region and becoming part of its growth and success.

Where do we want to be by 2025?

We want to increase the number of international students studying at Greater Manchester's Universities ensuring we utilise the new graduate immigration scheme to diversify our international student base compared to the baseline of 2020.

We will measure our performance against this by monitoring our international student numbers and the percent of students coming from markets outside of our top 5.

How will we get there?

Strategic Objectives:

- Coordinate efforts across Greater Manchester to promote the region as a welcoming and vibrant place to study.
- Stride ahead of our competitor cities to enhance Greater Manchester's student offer, ensuring we remain competitive globally as a great place to study, using our extensive international relations and networks to drive new and innovative activity and support student integration and assimilation.

- Explore what opportunities the new Graduate Immigration Route presents for supporting the diversification of Greater Manchester's international student population and for increasing the number of international students who chose to stay and work in Greater Manchester after graduation.
- Consider how Greater Manchester can better engage with the city-region's universities to engage with the international Alumni network, recognising that international students are life-long ambassadors for the city-region.



ENABLING PRIORITIES



CONNECTIVITY

Physical connectivity via Manchester Airport is a key for delivering our core international priorities. The pandemic has had a devastating impact on long-haul connectivity and we must work with Manchester Airport to re-instate these lost routes. We recognise the significant net zero challenge facing the aviation industry and are committed to working closely with Manchester Airport as they work towards full net-zero operations by 2038.

Digital connectivity has diminished geographical borders, enabling us to collaborate more innovatively and effectively with international partners. We will continue to increase our online international activity to drive our core priorities and amplify our voice on key policy areas.



MARKETING AND PERCEPTION

Greater Manchester has successfully continued to communicate its story to the world, making strides to increase its rankings in a range of global indices. We regularly outrank large competitor regions, joining capital cities in global indices.

We will continue to invest in our international marketing campaigns and branding, ensuring we deliver on our ambition to remain a globally recognised and competitive international city-region.



CITY-REGION DIPLOMACY

Greater Manchester is recognised as a key diplomatic hub in the north of England, hosting a total of 15 foreign diplomatic missions and has strategic partnerships with city-regions in Europe, China, South Asia, Japan, and the USA.

City-region Diplomacy is a powerful enabler for our International Strategy, facilitating engagement on the global stage on agendas that are important to us, strengthening links with other global cities and supporting the delivery of our core international ambitions. Our aim is to further strengthen and develop these relationships to deliver on our international priorities and wider policy ambitions.



Greater Manchester's Global Perception and Reputation

Over the last few years, Greater Manchester has successfully continued to communicate its story to the world, making strides to increase its rankings in a range of global indices. As a city-region with a long history of international appeal and success, we regularly outrank large competitor regions to join capital cities in global indices and in September 2021 Time Out ranked Manchester as the 3rd best city in the world.

Looking Forward

To further monitor Greater Manchester's standing in global indices, work began in October 2020 to establish an approach to assessing the merit and impact of these indices as a measure of success. It was agreed by the Internationalisation and Marketing Board (IMAB) in May 2021 that 16 indices that represent areas of strategic importance for Greater Manchester should be monitored over the next three years with a view to influencing Greater Manchester's ranking through provision of up-to-date data sets and information. These indices include:

- Resonance World Best Cities
- Mercer Quality of Living Survey
- EY European Investment Monitor
- FDI European Cities of the future
- Savills Tech Cities.

Greater Manchester's strategies such as the Economic Vision, Local Industrial Strategy, GM Digital Blueprint and Five-Year Environmental Plan, recognise that by excelling on our growth and inclusivity outcomes the city-region will increase its productivity and attract greater external investment.

The recent 2021 ANHOLT-IPSOS Nation Brands Index saw the UK slip from 2nd to 5th position. This reinforces the importance of demonstrating and communicating that Greater Manchester as a welcoming, inclusive, healthy and sustainable city-region.

Where do we want to be by 2025?

Over the next three years, through the delivery of international marketing campaigns and investment in our branding, we believe that Greater Manchester will continue to remain a globally recognised and competitive city-region.

We will measure our progress against the Resonance World Best Cities index, ensuring that by 2025 Greater Manchester retains a Top 100 spot.

How will we get there?

Strategic Objectives

- In response to the emerging challenges of COVID-19, continue promoting Greater Manchester as a welcoming, diverse and vibrant city-region and a great place to visit, invest, meet, study and live.



- Recognise the critical importance our place assets have in building a globally competitive region, coordinating efforts across Greater Manchester to lobby government and secure additional investment in our offering recognising the importance that culture and life enriching qualities bring to our residents.
- Tell Greater Manchester's story to the world, initiating focused and sustained communication of Greater Manchester's ambitions, unique selling points and frontier sectors through our Green, Digital and Innovation campaigns.
- Strengthen Greater Manchester's global position and perception by implementing the [Business of Cities research](#) recommendations and Benchmarking work published in October 2019, ensuring we continue to track our progress against our defined indices, driving resource and investment in to improving our international perception.
- Develop a new public and private model for promoting Greater Manchester and delivering international activity.



Connectivity

Greater Manchester has long recognised the importance of connectivity to the rest of the world. In the 19th century the pioneering Manchester Ship Canal made the city Britain's third busiest port, despite being 40 miles inland. Over a century later, Greater Manchester has invested heavily in the rapid growth and development of Manchester Airport as a gateway for the region and the North of England more widely. This high-quality connectivity has supported the creation of a thriving and prosperous economy in our city region over recent decades.

