

An aerial view of the Greater Manchester cityscape at dusk. The sky is a soft orange and yellow. In the center, a large, stylized letter 'M' is formed by multiple vertical lines of various colors (red, orange, yellow, green, blue, purple). The city below is a dense collection of buildings, including modern glass-fronted structures and older brick buildings with gabled roofs. A prominent clock tower with a spire is visible on the right side. The overall scene is a vibrant and modern representation of the city.

# Welcome to Greater Manchester

An aerial photograph of Manchester, UK, during the golden hour of sunset. The city's dense urban landscape is visible, featuring a mix of modern glass-fronted buildings and traditional brick structures. The prominent spire of the Manchester Town Hall is a central focal point. The sky is a warm, hazy orange, and the overall scene is bathed in soft, low-angle light.

# Welcome and Introductions

Mike Blackburn, OBE, Chairman of the LEP

An aerial view of the Manchester city skyline at sunset. The sky is a warm, golden-orange color. In the foreground, there are several buildings with dark roofs and some with skylights. In the middle ground, there are more buildings, including a prominent one with a large, arched window. In the background, the city extends to the horizon, with a tall, dark spire of a church or cathedral standing out against the sky. The overall scene is a dense urban landscape.

# Greater Manchester Overview

Lisa Dale-Clough, Head of Industrial  
Strategy, GMCA

An aerial photograph of Manchester, UK, at dusk. The city is illuminated by streetlights and building lights. The Greater Manchester Combined Authority (GMCA) building, a large circular structure with a glass facade, is the central focus. A white arrow points from the main title down to the building. Other prominent buildings, including the Spinnaker Tower, are visible in the background.

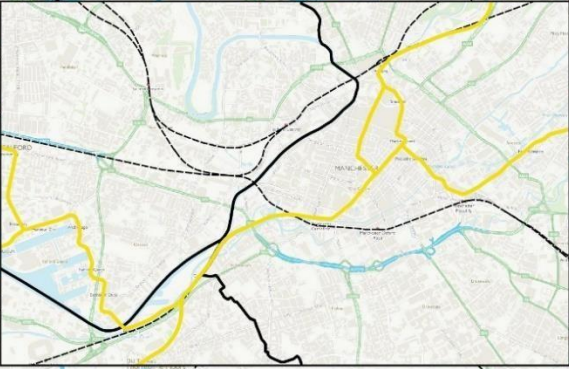
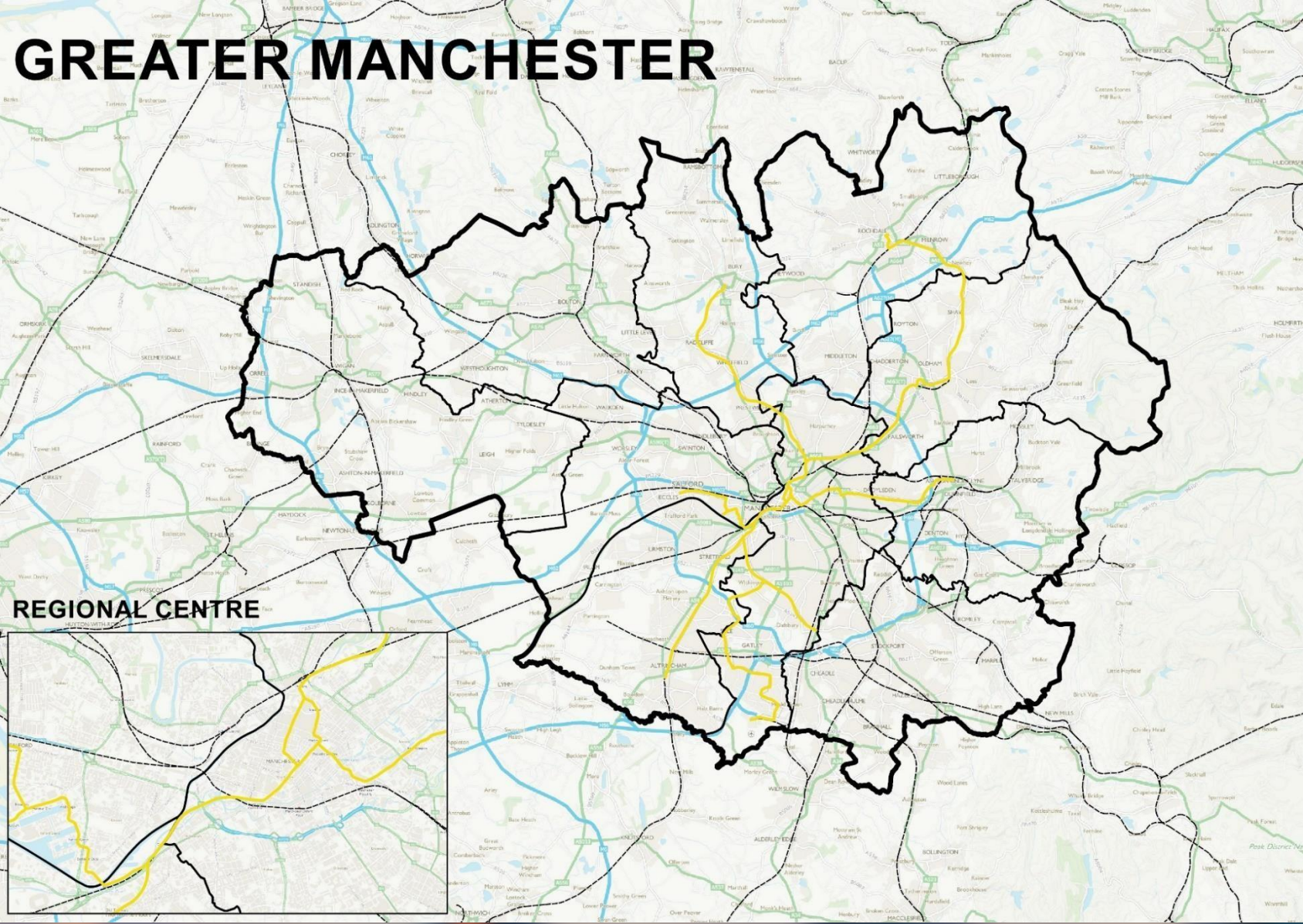
# Welcome to Greater Manchester

**GMCA**

**Greater Manchester Combined Authority**

# GREATER MANCHESTER

## REGIONAL CENTRE



**MADE IN RADICAL GREATER MANCHESTER**

**A place of Pioneering Thinkers**

**Social Justice Movements**



# GREATER MANCHESTER INTERNATIONAL METROPOLITAN CITY

Our long-term  
vision is to become  
a top 20 global city  
by 2035



# THE GREATER MANCHESTER ECONOMY



2.8m people  
+240,000 since 2000



1.3m working in GM  
+100,000 over next 10 years



123,700 businesses



Over 100,000 Higher Education Students  
at 4 HE Institutions

## Gross Value Added

GREATER MANCHESTER  
ECONOMY

£66bn

BIGGER THAN

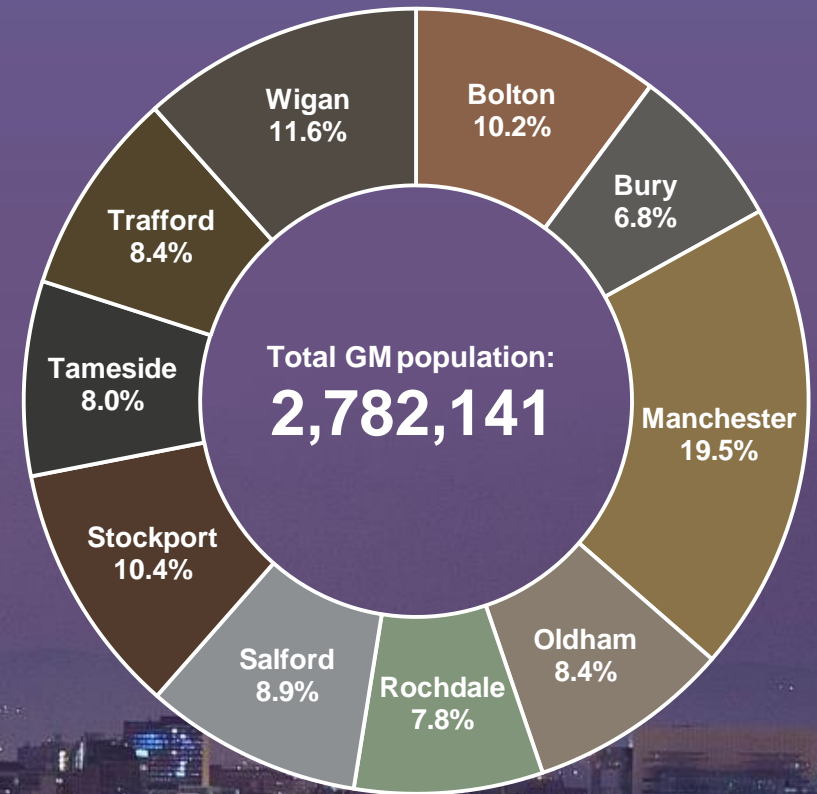
WALES  
ECONOMY

£62bn

NORTHERN  
IRELAND ECONOMY

£40bn

# MUNICIPALITIES



**Delivery Agencies working across GM**

**TfGM, MIDAS, Marketing Manchester, MGC, H&SC Partnership**

## ORIGINS OF DEVOLUTION

UK is the most centralised country in Western Europe.

MIER (Manchester Independent Economic Review) confirms the economic case for devolution in 2009.

The Localism Act allows for the creation of combined authorities (CA), pooling resources and working across a region.

In 2011, the GMCA is created – the first Combined Authority.

# TIMELINE



Greater Manchester Council abolished

1986

Association of Greater Manchester Authorities and GMPTA/E established



Greater Manchester Passenger Transport Authority



AGMA ASSOCIATION OF GREATER MANCHESTER AUTHORITIES

1994

City Pride Partnership created

1995



Marketing Manchester established

1996

MIDAS established



MIDAS

MANCHESTER INVESTMENT DEVELOPMENT AGENCY SERVICE  
www.investinmanchester.com

1997



Northwest REGIONAL DEVELOPMENT AGENCY

RDAs established

1998

Manchester Enterprises established



1999

Transport referendum held (congestion charging)

2008

New Economy established

new economy

# TIMELINE



# What is the Greater Manchester Combined Authority?

- Legal body to facilitate co-operation between Greater Manchester councils and partners
- Focus on large-scale strategic projects that are of importance to the whole region, like transport, regeneration and skills
- Each of the ten GM councils has one seat on the GMCA, held by the council leader
- Mayor joined GMCA as its chair and eleventh member
- Council leaders form 'Mayor's Cabinet' and hold GM portfolios/

# Greater Manchester Portfolios

**Manchester**



**Trafford**



**Tameside**



**Rochdale**



**Bolton**



**Stockport**



**Wigan**



**Salford**



**Oldham**



**Bury**



**Mayor of Greater Manchester**



## Additional Mayoral 'soft powers'

### Soft powers of the Mayor are arguably the most important:

- Influencing, negotiating powers
- 'Ear' of government and key contacts
- Relationships with stakeholders
- Public persona – media interest, both local and national profile
- Network of City Mayors (national and international) - joint lobbying, strength of voice and influence

# GOVERNANCE AND FUNCTIONS

## Combined Authority

- Legal body to facilitate co-operation between GM councils and partners.
- Mayor (chair) and 10 council leaders.
- Council leaders form 'Mayor's Cabinet' and hold GM portfolios.

