



GREATER MANCHESTER EXPORT PLAN 2022-2025

Global Opportunities for All Businesses

December 2021



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1 – Foreword

International trade is a strategic priority for the UK, Northern Powerhouse and the Greater Manchester City-Region as we emerge from a challenging period following the COVID-19 pandemic and EU Exit transition. The region's unique industrial history and exporting footprint reinforces the view that businesses in the region need to look outwards for opportunities in order to increase their competitiveness, create quality jobs and improve productivity.

Residents, business leaders and local authorities in the region have always acknowledged the importance of being globally connected promoting widely the benefits of internationalisation. A significant manifestation of this strong belief was the creation of the Manchester Ship Canal, allowing a city-region 40 miles inland to become Britain's third busiest port.

Greater Manchester's location in the heart of the Northern Powerhouse region presents it with a significant opportunity to make a major contribution to the UK's future economic growth. At the same time, just as it did in the 18th and 19th centuries, Greater Manchester can lead an export revolution drawing on the amazing resources, character and determination of its people.

The Greater Manchester Local Enterprise Partnership (LEP) and its strategic partners are committed to building on the region's history of innovation and leveraging it to create a modern blueprint for growth, working closely with international partners to overcome recent challenges and drive the creation of a healthier, smarter, greener and more resilient Greater Manchester.

The total value of goods exported in 2019 was £6.6bn by almost 11,000 GM businesses. Top exporting sectors include Machinery and Transport Equipment, Chemicals and Related Products, Manufactured Goods and Food and Live Animals.

In terms of services, Greater Manchester exported £8.4bn worth of trade in 2018, with Financial and Insurance Services being the largest sector, almost twice as large as the second sector (Transportation and Storage). Real Estate, Professional, Scientific and Technical Activities sectors come third followed closely by Administrative and Support Services.

The UK government produced a new UK Export Strategy in November 2021 setting a pathway for the UK to reach £1 trillion worth of exports by 2030.

This goal will be achieved through a joint effort between government and businesses across the UK through a strategy that responds to the changes in the global economy, tilting towards the Indo-Pacific region.

There is no doubt that the uncertainty of the exit from the European Union and the deep economic shock caused by COVID-19 have had a significant and ongoing impact on our Exports. However, we take encouragement from the resilience of some of our key sectors and that we are seeing good early results as the COVID-19 lockdown is released and Export levels recover.

This Export Plan defines five strategic enablers for Export Growth and showcases the support available to existing and new exporters in the Greater Manchester City-Region.

There is potential for increased export-led growth in the core goods and services sectors as well as significant growth opportunities with new technologies such as Hydrogen Generation and Cybersecurity.

The challenges we have seen in recent months have only served to reinforce the City-Region's resilience and ability to adapt to change and have highlighted the importance of working across borders for the greater good. The new international framework re-affirms Greater Manchester's unique value proposition as a top global city trading with partners across the world and reaping the rewards of Global Britain.

The updated 2022 International Strategy published by the GM Combined Authority outlines an ambitious but realistic aspiration to increase exports, putting the City-Region on track to reach the UK's average by 2030.

The outlook for global trade appears positive, however, this progressive target can only be achieved through increasing the number of exporters amongst SMEs and forming a true partnership between public and private sectors building on the world leading capabilities in technology, health innovation, manufacturing and services, becoming once again a powerhouse for growth and prosperity.

2 – A Changing Environment – International Trade and GM

2.1 – National Context and Forecast

A year since the UK left the European Union and almost two years since the COVID pandemic began, the UK Economy and Trade Policy are adjusting to the new circumstances and strive to build back better – and greener.AA

The OBR has forecasted a 6.5% GDP growth for the UK economy in 2021 and a projection of 6.0% for 2022. With the economy contracting by almost 10% in 2020, this is a significant recovery with some sectors like hospitality still in early stages of re-opening post-lockdown.

UK GDP will grow by 7.3% in 2022

(Office for Budget Responsibility)

Public borrowing will also be significantly lower than previously expected for 2020/21 (£355bn or 17% of GDP) and lower still in 2021/22 (£183bn or 7.9% of GDP) although the national debt will remain high in 2021/22 (£2.4 trillion or 98.2% of GDP) following the measures the government took during lockdown to stimulate the economy such as the furlough scheme, bounce-back business loans and increases in the Universal Credit rates.

According to Lloyds Bank Barometer Survey conducted during August 2021, business confidence amongst UK firms rose to 36%, a level not seen since April 2017. This was driven by improvements in companies' trading prospects and expectations of stronger growth in 2022.

The survey identified some concerns around staff shortages, supply chain issues and the current high levels of inflation caused by the increase in fuel and energy rates. However, with the successful vaccine rollout, the removal of lockdown restrictions and adjustment to self-isolation rules, there is optimism that the economy is moving back to pre-pandemic

levels. Confidence increased in nine out of 12 UK regions and nations with the North West showing the strongest increase in the UK (up 26 points to 64%).

2.2 – EU Exit Transition

The challenges of transitioning away from the European Union should not be underestimated both at national and regional levels. Indeed, businesses in the North of England, particularly those in manufacturing industries were expected to be particularly badly affected by exiting the EU, which is the North's largest trading partner.

The Greater Manchester Chamber of Commerce has reported on both the short and long term impact of EU Exit transition amongst its members but the latest economic survey (Q3) shows strong growth with the Greater Manchester Index™ increased by 1.5 points to 31.9 in Q3 with certain challenges still remaining.

The key findings of the QES included:

- Domestic demand has increased in manufacturing and services, but the construction sector has reported a slight decline.
- Brexit related difficulties remain with a significant proportion of internationally active businesses reporting continued challenges in moving good and services.
- The domestic sales balance for manufacturing of +34 is the highest it has been in over five years.
- A third of GM businesses expect to increase prices to meet higher input prices.
- Prospects for employment have improved further.
- A shortage of skilled labour to meet changing business requirements post-pandemic is contributing to recruitment difficulties.
- Both manufacturing and services businesses report improved export sales. It may be a sign that businesses are pursuing international trade opportunities, and in the case of EU exports, adapting to the new requirements under the EU-UK TCA.

Although the EU Exit impact cannot be underestimated, the region is well positioned – with the right investment – to re-balance the UK economy by getting behind profound transformations that are already underway.

According to a Steer Economic Development report prepared for the Growth Company in 2020, the opportunity to boost levelling-up is now even stronger than it was before COVID-19 because the prime capabilities are so well-aligned with post-COVID recovery trajectories. Leaving the EU will help in this context because it has the potential to create new and less constrained regulatory environment and generally stimulates creative thinking and bold ambitions. According to the report "the Northern Powerhouse Trade and Investment proposition demonstrates a combination of ambitious intent and resilient capability".

In August 2021, the Office for National Statistics released its latest trade figures, for the second quarter of this year, to end-June. UK exports to the EU have rebounded by 31.5% since the first quarter of the year (£38.6 billion of UK goods exported to the EU27 in Q2 2021) and exports to the EU are 20% higher than they were five years ago, just before the EU Referendum (UK's sales to the EU in Q2 2016: £32.1 billion vs UK's sales to the EU in Q2 2021: £38.56 billion)

2.3 – COVID Impact

The global impact of COVID-19 has undoubtedly increased the rate of economic change. The two familiar features of long-term economic and technological history are the dramatic acceleration of productivity and innovation during crises, and the strategic investment looking to the future in a changed world rather than backward striving to address historical, now less relevant features.

For example, a regional economic development strategy in the Aerospace industry will be less aligned with future post-crisis conditions than a strategy in the Health Innovation sector.

Across the UK, as the economy and businesses adapt to the "new normal", certain trends are becoming increasingly obvious:



- A greater move towards onshoring and diversification of supply chains and trading markets: This trend helps to boost national crisis resilience via greater industrial self-sufficiency, limits job losses due to global cost-based competition and increases employment prospects via structural change. It can also strengthen national and regional economy multiplier effects.
- De-carbonisation and energy efficiency are becoming significant growth factors. The UK's industrial strategy is driven by the government's role in dealing with issues such as climate change lowering carbon footprint that are both urgent and important.
- A much stronger emphasis on reducing health risks to ageing populations (from 'threats to lifestyle' to 'threats to life'). COVID-19 has highlighted the systemic interdependencies between Health and Social Care settings and other parts of the economy and society.
- An accelerated programme of digital innovation as a substitute for certain types of mobility and as part of a re-balancing work-life relationships. The COVID-19 crisis has placed a greater reliance on remote or hybrid working, including more virtual meetings. This has resulted in reduced levels of national and international travel as well as a negative impact on airlines, hotels, transportation, restaurants and other travel related businesses.

With less time commuting and more restricted spatial movement associated with travel to work, new trends in transport have been identified. However, some of these digitally-enabled shifts are reversing as the

economy reopens. Still, the new more balanced state in terms of time and space utilisation could help to meet de-carbonisation objectives.

These new fundamentals will eventually reach a new equilibrium and may be less radical in the long run than may appear at present. However, they will still be significant for the economy and society. In this transformational context, Northern Powerhouse can have a major influence in strategy formulation for supply chain re-shoring, de-carbonisation, dealing with an ageing economy and shifts in the configuration of the employment market and the economy in general.

In the Greater Manchester City-Region, COVID pandemic consequences have been similar to other NPH regions, with a significant impact on lives and livelihoods and a disproportionate effect on small and medium size enterprises (SMEs). A large number of companies have adopted the hybrid working model where employees are encouraged to work from home for parts of their working week. As a result, companies have downsized or vacated premises, and the vast majority of meetings still taking place virtually using MS Teams, Zoom or similar software.

The UK Government has provided significant financial help with the furlough scheme, bounce-back loans and support for sole traders. The GM Combined Authority and the LEP have also administered millions of pounds in funding supporting regional businesses to save jobs and stay afloat.

However, the lack of international travel and the pause in operations across a number of industry sectors have had a significant negative effect on international trade across the region which is still being evaluated.

2.4 – Climate Change

It is abundantly clear that climate change is not only happening but accelerating with extreme phenomena such as heatwaves, floods and forest fires affecting millions of lives every single day around the world. Climate change is also one of the greatest challenges for the global economy and international trade.

Governments, industry and citizens need to urgently reduce their carbon footprint and limit future



greenhouse gas emissions helping to stop further changes in the climate system.