Connectivity is an important enabler for the delivery of Greater Manchester's international ambitions. Physical connectivity, particularly through Manchester Airport, has broader economic benefits that include supporting trade and investment and increasing international students and visitors.

Digital connectivity is critical to our international competitiveness and plays an enabling role in supporting connections overseas, facilitating trade, investment and collaboration. The pandemic accelerated our adoption and further acceptance of digital technologies, enabling us to connect and trade overseas in new ways.

Improved Freight Connectivity - Port Salford, situated on the banks of the Manchester Ship Canal is proposed to be the UK's first tri-modal inland waterway port which will be served by ship, rail and road. It will be one of the 14 ports across the Northwest linked to Liverpool City-Region's Freeport, helping businesses to benefit from tax relief and a reduction in red tape. Port Salford and the Liverpool Freeport are critical infrastructure for helping Greater Manchester and the wider Northwest become a hub for global trade and investment.

Direct Air Connectivity – Manchester Airport

As the UK's third largest airport, Manchester Airport is a critical infrastructure asset and key driver for internationalisation and economic prosperity in Greater Manchester and the wider North. In 2019, the airport served 29 million passengers, with routes to more than 200 destinations, as well as the freight terminal managing import and export cargo of a total value exceeding £6.8bn. Indeed, the international connectivity afforded through the airport, Airport City and development of the wider integrated transport system connecting the airport to all parts of Greater Manchester and the wider North, will be important in levelling up and rebalancing both the local and national economy, providing a counterweight to London and the South East.



Manchester Airport is the only airport across the whole of the North with a sufficient catchment, size and scale to sustain the most valuable long-haul connectivity. The airport has seen a steady increase in new routes over the last 10 years, including to the likes of Hong Kong, Beijing, Mumbai, Delhi, Addis Ababa, San Francisco, Los Angeles and Houston.

In July 2021, Manchester Airport opened the new Terminal Two extension – the centrepiece of the landmark Manchester Airport Transformation Programme, which is part of Manchester Airport Group’s £1bn investment in the North’s international gateway to the world. This offers a modern, carbon neutral airport experience for people across the North, increasing capacity and improving customer experience.

The measurable benefits from the inaugural direct route between Manchester and China is the latest proof that improving connectivity to Manchester Airport has a tangible positive impact on inward investment, exports and visitor numbers not just for Manchester, but across the North, building the economy, creating jobs and supporting the Government’s levelling up agenda.



Case Study – Manchester to Beijing – “2-Years In” – Economic Impact Study⁸

In June 2016 the first ever direct flight service between the North of England and mainland China launched in partnership with Hainan Airlines. The two-year economic impact study jointly published by Manchester Airport and the Manchester China Forum captures the positive impact that direct connectivity with a high growth market can have in facilitating the flow of people, goods and services. The economic impact study indicated that in many cases the city-region’s increasing levels of trade, tourism, investment, and knowledge exchange were outstripping national averages with export values from Manchester to China increasing by 41% and international Chinese student numbers growing 5% more quickly than the national average.

Looking Forward

The pandemic has had a devastating impact on the airport, with travel restrictions limiting passenger volumes to below five per cent of normal levels for long periods. Going forward it will be important to ensure that the airport recovers so that it remains internationally competitive and connected to as many international markets as possible to ensure the economic prosperity of the conurbation and wider North, and that this is delivered in a sustainable way.

Our carbon neutral 2038 target and our carbon budget includes operational emissions from the airport. In our science-based target analysis we assumed that, at a



national level, emissions from aviation will not grow any further and that from 2030 emissions will steadily drop to zero, in line with aviation industry targets.

The airport's operations (i.e. emissions generated by the airport itself, including the operation of ground support vehicles but excluding emissions from aircraft) are already certified carbon neutral. However, aviation is one of the most challenging industries to decarbonise. Whilst some of the necessary technologies, such as improved airspace management and sustainable aviation fuels are near term, the introduction of hydrogen and electric aircraft is still some way off, with the first aircraft expected to enter service in the mid-2030s.

We want to make sure that our policy on aviation matches our ambition to be a world leader on climate action, in line with our carbon neutral 2038 target and our carbon budget. In driving this Greater Manchester partners will work with Government and other stakeholders to help to influence UK aviation policy, including development of an appropriate budget for UK aviation emissions, and ensure that this supports levelling-up.

By working to ensure aviation emissions are tackled at an international and national level, we will seek to avoid the distortions and redistribution of flights and emissions that could be the result of regional policies. We recognise that unilateral local action could distort the market, driving passengers and airlines to other airports in the UK and overseas, and undermine the role that Manchester Airport plays in Greater Manchester and the wider north.

We will encourage Government to adopt the right mix of policies, including support for technological innovation, to deliver the rapid decarbonisation of the aviation sector. If necessary, we will encourage Government to adopt demand management policies to regulate carbon emissions. The principle of equity will be key to ensure fair access to transport and an equitable distribution of the remaining global carbon budget.

