



GREATER MANCHESTER BUSINESS BOARD (LEP)

DATE: Wednesday, 19 July 2023
TIME: 4.00 - 6.00pm
PLACE: GMCA Boardroom, Churchgate House, M1 6EU

AGENDA

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Lou Cordwell / Clive Memmott

MEDIUM TERM PRIORITIES

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| | vi. GC Business Support Advisory Board | Vanda Murray |
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- | | | |
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DECLARATIONS OF INTEREST

19 July 2023

(To be completed as necessary by all board members and advisors)

Name:

Minute Ref / Item No	Nature of Interest

COMPLETE THIS FORM IF YOU HAVE AN INTEREST IN ANY PARTICULAR ITEM ON THIS AGENDA (SEE GUIDANCE OVERLEAF).

ANY COMPLETED FORMS SHOULD THEN BE HANDED IN TO LEE TEASDALE AT THE START OF THE MEETING

GUIDANCE ON DECLARATION OF INTERESTS (AS PER DRAFT TERMS OF REFERENCE)

1. Subject to point 3) below, members (and advisors) must declare any interests (on the form provided), either at the **start of the meeting or as soon as any potential interest in an agenda item becomes apparent** during the course of the meeting.
2. Members must declare their interest when the business being discussed specifically relates to
 - Their business
 - Any body of which they are a member
 - Any person or body who:-
 - Employs them
 - Makes payments to them
 - Has a contractual relationship with them
 - Any land or property in which they have an interest

This also applies to any close member of their family or person with whom they have a close relationship.

3. For the purposes of the above:
 - An interest of which a member has no knowledge and of which it is unreasonable to expect him or her to have knowledge shall not be treated as an interest of his or hers.
 - In relation to a non-pecuniary interest, a general notice given to the LEP that a member is to be regarded as having an interest, of the nature and the extent specified in the notice, in any transaction or arrangement in which a specified person or class of persons is interested shall be deemed to be a disclosure that the member has an interest in and such transaction of the nature and extent so specified.
4. Members (and advisors) with a declared interest in an item of business would usually be required to leave the room. **BUT** the board may want such an individual to contribute their knowledge and experience to the discussion despite the interest so declared. If this is the case the affected member can remain in the room - functioning as a resource that can be drawn upon to assist the board in their deliberations. The affected member should then withdraw when the decision on the matter is being taken and must withdraw at the decision-making stage if the member has a pecuniary interest unless otherwise determined by the Chair of the meeting. In the absence of the Chair or where an item of business relates to the Chair or an interest of the Chair, the meeting shall be chaired by a nominated Vice Chair if there is any or by a member selected by the meeting for that purpose.



MINUTES OF MEETINGS OF THE GREATER MANCHESTER BUSINESS BOARD (LEP)

The Greater Manchester Business Board (LEP) last held a public meeting in January 2023.

However, the Board was unable to meet formally in public until May 2022 and held regular meetings to ensure they remained informed of the latest developments and could help drive the recovery of the city region.

The Board met in March and May 2023 where a small number of emergency decisions were taken using the written procedure protocol as set out in the Terms of Reference where appropriate.

March 2023

The Board agreed:

1. That Lou Cordwell was confirmed as Chair of the GM Business Board at the completion of the three year term
2. That the £250k 2023/24 Capacity Funding was approved including:
 - I. Delivery of GM Business Board (LEP) Priorities and Strengthened Capacity - £135k
 - II. Promoting Greater Manchester's Economic Vision and Assets - £75k
 - III. LEP Oversight and Governance - £40k

MINUTES FROM THE GREATER MANCHESTER BUSINESS BOARD ANNUAL GENERAL MEETING HELD AT 16:00 ON WEDNESDAY 18 JANUARY 2023 IN THE BOARDROOM, GMCA OFFICES, TOOTAL BUILDINGS, 56 OXFORD STREET, MANCHESTER

Board Members:

Lou Cordwell (In the Chair)

Mike Blackburn, Mayor Andy Burnham, Marilyn Comrie, Steve Connor, Cllr Bev Craig, Lorna Fitzsimons, Justin Kelly, Clive Memmott, Chris Oglesby & Miles Rothbury.

Advisors:

David Rogerson (GMCA), Lee Teasdale (GMCA), Simon Nokes (GMCA), John Wrathmell (GMCA), Mark Hughes (The Growth Company), Oscar Lynch (GMCA), Diane Modahl (GMCA), Chris Barnes (TfGM), Ross Beard (TfGM) & Simon Elliott (TfGM).

Attending via Hybrid Link:

Cllr Amanda Chadderton (LEP Member), Cllr Eamonn O'Brien (LEP Member), Eamonn Boylan (GMCA), Joanne Roney (Manchester City Council), Sheona Southern (Marketing Manchester), Louise Latham (Marketing Manchester) & Mark Atherton (GMCA).

GMBB/23/01 WELCOME, APOLOGIES & INTRODUCTIONS

The Chair welcomed all present to the first meeting of the Board following its restructure as the GM Business Board (LEP).

Apologies were received from GM Business Board (LEP) Members Amanda Halford, Vimla Appadoo & Vanda Murray. Apologies were also received from Tom Stannard (Salford), Steve Wilson (GMCA) & Rhys Whalley (MIDAS).

The Chair advised all present that Amanda Halford would be stepping down as a member of the Board due to increased work commitments. However, Amanda remained fully committed to support the health innovation agenda within GM and would look to attend relevant working groups where time allowed. Members recorded their thanks to Amanda for her fantastic support during her tenure on the Board.

GMBB/23/02 DECLARATIONS OF INTEREST

There were none.

GMBB/23/03

MINUTES OF MEETING OF 15 NOVEMBER 2021

Ratification was required for the minutes of a meeting held on 15 November 2021 along with a small number of emergency decisions made using the written procedure protocol when the Board could not meet in public due to ongoing challenges resulting from the Covid pandemic

RESOLVED:/

1. That the Board agrees the minutes of 15th November 2021 as a true and correct record of the meeting and ratifies the emergency decisions.

GMBB/23/04

BOARD MEMBERSHIP UPDATE

Simon Nokes was invited to provide an update on the refresh of the Board.

The Chair together with officers was looking at how best to fill current gaps in membership in terms of sectoral gaps – looking at large companies, SMEs and areas of specific interest. A mapping exercise was being undertaken before going out to the market to fill these gaps. The plan was to recruit up to four new members.

Members asked that the specific areas being sought be shared with them, so that they could use their contacts in aiding the mapping exercise.

RESOLVED:/

1. That the Board Membership Update be received.
2. That information about the sectoral gaps that needed to be filled be shared with Board Members.

GMBB/23/05

QUESTIONS FROM THE FLOOR

There were none.

CURRENT ECONOMIC CHALLENGES

GMBB/23/06

ECONOMIC INTELLIGENCE AND BUSINESS ANALYSIS

National Train Network Issues

The Chair agreed that, given how much the issue was impacting upon business in the region – that the section would open with an additional discussion of train network issues, particularly those on the Arriva Trains network. TfGM officers were invited to provide the latest update. Points highlighted included:

- Current challenges included the December 2022 timetable change, predicated on issues raised over the last few years. Following the disastrous timetable changes of 2018, the industry had put a mechanism in place to look at installing a reliable and high-performing timetable. This had led to increased services for some areas. However, there in turn had been difficulties with reduced connectivity from certain areas to the airport.
- Due to driver availability and training issues – Avanti Trains over the summer had reduced the number of trains between Manchester and London Euston from 3 trains per hour to just 1. This had now been stepped back up to 3 from December.
- Industrial relations continued to impact the ability to truly monitor Avanti Trains ability to meet their commitments. However, there had been a post-Christmas period without strikes – this provided a week and a half window to assess where Avanti, Transpennine and Northern stood in early 2023 in terms of performance. The results had shown some improvement in performance, though not a significant improvement. Avanti still clearly had some staffing challenges.
- It was requested that businesses in the region provide TfGM with any data they had collated to show the detrimental impacts upon their bottom line that had correlated with the train issues to aid in the development of an assessment of how much the transport failings were impacting the region.
- Members noted a claim that Avanti’s timetable was based on no ‘rest day working’ and that this was presumably a statement of intent rather than the reality. It was confirmed that this must be the case as driver training programmes took upwards of six months. TfGM would liaise with Avanti to ensure that they do not require reliance on rest day working at the present moment.
- Members expressed significant concern about the economic impact upon the Greater Manchester region – with drops in economic activity in Manchester during the Christmas period reflecting the public’s concerns about being able to get to and from Manchester via train.
- Members noted that the sustained length of the problems were now impacting upon longer-term business confidence in investing in the North. This was a huge worry and showed how fragile the situation was in terms of inward investment. Members were provided with an example of being asked to hold business seminars for international clients in Manchester but having to turn them down due to the lack of confidence in them being able to travel by train. This was hugely embarrassing for the region.
- Concerns around the impact on net zero ambitions were also highlighted. As people lost confidence in trains they increasingly turned back to

personal vehicles. There needed to be proof of a consistent reliable service to attract these people back to public transport.

- It will be important to keep engaging with Government to emphasise how much this issue was strangling the local economy. This needs to be a broad package of comments that did not just refer to concerns over one specific franchise holder.

Action – The Business Board (LEP) to explore with TfGM how to best highlight the ongoing economic impact of rail network issues with Government.

Government Policy Update

- Active conversations were ongoing with government on devolution deals. Gradual feedback was coming out from government, but crucial information remained outstanding around housing/housing quality; transport; skills/work programmes; and single pots of funding arrangements.
- It was hoped that the Trailblazer deal would be signed by February.
- Conversations remained ongoing about revisions to Investment Zone plans. Whilst the Government had withdrawn the original plans, it was advised they would look again as this initiative.
- Shared Prosperity Funding was now flowing into the region following agreement of GM's proposals.
- The Convention of the North would be taking place at Manchester Central on Wednesday 25th January. Almost 1000 people were currently signed up to attend, with a number of notable guest speakers in place to discuss the Levelling Up agenda.

Cost of Living & Economic Resilience

- Previous conversations had questioned whether GM may be reaching a tipping point in the labour market following surprisingly strong levels of performance in 2022. Data now received indicated that GM was 'still on the cusp' with unemployment marginally falling and employment marginally rising, but universal credit claims also raising slightly.
- With the labour market remaining relatively strong and pay having risen on average by 6.4% nationally – this pointed towards the Bank of England likely to continue in raising interest rates for now.
- A slight increase nationally had been seen in the CPI. Inflation had fallen by 0.2%

- Members expressed concern that the dashboard did not fully reflect the ‘reality’ of what was happening. It was queried whether other metrics could be added that would aid wider conversations – such as information pertaining the number of rail journeys happening monthly within GM; or information from the three national credit agencies on how much less disposable income GM residents now had access to.
- Members referenced the drop in inflation but noted this did not reflect the reality of the most impactful areas of inflation – such as the huge amounts being seen in terms of food.
- It was agreed that to avoid a data overload – there needed to be discussion and agreement on the data that would be of most consequence to the Business Board (LEP) as a group.

Action – Officers will explore what additional data could be added to the dashboard.

Action – Officers to share the latest GMCA Cost of Living Dashboard with the Board

RESOLVED:/

1. That the updates and actions above be noted.

LONG TERM ECONOMIC CHALLENGES

GMBB/23/07 ADDRESSING INEQUALITIES

Note: with agreement from the Board – the Chair re-arranged the agenda order so that Item 11(i) – GM Civic Leadership Programme, was taken as the next item at the meeting.

GM Civic Leadership Programme

The Chair invited Diane Modahl, the Chair of the Civic Leadership Programme Steering Group to provide an update to the Board on the inaugural Greater Manchester Civic Leadership Programme, commissioned by the GMCA and delivered by Operation Black Vote. The report highlighted how the programme would be strengthened in year two, and opportunities for the GM Business Board (LEP) to support delivery to maximise impact. Key points highlighted included:

- The Civic Leadership Programme was a key part of Greater Manchester’s aspiration to reduce inequalities and maximise opportunity.

- The key focus of the Programme was to help young black and racially minoritised people to realise their leadership aspirations. The GM Independent Inequalities Commission had found in the course of its research that GM’s ability to get to grips with racial inequality issues was hampered by the lack of representation in leadership positions within the organisations that would have the power to act.
- 28 individuals had been recruited from across all of GM’s ten boroughs with an objective to be upskilled, be mentored by individuals who had reached senior leadership positions and wherever possible ‘de-layer’ the journey.
- Diane’s role as the Chair of the Programme was to engage with boards and leaders such as this one to encourage further collaboration with the programme – such as work experience days, providing talks to incoming cohorts and even possibilities around apprenticeship opportunities.
- Members emphasised the importance of sustainability following the initial flurry of activity in response to a programme. This needed to be a concerted effort properly monitored and working towards long term shifts with lasting impacts.
- The Board would consider how best to its engagement with the programme to provide continued support and business contacts.
- Members gave consideration to the evolving of the programme towards become a ‘civic and business leadership programme’ as it developed.

RESOLVED:/

1. That the Board notes the Programme’s first year outputs, outcomes and case studies.
2. That Board Members be asked to give further consideration to how they could support this year’s participants, and next year’s programme delivery and participants.

KEY GMS DELIVERABLES

GMBB/23/08	BOARD	MEMBER	FEEDBACK	ON
	DELIVERY/AFFILIATED GROUPS			

Digital

The Chair advised that the digital portfolio remained unallocated at the present time but would be resolved shortly as part of the Board refresh.

Real Living Wage Campaign

This continued to be a key focus for the city region – there had never been a greater need to have this conversation which has developed to take account of current challenges faced by business. Overall, the progress seen indicated that the campaign continued to be a success.

Skills

The biggest success in the last few weeks had been the confirmation that the Greater Manchester Institute of Technology had secured a licence and would open in September 2023.

It was hoped that the Institute would sit at the heart of a new innovative approach to the skills agenda. Lobbying continued to take place around devolution in this area – with an aim to create the country’s first integrated technical education system.

Innovation Greater Manchester (IGM)

The Innovation Accelerator is assessing the projects to be funded and wider consultation was taking place with stakeholders on the future of IGM with a focus upon how the innovation ecosystem would be developed across the city region.

Economic Resilience Group/GM BROs

The next meeting would be taking place next week – and would include a strong focus upon the impacts of the current travel challenges.

GC International and Marketing Advisory Board

SXSW and MIPIM were key upcoming international events to help showcase Greater Manchester on the world stage.

Investment Finance/Investment Portal

It was agreed that ‘access to finance’ was the biggest issue facing potential SMEs in the region and so a significant amount of work was being placed into signposting towards potential business support and funding. This could appear as a complex area and the plan was to demystify this and provide a platform that would signpost in clear English how to do this. The launch was planned for Summer 2023.

Bee Network Partnership Board

Business has a key role to play when the Bee Network went live to ensure that it can succeed and benefit all the people of Greater Manchester.

RESOLVED: /

1. That the board member feedback received be noted.

2. That the Board welcomed the progress of the Investment Portal and noted that a future funding source would need to be found to sustain the Portal if it proved successful.

It was agreed by the Chair that the Deep Dive items on Bee Net Zero and Digital Blueprint, plus the Time to Change report would be brought to the next meeting of the Board to allow sufficient time to dedicate to them.

GMBB/23/09 LOCAL GROWTH FUND UPDATE

A report was provided report that updated the Board on progress to deliver key elements of the Local Growth Deal (LGF) Programme (tranches 1, 2 and 3).

RESOLVED:/

1. That the progress made in relation to the Growth Deal Transport schemes as set out in Sections 2, 3 and 4 of the report be noted;
2. That the progress made in relation to the Non-Transport Skills Capital and Economic Development and Regeneration (ED &R) programmes as set out in Section 5 of the report be noted;
3. That the use of returned Life Sciences funds to proceed with Life Sciences 2, as set out in Section 5.5 of the report be noted.

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Economic Monitoring Dashboard

Please click the link below to access the full dashboard:



Tracking the Greater Manchester Economy

The Economic Resilience Dashboard aims to provide up to date intelligence on the conditions in the Greater Manchester (GM) economy and emergent issues such as the rising cost of living.

This is a condensed version of the Dashboard divided into two sections:

- **Greater Manchester Business Resilience** provides indicators on business resilience in GM.
- **Labour Market and National Indicators** provides indicators on the Labour Market and indicators on the state of the economy nationally.

To access the full version of the Economic Resilience Dashboard, please click the link in the top right.

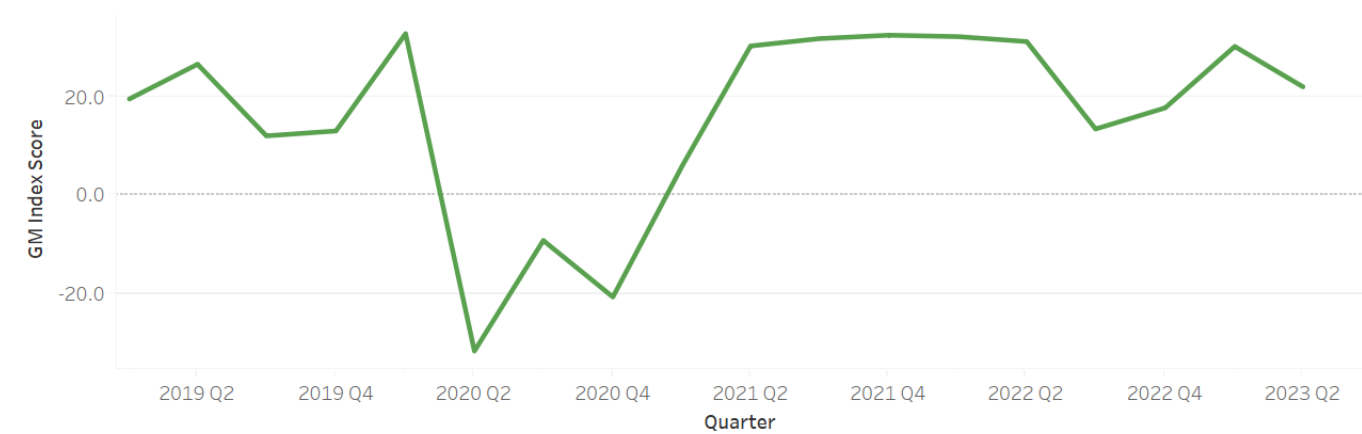
The economic data in response to Covid-19 and other events is changing rapidly with new datasets becoming available and others being withdrawn on a regular basis. The dashboard will be updated with the best available data each month.

We would welcome feedback on alternative measures to be included in the dashboard or insights on the data provided. If you have any feedback please email ellie.wright@greatermanchester-ca.gov.uk.

Business Growth Hub Survey



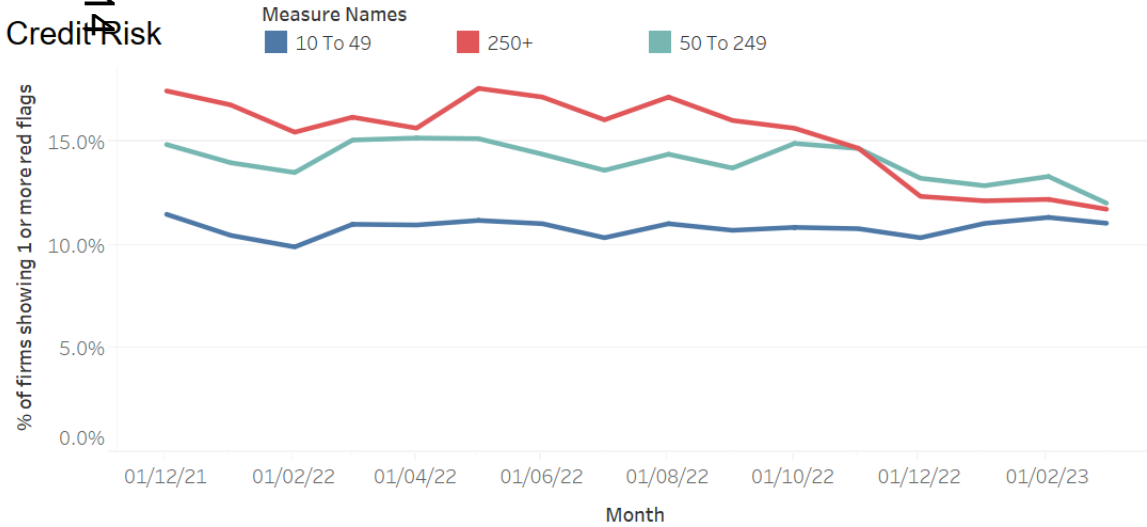
GM Index (Quarterly)



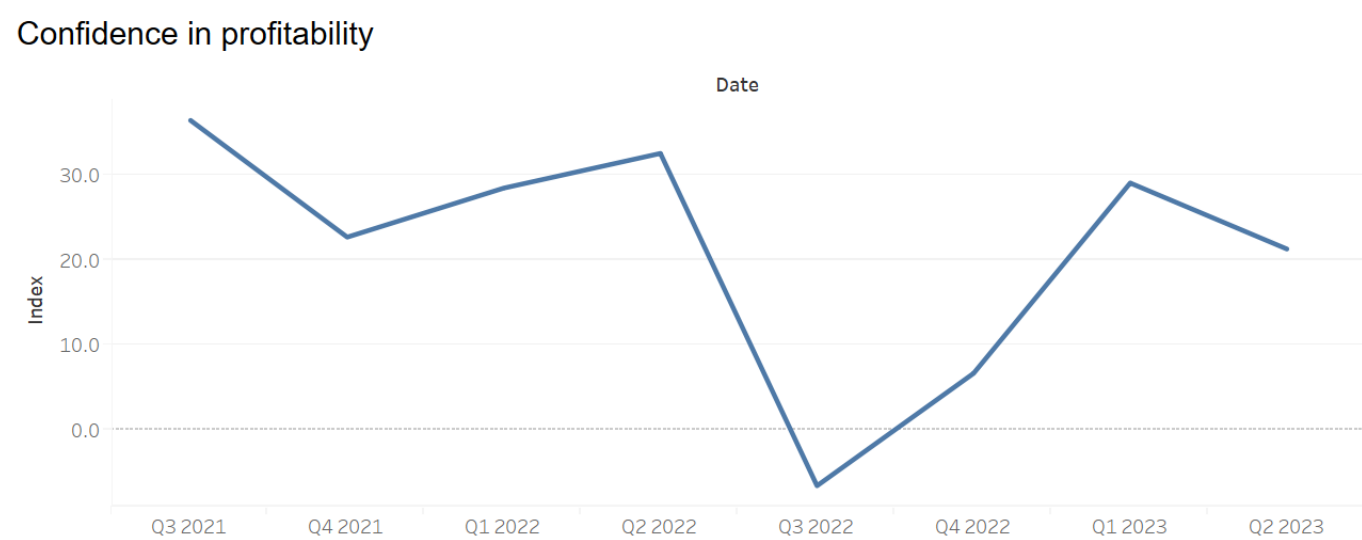
The proportion of businesses reporting rising costs within the Growth Hub's most recent Business Survey rose by 4 percentage points to 40%. This is consistent with a series of rises from October onwards despite the figure stabilising in April. 16.0% of businesses reported cashflow issues in the most recent data, a decrease month on month following a series of rises from October to March.

Greater Manchester Chamber of Commerce's GM Index increased from 30.3 in Q1 2023 to 22.1 in Q2 2023. The index brings together a range of indicators from the Chamber's Quarterly Economic Survey (QES) to provide a measure of business confidence.

Credit Risk



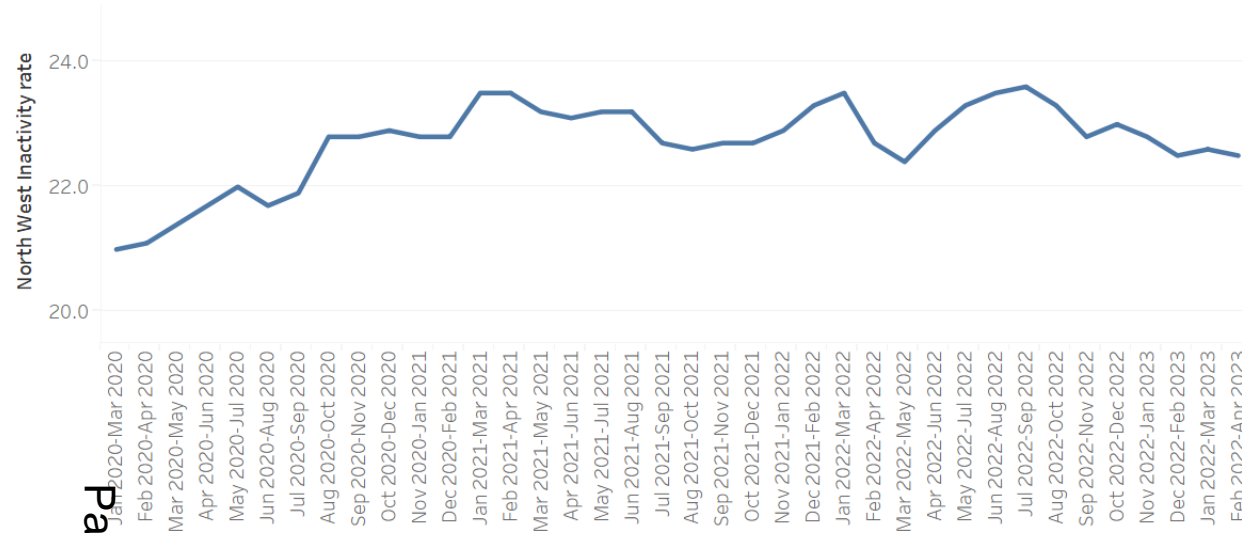
Confidence in profitability



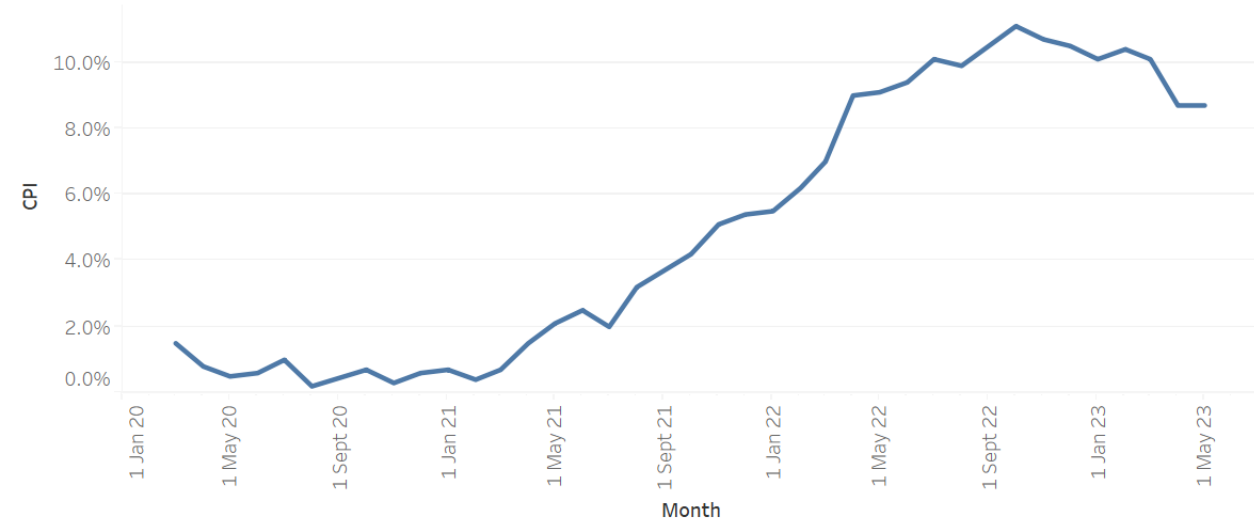
The latest available credit risk data remains from March 2023. This is because the method for recording credit risk data has changed, resulting in a delay in new data being published. In the month to 1st March, 11.3% of all firms with 10 or more employees in GM had 1 or more red flags, compared to 10.2% for the North West and 10.6% for the UK as a whole. Since August 2022, credit risk among small firms (10 – 49 employees) has remained stable at 11.0. However, the risk has reduced among large firms (250+), decreasing by 5.4 percentage points over the period.

GM businesses' confidence in their profitability, as measured in the Chamber of Commerce's QES, decreased from 29.1 in Q1 2023 to 21.3 in Q2 2023. Confidence in the Construction and Service sectors declined between Q1 and Q2 2023, while Manufacturing improved.

NW Economic Inactivity Rate



UK Inflation



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Total economic inactivity was 1,015,000 (22.5% of the working age population) in the NW in the three months to April 2023. This compares with 21.0% across the UK as a whole. Inactivity in the North West (NW) was broadly flat in the three months to April 2023 - but marginally down on the previous period. This follows the pattern of decline since mid-2022. Further data releases will establish a clearer view.

UK inflation as measured by the Consumer Price Index was 8.7% in the 12 months to May 2023. This was a 1.4 percentage point decrease from the March figure of 10.1%. The largest upward contributions to the annual CPIH inflation rate in May 2023 came from rising prices for air travel, recreational and cultural goods and services, and second-hand cars.