## Local Enterprise Partnership

- Puts voice of business at the heart of decision-making.
- Oversees local industrial strategy implementation.
- 9 private sector members, Mayor, & 3 council leaders.

## Health and Care Partnership

- Oversees devolved health and care system.
- Mayor, 10 council leaders, emergency services, NHS, GPs, health commissioners and providers, Healthwatch & voluntary sector.

ENABLED BY GMCA FUNCTIONS

## Policing



Created by Gareth Starks from Noun Project

## Transport



Created by Boston from Noun Project

## Fire & rescue



Created by Lloyd Humphreys from Noun Project

## Economy & housing



Created by Sherriford from Noun Project

## Health



Created by Eozemad.com from Noun Project

## Waste disposal



Created by Chris Herman from Noun Project

## Convening power



**GREATER MANCHESTER**  
**DOING THINGS DIFFERENTLY**

# Mayoral Combined Authorities



**Greater Manchester**

**Tees Valley**

**Sheffield City Region**

**Liverpool City Region**

**Cambridgeshire & Peterborough**

**West Midlands**

**West of England**

# Mayoral Combined Authorities

## Greater Manchester has:

- Largest number of constituent authorities
- Greatest powers

	Greater Manchester	Cambridgeshire & Peterborough	Liverpool City Region	Sheffield City Region	Tees Valley	West Midlands	West of England
Local Authorities	10	7	5	4	5	7	3

# GREATER MANCHESTER STRATEGY

**our  
people  
our  
place**

The Greater Manchester Strategy  
Executive Summary

**Let's make**

**Greater Manchester**

**one of the best**

**places in the world**

-   
1 Children starting school ready to learn
-   
2 Young people equipped for life
-   
3 Good jobs for people to progress and develop
-   
4 A thriving economy in Greater Manchester
-   
5 World-class connectivity
-   
6 Safe, decent and affordable housing
-   
7 A green city for all
-   
8 Safe and strong communities
-   
9 Healthy lives and quality care
-   
10 An age-friendly Greater Manchester

# THE FUTURE OF GREATER MANCHESTER

HM Government

**Greater Manchester Local Industrial Strategy**

June 2019

**INDUSTRIAL STRATEGY**

**GREATER MANCHESTER**  
DOING THINGS DIFFERENTLY

**NORTHERN POWERHOUSE**

The cover features a night-time photograph of a modern building with a prominent red and blue illuminated structure, possibly a bridge or a public art installation.

Transport for Greater Manchester

GMCA

**GREATER MANCHESTER TRANSPORT STRATEGY 2040**

Draft Delivery Plan 2020-2025: Executive Summary

**GREATER MANCHESTER**  
DOING THINGS DIFFERENTLY

The cover features a stylized illustration of a city street scene with a blue bus, a person on a bicycle, a pedestrian, and a red car.

JANUARY 2019

**GREATER MANCHESTER'S PLAN FOR HOMES, JOBS AND THE ENVIRONMENT**

GREATER MANCHESTER SPATIAL FRAMEWORK  
REVISED DRAFT - JANUARY 2019

**GREATER MANCHESTER**  
DOING THINGS DIFFERENTLY

The cover is a solid dark blue with white text.

**TO BE RELAUNCHED IN 2020**

**The Greater Manchester Internationalisation Strategy**

2017 — 2020

GMCA

the Manchester Growth Company

Greater Manchester Local Enterprise Partnership

The cover features a photograph of a bridge over a river, with a person walking on the bridge.

**GREATER MANCHESTER**  
DOING THINGS DIFFERENTLY

**5-YEAR ENVIRONMENT PLAN FOR GREATER MANCHESTER**

2019-2024

The cover features a photograph of a cityscape at dusk, with a green field in the foreground.

**GREATER MANCHESTER**  
DOING HOUSING DIFFERENTLY

**GREATER MANCHESTER HOUSING STRATEGY**

2019 - 2024

The cover features a photograph of a modern brick house with solar panels on the roof.

Greater Manchester

**Clean Air Plan**

Outline Business Case

Clean Air Greater Manchester

Care about clean air

#cleanairgm

The cover is white with blue and teal accents.

Greater Manchester

**Infrastructure Framework 2040**

Energy, Transport, Water, Floods, Green+Blue, Digital

**GREATER MANCHESTER**  
DOING THINGS DIFFERENTLY

GMCA

The cover features a map of Greater Manchester with various infrastructure projects highlighted in different colors.

**FIND OUT MORE**



<http://www.greatermanchester-ca.gov.uk>

  
**@greatermcr**

  
**/greatermcr**

An aerial photograph of Manchester, UK, during the golden hour of sunset. The city's dense urban landscape is visible, featuring a mix of historic stone buildings and modern glass-fronted structures. The prominent spire of the Manchester Town Hall is a central focal point. The sky is a warm, hazy orange, and the overall scene is bathed in soft, low-angle light.

# Greater Manchester's Priorities Looking Forward: Local Industrial Strategy

Mike Blackburn, OBE, Chairman of the LEP

A nighttime photograph of a modern cityscape in Manchester. The scene is dominated by several tall, illuminated buildings. On the left, a prominent white cable-stayed bridge with a tall pylon spans across a canal. The buildings are lit up with various colors, including purple, blue, and yellow. One building on the right has a large 'BBC' sign on its roof. The canal in the foreground reflects the lights from the buildings and the bridge. The overall atmosphere is vibrant and urban.

# The Greater Manchester Local Industrial Strategy

# INDUSTRIAL STRATEGY: BACKGROUND

The **Industrial Strategy White Paper** (November 2017) sets out an ambition to create an economy that boosts productivity and earning power throughout the UK around the “**Five foundations of productivity**”.



It also sets out **four Grand Challenges** where innovation and investment will position the UK at the forefront of the industries of the future

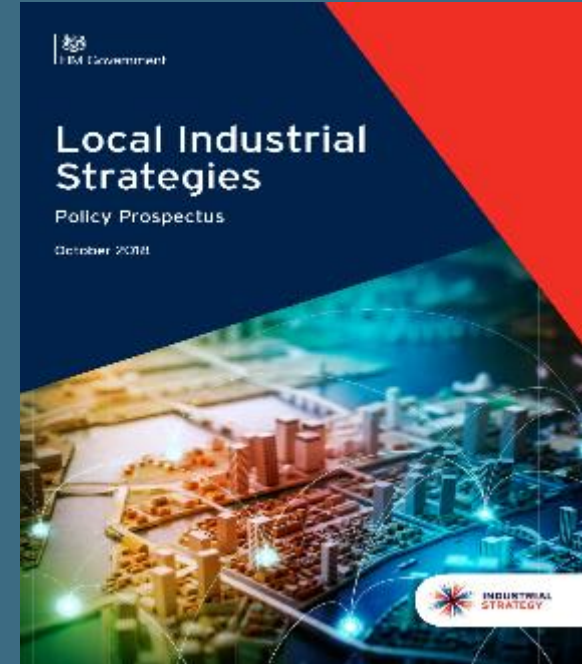


# INDUSTRIAL STRATEGY: BACKGROUND

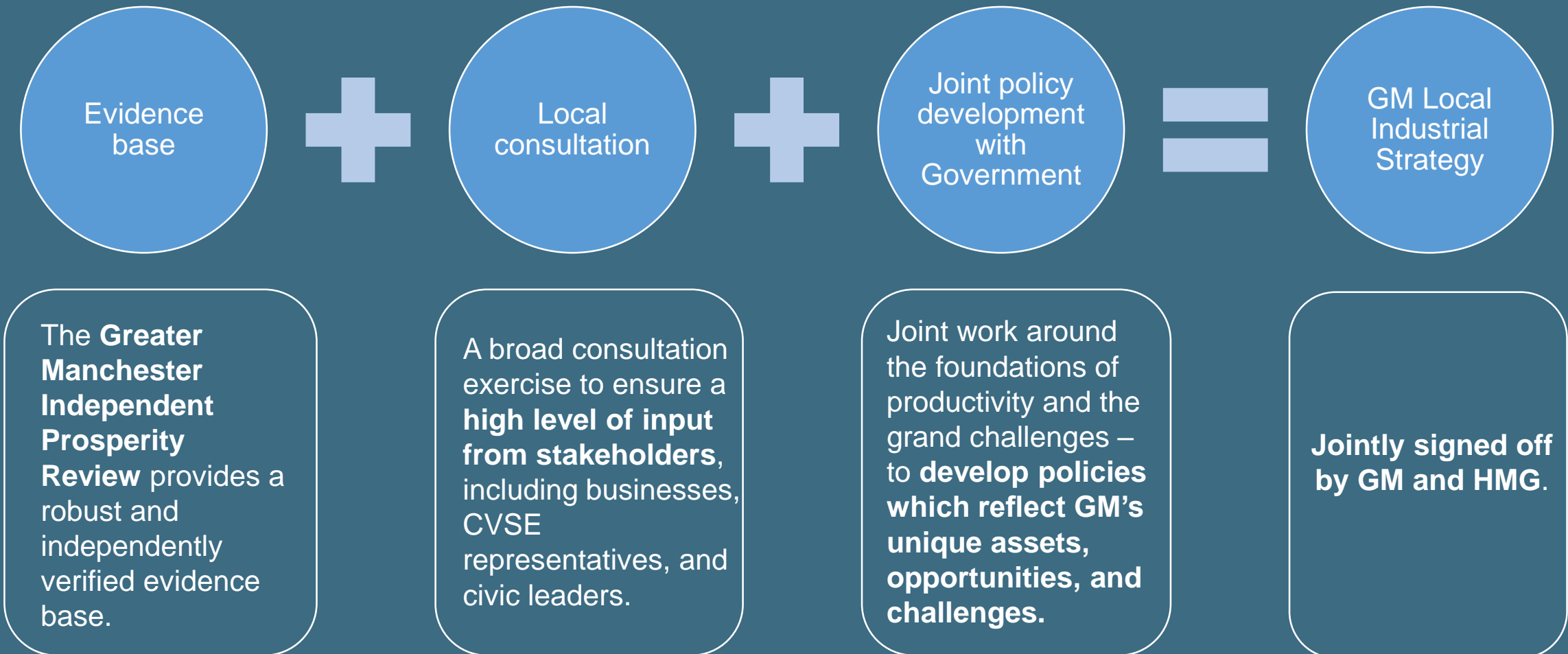
UK Government has been working in partnership with local areas to develop long-term, evidence-based strategies to increase productivity and realise potential of local economies.

Local Industrial Strategies should:







- Set out **clearly defined priorities** for how cities, towns and rural areas will maximise their contribution to UK productivity.
- Allow places to make the most of their **distinctive** strengths.
- Better **coordinate economic policy at the local level** and ensure greater collaboration across boundaries.
- Inform **local choices**, prioritise **local action** and, where appropriate, help to inform **decisions at the national level**.
- Help local areas in England decide how to use the new **UK Shared Prosperity Fund** (will replace EU Structural Funds used to boost local economic growth).



# INDUSTRIAL STRATEGY: APPROACH



# GREATER MANCHESTER INDEPENDENT PROSPERITY REVIEW

<p><b>Diane Coyle (Chair)</b> Bennett Professor of Public Policy, University of Cambridge</p> 	<p><b>Professor Ed Glaeser</b> Professor of Economics at Harvard University</p> 
<p><b>Stephanie Flanders</b> Head of Bloomberg Economics</p> 	<p><b>Professor Henry Overman</b> Professor of Economic Geography at the London School of Economics</p> 
<p><b>Professor Mariana Mazzucato</b> Professor in the Economics of Innovation at University College London</p> 	<p><b>Darra Singh</b> Government &amp; Public Sector Lead at Ernst &amp; Young</p> 

Intensive nine-month process to update Greater Manchester's economic evidence-base.