We will also continue to support Manchester Airport and the industry to bring forward low carbon technologies and robust offsetting approaches – but in so doing, we will adopt a precautionary principle, to ensure that we do not overly rely on carbon offsetting or future technologies that may not deliver the reductions required. In so doing we will:

- Continue to work with the airport to ensure travel to and from the airport is as low carbon as possible, including developing improved public transport alternatives to private car travel and promotion of EV uptake through EV chargers in car parks etc
- Educate people about the carbon emissions generated by air travel and encourage passengers to offset the emissions associated with their journeys (preferably using the GM Environment Fund)

Our vision for the Bee Network, integrating transport modes across the city region, will make public transport to and from Manchester Airport more comprehensive and more comprehensible for visitors than ever before. As part of our City Region Sustainable Transport Settlement, we will continue to develop new plans to improve connectivity to the airport and spread its economic benefits more widely across the city-region.



Our ability to connect with the world is central to improving our productivity, promoting our strengths, attracting investment and talent, driving international research collaboration and increasing our export propensity. Following the pandemic, maintaining and developing our international links will be vital to the city-region's prosperity but our connections with other places will also support us to address shared challenges including climate change and inequality.

Strategic Objectives

- Continue to lobby government on the support needed to ensure a full and speedy recovery of the UK aviation sector and regional airports – emphasising the important role that airports and long-haul connectivity play in supporting the re-balancing and levelling up of the UK.
- Ensure that our policy on aviation matches our ambition to be a world leader on climate action, in line with our carbon neutral 2038 target and our carbon budget. In driving this forward Greater Manchester partners will:
 - work with Government and other stakeholders to help to influence UK aviation policy, including development of an appropriate budget for UK aviation emissions, and ensure that this supports levelling-up
 - support Manchester Airport and the industry to bring forward low carbon technologies and robust offsetting approaches – but in so doing, we will adopt a precautionary principle, to ensure that we do not overly rely on carbon offsetting or future technologies that may not deliver the reductions required
- work to ensure that travel is as low carbon as possible
- educate people about the carbon emissions generated by air travel and encourage passengers to offset the emissions associated with their journeys (preferably using the GM Environment Fund).
- Ensure that Manchester Airport is well positioned against peer airports by developing a coordinated and clear proposition for Greater Manchester and the North including its surrounding business, leisure and student travel. This would mean the city-region's route proposition remains competitive and that the Airport is able to win back and secure routes with markets such as the US, China, India and Japan;
- Work with and lobby government to accelerate investment commitments to HS2 and Northern Powerhouse Rail (NPR), improving Greater Manchester's ground connectivity to the broader Northern Powerhouse region. Better connectivity will enable Manchester Airport to increase its public transport catchment and improves the viability of new services to priority markets, to make use of existing capacity, maximises the city-region's global competitiveness and ensures the benefits of the airport flow to all parts of the North.



Digital Connectivity

In 2019, Greater Manchester published its GM Digital Blueprint outlining our ambition to be a top five European digital city-region. COVID-19 has led to digital connectivity and infrastructure being more important than ever to remain internationally competitive and drive our international ambitions.

The experience of the pandemic has led to increased acceptance and acceleration of digital adoption in our daily lives, enabling us to connect and collaborate more easily with places around the world. In the current landscape, digital platforms are a key tool in connecting us to the rest of the world – starting and strengthening relationships which can develop over time into valuable trade and people-to-people connections. Our recognised strengths in Cyber give us a unique digital offer and put us in strong footing to capitalise on these opportunities.

Looking Forward

Reliable digital connectivity is vital and given the seismic shift in working, Greater Manchester needs to have world-class digital infrastructure.

To achieve this the city-region will continue to drive investment into its digital infrastructure as outlined in the GM Digital Blueprint and recognise that post-COVID, digital connectivity, a competitive digital asset base, a workforce with the necessary digital skills as well as using digital tools in innovative new ways also play an enabling role in the delivery of our international priorities.

Digital connectivity has diminished geographical borders and enables us to collaborate more innovatively and effectively with international partners, connecting our businesses with new markets more easily, selling our assets and driving inward investment in creative new ways as well as using different digital mediums to share our international visitor offering.

Greater Manchester is committed to further exploring how we maximise our digital assets to tell our story to an international audience and deliver on all our international priority areas. By increasing our online international activity, we can amplify our voice and interests in policy making, accelerate the dissemination of information and connect with partners overseas more easily.



City-region Diplomacy

Cities are emerging from the challenges of the pandemic as new diplomatic players. Where geopolitical tensions cause friction between nations, cities and mayors can help sustain international collaboration through continued cooperation and finding practical solutions to some of today's biggest global challenges.

City-region Diplomacy is a powerful enabler for Greater Manchester's International Strategy, facilitating our engagement on the global stage on agendas that are important to us, strengthening our links with other global cities and supporting the delivery of our core international ambitions.

City-Region Diplomacy Framework

Central to our city-region diplomacy priority is the development of strategic partnerships with other international players, cities and global networks that share similar aspirations, interests, and values.

Over the last 24 months we have focused on developing partnerships that best match our needs. These partnerships and collaborations have taken on many different forms, some informal and ad-hoc others more formal, bound by Memorandum of Understanding. Examples of collaboration include Greater Manchester's engagement with Night-time Economy Advisers across the world via virtual chats, sharing insights and respective responses to the challenges facing the sector, a strong network which still remains today. More formal types of collaboration include the development of strategic partnerships with the Ruhr in Germany and the

State of Maharashtra in India, formalised by the signing of Memorandum of Understanding in 2021.