<p>Claimant Count</p>	<p>92K residents claimed unemployment benefit in May 2023.</p>	<p>-3.0% month on month</p>	<p>The fall in GM was greater than the national average (-1.9%).</p>	<p>UK Sectoral PMI's</p>	<p>Construction PMI: 48.90 Manufacturing PMI: 46.50 Services PMI: 53.70</p>	<p>Month on month change in PMI points by sector - Construction: -2.7 Manufacturing: -0.6 Services: +1.5</p>	<p>A score above 50.0 indicates growth.</p>
<p>Job Vacancies</p>	<p>There were 48K new job postings in June 2023</p>	<p>+2.2% month on month</p>	<p>New postings made up 31.4% of total job postings.</p>	<p>UK Consumer Confidence</p>	<p>The Consumer Confidence Index was -24 in June 2023</p>	<p>+3 points month on month</p>	<p>Consumer Confidence is at its highest level since January 2022.</p>

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GM Business Board

SUBJECT: GC: Business Support, International and Marketing Update

DATE: 19th July 2023

FROM: Mark Hughes, Group Chief Executive, Growth Company

PURPOSE OF REPORT

To provide an update on the business situation in Greater Manchester and how, in response, The Growth Company (GC) is providing support to GM's economy. The report focuses on GC's Business Growth Hub, Business Finance, Marketing Manchester and MIDAS, and presents key activities. More detailed activities are provided in **Appendix 1**.

RECOMMENDATIONS:

The GM Business Board is requested to: Note the contents of the report.

CONTACT OFFICERS:

Mark Hughes MBE – Group Chief Executive, The Growth Company

Mark.Hughes@growthco.uk

Equalities Impact, Carbon and Sustainability Assessment:

GC is committed to putting equality, diversity and inclusion (EDI) at the centre of its services. The activities which are updated upon within this report are delivered with the recognition of the importance of supporting a diverse range of businesses and individuals and providing equal opportunities. Programmes are designed and monitored for EDI. Engagement and support levels with ethnic minority led businesses are on par or better than diverse communities' composition in the GM business base or resident population. This positive

position needs continuous development, and more research is needed to understand any differentials in impacts and future business trajectories post-delivery of support.

GC also supports and delivers services which contribute towards GM's ambition to achieve carbon neutral living in the city-region by 2038. This includes specific projects such as the Low Carbon programme and the newly launched online business support platform beenetzero.co.uk alongside the GM Business Board. GC also provides a focused development programme for 'Green Economy' businesses. GC will move from its current position of Carbon Neutral to scope 1 & 2 with gold standard offset to Net Zero (Scope 1-3) with residual GHG offset through neutralisation measures in line SBTi guidance by 2035.

Risk Management:

N/A

Legal Considerations:

N/A

Financial Consequences – Revenue:

N/A

Financial Consequences – Capital:

N/A

Number of attachments to the report: 1

BACKGROUND PAPERS:

N/A

SURVEY RESULTS

GC Business Survey. 235 responses June-July 2023 (previous month's in brackets). The profile is broadly representative of the GM business base, but for an over-representation of SMEs, manufacturing and DCT businesses, and under-representation of retail and hospitality businesses.

- **The GC Business Confidence Index (GC-BCI)**, a ranking of how confident businesses are on their growth prospects for the year ahead, currently stands at 7.5 out of 10, slightly higher than the previous month, and broadly similar to the average for the last 3 months.
- **Sales and profits.** 24% (vs 21% previously) of firms reported that they experienced an increase in sales in the last month, and 67% expect profits to increase (vs 64%), and slightly higher than the same time last year. Just 1% (vs 2%) expect profits to decrease.
- **Investment.** 49% (vs 45%) of firms expect to increase Capex spend in the year ahead. 49% (vs 41%) of firms expect to increase their allocation towards investing in workforce development and skills, business model change (47% vs 43%), and innovation (49% vs 42%).
- **Impacts.** Rising costs (39% vs 43% previously), supply chain- minor issues (20% vs 22%), and decreased sales (12% vs 17%). The logistics sector was most likely to report decreased sales.
- **Cash reserves.** 66% (vs 70%) of firms report that they have cash reserves to last over 6 months. 85% of SME's with 10-49 employees have cash reserves to last over 6 months, and reserves were highest in construction (78%), manufacturing (76%), and life sciences (75%).
- **Cashflow.** 22% (vs 15%) of firms said they had cashflow problems. Micro-size firms (<10 employees) were more likely to report cashflow issues compared to SMEs (10-249 FTEs). Hospitality, construction, and retail were the most likely to report cashflow problems.
- **Innovation activity.** 30% (27% previously) have invested in new / significantly improved services, 31% (vs 19%) implemented new business practices, 20% (18%) had invested in advanced R&D activity, and 25% (26%) of firms introduced new / significantly improved goods.
- **The main pressing challenges facing business.** Access to new domestic sales opportunities (59% vs 53%) (highest impacts in construction and green tech services), developing the business model (43% vs 42%), managing overall business finances (44% vs 41%), developing new products/services (28% vs 36%), and workforce development (26% vs 24%).
- **Recruitment.** 22% (vs 22% previously) of firms are currently recruiting new staff, 19% (vs 13%) with difficulties. The main occupational groups recruiting are customer facing roles (42% vs 28%), managerial roles (13% vs 10%), and other roles 'not elsewhere classified' (8% vs 18%).

- **Workforce skill gaps.** 43% (vs 51%) of firms said that their workforce skills are only 'partly' at the level to meet business plan objectives. The main technical skill gaps identified are: specialist technical skills (38%), knowledge of products/services (14%). The main personal skill gaps identified are: sales (20%), ability to manage time (11%), and managing/motivating staff (11%).
- **Approach to social value.** 68% (67% previously) said they guarantee at least 16 hours of work per week; 65% (68%) pay the Real Living Wage (currently £10.90 in GM); 56% (51%) offer flexible working options; 39% (30%) involve employees in the overall direction of the business.
- **GM Chamber of Commerce Quarterly Economic Survey Q2** (published June 2023) results revealed a slight decline in economic performance in GM. The GM Index decreased to 22.1 from 30.3 in Q1 2023. Sales to UK customers decreased across the services, manufacturing and construction sectors. International trade also declined, with manufacturing businesses reporting decreased export sales. Business investment and confidence showed a mixed picture. While businesses expected stability in demand, optimism regarding profitability showed marginal decreases due to existing price increases with limited further scope to increase profits.
- **FSB Small Business Index Q1 2023 (published June 2023).** The Small Business Index (SBI) increased to -2.8 in Q1 2023 – this uptick follows three consecutive quarterly declines. The SBI is now at its strongest position since Q1 2022. The net balance of small businesses reporting revenue growth over the previous three months stood at -7.1% in Q1, reflecting the pressures on revenue from high input prices and weaker consumer demand. 91.8% of businesses reported increased costs compared to a year ago in Q1. This represents the highest net balance figure on this measure since data collection began, highlighting the widespread nature of cost pressures at present.

GC SUPPORT SERVICES & ACTIVITIES

BUSINESS GROWTH HUB

GM Shared Prosperity Fund (SPF) - E23 (Core Business Support) GC BGH has been successful in securing £7.5m of SPF to deliver core business and enterprise support across GM until March 2025. Now working closely with GMCA on a six-week mobilisation plan. Grant Funding Agreement is expected within the first two weeks of July. A key element of mobilisation is to work through how SPF and the £6.05m Retained Business Rates funding

will work together to ensure a joined up and enhanced client experience. There may also be further local authority level opportunities within GM as the implementation plans develop, particularly around SME workspace support, with conversations taking place with Bolton and Salford.

GM Shared Prosperity Fund (SPF) - E19 (Innovation) – tender likely to be published in July 2023 and GMCA have outlined their preference is for a consortium approach and the expected timing for the contract start is 1st October 2023.

Investment Portal. The investment portal to provide information and guidance to SME looking to raise finance is underdevelopment and a pilot platform is planned to be available at the end of July. Following further user testing and potential refinement a public launch is set for September.

Good Employment Charter. Over 1,600 employers engaged with the Charter Unit, with c.650 supporters and some 92 full Members. GM Good Employment Week was held 19-24th June with 25 events in partnership with local authorities, professional bodies and sectoral organisations. A high-profile campaign has been undertaken to promote “The How Good is Your Job?” with 3,0000 responses to date. Following this, there is an increasing pipeline of employers seeking to become full Members of the Charter.

Social Value Support. Recent work with training providers (Upturn Enterprise CiC, Elevate, On the Level, Flourish Together CiC) to deliver business support targeted at diverse-led businesses has now been completed. Cohort programmes and one to one advisory services were to delivered to 84 LGBTQ+, ethnic minority and female-led businesses. This work has/will continue to help shape the accessibility and inclusivity of GC’s ongoing service provision.

A BGH commissioned research project, working with the Black United Representation Network and Aston University is now underway. The ‘Barriers to Innovation for Ethnic Minority Businesses’ project is engaging with a wide number of stakeholders across GM to identify and evaluate the reasoning, potential barriers and opportunities for ethnic minority led businesses in designing and/or implementing innovative products and services that can be scaled sustainably. The project follows on from the Time to Change report in 2022 and will look to produce its findings in September 2023.

EnterprisingYou (EY). Since the programme began (March 2020), the programme received 8,986 enquiries, with 3,104 people starting on the programme (62% female, 38% male, 26% ethnic minority leaders, and 22% aged 50+). Recent events include Bolton University, Bury Business Improvement District (BID) and Fire-up Rochdale. EY held a celebration event on the 12th of July 2023, including the Mayor of GM as guest speaker, who launched the programme in March 2020, along with an EY client Louby Lou.

Create Growth (CG). The Create Growth Programme has successfully completed its first cohort with strong feedback of 9.5 out of 10. 20 creative sector businesses participated from a variety of subsectors, such as design, publishing, performing arts and production. The curriculum for the SME's was centred around investment readiness and also included inclusive leadership, product innovation, sales and marketing, IP and trademark strategy as well as value-based pricing.

Skills for Growth (SFG) SME Support. To end June 2023, 7,519 businesses have been engaged, 3,779 SME Productivity Plans completed, 4,584 referrals have been made to GM Bridge and Good Employment Charter, 261 new apprenticeships, 10,376 individual skills plans created, and 2,735 completions claimed. We have moved into the contract extension profile, which is on track to achieve targets, with more focus on individual skills plans as we move into the last 3 months of delivery.

Leadership and Management - GM Leadership Hive. Since January 2022, to end June 2023, the BGH leadership programmes have engaged with 747 SMEs, intensively supported 344 SMEs, with 468 leaders from those businesses on the Executive Development Programme, WFD and Mentoring programmes accessing leadership development. All active delivery concluded at end of June 23, with focus on the collection of impacts from Jul-Oct 23 for jobs created and new products/services.

Access to Finance. 884 business assists generated (102% against target), completing the delivery phase of the ERDF contract. The team have helped businesses to create 378 new jobs and generated 538 Funding Offers, totalling £64.5m (£34.3m debt-based products and £27.8m in equity investments). Focus now on collection of outputs including New Jobs Created, New to Firm products and additional Funding Offers. Work is also ongoing to support the Create Growth Investment Readiness programme managed through the Digital, Creative and Tech team.

Innovation. Since 2019, the Innovation Service has generated c.917 business assists, 115

collaborations, 129 new to firm products, 67 new to market, and a total of 376 new jobs created. Programme collaborations continue between SMEs and the GM Universities across technology areas, including rapid prototyping, eco/environmental, advanced materials/chemistry, manufacturing, digital and creative, and AI/machine learning. The **Innovate UK Edge** team has continued to strong deliver in Q1, with over 90 new innovative SME's engaged and have helped to attract nearly £6m in grant funding and private investment and created over 70 new jobs.

Made Smarter. Q1 2023/24 (Apr-Jun) Made Smarter Adoption Programme has met/exceeded all but one KPI. The programme is waiting for feedback from the Department for Business and Trade (DBT) re the re-introduction of the Digital Technology Internship (DTI) programme (students).

BUSINESS FINANCE

Business Lending. GCBF invested £2.2m into GM SMEs in the first Quarter of 2023/24, including £1.9m in loans to 133 GM start-ups and £0.5m in growth business loans into 5 more established SMEs. The business loan WIP is consistent, with £0.73m across 16 businesses applications. The lending team continue to monitor the cost-of-living crisis, however, current provision levels within the loan books remain in line with prior year expectations. Pro-active support is offered to borrowers affected by both post-Covid market change and the impact of the cost-of-living crisis.

Angel & Innovation Finance. Following a strong Q4 last year which saw GC Angels invest £0.6m into 5 companies unlocking £1.2m into high innovation GM SMEs including two GIEC spin outs and a female FinTech company, GC Angels has focused on starting to raise a dedicated £30m fund to sustainably support the innovation gap in GM for the next 10 years. We now have over 230 GM opportunities that we are tracking and an integrated suite of partner advice for companies not yet ready to receive external funding. The portfolio is made up of 36 investments valued at £3.1m which has attracted £16.8m in additional capital. Over 40% of the companies are female founded and 25% founded by ethnic minorities. GC Angels has been accepted as an investor partner on to the Future Economy Programme by Innovate UK allowing access grants to develop innovative R&D projects.

Start Up Loans. During Q1 2023/24, GCBF issued 133 Start-Up Loans to the value of £1.89m in GM, and a further 230 loans across the UK under the new National Business Support Partner contract, we continue to work closely with the Growth Hub, integrating

workshops and one 2 one support. GCBF are currently bidding on the next phase of the Northern Powerhouse Investment Fund (NPIF 2), targeting the Small Loan Funds NW Lot of £16m plus a reserve to be invested in SMEs from April 2024 for which GC is the current provider.

INTERNATIONAL, MARKETING, AND INWARD INVESTMENT

Marketing Manchester

Local Visitor Economy Partnership (LVEP). VisitEngland recently approved Marketing Manchester's application to become the LVEP on behalf of the city-region of Greater Manchester. The CEO of VisitBritain/VisitEngland, the national tourism body, recently visited Manchester on a two-day fact-finding tour to be briefed on Greater Manchester's growing tourism offer. Her visit included tours of: Coop Live, Etihad Stadium, RHS Bridgewater, Science and Industry Museum and Aviva Studios/Manchester International Festival.

Accommodation Business Improvement District (ABID). Year 1 workstreams have been developed with the first meeting to brief businesses on activity held on 5 July with over 50 businesses represented. Activity highlights include a new street cleaning programme which focuses on visitor arrival points; a new cohort of City Hosts who will be visible in the city to help visitors; and a marketing campaign to encourage short breaks during August.

Business Conferences and Events. In Q1 (Apr-Jun), 23 bids submitted with a potential for 85,910 delegates and an economic impact of £114.7m. 9 bids were won in Q1 with an economic impact of £16.7m bringing 2,004 delegates/participants to GM. Currently the pipeline is buoyant with 153 live opportunities, 22 bids are required and 37 bids are pending decisions. To continue to raise the profile of Greater Manchester as a destination for business visits and events, the team attended IMEX Frankfurt on the VisitBritain stand week commencing 22 May, and had 45 appointments over three days. Follow up is now being undertaken and 5 bids have been submitted. The team attended The Meetings Show in June, with 5 business tourism partners joining the Manchester stand. 66 appointments were conducted and leads are being followed up.

Place Partnership Programme. Building on the successful events of 2023, a programme of real estate promotional activity and events will be launched in Jul/Aug to offer partners the opportunity to engage in a full year programme including MIPIM, UKREiff, London Real Estate Forum and Expo.

UKREiiF – 16-18 May 2023. GM exhibited in partnership with Opportunity London to deliver a joint city presence at The Canary. 29 GM partners joined the partnership from across public and private sectors. A total of 24 speaking opportunities for the GM delegation, included sessions on Atom Valley, Devolution, Transforming Transport and Levelling Up. Social media reach for the event was 2.4m with 37 pieces of coverage in the media providing approximately 14.5m opportunities to see.

London Real Estate Forum (LREF) - 28-29 September 2023 and Expo – 4-6 October 2023, Munich (as part of a UK Cities collective) attendance planning is well advanced and for **SXSW in and MIPIM** both in March 2024 is underway.

Domestic Marketing - Manchester Flower Festival (June) – delivered a campaign promoting the Manchester Flower Show on behalf of CityCo. In total this paid media delivered over 1.25m impressions, with 63k page views on Visitmanchester.com. **Soccer Aid (June)** – delivered an OOH campaign to target overnight stays focussed on the Soccer Aid match in Manchester. In-kind placements delivered 4.7m impressions across key sites throughout London.

International Marketing – GREAT Gateway Innovation Fund Campaign. The US GREAT campaign was delivered in June and July targeting 'Experience Seekers' in the New York tristate area in partnership with Aer Lingus and Visit Wales. The campaign incorporated a number of elements, e.g. Expedia Campaign, Sojern Campaign (Sojern is a travel marketing platform), influencer campaign, Google Web Stories, radio promotion, press and media visits (hosted 4 journalists throughout May/June), created new photography and film content. The final evaluation will take place in August. At a follow up meeting with New York Tourism & Conventions, it was agreed to deliver a city-to-city tourism partnership scheduled for late October in New York.

Sector / Thematic Campaigns. During Q1 City to Scale final campaign activity was delivered to complete the programme. As the ERDF funded sector marketing programme finished at the end of Q1, a new 23/24 sector marketing plan was developed in Q1 and will be implemented Q2 onwards.

Sector media and PR.

- In Q1, there were multiple PR announcements related to Greater Manchester's economy, trade and investment. These included new routes to Vegas from Manchester Airport, JP Morgan's investment in Manchester, the Nasscom MoU in partnership with MAG and MIP, and figures from DBT which showed Manchester topping the tables for FDI.
- As a result of huge media interest in India for the Nasscom MoU, the OTS for Q1 reached new heights of over 18m OTS media coverage. This was considered as a unique catapult innovation project in India resulting in national high profile coverage, hence very high OTS achieved. India media coverage was not included when KPIs were set, so noting that this will skew and significantly increase the OTS figure against target.
- Thought leadership opportunities were also arranged for sector representatives on topics such as UKREiiF, roundtables on tech and space with North West Business Insider and The Fintech Times, which resulted in positive coverage online and in print.
- To further position Greater Manchester as a leading city for investment, organic content was regularly published on the investinmanchester.com website, which included interviews with recent investors and sector insights related to attendance in Q1 at events including Money 2020, Advanced Materials Show and Medtech Japan.

Inward investment: MIDAS

Foreign Direct Investment Review. Lord Harrington is leading a review of foreign direct investment which will look to address the governance and operations of inward investment, including the Office for Investment, central and local partnerships, as well as the incentives for inward investment. The review will focus on digital technology, creative industries, life sciences, advanced manufacturing and green industries. Discussions are being had with the department on the review which is due to conclude Sept 2023. In response to the review, GC through MIDAS has directly inputted to Lord Harrington and in its Chair of the NPH T&I Officer's Group is working with the NP11 to formulate a Northern response to be shared with Lord Harrington by the end of July.

Shaping Future Activity. Initiating two pieces of strategic work to inform our market and sector priorities. These will provide an evidence base and focus for future targeted and proactive activity:

- **US Deep Dive:** Strategic deep dive research project on the USA to support the next stage of implementing the Greater Manchester International Strategy. This research will

identify which cities, regions, and sectors in the US should be targeted, while also identifying secondary emerging opportunities for future years also reflecting the existing relationships that GM has developed in the US over several years.

- **Inward investment for advanced manufacturing and advanced materials.** We need to update our assessment of GM's comparative advantages and distinctive value proposition to attract further advanced manufacturers, advanced materials, and low carbon firms into the city region. This research will address short term investment opportunities, including in markets like EV and mega factories, as well as the longer-term trends shaping international investment, such as net zero, supply chain redesign, and technology changes.

Results

- Year to date, there have been 11 successful inward investment projects and 274 jobs created. This year's YTD position is comparable to 2020/21 and 2021/22. It is behind the YTD position in 2022/23 (20 projects and 1,702 jobs), which was a significant 'catch-up' period for investors.
- Successes include 2 R&D projects. Of the total job created, 93% will be paid above the real living wage and 47% will be paid above £35,000. Although the target on the proportion of jobs paid above £35,000 is currently behind target, it is expected that this will be met over the year.
- The MIDAS pipeline has 47 projects and up 3,372 corresponding jobs with a strong-very strong chance of successfully closing this financial year. This includes 13 R&D, 14 HQ and 9 low carbon projects. MIDAS also continues to add projects to the existing pipeline and have begun engagement with 64 new projects so far in 2023/24.

Recent successes:

- **Wahed X.** Part of the US headquartered Wahed X, an ethical halal investment platform. This division is the private investment arm that funds ethical tech businesses using finance from a portfolio of HNW investors, creating 27 jobs.
- **JC Decaux.** As part of their strategic growth plans for the North of England and Scotland, JC Decaux are building out the partnerships team for Greater Manchester and the wider Northern region. Created 3 new roles and safeguarded 30 jobs. Project closed June 2023.
- **Zedify.** A zero-emissions logistics company, Zedify selected Manchester as the next phase of their UK expansion, creating 30 new jobs.

Examples of Current Project Pipeline:

- **Project Brooks.** US Battery Manufacturer looking for first international site for pilot production. 150 forecast jobs.
- **Project Fab.** A leading semiconductor manufacturer with plans to create a new Fab Plant to for next generation of compound semiconductors. Also include an R&D centre. 300 jobs.
- **Project Brew.** A Canadian Graphene manufacturer, who will be taking space at GEIC and then looking for pilot production facility in the next twelve months.
- **Project Blade.** Spanish-owned renewables manufacturer looking at UK&I footprint consolidation along with a training facility. Invest heavily in green skills training centre for installation, maintenance and servicing. 20 new jobs.
- **Project Magnitude.** US Headquartered company looking to establish a Quantum Centre of Excellence in the UK - 20 new Jobs.
- **Project UK Scale.** European Headquartered Digital Transformation company looking to establish a UK base in the North of England - 700 jobs.

Sector Programmes. Detail of Financial & Professional Services, Creative Digital & Tech, Life Sciences & Healthcare, and Advanced Manufacturing and Materials initiatives are set out in Appendix 1 (page 11).

Japan Steering Group

- Planning has commenced for the Mayoral mission to Japan, provisionally w/c 4th December 2023 – visiting Osaka & Tokyo. Sector focus will be Low Carbon, Life Sciences and Advanced Materials, and planning meetings have been held with DBT in Japan, Osaka Chamber of Commerce & Industry (OCCI), University of Manchester, DBT NPH Trade team, Osaka City officials and the office of the Governor or Osaka Prefecture.
- MIDAS have agreed with OCCI and DBT NPH Trade team to host two sector focused webinars in the Autumn to introduce OCCI members to the GM (& NPH Trade) opportunities as a prelude to the December visit and in-person meetings.

Manchester India Partnership (MIP)

- MIP hosted a DBT delegation of 25 tech companies from India in Partnership 21-22 June. The delegation visited on the back of the London Tech Week.
- MIP has delivered a tripartite MOU with India's premier business association for tech companies NASSCOM to offer 10 free desk spaces for a year at Manchester Airport's 4m office space. The MOU was signed on the 28th June in the presence of the Consul General Dr Shashank Vikram. 7 companies have expressed interest in establishing operations so far. Similar NASSCOM agreements in Canada are estimated to create 200 jobs within 2 years.
- The Catapult Connected Places Net Zero Innovation Twinning Report has been successfully launched and follow up discussions between the GMCA and Catapult are ongoing around further cooperation on Net Zero Twinning Frameworks for other geographies. MIP will be convening a Greater Manchester and Bangalore Stakeholder online session in the near future to explore further opportunities.
- MIP will be exploring a broad strategy refresh and a re-examination of the GM value added proposition for India in the coming months to reflect recent changes in the organisation.

Manchester China Forum (MCF)

- MCF co-hosted the Manchester visit for Incoming HM Trade Commissioner (HMTC) to China alongside with DBT Northern Powerhouse on 27 and 28 June, meeting stakeholders including University of Manchester, Manchester City Football Group, BCEGI, Manchester City Council, and FECIL as well as MAG during a private dinner.
- MCF hosted the visit of Sinosynergy – a Chinese hydrogen fuel cell company interested in exploring local commercial opportunities to Manchester. The company met with representatives from MIDAS, MMU Fuel Cell Innovation Center, TfGM, and Carlton Power.
- MCF Executive Director attended the Great Britain China Center (GBCC) Senior Leadership Forum along with Paul Dennett, Deputy Mayor of GM and City Leader of Salford. This was the first time for GBCC to extend the invite to a non-MP audience from this region – GM was represented at this important session, which provided the opportunity for an open and frank discussion regarding the latest on the UK-China bilateral relationship.

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SURVEY RESULTS

- **GC Business Survey.** The following sections relate to the 235 responses completed between the 05 June 2023 and 03 July 2023. The survey has 9,000+ responses since its launch in March 2020. Previous month's results are provided in brackets. The profile is broadly representative of the GM business base, but for an over-representation of SMEs, and manufacturing and DCT businesses, and under-representation of retail and hospitality businesses.

Growth, business confidence and investment

- **The GC Business Confidence Index (GC-BCI)**, a ranking of how confident businesses are on their growth prospects for the year ahead, currently stands at 7.5 out of 10, slightly higher than the previous month, and broadly similar to the average for the last 3 months.
- **Sales and profits.** 24% (vs 21% previously) of firms reported that they experienced an increase in sales in the last month, and 67% expect profits to increase (vs 64%), and slightly higher than the same time last year. Just 1% (vs 2%) expect profits to decrease.
- **Investment.** 49% (vs 45%) of firms expect to increase Capex spend in the year ahead. 49% (vs 41%) of firms expect to increase their allocation towards investing in workforce development and skills, business model change (47% vs 43%), and innovation (49% vs 42%).

Main impacts from the current situation and financial resilience

- **Impacts.** Rising costs (39% vs 43% previously), supply chain- minor issues (20% vs 22%), and decreased sales (12% vs 17%). The logistics sector was most likely to report decreased sales.
- **Cash reserves.** 66% (vs 70%) of firms report that they have cash reserves to last over 6 months. 85% of SME's with 10-49 employees have cash reserves to last over 6 months, and reserves were highest in construction (78%), manufacturing (76%), and life sciences (75%).
- **Cashflow.** 22% (vs 15%) of firms said they had cashflow problems. Micro-size firms (<10 employees) were more likely to report cashflow issues compared to SMEs (10-249

FTEs). Hospitality, construction, and retail were the most likely to report cashflow problems.

Employment, skills and workforce development

- **Recruitment.** 22% (vs 22% previously) of firms are currently recruiting new staff, 19% (vs 13%) said they had difficulties recruiting. The main occupational groups recruiting are for are customer facing roles (42% vs 28%), managerial roles (13% vs 10%), and other roles 'not elsewhere classified' (8% vs 18%).
- **Workforce skill gaps.** 43% (vs 51%) of firms said that their workforce skills are only 'partly' at the level to meet business plan objectives. The main technical skill gaps identified are: specialist technical skills (38%), knowledge of products/services (14%), advanced specialist IT skills (11%), and complex problem resolution (10%). The main people and personal skill gaps identified are: sales (20%), ability to manage time (11%), managing/motivating staff (11%), customer handling (10%).
- **Workforce development.** 49% (vs 41%) of firms said they are looking to increase investment in workforce development in the next 12 months, 47% (vs 54%) said they thought investment levels would remain the same, and 3% (vs 2%) were unsure.

Research, development, and innovation (*new questions added to survey*)

- **Innovation activity.** 30% (27% previously) have invested in new / significantly improved services, 31% (vs 19%) implemented new business practices, 20% (18%) had invested in advanced R&D activity, and 25% (26%) of firms introduced new / significantly improved goods.
- **Digital innovation.** 6% (vs 7%) Invested in the acquisition of digital products or digital services specifically for innovation; and 7% (8%) had made investments in the acquisition of advanced machinery or equipment - specifically for innovation.
- **Main sources of innovation.** The top 3 sources of innovation within firms were 47% (vs 41%) said staff within their own business, 26% (vs 21%) said clients / customers; and 15% (vs 13%) suppliers of equipment, materials and services.
- **The main barriers to growing innovation.** 20% (vs 16%) cited direct innovation costs are too high, 27% (vs 13%) stated lack of available finance, 22% (vs 13%) said finance costs is too high, and 20% (vs 24%) of firms said they faced no barriers to innovation.

Social value and good employment practices (*new questions added to survey*)

The GC survey now asks about businesses' approach to social value. This includes the extent to which companies have the following:

- **Guarantee at least 16 hours of work per week for employees.** 68% (67% previously) said this currently applies, and 13% said they were likely to include in future.
- **Pay the Real Living Wage** (currently £10.90 in GM). 65% (68%) said this currently applies, and 16% said they were likely to include in future.
- **Offer flexible working options to employees.** 56% (51%) said this currently applies, and 19% said they were likely to include in future.
- **Involve employees in the overall direction of the business.** 39% (30%) said this currently applies. 23% said they were likely to do in future.
- **Actively look to increase the diversity of the workforce** (through recruitment & progression). 51% (44%) said this currently applies, and 27% said they were likely to include in future.
- **Actively promote healthy work practices.** 49% (44%) said this currently applies, and 24% said they were likely to include in future.