The Review Panel was responsible for:

- assessing progress against the Manchester Independent Economic Review
- Reviewing Greater Manchester's evidence base and current policy response
- commissioning new, path-breaking research into priority areas
- making recommendations for the Greater Manchester Local Industrial Strategy

# KEY FINDINGS

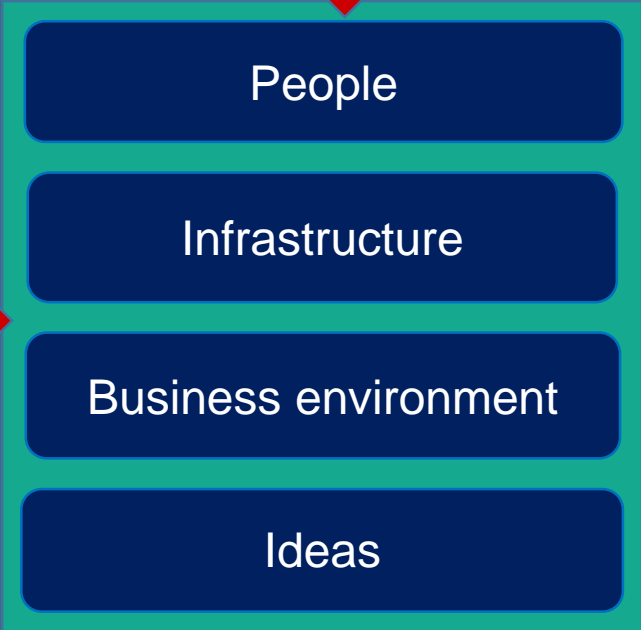
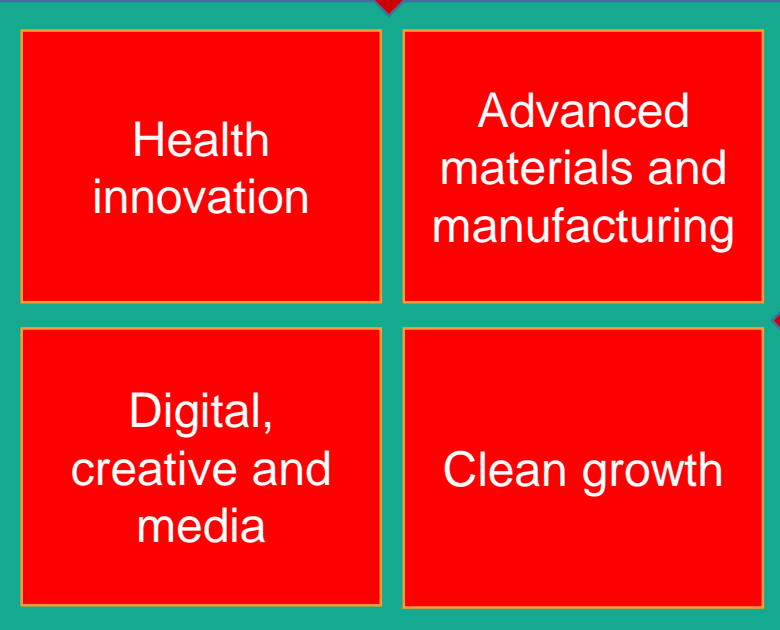
<p><b>GREATER MANCHESTER IS THE MOST ECONOMICALLY DIVERSE CITY IN THE UK</b></p>	<p><b>GREATER MANCHESTER HAS WORLD-CLASS STRENGTHS IN ADVANCED MATERIALS AND HEALTH INNOVATION</b></p>	<p><b>GREATER MANCHESTER IS THE BEST PERFORMING CITY-REGION OUTSIDE LONDON FOR BUSINESS BIRTHS</b></p>
<p><b>FOR TWO DECADES, GREATER MANCHESTER'S PRODUCTIVITY HAS CONSISTENTLY REMAINED AT 90% OF UK LEVEL</b></p>	<p><b>QUALIFICATION LEVELS ARE IMPROVING BUT 1 IN 10 IN GREATER MANCHESTER STILL HAVE NO QUALIFICATIONS</b></p>	<p><b>EDUCATION AND SKILLS, ALONGSIDE HEALTH ARE AMONG THE MOST POWERFUL EXPLANATIONS OF LOWER PRODUCTIVITY IN GM. POOR UTILISATION OF SKILLS ALSO CONTRIBUTES</b></p>

# KEY FINDINGS

<p>THE EMPLOYMENT RATE OF GM ADULTS WITH LONG-TERM HEALTH ISSUES IS 13% POINTS LESS THAN FOR THE GM POPULATION AS A WHOLE</p>	<p>TRANSPORT DEVOLUTION HAS ENABLED BETTER GOVERNANCE AND IMPROVEMENTS TO TRANSPORT NETWORK E.G. METROLINK EXTENSION</p>	<p>THERE IS A NEED TO FOCUS ON PRODUCTIVITY IN BOTH FRONTIER SECTORS AND THE 'FOUNDATIONAL' ECONOMY – BOTH HAVE OPPORTUNITIES AND CHALLENGES</p>
<p>DISRUPTIVE TRENDS IN TECHNOLOGY, ROBOTICS, AI AND THE SHIFT TO CLEANER GROWTH REQUIRE ADAPTION IN THE SKILLS SYSTEM</p>	<p>GM'S INFRASTRUCTURE CAPACITY HAS IMPROVED BUT NEEDS TO INCREASE IF IT IS NOT TO PLACE CONSTRAINTS ON PRODUCTIVITY</p>	<p>GREATER MANCHESTER'S 2038 CARBON NEUTRAL AMBITIONS CAN ALSO BE USED TO CREATE BENEFITS FOR RESIDENTS AND MAXIMISE QUALITY OF LIFE</p>

# LOCAL INDUSTRIAL STRATEGY: TWO PRONGED APPROACH

Place: prosperous cities, towns and communities across Greater Manchester through a twin-track approach



Capitalising on GM's **strengths and strategic opportunities** to grow high value, well-paid, productive jobs and build leading industries and markets through innovation, investment and sector development.

Reforming public services and driving investment and transformation to **improve productivity and create an economy that benefits all people and places.**

# STRENGTHS AND OPPORTUNITIES IN FOCUS

**Health innovation:** Global leadership on health and care innovation, improving population health and extending healthy lives

**Advanced materials and manufacturing:** A world leading region for innovative firms to experiment with, develop and adopt advanced materials in manufacturing, within a 'Made Smarter' Ecosystem

**Digital, creative and media:** A leading European digital city-region, with internationally-significant broadcasting, media and cyber-security clusters

**Clean growth:** A mission to deliver carbon neutral living within the city-region's economy by 2038

# STRENGTHENING THE FOUNDATION OF PRODUCTIVITY

**People:** Creating an integrated all-age skills and work system that ensures everyone reaches their potential and employers have the skills to deliver our industrial strategy

**Ideas:** driving prosperity and leading industrial, social and environmental transformation through innovation, partnerships and investment

**Infrastructure:** Putting in place the integrated 21st century infrastructure needed for digitally-driven, clean and inclusive growth

**Business Environment:** Transforming businesses productivity by strengthening leadership and management, increasing innovation adoption, and raising export levels

**Places:** accelerate economic growth of local areas by building on their unique strengths and assets – for example there are significant clusters of manufacturers in Rochdale and Tameside that could be at the forefront of adopting advanced materials and manufacturing methods

# Greater Manchester Local Industrial Strategy

June 2019



## IMPLEMENTATION

- **Joint ownership:** GMCA, Greater Manchester Local Enterprise Partnership and HM Government
- A **GM Programme Delivery Executive** coordinates delivery locally, chaired by the GM Lead Chief Executive for Economy/Business.
- A joint **Government-Greater Manchester Implementation Group will be established**, comprising senior officials from both government and GM.
- Annual presentation to the **national Industrial Strategy Council**, chaired by Andy Haldane (Chief Economist, Bank of England).

**GREATER  
MANCHESTER**  
**DOING THINGS DIFFERENTLY**



# Greater Manchester's International Ambitions and FDI Successes

Andrew Toolan, Head of Strategic Partnerships,  
MIDAS



# MIDAS

Andrew Toolan, Head of Strategic Partnerships  
February 2020

- Established 25 years
- Greater Manchester's inward investment agency
- Strategic Priorities
  1. To attract Inward Investment into Greater Manchester
  2. To support the expansion of existing investors in the region
  3. To promote Greater Manchester as a leading business location
- Principle funding comes from local government, have also leveraged Government (DIT) funding for delivery of account management programmes and private sector funding for enhanced campaign and marketing activity
- Principle output/measured - job creation





# Services

**Research including  
benchmarking**

**Expansion  
support**

**Marketing and  
PR support**

**Relocation  
support**

**Property solutions**

**Networking**

**Recruitment  
and training**

**Financial  
solutions**



# Supporting Mayoral Agenda

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Digital



Green City



Inclusive Growth





# Sectors Focus

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Creative, Digital and Tech ▶