The UK became the first economy in the G7 to enshrine into law a commitment for net zero emissions by 2050. The UK had already reduced its emissions by 42% while growing the economy by 72% up in the 1990-2019 period and has put clean growth at the heart of its recovering agenda. Experts forecast the number of 'green jobs' to grow to 2m and the value of exports from the low carbon/energy efficiency sector to reach £170bn a year by 2030.

The UK hosted the 26th UN Climate Change Conference of the Parties (COP26) in November 2021. One of the programmes launched was the ambitious Clean Growth export programme offering British businesses the ability to seize the opportunities in the rapidly growing international green sector expected to be worth £1.8trillion by 2030.

With experts predicting that the UK's low-carbon economy could grow by 11% per year between 2015-2030 – four times faster than the rest of the economy – the programme is encouraging clean growth businesses to start exporting their innovation globally. It is expected that the low-carbon economy will deliver up to £170 billion of export sales by 2030, and as the demand for British innovation and green tech increases, DIT wants to lead the charge by stepping up its support for clean growth exporters. By boosting export opportunities, this programme will help create green jobs across the country while speeding up the global transition to a low-carbon economy. It will involve increased promotion of the UK's green export capability by trade and investment teams in embassies around the world and via DIT's digital platforms.

In 2019, Greater Manchester Mayor Andy Burnham pledged to make the region carbon neutral by 2038, 12 years earlier than the target date adopted by the UK Government. Greater Manchester is home to one of the largest low carbon sectors in the UK and has expertise in several key areas such as Nuclear; Power Transmission & Distribution; Smart Grids and District Heat Networks. Greater Manchester has fully embraced the “green recovery” agenda in new low carbon technologies and applications.

2.5 – International Trade Opportunities

There are some exciting opportunities to explore within Global Trade and a recent report from the Board of Trade (Mar 2021) outlines some key points on how a new UK Trade Policy can increase prosperity and create more and better paid jobs.

- **Free and fair trade helps raise global prosperity**

Through increased specialisation and the spread of technological advances around the world, trade has helped raise living standards and lift 1.2 billion people out of extreme poverty since 1990. Countries that have opened up their economies – such as Australia, New Zealand, and Singapore – have benefitted from faster economic growth, higher incomes, and more jobs.

- **Trade-led jobs are vital to the UK economy**

In 2019, the UK was more open to trade than at any point in its history. The UK was the fifth largest exporter in the world and the value of exports equated to almost a third of GDP. Exports supported 6.5 million jobs across the UK's regions in 2016, of which 74% are outside London and the majority (57%) were supported by exports to non-EU countries.

- **Trade-led jobs are better paid and more productive**

It is estimated that median wages in jobs directly and indirectly supported by exports were on average 7% higher than the national median wage in 2016. Goods exporting businesses are also a fifth (21%) more productive on average than those who do not export. 2 million green jobs in the UK in a low carbon sector worth £120bn by 2030.

- **Trade benefits consumers, especially those on low incomes**

Free trade lowers prices, increases consumer choice, and raises the quality of products available to UK consumers. Without trade, the average UK consumer would be a third worse off. Those on low incomes –

who benefit disproportionately from access to tradable goods – would be worse off in the absence of trade.

- **The UK has an opportunity to tap into the fastest-growing markets and sectors of the future**

Almost 90% of world growth is expected to be outside the EU over the next 5 years. The future of the global economy lies to the East in the Indo-Pacific – 65% of the world's 5.4 billion middle class consumers are expected to be in Asia by 2030. Growth in digital trade, services trade, and green trade are all expected to accelerate this decade. The export market opportunity for the UK's green sector is estimated to be worth up to £170 billion a year by 2030.

- **The UK should promote an export-led recovery**

The government should seek to internationalise the economy consider setting an ambitious target to boost exports by 2030.

- **The UK should continue to strike new trade deals to benefit its citizens**

The government should build on the success of the UK Global Tariff and continue to liberalise trade and open up markets around the world in order to cover 80% of UK trade with free trade agreements by the end of 2022 (subject to concluding existing FTA negotiations with the US, Australia and New Zealand)

- **The UK should lead the charge for a more modern, fair and green World Trade Organization**

The government should play a leadership role in retooling the global trading system to unlock the growth potential of services, digital and green trade and challenge anti-competitive practices that distort trade flows, and hardwire fairness into the global trading system.

For a longer-term outlook - not necessarily a forecast due to the many economic, political, technological, and environmental risks and uncertainties that could occur – we can refer to the recent DIT Global Trade Outlook Report (September 2021) projecting:

- Global trade to grow broadly in line with global GDP over the next 30 years doubling in real terms.

- Emerging economies to account for a growing share of trade as economic power shifts East, with the seven largest emerging economies projected to match the G7's import market size by 2050.

- Service sectors expected to account for 28% of global trade by 2030 (25% in 2019)
- Global trade to be more widely distributed. 70 high income countries will share 80% of global import demand by 2030. In 2019, 60 countries accounted for 66% of global import demand.
- The UK to remain one of the top 10 trading nations globally up to 2050. UK exporters are well-placed to capitalise on populations getting richer with a trend towards more high value goods and services that UK businesses specialise in. However, the report projects a fall in the UK's overall global exports from 3.6% in 2019 to around 2.6% by 2050 mainly due to rapid trade growth in other regions.

The new UK Export Strategy published in November 2021, introduces a 12-point plan outlining the role of government supporting businesses across all UK regions with their export operations.

The plan's highlights include:

1. Export Support Service

The new Export Support Service (ESS) was launched in October 2021 to support businesses exporting to Europe with over £45 million in funding awarded over the Spending Review 2021 period for the digital transformation of DIT's export support services.

2. Supporting exporters across all parts of the UK

DIT has opened new offices in Scotland, Wales and Northern Ireland, and a second HQ in Darlington, with dedicated teams that will extend the opportunities from the government's international trade work across the UK, levelling up export growth and supporting jobs.

3. Financial support for exporters

Through the European Regional Development Fund (ERDF), the Internationalisation Fund is providing 7,600 exporting SMEs in England with financial assistance.

4. UK Export Finance

The UK Export Finance (UKEF) agency will expand its products and delivery network to boost support to UK exporters and their overseas buyers.

5. Government-to-government partnerships

A renewed focus to connect governments and business through the UK's global networks.

6. UK Export Academy

Extend the reach and range of the Export Academy to offer bespoke training programmes and digital tools



to help businesses exporting and find opportunities overseas.

7. Exporting networks across the UK

Expand the community of Export Champions, ensuring businesses can build and learn from exporting successes through business-to-business networking and peer-to-peer learning.

8. Export Campaign - Made in the UK, Sold to the World

Champion priority sectors (Agri-food and drink, financial, professional and business services, creative industries, education, tech and digital, consumer and luxury goods, clean growth) through the campaign Made in the UK, Sold to the World.

9. New UK Trade-show Programme

Pilot a new UK Trade-show Programme (UKTP) to promote Team UK at the world's largest trade-shows.

10. Making exporting easier

Put exporting at the heart of reforms to regulation, cross-government measures and regulatory diplomacy to help exporting businesses to thrive.

11. Global reach

Utilise the UK government's international teams based in over 180 markets to provide sector and market specific support to innovative, high growth companies to help them grow internationally.

12. Opening markets worldwide

Continue to open new markets for UK exporters through our new trade deals, with the ambition of covering 80% of UK trade by the end of 2022, and broader work to remove market access barriers.

2.6 – Levelling Up Agenda and Northern Powerhouse

According to the Institute of Fiscal Studies (IFS Green Budget 2020), the UK is one of the most geographically unequal countries in the developed world on most measures of regional economic activity. These include earnings, wealth, health, educational attainment and social mobility across the country.

The government's "Levelling-Up" policy is a long-term, multifaceted agenda that includes a more equally distributed economic growth, reducing the disparities between the South East and the rest of the country and also within regions where inner-cities tend to perform better than rural areas.

The Northern Powerhouse (NPH) is the government's vision for a super-connected, globally-competitive northern economy with a flourishing private sector, a highly-skilled population, and world-renowned civic and business leadership (northernpowerhouse.gov.uk)

It forms part of the government's industrial strategy which is building on a strong economy and helping businesses up and down the country seize the opportunities presented by leaving the EU.

The Northern Powerhouse footprint includes all 11 Northern Local Enterprise Partnerships (LEP) areas as well as North Wales. The 11 Northern LEPs are: Cheshire and Warrington, Cumbria, Greater Manchester, Humber, Lancashire, Leeds City-Region, Liverpool City-Region, North East, Sheffield City-Region, Tees Valley, York, North Yorkshire and East Riding. North Wales is defined as covering: Wrexham, Rhyl, Colwyn Bay, Llandudno and Bangor.

Northern Powerhouse Trade and Investment Proposition

According to the Northern Powerhouse Trade and Investment Proposition produced by Steer in January 2020, the North's export ambitions are to:

- Raise export levels to 30% of the Northern Powerhouse's GDP by 2030, and strive to hit the UK target of 35%;
- Reduce the North's dependence on domestic markets by matching the UK average of 10% of firms exporting, through the internationalisation of the North's economy.

The North's export objectives are to deliver an additional:

- 12,000 businesses engaged in exporting by 2030 – these may be new start-ups or existing businesses – to help to close the gap of 72,000 exporting firms;
- £10bn of GVA a year by 2030 through export growth – over 10% of the additional GVA generated in the Transformational Growth Scenario.

Proposed NPH strategic actions relating to trade:

- Research & Innovation Zones with tax/grant incentives based on the four Primes (Advanced Manufacturing; Energy; Health Innovation; and Digital)
- Freeports based on investment and trade opportunities associated with the four Primes;
- Global Prosperity Fund (GPF) opportunities for Northern Powerhouse businesses to support exports and overseas direct investment by leveraging existing programmes;
- Northern Powerhouse 'proofing' of future UK trade deals to identify positive and negative risks arising from new trade deals when the UK exits the EU; and
- Northern Powerhouse trade and investment propositions for Sector Deals

Proposed NPH Operational Actions relating to trade:

- Accelerating the growth of current exporters: – Northern Powerhouse Global Scale-up programme to complement DIT offer;
- Supporting new exporters: – Internationalisation of mainstream business support including start-up support to increase the percentage of firms exporting;
- Cross-cutting enabling activities: – Brand development and promotion; – Dedicated Northern Powerhouse Officers embedded DIT's Overseas Posts; and
- Northern Powerhouse International Connectivity to facilitate trade and investment.