To better coordinate the delivery of our international engagement across all our core ambitions a new City-Region Diplomacy Framework has been developed covering four thematic topics:

- Economic Development Partnerships: Connecting our business support ecosystems, for example in areas of trade, investment, tourism and skills to international equivalents, helping to drive two-way opportunities.
- Innovation Partnerships and Cluster Collaboration: Leveraging international links to drive cross-border innovations and technological breakthroughs.
- City-region Exchanges, Learning and Mentoring: Working together towards a better world, working on challenges, sharing approaches economic policy and community engagement.
- Global Policy Dialogue: Raising a collective voice to influence global agendas.

At the core of the framework are the shared global challenges that are transforming Greater Manchester and other cities and regions all over the globe – climate change, the environment, inequalities, poverty, ageing, sustainable transport, clean and secure energy as well as public health.

This new approach to City-region diplomacy provides Greater Manchester and our local partners with a single Greater Manchester narrative that underpins the priorities of all our delivery organisations.



City-Region Diplomacy Framework



Existing Greater Manchester Collaborations

Germany - Ruhr Metropole (2021)	
India - Maharashtra (2021)	
Japan - Osaka (2021)	
Republic of Ireland (2021)	
France - Grand Lyon (2021)	
US - New York (2020)	
Spain - Barcelona (2019)	
South Korea - Ulsan (2019)	
Bangladesh - Sylhet (2019)	
China - Tianjin (2019)	



Role of Diplomatic Missions

Our relationship with the Consulates as well as with the Embassies in London are a crucial part of how we communicate and engage with our diaspora communities, as well as being important for developing partnerships with key players in our priority markets.

Equally as important is the UK's international network, including Embassies, Consulates General, the British Council and DIT Teams. Their extensive networks and knowledge are invaluable and they are great connectors to local partners and city officials. They actively support the delivery of Mayoral led missions and other cross-border collaborations. This is the case for a Greater Manchester City-Region Trade Pilot which is currently being developed with the Northern Powerhouse DIT Team.

Connecting Communities and People

Internationalisation should also bring positive benefits to all of our communities. Working more closely with our largest diaspora communities will continue to be a big part of our city diplomacy efforts. Greater focus will also be given to empowering, educating, and equipping our residents so they can thrive in a global economy.

Over the years many of our local authorities have developed relationships with other local authorities and institutions around the world, particularly with Europe via funded programmes such as Interreg, Urbact or IURC. As access to these programmes is now limited for UK cities, we are committed to supporting our local authorities maintain and build new international partnerships to encourage collaboration. We will leverage our relationship with the British Diplomatic Missions Overseas and the

wider global networks we participate in such as the European Metropolitan Authorities.

Solidarity Beyond our Borders

Less developed countries face a different set of challenges which have been exacerbated by global inequalities and the economic downturns caused by the pandemic.

Greater Manchester and Sylhet

Greater Manchester has a large Bangladeshi community and in recent years has been working with the Deputy Leader of Oldham Council to build on its relationship with Sylhet. In 2020 a Greater Manchester Bangladesh Partnership was formed and the group has been working in partnership with the Foreign Commonwealth and Development Office to provide Sylhet with mentoring strategic support to help them develop their first waste and resource management strategy for the city. An important step in helping them to achieve net zero by 2050.

Greater Manchester's Strategic Partnership with the Ruhr Metropolis

In summer 2021 Greater Manchester and the Ruhr entered into a strategic partnership agreement. Under this agreement we will work to deepen cooperation and share best practice in areas including climate change and sustainability, digitalisation, and cyber security; innovation and research; and regional devolution.

In addition to strengthening business and trade links, Greater Manchester and the Ruhr will also work to strengthen civic, cultural and educational connections, including youth exchanges.



Greater Manchester recognises the role we must play in helping to reduce global inequalities and building solidarity beyond our borders, particularly in countries where we have a strong and shared history.

City-region diplomacy also presents an opportunity for Greater Manchester to engage internationally on global debates, which are aligned to our policy ambitions. Greater Manchester is at the forefront of the green revolution; our 2038 carbon neutral target is a decade ahead of UK government and our city-region's Five-Year Environmental Plan shows our commitment to delivering on our ambitious targets. The climate crisis is a global emergency and an example of a key policy area where Greater Manchester is well placed to play a role in addressing the crisis, sharing our knowledge, technology, innovative policy and experiences, working with and learning from others to address the challenges of climate change.

Strategic Priorities

- Delivering and broadening existing city-region collaboration agreements identifying opportunities that promote further trade, investment and research collaboration between businesses and institutions.
- Develop a City-Region Diplomacy Plan which identifies a small and strategic number of city relations and cluster partnerships that align with Greater Manchester's sector opportunities, policy interest and priority markets.

- Delivery of the 2022-23 Mayoral Mission Plan in partnership with key Greater Manchester stakeholders and government to support the delivery of our international ambitions and raise our profile overseas.
- Explore opportunities emerging from the 10 districts that may benefit from city-to-city international partnerships and missions, for example, investment, trade and diaspora links.
- Promote Greater Manchester as an active and strong voice in global issues on the international stage, map our international networks and identify opportunities for joint international working across the city-region.
- Strengthen our relationships and engagement with British and foreign diplomatic missions.