Other challenges and future support needs

- **The main pressing challenges facing business.** Access to new domestic sales opportunities (59% vs 53%), (highest impacts in construction and green tech services), developing the business model (43% vs 42%), managing overall business finances (44% vs 41%), developing new products/services (28% vs 36%), and workforce development (26% vs 24%).
- **The main areas of future support.** Looking to the year ahead, the main areas identified are business planning (42% vs 44%), marketing (30% vs 35%), innovation (28% vs 27%), workforce development (30% vs 29%), and financial advice (33% vs 22%). 17% (vs 18%) are looking for extra support to manage their environmental impact.
- **International trade.** 9% (vs 8%) of firms undertaking overseas trade said they were looking to expand in current markets. 26% of small SMEs (10-49 employees) are looking to expand in new markets - and mainly those firms within the life sciences and engineering sectors.
- **EU transition.** 62% (60% previously) of firms said the impact of transition from the EU had a 'neutral' impact, whereas 14% (vs 14%) said 'negative', 23% (vs 25%) 'unsure', 0% (vs 0%) positive' overall.

Insolvency and redundancy risk

- **The number of registered company insolvencies nationally** in May 2023 was 2,552, 40% higher than in the same month in the previous year (1,825 in May 2022). However this was higher than levels seen while the Government support measures were in place in response to the coronavirus (COVID-19) pandemic and also higher than pre-pandemic numbers. There were 189 compulsory liquidations in May 2023, 34% higher than the number in May 2022.
- **GM Insolvency risk** (*note new rating system applied by RedFlagAlert from May onwards so no month- on-month comparison available*). Of the 19,880 with an rating score in GM, 10,916 (55%) were rated gold/silver/bronze (positive rating); and 7,195 (36%) have a provisional 1 RedFlag (i.e. change in business data indicating initial/early risk indication). 1,486 (7.5%) have one red-flag - risk-low, 253 (1.3%) have 2 red flags - risk medium, 30 (0.2%) have 3 red flags, closure imminent.
- **GM Redundancy risk (GC Survey)**. 2% (vs 2% last month) of firms said they were in the process of considering making redundancies.

Other business insights / local surveys

- **GM Chamber of Commerce Quarterly Economic Survey Q2-2023 (published June 2023)**.
 - Results for Q2-2023 revealed a slight decline in economic performance in Greater Manchester. The Greater Manchester Index™ decreased to 22.1 from 30.3 in Q1 2023.
 - Sales to UK customers decreased across the services, manufacturing, and construction sectors.
 - Manufacturing sector businesses experienced a downturn in demand, resulting in decreased capacity utilisation and cashflow positions.
 - International trade also declined, with manufacturing businesses reporting decreased export sales and advance orders.
 - Business investment and confidence showed a mixed picture. While businesses expected stability in demand, optimism regarding profitability showed marginal decreases due to existing price increases with limited further scope to increase profits.
- **Federation of Small Business Small Business Index, Quarter 1, 2023 (June 2023)**.

- The Small Business Index (SBI) increased to -2.8 in Q1 2023. This uptick follows three consecutive quarterly declines. The SBI is now at its strongest position since Q1 2022.
- All UK regions saw an improvement on the SBI in Q1, relative to Q4. Nonetheless, the SBI remained in negative territory in six of the UK's regions and nations.
- All major industries saw an improvement in their SBI readings in Q1 2023. Most remained in negative territory, however, with construction and professional, scientific and technical businesses recording positive scores.
- The net balance of small businesses reporting revenue growth over the previous three months stood at -7.1% in Q1. This marked the fourth consecutive negative reading on this measure, reflecting the pressures on revenue from high input prices and weaker consumer demand.
- The net balance of exporting businesses reporting growth in the value of their exports stood at -17.7% in Q1. This marked the sixteenth consecutive quarter for which the net balance of exports has stood below zero.
- 91.8% of businesses reported increased costs compared to a year ago in Q1. This represents the highest net balance figure on this measure since data collection began, highlighting the widespread nature of cost pressures at present.
- Utilities were the most commonly cited source of increasing costs, selected by 62.7% of respondents. The percentage of respondents who attributed rising costs to labour saw an increase from 40.5% in Q4 2022 to 45.3% in Q1.
- A net balance of -0.8% of small businesses reported growth in employee numbers in Q1. This marks a fourth consecutive negative reading, though it was less negative than the preceding three quarters.
- Just under half of small businesses expect to grow over the coming year. However, this share was slightly higher in Q1 than in Q4 2022, at 45.9% compared to 44.7%..
- The domestic economy is the most commonly cited barrier to growth amongst small businesses, with 61.3% of respondents selecting the category. Utility costs were the second-most selected barrier to growth amongst businesses in Q1, with 32.8% reporting this.
- Q1 brought a decline in the share of small businesses expecting to increase their investment over the coming quarter. This was the case for just 23.3% of respondents, down from 28.3% in Q4. Simultaneously, the share of small businesses expecting to cut investment over the coming quarter increased, reaching 21.2%, up from 19.0% in the fourth quarter of last year.

GC SUPPORT SERVICES & ACTIVITIES

BUSINESS SUPPORT

GM Shared Prosperity Fund (SPF) - E23 (Core Business Support) GC BGH has secured £7.5m of SPF to deliver core business and enterprise support across Greater Manchester until March 2025. GC BGH are now working closely with GMCA on a six-week mobilisation plan which includes a joint communications plan to GM stakeholders and business base. Key to mobilisation is working through how SPF and the £6.05m awarded Retained Business Rates funding will work together to ensure a joined up and enhanced client experience.

GM Shared Prosperity Fund (SPF) - E19 (Innovation) – tender likely to be published in July 2023 and GMCA have outlined their preference is for a consortium approach and the expected timing for the contract start is 1st October 2023.

Investment Portal. The investment portal to provide information and guidance to SME looking to raise finance is underdevelopment and a pilot platform is planned to be available at the end of July. Following further user testing and potential refinement a public launch is set for September.

Good Employment Charter. Over 1,600 employers have engaged with the Charter Unit, with c.650 supporters and 92 full Members. GM Good Employment Week was held 19-24th June, focusing on employees and the employee voice, reflecting the need to empower employees to understand, and be able to demand 'good employment'. 25 events were held across the week in partnership with local authorities, professional bodies and sectoral organisations.

A high-profile public awareness campaign utilising social and mainstream media was also used to promote "The How Good is Your Job?" and continues to be promoted through MCC & TfGM advertising assets, partners and charter members. The campaign is ongoing, full analysis will be undertaken in September when the campaign finishes. To date approximately 3,000 individuals have taken the quiz.

In partnership with the GMICP, a member of staff has been seconded to engage and develop a 'community of practice' across health and social care providers. This has led health care providers and GP practices coming forward as supporter/Full Charter Members. A similar

approach has been attempted in the Early Years sector, however current pressures on the sector require an alternative approach, with potential sector champions being explored.

Social Value Support. Recent work with training providers (Upturn Enterprise CiC, Elevate, On the Level, Flourish Together CiC) to deliver targeted business support at diverse-led businesses has now been completed. Cohort programmes and one to one advisory were delivered to 84 LGBTQ+, ethnic minority and female-led businesses.

BGH have commissioned a research project, working with Black United Representation Network and Aston University. 'Barriers to Innovation for Ethnic Minority Businesses' project is engaging with a wide number of stakeholders from Greater Manchester to identify and evaluate the reasoning, potential barriers and opportunities for ethnic minority led businesses in designing and/or implementing innovative products and services that can be scaled sustainably.

The Social Value Team completed its final cohort programmes, successfully completing the first 'Maximising Growth for Social Enterprises', which is now the Hub's primary social enterprise offering. The Bid Readiness workshop completed its final iteration in June also, with over 20 businesses attending.

The team's work with the VCSE (Voluntary, Community or Social Enterprise) sector has seen involvement in the ongoing development of the GM Inclusive Ownership Hub (formerly known as the Community Wealth Hub), which will look to be launched towards the end of 2023.

EnterprisingYou (EY). Since the programme began (March 2020), the programme has seen 8,986 enquiries, with 3,104 people starting on the programme (62% female, 38% male, 26% ethnic minority leaders, and 22% aged 50+).

Several events have taken place, including, a collaboration with Bolton University, a networking event with a social media workshop, a specialist event with Bury Business Improvement District focused on TikTok Training and EY hosted its first event at Fire-up Rochdale, delivering a marketing and podcast workshop. May and June saw the starts to programme profile exceeded for both months with 76 and 87, respectively.

Growth within the programme has remained steady with 33% of those that have completed the programme reporting an increase in Page 37 profit to £4.89M. 54% of those who have

completed also reported an increase in their current turnover levels to £13M, and 15% report no longer being reliant on benefits with a value of £685,346.

EY held a celebration event on the 12th of July 2023, including the Mayor of GM as guest speaker, who launched the programme in March 2020, along with an EY client Louby Lou.

Skills for Growth (SFG) SME Support. Up to June 23 end, 7,519 businesses have been engaged, 3,779 SME Productivity Plans completed, 4,584 referrals have been made to GM Bridge and Good Employment Charter, 261 new apprenticeships, 10,376 individual skills plans created, and 2,735 completions claimed. Focus is now on contract extension profile, where programme is on track to achieve targets with priority placed on individual skills plans during the last 3 months of contract delivery.

Leadership and Management - GM Leadership Hive. GMCA, the Business Growth Hub, and the four GM business schools are collaborating to deliver a £2M programme of executive coaching, targeted programmes and mentoring to GC BGH/University participants. The Leadership Hive is comprised of 4 main programmes: Executive Development (EDP), Workforce Development, Mentoring, and OPEN SME.

Since January 2022 to end June 23, the BGH leadership programmes have engaged with 747 SMEs, intensively supported 344 SMEs, with 468 leaders from those businesses on the EDP, WFD and Mentoring programmes accessing leadership development. All active delivery concluded at end of June 23, focus is now on the collection of impacts from Jul- Oct 23 for jobs created and new products/services.

iMentor continues to receive new applications for mentors and mentees daily, necessitating an increase in new mentors to meet the increase in mentee referrals. The Grow Your People – Grow Your Business cohort programme relaunched in April this year with 8 sessions delivered by the end of June 23, with a further 2 in July at the request of a local authority.

Access to Finance. 884 business assists generated (102% against target), completing the delivery phase of the ERDF contract. In addition, the team have helped businesses to create 378 new jobs and generated 538 Funding Offers, totalling £64.5m (£34.3m debt-based products and £27.8m in equity investments). The team supported a total of 38 businesses through the Here for Business campaign funded via UK SPF. Focus is now turning to collection of additional outputs including New Jobs Created, New to Firm products and

additional Funding Offers. Work is also ongoing to support the Create Growth Investment Readiness programme managed through the Digital, Creative and Tech team.

Growth Hub Innovation Service. Since 2019, the Innovation Service has generated c.917 business assists, 115 collaborations, 129 new to firm products, 67 new to market, and a total of 376 new jobs created. Programme collaborations continue between SMEs and the GM Universities across technology areas, including rapid prototyping, eco/environmental, advanced materials/chemistry, manufacturing, digital and creative, and AI/machine learning. The innovation voucher scheme has offered/awarded circa £336k in grant funding to support GM SME investment in R&D and has now committed all ERDF grant funding.

Close collaboration continues with Innovate UK at a Northwest strategic policy level and through Innovate UK EDGE on programme delivery. The GC EDGE team, although a separate service, work closely to provide a seamless customer journey, ensuring cross fertilisation of information and the development of service knowledge and client joint working.

Additionally, wider collaboration is carried out across the UKRI family including, access to catapults, Knowledge Transfer Network (KTN) and Knowledge Transfer Partnerships (KTP). KTPs are a key focus and outcome of the GC Business Growth Hub/university/UKRI partnerships, with 12 KTPs currently underway.

Innovate UK EDGE. The team has continued to deliver strongly during Q1, with over 90 new innovative SME's engaged with, as well as over 100 existing clients. Support has helped to attract nearly £6m in grant funding and private investment, creating over 70 new jobs.

Green Economy. Close of programme activity along with the continuation of the Demystifying Green Tech Webinar Series, delivered and promoted in partnership with the Bee Net Zero partners. The team have also delivered a session on GM Solar Supply Chain, including barriers and opportunities to its growth and uptake amongst GM residents and businesses to the GM 5-year Environment Plan Challenge Group members to inform a solar campaign to stimulate its uptake. Presentation was also delivered to share Greater Manchester's learnings on the solar stage of the installer show at the Birmingham NEC.

ERDF Carbon Reduction. 101% Enterprises Supported and 78% Carbon Savings as of June 2023 quarter end against full contract targets. Pipelines are strong and the team anticipate concluding the contract at 22% target for Enterprises Supported and 400

tonnes of carbon savings over contract target.

Made Smarter. Q1 2023/24 (Apr-Jun) delivery performance of the Made Smarter Adoption Programme has been strong with performance against all but one KPI being ahead of target. Project-funding applications made a slow start and are currently 4 behind target, however a substantial pipeline of clients having completed workshops and/or in project scoping means that the programme is confident that this deficit will be caught up by the end of Q2.

The programme is waiting to hear back from the Department for Business and Trade (DBT) in respect of the proposal submitted earlier in the year requesting the re-introduction of the Digital Technology Internship (DTI) programme (student placements). The re-instatement of the DTI programme would be a welcome change of policy if it were to receive ministerial and treasury approval.

Manufacturing Sectors Service. The GM Manufacturing Sectors Service achieved 101% of Enterprises Supported, 100% Jobs Created, 90% New to Market Products, and 68% New to Firm Products against full contract targets at June 2023 quarter end. Focus is now on the outstanding New to Firm Product target and collection of additional impacts / outputs. The Made for Manufacturing - Growth Service achieved 135% of Enterprises Supported at June 2023 quarter end against full contract target.

BGH Match. Latest BGH Match event took place in Bury on 4 July with a theme of economic development, allowing stakeholders at Bury Council to launch their local economic development plan. In this quarter, service also delivered a new brand awareness event, 'In Conversation with Dominic McGregor' where an interview was conducted with Greater Manchester entrepreneur Dominic McGregor, on their journey to global success with Social Chain.

BUSINESS FINANCE

Business Lending. GCBF invested £2.19m into GM SMEs in the first Quarter of 2023/24, including £1.89m in loans to 133 GM start-ups and £0.47m in growth business loans into 5 more established SMEs. The business loan WIP is consistent, with £0.73m across 16 businesses applications. The lending team continue to monitor the cost-of-living crisis, however, current provision levels within the loan books remain in line with prior year expectations. Pro-active support is offered to borrowers affected by both post-Covid market change and the impact of the cost-of-living crisis.

Angel & Innovation Finance. Following a strong Q4 last year which saw GC Angels invest £0.6m into 5 companies unlocking £1.2m into high innovation GM SMEs including two GIEC spin outs and a female FinTech company, GC Angels has focused on starting to raise a dedicated £30m fund to sustainably support the innovation gap in GM for the next 10 years. We now have over 230 GM opportunities that we are tracking and an integrated suite of partner advice for companies not yet ready to receive external funding. The portfolio is made up of 36 investments valued at £3.1m which has attracted £16.8m in additional capital. Over 40% of the companies are female founded and 25% founded by ethnic minorities. GC Angels has been accepted as an investor partner on to the Future Economy Programme by Innovate UK allowing access grants to develop innovative R&D projects.

Start Up Loans. During Q1 2023/24, GCBF issued 133 Start-Up Loans to the value of £1.89m in GM, and a further 230 loans across the UK under the new National Business Support Partner contract, we continue to work closely with the Growth Hub, integrating workshops and one 2 one support. GCBF are currently bidding on the next phase of the Northern Powerhouse Investment Fund (NPIF 2), targeting the Small Loan Funds NW Lot of £16m plus a reserve to be invested in SMEs from April 2024 for which GC is the current provider.

GM Bounce Back Loan Fund. Arrears on the GCBF book currently sits a little over 40%, a reflection of the more vulnerable customers the GM BBLs scheme targeted and the on-going impact of energy/cost of living crisis on these smaller businesses. While identification of initial fraudulent applications continues to be a key concern across the wider scheme, no further cases have been identified within the GM scheme at this time. Performance reflects the high risk of both the Scheme and the GM targeted SMEs but continues to be in line with expectations/tolerances as it stands.

GM Coronavirus Business Interruption Loans – All GM CBILS loans are now in the repayment phase, with only 1 GM funded CBILS loans in default. The current provision against this loan represents 13% of the total loan book, with the defaulting loan in the hospitality sector and experiencing key pressures.

INTERNATIONAL, MARKETING, AND INWARD INVESTMENT

Local Visitor Economy Partnership (LVEP). VisitEngland recently approved Marketing Manchester's application to become the LVEP on behalf of the city-region of Greater Manchester. The CEO of VisitBritain/VisitEngland, recently visited Manchester on a two-day fact-finding tour to be briefed on Greater Manchester's growing tourism offer. Her visit included tours of: Coop Live, Etihad Stadium, RHS Bridgewater, Science and Industry Museum and Aviva Studios/Manchester International Festival.

Accommodation Business Improvement District (ABID). Year 1 workstreams have been developed with input from ABID businesses. The first meeting to brief businesses on activity was held on 5 July with over 50 businesses represented. Bills for the first quarter have been issued and are due for payment by mid-July. Activity highlights include a new street cleaning programme which focuses on visitor arrival points; a new cohort of City Hosts who will be visible in the city to help visitors; and a marketing campaign to encourage short breaks during August.

Business Conferences and Events. In Q1 (Apr-Jun), 23 bids were submitted with a potential for 85,910 delegates and an economic impact of £114.7m. 9 bids were won in Q1 with an economic impact of £16.7m bringing 2,004 delegates/participants to Greater Manchester. The Sports Bidding Unit continues to bid for and support several high-profile sporting events that align with Manchester's sports strategy, including future tennis, basketball and cycling events.

Currently the pipeline is buoyant with 153 live opportunities, 22 bids are required, and 37 bids are pending decisions. To continue to raise the profile of Greater Manchester as a destination for business visits and events, the team attended IMEX Frankfurt on the VisitBritain stand week commencing 22 May, and had 45 appointments over three days, as well as attending a Corporate and Incentive MICE (Meetings, Incentives, Conferences and Events) Buyer dinner with 50 senior buyers in attendance and an Association Breakfast with 20 senior Association organisers. Follow up is now being done and 5 bids have been submitted. The team attended The Meetings Show in June, with 5 business tourism partners joining the Manchester stand. 66 appointments were conducted and leads are being followed up.

UKREiiF – 16-18 May 2023. Marketing Manchester coordinated GM's presence at UKREiiF taking place in Leeds. GM exhibited in partnership with Opportunity London to deliver a joint city presence at The Canary, a prime location venue at the event. 29 GM partners joined

the partnership from across public and private sectors. A total of 24 speaking opportunities for the GM delegation across the programme, including sessions on Atom Valley, Devolution, Transforming Transport and Levelling Up. The partnership was led by Bev Craig, Andy Burnham and Eamonn Boylan. A media partnership took place with Place North West and Estates Gazette. The total social media reach for the event was 2.4m with 37 pieces of coverage in the media providing approximately 14.5m opportunities to see.

Planning for UKREiff 2024 is underway, based on a return to the “Canary Bar” takeover shared with Opportunity London. Following feedback from partners, opportunities to add an evening event/dinner are being researched alongside standalone Greater Manchester curated sessions.

London Real Estate Forum (LREF) - 28-29 September 2023. Greater Manchester will return to LREF for a second time in 2023, as part of the year-round Invest Programme. Delegates from GM will take part in panel discussion and networking events.

Expo – 4-6 October 2023, Munich. GM will take a presence at the Expo Real event in October as part of a UK Cities collective. The event targets decision makers from the international property sector, focused on initiating new projects, closing deals & meeting new contacts.

SXSW – 8-16 March 2024. Planning for SXSW 24 is underway, with stakeholder engagement meetings scheduled for July. The first round of Panel Picker applications for speaker sessions is now open until October.

Place Partnership Programme. Building on the successful events of 2023, a promotional programme of real estate promotional activity and events will be launched in Jul/Aug to offer partners the opportunity to engage in a full year programme which includes MIPIM, UKREiff, London Real Estate Forum and Expo.

MIPIM – 14-17 March 2024. Following engagement with lead stakeholders MCC & GMCA, and a workshop session with partners from 2023, a decision has been made to build on the success of the 2023 event and return in 2024. Partner engagement will begin in July/Aug with a launch event in September.

Domestic Marketing

Domestic Short Breaks Campaign with JC Decaux, delivered in April and May, across key OOH sites throughout London. These in-kind placements delivered over 6.5m impressions across their network.

Manchester Flower Festival (June) – delivered a campaign promoting the Manchester Flower Show on behalf of CityCo. The campaign incorporated a mix paid media including Google search, social media and eCRM. In total this paid media delivered over 1.25m impressions, with 63k page views on Visitmanchester.com

Soccer Aid (June) – delivered an OOH campaign to target overnight stays focussed on the Soccer Aid match in Manchester. In-kind placements delivered 4.7m impressions across key sites throughout London.

International Marketing

GREAT Gateway Innovation Fund Campaign. The US GREAT campaign was delivered in June and July targeting 'Experience Seekers' in the New York tristate area in partnership with Aer Lingus and Visit Wales. The campaign incorporated the following elements:

- Expedia Campaign, utilising both onsite and offsite ads
- Sojern Campaign – Sojern is a travel marketing platform enabling MM to target travellers at the right time, in the right place during their travel planning journey. Full tracking via Sojern's 120+ data partners
- Influencer Campaign – hosted five travel influencers from the NY tristate in Manchester and onwards to North Wales. Followed up with amplification programme, with additional four influencers
- Google Web Stories Campaign – Numerous Manchester stories pushed out across Google surfaces such as Search and Display
- Radio Promotion – Manchester Campaign delivered across 3 Audacy radio stations in NY
- Press & Media Visits – Hosted 4 journalists throughout the months of May and June
- Aer Lingus – In-kind activity across web, PPC, social and in-flight entertainment
- Created new content – photography and film
- Final evaluation will take place in August

Follow up meeting with New York Tourism & Conventions. Agreed to deliver a city-to-city tourism partnership. Launch event scheduled for late October in New York alongside asset share.

Travel Trade

Manchester United US & Ireland Pre-season tour. Working in partnership with Manchester Airport, a programme of travel trade and media engagement is planned for July, events will take place in New York, Houston, Las Vegas and Dublin.

Media Relations. During Q1, 24 media have been engaged and 17 journalists hosted into GM on media visits. A media visit was scheduled in collaboration with the launch of MIF, which included media from key markets including USA, Japan, India, France, and Italy. Titles participating included GQ Japan (4.2m OTS), National Geographic South Korea, and Architectural Digest USA (7.7m). Media were also hosted from US titles including AFAR travel magazine (2m), LGBTQ+ Passport Magazine (100k), and freelancers writing for CNN, Travel + Leisure, in collaboration with Aer Lingus, and Singapore Airlines' in-flight magazine, SilverKris (1.2m).

Digital. Unique visitor numbers to the destination sites for Q1 23/24 was 824k with social reach at 3.1m. Digital campaign activity included generating Google Web Stories for the GREAT campaign, delivering paid and organic digital marketing to promote the Manchester Flower Festival and an organic social campaign to promote Marketing Manchester's attendance at The Meetings Show.

Sector / Thematic Campaigns. During Q1 City to Scale final campaign activity was delivered to complete the programme. As the ERDF funded sector marketing programme finished at the end of Q1, a new 23/24 sector marketing plan was developed in Q1 and will be implemented Q2 onwards.

Sector media and PR.

- In Q1, there were multiple PR announcements related to Greater Manchester's economy, trade and investment. These included new routes to Vegas from Manchester Airport, JP Morgan's investment in Manchester, the Nasscom MoU in partnership with MAG and MIP, and figures from DBT which showed Manchester topping the tables for FDI.

- As a result of huge media interest in India for the Nasscom MoU, the OTS for Q1 reached new heights of over 18m OTS media coverage. This was considered as a unique catapult innovation project in India resulting in national high profile coverage, hence very high OTS achieved. India media coverage was not included when KPIs were set, so noting that this will skew and significantly increase the OTS figure against target.
- Thought leadership opportunities were also arranged for sector representatives on topics such as UKREiiF, roundtables on tech and space with North West Business Insider and The Fintech Times, which resulted in positive coverage online and in print.
- To further position Greater Manchester as a leading city for investment, organic content was regularly published on the investinmanchester.com website, which included interviews with recent investors and sector insights related to attendance in Q1 at events including Money 2020, Advanced Materials Show and Medtech Japan.

Inward investment: MIDAS

Foreign Direct Investment Review. Lord Harrington is leading a review of foreign direct investment which will look to address the governance and operations of inward investment, including the Office for Investment, central and local partnerships, as well as the incentives for inward investment. The review will focus on digital technology, creative industries, life sciences, advanced manufacturing and green industries. Discussions are being had with the department on the review which is due to conclude Sept 2023. In response to the review, GC through MIDAS has directly inputted to Lord Harrington and in its Chair of the NPH T&I Officer's Group is working with the NP11 to formulate a Northern response to be shared with Lord Harrington by the end of July.

Shaping Future Activity. Initiating two pieces of strategic work to inform our market and sector priorities. These will provide an evidence base and focus for future targeted and proactive activity:

- **US Deep Dive:** Strategic deep dive research project on the USA to support the next stage of implementing the Greater Manchester International Strategy. This research will identify which cities, regions, and sectors in the US should be targeted, while also identifying secondary emerging opportunities for future years also reflecting the existing relationships that GM has developed in the US over several years.
- **Inward investment for advanced manufacturing and advanced materials.** We need to update our assessment of GM's comparative advantages and distinctive value

proposition to attract further advanced manufacturers, advanced materials, and low carbon firms into the city region. This research will address short term investment opportunities, including in markets like EV and mega factories, as well as the longer-term trends shaping international investment, such as net zero, supply chain redesign, and technology changes.

Results

- Year to date, there have been 11 successful inward investment projects and 274 jobs created. This year's YTD position is comparable to 2020/21 and 2021/22. It is behind the YTD position in 2022/23 (20 projects and 1,702 jobs), which was a significant 'catch-up' period for investors.
- Successes include 2 R&D projects. Of the total job created, 93% will be paid above the real living wage and 47% will be paid above £35,000. Although the target on the proportion of jobs paid above £35,000 is currently behind target, it is expected that this will be met over the year.
- The MIDAS pipeline has 47 projects and up 3,372 corresponding jobs with a strong-very strong chance of successfully closing this financial year. This includes 13 R&D, 14 HQ and 9 low carbon projects. MIDAS also continues to add projects to the existing pipeline and have begun engagement with 64 new projects so far in 2023/24.

Recent successes:

- **Wahed X.** Part of the US headquartered Wahed X, an ethical halal investment platform. This division is the private investment arm that funds ethical tech businesses using finance from a portfolio of HNW investors, creating 27 jobs.
- **JC Decaux.** As part of their strategic growth plans for the North of England and Scotland, JC Decaux are building out the partnerships team for Greater Manchester and the wider Northern region. Created 3 new roles and safeguarded 30 jobs. Project closed June 2023.
- **Zedify.** A zero-emissions logistics company, Zedify selected Manchester as the next phase of their UK expansion, creating 30 new jobs.

Examples of Current Project Pipeline:

- **Project Brooks.** US Battery Manufacturer looking for first international site for pilot production. 150 forecast jobs.
- **Project Fab.** A leading semiconductor manufacturer with plans to create a new Fab Plant to for next generation of compound semiconductors. Also include an R&D centre. 300 jobs.
- **Project Brew.** A Canadian Graphene manufacturer, who will be taking space at GEIC and then looking for pilot production facility in the next twelve months.
- **Project Blade.** Spanish-owned renewables manufacturer looking at UK&I footprint consolidation along with a training facility. Invest heavily in green skills training centre for installation, maintenance and servicing. 20 new jobs.
- **Project Magnitude.** US Headquartered company looking to establish a Quantum Centre of Excellence in the UK - 20 new Jobs.
- **Project UK Scale.** European Headquartered Digital Transformation company looking to establish a UK base in the North of England - 700 jobs.

ERDF Sectors Programme. Currently claimed 128 jobs and aiming to reach 150 jobs by end of September. The City to Scale film was launched in April 2023 and the social media campaign has been finalised in June 2023. The aim of this film is to showcase Greater Manchester as the destination for SMEs to be based, to grow, and to expand. Through creative film execution, Manchester is positioned as a vibrant city region and a market leading destination with a mature scale-up ecosystem that helps companies drive productivity and profitability.