Northern Powerhouse Prime Sectors

According to the Northern Powerhouse Independent Economic Review (NPIER) of 2016, there are four 'international-class' pan-Northern 'Prime Capabilities' which drive the North's productivity: Advanced Manufacturing Processes and Materials; Energy; Health Innovation; and Digital (Steer, 2020)

The four Prime sectors include:

- Advanced Manufacturing Processes and Materials: Automotive, Aerospace, Offshore Engineering, High Precision Engineering, Chemicals, Marine Engineering, and Graphene and Advanced 2-D materials;
- Energy: Generation, storage, and low carbon technologies and processes; in particular, Nuclear Energy, Offshore Wind Energy, and battery technologies;

- Health Innovation: Life Sciences, Medical Technologies and Devices, e-health and service delivery, and Stratified Medicine; and
- Digital: High-Performance Computing, Cognitive Computation, Data Analytics, Simulation/Modelling, Machine Learning, and Media.

With supporting enabling capabilities:

- Finance, Business and Professional Services;
- Logistics; and
- Education – particularly Higher Education.

2.7 – GM Economic Vision, Recovery Plan and Innovation

Economic Vision

Greater Manchester is at the centre of the Northern Powerhouse region and is poised to lead UK economic recovery with a plan for innovation, green growth and addressing inequalities.

"I want to ensure Greater Manchester's businesses are ready to realise the benefits of international trade".



Cllr Elise Wilson, Leader of Stockport Council and GM Portfolio Lead for Economy & Business

The Greater Manchester City-Region is a vibrant network of interconnected towns and cities comprising 10 metropolitan boroughs: Bolton, Bury, Oldham, Rochdale, Stockport, Tameside, Trafford, Wigan, and the cities of Manchester and Salford.

The 2020 Economic Vision published by the Greater Manchester Local Enterprise Partnership states:

- We will build again on our heritage of innovation to drive economic and social advance.
- We will drive an economic recovery that puts people first, embraces the benefits of diversity, rebalances inequalities, creates lasting resilience, supports the move to net zero carbon and rethinks productivity
- We will be recognised around the world for our global strengths and progressive thinking in advanced materials and manufacturing, health innovation, digital and creative and clean growth.

Recovery Plan

The new recovery plan for a GM economic recovery promises to “not build back to normal, but building confidence to move forward to greater” through:

- Delivering the UK’s most integrated place-based innovation ecosystem to drive economic and social renewal nationally, in the North and locally;
- Using Greater Manchester assets to put the UK at the forefront of global innovation in key areas such as health, digital, clean technologies and advanced manufacturing and materials;
- Recognising the role played by the VCSE sector in using enterprise to create positive social change;
- Driving rapid innovation and use R&D investment to support economic growth across towns and cities in all parts of Greater Manchester, establishing resilient places where people want to live, work and invest;
- Delivering productive, job rich, fair employment – enabling people to ‘level up’ to their full potential;
- Tackling inequalities, embrace diversity and recognise the importance of civil society -creating a society that works for everyone driven by business with an understanding that looking after people and the planet is good for productivity and profitability;
- Enabling new public and private investment, leveraging our unique history of integrated partnership, leadership, devolution, governance and delivery;
- Evolving our relationship with Government – for the benefit of the UK, the North and Greater Manchester.

GM Innovation

Innovation Greater Manchester is a blueprint for a partnership with Government to stimulate R&D investment and level up the North which could generate a £7 billion economic benefit and create up to 100,000 jobs across the city-region.



Led by business, scientific, academic and local government leaders, Innovation Greater Manchester is a model for leveraging science assets and strengths to support innovation-led business growth in Greater Manchester, the North West, and the wider North. It forms a key part of the Economic Vision – the plan to deliver a fairer, greener and more productive Greater Manchester economy beyond the pandemic.

Among its proposals are the creation of a single umbrella group bringing together local and national partners from the public and private sectors that have a stake in Greater Manchester’s innovation ecosystem, and a six-year, multimillion-pound Innovation Transformation Fund.

The blueprint also envisages a network of Innovation Zones that link labs and research institutions to industry in city centres, town centres and advanced manufacturing parks across Greater Manchester. Innovation Zones would ensure the growth fuelled by innovation brings economic and social benefits to every district, resulting in updated skills, good employment and places where people want to invest.

Collaboration supported by the Innovation Greater Manchester partnership would help commercialise the pioneering work done within the city-region’s world-leading universities and research institutions, turning this research into viable businesses that create high quality jobs and attract investment. It is closely aligned with UK national policy which seeks to

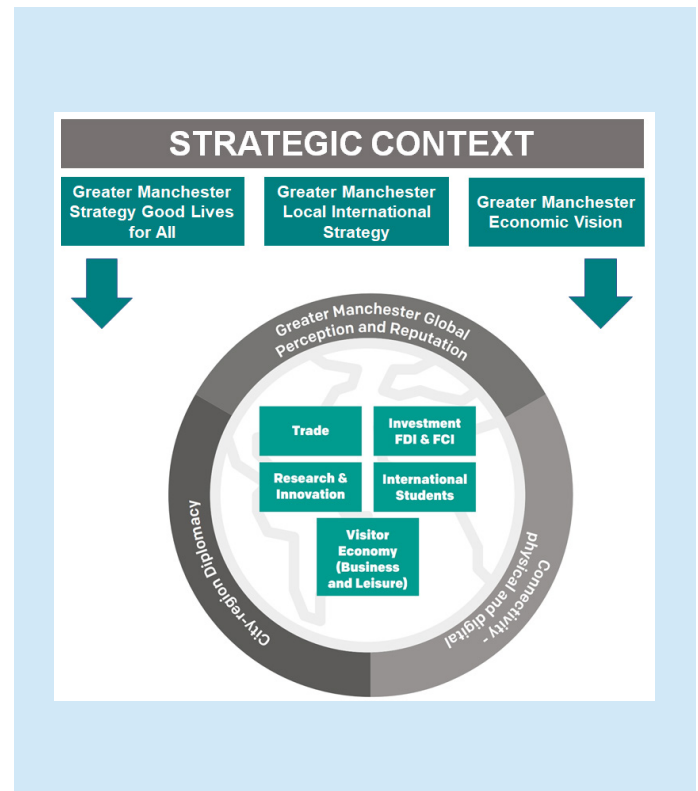
deliver the Government's laudable aims of achieving 2.4% of GDP related to R&D, establishing the UK as a science superpower and supporting international trade through global Britain.

2.8 – GM International Strategy

The GMCA and LEP have developed a long-term vision and refined strategic framework which brought together a shared international narrative for GM.

The updated International Strategy (2021-2024) published by the GM Combined Authority identifies some key strategic objectives to enable the City-Region to achieve its global trade targets:

- Work with national government on the development and delivery of the new national and regional export strategies, coordinating efforts to identify sector and market opportunities for the city-region in tandem with the Northern Powerhouse.
- Continue to support GM exporters to understand the opportunities and challenges emerging from EU Exit and COVID, ensuring, where possible, that GM maintains export market value share within top markets such as the EU, the United States and China.
- Continue to monitor the development of UK Free Trade Agreements and consider what they mean for GM's business base and export market diversification. GMCA will continue to work with UK government and DIT to promote them and encourage businesses to explore a wider variety of international markets.
- Coordinate efforts across Greater Manchester to improve international trade intelligence, including developing a list of new high growth exporters and exploring the opportunity to commission a piece of research to better understand the export productivity gap and future opportunities.
- Continue working to create a fully integrated business export offer through strong joint working with the Department for International Trade, Greater Manchester Chamber of Commerce, and the business organisations. This will include delivery planning, sharing of sector/market expertise and maximising 'Northern' export presence at key missions and events as well as maximising the level of intensive support to exporters and ensuring they have the tools and resources to expand into new markets.
- Work in partnership with the FCDO and DIT to develop and enhance existing relationships with the UK's priority markets including the US, Japan and EU, leveraging the region's existing relationships and city-to-city links and political leadership to support exporters in accessing new opportunities overseas.
- Work in partnership with DIT and the UK Embassy network overseas to deliver Mayoral missions to Ireland, Bangladesh, Pakistan, Japan, India and the US over the next three years, ensuring that Trade sits as a central priority and GM businesses are presented with new opportunities.



2.9 – Inward Investment

According to DIT's Inward Investment Report 2020/21 and the EY UK Attractiveness Survey 2021, the UK has been declared as the best place in Europe to invest and one of the most attractive in the world for inward investment. In 2020–21, over 55,000 jobs were created from 1,538 new Foreign Direct Investment (FDI) projects. The UK's attractiveness to foreign investors is due to the high skills and low tax economy in the UK and with a new independent trade policy and c.70 new Free Trade Agreements (FTAs), levels of FDI are forecasted to increase and have a positive impact on productivity, Gross Value Added (GVA), employment and average wages.



It must be acknowledged that the past 18 months have seen considerable changes for businesses, with the end of the EU Exit transition period and the COVID-19 crisis that presented a unique challenge for international investment. Accordingly, global FDI decreased by 35% in 2020. However, UK businesses have been resilient and although UK FDI projects had been forecast to fall by up to 45% in 2020, they only decreased by 17%. UK tech companies also attracted a record \$15billion in venture capital funding last year, leading to the creation of seven 'unicorns' valued at more than \$1billion.

The UK hosted The Global Investment Summit in October 2021 as part of the mission to increase foreign investment in the green industries of the future as well as the 26th UN Climate Change Conference of the Parties (COP26) in Glasgow in November 2021 to champion clean growth.

In Greater Manchester, MIDAS is the inward investment promotion agency part of The Growth Company, with a strategic aim to secure significant levels of new investment for the City-Region to create and safeguard jobs. This is achieved through the global business marketing of Manchester's key sectors and the provision of an extensive package of free advice and assistance for potential investors and location consultants.

According to IBM's Global Location Trends Report 2019, Manchester is the 12th most popular global destination for FDI.

2.10 – Free Trade Agreements

Since leaving the EU in Jan 2021, the UK has been negotiating Free Trade Agreements (FTAs) with countries around the world aiming to reducing or eliminating tariffs or removing quotas when trading goods.