RS

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GLOBAL TARGET MARKETS

In 2017, Greater Manchester completed a full evaluation of our global target markets based on existing strength, economic size, forecast growth and ease of doing business, with the aim of identifying the city-region's priority markets. A similar analysis was completed in summer 2021 with findings confirming that Europe and the US continue to be our largest and most significant markets across our international priority areas. In recent years we have also seen significant growth in markets such as China and India, thanks partly to the establishment of the Manchester China Forum and the Manchester India Partnership as well as an increasingly stronger relationship with markets such as GCC, Australia, South Korea and Canada.

Greater Manchester's Strongest Economic Relationships

Greater Manchester has relationships with countries from all parts of the world. These can be based on cultural ties, historic migration and diplomatic links. That wide range of relationships will continue to grow and deepen, but assessment is also needed of the strongest economic links across the city region which often reinforce (and are reinforced by) those wider relationships.

The table overleaf summarises the city-region's top international markets based on our **historical performance** in trade, investment, international student recruitment, academic research, visitor numbers and value over the last four years. A more detailed analysis of Greater Manchester's international relationships can be found in Appendix A.



Table 9. Greater Manchester’s strongest international relationships across core priority areas (2017 to 2021)

Country	Export Activity	Investment Activity	International Students	Academic Research	Tourism
USA	High	High	Medium	Medium	High
Germany	High	High	Medium	Medium	High
France	High	Medium	Medium	Medium	Medium
China	Medium	Medium	High		High
Spain	Medium	Medium	Medium	Medium	Medium
Italy	Medium		Medium	High	Medium
Ireland	High	Medium	Medium	Medium	High
India		High	High	Medium	Medium
Netherlands	High	Medium	Low	Medium	Medium
Australia				Low	
South Korea	Medium		Medium		
Canada	Low	Medium	Low		
Japan		Low			
Malaysia		Low	High	Medium	
Poland	Medium		Low	Low	
Switzerland		Medium		Low	Medium
Turkey	Medium	Medium	Low		
Mexico					
Indonesia			Low	Low	
Singapore			Low		
New Zealand	Low	Low			
United Arab Emirates	Medium	Low	Medium		
Brazil		Low		Low	
Saudi Arabia	Low		High		
Nigeria			Medium		

Relative strength of relationship
High
Medium
Low



Europe, (primarily Germany, Ireland, France, the Netherlands and Spain) the US and China have remained some of Greater Manchester's closest international partners with a total trade value of over £4.7bn in 2019. At present, some of our strongest markets have a consular or trade office presence in Greater Manchester, actively engaging and working with local partners for mutual benefit.

Market Vehicles

The significant growth of Greater Manchester's relationship with China and India can be attributed to the long-term, coordinated approach the city-region has taken to developing and delivering international engagement. The Manchester China Forum (MCF) formed in 2013 and the Manchester India Partnership (MIP) in 2018, bring together the public and private sector to create a strong platform for Greater Manchester to capitalise on China and India's future growth opportunities to support the delivery of our international ambitions and economic development in the region. These special purpose vehicles have received acclaim from national government, policy makers and international partners as a highly innovative approach to driving international engagement at a city level with this model now being replicated across other regions of the UK.

Greater Manchester recognises the importance of Japan as a priority market to the UK. In response to this as well as an increase in trade and investment levels between Greater Manchester and Japan, in 2021 the city-region formed a Greater Manchester-Japan Steering Group. This steering group brings together a diverse network of business leaders from across academia as well as both the private and public sector. The group has been tasked with developing and

delivering a coordinated approach to our work with Japan, recognising the significant trade, investment and research opportunities.

In the same year, Greater Manchester established a Bangladesh Partnership Board which was set up to drive forward our international and people-to-people connections with Bangladesh, one of our largest diaspora communities.

Looking Forward

Three critical factors inform our priority markets for the next three years:

- Greater Manchester's strongest markets and existing relationships.
- New national foreign policy.
- Identified opportunity areas based on global trends.

Traditionally Greater Manchester's priority market selection has been centred on an evidence-based approach that analyses key markets which present the strongest strategic alignment and growth opportunities. The pandemic has necessitated a reset on how the world lives, works and engages, with international policy makers anticipating an acceleration of economic power to the East. There remains a huge amount of uncertainty and anticipated change, and we cannot only rely wholly on past data to predict future opportunities. As clarity emerges, we must monitor the global implications of the pandemic and our new relations with the EU on our global target markets, coordinating efforts across Greater Manchester to ensure our international strategy responds accordingly.



Over the years, Greater Manchester has developed strong partnerships across the world and now boasts a robust network of both city-led and national relationships with Europe, India, China and the United States. Given the huge amount of uncertainty at present, we believe our immediate economic interests are best served further strengthening, developing our strongest existing links and ensuring the sustainability of these partnerships.

However, based on historical performance, new national trade policy and emerging trends, Greater Manchester will also continue exploring further opportunities with our identified growth markets including Canada, Australia, Japan, GCC and South Korea, working across these priority markets to promote trade, investment and research partnerships that bring benefits to our partners, businesses and communities.

In the longer term, Greater Manchester recognises that the global landscape is shifting due to many economic, political, technological, and environmental risks and uncertainties which will impact global trade. We must continue to monitor long-term trends and identify further market opportunities outside of our developed and recognised growth markets.