Innovate Manchester Programme. The Innovate Manchester Programme has seen significant progress in its three collaborations between January 22 and July 23. Participants and large organisation Syngenta paired with SME Evidential. Syngenta will be showcasing Evidential products at a relaunch event on 17 July at their office in Manchester. Additionally, musicMagpie and Mintrace.ai have joined forces to explore the integration of SME technology into the broader business functions, whilst developing the operational efficiency of musicMagpie's kiosk systems. Moreover, Accenture has decided to move forward with Mouflon Software Solutions and is actively advancing the proposal together. While no university engagement has been established, MIDAS and BGH Innovation team are actively supporting the new collaborations between large companies and SMEs.

A film is being produced to highlight these collaborations due to be completed by the end of July 2023, showcasing the different stages of collaboration involving Accenture, Syngenta, musicMagpie, and Chiesi, as observed during phase 2.

Financial & Professional Services (FPS):

- In partnership with FinTech North and the Department for Business and Trade, MIDAS, joined Northern colleagues to represent the region on the UK Pavilion at Money2020 in June. MIDAS joined colleagues from Liverpool, Newcastle, and Leeds under the FinTech North banner, with a powerful collective voice to promote the north of England FinTech sector amongst some of the devolved regions as well as City of London.
- MIDAS were welcomed to Nexus Group at University of Leeds for the Northern Investment Event in June - 'Bringing London to the North'. Hosted by Novus Capital and NOTWICS, the session aimed to bring Northern start-ups and scale-ups together with London-based investors across the Tech, Manufacturing and Health sectors. This event is one step towards raising the profile of the investible opportunities in Greater Manchester and the North of England. This was the first of a series of events, the next one is set to be in Manchester.
- The FPS team presented at FinTech North's Leeds Conference on 29th June on a panel session which covered Greater Manchester's FinTech ecosystem and the joint collaboration with fellow northern counterparts at the Money 2020. Topics included the importance of FinTech within the region, including skills and devolution; the important roles the universities and other organisations play in enabling the strong growth of GM's FinTech sector in the last three years. This builds on MIDAS' collaborative work with Leeds to develop a joint proposition to attract FinTech innovators to the region.
- Manchester Law & Technology Conference in July hosted by The University of Manchester and partners to bring together the broad community of legal innovators in and around the Northwest to continue to grow knowledge and connections in the North-West LegalTech and Legal Innovation community.
- FPS team will attend The Digital Government Conference in September – this is a Public Sector Digital, Data and Technology profession event happening at Manchester Central. From its inception in 2013, it has quickly become the primary networking event for Central Government departments, Local Government authorities and the Healthcare Sector to announce new digital policy, showcase success stories and keep their fingers on the pulse of the latest technology innovations.
- MIDAS will attend Fintech Week 2023 Conference Day on 21st September 2023, a Manchester Digital event which is part of their first ever Fintech Week. The Conference will take place at No. 1 Circle Square.

- The CDT team attended London Tech Week on 12th & 13th June and met with key stakeholders, partners and FDI clients. The team were invited to a number of DBT events which helpful platforms to raise the technology profile of GM with DBT post and IST. CDT met with FDI prospects in Cyber and Quantum and met with the Western Australian Government, British Columbia and a Chilean Trade Delegation at their respective requests.
- The CDT team attended the Manchester Tech Forum on 15th June hosted by Roku at their offices and chaired by Barclays.
- Business France requested MIDAS' participation in a panel session to focus on GM's proposition at their French Cyber Day in advance of Infosec. The CDT team recruited a company based at DiSH to join the panel and Plexal also joined as a participant. The event was held in Canary Wharf on 19th June.
- The CDT sector head was invited to present at to Canadian Cyber delegation at Canadian High Commission in London on 19th June in advance of the delegation attending Infosec.
- The CDT team attended the Infosec conference in London focused on Cyber security on 20th June.
- Working in partnership with the Manchester India Partnership, CDT designed and delivered a two-day visit programme for a DBT Indian company delegation of 25 companies to GM on 21st and 22nd June, the delegation had been attending London Tech Week the week before. The programme included an introduction to GM ecosystem and stakeholders, speed networking and reception at Old Trafford, visit to UA92, presentation from Microsoft, civic breakfast with Lord Mayoress of Manchester and market entry session facilitated and hosted by DAC Beachcroft at their Spinningfield office. A number of projects were identified.
- On 22nd and 23rd June the CDT team organised and hosted a visit to GM by a Turkish Cyber inward investor.
- The CDT team worked with Manchester India Partnership on arranging and delivering an MOU signing between NASSCOM, Manchester Airport Group and MIDAS, announcing the first UK soft landing programme in GM on 28th June. The team had been able to share this with NASSCOM members participating in the previous week's delegation and when meeting with Indian companies interested in establishing in the UK, and the programme should deliver an uptick in Indian tech SMEs locating in GM.
- The sector heads of CDT and FPS exhibited and presented at Barclays North West Ecosystem Live Event at their refurbished Knutsford campus on 29th June.

- The CDT team organised and hosted an FDI visit to GM by an Irish Animation Company which was as a result of meeting the company in Ireland at the Dublin Tech Summit.
- The CDT team participated in a Business Insider roundtable at MediaCity on 5th July.
- The CDT sector head attended the techUK annual dinner presenting an opportunity to raise the profile of MIDAS and the recent NASSCOM announcement and gain insight from the West Midland's Tech Commissioner.

Life Sciences and Healthcare (LS):

- MIDAS attended the Medtech Japan event in April which led to further work and development of the approach and opportunities in the Japanese market. The Life Science team will be using this experience and bespoke developed marketing materials to expand the work undertaken.
- The LS team attended the Digital Health World Congress in London in May. The event focused on increasing use of digital tech in healthcare with particular focus on AI – massive impact on future diagnostic work and integral to future planning.
- In June, MIDAS supported the DBT team at the NHS Confed Expo in Manchester – this coincided with and included two Life Science focused delegations from Canada and Europe (including Ireland). The LS team also hosted welcome drinks and networking.
- The LS team will be attending the International Precision Medicine Conference in London in August. The event is focused on Genomics and precision medicine with particular emphasis on the use of data, biotechnology and AI to analyse volume data across large population health groups.
- Working on GM's Healthy Ageing HPO, the team attended the City of Longevity conference in Newcastle to look at developments in healthcare for ageing population.
- The LS team have commissioned a revision and update of a report by Ekosgen to support a biologics CDMO project and also to look at further opportunity and agglomeration that a facility of this type would bring to a specialised GM site.

Advanced Manufacturing and Materials (AM):

- Advanced Materials Show 28-29 June 2023 – one of the main Advanced Materials Shows in the UK. MIDAS attended and spent time on the Graphene@Manchester stand, set up a series of meetings prior to the conference and sourced some good quality leads from large and small companies interested in establishing in the UK and looking to join an established Advanced Materials cluster.

- Graphene Commercialisation Conference 27 June 2023 – organised by the Graphene Council, this one day event was attended by businesses working in the graphene sector. A project was sourced from a company who will be taking space at the GEIC and will be building a pilot production facility in 2024.
- Graphene Packaging event 13 July 2023 – in partnership with the Graphene Engineering Innovation Centre, MIDAS are delivering a half-day event looking at opportunities to innovation with graphene for packaging. Aimed at account management companies and inward investment targets, activity is expected to create innovation-led opportunities.
- DBT Food and Drink visit 14 July 2023 – following the Graphene Packaging event, MIDAS will host DBT's food and drink team for a half-day visit to showcase GM's assets to better inform the team and help them promote GM to their international networks.

Japan Steering Group

- Planning has commenced for the Mayoral mission to Japan, provisionally w/c 4th December 2023 – visiting Osaka & Tokyo. Sector focus will be Low Carbon, Life Sciences and Advanced Materials, and planning meetings have been held with DBT in Japan, Osaka Chamber of Commerce & Industry (OCCI), University of Manchester, DBT NPH Trade team, Osaka City officials and the office of the Governor of Osaka Prefecture.
- MIDAS have agreed with OCCI and DBT NPH Trade team to host two sector focused webinars in the Autumn to introduce OCCI members to the GM (& NPH Trade) opportunities as a prelude to the December visit and in-person meetings.
- Working with Account Managed companies, Japanese based live projects, and with colleagues in DBT in Japan the MIDAS team are lining up potential meetings for the visit.
- MIDAS are also liaising with Jo Ahmed, Honorary Consul of Japan in Manchester regarding business engagement and potential additional support in market.

Manchester China Forum (MCF)

- MCF co-hosted the Manchester visit for Incoming HM Trade Commissioner (HMTC) to China alongside with DBT Northern Powerhouse on 27 and 28 June. The incoming HMTC met with key stakeholders under the bilateral context in this region – including

University of Manchester, Manchester City Football Group, BCEGI, Manchester City Council, and FECIL as well as MAG during private dinner.

- Over the past two months, MCF attended the 6th China International Expo Road Show (UK) organised by China Chamber of Commerce in the UK (CCCUK) and the China-UK Local Economic and Trade Cooperation Qingdao Forum in London.
- MCF was invited to meet with the Hainan Vice Governor in Market Harborough. Hainan is an island located in southern China – it is a province of China aiming to set up free trade zone.
- MCF Executive Director has met with the Director General of Hong Kong Economic and Trade Office (HKETO) in London to discuss furthering collaboration between GM and Hong Kong, given the recent influx of BNO as well as increasing strategic importance of the city.
- MCF hosted the visit of Sinosynergy – a Chinese hydrogen fuel cell company interested in exploring local commercial opportunities to Manchester. The company met with representatives from MIDAS, MMU Fuel Cell Innovation Center, TfGM, and Carlton Power.
- MCF Executive Director attended the Great Britain China Center (GBCC) Senior Leadership Forum along with Paul Dennett, Deputy Mayor of GM and City Leader of Salford. This was the first time for GBCC extended an invite to a non-MP audience from this region.
- Manchester China Friendship Programme has continued its success in student engagement and integration. Over the past two months, the programme successfully organised several social events – Dragon Boat Festival celebrations at Salford Quays, Low-Carbon Chinatown event with the Manchester Museum, badminton competitions, and informal gatherings at local restaurants. MCF and Manchester China Institute are currently in the process of planning for next year’s programme.

Manchester India Partnership (MIP)

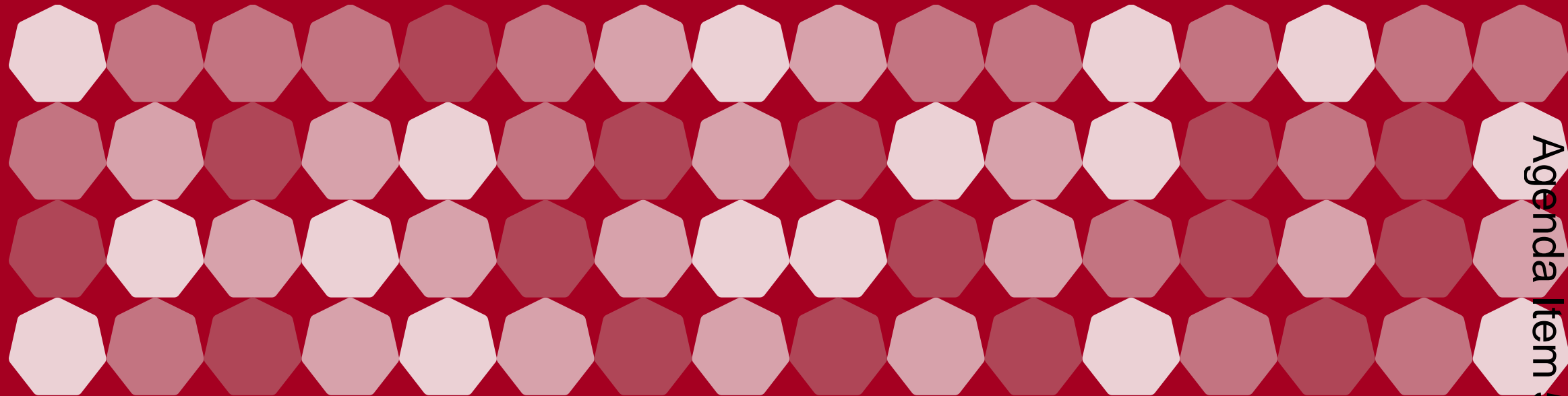
- MIP hosted a Department of Business and Trade delegation from India of tech companies in partnership with MIDAS sector team on the 21st and 22nd of June. A delegation of 25 tech companies travelled up to Manchester to gauge investment opportunities in the city region on the back of the London Tech Week. Feedback from the visit suggests GM is the top destination of choice outside London for the delegation.
- MIP has delivered a tripartite MOU with India’s premier business association for tech companies NASSCOM to offer 10 free desk spaces for a year at Manchester Airport’s

4m office space. The MOU was signed on the 28th June at the Deloitte offices in the presence of the Consul General Dr Shashank Vikram. As part of the NASSCOM Members establishment in the city region, MIP will connect them with key city-based stakeholders and network with other tech firms in the city region. 7 companies have expressed interest in establishing operations so far and the agreement will be functional from the 16th August. Similar NASSCOM agreements in Canada are estimated to create 200 jobs within 2 years.

- The Catapult Connected Places Net Zero Innovation Twinning Report has been successfully launched and follow up discussions between the GMCA and Catapult are ongoing around further cooperation on Net Zero Twinning Frameworks for other geographies. MIP will be convening a Greater Manchester and Bangalore Stakeholder online session in the near future to explore further opportunities.
- MIP will be supporting a CII led Graphene focused delegation which will arrive in September, details of this will be provided in the next 2 weeks. MIP has also contacted the Department for Business and Trade in India to gather information on upcoming outgoing delegations related to Net Zero.
- MIP will be exploring a broad strategy refresh and a re-examination of the GM value added proposition for India in the coming months to reflect recent changes in the organisation.

GM Foundational Economy Programme

Update for GM Business Board
19/07/2023



A Reminder: What is the Foundational Economy?

*The foundational economy is the part of the economy that supplies everyday but essential goods and services **needed for social and economic functioning and wellbeing and are part of the resilience systems that keep us safe and civilised.***

What Sectors does GM consider as the Foundational Economy?

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Private & Public Sector



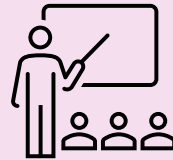
Health and Social Care



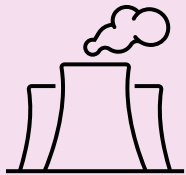
Early Years and Childcare



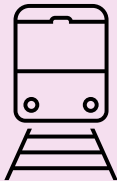
Public Administration



Education



Utilities and Infrastructure



Transport

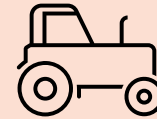


Housing

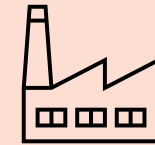


Communications

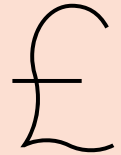
Private Sector



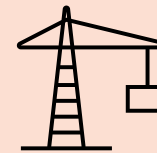
Agriculture and Fishing



Manufacturing
(foundation sectors)



Financial, Insurance and Real Estate Services



Construction



Retail



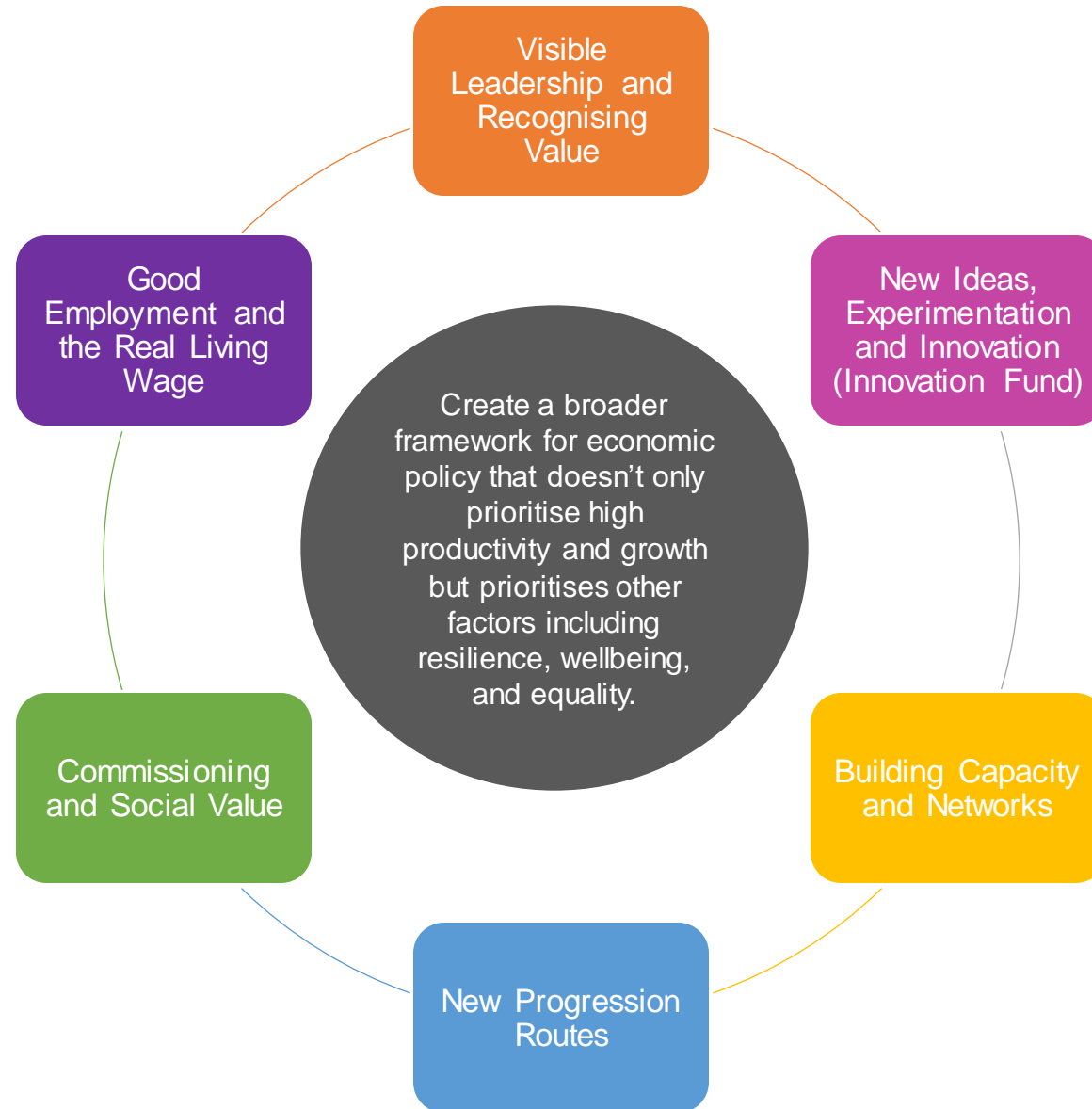
Hospitality, Leisure and Tourism

Why is the framing of the "Foundational Economy" Important

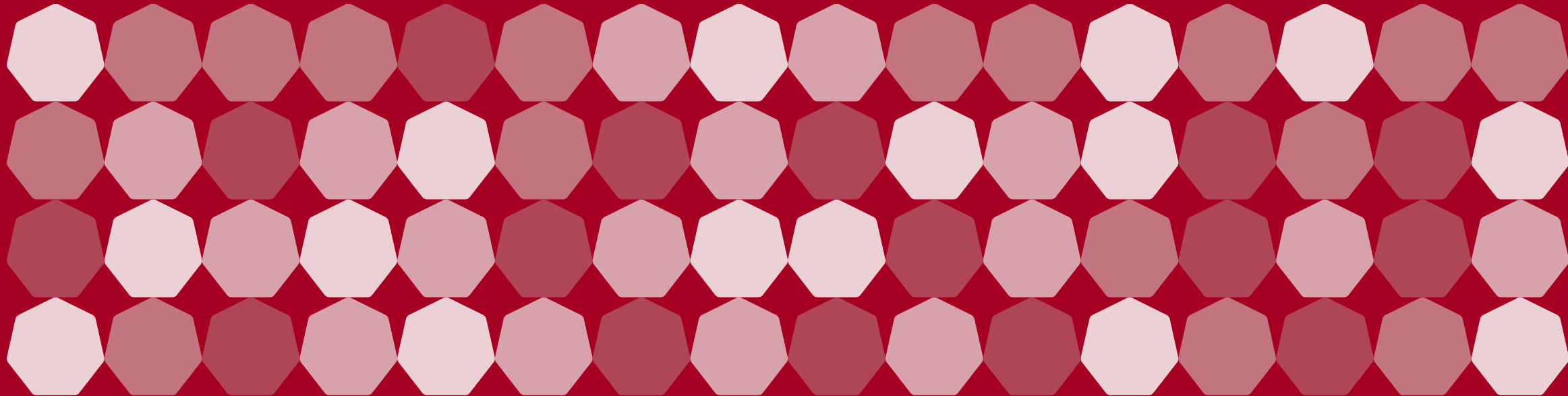
It is typically not the focus of Economic Policy

It underpins the functioning of the rest of economy

What action are we taking



Foundational Economy Innovation Fund



Project applications

Project must have a focus on at least 1 of the sectors selected for the fund and 1 challenge (any combination) in their application



Health and Social Care



Localising Supply Chains / Low Carbon and Net-Zero



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Early Years and Childcare (0-5)



More Effective Services & Products



Hospitality, Leisure and Tourism



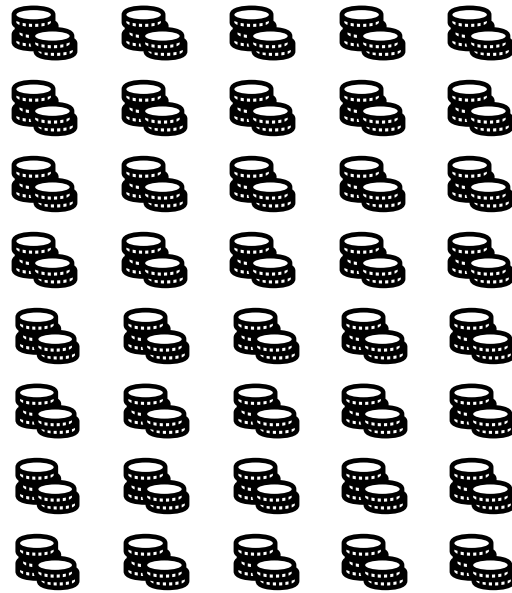
Supporting The Workforce



Local Retail and Personal Services

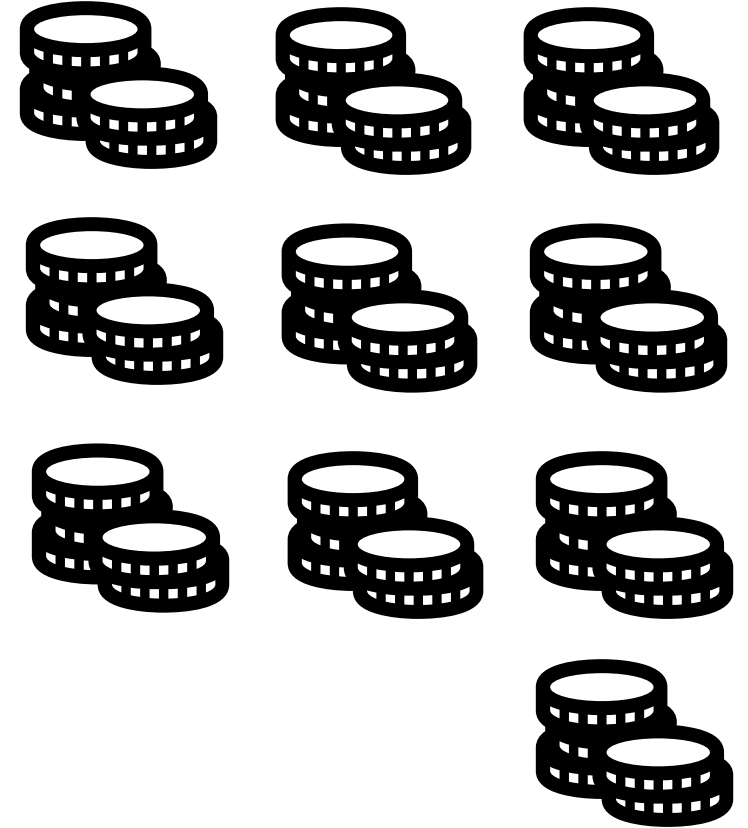
6 months to spend grant

40 projects awarded £10,000 at Phase 1 after formal application.



18 Months to spend grant

The best 10 projects will be awarded up to additional £60,000 following phase 1 and applying for Phase 2 funding.



Community of Practice

Creating a network and providing shared learning / network-building and peer support

Development Offer

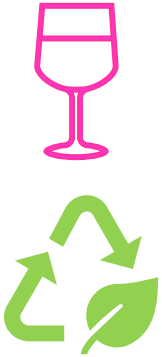
Focusing on skills in innovation, pitching and managing challenges

All projects to receive access to Development Offer and Community of Practice

Foundational Economy Innovation Fund: Status Quo

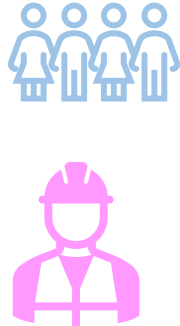
- **40 Projects** have now been selected and funding is currently in the process of going out to recipients
- **Project leads** are currently undergoing "innovation diagnostics" via the Development Offer to identify key challenges they might face in delivering their project, and where they are on their "innovation journey". Following this they will be referred to targeted support.
- An **evaluator** has also been procured and is planning **its activity** to ensure we maximise the learning from all elements of the programme.

Some Examples



Platform development to optimise stock deliveries via shared transportation between for small scale local food producers supplying retail and hospitality venues to reduce carbon emissions.

Pilot project for 'Austerity Retail' membership food hubs reliant on surplus/donated food (similar to food banks but with small subscription fee) to trial localised food production and new food hub income generation working with probation-supervised Community Payback Teams.



Novel engagement and training pathway trial utilising "Learning Through Play" approach with support to bring new parents, career changers and 50s+ into early years workforce.

Pilot implementation of digital solution to support multi-disciplinary teams providing care to residents with diabetes and other long term conditions in care homes.



Foundational Economy Innovation Fund: Next Steps

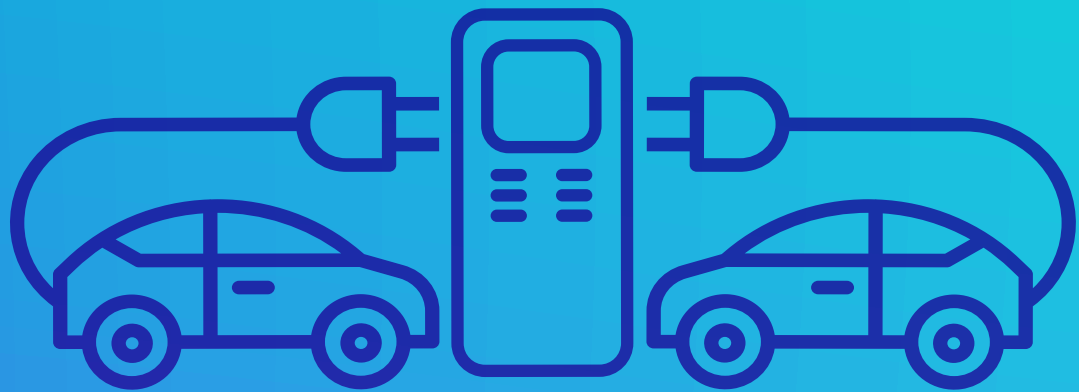
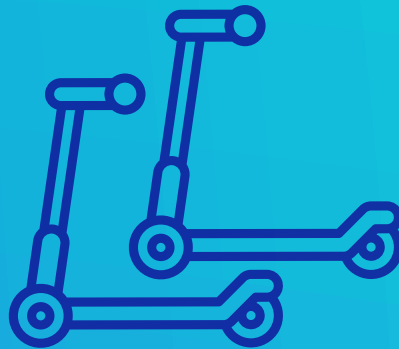
- **Working with project leads to finalise their individual objectives** – this is important as they will need to demonstrate progress made towards these with Phase 1 funding if applying for Phase 2 funding.
- Finalising the **process for assessing and awarding Phase 2** funding.

Any Questions?

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THANK YOU FOR SHARING

**The state of shared
and zero-emission mobility
in European cities**



This briefing was written by the Clean Cities Campaign, a campaign hosted by Transport & Environment.

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Transport & Environment

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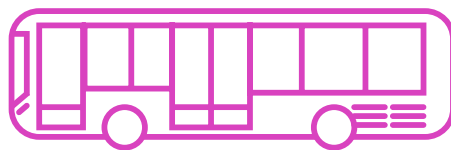
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ALLIANZ
FOUNDATION

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Executive Summary

Shared transport options have a number of advantages over individually owning them. Shared vehicles and infrastructure typically require less space, energy and raw materials, and therefore help tackle the climate emergency and toxic levels of air pollution. They are also often more affordable, which is particularly important in view of the cost of living crisis. Shared mobility solutions can, however, only achieve their full potential if they are zero-emission, minimising climate impact, energy use and noise.