The UK has so far signed FTAs with almost 70 countries including the EU. Most of these FTAs replicate or build upon the deals the EU has in place with those countries.

The UK-Japan Comprehensive Economic Partnership Agreement (CEPA) goes further than the deal the EU has with Japan, including digital and data provisions as well as intellectual property rights.

The FTA with Australia is the first trade deal negotiated from scratch and the full terms will be published before end of 2021.

The UK is negotiating new trade deals with New Zealand, USA, Mexico and Canada and trades on WTO terms with most other countries where a trade deal is not in place yet.

The UK has applied to join the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), one of the largest free trade areas in the world with £9 trillion in GDP (2019) across 11 countries in the Asia Pacific region and the Americas. CPTPP members' economies accounted for £110bn worth of UK trade in 2019 and growing 8% every year.

The UK has bilateral trade agreements with 7 of the 11 CPTPP nations but the Partnership goes beyond the provisions of those agreements in many areas. The Philippines, Thailand, Taiwan and Republic of Korea have all expressed an interest in joining the Partnership which is expected to boost UK trade further in the near future.

2.11 – Universities

Greater Manchester universities make an important contribution to international trade through their students and alumni, research activity, and innovation activities. In 2018/19, the City-Region attracted 19,700 international students (with 73% of these studying at the University of Manchester). Research by the Higher Education Policy Institute shows that each non EU overseas students contribute £95,000 net to

the economy and EU students contribute £65,000 net, meaning that in 2018/19 the total impact of international students on Greater Manchester was £1.7 billion. Hosting international students also creates longer-term investment, business and trade links – there are over half a million alumni of Greater Manchester universities around the world which is a major resource and opportunity to capture.

International students also create wider cultural and societal impacts associated with a more diverse population. The growth in attracting international students over the past decade in Greater Manchester has been a major UK international trade success story and it will be important that Greater Manchester continues to be a welcoming, stimulating, and exciting place for young people and adults to study.

The concentration of nationally and internationally leading science in Greater Manchester's universities – in global growth sectors such as advanced materials, health innovation, biotechnology, digital and energy – drives collaboration with researchers in institutions and businesses in overseas markets, creating new ideas and new strategic and commercial opportunities. Universities have strong existing strategic partnerships to key growth markets including China and the US. The spin-outs and start-ups created by the City-Region's universities are typically rich in intellectual property, creating new products and services that are competitive on the international stage. The concentration of scientific excellence, research and graduate talent, and commercial opportunities presented by the region's universities is a key driver of inward investment. Capitalising on the assets and capabilities of the City-Region's universities will be critical to growing international trade from the region.

Greater Manchester has the largest international student population outside London with over 19,000 students from outside of the UK coming from over 160 different countries. In 2018 and 2019, 19% of Greater Manchester's total student population came from outside of the UK and made up 4% of the UK's total international student population.

2.12 – Connectivity

Manchester Airport is the third largest airport in the UK, behind Heathrow and Gatwick and more than double the size of both Birmingham and Edinburgh. With 29 million passengers per year it is one of the fastest growing major airports in Europe.

Manchester Airport is well served by major road and rail networks and is easily accessible to the 22m people that live within a 2-hour drive.

Manchester Airport's catchment area complements that of Heathrow with minimal overlap between the two-hour drive times of the two airports.

Aviation connectivity decreased through the COVID 19 pandemic, as countries closed borders and travel restrictions were put in place.

Connectivity is likely to take time to rebuild and airlines are initially focusing on higher-yield short-haul routes, known to be popular destinations for British tourists.

Evidence has also shown that regions outside of London and the South East have had a greater reduction in capacity, notably on long haul routes, in 2020.

Another challenge Manchester Airport and aviation in general face is finding ways to reduce CO2 emissions. In October 2021, Manchester Airport Groups (MAG) announced that it will provide passengers the ability to offset the carbon emissions from their flights, just another ambitious project in the airport's commitment to becoming a Net Zero Carbon business by 2038.



3 – GM Exports - Statistics

According to the GM Chamber of Commerce Analysis of HMRC/Regionals Statistics, the North West reported a total of 15,894 Exporters in 2020 (down from 16,502 in 2019), ranking the region 3rd in the UK with 11% of all businesses exporting.

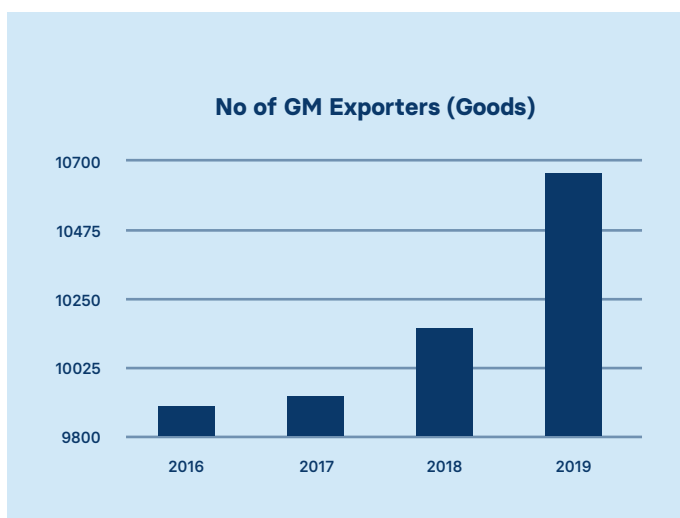
In terms of Exports Goods value, the North West generated £24.3bn (down from £27bn in 2019) placing it 6th amongst other UK regions with 8.3% of the total.

The total export value in Greater Manchester is c. £15bn with £6.6bn (44%) coming from Goods Exports (2019) and £8.4bn (56%) generated by Services Exports (2018).

According to the GM Business Survey 2020, one in seven GM businesses (14%) reported that they exported. The Creative and Digital sector has the highest proportion of exporters (26%), followed by manufacturing (20%). Exporters are more likely to be located in Manchester (23%), Trafford (16%) and Stockport (15%).

3.1 – GM Exports for Goods

The number of exporters for Goods in the GM City-Region has increased steadily to 10,673 in 2019 from 9,894 in 2016.



Data on GM Services Exporters is not currently available.

The value of exported goods has decreased from £6.75bn in 2018 to £6.6bn in 2019 and we expect a drop of c.15% for 2020 as the full impact of the COVID pandemic and the EU Exit transition is becoming apparent.

Although some businesses are still finding exporting challenging due to new regulations with the EU and additional paperwork as well as the global shortage of containers, availability of HGV drivers, increasing cost of international trade and oil price, most companies have begun adapting to the new rules and regulations.

In 2021, following a very poor Q1 to the year, the value of Goods Exports has recovered with confidence amongst traders and advanced orders on the increase.

In terms of industry sectors split, Machinery and Transport Equipment (£1.8bn) remains the largest exporter followed by Miscellaneous Manufactured Articles (£1.5bn) with Chemicals and Related products (£1.3bn) completing the top three (2019 figures).

3.2 – GM Exports for Services

Services data is limited and regional statistics have a 12-month lag behind the Goods data. However, the trends for UK data should also apply in Greater Manchester to help us understand how Services have been impacted by the pandemic and EU-exit transition.

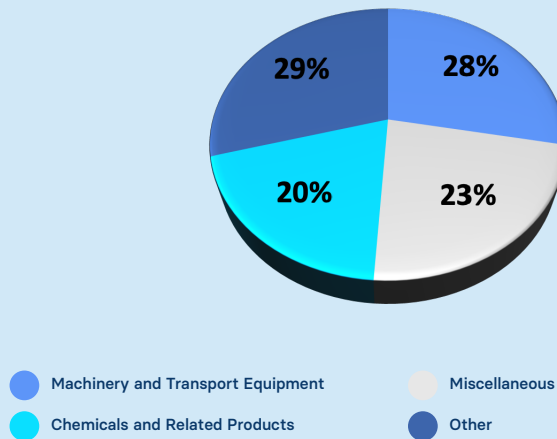
The value of exported services has increased from £8.4bn in 2019 to £8.8bn in 2020.

GM's largest services exporter industry is Financial and Insurance Activities (£3.1bn - 35%), followed by Other Service Industries (£1.6bn - 18%). Transportation and Storage (£1.3bn - 15%) and Real Estate, Professional, Scientific and Technical Activities (£1bn - 11%) complete the top four industry sectors.

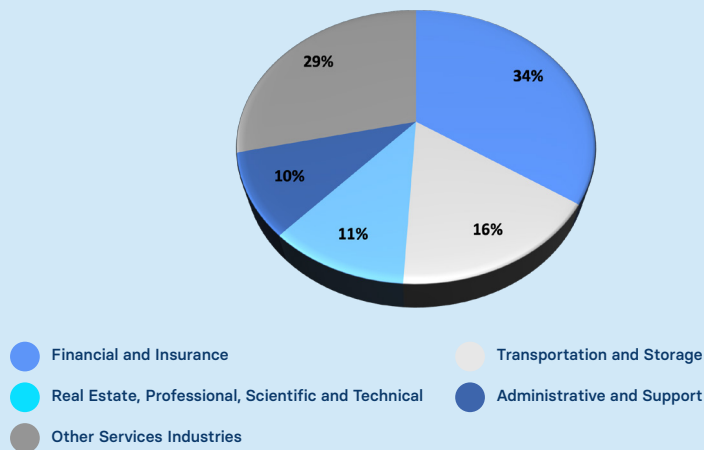
Considering the strengths of the region and global trends for potential Services export growth, the main sub-sectors where GM can capitalise on in 2022-2024 are:

- Fintech
- Online Gaming
- E-commerce Software / Mobile Apps
- Business, Financial and Insurance Services
- e-Health

GM Goods Export Sectors by Value (2019)



GM Services Export Sectors by Value (2018)



3.3 – Primary Industry Export Sectors

The Greater Manchester Trade Group has identified seven Industries that are classified as Primary Industry Export Sectors. These sectors show significant Export Growth over the years or have high potential to contribute greatly to GM's total exports over the next 3 years.

Advanced Materials

Greater Manchester has an enviable global reputation for the development and production of Advanced Materials with world leading science around the National Graphene Institute and the Graphene Engineering Innovation Centre that includes Partners such as GKN Aerospace, First Graphene and Qinetiq. Other leading Advanced Materials centres include the Sir Henry Royce Institute partnering with the University of Manchester and another five leading UK Universities as well as the UK Atomic Energy Authority, and the International Centre for Advanced Materials (ICAM) partnering with BP, University of Manchester and other leading Universities.