According to the Department for International Trade's Global Trade Outlook report published in 2021, emerging economies are likely to account for a growing share of trade by 2050 as their GDP continues to increase and they become more integrated into global value chains. The largest emerging economies to watch include China, India, Brazil, Russia, Indonesia, Mexico and Turkey due to their growing weight in the global economy. Countries such as Vietnam and

Philippines are expected to rise up the global import rankings presenting significant opportunities for Greater Manchester's exporters by 2050.

The below table summarises where Greater Manchester believes there are opportunities over the next three-years against our core economic priorities. These markets have been split in to three categories: Priority, Growth and Monitor.

Priority markets are places where we have strong existing connections and believe there are further opportunities. Growth markets are countries where we believe there is an opportunity for closer links based on emerging trends and new government policy. Monitor markets are places where we believe present long-term opportunities for the city-region.

Due to limited international resources, we will be unable to proactively engage with all the markets outlined below. We are however not closed off to any opportunities and will support wider international engagement should there be a clear benefit for the delivery of the priorities and objectives laid out in Greater Manchester's International Strategy.



Table 10. Greater Manchester’s identified future market opportunities (Priority, Growth and Monitor)

Country	Export	FDI	FCI	Research and Innovation	Visitor Economy (Volume and Value)	International Students
Australia	Growth	Priority		Growth	Growth	
Bangladesh	Monitor					Growth
Belgium	Priority					
Brazil	Monitor			Monitor		Growth
Canada	Growth	Priority	Growth	Priority		
China	Priority	Priority	Monitor	Growth	Priority	Priority
Denmark	Growth				Growth	
Estonia		Monitor				
France	Priority	Priority		Priority		
Germany	Priority	Priority	Priority	Priority	Priority	
Hong Kong	Growth		Priority			Growth
India	Growth	Priority	Monitor	Priority	Priority	Priority
Indonesia	Growth			Monitor		Priority
Ireland	Priority	Priority		Priority	Priority	
Israel		Monitor		Priority		
Italy	Priority	Priority		Priority		
Japan	Growth	Growth	Priority	Growth	Monitor	
Malaysia	Monitor					Priority
Mexico	Monitor					
New Zealand	Monitor				Growth	
Netherlands	Priority	Priority		Priority	Growth	
Norway						

Key
Priority
Growth
Monitor



Country	Export	FDI	FCI	Research and Innovation	Visitor Economy (Volume and Value)	International Students
Nigeria	Yellow	White	White	White	White	Orange
Pakistan	Yellow	White	White	White	White	Orange
Poland	Teal	White	White	Yellow	White	White
Singapore	White	Yellow	Yellow	White	White	White
South Korea	Orange	Yellow	White	Orange	White	White
Spain	Teal	Teal	White	Teal	Teal	White
Sweden	Teal	Teal	White	Teal	Orange	White
Switzerland	White	Teal	White	Orange	White	White
Turkey	Orange	White	White	White	White	White
United Arab Emirates/GCC	White	White	Teal	White	Teal	Teal
United States of America	Teal	Teal	Teal	Teal	Teal	Orange
Vietnam	Orange	White	White	White	White	Orange



Appendix A. Global Market Analysis – Strength of Relationship

Country	GDP (2)	Export Activity (1)	Investment Activity (1)	International Students (1)	Academic Research (1)	Tourism (2)	Ease of Doing Business (1)	Trade Negotiations (1)	Total
USA	High (2)	High (1)	High (1)	Medium (0.5)	Medium (0.5)	High (2)	High (1)	High (1)	8
Germany	High (2)	High (1)	High (1)	Medium (0.5)	Medium (0.5)	High (1.5)	High (1)	High (1)	8
France	High (2)	High (1)	Medium (0.5)	Medium (0.5)	Medium (0.5)	Medium (0.75)	High (1)	High (1)	7
China	High (2)	Medium (0.5)	Medium (0.5)	High (1)		High (1.5)	High (1)		6.5
Spain	High (2)	Medium (0.5)	Medium (0.5)	Medium (0.5)	Medium / Low (0.375)	Medium (1.5)	High (1)	High (1)	6.375
Italy	High (2)	Medium (0.5)	Low (0.25)	Medium (0.5)	High / Medium (0.625)		Medium (0.5)	High (1)	5.875
Ireland	Medium (1)	High (1)	Medium (0.5)	Medium (0.5)	Medium / Low (0.375)	High (1.5)	High (1)	High (1)	5.875
India	High (2)	Low (0.25)	High (1)	High (1)	Medium (0.5)	Medium (0.75)	Medium (0.5)	Medium (0.5)	5.75
Netherlands	Medium (1)	High (1)	Medium (0.5)	Low (0.25)	Medium / Low (0.375)	Medium (0.75)	High (1)	High (1)	5.625
Australia	High (2)	Low (0.25)	Low (0.25)		Low (0.125)	Medium (0.75)	High (1)	High (1)	4.875
South Korea	High (2)	Medium (0.5)	Low (0.25)	Medium (0.5)			High (1)		4.75