Financial & Professional ▶

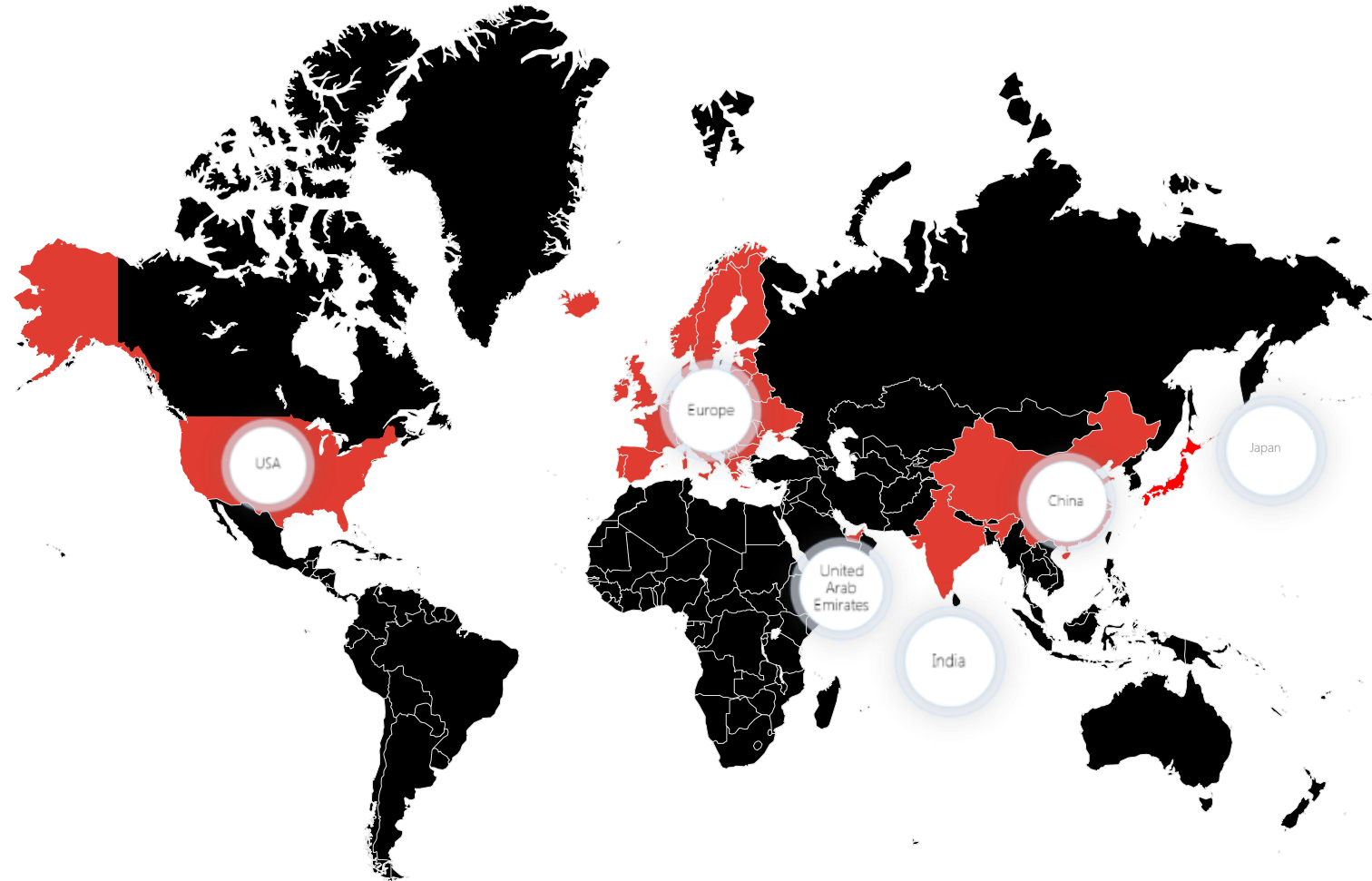
Advanced Manufacturing ▶

Life Sciences ▶





# Our key markets



曼彻斯特  
英中协会  
Manchester  
China Forum

 Manchester  
India  
Partnership



# Recent Investors





# Investor Case Study

- MIDAS have worked with Handelsbanken for 10+ years, first supporting them during the growth of their branch network and also their first HQ at Manchester Airport
- In 2018, the bank decided to expand, taking 40,000 sq ft of new office space in central Manchester
- In 2019, expanded by 11,000 sq ft in 101 Barbirolli Square
- MIDAS supported on business case and property searches, working with their agents to help identify the property
- The Manchester office is part of Handelsbanken's plan to create a UK subsidiary which will invest in infrastructure, systems, and "further UK-based expertise", which the bank said would be set up "as a result of Brexit".

## Handelsbanken





Thank you



**Victoria Braddock,  
International Marketing Director,  
Marketing Manchester**

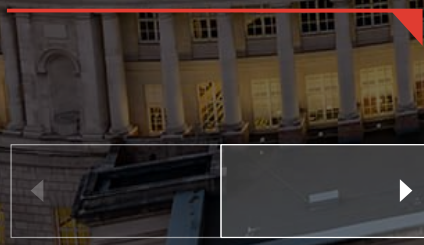
*Visit, Invest, Meet, Study*



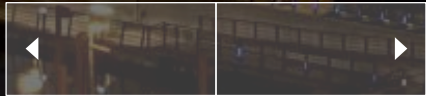
# Welcome to Manchester



# Marketing Manchester



# Promoting Greater Manchester on the national and international stage





03 —

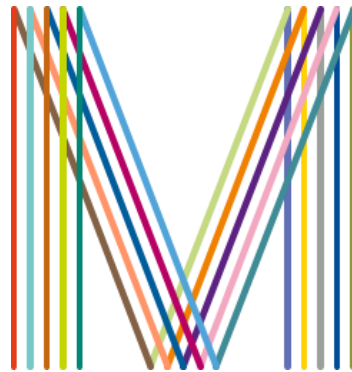
# Marketing Manchester overview

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To market Greater Manchester to visitors

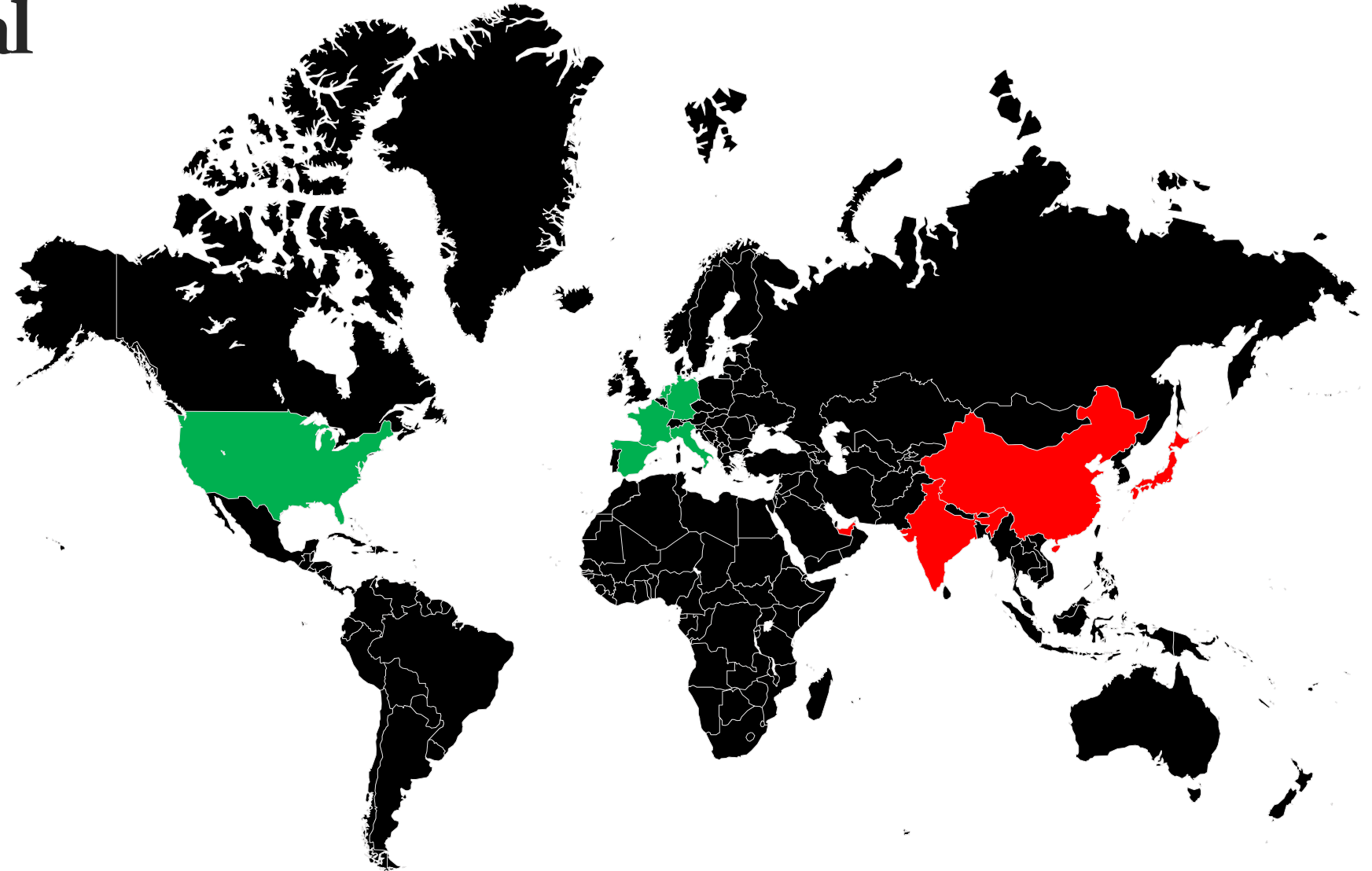
To promote Greater Manchester as a place to invest, do business, live and study

To undertake marketing and communications on behalf of the Manchester Growth Company, Marketing Manchester's parent company





# International Markets



## Prime markets

USA

China

Europe (DE, FR, NL, ES IT)

UAE

India

## Opportunity Markets

Australia

Japan

# Marketing Plan & Partners 19/20

UK	China	US	India	Europe	GCC
GMCA, MIF, TFGM, BID	CTRIP, MCFC	Virgin Atlantic	Cox & King	Ryanair & Easyjet	Wego
April –March	Year Round	May – October	Year Round	May-October	March
Unmissable Weekends Unmissable Sport	Heritage & Shopping	Adventure, F&D, Culture	Sport, Heritage	Culture, Sport	Shopping, F&D

# Marketing Plan & Partners 19/20

UK	China	US	India	Europe	GCC
GMCA, MIF, TFGM, BID	CTRIP, MCFC	Virgin Atlantic	Make My Trip	Ryanair	Wego & Taste of Dubai
April –March	Year Round	May – October	Year Round	Feb - March	March
Unmissable Weekends Unmissable Sport	Heritage & Shopping	Adventure, F&D, Culture	Sport, Heritage	Culture, Sport	Shopping, F&D



# Segmentation – Themes & Markets



Heritage



Culture



Music



Sport

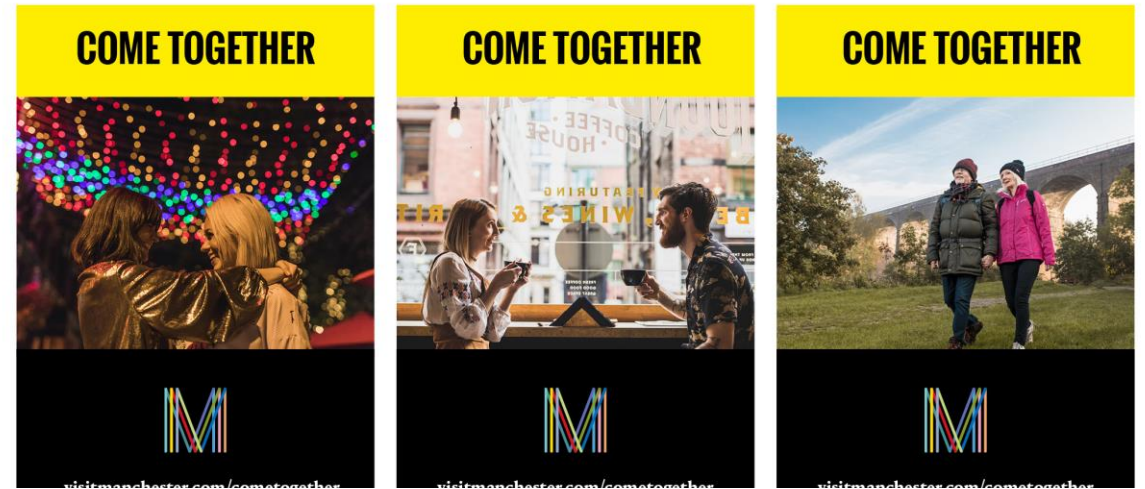


LGBT

# Brand: Shared Story in action



- **Audience:** Inward Investment



- **Audience:** Tourism Leisure







# MANCHESTER... A CITY THAT THINKS A TABLE IS FOR DANCING ON

Your long weekend is calling.  
Fly nonstop to Manchester,  
England with Virgin Atlantic.

[manchestertrip.uk](http://manchestertrip.uk)



visitManchester

virgin atlantic



# MANCHESTER... A CITY THAT SHINES WHATEVER THE WEATHER

Your long weekend is calling.  
Fly nonstop to Manchester,  
England with Virgin Atlantic.

[manchestertrip.uk](http://manchestertrip.uk)



visitManchester

virgin atlantic

# Unmissable Weekends in Manchester

A photograph of two women dancing at night. The woman on the left has dark hair and is wearing a dark, shiny jacket. The woman on the right has blonde hair and is wearing a light-colored jacket with some text on it. They are both smiling and appear to be in a festive setting. The background is dark with many colorful, out-of-focus lights in shades of yellow, orange, red, green, and blue, creating a bokeh effect.