Health Innovation

With four leading Universities leading in R&D, Greater Manchester has the 2nd largest concentration of health research and innovation centres in the UK after the South East of England. Located within Manchester University, the Citylabs campus is home to a cluster of diagnostics, medtech, digital health and genomics businesses whereas Manchester Science Park is home to an innovation community of some of the region's most disruptive, fast-growing science and tech businesses including NorthWest EHealth, Lucid and LIG Biowise.

Creative, Media, Digital and Technology

One of the fastest growth sectors in the region worth in excess of £5bn with the globally recognised cluster in broadcasting, content creation and media at Salford Quays/Media City and the new cybersecurity and digital technology centres in Manchester City Centre. The BBC, ITV, Ericsson, Dock 10, GCHQ and many other organisations have invested in Manchester for their UK bases.

Business, Professional and Financial Services

This is the largest Services sector and the largest employer in the region with bank headquarters, insurers, accountancy and consultancy firms as well as some of the UK's top law firms based in the city-region. The Co-op Bank and Handelsbanken have UK headquarters in Manchester with Barclays, RBS and Lloyds also maintaining large operations in the region. The Hut Group is an e-commerce success story operating over 100 international websites. Arup one of the world's leading infrastructure and engineering firms has a significant presence in Manchester.

Manufacturing

As the region where the first industrial revolution begun in the 18th Century, Greater Manchester has kept innovating and developing new manufacturing processes exporting products and technical know-how across the world. Specialist/Niche opportunities include: Semi- Conductors; Composites and Coatings; Process Metallurgy (exploiting links to defence); Food and Drink; Automotive/Transport; Aerospace and Life Science supply chains. Siemens, Mettler Toledo, Hyde Group, Balfour Beatty, Cargill, AECOM and BAE Systems are some of the best-known manufacturers in the region with significant export sales.

Chemicals

This represents the 3rd largest Exports Goods sector worth £1.3bn per year across Greater Manchester. The region's expertise in the sector comes from niche/specialist chemicals and related products with companies such as Luxfer, Valtiris, Libra and McBride to name but a few.

Food & Drink

This growing sector includes global brands such as Kelloggs with its HQ in Manchester and other well known brands such as PG Tips, Patak's, Warburtons, Heinz, Uncle Joe's Mints, Duerr's Jam and Soreen's Malt Loaf, all with existing or high export potential.

Low Carbon/Clean Energy

One of the fastest growing sectors where the technical know-how and capability is in great demand worldwide. Greater Manchester boasts the largest low carbon sector in the UK outside London and the South-East. The region has many world-leading research facilities and dedicated 'living labs' which provide businesses with controlled and real-world environments to test and trial new low carbon innovations.

Innovative companies in the sector include Trilar, using solar power to make HGV, coaches and commercial vehicle fleets more energy efficient, First Graphene developing applications for using the 2D super-material that is Graphene to improve energy storage in batteries and super-capacitors and the Manchester Fuel Cell Innovation Centre researching applications for harnessing renewable energy and generating hydrogen for use in fuel cell technology.

3.4 – Export Markets

Germany is the largest Export Partner to Greater Manchester accounting for £805m trade in 2019 or 12% of GM's exports. Ireland accounts for 10% of GM's exports or £680m worth of trade followed up by the USA with £641m also 10% of GM's export value.

GM exports £3.8bn (58%) worth of goods to the EU and £2.8bn (42%) worth of goods to Non-EU countries.

GM exports £5.3bn worth of services to non-EU countries and £3.5bn worth of services to EU countries.

Country	Value of Goods Exports (£millions)
Germany	805
Irish Republic	680
USA	641
France	466
Netherlands	308
Italy	263
Belgium	260
China	253
Spain	234
Poland	161
Sweden	130
Other Asia and Oceania	111
Turkey	106
India	90
Denmark	73
Hong Kong	63
South Korea	52
Russia	45
Pakistan	27
Vietnam	25

Priority Export Markets

The new status quo defined by the EU Exit and COVID-19 has necessitated a reset on how the City-Region views, engages and trades with the world. The UK Government's new Free Trade Agreements (FTAs) also offer substantial opportunities with markets such as Japan, Mexico, New Zealand and Australia where tariffs, quotas, legislation and other factors proved to be significant trade barriers between the UK and those markets.

Greater Manchester's priority international Export markets have been identified according to the strongest historical bi-lateral trade and growth opportunities.

EU 27

The EU 27 as a whole is Greater Manchester's largest trading region accounting for 58% of trade in 2019 with a value of £3.8bn of Goods exported. For Services, the EU27 represented 40% of total value exported.

USA

There is a strong trading relationship with this growing market but the USA represents only around 10% of all GM Exports. A future trade Agreement with the world's largest economy would significantly increase trade for the Greater Manchester City region.

China

Over the past six years the North West's total exports to China exceeded £10bn. In 2019, the annual total for the region was £1.5bn. GM Businesses exported goods and services worth £942m to China in the same year. Higher education and low carbon energy services are the most popular services exported.

India

The total trade value with India for NW businesses reached £1bn in 2019 compared to £887m in 2015. In Greater Manchester, Exports to India amounted to £90m in 2019 rising from £75m in 2016. Health innovation, advanced manufacturing and energy are the three main sectors of India's imports from GM.

Opportunity Export Markets

Based on recent trade performance, new national trade policy and free trade agreements (signed or expected by end of 2021), Greater Manchester should also consider exploring further future opportunities with Japan, Canada, Australia, South Korea, New Zealand and UAE. These fast-growing markets totalled £4bn in Exports for Greater Manchester businesses with additional investment opportunities and research partnerships to boost the trading relationships. Advanced Manufacturing, Financial and Professional Services and Creative, Digital and Technology are the main Export sectors to these markets.

The Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) is a trade agreement between 11 Pacific Rim nations: Australia, Brunei, Canada, Chile, Japan, Malaysia, Mexico, New Zealand, Peru, Singapore and Vietnam. The UK wants to join the alliance which would benefit Greater Manchester exporters especially in Machinery

Manufacturing and Health Sector expand their supply chains. And as the Partnership grows, new opportunities in the services and digital trade could be exploited by firms in the region.

Markets to Monitor

A significant amount of uncertainty and anticipated change remains in global trade, and policy makers cannot solely rely on past data to predict future opportunities. As clarity emerges, we must monitor the global implications of COVID-19 and new relations with the EU on our global target markets.

Although not contributing greatly to Exports historically, some international markets are registering fast growth in their trade with the North West and Greater Manchester over the past three years. The GM Chamber of Commerce suggests that a new category should be introduced to “monitor” the trends for markets such as Middle East, Turkey, sub-Saharan Africa, LATAC and Asia & Oceania.





4 – Export Strategic Enablers

4.1 – Digitalisation

Greater Manchester City-region is committed to being a digital city-region that puts residents at the heart of its growth plans and is working towards an ambition to be recognised as a world leading digital city-region.

In February 2020, the Combined Authority launched the new Greater Manchester Digital Blueprint, which sets out a three-year approach under a single framework allowing the City-Region to grow its international ambitions.

It identifies five digital priorities, namely:

- 1. Empowering People:** Ensuring everyone in Greater Manchester whatever their age, location or situation can benefit from the opportunity digital brings
- 2. Enabling Innovative Public Services:** Apply exemplar digital ideas and practice to deliver public services in Greater Manchester, linking innovative business, academic and public sector thinking with the needs of Greater Manchester's people
- 3. Digitally Enabling All Businesses:** Businesses of all sizes should have the means and skills to digitise their business and make the most of the opportunities that brings
- 4. Creating and Scaling Digital Businesses:** Encouraging and supporting businesses to start, grow or move to Greater Manchester, recognising the importance of the continued expansion of the digital, creative and tech sector and the opportunities this brings for people.
- 5. Being a Global Digital Influencer:** Greater Manchester is taking its position as an internationally recognised centre of digital innovation, research and practice.

Digital connectivity and infrastructure are pre-requisites for the City-region to remain internationally competitive and fulfil its international ambitions. The experience of the pandemic has led to increased acceptance and acceleration of digital adoption in our daily lives. Social distancing measures and travel restrictions meant that some international events and conferences previously held physically moved to online platforms, universities are adopting a blended learning approach and the leisure and tourism industry has become even more reliant on digital booking platforms.

In terms of trade, the use, intelligence and functionality of e-commerce platforms have

developed exponentially and have overcome a number of trade barriers previously significant obstacles when entering a new international market.

The region's recognised digital technology and cyber-security strengths make it ideally placed to capitalise on these opportunities. However, the sheer abundance of information, platforms and other trade tools available online can make the task of identifying a suitable solution to new exporters' needs daunting.

Technology Adoption Service

The Technology Adoption Service is a brand new website platform that enables businesses to search for, discover and compare tech tools to make improvements and efficiencies in the day to day running of their business operations.

It is supported by the Greater Manchester Combined Authority and Greater London Authority and is offered as a free-to-use service to help small businesses grow.

Technology can help with a number of business objectives, whether it is gaining more sales and customers, improving communication, working better from home, or spending less time on paperwork and increasing productivity. For example, an e-commerce solution would help sell products or services online, accounting software can automate invoicing and sales software can improve customer support services.

Export Digital Portal

It has been widely acknowledged that there is a need for a new, all encompassing online platform accessible to any GM business seeking information on international trade for a specific region or industry sector.

This new portal would provide a "single click" overview to all available resources for the region or market in question bringing together useful content from DIT, the Chamber of Commerce, third party organisations, trade bodies and others offering their expertise. There would also be case studies and testimonials from existing local traders sharing their insights for that region/sector, links to register for an International Trade Advisor (ITA), download relevant forms from the Chamber's website and other essential resources to support GM companies on their export journey. Such a project has not yet been materialised due to funding issues but also due to the difficulty in assigning an "owning/managing" trade body or organisation.

“Using green technology is crucial to combating climate change. Through opening up new markets and providing export support, our Clean Growth programme will help unleash the potential of UK businesses who are creating ground-breaking innovations in this area”.