Country	GDP (2)	Export Activity (1)	Investment Activity (1)	International Students (1)	Academic Research (1)	Tourism (2)	Ease of Doing Business (1)	Trade Negotiations (1)	Total
Canada	High (2)		Medium (0.5)	Low (0.25)			High (1)	Medium (0.5)	4.5
Japan	High (2)		Low (0.25)				High (1)	High (1)	4.25
Malaysia	Medium (1)		Low (0.25)	High (1)	Medium (0.5)		High (1)	Medium (0.5)	4.25
Poland	Medium (1)	Medium (0.5)		Low (0.25)	Low (0.125)	Medium (0.75)	High (1)	High (1)	3.875
Switzerland	Medium (1)		Medium (0.5)		Low (0.25)		High (1)	Medium (0.5)	3.75
Turkey	Medium (1)	Medium (0.5)	Medium (0.5)	Low (0.25)			High (1)		3.25
Mexico	High (2)						Medium (0.5)	Medium (0.5)	3
Indonesia	High (2)			Low (0.25)	Low (0.125)		Medium (0.5)		2.875
Singapore	Medium (1)			Low (0.25)			High (1)	Medium (0.5)	2.75
New Zealand	Low (0.5)	Low (0.25)	Low (0.25)				High (1)	High (1)	2.75
United Arab Emirates	Medium (1)	Medium (0.5)	Low (0.25)	Medium (0.5)			High (1)		2.75
Brazil	High (2)		Low (0.25)		Low (0.125)		Low (0.25)		2.625
Saudi Arabia	Medium (1)			High (1)			Medium (0.5)		2.5
Nigeria	Medium (1)			Medium (0.5)			Low (0.25)		1.75



Appendix B. List of Foreign Diplomatic Missions and Honorary Consuls in Greater Manchester

Country	Representative
Austria	Honorary Consul
Bangladesh	Assistant High Commission
Belgium	Honorary Consul
Brazil	Honorary Consul
China	Consulate General
Czech Republic	Consulate General
Denmark	Honorary Consul
Finland	Honorary Consul
France	Honorary Consul
Hungary	Consulate General
Iceland	Honorary Consul
Iraq	Consulate General
Ireland	Consulate General
Italy	Consul
Japan	Honorary Consul
Libya	Consulate General
Mexico	Honorary Consul
The Netherlands	International Trading Office
Norway	Honorary Consul
Pakistan	Consulate General
Poland	Consulate General
Portugal	Consulate General
Romania	Consulate General
Spain	Consulate General
Sweden	Honorary Consul
Switzerland	Honorary Consul
Turkey	Consulate General

Appendix C. Strategy Partners

Local Government

Bolton Council
 Bury Council
 Greater Manchester Combined Authority
 Manchester City Council
 Oldham Council
 Rochdale Council
 Salford City Council
 Stockport Council
 Tameside Council
 Trafford Council
 Wigan Council

National Government

British Council
 Department for Business, Energy & Industrial Strategy
 Department for International Trade
 Foreign, Commonwealth and Development Office

Local Delivery Partners

The Growth Company, including, Marketing Manchester, MIDAS, MCF, MIP, NW Trade Service and Business Growth Hub
 Greater Manchester Chamber of Commerce
 Local Authorities

Market Boards and Steering Groups

International Marketing and Advisory Board
 GMCA German Advisor
 Greater Manchester-Japan Steering Group
 Bangladesh Partnership Board



Private Sector

Greater Manchester Local Enterprise Partnership

Universities

The University of Bolton
The University of Manchester
Manchester Metropolitan University
The University of Salford

Other Key Stakeholders





Foreign Embassies and Consulates
Global Networks
Manchester Airport
Greater Manchester Sport and Culture Partners
Global Partner Cities and Regions






Appendix D. Evidence Base

Details of the Greater Manchester Independent Prosperity Review are available here: <https://www.greatermanchester-ca.gov.uk/news/independent-prosperity-review/>
Details of the Manchester Independent Economic Review are available here: <http://manchester-review.co.uk/>
Details of the Greater Manchester Local Industrial Strategy are available here: <https://www.greatermanchester-ca.gov.uk/media/2132/gm-local-industrial-strategy-web.pdf>
Details of the Greater Manchester Audit of Productivity are available here: https://www.greatermanchester-ca.gov.uk/media/1911/gmipr_tr_auditofproductivity.pdf



Appendix E. Global Network Connections

	<p>Eurocities is a network of large cities in Europe, established to further economic, political and social development in its member cities.</p>
	<p>EMA is an initiative creating spaces for political debate among European metropolitan authorities aimed at sharing experiences, fostering joint projects as well as positioning themselves and defending their interests in front of the European Union and states.</p>
	<p>The Covenant on Demographic Change gathers European public authorities, at local, regional and national level, and other relevant stakeholders, committed to develop environments that support active and healthy ageing, enhance independent living and well-being of older persons, and create a society for all ages.</p>
	<p>The Global Covenant of Mayors for Climate & Energy is an international coalition of cities and local governments with a shared long-term vision.</p>
	<p>100 Resilient Cities, pioneered by the Rockefeller Foundation, was dedicated to helping cities around the world become more resilient to the physical, social and economic challenges of the 21st century. The initiative came to an end in 2019 but two new organisations has emerged from 100 Resilient Cities - Resilient Cities Catalyst and Global Resilient Cities Network.</p>
	<p>The Under2 Coalition is a global community of state and regional governments committed to ambitious climate change targets.</p>