Create yours at [visitmanchester.com](http://visitmanchester.com)

# UK Campaigns



SCIENCE AND INDUSTRY MUSEUM, MANCHESTER



EAST LANCASHIRE RAILWAY, BURY



Photo credit: The Discovery Centre

Z-ARTS, MANCHESTER



MANCHESTER MUSEUM, MANCHESTER

**Unmissable  
days out in  
Greater  
Manchester**

Create yours at  
[visitmanchester.com](http://visitmanchester.com)



# Partners:



# MM Performance Highlights 18/19

## DOMESTIC CAMPAIGNS

**£27m**  
additional visitor spend

**30.5m**  
consumers reached

## INTERNATIONAL CAMPAIGNS

GCC      India  
**£19m**      **£5.8m**  
Experience      campaign  
England campaign      53m reach

CHINA      Europe      USA  
**£5.7m**      **£3.19m**      **£1.6m**  
campaign      campaign      campaign  
15m reach      33m reach      190m reach

## BUSINESS TOURISM

 **22**  
conferences won

 **48,130**  
delegates predicted to attend

 **£132.3m**  
economic impact of association conferences won

## DIGITAL

**2.9m**  
visitors

**3,202**  
pages published annually

VISITMANCHESTER.COM

### Social Media

 **267k**  
Twitter followers

 **96k**  
Facebook likes

 **53.5k**  
Instagram followers

## MANCHESTER IN THE MEDIA

**215**  
journalists hosted

**1.1billion**  
opportunities to see

**1,207**  
pieces of coverage

## TRAVEL TRADE

 **21,607**  
total figures for travel trade engagement


## MIPIM

**96**  
partners

**245**  
delegates

**41**  
press articles

Media coverage provided  
**26m**  
opportunities to see

 **1.7m**  
Twitter impressions

## SECTOR

 **1,448**  
B2B engagements

 **75,005**  
visitors to website

 **4,520**  
jobs created

**4,537**  
LinkedIn followers

 **4,537**  
LinkedIn followers  
44%

 **£321.7m**  
economic impact (GVA)

 **15.1m**  
media reach

An aerial photograph of a city at sunset. The sky is a mix of orange, yellow, and blue. In the foreground, there is a large, circular, classical-style building with a colonnade of columns. To the left of this building is a large, multi-story brick building with many windows. In the background, there are several modern skyscrapers, including a very tall one on the left. The overall scene is a mix of old and new architecture.

**Any questions?**

#onenorth

# The Northern Powerhouse





# The North today



**28** universities  
In the North, with 525,000 students

**3** county councils

**↓ 4.4%** unemployment rate  
(September 2017)

**23** major ports

**£330bn** GVA (2016)

**256** towns

**Five** of the UK's ten largest cities

**5** National Parks

**77%** economic activity rate  
(September 2017)

**6** UNESCO World Heritage Sites

**7.63 million** jobs

**£125,085** average house price

**73.4%** employment  
(September 2017)

**7** international airports

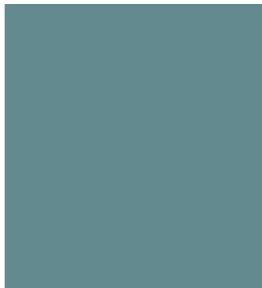
**43.9m** annual air passengers from Northern airports

**37** district councils

**15.4** million people

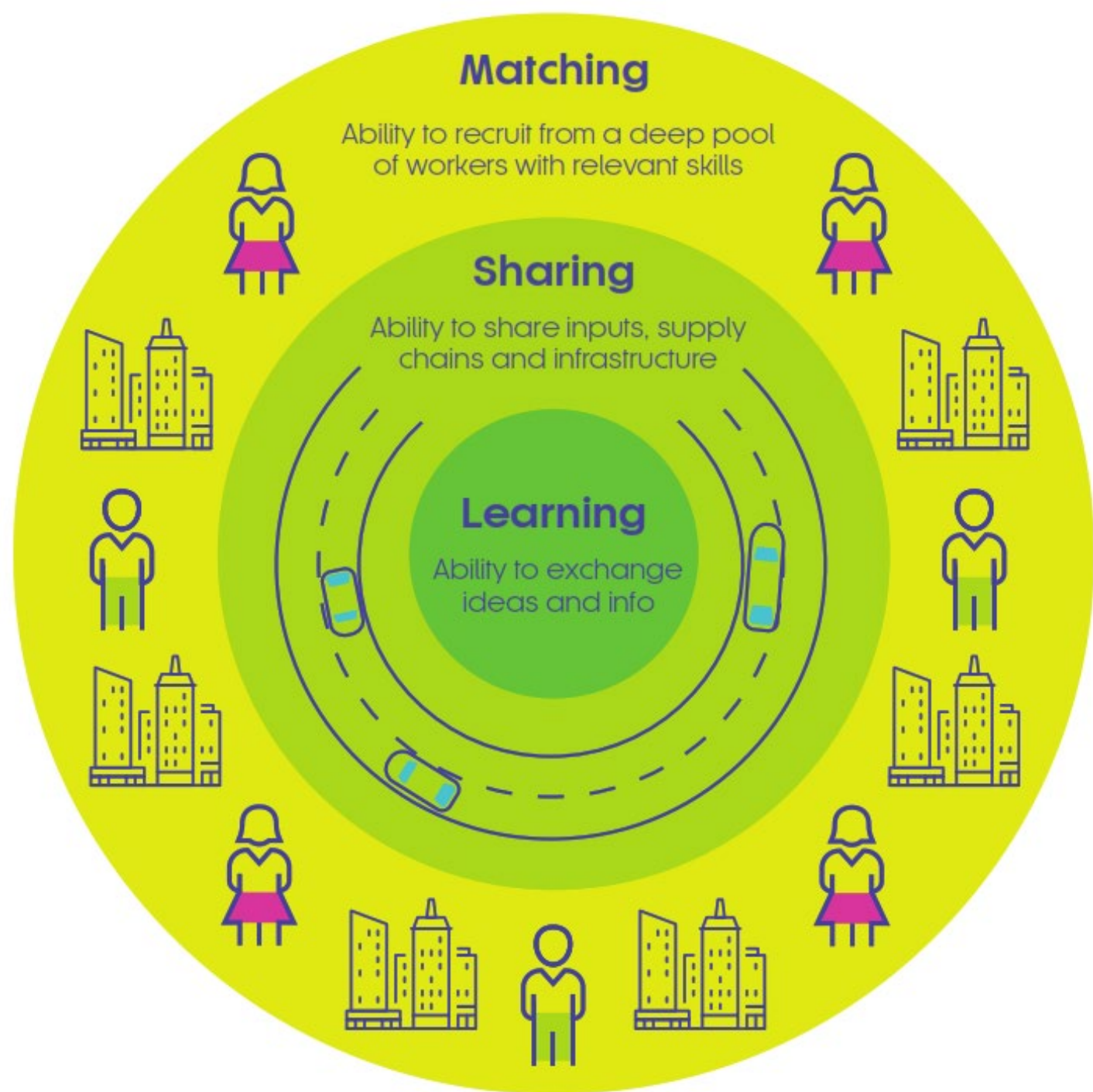
**11** local enterprise partnerships

**5** combined authorities



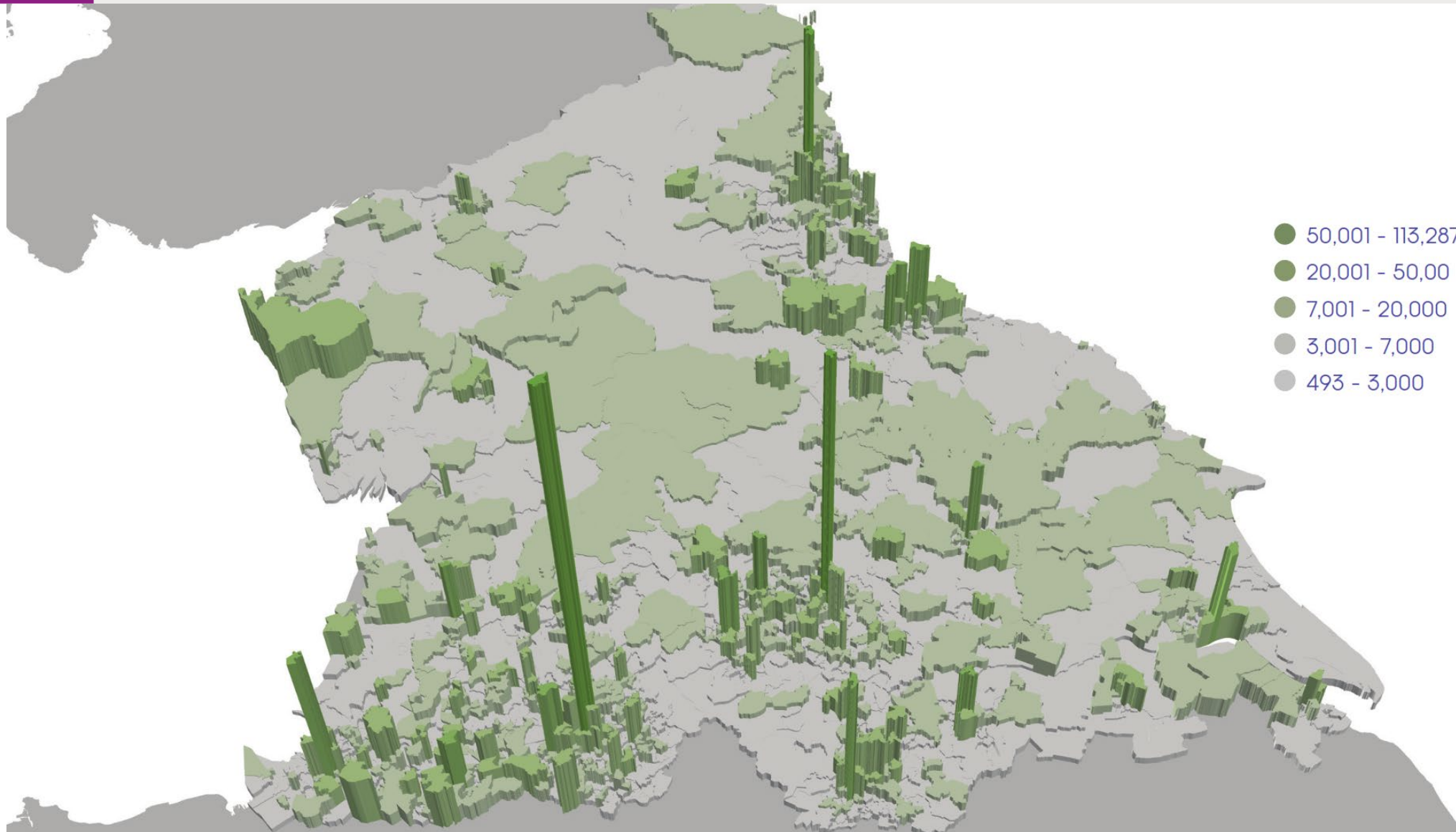


# Benefits of Agglomeration





# Employment distribution across the North

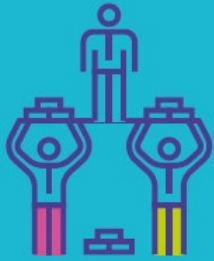




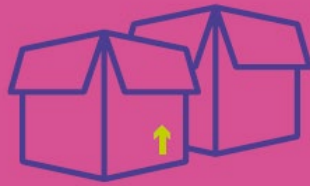
# The North's current employment density