The Rt Hon Anne-Marie Trevelyan MP, Secretary of State for International Trade

4.2 – Decarbonisation

Green Trade in the UK

According to the Board of Trade’s Green Trade Report (July 2021), the UK should build on its existing activity and lead the charge in using trade policy to protect the environment. The Board of Trade’s view is that:

1. The UK should use its Global Britain platform to encourage international ambition on green trade and shape the 21st century international trading system to better support the global effort to tackle climate change and nature loss.

With a growing global consensus on the need for climate action (net-zero pledges cover more than 70% of global GDP) and the need to ‘build back greener’ from the COVID crisis, there is momentum on which to build the case for reshaping the existing rules.

2. The UK should advocate for making green trade freer and consider all options for advancing environmental goods and services liberalisation.

The UK should consider how to further promote liberal green trade by using its membership of TESSD to re-launch discussions on the Environmental Goods Agreement, by helping shape green policies as part of the Government Procurement Agreement at the WTO, so that Government levers are used to increase the use of green products and services.

3. The UK should advocate for making trade fairer, making astute use of its trade levers to help address environmentally damaging market distortions.

Global problems like climate change and nature loss, require global solutions. When seeking to address market distortions the UK should consider:

- deploying its diplomatic and/or regulatory diplomacy tools as a priority to encourage environmental action alongside considering proportionate use of trade policy
- deploying its trade levers where evidence points to a clear need for action and in a manner that is consistent with the UK’s international obligations
- developing trade policy solutions (if required) that draw in large numbers of countries, ideally developed at the multilateral or plurilateral level
- using bilateral trade levers – including FTAs – to safeguard the UK’s existing environmental standards, promote sustainable trade and, where possible, raise environmental standards
- pursuing unilateral action in limited circumstances, in a way that ensures trade remains fair
- steering the global debate on carbon leakage, by applying the above policy approach in practice

Green Exports in the UK

The UK already has existing strengths as a green exporter. The government's clean growth strategy estimates that the UK's low-carbon economy could grow by 11% per year between 2015 and 2030 – 4 times faster than the rest of the economy – and deliver between £60 billion and £170 billion of export sales of goods and services by 2030.

The global green transition means that commercial export opportunities will continue to grow rapidly in the coming decades. One sector of industrial strength that is growing particularly quickly is clean energy technologies, which could become one of the largest green economic opportunities for the UK. Electric vehicles are already a sizeable export, and could support £11 billion of gross value added per year by 2050, alongside other green sectors including Carbon Capture Usage and Storage (CCUS) and offshore wind.

Hydrogen could also be a future sector of UK strength, given the complementarity with the UK's existing oil and gas industry. The UK already has expertise in hydrogen – including through electrolyser and fuel cell companies such as ITM power.

In addition, the UK's natural CCUS storage assets – including its offshore saline aquifers and depleted oil and gas fields – provide significant potential for CCUS-enabled hydrogen. These capabilities should support the UK's efforts to develop 5GW of domestic low carbon hydrogen production capacity by 2030 and may enable the UK to export excess green energy produced from offshore wind. Hydrogen has a wide range of uses and represents a diverse market opportunity – including for heating and cooling, industrial decarbonisation, and powering heavy vehicles.

As well as offering commercial returns for the UK, green exports are a key route through which the UK can help speed the global green transition. The UK's green exports are already helping to spread green technology around the world.

How the UK Government is supporting the UK's Green Export Growth

- Capitalising on the UK's global platforms – The Department for International Trade will use the pavilions at COP26 and the Dubai Expo to showcase the UK's green and innovative companies and bring business leaders and

international partners together to create new partnerships.

- UK Export Finance (UKEF) – The UK's export credit agency has capacity to deploy over £2 billion of direct lending to finance clean growth projects, and a suite of products such as the Export Development Guarantee to support UK companies to transition towards low-carbon business models. UKEF is actively seeking renewable energy projects overseas and has already doubled its support for sustainable projects to £2.4 billion.

Greater Manchester's target is to be a carbon neutral City-Region by 2038.

Greater Manchester's Net Zero Journey

In 2019, Greater Manchester Mayor Andy Burnham pledged to make the city-region carbon neutral by 2038 – 12 years ahead of the target date adopted by the UK and European Commission. This milestone for GM to make a positive international impact includes a 5-year environment plan developed following consultations with 1,800 residents and representatives from the region's private and public sector.

The 2019-2024 includes a commitment to invest in renewable energy on buildings (new and retrofit) as well as a proposal to substitute fossil fuels with low-carbon energy alternatives.

Greater Manchester is home to the largest low carbon sector in the UK outside London and the South-East. The region acts as an 'Innovation Test Bed' with many world-leading research facilities, state-of-the-art science parks and dedicated 'living labs' which provide businesses with controlled and real-world environments to test and trial new low carbon innovations.

Greater Manchester has expertise in several key areas:

Nuclear: Manchester is located at the heart of the UK's largest nuclear industry, home to significant nuclear orientated businesses, including the world-leading University of Manchester Dalton Nuclear

Institute. It is a hub of civil nuclear technology and engineering expertise - newbuild, decommissioning/ life extension, advanced materials & robotics.

Power Distribution: Manchester is a transmission & distribution and Smart Grid industry cluster which includes Siemens Transmission & Distribution; RXPE Power Engineering and WSP Parsons Brinckerhoff.

Consultant Engineering: Home to a large cluster of world-leading engineering practices such as Jacobs Engineering and Bouygues Energies & Services, providing a range of engineering, technical consultancy, and architectural services to UK and global projects.

Smart Grids: Internationally recognised as a leader in local generation, battery storage, energy engineering for renewables, power distribution, A.I, aggregation platforms, Demand Side Response, Big Data, Cyber Security, IoT.

New Battery Technologies: Research & commercialisation strengths in new battery technology & materials along with supercapacitor R&D strengths. The National Graphene Institute and the application-focused Graphene Engineering Innovation Centre (GEIC) are home to experienced innovation experts who are working on areas such as how best to incorporate graphene into batteries and super-capacitors.

Sustainability: In tandem with innovation in energy solutions, GM is a leading location for sustainable initiatives including: Sustainable Packaging, Lightweight Materials for Transport & Sustainable construction

Fuel Cells / Hydrogen: GM is at the heart of the North West Hydrogen Cluster which includes assets such as the Manchester Fuel Cell Innovation Centre.

Financial and Legal Services: Specialist low carbon financial and legal services are provided by the UK's largest regional Financial and Professional Services hub.

Hydrogen Generation

Hydrogen has attracted a lot of attention in recent years as one of the most important tools available to limit the effects of climate change. There are currently 360 largescale hydrogen generation projects across the globe worth \$500 bn. In the UK, the first ever Hydrogen Strategy was produced in August 2021



building on the UK Government's Green Industrial Revolution released in 2020.

The Strategy sets an ambitious target for the UK to establish a 5GW capacity of low carbon hydrogen by 2030. A detailed Hydrogen Business model was published alongside the Strategy outlining the main barriers preventing the deployment of low carbon hydrogen projects, the main one being the cost gap between low carbon hydrogen and higher carbon fuels.

The Hydrogen Strategy describes the creation of a thriving new hydrogen industry, which could support over 9,000 jobs and £900 million of GVA by 2030. The strategy forecasts that, under a high hydrogen scenario, up to 100,000 jobs and £13 billion of GVA could be generated from the UK hydrogen economy by 2050.

The strategy suggests Government will build on UK's successful hydrogen research and innovation to date to reduce costs, address risks and provide safety and technical assurance of the technology. As the hydrogen economy expands and demand grows, researchers, innovators, investors and producers will respond with new technological advances that could deliver further production cost reductions or greater emissions savings.

In the North West, Net Zero North West, a newly formed industry-led cluster is acting as a public and private sector investment accelerator for industrial decarbonisation and clean growth projects in the North West. There is political representation from all North West LEPs and Combined Authorities and its ambition is to become the UK's first low carbon industrial cluster by 2030 and world's first net zero industrial cluster by 2040.

Projects resulting from the Net Zero North West cluster will not only supercharge the region's green recovery by driving job creation, innovation, and investment in the North West but a vibrant, growing net zero economy itself will boost international trade and exports for all businesses.

Greater Manchester is set to receive a huge boost to its hydrogen capabilities with the development of the city's first hydrogen fuel hub, Trafford Green Hydrogen. Green Hydrogen produced from renewable electricity can be converted back into electricity using fuel cells or used in heating and power generation. The 200MW hydrogen fuelling hub is set to be the largest in the UK and a result of a partnership between the region's utility companies, Greater Manchester Combined Authority, Manchester Metropolitan and Trafford Council. The plant will provide businesses in the Greater Manchester region with easy access to hydrogen fuel. It will also support businesses that utilise hydrogen for transportation fleets or with heating requirements – both of which are low carbon.

4.3 – City-Region Diplomacy

City led international collaborations and partnerships have been taking place across the city-region since the 1950s when twinning links were common. More recently, international connections have been developed by regions and the GMCA through specific EU programs and memberships to international networks, via key delivery agencies as well as the Department for International Trade.

City – Region Diplomacy is a powerful enabler for facilitating global trade through strengthening links with other global cities and regions. By leveraging the City-Region's recognised strengths, soft power assets (inc. the Mayor and Councillors) and with the global network of diplomats, sector specialists and dedicated Northern Powerhouse resources through DIT, a number of successful trade events have taken place focussing on a single industry sector for a particular market.

Recent success stories as a result of the City-Region Diplomacy framework include the Big Booster, an international acceleration programme between GM and the Grand Lyon region in France, helping entrepreneurs increase their global trade. Also, the new partnership with the North Rhine Westphalia and the Ruhr Metropole regions in Germany facilitated two successful events on Cybersecurity and Low Carbon Energy in 2021. Finally, two exciting partnerships under the City-Region Diplomacy umbrella are those with Osaka in Japan and with Boston in the United States with programmes of trade co-operation due to take place in 2022.

4.4 – GM Strategic Partners

Growth Company

The Growth Company is a not-for-profit organisation head-officed in Manchester and covering a large region of the North of England. It aims to drive inward investment and international trade by playing a key role in developing business relationships and partnerships between British cities and regions in both developing and mature economies around the world.