	<p>EIP AHA Reference Sites are regions, cities, integrated hospitals or care organisations and their quadruple helix partners from industry, civil society, academia and government authorities that focus on a comprehensive, innovation-based approach to active and healthy ageing. Greater Manchester is currently a 4 star Reference Site.</p>
	<p>The WHO Global Network for Age-friendly Cities and Communities was established in 2010 to connect cities, communities and organizations worldwide with the common vision of making their community a great place to grow old in.</p>
	<p>The United Nations Making Cities Resilient Campaign addresses issues of local governance and urban risk. Greater Manchester's ten districts became role models of the Campaign in 2014.</p>
	<p>The One Planet City Challenge is WWF's biennial global challenge that recognizes cities for their ambitions and innovative actions in sectors such as energy, buildings, transport, and waste, to power the global transition to a low-carbon, climate-resilient future.</p>
	<p>The Milan Urban Food Policy Pact is a global commitment of mayors from around the world that considers food as an entry point for the sustainable development of growing cities.</p>



Appendix F. Greater Manchester Twinning

Country	City/Town	Nature of relationship	GM Local Authority
France	Le Mans	Twinning	Bolton
Germany	Paderborn	Twinning	Bolton
China	Datong	Twinning	Bury
France	Tuile	Twinning	Bury
France	Angoulême	Twinning	Bury
Germany	Schorndorf	Twinning	Bury
United States	Woodbury, New Jersey	Twinning	Bury
China	Wuhan	Sister City	Manchester
Germany	Chemnitz	Sister City	Manchester
Denmark	Aalborg and Aarhus	MoU on culture	Manchester
China	Haidian District, Beijing	Friendship agreement	Manchester
Japan	Kagoshima	Friendship agreement	Manchester
South Korea	Gumi City	Friendship agreement	Manchester
United States	Los Angeles	Friendship agreement	Manchester
Pakistan	Faisalabad	Friendship agreement	Manchester
Spain	Córdoba	Friendship agreement	Manchester
Israel	Rehovot	Friendship agreement	Manchester

Country	City/Town	Nature of relationship	GM Local Authority
Germany	Landsberg	Twinning	Oldham
Slovenia	Kranj	Twinning	Oldham
Germany	Geesthacht	Twinning	Oldham
France	Tourcoing	Twinning	Rochdale
Germany	Bielefeld	Twinning	Rochdale
Pakistan	Sahiwal	Twinning	Rochdale
Ukraine	Lviv	Twinning	Rochdale
Germany	Peine	Twinning	Rochdale
France	Narbonne	Twinning	Salford
France	Clermont-Ferrand	Twinning	Salford
France	Saint-Ouen	Twinning	Salford
Germany	Lünen	Twinning	Salford
France	Béziers	Twinning	Stockport
Germany	Heilbronn	Twinning	Stockport
China	Bengbu	Twinning	Tameside
France	Armentières	Twinning	Tameside
France	Colmar	Twinning	Tameside
France	Champagnole	Twinning	Tameside
France	Chaumont	Twinning	Tameside
France	Hem	Twinning	Tameside
France	Montigny-le-Bretonneux	Twinning	Tameside
France	Villemomble	Twinning	Tameside



Country	City/Town	Nature of relationship	GM Local Authority
Germany	Kierspe	Twinning	Tameside
Germany	Ruppichteroth	Twinning	Tameside
France	Angers	Twinning	Wigan
Spain	Barcelona	Partnership Agreement	GMCA
China	Tianjin	MoU - Partnership agreement	GMCA
China	Shenzhen	MoU - Partnership agreement specifically on smart cities	GMCA
China	Hubei Province	MoU – Collaboration agreement	GMCA
Bangladesh	Sylhet	MoU - Partnership agreement	GMCA
India	Bangalore	MoU - Partnership agreement	GMCA
Korea	Ulsan	MoU - Partnership agreement	GMCA
Germany	Ruhr Metropolis	MoU – Partnership Agreement	GMCA
India	Maharashtra	MoU – Partnership Agreement	GMCA



Appendix G. Glossary

BBC	British Broadcasting Corporation
bn	billion
CPTPP	Comprehensive and Progressive Agreement for Trans-Pacific Partnership
DCMS	Department for Digital, Culture, Media and Sport
DIT	Department of International Trade
EU	European Union
EV	Electric Vehicle
FCDO	Foreign, Commonwealth & Development Office
FCI	Foreign Capital Investment
FDI	Foreign Direct Investment
FTA	Foreign Trade Agreement
GCC	Gulf Cooperation Council
GCHQ	Government Communications Head Quarters
GDP	Gross Domestic Product
GM	Greater Manchester
GMCA	Greater Manchester Combined Authority
GMCC	Greater Manchester Chamber of Commerce
HE	Higher Education

HQ	Head quarters
HS2	High speed 2 (rail)
IMAB	Internationalisation and Marketing Board
IPS	International Passenger Survey
m	million
MCF	Manchester China Forum
MDC	Mayoral Development Corporation
MIP	Manchester India Partnership
NHS	National Health Service
NPR	Northern Powerhouse Rail
NW	North West
R&D	Research & Development
SMEs	Small and Medium Enterprises
THL	Tourism, Hospitality and Leisure
UK	United Kingdom
UKRI	UK Research and Innovation
UUKi	Universities UK International
UN	United Nations
VCSE	Voluntary, Community and Social Enterprise



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