The *Clean Cities Campaign* (CCC), a European coalition of 80+ civil society organisations campaigning for zero-emission urban mobility, therefore considers that shared, zero-emission mobility solutions should be an integral pillar of every urban transport system. As part of the campaign's efforts to promote mutual learning and a healthy race to the top, an analysis of 42 European cities has been carried out. In line with the campaign's vision, a broad definition of shared mobility has been applied, comprising the following zero-emission solutions that cities can typically shape through local policies:

- ▶ Shared bikes and e-scooters,
- ▶ Zero-emission buses,
- ▶ Shared electric cars,
- ▶ Public charging infrastructure for electric vehicles.

The data collection and analysis took place in the first quarter of 2023 with the help of the CCC's network and experts from global sustainability consultancy *Ricardo Energy & Environment*. Consolidated databases from specialised providers were used where possible. Each city and, where necessary, each operator was contacted to request the best available data. Details can be found in the accompanying [technical report](#).

Shared mobility can be a shortcut to future-proofing urban transport systems

The main results of the analysis are:

- ▶ **More than the usual suspects:** Although well-known urban transport leaders (such as Copenhagen, Oslo, Paris and Amsterdam) occupy the top positions, a number of cities that did not obtain high scores in the CCC's wider [urban mobility ranking](#) outperform their peers on shared, zero-emission transport (including Milan, Ljubljana, Budapest, Sofia and the Polish Tri-City). This indicates that shared mobility can be a shortcut to future-proofing urban transport systems as progress can rapidly be made with relatively limited public funding.
- ▶ **Political leadership makes the difference:** The wide variation seen in the results of otherwise similar cities points to the importance of local leadership. The best-performing cities are those where decision-makers set clear, strong objectives and make targeted investments.
- ▶ **Encouraging public transport trends:** Several cities, such as Oslo, Copenhagen and Amsterdam are on track to achieve zero-emission public transport by 2030.
- ▶ **Towards electric car sharing:** Zero-emission car sharing is being rolled out rapidly in many cities, including Oslo, Copenhagen and Amsterdam, but also in cities such as Ljubljana and Hamburg. On average, a higher percentage of shared cars is electric compared to privately owned cars.
- ▶ **Charging infrastructure gap:** The difference in the availability of (semi-)public EV charging infrastructure between the leaders (such as Amsterdam, Oslo, Copenhagen and Ghent) and the laggards represents about an order of magnitude. Many cities need to step up local policies to accelerate the roll-out.

The *Clean Cities Campaign* therefore calls on city leaders and governments to:

- ▶ **Acknowledge and use the full potential of shared and zero-emission solutions** as a shortcut to future-proof urban transport,
- ▶ **Provide and prioritise space and infrastructure for shared mobility by reallocating road space** to improve road safety and reduce conflicts between different user groups,
- ▶ **Roll out EV charging infrastructure** in a strategically planned way.

Position	City	Country	Shared bikes and e-scooters (out of 10)	Shared electric cars (out of 10)	Zero-emission buses (out of 10)	EV charging infrastructure (out of 10)	OVERALL SCORE (out of 40)	OVERALL SCORE (%)	GRADE	EXPECTED CHANGE*
1	Copenhagen	Denmark	7.3	10.0	7.3	10.0	34.6	86.5%	A	
2	Oslo	Norway	6.0	8.1	8.4	10.0	32.5	81.3%	A	
3	Paris	France	10.0	6.5	5.0	6.3	27.8	69.5%	B	▼ (60.8%)
4	Amsterdam	Netherlands	2.4	10.0	4.9	10.0	27.3	68.3%	B	
5	Hamburg	Germany	7.4	7.6	3.8	8.1	26.9	67.3%	B	
6	Helsinki	Finland	10.0	2.2	6.8	6.0	25.0	62.5%	B	
7	Milan	Italy	7.5	4.7	7.1	3.8	23.1	57.8%	C	
8	Lyon	France	8.5	5.0	4.2	3.0	20.7	51.8%	C	
9	Ljubljana	Slovenia	2.6	10.0	0.0	7.8	20.4	51.0%	C	
10	Lisbon	Portugal	10.0	0.0	0.6	9.3	19.9	49.8%	C	
11	Brussels	Belgium	10.0	3.1	1.2	5.5	19.8	49.5%	C	▼ (39.5%)
12	Antwerp	Belgium	6.3	2.8	0.2	10.0	19.3	48.3%	C	
13	Berlin	Germany	6.5	6.1	2.6	3.7	18.9	47.3%	C	
14	Cologne	Germany	7.7	2.6	3.9	4.6	18.8	47.0%	C	
15	Munich	Germany	7.1	3.7	0.8	7.0	18.6	46.5%	C	
16	Turin	Italy	5.0	2.4	3.4	5.5	16.3	40.8%	C	
17	Budapest	Hungary	3.8	3.5	2.8	5.7	15.8	39.5%	D	
18	Ghent	Belgium	2.2	3.1	0.3	10.0	15.6	39.0%	D	
19	Stockholm	Sweden	5.2	3.6	0.4	6.1	15.3	38.3%	D	
20	Sofia	Bulgaria	0.5	4.8	6.8	2.2	14.3	35.8%	D	
21	Strasbourg	France	1.6	2.2	5.6	4.4	13.8	34.5%	D	
22	Madrid	Spain	1.6	5.9	2.6	3.2	13.3	33.3%	D	▲ (35.3%)
23	Tri-City**	Poland	5.0	0.0	6.1	1.7	12.8	32.0%	D	▲ (38.5%)
24	Greater London	United Kingdom	1.7	0.5	5.3	5.0	12.5	31.3%	D	
25	Glasgow	United Kingdom	0.6	0.3	6.4	4.5	11.8	29.5%	D	
26	Krakov	Poland	5.7	1.2	3.3	1.3	11.5	28.8%	D	
27	Warsaw	Poland	6.4	1.0	2.7	1.3	11.4	28.5%	D	
28	Rome	Italy	3.7	1.5	1.1	4.1	10.4	26.0%	D	
29	Marseille	France	4.7	2.2	0.3	2.7	9.9	24.8%	D	
30	Prague	Czech Republic	2.7	1.8	0.0	4.0	8.5	21.3%	D	
31	Bucharest	Romania	2.1	2.3	3.2	0.8	8.4	21.0%	D	
32	Barcelona	Spain	2.9	0.1	1.9	3.3	8.2	20.5%	D	▲ (21.8%)
33	Vienna	Austria	1.8	0.6	0.7	4.6	7.7	19.3%	E	
34	Naples	Italy	1.3	0.9	3.0	1.3	6.5	16.3%	E	
35	Bilbao	Spain	0.9	0.0	2.3	2.7	5.9	14.8%	E	
36	Liège	Belgium	3.3	0.0	0.0	2.6	5.9	14.8%	E	
37	Valencia	Spain	1.5	0.1	1.1	2.6	5.3	13.3%	E	
38	Edinburgh	United Kingdom	0.0	0.5	0.6	3.8	4.9	12.3%	E	
39	Birmingham	United Kingdom	0.7	0.0	0.8	3.2	4.7	11.8%	E	
40	Granada	Spain	1.1	0.0	0.8	2.2	4.1	10.3%	E	
41	Dublin	Ireland	1.7	0.2	0.0	1.6	3.5	8.8%	F	
42	Greater Manchester	United Kingdom	0.4	0.0	0.5	2.4	3.3	8.3%	F	▲ (14.5%)

Table 1 – main results with score by category and overall results

* Expected revised overall score following major changes that have been announced/confirmed but not yet fully implemented

** Gdansk, Sopot and Gdynia

Introduction



Photo: Bastien Nvs / Unsplash

The *Clean Cities Campaign (CCC)* is a European coalition of more than 80 civil society organisations campaigning for zero-emission urban mobility by 2030. This report summarises research into clean shared transport solutions that was carried out in early 2023, with the help of the European network of the CCC as well as *Ricardo Energy & Environment*, a global sustainability consultancy. It provides a ranking of 42 major European cities based on indicators reflecting the state of shared and zero-emission urban mobility.

The following section explains why shared and zero-emission urban mobility solutions play a key role in the transition to climate-friendly, healthy and liveable cities, and summarises the aims of the research. This is followed by a brief overview of the methodology and a summary of key results and findings. The conclusions lead to a set of policy recommendations for cities, national governments and the European Union.

A detailed methodology and full results can be found in the accompanying [technical report](#) from *Ricardo Energy & Environment* that is available on the [CCC website](#).

Context and aim of the research

A triple challenge – and why urban transport matters

Cities and their residents are facing a triple threat from climate change, air pollution and the cost of living crisis.

Record-breaking summer heatwaves in 2022 caused at least 15,000 excess deaths across Europe¹, underscoring the need for urgent action to tackle the climate emergency. To have a chance of limiting the average global temperature increase to 1.5°C, emissions need to peak and reduce as soon as possible.

In Europe, around a quarter of greenhouse gas emissions come from transport, which is one of the only economic sectors in the EU where emissions today are higher than they were in 1990.²

Air pollution causes more than 275,000 premature deaths each year across Europe.³ It contributes to a huge range of health conditions, from asthma and heart disease to various cancers, potentially affecting every organ of the body.⁴ In 2021, 97% of the urban population in the EU was exposed to concentrations of fine particulate matter above safe levels.⁵ Transport is the main source of air pollution in European cities.⁶

In addition, the ongoing cost of living crisis affects the life and mobility of millions of Europeans, especially those in low-income households. As a consequence, many of them suffer from transport poverty⁷ - they are not able or struggle to afford and access transport options or are locked into 'forced car ownership'⁸ to get about their day to day activities.

Therefore, there is an urgent need to transition to a sustainable, affordable and people-centred

mobility system. The EU and national governments have set ambitious targets for reducing greenhouse gas emissions, air pollution and traffic fatalities – but progress is patchy.

With three out of four Europeans living in urban areas, cities are where these issues are the most critical – and where there is greatest potential for rapid transformation at scale. The high population density offers opportunities to roll out zero-emission shared mobility solutions – not just traditional and new forms of public transport, but

also shared bikes and e-scooters, (electric) car sharing and public charging infrastructure. Doing so will improve the health and quality of life for tens of millions of European citizens.

Shared mobility has become increasingly popular in the past few years. Throughout 191 cities in Europe, the data aggregator service Fluctuo counted on average around 150,00 shared bikes and 480,000 shared e-scooters in 2022.⁹ In its mobility barometer, INVERS estimates that in the first quarter of 2023, more

than 50,000 free-floating shared cars were available in Europe¹⁰, on top of which there is a fleet of more than 29,000 station-based car sharing vehicles.*

Likewise, the number of electric buses registered in Europe has increased six-fold from 2016 to 2021 to over 9,000 units¹¹, with electric buses accounting for 30% of the city bus market in Europe in the first half of 2022.¹² Equally, charging infrastructure for EVs has been rolled out at impressive speed, growing from 127,704 charging points in the first quarter in 2020 to 512,339 in the second quarter of 2023.¹³

* Estimate based on national car sharing association figures: 15,360 station-based car sharing vehicles in Germany (BCS 2023), 10,372 in France (AAA 2022), 1,229 in Italy (ONSM 2022) and 2,491 in Belgium (AD 2022) alone.

To tackle the climate crisis, improve people's health and wellbeing and create more equitable cities, zero-emission and shared mobility solutions are vital


The benefits of shared mobility and shifting to zero-emission mobility

Shared and zero-emission mobility solutions are integral to tackling our climate, air pollution and transport equity challenges. Modes of transport based on sharing are more efficient overall, reducing emissions, raw material demand and the use of scarce space in cities. They are often also more affordable. Car sharing, for example, is cheaper than owning a car for most user groups.

This research focuses on four crucial elements of shared, zero-emission urban mobility that city authorities have the opportunity to shape, using a broad definition of shared mobility that comprises public transport and public charging infrastructure:

- ▶ Micromobility – specifically **shared bikes, e-bikes and e-scooters** – complements walking and cycling, providing a low-carbon alternative that has the potential to replace many short car trips in cities.
- ▶ By replacing multiple individual cars, car sharing reduces emissions and space use, and **shared electric cars** ensure this form of mobility is as clean as possible.
- ▶ Public transport is already a more sustainable and low-carbon transport mode, but a clean, climate-friendly urban transport system requires a shift to **zero-emission buses**.
- ▶ Zero-emission cars – in particular electric vehicles – already perform significantly better than combustion engine cars when it comes to greenhouse gas and pollutant emissions, but their rollout depends on providing the necessary **charging infrastructure**.

Why is shared, zero-emission mobility an essential part of the solutions?

 Why shared?	
Reasons	Evidence (key figures & references)
<ul style="list-style-type: none"> ▶ Reduces car ownership and GHG emissions ▶ Space, energy and resource efficient ▶ More affordable ▶ More flexible (e.g. free-floating vehicles across cities) ▶ Popular among many user groups, including younger citizens and lower-income households 	<ul style="list-style-type: none"> ▶ Shared mobility, such as bike and car sharing, reduces the need to own and use private vehicles and devices and can therefore reduce carbon emissions, though the effect depends on the type of service and local context. ▶ Given that private vehicles tend to be unused and take up space during most of the day, shared mobility is more space efficient, which is particularly valuable in cities where public space is often limited. Similarly, the shared use and higher utilisation of vehicles makes them more energy and resource efficient. ▶ For many users and in many use cases, shared mobility is also more affordable than private ownership, as you only pay for its use, but have little to no upfront costs or financing. ▶ Shared mobility also has the benefit of being flexible (vehicles and devices can be found throughout the city when needed) and is also popular amongst groups that would otherwise rely on private cars or tend to be affected by transport poverty. ▶ The scientific evidence for these effects of shared mobility can be found in the references, see 14, 15, 16, 17, 18 19, 20



Why zero emissions?

Reasons	Evidence (key figures & references)
<ul style="list-style-type: none"> ▶ Climate protection ▶ Health protection ▶ Ecosystem protection ▶ Reduces costs ▶ Independence from fossil fuel imports 	<ul style="list-style-type: none"> ▶ Over its lifetime, an electric car in the EU emits on average three times less CO₂e* than an equivalent petrol car (from at least 37% to up to 83%).²¹ ▶ In 2020, road transport was responsible for 37% of nitrogen oxide emissions and 9% of fine particle emissions in the EU²² - zero-emission vehicles can drastically reduce air pollution.²³ ▶ Zero-emission vehicles generate less noise and air pollution (both in terms of particle matters and nitrous oxides) when compared to vehicles powered by internal combustion engines.²⁴ ▶ While the upfront costs of zero-emission vehicles are still higher than for the equivalent fossil fuel vehicles, the lower running costs result in net savings for the owner, even under pessimistic assumptions.²⁵ ▶ As with private cars, zero-emission buses have significantly lower greenhouse gas emissions throughout their lifetime.²⁶ While it will take a few more years for electric buses to cost the same as diesel buses, the overall lifetime costs might already be the same.²⁷ ▶ Shifting to zero-emission technology reduces Europe's dependence on foreign oil imports from authoritarian, human-rights abusing regimes.²⁸

Table 2 - Benefits of shared and zero-emission mobility

Why this city benchmark?

Some cities across Europe have made encouraging strides in these areas, but others are lagging far behind. In general, the potential of shared mobility is not fully appreciated by policymakers or society.

With this research, the *Clean Cities Campaign* offers an evidence-based overview of the state of shared and zero-emission mobility in 42 major European cities. Currently, no such overview exists. By providing a robust and transparent benchmark of cities' performance, the campaign aims to accelerate progress and help decision-makers identify actions they need to take to achieve zero-emission mobility by 2030.

The research complements the *Clean Cities Campaign's* wider [City Ranking](#)²⁹ published in 2022, which focused on space for and safety of active mobility, public transport affordability and accessibility, clean air, mobility policies and electric vehicle charging infrastructure. The present study is meant to encourage and inspire cities across Europe to step up their efforts to tackle climate change, air pollution and transport poverty and to create clean, people-friendly transport systems that are fit for the future.

* CO₂e = CO₂ equivalent, used to compare the emissions from various greenhouse gases on the basis of their global-warming potential (GWP), by converting amounts of other gases to the equivalent amount of carbon dioxide with the same global warming potential.

Overview of the methodology

Developing this ranking was a collaborative, transparent and stepwise process. While the data collection was led by the *Clean Cities Campaign* core team and *Ricardo Energy & Environment*, the CCC's network of local partners and experts were involved in developing the indicators and reviewing the findings. Cities and transport operators also contributed data, complementing data purchased from specialised providers (see below). Feedback from local partners and cities helped shape the research and the recommendations the *Clean Cities Campaign* has drawn from it.



Image 1 - Overview of the process followed

Indicator development

The choice of indicators was guided by the *Clean Cities Campaign's* vision for healthy, climate-friendly and liveable cities through zero-emission mobility by 2030. The indicators aim to represent the state of shared and zero-emission mobility. The CCC has prioritised clarity over complexity. Choosing practical, quantitative indicators inevitably has limitations, but the authors believe they illustrate key puzzle pieces that are essential for a successful transition to zero-emission mobility in cities. The fact that cities that are leading the way on the wider transition to zero-emission transport (as identified by the CCC's wider City Ranking) also perform strongly on shared, zero-emission transport (see below) confirms that there is a strong link between the two.

Shared, zero-emission mobility is not, however, sufficient in itself to deliver a clean mobility system, nor are the indicators intended to reflect every aspect of zero-emission mobility (such as walking and private transport).

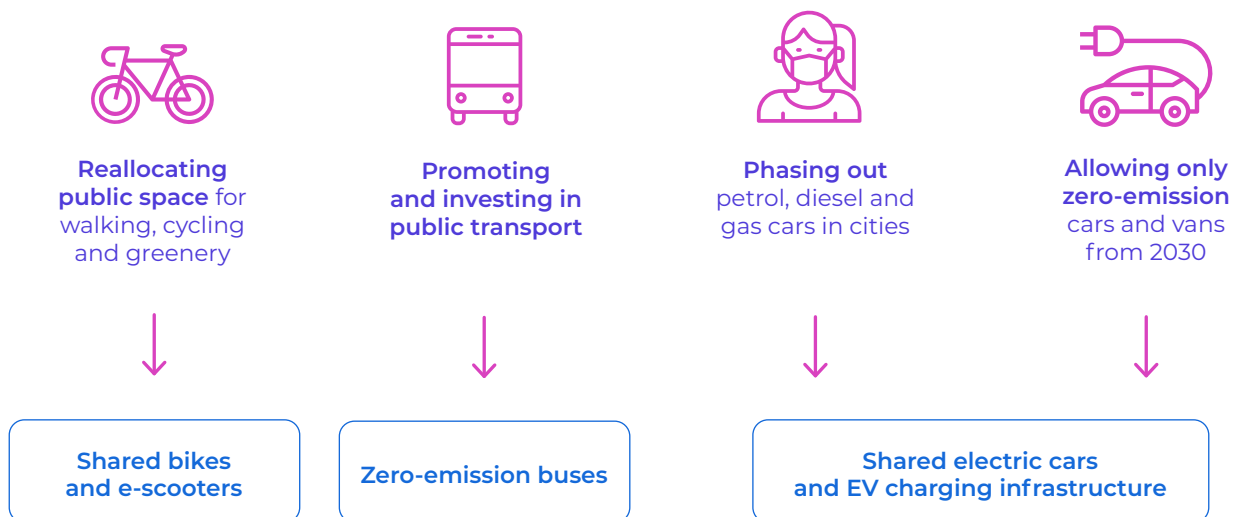


Image 2 - Alignment of the CCC objectives and the selected indicators

Indicator	Why it matters	Metric	Data source
Shared bikes and e-scooters	Shared e-scooters and (e-)bikes are a convenient way to get around in cities, complement public transport and have the potential to replace many short car trips with a cleaner, more climate-friendly mode of transport.	Number of shared e-scooters + (e-)bikes available per 1000 inhabitants	Fluctuo , city and operator data
Shared electric cars	Car sharing reduces the number of cars in cities; and shared electric vehicles make it as clean and climate-friendly as possible and reduce costs for users and cities.	Number of shared electric cars available per 1000 inhabitants	Fluctuo, city and operator data
Zero-emission buses*	Public transport is the climate-friendly backbone of mobility in most cities. Buses should fully switch to zero emission by 2030 at the latest as they minimise greenhouse gas and pollutant emissions, reduce noise and have become cost-competitive.	Share of the urban bus fleet that is zero-emission	City, public transport authority and operator data
EV charging infrastructure	Public and semi-public charging infrastructure are an essential part of the overall charging infrastructure for electric vehicles. It allows for charging during longer trips or for people that cannot charge at home or at work.	Publicly available charging power per 1000 inhabitants	Eco-Movement

Table 3 – Overview of the indicators, metrics and data sources

City selection

The CCC's wider City Ranking included 36 major cities from across Europe. The current research includes all these cities plus six more to give a total of 42.

We chose cities that have a prominent role in the debate on urban mobility in their countries and/or at a European level, while ensuring a broad geographical spread to represent the diversity of European cities. We prioritised countries and cities where the *Clean Cities Campaign* has an active presence, so that our local partner organisations can engage in a constructive dialogue with these

city leaders. We also chose cities where sufficient data was available, or could be obtained through contacts with city administrators.

The below table lists the 42 cities included in this study, together with the corresponding city area and number of inhabitants. The city area and population correspond to the municipality with the same name unless stated otherwise. Population size ranges between 195,278 for the smallest city (Liège) and 8,799,730 inhabitants for the largest city (Greater London).

* Defined as buses with no tailpipe emissions

City	City area (km2)	Population
Amsterdam	219.0	882,633
Antwerp	203.7	530,630
Barcelona	100.8	1,636,732
Berlin	891.8	3,677,472
Bilbao	41.3	344,678
Birmingham	268.0	1,140,525
Brussels (Brussels-Capital Region)	162.4	1,222,637
Bucharest	239.0	2,161,347
Budapest	1,044.9	1,706,851
Cologne	406.7	1,073,096
Copenhagen	93.6	644,431
Dublin	128.4	588,233
Edinburgh	273.0	527,620
Ghent	157.9	264,666
Glasgow	176.4	635,130
Granada	88.1	231,775
Hamburg	742.5	1,904,000
Helsinki	214.0	658,457
Krakow	326.8	802,583
Liège	68.4	195,278
Lisbon	84.7	545,923
Ljubljana	275.1	294,113
Greater London	1,595.2	8,799,730
Lyon	48.0	518,635
Madrid	604.9	3,305,408
Greater Manchester	1,276.9	2,848,286
Marseille	242.1	868,277
Milan	181.8	1,374,582
Munich	311.4	1,515,860
Naples	118.5	922,094
Oslo	480.8	702,543
Paris	105.4	2,175,601
Prague	496.3	1,301,432
Rome	1,285.8	2,823,000
Sofia	1,339.0	1,248,452
Stockholm	215.8	978,770
Strasbourg	78.3	284,677
Tri-city (Gdansk, Sopot and Gdynia)	418.4	763,690
Turin	130.1	858,205
Valencia	139.3	792,492
Vienna	414.9	1,914,743
Warsaw	517.2	1,863,056

Table 4 – City size by area and population

Data sources and quality

To create a credible ranking, the CCC sought to obtain robust, transparent and comparable data. Where possible, we used uniform Europe-wide datasets from specialised providers, such as Eco-Movement (on electric vehicle infrastructure and power, which is also used by the European Commission) and Fluctuo (on shared e-scooters, shared (e-)bikes and car sharing).

We contacted administrators from each city to request data and to receive feedback on the information received from data providers. Where necessary and possible, we also contacted public transport authorities, operators and service providers to request data and to receive feedback.

Data collection began in January 2023 and was completed by 14 April 2023. The results are based on the latest available data.* Subsequent significant changes were only incorporated if data was available before 12 May 2023, otherwise the results do not account for more recent developments. Where we are aware of any announced significant changes (notably on shared mobility), these are mentioned in the [technical report](#) and highlighted in the last column of the results table.

Scoring and grading

For each indicator, cities received a score between 0 (worst) and up to 10 (best) depending on their performance. The highest grade was awarded for any score corresponding to or exceeding a maximum value defined by the research team, taking into account the distribution of results and existing research on the subject to determine an appropriate threshold. The overall result sums up the individual scores for each indicator,** therefore ranging from 0 (worst) to 40 (best). Total results are also presented in percentages and converted into a school grade system, with A being the best and F being the worst grade.

A more detailed overview of the process, methodology, indicators and data sources, as well as a data quality rating for each indicator and each city, can be found in the accompanying [technical report](#) produced by *Ricardo Energy & Environment* which is available on the Clean Cities website.

* Data on shared mobility reflects the situation in Q1 2023. Data on EV charging infrastructure reflects the situation in January 2023. For zero-emission buses, the data ranges from 2021 to 2023, depending on the data source and the data provided by cities and operators.

** For EV charging infrastructure, public charging points (fully accessible 24/7) were weighted with 1.0, while restricted charging points (not accessible 24/7) were weighted 0.5. For the indicator on zero-emission buses, the share of zero-emission buses in the total bus fleet contributed 75%, and the number of zero-emission buses vehicles contributed 25%.

Results and key findings



Photo: Sustainable Bus

This chapter summarises the results and key findings. The table below gives an overview of the results and ranks the 42 European cities covered. Cities are ranked according to their combined score across the four indicators. We've also given each city an overall grade to reflect their current performance. Where we are aware of any announced significant changes (notably on shared mobility), these are highlighted in the last column, which provides an estimate of the future overall score once the change has been implemented. A more detailed overview of the anticipated changes can be found in the [technical report](#).

Our ranking provides important insights and new data on the state of shared and zero-emission urban mobility across Europe. While geographic location and income levels clearly had an influence, they were not the main factors affecting cities' performance.

Several Northern/Western European cities have a strong track record in sustainable urban mobility overall, and these cities also tended to score highly on shared, zero-emission services. The top four cities – Copenhagen, Oslo, Paris and Amsterdam – were all in the top five of the [wider CCC City Ranking](#). But not all the high performers fell into this category. There was a strong overall showing from several cities in Southern and Eastern Europe, with Ljubljana and Lisbon making the top 10.

Position	City	Country	Shared bikes and e-scooters (out of 10)	Shared electric cars (out of 10)	Zero-emission buses (out of 10)	EV charging infrastructure (out of 10)	OVERALL SCORE (out of 40)	OVERALL SCORE (%)	GRADE	EXPECTED CHANGE*
1	Copenhagen	Denmark	7.3	10.0	7.3	10.0	34.6	86.5%	A	
2	Oslo	Norway	6.0	8.1	8.4	10.0	32.5	81.3%	A	
3	Paris	France	10.0	6.5	5.0	6.3	27.8	69.5%	B	▼ (60.8%)
4	Amsterdam	Netherlands	2.4	10.0	4.9	10.0	27.3	68.3%	B	
5	Hamburg	Germany	7.4	7.6	3.8	8.1	26.9	67.3%	B	
6	Helsinki	Finland	10.0	2.2	6.8	6.0	25.0	62.5%	B	
7	Milan	Italy	7.5	4.7	7.1	3.8	23.1	57.8%	C	
8	Lyon	France	8.5	5.0	4.2	3.0	20.7	51.8%	C	
9	Ljubljana	Slovenia	2.6	10.0	0.0	7.8	20.4	51.0%	C	
10	Lisbon	Portugal	10.0	0.0	0.6	9.3	19.9	49.8%	C	
11	Brussels	Belgium	10.0	3.1	1.2	5.5	19.8	49.5%	C	▼ (39.5%)
12	Antwerp	Belgium	6.3	2.8	0.2	10.0	19.3	48.3%	C	
13	Berlin	Germany	6.5	6.1	2.6	3.7	18.9	47.3%	C	
14	Cologne	Germany	7.7	2.6	3.9	4.6	18.8	47.0%	C	
15	Munich	Germany	7.1	3.7	0.8	7.0	18.6	46.5%	C	
16	Turin	Italy	5.0	2.4	3.4	5.5	16.3	40.8%	C	
17	Budapest	Hungary	3.8	3.5	2.8	5.7	15.8	39.5%	D	
18	Ghent	Belgium	2.2	3.1	0.3	10.0	15.6	39.0%	D	
19	Stockholm	Sweden	5.2	3.6	0.4	6.1	15.3	38.3%	D	
20	Sofia	Bulgaria	0.5	4.8	6.8	2.2	14.3	35.8%	D	
21	Strasbourg	France	1.6	2.2	5.6	4.4	13.8	34.5%	D	
22	Madrid	Spain	1.6	5.9	2.6	3.2	13.3	33.3%	D	▲ (35.3%)
23	Tri-City**	Poland	5.0	0.0	6.1	1.7	12.8	32.0%	D	▲ (38.5%)
24	Greater London	United Kingdom	1.7	0.5	5.3	5.0	12.5	31.3%	D	
25	Glasgow	United Kingdom	0.6	0.3	6.4	4.5	11.8	29.5%	D	
26	Krakow	Poland	5.7	1.2	3.3	1.3	11.5	28.8%	D	
27	Warsaw	Poland	6.4	1.0	2.7	1.3	11.4	28.5%	D	
28	Rome	Italy	3.7	1.5	1.1	4.1	10.4	26.0%	D	
29	Marseille	France	4.7	2.2	0.3	2.7	9.9	24.8%	D	
30	Prague	Czech Republic	2.7	1.8	0.0	4.0	8.5	21.3%	D	
31	Bucharest	Romania	2.1	2.3	3.2	0.8	8.4	21.0%	D	
32	Barcelona	Spain	2.9	0.1	1.9	3.3	8.2	20.5%	D	▲ (21.8%)
33	Vienna	Austria	1.8	0.6	0.7	4.6	7.7	19.3%	E	
34	Naples	Italy	1.3	0.9	3.0	1.3	6.5	16.3%	E	
35	Bilbao	Spain	0.9	0.0	2.3	2.7	5.9	14.8%	E	
36	Liège	Belgium	3.3	0.0	0.0	2.6	5.9	14.8%	E	
37	Valencia	Spain	1.5	0.1	1.1	2.6	5.3	13.3%	E	
38	Edinburgh	United Kingdom	0.0	0.5	0.6	3.8	4.9	12.3%	E	
39	Birmingham	United Kingdom	0.7	0.0	0.8	3.2	4.7	11.8%	E	
40	Granada	Spain	1.1	0.0	0.8	2.2	4.1	10.3%	E	
41	Dublin	Ireland	1.7	0.2	0.0	1.6	3.5	8.8%	F	
42	Greater Manchester	United Kingdom	0.4	0.0	0.5	2.4	3.3	8.3%	F	▲ (14.5%)

Table 5 – main results with score by category and overall result

* Expected revised overall score following major changes that have been announced/confirmed but not yet fully implemented

** Gdansk, Sopot and Gdynia

We also found that:

- ▶ Shared mobility is evolving rapidly – this is reflected in significant variations between cities, including fluctuating fleet sizes and different forms of regulation.
- ▶ Several cities are on track to achieve zero-emission public transport by, or even before, 2030, showing the way forward for others.
- ▶ Zero-emission car sharing is being rolled out rapidly and is growing in many cities, but car sharing is still dominated by combustion engines.
- ▶ Cities are ramping up provision of electric charging infrastructure, but levels of ambition differ strongly throughout Europe.