Specifically for Greater Manchester, the Growth Company delivers the Department for International Trade's programmes with a network of International Trade Advisors (ITAs), sector specialists and a dedicated Export Manager resource. Successful programmes launched and delivered by the Growth Company include the Export Academy, Peer Networks, the Global Scale Up Programme and Innovate UK Edge. As the economic delivery arm of the Greater Manchester Combined Authority (GMCA), the Growth Company is supporting growth in Greater Manchester through raising the City-Region's profile, attracting investment and defining policy strategy through commissioning research in the region.

MIDAS, Manchester India Partnership, Manchester China Forum and Marketing Manchester are four of the most successful, focussed services of the Growth Company.

DIT North West

DIT North West supports GM companies with their global trade plans, not only inspiring and enabling new exporters to realise their export potential but also assisting established exporters to further grow their exports in existing and new overseas markets. The Growth Company is the strategic delivery partner for DIT across the Northern Powerhouse region.

The DIT North West Team comprises over 30 International Trade Advisors (ITAs) including sector specialists and dedicated resources for each Local Enterprise Partnership (LEP). A wide range of expertise within the team is available including sectors such as Chemicals, Financial Services, Food & Drink, Manufacturing, Professional Services and others.

The Department for International Trade has appointed an Export Manager for Greater Manchester as part of the Levelling Up Agenda to help SMEs in the region realise their export potential as part of Global

Britain. The role involves engaging with SMEs across Greater Manchester and promoting the opportunities presented to both existing and new exporters to maximise their international trade opportunities as part of Global Britain.

A new GM Trade Group with members from the Greater Manchester Combined Authority (GMCA), the Greater Manchester Chamber of Commerce, University of Manchester, the Department of International Trade (DIT) North West and other third sector and private companies (Export Champions) has been put in place in January 2021 to develop this new Export Plan for the GM City-Region and oversee its implementation.

Additionally, a new e-commerce and digital marketing service has been in place since 2020 to support GM businesses with their online activity as they recover from the COVID-19 pandemic and resume trading globally.

MIDAS

MIDAS helps hundreds of businesses successfully relocate to or expand in Greater Manchester. During 2020/22, MIDAS has adopted a strategy for growth that includes:

1. Placing more focus on global R&D/Innovation led projects: MIDAS will continue to refine and develop an evidence-based approach to market development and investor profiling/company targeting. This insight helps identify hotspots in key markets to align GM's strengths with in-market opportunities to support Innovation GM. A stronger FDI focus is placed on the attraction of projects such as R&D centres and HQ's; tech centres and greener, higher-value projects, supporting investments through a lens of digitalisation and decarbonisation.

2. Working with UK Government/DIT to:

- a. Build on Manchester's marketing position as a top 10 investment location: The UK needs a strong Manchester to achieve a true Global Britain and MIDAS will continue to invest in efforts to support this, with the help of government.

- b. Strengthen support offer: MIDAS backs calls to make the UK more competitive post-Brexit/pandemic on tax, subsidies and regional funds and will continue to push this. There is a real opportunity for greater co-investment/industry subsidy models,



so that the City-region continues to be successful in attracting FDI. Lobbying for significant recovery and support efforts are required to help Manchester return to pre-COVID-19 levels. There is also a strong need to invest in skills as well as wider capital and tax incentives.

- c. Attract major transformational projects such as Hydrogen Generation in the region.

3. Building investible propositions: Innovation GM will create a pipeline of investible propositions for capital and corporate investment for sovereign wealth funds that will be of interest to DIT's Capital Investment Team and the Office for Investment. MIDAS plans to build those in partnership with local partners and stakeholders, DIT and through their sector and market teams (Manchester China Forum/Manchester India Partnership).

Manchester India Partnership (MIP)

Launched in 2018 as part of MIDAS, the award-winning Manchester India Partnership (MIP) was established to unite private businesses, academia and the public sector across India and Greater Manchester to build and strengthen trade, investment, cultural, and educational ties.

Established as one of the UK's primary sources of foreign direct investment (FDI) and one of the world's fastest growing economies, India's ambitions complement the rich history and continual innovation of the UK's fastest growing city, Manchester.



Manchester China Forum (MCF)

Established in 2013, Manchester China Forum is the City-Region's special purpose vehicle for driving forward the Greater Manchester-China relationship. The Forum has been successful in ensuring Manchester is equipped for China's rapid growth and the opportunity that this presents for the City-Region. Forming part of MIDAS, it continues to drive forward the Greater Manchester-China agenda and ensure growth in commercial connectivity between the City-Region and China.

GM Chamber of Commerce

With over 4,500 members, the Greater Manchester Chamber of Commerce is the largest accredited Chamber in the UK, located in the city centre with a strong presence in Greater Manchester's ten local authority areas. It provides business support to companies of all sizes, from sole traders to large PLCs.

The Chamber provides information and advice to new and experienced exporters, importers or companies considering setting up overseas.

- Planning for Success services have been designed to help SMEs develop a robust international strategy whilst accessing information and expert advice on the complexities of trading. Ensuring a business has a solid compliance platform which meets domestic and international regulations is a key objective of this service.
- The Chamber also offers training courses ideal for upskilling an international trade team, including bespoke packages and the nationally recognised "Foundation Award" programme including training on Export Documentation, Incoterms 2020, Import Procedures and Documentation, Export Customs Procedures, Rules of Origin and Inward and Outward Processing Relief. Most of the courses can be wholly or partially funded by grants such as the SME Brexit Support Fund.
- Support to develop an effective International Strategy is also available through an award-winning in-house team working closely with a

Global Business Network of associates, approved suppliers and strategic partners.

- Advice and support with export and import documentation such as certificates of origin and customs declarations.
- Bitesize Session Programmes: Free one-hour sessions delivering technical knowledge in exporting and importing. From VAT, Rules of Origin, Incoterms, Export/Import Procedures, NI protocol and more, these sessions deliver the basics on these key areas of trading.
- Chamber Customs Webinars: Focus on the new trading rules for exports and imports including customs processes, rules of origin, transit and future relations of the EU-UK relations.

Federation of Small Businesses (FSB)

The Federation of Small Businesses began in 1974 with the aim of representing the views and concerns of small businesses. The organisation today is the UK's largest business organisation and lobbyist, with offices in Westminster, Blackpool, and in all the devolved nations. FSB today provides members with an exclusive package of value adding business services, including legal advice, insurance, tax protection, financial products and wider business support.

There were 6 million businesses in the UK at the start of 2020 with SMEs accounting for 99.9% of the business population. There were 5.94 million small businesses (with 0 to 49 employees), 99.3% of the total business. Compared with the previous year, the private sector business population increased 1.9% (+113,000 businesses). SMEs account for three fifths of the employment and around half of turnover in the UK private sector. Total employment in SMEs was 16.8 million (61% of the total).

Small businesses have the ability to respond quickly to new circumstances. In the current 'post' pandemic climate, business protocols are still being re-evaluated, the opportunity to find new solutions, new ways of working, and new customers mean small

businesses will need to do things differently to grow and thrive.

Traditionally, international trade is dismissed as 'too difficult' by small businesses and export has been seen as something an organisation develops over time, once the domestic market has been established. In today's world, with digital payment systems, high quality logistical connections and online conferencing, the transition to 'exporter' can happen a lot quicker than was previously the case and untapped markets can be reached by most small business owners.

The FSB membership includes general business support, as well as easy access to organisations that can help and assist around exporting. Help is also available from other members and from central FSB resources. Extensive support in legal issues, taxation and cyber-crime, and a network of experienced business owners on hand to share experiences and to offer useful tips and insights.

NPH Overseas Champions

DIT manages the Northern Powerhouse (NPH) Overseas Officers programme as part of the wider Levelling-Up agenda.

The 14 officers are based in DIT teams overseas, covering 8 markets (USA, Germany, Estonia, China, Brazil, South Africa, Indonesia and India) across a diverse range of industry sectors such as Clean Growth, Tech/Creative, LifeSciences and AgriTech.

They are an extension of the Regional NPH Trade and Investment delivery team, identifying opportunities in their markets and working with UK based colleagues to help increase exports and land investment projects, a key objective of the programme.

NPH Foreign Trade Missions

Events are one of the most effective ways to support companies looking for trade opportunities. The DIT regularly maintains a comprehensive calendar with both UK and overseas events as well as overseas missions.

Northern Powerhouse companies have the opportunity to join select trade missions tailored to Northern Powerhouse sector strengths. Forthcoming trade missions and events are published online (All Events (great.gov.uk))

A blend of virtual, in-person and hybrid type of events is available to ensure safety and compliance with travel restrictions whilst the COVID pandemic is still active in certain parts of the world.

The postponed EXPO2020 Dubai-UAE exhibition is now taking place between October 1st 2021 and March 31st 2022, offering a unique business opportunity for international trade with organisations from 191 nations taking part and promoting innovation, sustainability, mobility and global trade opportunities.

4.5 – GM Export Programmes

The Export Academy

The Export Academy, an integral part of the Department for International Trade (DIT) updated Export Strategy, gives small and micro-businesses the know-how to sell to customers around the world with confidence.AA

It's applicable to a wide range of businesses both in the Goods or Services sectors. The programme can help business owners and entrepreneurs overcome many of the common challenges they face when they are planning to export. It is made up of a series of ten core interactive educational sessions with exclusive content based on feedback from previous delegates and designed specifically to help businesses understand everything they need to know in order to sell internationally.

"A fantastic initiative. We were honoured to be part of the inaugural Export Academy Programme, which was extremely well conceived, planned, and executed."



*Elizabeth Vega OBE, CEO,
Informed Solutions – Export
Champion*

In the North West, the Export Academy programme includes workshop sessions and practical advice on international market research, pricing strategy and route to market, customs and export controls, international commercial (INCO) terms, customs, VAT, rules of origin and financial regulations. The programme also supports new exporters with creating an effective export action plan.AA

Global Scale Up Programme (GSU)

The Global Scale-up Programme enables companies to rapidly expand into multiple global markets. The programme is delivered through the Growth Company in partnership with the Department for International Trade and is funded by the Local Growth Fund.

*71 new market entries,
£25m of funds raised
for client support and
£51m increased turnover
across the board.*

The programme provides unrivalled access to international trade and business growth experts, including in-market support in targeted overseas markets. The programme runs three times a year, onboarding up to 30 local businesses providing a peer-to-peer network of fast-growing businesses to collaborate, knowledge share and network with. GSU's corporate partners are also available to support with participants' international expansion plans, making introductions, providing advice and delivering workshops and seminars. The GSU corporate partners are KPMG, DWF, Manchester Airport Group and Santander.