Connecting people



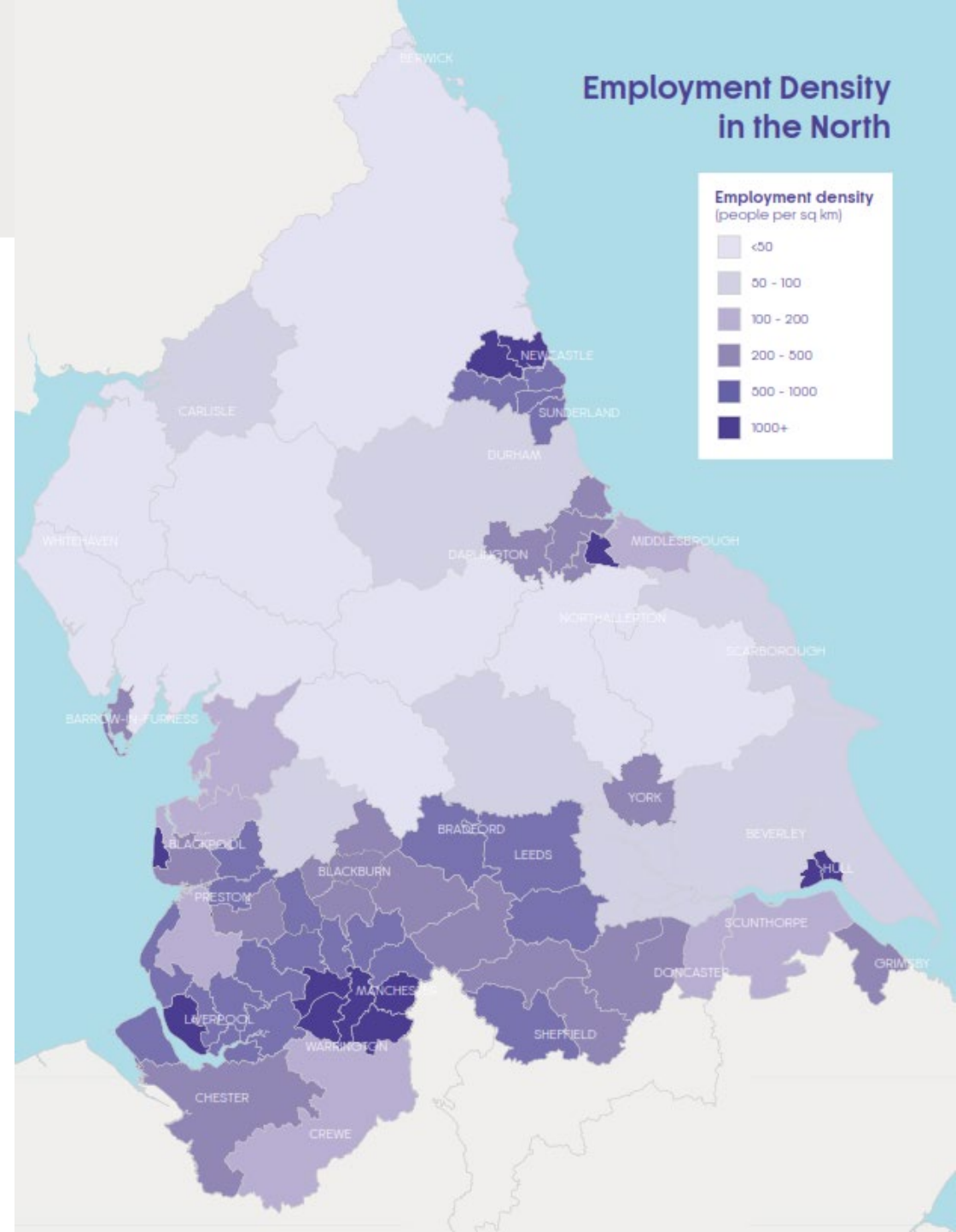
Connecting businesses



Moving goods

## Employment Density in the North

Employment density  
(people per sq km)



# Distribution of key capabilities

## PRIME CAPABILITIES

Advanced Manufacturing



Digital



Energy



Health Innovation



## ENABLING CAPABILITIES



Education  
(particularly Higher Education)

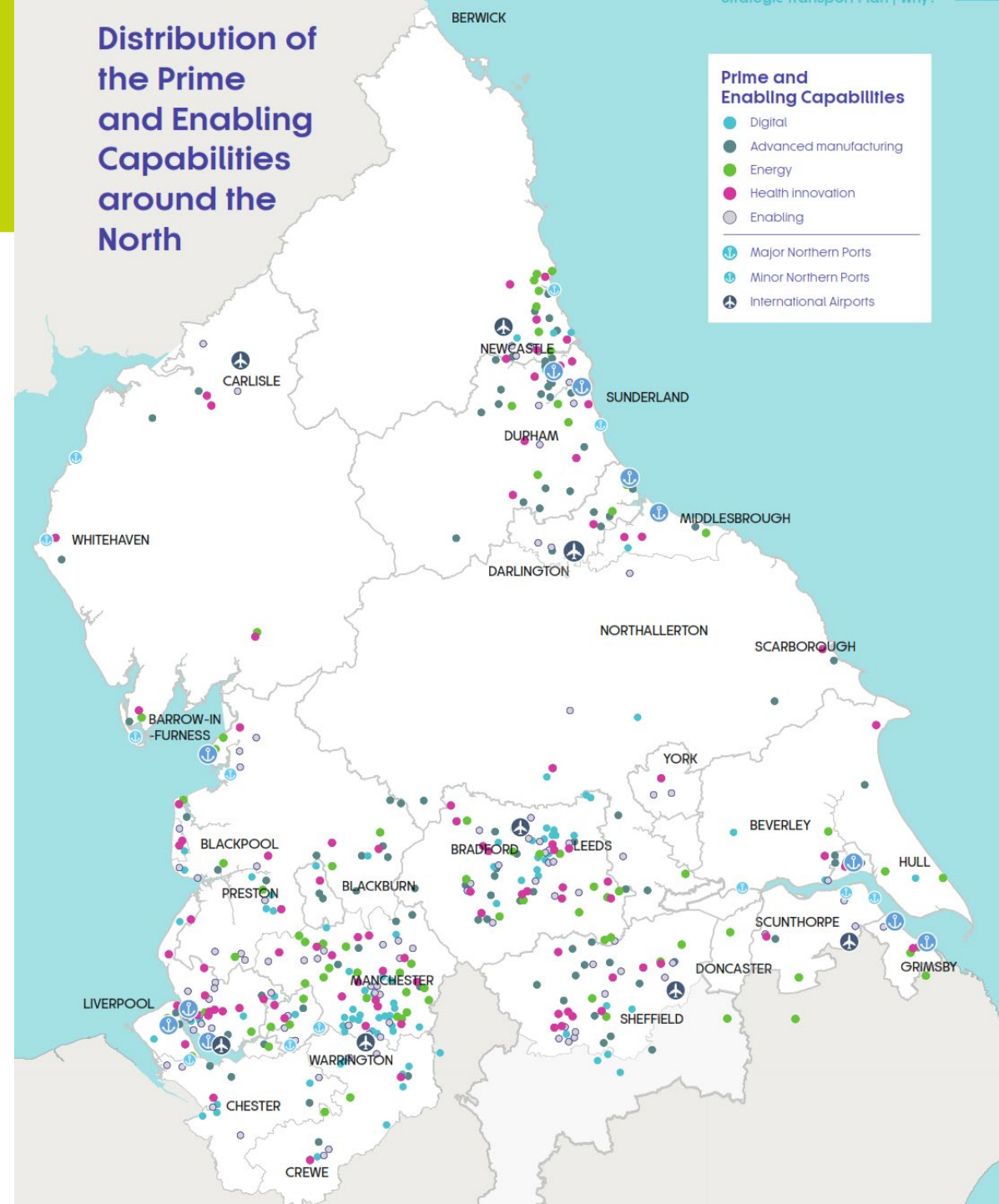


Financial &  
Professional Services



Logistics

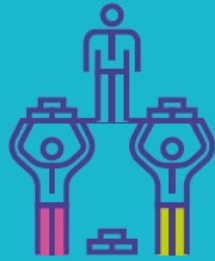
## Distribution of the Prime and Enabling Capabilities around the North



# A transformed Northern economy



Connecting people

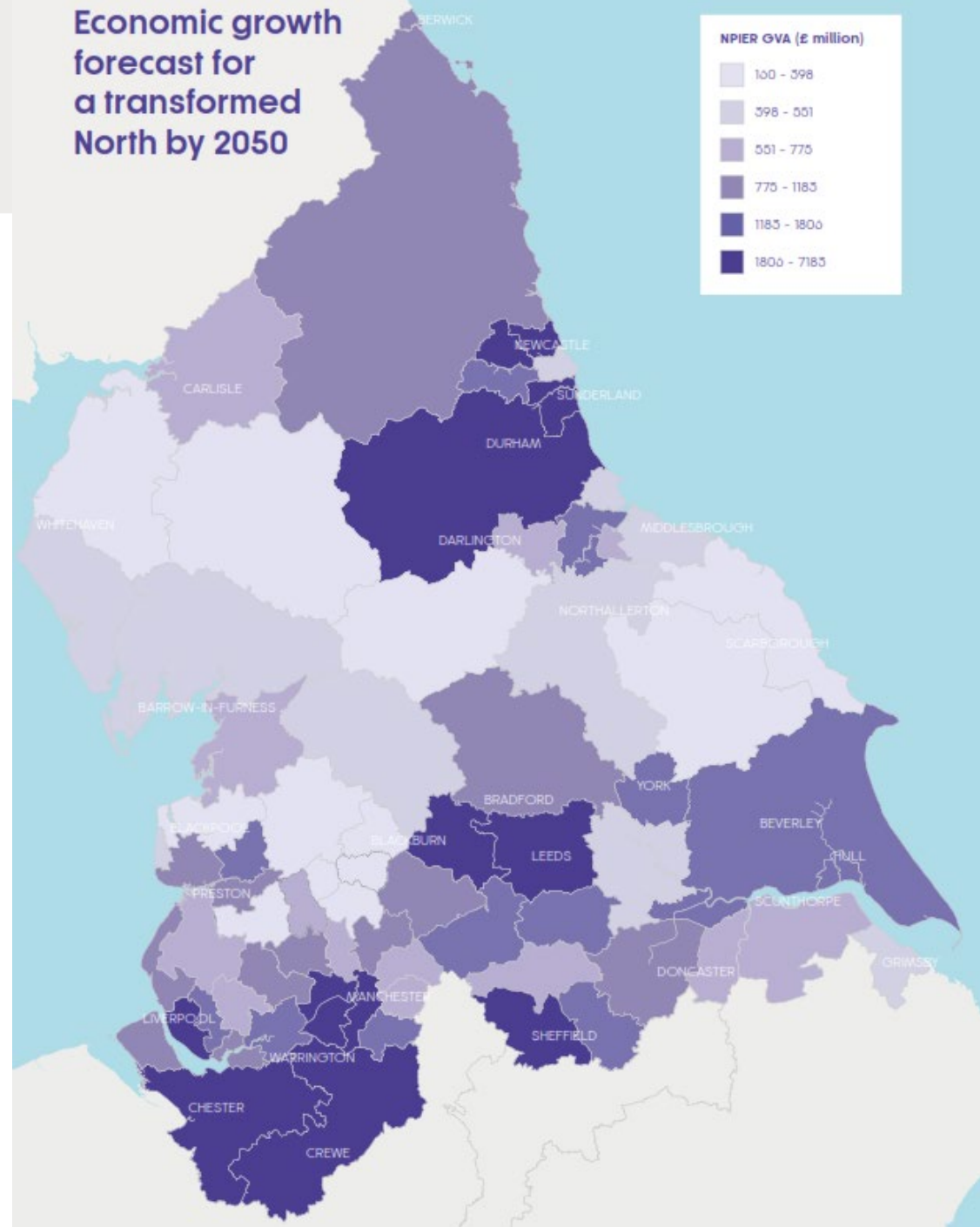


Connecting businesses



Moving goods

## Economic growth forecast for a transformed North by 2050





# A transformed North



	2015	2050 Business as usual scenario	2050 Transformational scenario (baseline for TfN)
 Employment	7.5 million	8.3 million	9.2 million
 GVA (2011 prices)	302 billion	603 billion	695 billion