Shared bikes and e-scooters

There was significant variation between cities in the numbers of shared bikes, e-bikes and e-scooters available. While in some cities there are more shared bikes, in others there are more e-scooters, providing a range of choices that can lead to good results.

Paris, Copenhagen and Milan have the most shared bikes per capita, while Helsinki, Lisbon and Brussels have the most shared e-scooters. Helsinki, Lisbon, Brussels and Paris all offer more than 20 bikes or scooters per 1,000 inhabitants* – although Parisians recently voted to ban shared e-scooters. Edinburgh was the only city in the ranking with currently no shared bikes or scooters at all.

* Following a non-binding referendum in April 2023, the mayor of Paris announced that shared e-scooters operators will have to cease operating from September 2023. In the Brussels-Capital Region, the government has published plans to tender the operation of shared e-scooters and e-bikes and to limit the number of shared e-scooters to 8,000 (down from currently around 21,000).

British and Spanish cities (except London and Madrid) performed poorly in this category, perhaps due to the existing mobility culture as well as regulatory challenges. In the UK, for example, e-scooter rental schemes are only being trialed.

Fleet sizes are fluctuating rapidly. This is partly due to seasonal variations (the data collected reflects the winter period for most cities), but is also influenced by regulatory changes and market dynamics as different operators move in and out of cities.

Shared electric cars

Copenhagen, Amsterdam and Ljubljana offer the most vehicles for electric car sharing per capita. Larger cities where there are more potential shared car users also did well, including Paris, Berlin, Hamburg, Madrid and Milan.

Cities that have a long history of car sharing and have promoted it strongly, such as Amsterdam and Hamburg, tended to score highly. But some cities have leapfrogged their way up the ranking by encouraging shared electric cars.

Ljubljana, Sofia, Milan and Budapest notably outperformed their peers. By contrast, seven cities scored zero for this indicator. In particular, cities in Spain (outside Madrid) and the UK are lagging behind.

The data collected in the 42 cities suggests that the percentage of electric vehicles is generally higher amongst shared cars than privately owned cars.





Photo: Angelo Abeer / Unsplash

Zero-emission buses

Since being introduced for regular service in the early 2010s, electric buses are now rapidly being deployed throughout European cities. Several cities are on track to have a 100% zero-emission bus fleet by 2030.

Oslo is leading the race: two-thirds of its bus fleet is currently electric, and its entire fleet will be zero emission by 2028. In absolute numbers, by far the most electric buses are found in London (>900) and Paris (>650). But the top 10 cities for this indicator also include some more unexpected names, including Sofia, Milan, Glasgow and the so-called Tri-city of Gdańsk, Gdynia and Sopot in Poland. These cities maintained their existing trolleybus networks (Sofia, Milan, Tri-city) or made an early choice to invest in electric buses (Milan, Glasgow).

Cities that backed alternative, non-zero emission technologies performed less well. These include hybrid diesel-electric, methane (CNG) and biodiesel buses. With the exception of London and Glasgow UK cities (Manchester, Birmingham, Edinburgh) performed poorly,* as did the Belgian cities with the exception of Brussels (Ghent, Antwerp and Liège). Three cities – Dublin, Liège and Ljubljana – did not have a single zero-emission bus in their fleet.

* Starting in September 2023, local buses in Greater Manchester are being brought back under local control, and operators in both Greater Manchester and Birmingham have purchased significant numbers of electric buses that will be delivered within the next year, which will improve their position in the ranking. The revised score is presented in the table under the column 'Expected change'.

Electric vehicle charging infrastructure

Electric vehicle charging infrastructure was one of the indicators that was also included in the CCC's wider [City Ranking](#). Since then, there has been an overall increase of charging stations and power in all cities, but little change in their relative performance.

Amsterdam and Oslo led this category by quite some distance: second-placed Oslo has almost 50% more charging capacity per person than third-placed Copenhagen. Ghent and Antwerp also scored highly.

Beyond Northern Europe, Lisbon and Ljubljana performed impressively. But cities in Poland, Spain and Italy – highly motorised countries – are falling behind in the rollout of electric vehicle infrastructure.

Photo: Ernest Ojeh / Unsplash



Conclusions and policy recommendations

Photo: Victor Keri / Unsplash



Liveable, healthy, low carbon and future-proof cities come in different shapes and forms, but shared and zero-emission mobility will be an integral part of all of them. Our research shows that **some cities are making impressive progress – but there is a long way to go.**

The wide range of results revealed **big and surprising differences, even among otherwise comparable cities.** Many of Europe's major cities are still a long way from providing their citizens with the shared, zero-emission services necessary to enable the switch to a clean, zero-emission, people-friendly urban transport system.

Given the ever-increasing cost of failing to address the climate, air pollution and road safety challenges faced by cities in Europe, this is worrying. Overwhelming evidence shows that **the social, public health and environmental benefits of transforming our cities far outweigh the costs.**³⁰

³¹ Cities must change gear and accelerate this transition.

The wide variation seen in the results reflects the **importance of local leadership.** The four indicators used in this study represent solutions that are under the control of city authorities. The

best-performing cities are those where decision-makers set clear, strong objectives and continue to work towards them. **Political will and persistence are as vital as funding and expertise.**

The *Clean Cities Campaign* hopes this ranking will help city leaders to benchmark their performance in these key areas and encourage a “race to the top”. As for the 2022 City Ranking, **obtaining data and information at city level was challenging:** data availability is limited and the quality is variable, as was the speed with which organisations were able to share it. Organisational silos as well as lack of funding mean that information is often not readily available. This is not just a problem for researchers: city authorities themselves often seem unaware of the exact state of mobility services in their own city. Urban mobility indicators at EU level could aid monitoring and evaluation, as well as research and decision-making.

We call on city leaders to be more ambitious, to take inspiration and learn from each other to strengthen shared, zero-emission mobility solutions. By transforming urban mobility systems, we can make our cities more liveable, improve people's health and protect our climate.

Policy Recommendations

- 1) **Acknowledge and use the full potential of shared and zero-emission solutions as a shortcut to future-proof urban transport**
- 2) **Provide and prioritise space and infrastructure for shared mobility by reallocating road space to improve road safety and reduce conflicts between different user groups**
- 3) **Roll out EV charging infrastructure in a strategically planned way.**

Overall, the most important recommendation is that the potential of shared and zero-emission transport as a fully-fledged mode of transport should be acknowledged and fully exploited through policy changes.

Shared mobility can be a shortcut to future-proof urban transport systems. City leaders should acknowledge and leverage the potential of shared, zero-emission transport, be more ambitious and learn from each other.

To do so, the following measures should be made a priority at different levels of governance:

Cities:

- ▶ **Provide and prioritise space and infrastructure for shared mobility** – including drop zones, cycling infrastructure, bus lanes, charging stations and parking for car sharing, as well as e-mobility hubs. This will also help **avoid conflicts between pedestrians, cyclists and e-scooter users.**
- ▶ **Regulate and enforce regulation of shared micromobility** in cooperation with users, civil society, people with reduced mobility and operators.
- ▶ **Make the electrification of the bus fleet**

a priority and set ambitious targets, in cooperation with public transport authorities and operators.

- ▶ **Accelerate the roll-out of electric charging infrastructure** based on forecast demand and the supply of private charging infrastructure, while making sure that road space rather than the pavement is repurposed.

National governments:

- ▶ **Provide a flexible legal framework for cities to roll out and regulate shared mobility** in accordance with local needs on the basis of uniform principles such as road safety, tendering rules, etc.
- ▶ **Provide funding and support for the ongoing electrification of the bus fleet** to public transport authorities and operators.
- ▶ **Support the strategic roll-out of electric vehicle charging infrastructure in cities** through planning and permit laws and with funding and financial incentives, aiming to go beyond European requirements for vehicle charging infrastructure.

European Union:

- ▶ **Make Sustainable Urban Mobility Plans (SUMP) binding for all urban nodes on the Trans-European Transport Network (TEN-T)** and include shared mobility more prominently.
- ▶ **Make EU funding for cities conditional on the switch to zero-emission mobility, including shared mobility**, and phase out all investments into fossil-fuel-based infrastructure or services.
- ▶ **Revise the EU's Sustainable Urban Mobility Indicators (SUMI) to make them easier to use and comparable** and to include data on traffic performance and emissions (e.g. total number of vehicle-kilometres, tonnes of CO₂ equivalent).

Shared mobility can be a shortcut to future-proof urban transport systems. City leaders should acknowledge and leverage the potential of shared, zero-emission transport, be more ambitious and learn from each other.

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Find out more

The Clean Cities Campaign is a European coalition of organisations hosted by Transport & Environment. Together, we aim to encourage cities to transition to zero-emission mobility by 2030 and to become champions of active, shared and electric mobility for a more liveable and sustainable urban future.

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Greater Manchester Business Board (LEP)

Date: 19th July 2023

Subject: Green City Region Partnership Update – Q1 (Apr - Jun 2023)

Report of: Steve Connor, GM Business Board (LEP) Lead for Net Zero

PURPOSE OF REPORT

The report provides the usual update on progress of the Green City Region Partnership for the first quarter of 2023/24 and key milestones for the second quarter.

RECOMMENDATIONS:

The Business Board is recommended to:

1. Note and comment upon the progress outlined in this report and latest position set out in the dashboard attached at:
 - a. Annex 01 (5 Year Environment Plan Performance Overview) and available online at: [Five Year Environment Plan \(2019-24\) Progress \(ghtableau\)](#).

CONTACT OFFICERS:

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1. OVERVIEW OF PROGRESS

The update at Annex 01 (5 Year Environment Plan Performance Overview) contains a summary of key progress across all areas within the 5 Year Environment Plan. During the last quarter. There are a number of key successes to be highlighted, set out below:

1.1 Energy

- Local Area Energy Plans (LAEPs) – A Phase 1 feasibility report, exploring the social (non-technical) barriers to net zero, has been developed and submitted to Innovate UK.
- DEEP Phase 3 (Heat and Energy Network Opportunity Areas) – First regional Heat Network meeting held with the 5 Districts that are currently at detailed project design stage. Bolton and Oldham are progressing with their designs. Remainder due to be procured.
- Go Neutral Smart Energy Framework – Contracts awarded for Rochdale and Stockport (ERDF) schools solar PV projects (0.6MW) and Wigan's (ERDF) leisure centre roof mounted solar PV scheme (c. 300kW). Two of Stockport's schemes have been installed with the rest due to be completed by September 2023. Workshop held, and action plan agreed for remaining shortlisted sites for Rochdale. Consultancy support (Wave 2) appointed to support Bury, Oldham, Salford, Wigan and GMCA Waste Dept with reviewing sites and bringing forward a portfolio of opportunities to market. Commission is expected to complete in March 2024.
- Smart Energy – Schools solar PV engagement guide published and discussions underway with NHS and other sectors on how this can be repurposed. Outline scope of schools solar PV offer developed with Districts. Work ongoing to develop the detail, with a view to having the offer in place by October 2023. Initial discussion held with Department for Education (DfE) to discuss potential collaboration opportunity.
- Energy Innovation Agency (EIA) – Work continues to refine the business model for post year 2 funding, this includes the addition of new funding partners and the revised shape and size for the EIA. Funds have been secured from the Greater Manchester Innovation Accelerator and new marketing collateral has been developed to promote the work of the EIA to innovators and potential buyers.
- Trafford Energy Park - Confirmation of shortlisting and updated information submitted to UK Department for Energy Security & Net Zero (DESNZ). Amendment approved to increase initial hydrogen production facility to 15MW and to vary the pipeline from natural gas to hydrogen. Schroders Greencoat and Carlton Power have formed the Green Hydrogen Energy Company Ltd (GHECO) to accelerate development of green hydrogen projects in Trafford (Greater Manchester), Barrow-in Furness (Cumbria) and Langage (Devon). This includes an initial funding commitment of £200million.

1.2 Buildings

- Social Housing Decarbonisation Fund (SHDF) – Wave 1 retrofits nearing completion and project close-down process begun. Wave 2 activities commenced.
- Public Sector Decarbonisation Scheme (PSDS) – Grant funded element (£11.1m) of PSDS 3a programme successfully completed across twenty projects. Four delivery partners have completed works, the remaining three are due to complete by April 2024. PSDS 3b programme underway. Consultancy commission for PSDS pipeline development activity ongoing with site surveys complete (44 buildings) and technical reports being finalised.
- Retrofit GM (Your Home Better) – Year two milestones agreed and direct mail programme to Greater Manchester residents complete. Current Solar PV and Battery Pipeline is £200k with the value of fabric works to follow on support with Your Home Better at circa £275k. Engagement has commenced with Your Home Better clients (delivered by Salford University) to further understand what consumers want.
- Local Energy Advice Demonstrator (LEAD) awarded (£1.9m grant programme funded by North West Net Zero Hub over 2 years) to bring together the regions ECO 4 Flex programme (Fuel Poor) and Your Home Better (Willing to Pay) with energy advice to ensure an end-to-end offering.
- ECO4 flex scheme (support for fuel poor/low-income households with home energy efficient upgrades) – Marketing activities commenced. Web portal to enable eligible households to be referred for the scheme has been developed and tested. [Press release](#) and [installer blog](#) issued.
- Net zero new development – Detailed Greater Manchester net zero standard agreed.
- Good Landlord standard and enforcing Minimum Energy Efficiency Standards (MEES) – The Good Landlord Scheme trainee programme is operational with ten trainees recruited across each District. The Regulatory Compliance Officer apprenticeship commenced in May 2023.

1.3 Transport

- Active Bee Network - Network audit complete. Geographical Information System (GIS) work is ongoing to combine audit data with current programme mapping to enable full network delivery figures and forecasts to be produced.
- Bike Hire Scheme – Average of 387 available bikes in June 2023. Drop due to rise in antisocial behaviour since Easter.
- E-hubs pilot - The pilot demonstration phase of the e-hubs project finished in December 2022. Currently exploring potential of further hub trials to increase network and wider roll-out of a Greater Manchester wide car club offer. The first phase will be a group of pilot sites in Salford, using co-located e-scooters and cycle hire bikes to create light touch Mobility Hubs.
- Bus franchising - Go North West and Diamond Buses fully engaged and mobilising ready for commencement of Tranche 1. First batches of zero emission buses have been delivered and preparation to electrify the Bolton depot is underway. Several

existing buses in the area have been branded to familiarise the public with the Bee Network brand. Tranche 1 schools contracts awarded to Stagecoach and Vision. Pre-planning application submitted to Stockport MBC for electrification of Stockport depot. Non-bus zero emission fleet delivery and infrastructure installation is progressing.

- Streets for All - Final draft of Streets for All guide to be circulated to Districts by end of June 2023 for review and comment.
- Clean bus fund - Currently 95% of buses awarded retrofit funding have been upgraded. Overall, the Greater Manchester based bus fleet will be circa 92% compliant once all planned retrofits and replacements have completed in the next 6 months.
- Electric Vehicle Charging Infrastructure (EVCI) - Discussions being held with Office for Zero Emissions Vehicles (OZEV) relating to Local Electric Vehicle Infrastructure (LEVI) funding to support EVCI delivery.
- Taxi EVI project (dedicated rapid charging points) - As of June 2023 most of the 120 charging points have been installed. Charging points at Parkway and Walkden Park and Ride now commissioned. Etihad charging point installed and commissioned and one further site in Marple to be installed (4 additional connectors).

1.4 Sustainable Consumption and Production

- Invitation to tender issued to support profiling of GMCA's scope 3 emissions including spend and investment carbon impact analysis and development of an action plan/toolkit to reduce carbon emissions.
- Bee Net Zero – questionnaire sent to 400 GM businesses to assess their state of readiness to be on a path towards net zero by 2038.
- Expressions of interest submitted to Sustain for GMCA to become a regional partner to support a 'Good Food for All' approach in Greater Manchester.
- Consumer behaviour insights - Work commenced with initial focus groups, digitally excluded interviews and online quantitative survey completed.
- Single-Use Plastics – Work programme agreed. GMCA and Manchester City Council committed to becoming a Refill Destination with support package in place from City to Sea. [Press release](#) issued on World Refill Day. Dedicated webpage for forthcoming [single-use plastic ban](#) published on GMGreenCity website, PlasticFreeGM factsheets updated, and social media toolkit developed and circulated to Districts.
- Greater Manchester Sustainable Textiles and Fashion - Funding application submitted to UKRI's circular fashion and textile programme's Network Plus call to support development of a feasibility study for a national sorting and recycling infrastructure demonstration on textile waste.
- In The Loop campaign launched by Recycle for Greater Manchester (R4GM) to encourage recycling and educate residents on circular economy principles. Community Fund 2023 application round closed with 70+ applications.

1.5 **Natural Environment**

- Local Nature Recovery Strategy (LNRS) - Statutory regulations and guidance have now been published (awaiting funding from Defra). This includes a requirement to undertake a public consultation on the strategy. Communications and stakeholder engagement plans being drafted. Work on a State of Nature review, to form the evidence base for the strategy, has commenced (expected publication in summer 24). Brief developed with Trafford Council officers to integrate LNRS and Natural Capital approaches into the master planning of the Timperley Wedge site.
- ELMS Test and Trial Pilots - Workshop held with range of partners to discuss recommendation for a farm outreach/advice service. A proposition is being developed with United Utilities (focussing on phosphates) and discussions with Environment Agency and GMCA also taking place.
- Natural Course Phase 3 – Natural Course natural capital event held in Manchester, April 2023, and on-line water governance event, May 2023. Final samples taken for study of micro plastic contamination of Greater Manchester rivers. Invitations to tender for resources for planners and identifying priority locations for nature-based solutions to tackle road runoff circulated. Second survey of otters in the rivers of South Manchester commenced.
- Biodiversity Net Gain (BNG) – Needs and supply assessment reporting complete with dissemination of results to Districts (8 Districts now seeking to bring forward supply sites). Greater Manchester Environment Fund (GMEF) offer of support to Districts published and Additional Burdens funding from Defra received. Legal advice on securing offset site received via the GMEF and distributed to Districts on S106.
- IGNITION - Final audit report received with only 2% of costs across partners rejected.
- Natural Environment Investment Readiness Fund (NEIRF) – NEIRF I final report submitted to Defra. Natural England considering how carbon offsetting findings may support restoration of Chat Moss land now in their ownership.
- Round 2 of the Greater Manchester Green Spaces Fund (GSF) awarded and round 3 opened. 52 community projects have now benefitted from GSF funding.
- Green Social Prescribing (GSP) – New Nature for Health steering group set up to work to embed the outcomes of the pilot.
- Water Management – Integrated water management plan approved and published to accelerate improvements in our water systems through co-delivery (GMCA, Environment Agency and United Utilities).

1.6 **Communications**

- Green Summit 2023 – Programme planning progressing with regular updates and 'sound checks' with stakeholders. Sponsor Pack circulated to previous Green Summit sponsors, all challenge groups, and new partners. Two Headline Sponsors (Electricity Northwest and SSE) and three Official Partners (Suez Recycling and Recovery, Environment Agency, and Manchester Metropolitan University) secured.

Questionnaire circulated to all previous attendees asking for feedback on previous event (what worked well) and what they would like to see at this year's event.

- Environment Plan 2024 onwards – Initial pathway development and target setting discussions for the next Environment Plan have commenced. Greener Greater Life listening event held in Rochdale to gather insights to climate change from the ageing population. University of Manchester event 'Green Rising' planned for October 2023 to engage with communities on environmental sustainability.

2. KEY ANTICIPATED ACTION IN THE NEXT QUARTER

As a priority, the following activities will be delivered in the next Quarter:

2.1 Energy

- Deep Phase 3 – Detailed project design to be completed for 5 Heat Networks.
- Local Area Energy Plans (LAEPs) – Phase 2 bid submission to be developed.
- Go Neutral – Complete ERDF funded solar PV installations. Agree and deliver approach with Rochdale and Stockport for remaining wave 1 consultancy support. Complete site surveys for wave 2 consultancy support and progress priority projects through development process.
- Smart Energy – Commission and deliver consultancy support as required to develop schools solar PV offer and toolkit. Agree and finalise schools solar PV financial model. Continue discussions with DfE to explore collaboration opportunity.
- Energy Innovation Agency (EIA) – Hold Net Zero event to attract new innovators into the EIA. Recruit new staff to meet capacity needs and new sustainable finance business plan to be presented to the Board.
- Trafford Energy Park - Commence negotiations on Low Carbon Hydrogen with DESNZ.

2.2 Buildings

- Social Housing Decarbonisation Fund (SHDF) – Outstanding wave 1 retrofits to be completed. Continue to progress wave 2 activities including procurement and tenant engagement.
- Public Sector Decarbonisation Scheme (PSDS) – Complete consultancy commission on PSDS pipeline development activity and confirm list of buildings for a potential application to the PSDS 3c funding call. Identify replacement buildings for PSDS 3b due to three delivery partners withdrawing buildings from the programme. Develop and launch Greater Manchester decarbonisation case study video.
- Retrofit GM (Your Home Better) – Assess level of uptake through direct marketing campaign. Report back on the Salford research and incorporate the findings into Your Home Better and Local Energy Advice Demonstrator (LEAD) offers.

- ECO4 Flex scheme - Launch web portal and continue marketing and promotional activities through Districts and the NHS.
- Net zero new development - Continued development of net zero homes pipeline and review of Truly Affordable Net Zero Homes (TANZ) Implementation Plan.
- Good Landlord standard and enforcing Minimum Energy Efficiency Standards (MEES) – Further places to be offered on the Advanced Professional Certificate in the Private Rented Sector at Middlesex University.

2.3 Transport

- Active Bee Network - Complete GIS network mapping to enable forecasts of future delivery and facilitate planning of future schemes.
- Bike Hire Scheme – Manage antisocial behaviour and repairs to maintain an acceptable level of bike availability. Operational plans to be developed by Beryl in response to the current situation.
- E-hubs pilot – Salford trial sites to be up and running. Develop typologies to demonstrate how Hubs should function in line with Right Mix targets and spatial themes. E-scooter rack to be installed at Salford Crescent.
- Bus franchising – Tranche 1 contracts to commence in September 2023. Bus fare evaluation summary report (wave 2) to be published in Quarter 3. Full planning application for electrification of Stockport depot to be submitted. TfGM (non-bus) zero emission fleet to be fully operational.
- Clean Air Plan – Continue to prepare additional evidence as requested by Government including detailed modelling in support of Greater Manchester’s case for an investment-led, non-charging Clean Air Plan.
- Electric Vehicle Charging Infrastructure (EVCI) – Formalise funding arrangements. Additional resource secured and in post.
- Taxi EVI project (dedicated rapid charging points) – Districts to lead further installation go charging points using LEVI and City Region Sustainable Transport Settlements (CRSTS) funding pots.
- Freight Strategy - Build logistics into Local Transport Plan (LTP) considerations and ensure appropriate policies in place for growth locations.

2.4 Sustainable Consumption and Production

- Award public sector scope 3 emissions tender and commence work.
- Set up new task and finish groups for Plastics (Circular Economy) and Food Waste.
- Consumer behaviour insights - Findings of the focus groups and questionnaire to be evaluated and next steps to be considered.
- Single-Use Plastics – Develop staff communications and engagement toolkit to raise awareness of commitments under the Plastic Pact. Explore potential pilot of reusable cup scheme in Greater Manchester with City to Sea.
- Continue development of Community Climate Change e-learning course delivered via the Greater Manchester Green City website.

- Subject to outcomes of the textiles UKRI funding application and Sustain food expression of interest commence programme of work.

2.5 **Natural Environment**

- Local Nature Recovery Strategy (LNRS) – Sign off governance arrangements and set up of Taskforce for Nature. Complete stakeholder engagement and communications plan. Secure technical support for Timperley Wedge site and begin delivery of the commission. Await statutory regulations and guidance in advance of mandatory BNG commencing in November 2023.
- ELMS Test and Trial Pilots - Prepare for project closure, including final events and production of project report. Agreement to be made on how to take forward farm advice work.
- Natural Course Phase 3 – Conclude external commission on microplastics research. Commission roadside green infrastructure locations work and Water Framework Directive advice. Deliver final phase of Invasive Non-Native Species (INNS) delivery projects and consider next steps.
- Biodiversity Net Gain (BNG) – Ensure all Districts are moving forward with offsite BNG and agree template BNG policy wording. Develop template Section 106 for all Districts to use. Refresh of Greater Manchester BNG guidance underway led by Greater Manchester Ecology Unit (GMEU).
- Award Green Spaces Fund round 3 grants and open round 4 in September 2023.
- Hold first meeting of Nature for Health steering group and develop work programme.

2.6 **Communications**

- Green Summit 2023 – Progress sponsorship engagement, evaluate questionnaire feedback and finalise event programme. Develop ‘Road to Green Summit’ campaign including ticket sale launch and sponsorship announcement.
- Bee Net Zero – communications campaign to promote PV to businesses to be commenced.
- Further listening activities to be planned in line with the development of the next 5-Year Environment Plan.
- Announcement of successful applications to R4GM Community Fund 2023, Green Spaces Fund round 3 and first corporate sponsor of Greater Manchester Environment Fund.
- Support development and roll out of the LNRS including national announcement, communications and stakeholder engagement planning, content series building to public consultation in Quarter 4.
- Continue Your Homes Better and single-use plastic legislation communications and complete SHDF wave 1 communications (1,286 homes).

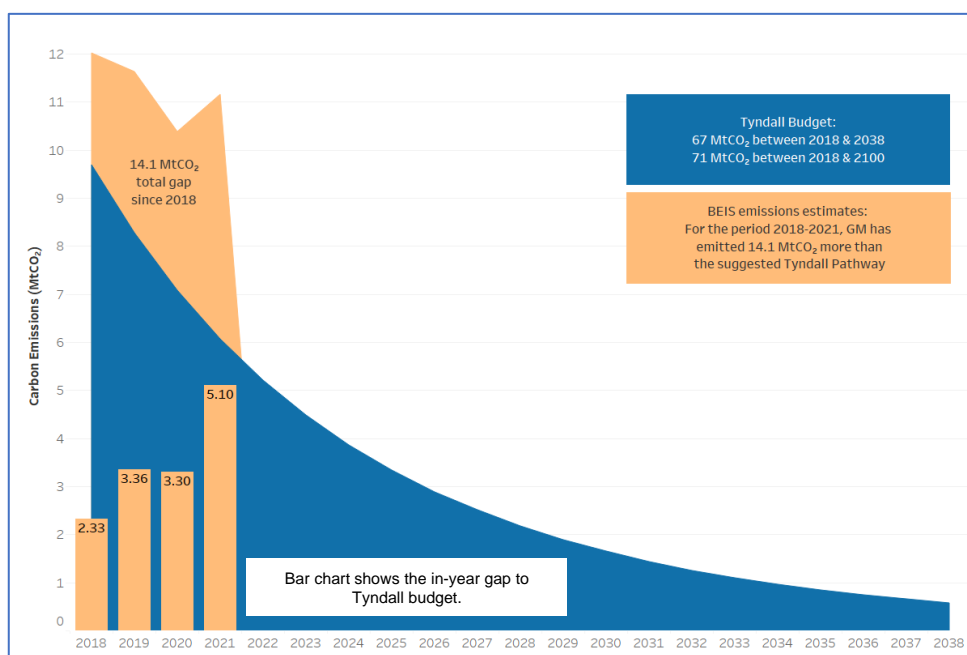
3. IDENTIFIED RISKS AND EMERGING ISSUES

- 3.1 Officers and sub-groups have identified a number of risks to existing, and particularly future, programme delivery. Mitigation of these risks, as far as possible, will be managed by the responsible Accountable Body.