Global Scale-up will be delivering its 4th cohort in Q3 of 2021. To date, GSU has supported over 70 programmes and achieved 71 new markets entries, created 69 jobs, supported clients with £25m funds raised and a £51m turnover increase across the board.

The GSU ecosystem has growing substantially over the past 2-3 years, with an extensive overseas

network of economic development, inward investment and private sector partners in place supporting our clients on their international scale up journeys.

Recent activity includes a close co-operation with London & Partners, working on an international mission to New York, with joint activity scheduled in Florida in Q3 2021. Other international activity includes upcoming virtual seminars in Melbourne and a hybrid international visit to The Next Web conference in Amsterdam.

Peer Networks (Export)

The Peer Networks programme is a national programme funded by the Department for Business, Energy & Industrial Strategy (BEIS). In the Greater Manchester region it is delivered by the Business Growth Hub, part of the Growth Company.

Aimed at SME owners and directors, Peer Networks brings together small groups of people to address shared challenges, devise solutions and maximise their combined expertise and experience.

The course is fully funded for companies that meet the enrolment criteria and includes interactive action learning, trained facilitators, small groups, flexible topic selection and 1-2-1 business support and coaching, provided by business advisers who have interest and lateral knowledge to challenge and recommend from external practice.

A course for a specific cohort of Exporters in the Greater Manchester region was added to the programme portfolio in 2021.

Innovate UK Edge

Innovate UK Edge is a key part of the UK Innovation Agency's investment in the pioneering businesses that drive economic growth. It is a publicly-funded service available to all high potential small to medium sized innovation-driven companies, including Innovate UK grant winners.

In Greater Manchester, the programme is delivered through the Growth Company and supports those GM innovators building scalable businesses to achieve their goals, in every sector and from seed to scale stage.

An experienced team of innovation and growth specialists offers a bespoke strategy to each client,

working closely with leadership teams to create the conditions for each business to succeed and bring the benefits of their innovation to national and international audiences.

The programme's common priorities include:

- Exploiting business innovation: Developing a commercial strategy and building a team to deliver it; protecting & harnessing IP; improving innovation management & accessing the innovation ecosystem globally
- Sourcing funding and finance: Applying the right strategy to secure grants and capital for each business, enhancing investor appeal and getting investment ready to propel growth
- Opening new markets: Creating connections to partners & leveraging insights to expand into vertical & international markets and achieve scale

Often these priorities are closely linked, especially in the case of scaling businesses which must align all business functions to achieve a step change in growth.

"We are glad we applied for the ESIF grant to help us with our Export Action Plan, visiting Japan and Germany on business development missions and translating our marketing brochures in 4 additional languages"



Aaron Thomas, Co-Founder and Director, Trilar Ltd



ESIF Internationalisation Fund

The Department for International Trade (DIT) launched its Internationalisation Fund for eligible business in England in 2020. The purpose of the fund is to assist up to 7,600 SMEs nationally to improve international trade performance through co-investment in approved activity. The Fund is supported by the European Regional Development Fund (ERDF) and is running from December 2020 to early 2023.

SMEs in England with the following characteristics are eligible to apply for funding:

- International High Growth Potential with prospects of employment growth or productivity improvement.
- A product or service suitable for international trade, or which could be developed for international trade and see international trade as a path for growth.
- £500k+ sales/turnover (companies with lower sales/turnover may also be eligible).

Available funding:

- Co-investment funding between £1k and £9k - total amount of funding available varies amongst LEP areas.
- Support tools are available to establish the amount of funding SMEs can apply for.
- The Fund Administrator will regularly update funding availability for each LEP area, this supports management of expectations for SMEs and reduces the chance of over-committing funding.

Eligible ESIF expenditure includes advice from third party private sector experts to help SMEs prepare for international trade, which can be used for: market research, market selection and entry advice,

advice on Intellectual Property Rights, cross cultural negotiation support and standards, translation and cultural advice, international trade legal advice, PR support, international social media and search engine optimisation, international marketing, routes to market/agency advice, overseas business environment, and due diligence. SME participation in Trade Fairs, Trade Missions and independent market development visits may also be eligible.

Export Champions

The Export Champions initiative started in the North West in 2013 and there are currently over 400 Export Champions nationwide. These are companies dedicated to growing their export business and they have also made a commitment to help others do the same, increasing prosperity by seizing the opportunities offered by trading in a global market.

Since the programme launched, a large number of companies have benefited from the insight, knowledge and experience in international trade that Export Champions across the Greater Manchester region share at events and meetings. Export Champions give up their time voluntarily to inform and inspire new exporters as well as engaging with existing exporters making them aware of new opportunities in global trade, such as those presented with the new Free Trade Agreements the UK government has signed in 2021.

Export Champions benefit themselves from being part of this growing programme. Not only are they presented with the chance of networking with like-minded exporters but also they have the opportunity to feed directly into DIT policy and take part in trade missions around the world.

“I enjoy being an Export Champion and sharing my 30 years’ experience with other GM Businesses. Exporting isn’t really that scary and is much easier than most people think. Exporting is just selling, so do your research and give it a go...”



Tony Goodman MBE, Forest & Co



5 – Recommendations

UK businesses are looking for greater support to move through the ongoing coronavirus pandemic. They recognise that international trade offers many opportunities, which they can capitalise on for recovery and growth. It is clearly evident that the UK as an independent trading nation needs to explore all new opportunities available in international trade in order to increase prosperity and create more and better paid jobs. And Greater Manchester as a city-region is no different; international trade can be a true success story as long as the City-Region plays to its strengths and implements its growth strategy with digitalisation and decarbonisation at the centre of the region's post-COVID recovery.

In addition to the Free Trade Agreements signed in the past 12 months, international partnership development is essential in the uncertain economic climate businesses and policy makers find themselves in. This would help GM exporters better identify and connect with local agents and partners, which would not only help remediate current travel restrictions

on UK exporters, but also provide a short-to-mid-term bridge to help develop successful trading partnerships.

Aspiring exporters need more encouragement to take advantage of all the support and resources available from the DIT, the GM LEP and strategic partners such as the Growth Company, the GM Chamber of Commerce and the FSB in order to ensure they bridge the gap between uncertainty and opportunity when they embrace new, international routes to market.

Successful programmes such as Export Champions, the Global Scale Up and Peer-to-Peer should be expanded further and an online portal with information on all things International Trade with links to all available government, public and private sector information would boost the confidence of new exporters to overcome the perception that International Trade is difficult in the current circumstances.

Building back better and building back greener using innovation, technology and the region's engrained ingenuity will help local authorities to "level up" a business environment where SMEs across all 10 GM boroughs are offered the same opportunities and support to overcome challenges, barriers and insecurity, and be able to trade globally and prosper.

The Export Plan's objectives are completely aligned with the those outlined in the GM International Strategy including the closer co-operation between UK and local government and with strategic partners to identify sector and market opportunities particularly in new, growing markets.

An implementation phase of the export plan has been agreed in order to maintain in the short-term and grow in the med/long-term the £15bn of Export value in the City-Region.



Proposed Actions:

Raise the profile of Greater Manchester's export capability by utilising our Export Champions, communicate sector specific case studies, raise awareness through social media, PR, advertising and other marketing channels.



Promote the Greater Manchester Export Plan amongst businesses across all 10 boroughs and encourage exporters to take advantage of all available DIT and Strategic Partners' resources at their disposal.



Showcase the opportunities for Greater Manchester exports at an international level based on the 2021 UK Export Strategy and the new Free Trade Agreements.



Develop and implement a City-Region Diplomacy Plan which identifies a number of strategic city relations and cluster partnerships that align with Greater Manchester's sector opportunities and priority markets.



Explore the scope for a "GM Digital Portal" to bring all available resources under one roof and direct users to relevant landing pages on DIT's or partners' websites.



Organise trade events and overseas missions working in partnership with the other 10 Northern Powerhouse Regions.



Encourage new exporters to register and complete the Export Academy programme.



Maintain the activity of the GM Trade Group as an ideas board where challenges and opportunities for trade in the region are debated and ideas for new export programmes and strategies are discussed and evaluated.



Ensure an even closer collaboration between DIT, the Northern Powerhouse, Local Enterprise Partnership and all strategic partners in the region as key stakeholders to enable sustainable export growth.

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8 – Appendices

GM Goods Exports (Sectors)

Year	Food and Live Animals	Beverages and Tobacco	Crude materials, inedible, except fuels	Mineral fuels, lubricants and related materials	Animal and vegetable oils, fats and waxes	Chemicals and related products	Manufactured goods	Machinery and transport equipment	Miscellaneous manufactured articles	Commodities and transactions	Grand Total
2016	440	138	246	224	20	1214	885	1648	1495	62	6372
2017	481	47	325	232	21	1306	936	1739	1483	89	6659
2018	485	21	298	116	21	1323	929	1838	1588	133	6752
2019	519	19	202	91	30	1292	894	1842	1518	172	6579

GM Services Exports (Sectors)

Year	Non-manufacturing	Manufacturing	Transportation and storage	Accommodation and food service activities	Information and communication	Financial and insurance activities	Real estate, professional, scientific and technical activities	Administrative and support service activities	Other service industries	Wholesale and motor trades	Retail (excluding motor trades)	All Industries
2017	23	324	1155	420	546	2541	927	944	1175	87	106	8247
2018	114	288	1384	417	543	2895	901	818	858	95	51	8363

GM Export Markets (Goods - 2019)

Partner Country	Export Value (£ million)	Business Count
Germany	805	1245
Irish Republic	680	1403
USA	641	2098
France	466	1202
Netherlands	308	1166
Italy	263	1003
Belgium	260	955
China	253	942
Spain	234	1120
Poland	161	914

No of GM Exporters (Goods)

Year	Number of exporters
2016	9894
2017	9941
2018	10175
2019	10673

GM Export Markets Non-EU (Goods - 2019)

Partner Country	Export Value (£ million)	Business Count
USA	641	2,098
China	253	942
Australia	140	1,032
UAE	123	1,137
Other Asia and Oceania	111	449
Turkey	106	654
Canada	96	861
India	90	796
Saudi Arabia	73	547
Hong Kong	63	858



Greater Manchester
Local Enterprise Partnership



The
Growth
Company



Department for
International Trade