#onenorth

# Transport for the North



# Our role and remit



Elected  
politicians



Business  
leaders

## Local Transport Authorities

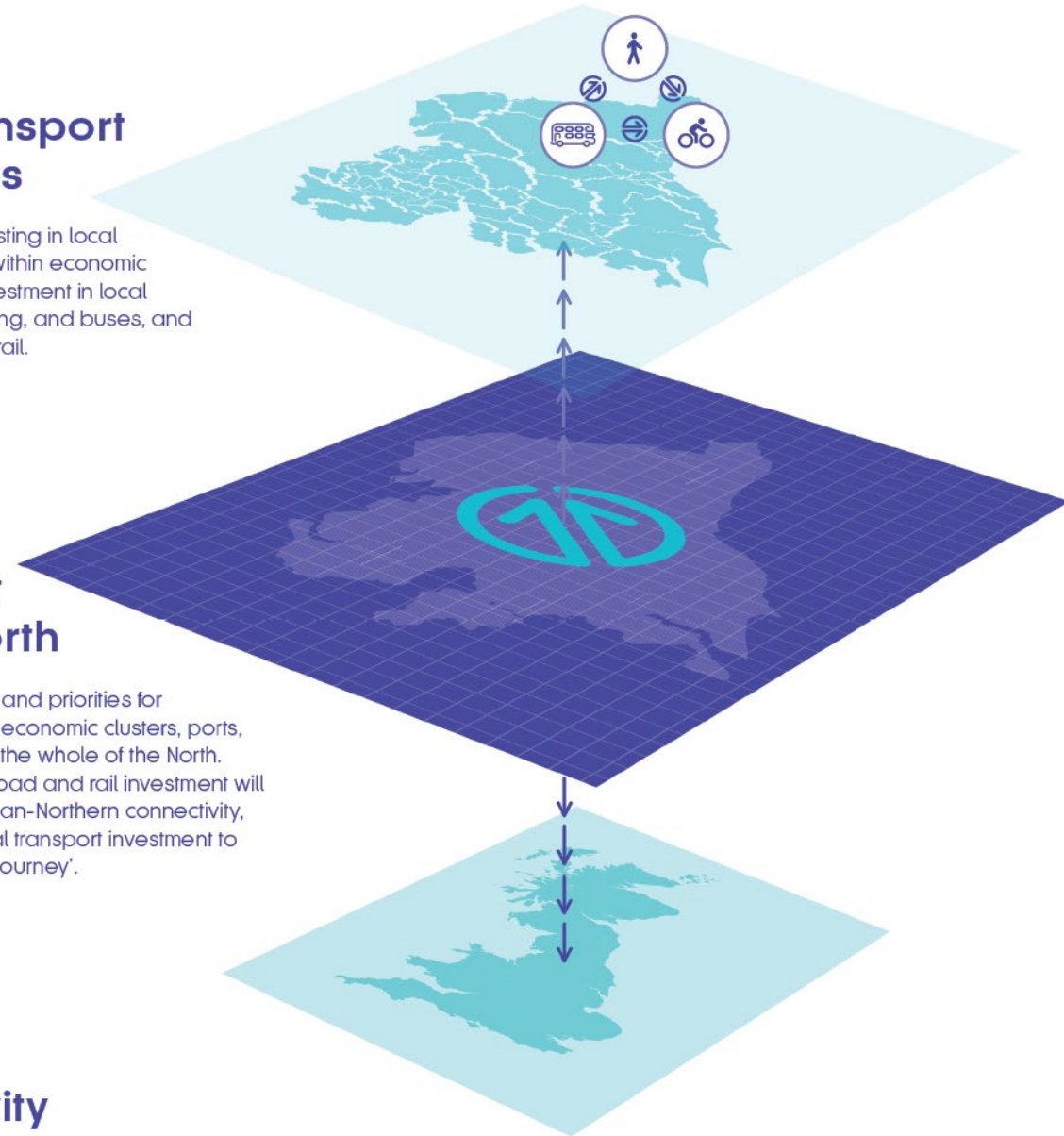
Managing and investing in local transport networks within economic clusters, such as investment in local roads, cycling, walking, and buses, and in some cases light rail.

## Transport for the North

Setting out the case and priorities for connecting different economic clusters, ports, and airports across the whole of the North. TfN's 'blue print' for road and rail investment will enhance strategic pan-Northern connectivity, complementing local transport investment to improve the 'whole journey'.

## National connectivity

Working with the Department for Transport and the North's cross-border authorities, the pan-Northern investments will support enhanced connectivity across the UK.





# The North's transport network



**26 minutes**

average travel time to work



**1.54**

Vehicle occupancy



**3,800km**

total kms of rail



**13km**

Average commute

**+8%**



increase in road trips  
between 2012-2016



**222.9 million**

passenger rail journeys

## Mode shares for travel to work

**75%**

Car

**14%**

Other

**7%**

Bus

**4%**

Rail



**85,580km**

total kms of road

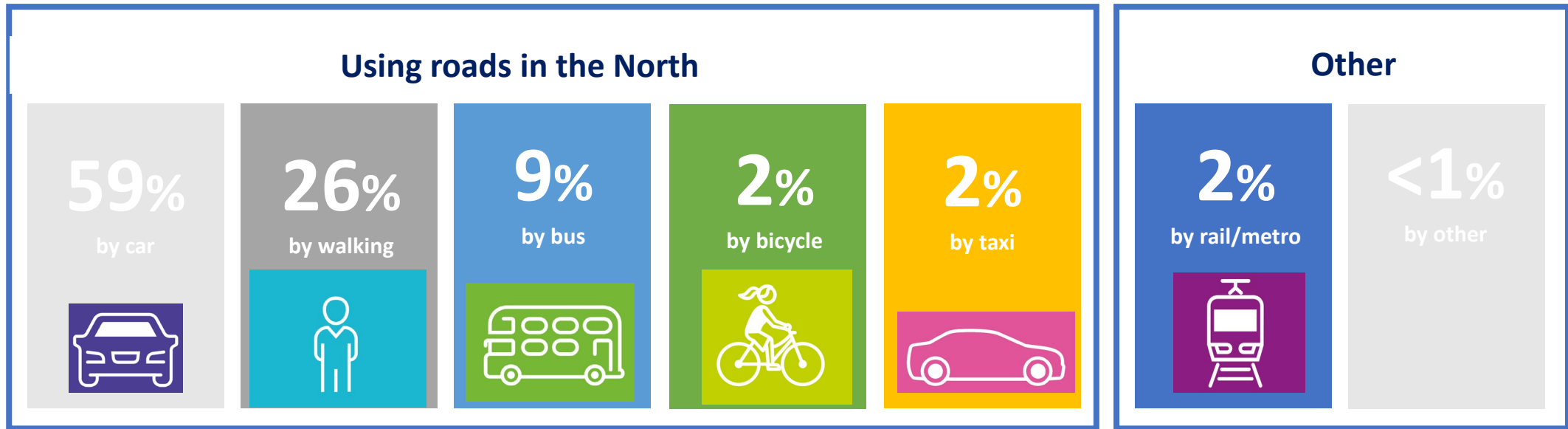


**207%**

Rail demand increase  
since 1995/96

# How do we travel– an inconvenient truth?

## % of trips in the North



90%

of commuting by car only has one occupant



87%

of freight trips in the North take place on the roads



The number of **east-west** dual carriageway links between Glasgow and Birmingham

1

18%

The increase in alternative fuel car purchases in Q1 of 2019





# Pan-Northern transport objectives



Transforming economic performance



Improving inclusivity, health, and access to opportunities for all



Promoting and enhancing the built, historic, and natural environment



Increasing efficiency, reliability, integration, and resilience in the transport system



# Transport connectivity and the economy

How does transport impact the economy:

- **Faster, more frequent, more reliable journeys** – reduced commuter and business costs (both welfare and real)
- **Better matching** of people to jobs (increasing quantity and quality of employment)
- **Enabling dense urban centres** of employment (agglomeration)
- **Land-value uplift**, bringing forward investment into housing, commercial and urban realm



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# A more flexible future?




Connectivity



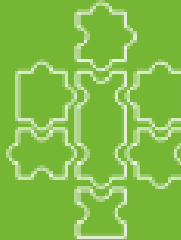
Climate emergency




Future of work?



Housing



Places



Prosperity



Future North





# Strategic Transport Plan



## WHY



£ Northern Powerhouse & UK Economy



Aims of the Plan



Inclusive & Sustainable Growth

## WHAT

Strategic Development Corridors



Major Road Network

Strategic Rail



Integrated and Smart Travel



Northern Powerhouse Rail

## HOW



Innovation



Funding



Skills



Spatial Planning



Analysis & Appraisal

### By 2050



£100bn increase in GVA



850,000 additional jobs



Investment Programme

# Distribution of key capabilities

## PRIME CAPABILITIES

Advanced Manufacturing



Digital



Energy



Health Innovation



## ENABLING CAPABILITIES



Education  
(particularly Higher Education)