In terms of the priorities set out in the 5 Year Plan, the following areas remain flagged as “red”.

Key risks:

- **Failure of the 5 Year Environment Plan to achieve a step change in reducing carbon emissions.** To achieve the 2038 mission, the GM 5-Year Environment Plan outlines our ‘fair’ carbon budget contribution of 67 mega tonnes for 20 years (2018-2038). The critical focus is not exceeding our total budget (67MtCO₂). From 2018 to 2021, GM’s emissions are 14.1MtCO₂ above the Tyndall budget, i.e. an additional 14.1MtCO₂ savings need to be made on top of the Tyndall budget. This gap has been increasing year on year, with new annual emissions data showing a rebound in emissions in 2021 as we emerged from the pandemic. The key point is that significant cuts must happen now. At our current rate of emissions, we will have exhausted our carbon budget within the next few years.



- **Failure to accelerate decarbonisation of buildings to meet low carbon heating targets.** Measures continue to be implemented with a focus on accelerating decarbonisation and increasing energy generation including the launch of Social Housing Decarbonisation Fund, Public Sector Decarbonisation Scheme, Go Neutral project including schools solar PV offer, and DEEP project delivery to identify Heat and Energy Network Opportunity Areas across Greater Manchester.

- **Level and depth of retrofit required to meet our overall ambitions is highly challenging.** The decarbonisation of Greater Manchester homes through deeper whole house retrofit is being mitigated by the publication of a Retrofit Report that sets the priorities and framework for action and, as part of that the Retrofit Challenge Group along with the Retrofit Taskforce is focused on delivering home and building retrofit at scale. Progress is also being made with the launch of the 'Your Home Better service' and Octopus Heat Pump offer. Greater Manchester has also joined a consortium, led by the UK Green Buildings Council including West Yorkshire, London and the West Midlands and funded by Climate-KIC to develop proposals for city-led retrofit. Additionally, the GM Skills team have produced a Skills Action Plan which with the newly actioned Low Carbon Finance Challenge Group complements the exist building and energy Challenge Groups which manage the actions arising from the Greater Manchester Retrofit Task Force, Chaired by the Mayor.
- **Failure to enhance our water bodies against level of ambition.** The GMCA, Environment Agency and United Utilities (through their Tripartite Agreement) have published an Integrated Water Management Plan to draw together a collective vision, objectives, and actions, and identify accountability and resources for delivery. The plan will deliver progressive improvements in sustainable water management, enhancement of the natural environment, accelerate natural flood management interventions and reduce the operation of storm overflows.

Previous areas flagged as “red”.

- **Failure to meet ambitious recycling and waste diversion targets.** Verified figures for 2021/22 show an increase in the recycling rate from 48.4% in 2020/21 to 51.1% in 2021/22 for Greater Manchester. The increase is down to improved recycling facilities across the network of 20 household waste recycling centres operated by SUEZ recycling and recovery UK. This includes new containers for mattresses, carpets, and hard plastics as well as containers where household items can be donated for reuse. Diversion from landfill remains at over 98%. Measures continue to be implemented to increase recycling rates at HWRCs and household kerbside recycling to deliver against 2024 target (55%). This item is now flagged as “amber”.

4.0 RECOMMENDATION

The Business Board is recommended to:

- Note and comment upon the progress outlined in this report and latest position set out in the dashboard attached at:
 - a. Annex 01 (5 Year Environment Plan Performance Overview)

5 Year Environment Plan Performance Overview

Progress Status			
Area	Priorities/KPIs (to 2024)	Status	
Energy	Add at least 45MW of local renewable energy by 2024	↑	Amber
	Additional 10TWh of low carbon heating by 2024	↔	Red
	Add at least a further 45MW of diverse and flexible load by 2024.	↔	Green
Buildings	Retrofit 61,000 homes/year (target 305,000 by 2024, 887,000 in total)	↑	Red
	Build 30,000 net zero carbon social rented homes by 2038.	↑	Green
	Reduce heat demand from existing commercial and public buildings	↑	Amber
SCP	38% reduction in industrial emission by 2025.	↓	Amber
	Limiting any increase in waste to 20%.	↑	Green
	Achieve a recycling rate of 55% by 2024, and 65% by 2035.	↑	Amber
Natural Env.	Managing our land sustainably, including planting 1m trees by 2024.	↔	Green
	Managing our water and its environment sustainably.	↑	Red
	Achieving a net gain in biodiversity for new development.	↑	Amber
	Increasing investment into our natural environment.	↑	Green
	Increasing our engagement with our natural environment - Number of Volunteers.	↔	Green
Transport	Reduce car use to no more than 50% of daily GM trips, by 2040 (remaining 50% to be public, or active travel)	↓	Amber
	Support expansion to 200,000 EVs in city region by 2024	↑	Amber

2038 Carbon Target	Costs	Resources	Overall Delivery	Risk
Red	Green	Green	Amber	Amber

Key Risks			
Risk Event	Risk	Mitigation Plan	Post Risk
Failure of Environment Plan to achieve a step change in carbon emissions.	Red	Regular reporting to Greater Manchester Green City Region Partnership Board and WLT.	Amber
Level and depth of retrofit required to meet our overall ambitions is highly challenging.	Red	Focus on retrofit accelerator proposals as way of overcoming these barriers in a coordinated way.	Amber
Failure to enhance our water bodies against level of ambition.	Red	Intergrated water plan in place to deliver progressive improvements.	Amber
Failure to add an additional 10TWh of low carbon heating by 2024	Red	Focus on acceleration of Retrofit including the launch of the 'Your Home Better' service, Octopus Heat Pump offer and DEEP project delivery.	Amber



About this dashboard

Greater Manchester faces major environmental challenges that threaten the health and prosperity of our region. We are taking action with the Five-Year Environment Plan, launched in March 2019. The plan sets out our long-term environmental vision – to be carbon neutral by 2038 – and the urgent actions we all need to take between 2019 and 2024 to help achieve this. [You can find the plan here.](#)

This dashboard keeps track of our progress against those actions. It is divided into six pages, with a page dedicated to evaluating progress in each of the plan's priority areas. You can use the menu in the top left to navigate between them, or click on the links in the box below. For more on the data used within each screen, click on the info icon in the top right of each box (eg see the one on this box).

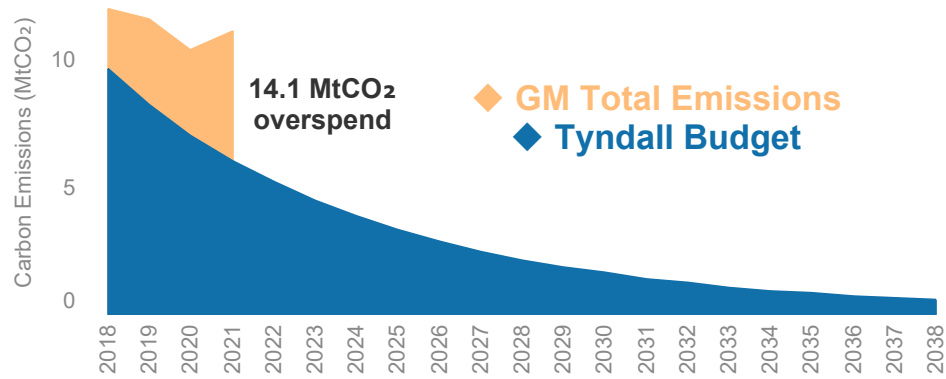
What targets are in the 5YEP and which are being tracked here? (click icon to navigate to page)

Page 100

Category	Icon	Target	Tracking Status
Emissions		Goal: Be carbon-neutral by 2038	See 'Emissions' page
Energy		E1: Increase local renewable energy (electricity) generation, adding at least 45MW by 2024	See 'Energy' page
		E2: Decarbonise how we heat buildings, adding at least 10TWh of low carbon heating by 2024	See 'Energy' page
		E3: Increase diversity & flexibility of electricity supply, adding at least 45MW of diverse & flexible load by 2024	See 'Energy' page
Transport		T1: Increase use of public transport and active travel, with car use reduced to less than 50% of daily GM trips by 2040	See 'Transport' page
		T2: Phase out fossil-fuelled private vehicles for zero emission (tailpipe) alternatives, with 200,000 EVs in GM by 2024	See 'Transport' page
		T3: Tackle the most polluting vehicles on our roads	In development
		T4: Establish a zero emissions bus fleet, with all buses zero emissions (tailpipe) by 2035	See GMS dashboard
		T5: Decarbonising freight transport and shifting freight to rail and water transport	In development
Buildings		B1: Reduce heat demand from existing homes by retrofitting 61,000 homes per year	See 'Homes' page
		B2: Reduce heat demand from existing commercial and public buildings by 10% by 2025	In development
		B3: Reduce heat demand in new buildings, with all new development net zero carbon by 2028	In development
SCP		SCP1: Produce goods more sustainably, reducing emissions from industry by 38% by 2025 compared to 2018 levels	See 'SCP' page
		SCP2: Become more responsible consumers, with 2024 waste production increased by no more than 20% from 2018	See 'SCP' page
		SCP3: Manage our waste as sustainably as possible, achieving a recycling rate of 55% by 2024	See 'SCP' page
		SCP4: Reduce unnecessary food waste	In development
Natural Environment		NE1: Manage our land sustainably, including planting 1m trees by 2024 and improving greenspace for nature	See 'Natural Env.' page
		NE2: Manage our water and its environment sustainably, enhancing 542km of waterways by 2027	See 'Natural Env.' page
		NE3: Achieve a net gain in biodiversity for new development	In development
		NE4: Increase investment into our natural environment	In development
		NE5: Increase engagement with our natural environment, through volunteering and access to local greenspace	See 'Natural Env.' page

All

How is GM progressing against the 2038 carbon budget?

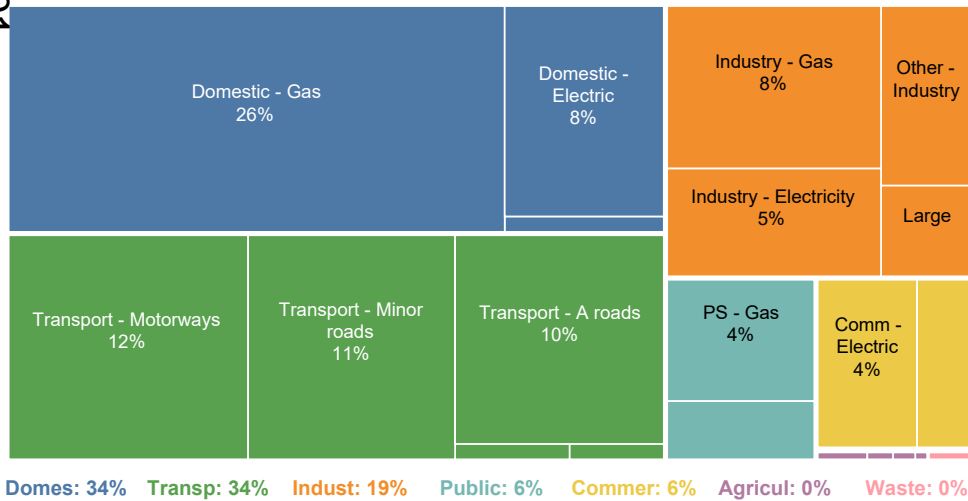


What is GM's 'business as usual' emissions forecast?

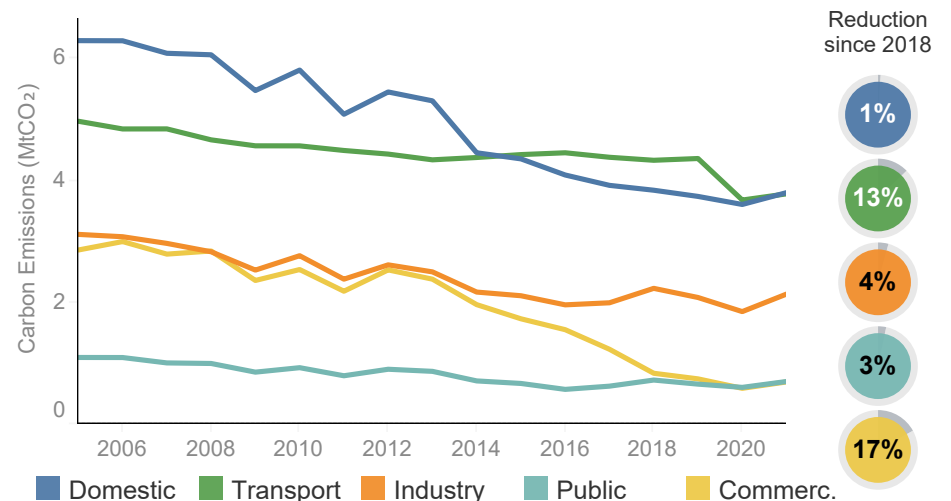


In development

Where are our emissions coming from?



How have our emissions changed over time?

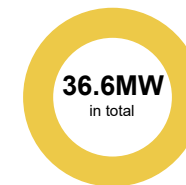
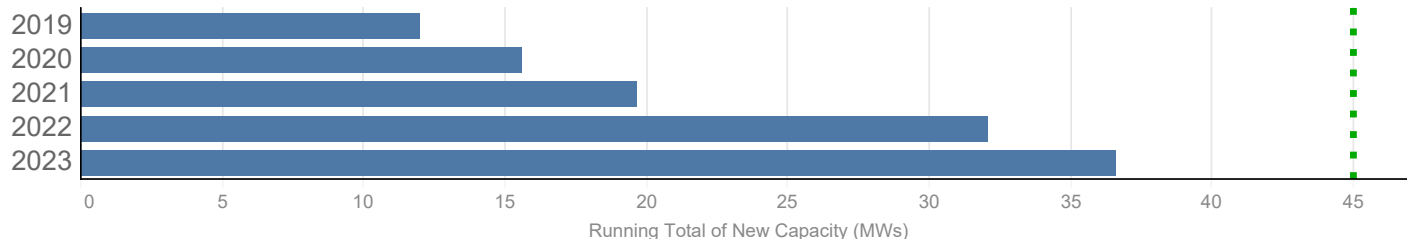


Greater Manchester's Energy Supply

Choose which local authorities to focus on: Greater Manchester

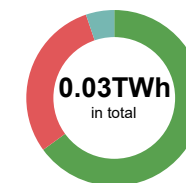
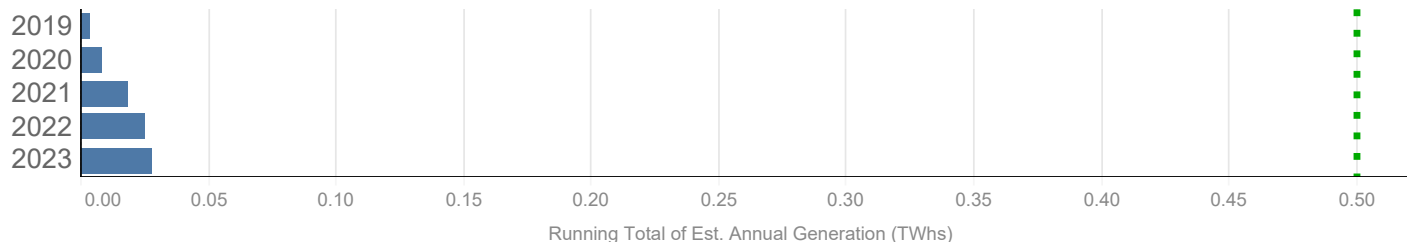
◆ Operational ◆ Under Construction - - - Target

E1: Increase local renewable energy (electricity) generation, adding at least 45MW by 2024



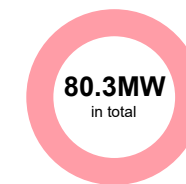
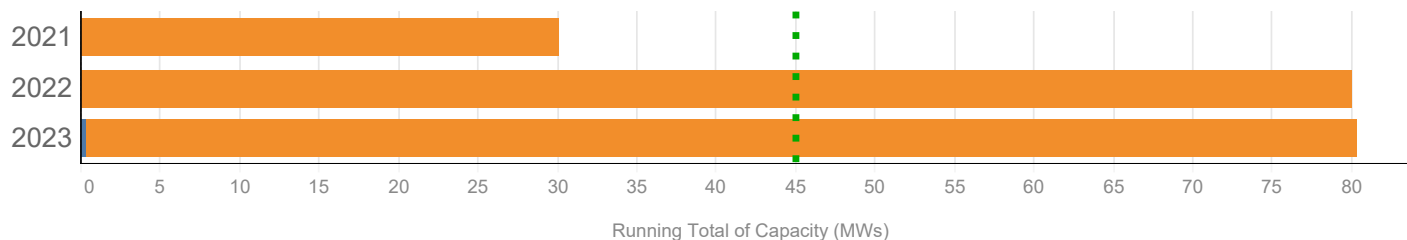
◆ Solar Photovoltaic

E2: Decarbonise how we heat buildings, adding at least 10TWh of low carbon heating by 2024



◆ Ground/Water SHP ◆ Solar Thermal ◆ Air SHP

E3: Increase diversity & flexibility of electricity supply, adding at least 45MW of diverse & flexible load by 2024



◆ Battery

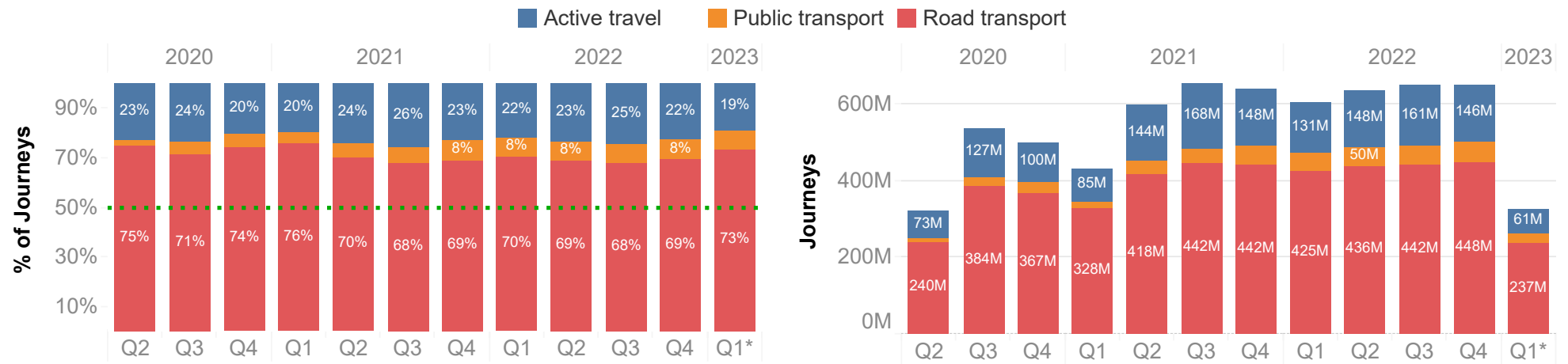
Journey mode

Journey quarter

All

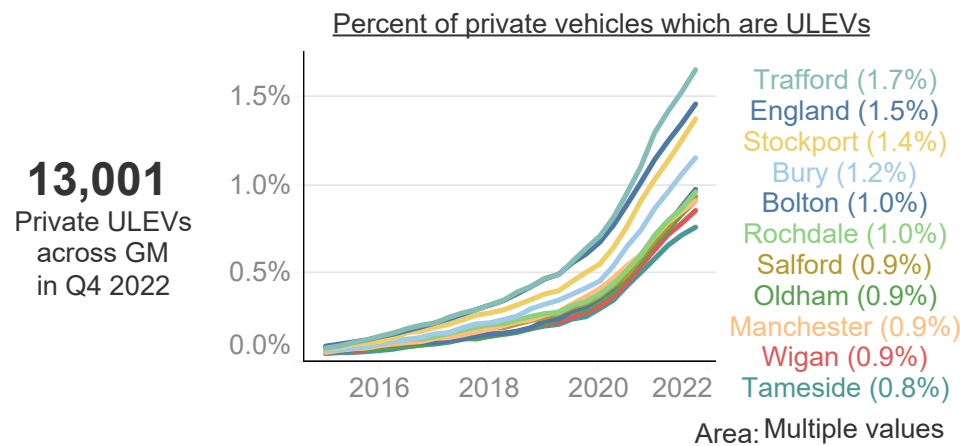
All

T1: Reduce car use to no more than 50% of daily GM trips by 2040 (with the remaining 50% made up of public and active travel)

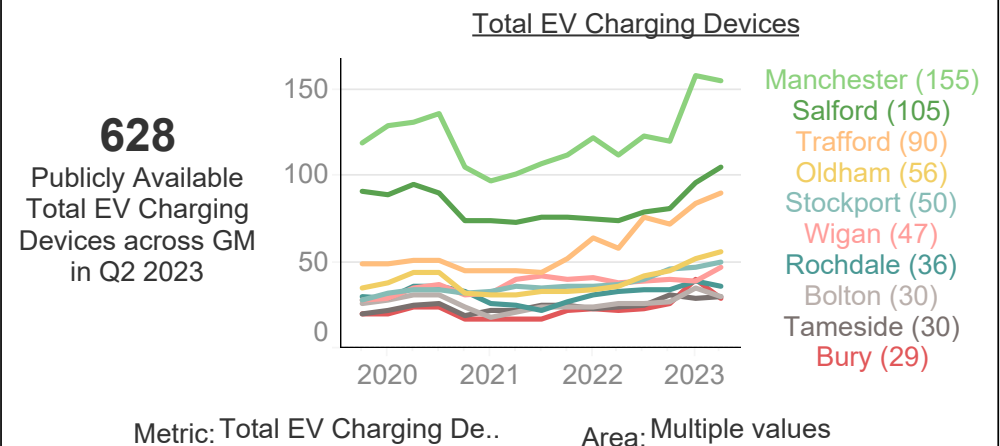


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T2: Support expansion to 200,000 EVs in GM by 2024



T2: Increase the number of publicly accessible EV charging points



Local Authority

Tenure

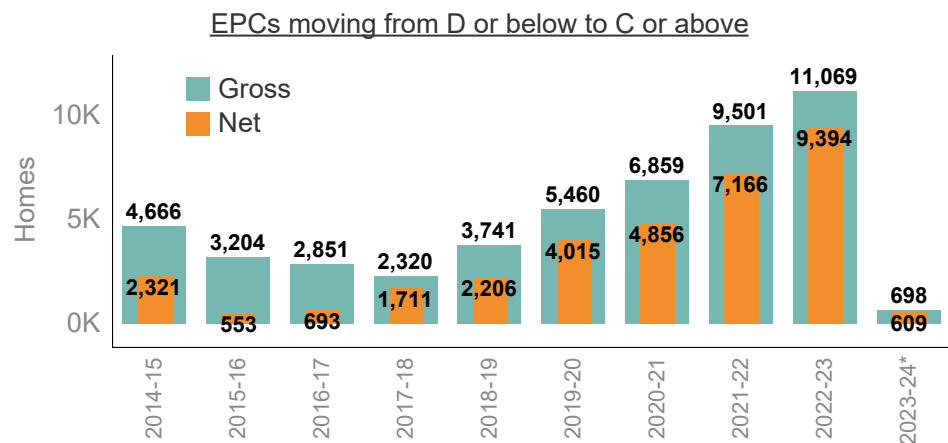
Property Type

All

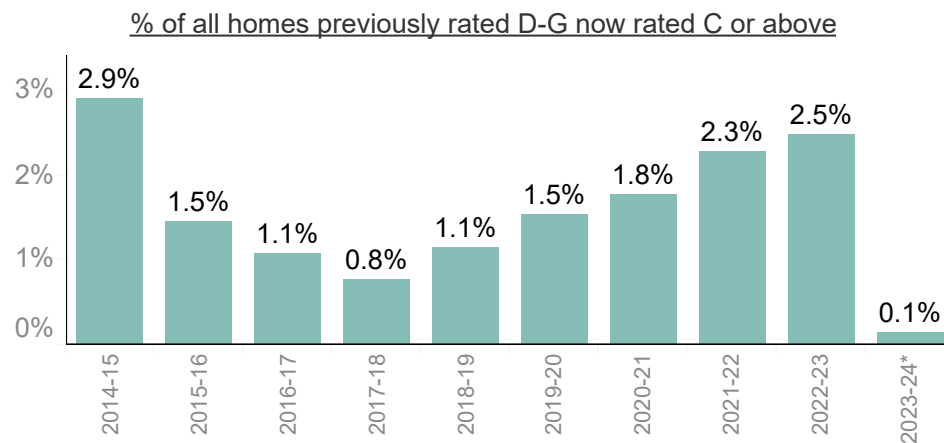
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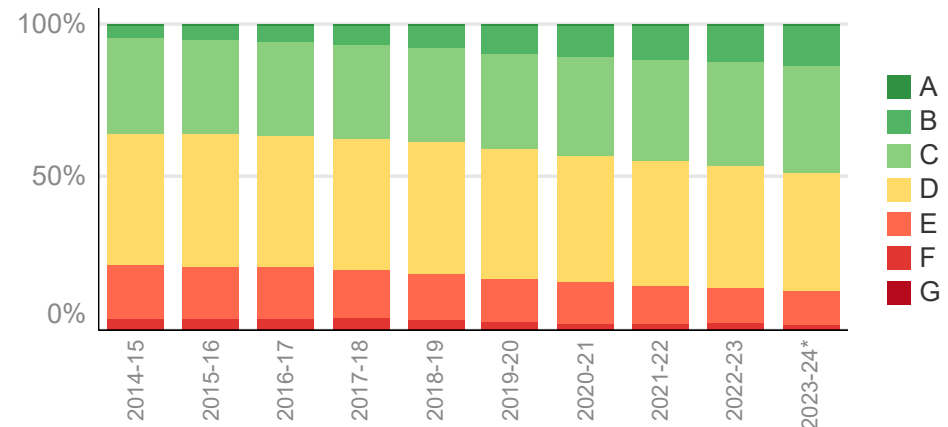
B1: Retrofit 61,000 homes per year (305,000 by 2024)



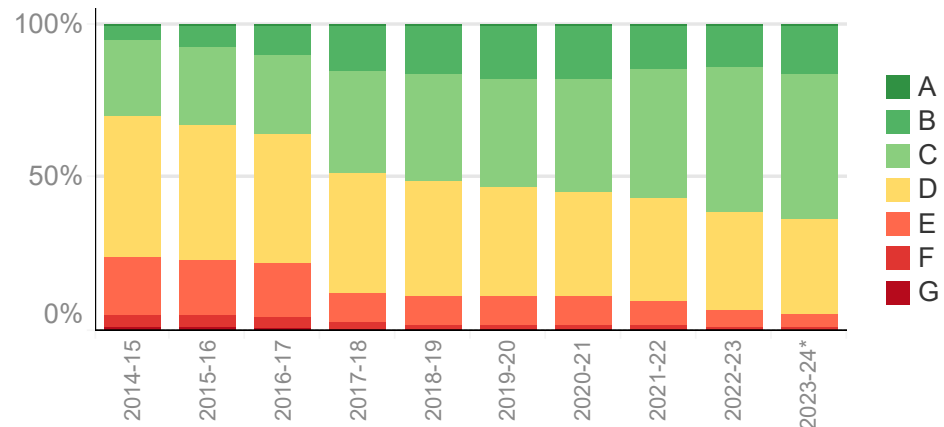
What proportion of inefficient homes are improving each year?



Proportion of EPC certificates in each band (all EPCs to date)



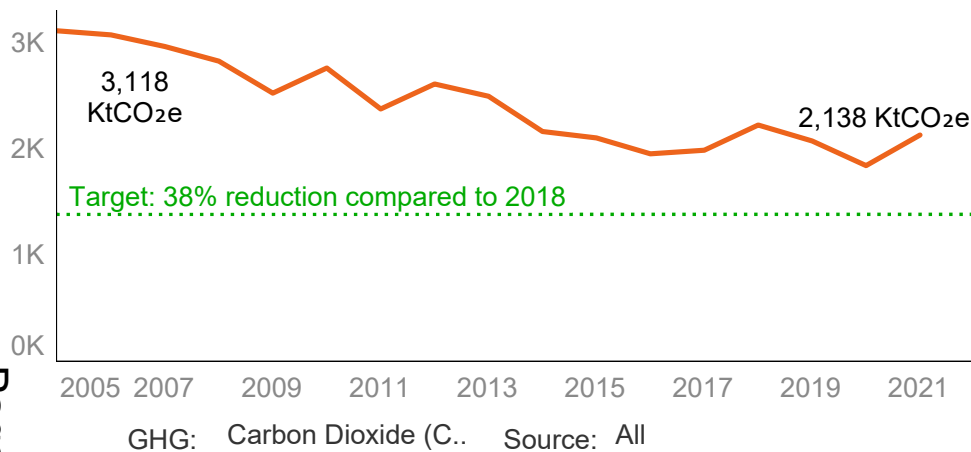
Proportion of EPC certificates in each band (registered in that year)



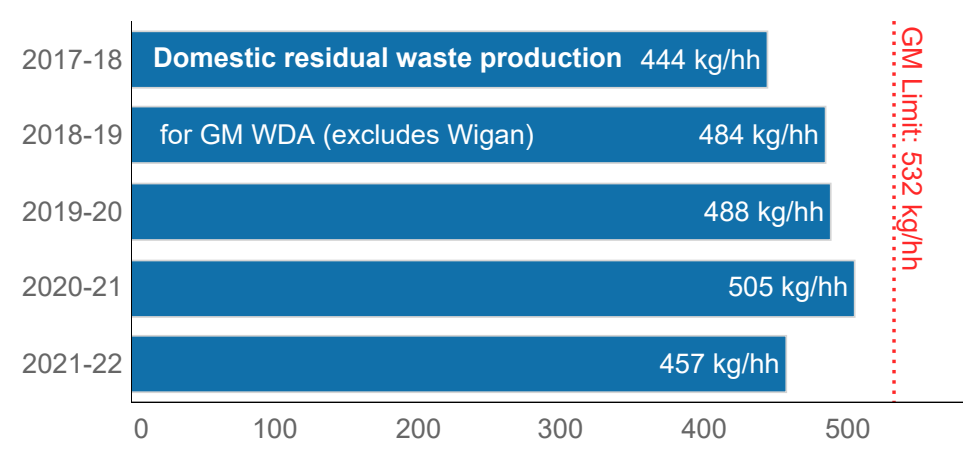
Page 104

Filter data by area: Greater Manchester

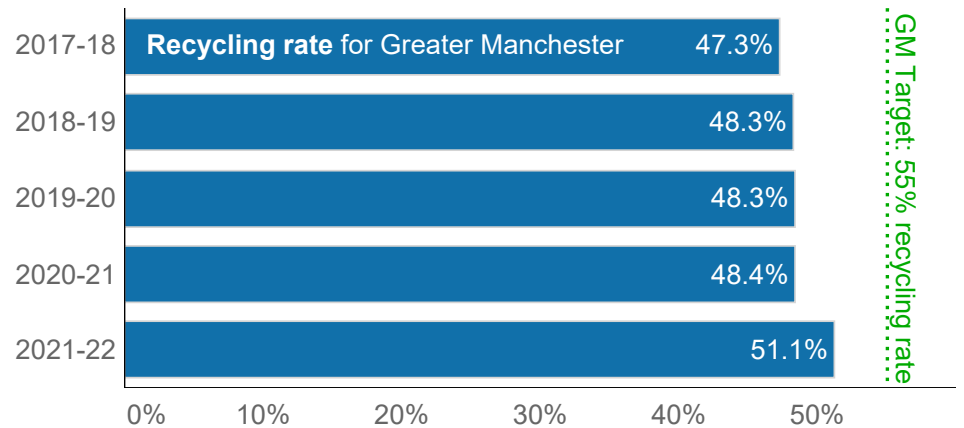
SCP1: Reduce industrial emissions by 38% by 2025



SCP2: Limit any increase in 2018 levels of waste to 20% by 2024



SCP3: Achieve a recycling rate of 55% by 2024

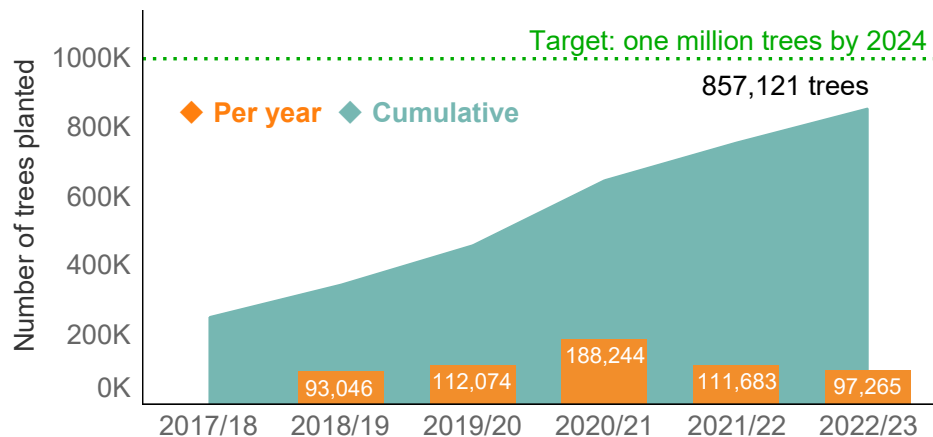


In development

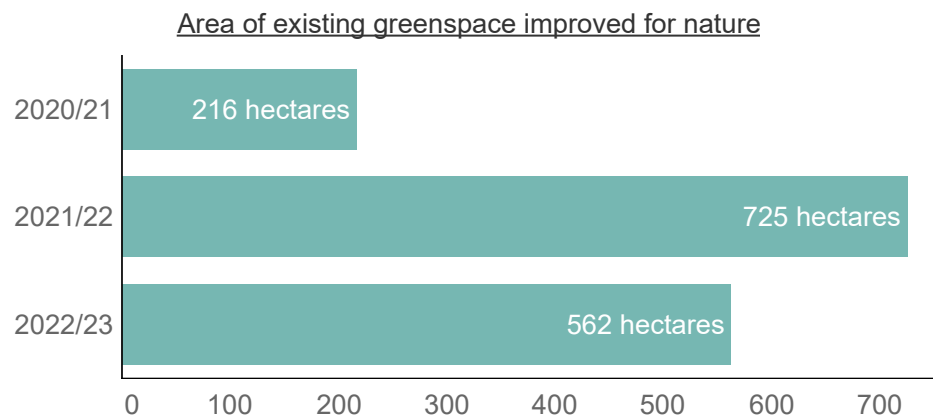


In development

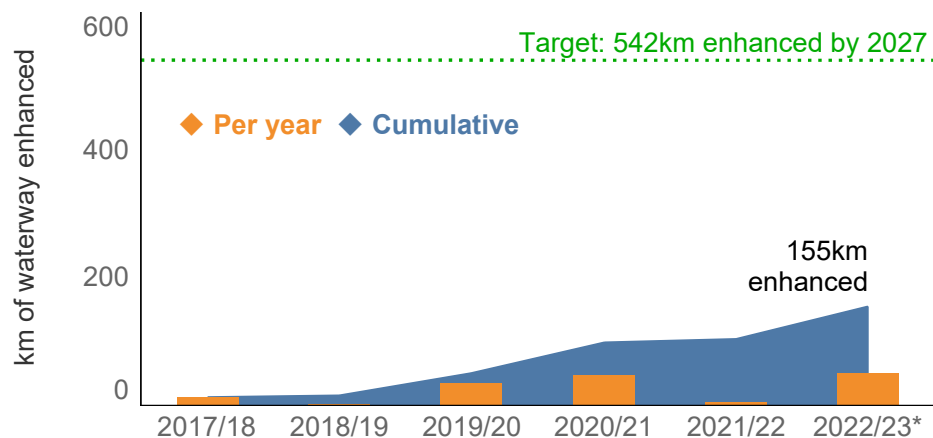
NE1: Plant one million trees by 2024



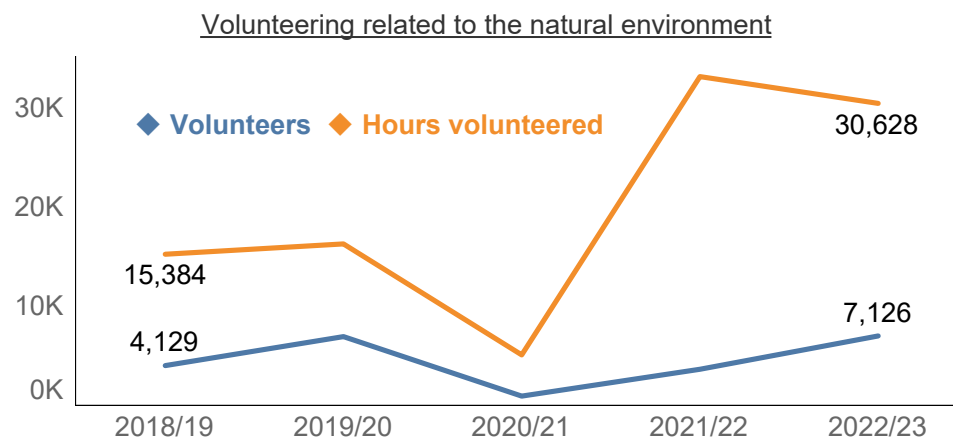
NE1: Improve existing areas of greenspace for nature



NE2: Enhance 542km of waterways by 2027



NE5: Increase engagement with natural environment



GM BUSINESS BOARD

SUBJECT: GM Business Board (LEP) Annual Delivery Plan and Report

DATE: 19th July 2023

FROM: Simon Nokes, Executive Director, Policy and Strategy

PURPOSE OF REPORT

This report provides an update on the 2023/24 Annual Delivery Plan which sets out the key activities that will help GM Business Board (LEP) realise its strategic ambitions with a focus on the GM Economic Vision over the period to March 2023.

This report also provides an update on the 2022/23 Annual Delivery Report which highlights the Board's progress in realising its vision over the past year.

RECOMMENDATIONS

The LEP is asked to ratify the Annual Delivery Plan and Report which have been approved in principle by the Chair.

Equalities Impact, Carbon and Sustainability Assessment

The GM Economic Vision provides a blueprint for remodelling the city-region's economy. It includes a range of long-term initiatives to help businesses innovate more effectively and become more productive, creating a greener and more resilient Greater Manchester.

This includes a clear commitment to tackle inequalities, embrace diversity and recognise the importance of civil society with actions aiming to encourage diversity in company leadership and workforce and turn Greater Manchester into a living wage city-region.

The Vision also builds on GM's bold target of carbon neutrality by 2038 and will support Greater Manchester in driving the UK as a global leader in low carbon innovation.

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David Rogerson david.rogerson@greatermanchester-ca.gov.uk

1. INTRODUCTION

- 1.1 The 2018 national LEP Review set out that LEPs were required to publish an annual delivery plan setting out a summary of the key economic development priorities, interventions and funding along with an end of year report highlighting progress in achieving these priorities.
- 1.2 GM Business Board (LEP) has published an annual plan and report since then with the most recent Annual Delivery Plan agreed for 2022/23 which set out the key actions and performance indicators require to realise the ambitions of the Greater Manchester Strategy, Local Industrial Strategy and GM Economic Vision.
- 1.3 It outlined the key activities that the Board would lead on to drive the strategic development of Greater Manchester forward; the key milestones for growth programmes; and set out how the GM Business Board (LEP) would operate and develop as a Strategic Board in 2022/23.
- 1.4 The team has now produced a draft plan for 2023/24 along with the annual report for 2022/23 which have been approved in principle by the Chair with a view to ratification by the Board.

2. ANNUAL DELIVERY PLAN 2023/24

- 2.1 This Annual Delivery Plan sits alongside a number of other Greater Manchester documents that collectively provide a comprehensive framework for strategy development, project delivery, and performance management.
- 2.2 The Plan sets out the key activities that will help GM Business Board (LEP) realise its strategic agenda over the period to March 2024 with a focus on delivery of the GM Economic Vision which forms the main framework of action for the board.
- 2.3 The Plan highlights the strategic and policy context for the implementation of the Vision along with the role of the Board and partners in driving delivery and the governance that has been put in place to ensure the Board is able act as a transparent, accountable and high performing team.
- 2.4 However, In March 2022, the GM Business Board (LEP) received a letter from Minister Neil O'Brien MP (DLUHC) and Minister Paul Scully MP (BEIS) setting out that LEPs will now be integrated into local democratic institutions following the policy announcement made in the Levelling Up White Paper as well as indicating the process by which this will be achieved.

- 2.5 The Board is therefore evolving towards a new model fully integrated into GMCA with a remit to be as ambitious as possible, maintaining a strong business voice at the heart of city region and maximising economic growth across Greater Manchester.
- 2.6 This model was [approved by the Board and GMCA in September](#) and is reflected in the Annual Delivery Plan including an initial framework of GMS priorities for 2023/24 including Innovation; Net Zero; Real Living Wage; Economic Resilience; Marketing and International; Business Support; Investment Finance; Addressing Inequalities; and Skills.
- 2.7 In line with the approach adopted in previous Plans, the document is set out to reflect the key themes of Strategy, Performance and Governance as follows:
- **Strategy:** Outlines the key priorities the GM Business Board (LEP) will lead on to drive the strategic development of Greater Manchester
 - **Performance:** Sets out how the Board will maintain delivery of the GM Economic Vision whilst the process of LEP integration is finalised
 - **Governance:** Summarises how the GM Business Board (LEP) will operate and develop as a strategic Board in 2023

3. ANNUAL DELIVERY REPORT 2022/23

- 3.1 The report highlights GM Business Board (LEP)'s progress in achieving its priorities in 2022/23. As above, this is set out to reflect the key themes of Strategy, Performance and Governance.
- 3.2 This includes:
- **Strategy:** Sets out how the Board contributed to the strategic development of Greater Manchester including the refresh of the Greater Manchester Strategy, the next steps in developing the GM Local Industrial Strategy and the clear strategic framework provided by the GM Economic Vision
 - **Performance:** Highlights the progress in delivering against the board's key priorities with a focus on the GM Economic Vision including the Local Growth Fund, Get Building Fund and Capacity Fund
 - **Governance:** Demonstrates strengthened governance procedures through updated Board membership; maintaining transparency and accountability; and further developing partnership and engagement

4. RECOMMENDATIONS

- 4.1 Recommendations appear at the front of this report.

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Action Plan: Strategic Communication for GM Business Board: 23/24
Delivered by Marketing Manchester and GMCA

Background/Context

This 2023/24 Action Plan outlines a rolling programme of activity for communications and content provision in support of GM Business Board priorities from April 2023-2024. The Plan is designed to be reactive and responsive to changes and challenges at local and national level; a plan that will develop and evolve.

In March 2022, the government concluded a LEP review which resulted with the publication of *'Guidance on integrating Local Enterprise Partnerships into local democratic institutions'* which anticipated that "LEPs will eventually fully integrate into local democratic institutions in line with our mission to offer a devolution deal to everywhere that wants one by 2030". In response Greater Manchester proposed a new model for the future of the GMLEP and its integration into GMCA. The new model, which proposed that the GM LEP name change to GM Business Board, ensured that GM builds upon its already integrated model by maintaining a strong business voice at the heart of Greater Manchester's governance arrangements.

This Action Plan therefore reflects the new operating model of the GM Business Board – maintaining a strong business voice, centred on its key deliverables; focused around the three main agendas: *Environmental: Making Greater Manchester the UK's Leading Green City Region; Social: Supporting all people in the city-region to achieve their full potential and Governance: Tackling Inequalities to make Greater Manchester the UK's most Diverse and Inclusive City Region.*

The programme of work outlined will support the unique partnership model of GMCA/GM Business Board leadership through a shared vision for the city-region. This is set out within the Greater Manchester Strategy, the Greater Manchester Local Industrial Strategy and the Greater Manchester International Strategy. Activity will seek to position Greater Manchester as a city-region that can support UK economic recovery and growth, maintaining a strong business voice, while leading green growth and innovation and tackling inequalities. Marketing Manchester and GMCA Communication/Media and Public Affairs teams will work together to deliver this activity.

Key Themes and Messaging

Communications activity throughout the year is structured to support the activity of the GM Business Board in communicating the following:

Overarching:

- Environmental: Making Greater Manchester the UK's Leading Green City Region;
- Social: Supporting all people in the city-region to achieve their full potential
- Governance: Tackling Inequalities to make Greater Manchester the UK's most Diverse and Inclusive City Region.

Long-term responsibilities:

- Driving Innovation
- Stimulating new economic opportunities in priority sectors
- Private sector investment in skills
- Good employment to support growth
- Attracting private capital investment into the city

Reacting to short-term issues, for example:

- Cost of living and cost of doing business crisis
- Maintaining business confidence
- National and/or political issues that impact GM businesses

The GM Business Board members will drive delivery through a number of affiliated groups. Communications will support the following activity:

Priority	Lead Member/Affiliated Group	Deliverable
Innovation	Chris Oglesby Chair of Innovation Greater Manchester	Helping create an innovation ecosystem across the city region which will drive our frontier sectors; support productivity in all parts of the economy via innovation adoption; and generate solutions to societal issues such as achieving net zero

Net Zero	Steve Connor Chair of Bee Net Zero	Ensuring all our businesses are on a journey to Net Zero by making Greater Manchester the easiest place in the UK to become a net zero business
Real Living Wage	Lou Cordwell Chair of the Living Wage City Region Action Group	Supporting businesses in becoming the first city region to pay all employees a real living wage
Economic Resilience	Economic Resilience Group	Ensuring issues affecting the resilience of GM's businesses and economic networks are fully understood and emerging responses are developed and debated
Marketing and International	Mike Blackburn Chair GM International Marketing Advisory Board	Promoting Greater Manchester to our identified global, national and local audiences as a place to visit, invest and do business to boost Greater Manchester's ambitions
Business Support	Vanda Murray Chair of Business Support & Finance Advisory Board	Understand and respond to the needs of entrepreneurs and businesses to start, and grow; addressing productivity, inclusivity, and environment sustainability, via the Growth Hub and working in partnerships with public and private sector.
Investment Finance	Miles Rothbury Business Finance Advisory Group	Ensuring that finance needs of businesses and market finance gaps are understood. Improve the signposting of available finance in GM (public and private) to support business start-up and growth as well as attracting new finance solutions to GM.
Addressing Inequalities	Vimla Appadoo GM Good Employment Charter	Working with business to address inequalities and improve wellbeing by raising employment standards across Greater Manchester for all organisations of any size, sector or geography
Skills	Justin Kelly GM Employment and Skills Advisory Panel	Ensuring an integrated employment and skills ecosystem that is demand led by employers building Greater Manchester's economic growth through the skills and talent development of its people.

Target Audience and Reach

Activity will target senior UK Government officials, academic, scientific and business leaders both locally and nationally who can corroborate, support and amplify Greater Manchester's reputation in delivering economic activity unlocking prosperity.

Reach: A focus for 23/24 will be to identify key distribution channels to increase audience for voice and presence of GM Business Board and high-profile placement of key messages. Activity will include identification of distribution channels providing greatest reach to the following target audiences:

- **Business** - Greater Manchester priority and growth sectors, Greater Manchester SME's.
- **Government** - Greater Manchester MP's with an economic and business remit. Treasury / DSIT / DBT / DLUHC / Sector portfolio ministers
- **Investors** - National and International target markets – Europe, USA, China, India, Japan and UAE in line with the International Strategy
- **Greater Manchester Stakeholders & residents** - Introduce and inform the people who live in the city-region about their Greater Manchester LEP.

Governance

Guided by a Steering Group (comprising GM Business Board Chair/board members), Marketing Manchester and GMCA communications colleagues will deliver a rolling programme of strategic and tactical communications support emphasising the role for Greater Manchester in enabling UK economic growth, the UK's levelling up agenda, innovation, and green growth.

An update report will be submitted to every Business Board and a quarterly communications item will be added to the agenda to allow a more detailed update and discussion. The action plan including outputs will be updated and reviewed monthly.

Delivery

Both Marketing Manchester and GMCA will work together to deliver this strategic and tactical communications framework. Marketing Manchester will lead on content curation, events and digital elements of this work, developing and delivering strategies to achieve standout for key sector narratives and overarching themes. GMCA communications colleagues will lead the media relations and public affairs elements of this activity, with an emphasis on the profile of the GM Business Board and ensuring that Government / stakeholder engagement is supported by clear and consistent communications.

Marketing Manchester and GMCA will work alongside colleagues at MIDAS, The Growth Company, Industry, Local Authorities and Academic partners to collaborate in the creation and delivery of the areas of activity summarised below and provided in the action planner at Annex 1.

Areas of Activity

- **Content:** Planning and execution of a suite of strategic content for use and promotion via the GM Business Board Insights section and other key channels. The aim is to produce original content, including Insight articles, social video production, and social media assets. *Led by Marketing Manchester.*
- **PR and media relations:** Increased proactive PR and media relations activity will be delivered in support of the GM Business Board Economic Strategic Communications. Activity will include the development of relationships with key media and make journalists aware that Business Board members will be available for relevant print/online/radio/TV interview opportunities within their areas of expertise. Activity will also promote success in workstreams linked to Business Board meetings. Relevant GMCA media releases will also include quotes from Business Board members in GMCA/BB releases around Greater Manchester economy/business/enterprise/digital. *Led by GMCA*
- **Think Pieces / Op-Ed's:** Providing expert insight to important business/economic issues. These would be placed with target media and shared with the Business Board Network and on the GM Business Board website. *Led by GMCA and Marketing Manchester.*
- **Develop and deliver GM LIS priority sector-specific Promotional campaigns:** (health and social care innovation, advanced materials, digital sector, low carbon), in collaboration with industry and academic partners. Targeting key UK national and sector media with a rolling programme of content highlighting Greater Manchester economic strengths, with messaging nuanced towards economic recovery. *Led by Marketing Manchester/MIDAS*
- **Website and thematic content development:** Continued delivery and development of gmbusinessboard.com. Including rolling content on Insights section of the website, with development of a new form of content marketing to highlight priority themes and stories, including in depth articles, video storytelling and associated social media. *Led by Marketing Manchester*
- **Social Media:** Maintenance and delivery of social media posts via the GM Business Board channels, including Twitter and LinkedIn. Develop content to increase interest and engagement in these channels. *Led by GMCA and Marketing Manchester.*
- **Support for GM Business Board hosted events:** Support for GM Business Board business focussed events will be developed and delivered focusing on business support and exploring and informing key sector themes and activity. *Led by Marketing Manchester*
- **Public Affairs:** GMCA will lead the public affairs elements of this activity, with an emphasis on the profile of the GM Business Board and ensuring that Government / stakeholder engagement is supported by clear and consistent communications. Opportunities for public affairs activity to align with the content and events elements of this work will be identified. *Led by GMCA*

Communication & Engagement with LEP Board

- Monthly LEP Board Update report
- Weekly newsletter including key stories/comms to share
- Social media pack. Scheduled GM Business Board social media plan, to include generic economic posts and posts highlighting key strengths within local authorities.

KPIS and Evaluation

The following KPIs are suggested:

- To deliver at least 15 packages of bespoke content creation, to include video, thought leadership, social media posts for own channels.
- Media coverage in top tier media (FT, Guardian) leading sector media titles; monthly coverage in regional business/local media (MEN, North West Business Insider) x 10
- 6 x thought leadership articles for GM Business Board leaders;
- Sector themed campaigns (to include news creation, PR, social media, content): innovation, green, digital and tourism
- Opportunities to See (OTS) 10million
- 20% increase of social media followers to GMLEP channels including Twitter and LinkedIn

Impacts and outcomes will be evaluated through the Government Communications Service Framework and presented to the steering group on a regular basis.

Annex 1: Current Action Plan – N.B. Action Plan is flexible and subject to change as opportunities emerge

Date	Activity	Details of project	Outline of communications plan
May 16-18	UKREiif	The UK's Real Estate Investment & Infrastructure Forum. Held in Leeds.	Greater Manchester presence led by Marketing Manchester. Participation in panel events, social media activity from Business Board channels.
June TBC	Foundational Economy Innovation Fund	First phase of FEIF projects announced.	Press release announcing first tranche of funding for FEIF projects. Interesting stories/projects highlighted through more detailed case studies. Social media activity.
Ongoing	Business Board – rebrand	Transition from LEP to Business Board.	Changes across Business Board's digital presence, including new logo, changes to website and social media accounts.
June 19 – 24	Good Employment Week	Good Employment Week – week-long celebration of Good Employment movement in GM.	Support and amplify Good Employment Charter social media, PR and comms activity throughout week.

		Links to Living Wage City-Region ambitions.	
TBC – check-ins at regular intervals over next 12 months	Innovation Accelerator	Communications around outcomes from the GM IA projects.	Build on relationships already established with project partner comms leads. Amplify their updates and announcements and use opportunities to promote wider GM IA programme. Using IGM website as primary channel.
June 23	Business Board – thought leadership	Topic: Transport.	Led by GMCA. Thought leadership piece published on Business Board website and shared on social channels. Potential to accompany with talking heads video piece (produced by MM).
July TBC	Business Board – thought leadership	Topic: Culture and its role in GM economy – using MIF as news hook	Led by MM. Thought leadership piece published on Business Board website and shared on social channels. Potential to accompany with talking heads video piece (produced by MM).
July 6	Living Wage Champions	Living Wage Foundation’s annual Living Wage Champions awards hosted in Manchester. Links to Living Wage City-Region ambitions.	Event hosted at National Football Museum in Manchester. Support LWF with organisation of event, comms activity including press release and social media in the build-up and for the event.
July TBC	Bee Net Zero – solar campaign	Encouraging GM businesses to join the “rooftop revolution” and install solar on their premises.	Press release, social media assets and video, paid social media marketing, collaboration with Solar Energy UK (TBC)
July/August TBC	Business Board – thought leadership	Topic: Addressing Inequalities – TBC depending on “deep dive” delivered at Business Board meeting.	Led by MM. Thought leadership piece published on Business Board website and shared on social channels. Potential to accompany with talking heads video piece (produced by MM).

September TBC	Business Board – thought leadership	Topic: Economic Resilience – TBC depending on “deep dive” delivered at Business Board meeting.	Led by GMCA. Thought leadership piece published on Business Board website and shared on social channels. Potential to accompany with talking heads video piece (produced by MM).
September TBC	Innovation Accelerator – GM launch event	Launch event for GM projects – providing positive reset moment, promote projects and partners locally, and providing opportunity for Government to engage with the GM portfolio. Potentially aligned with (but not contingent on) Ministerial visit.	Organisational support for event. Venue TBC – partner to provide in kind. Content and social media activity during and post-event.
September 27-28	London Real Estate Forum	Annual forum bringing together leaders from the industry, public sector, government, investment and business communities, to drive sustainable investment and development in cities.	TBC - Greater Manchester presence led by Marketing Manchester. Participation in panel events, social media activity from Business Board channels.
October 1-4	Conservative Party Conference	Annual party conference returning to Manchester.	TBC – opportunities for engagement around CPC. Oscar Lynch and MM to attend CPC planning calls being convened by CA public affairs team.
October TBC / ongoing	Labour party engagement	Engagement with Jonathan Reynolds MP – Shadow SoS for Business and MP for Stalybridge and Hyde	TBC – either tied to party conference or at another date – could involve invitation to meet with Business Board.

November TBC	Business Board – thought leadership	Topic: International Marketing – TBC depending on “deep dive” delivered at Business Board meeting.	Led by MM. Thought leadership piece published on Business Board website and shared on social channels. Potential to accompany with talking heads video piece (produced by MM).
December TBC	Innovation Greater Manchester	“One year on” event for Innovate UK MOU signing.	TBC - event following up last year’s launch event at the GEIC.
Q4 TBC	Foresight reports	Publication of Foresight reports – developing GM response to opportunities and challenges raised in Independent Prosperity Review.	TBC
January 2024 TBC	Business Board – thought leadership	Topic: Business Support – TBC depending on “deep dive” delivered at Business Board meeting. (DR)	Led by GMCA. Thought leadership piece published on Business Board website and shared on social channels. Potential to accompany with talking heads video piece (produced by MM).
March 2024 TBC	Business Board – thought leadership	Topic: Investment Finance – TBC depending on “deep dive” delivered at Business Board meeting.	Led by MM. Thought leadership piece published on Business Board website and shared on social channels. Potential to accompany with talking heads video piece (produced by MM).
March 8-16 2024	SXSW 2024	Annual conference and festival held in Austin, Texas focusing on	Greater Manchester presence led by Marketing Manchester. Participation in panel events, social media activity from Business Board channels.

		tech, film, music, education, and culture.	
March 12-15 2024	MIPIM 2024	Global real estate and investment exhibition, conference and networking event, held annually in Cannes.	Greater Manchester presence led by Marketing Manchester. Participation in panel events, social media activity from Business Board channels.

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