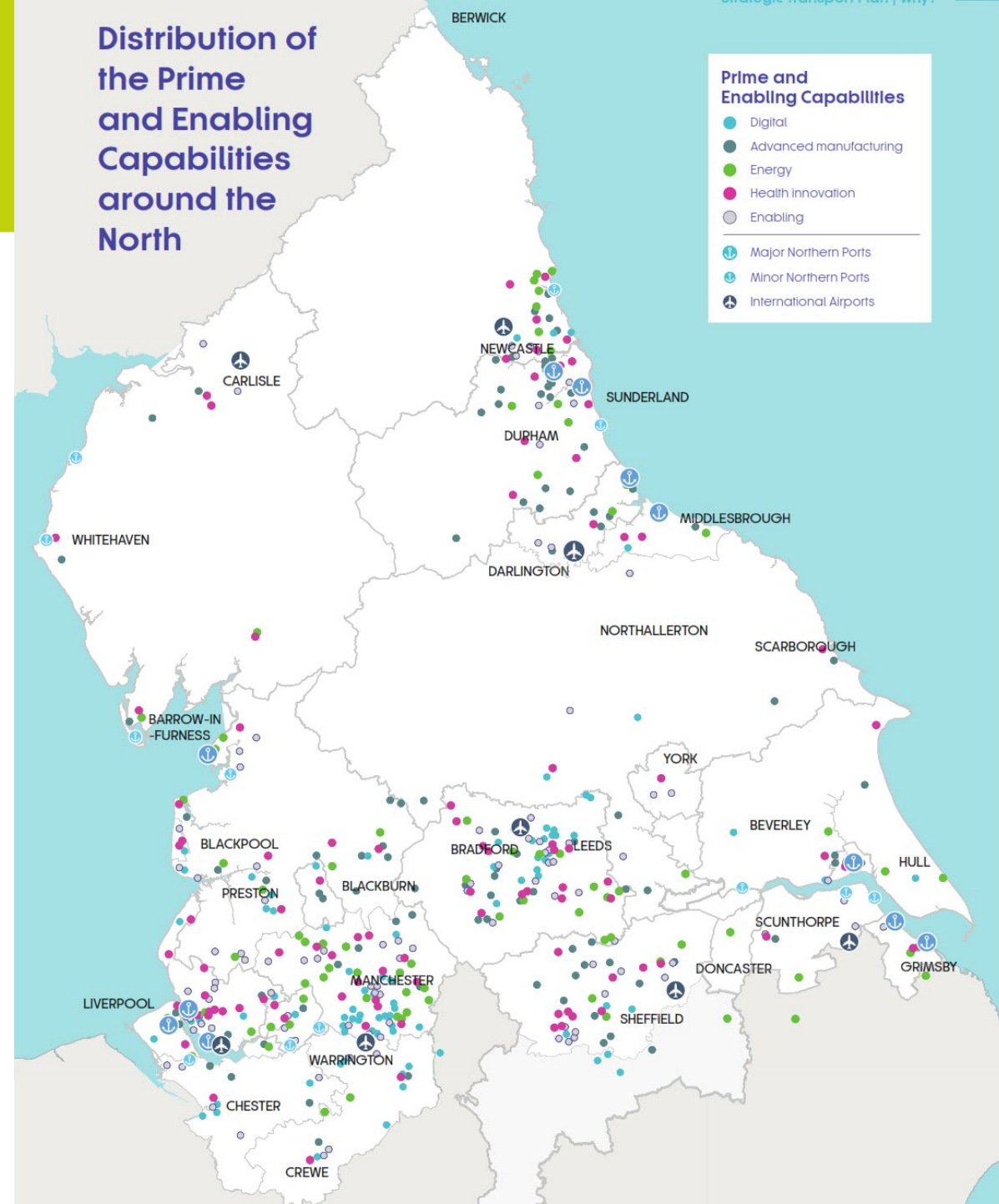


Financial &  
Professional Services



Logistics

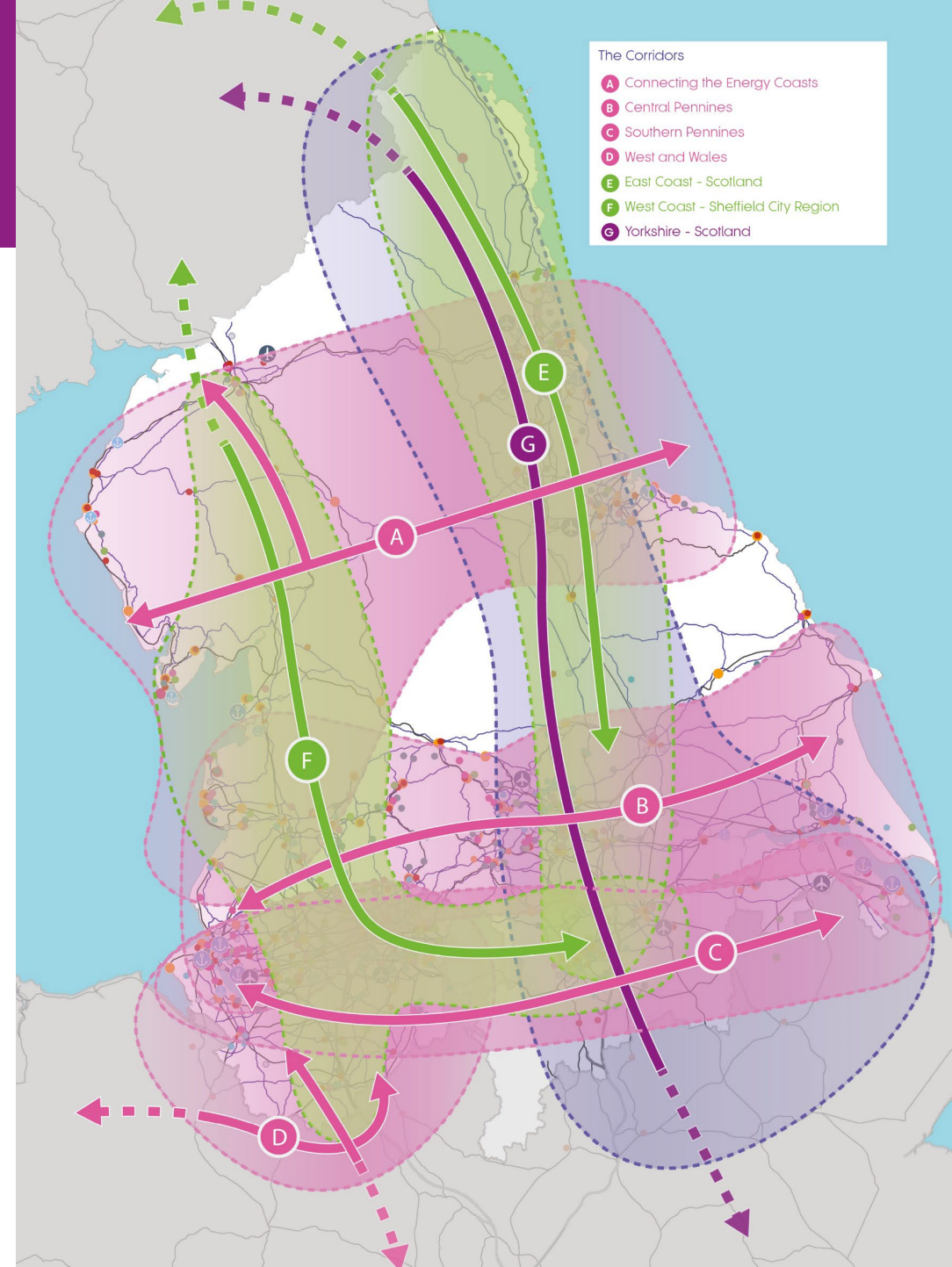
## Distribution of the Prime and Enabling Capabilities around the North



# Strategic Development Corridors

Developing the major strategic transport interventions along economic growth corridors

- A** Connecting the Energy Coasts
- B** Central Pennines
- C** Southern Pennines
- D** West and Wales
- E** East Coast to Scotland
- F** North West to Sheffield City Region
- G** Yorkshire to Scotland

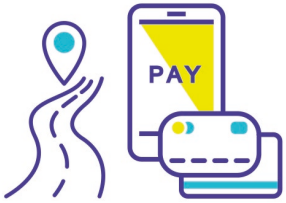




# Major Road Network for the North



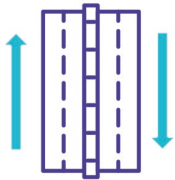
**Journey Reliability**



**Network Efficiency**



**Network Resilience**



**Journey Quality**





Connectivity benefits, journey time improvements,  
capacity enhancements, and reliability improvements

Great North  
Rail Project



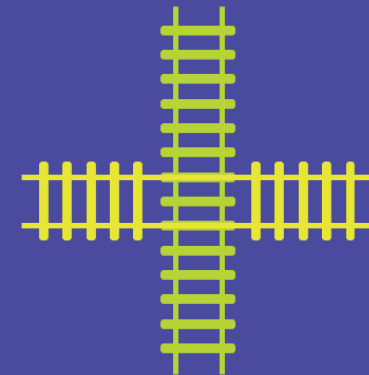
North West  
electrification



Ordsall Chord,  
Manchester Victoria  
Station and  
Castlefield Corridor  
improvements



Liverpool  
City Region  
upgrades



Calder Valley  
upgrade

# Northern and TransPennine Express franchises – £1.5 billion investment

Franchise  
investment



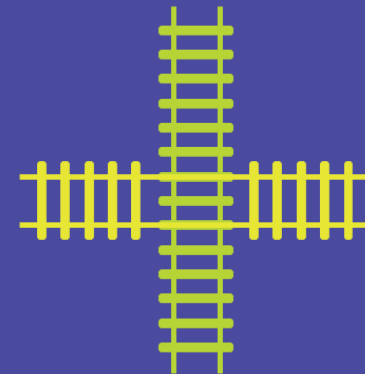
Over 500 new  
train carriages  
and refurbished  
trains



£60 million  
investment in  
stations



40% increase in  
capacity for  
40,000 more  
passengers per  
day



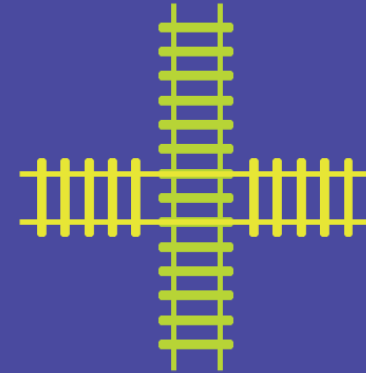
2,000 extra  
services a  
week by  
2019

Transpennine  
Route  
Upgrade

Reducing journey times further and increasing capacity between Manchester, Manchester Airport, Huddersfield, Leeds, York and Selby, and beyond to Liverpool, Hull, Scarborough, Middlesbrough and Newcastle.



40% increase in capacity for 40,000 more passengers per day



Enable better journeys for passengers from 2022.

## High Speed 2

HS2 is a central part of the rail proposition for the North.



Building both legs will deliver the strategic reductions in journey times and extra capacity, and support Northern Powerhouse Rail

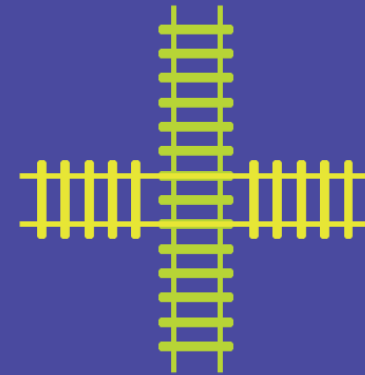


New hub stations planned at Piccadilly, Leeds and Crewe, with improvements to stations beyond the core network



Birmingham to Manchester in 40 minutes

Liverpool to London in 96 minutes



Phase 2a to Crewe in 2027

Phase 2b to Yorkshire, North East and North West in 2033

Northern  
Powerhouse  
Rail

⇒ Bring Manchester Airport within 90 minutes reach for 3 million more people



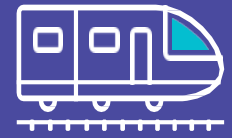
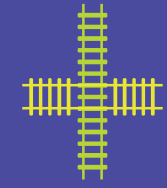
Provide more capacity for passengers



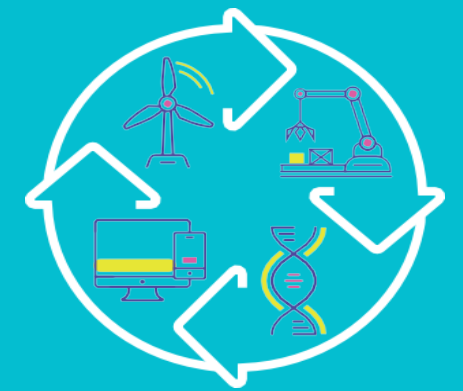
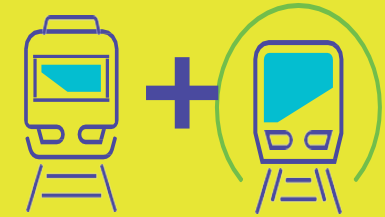
By 2050 1.6 million will be able to access multiple places within an hour by 2050 compared with just 52,000 today.



Free-up space on existing lines and local services



Integrate with HS2 and other rail schemes to maximise benefits for the North



Better connect the North's economic assets and clusters



## Northern Powerhouse Rail

Increasing the value of place, creating uplifts in residential property in the region of up to 5.4% for local areas that are very well connected by rail.

Total expected uplift or increase in value in the residential property market is estimated at £2.9 billion in a single year (based on 2017 property values).

64,000 daily road trips off the road = 800m road kms per year

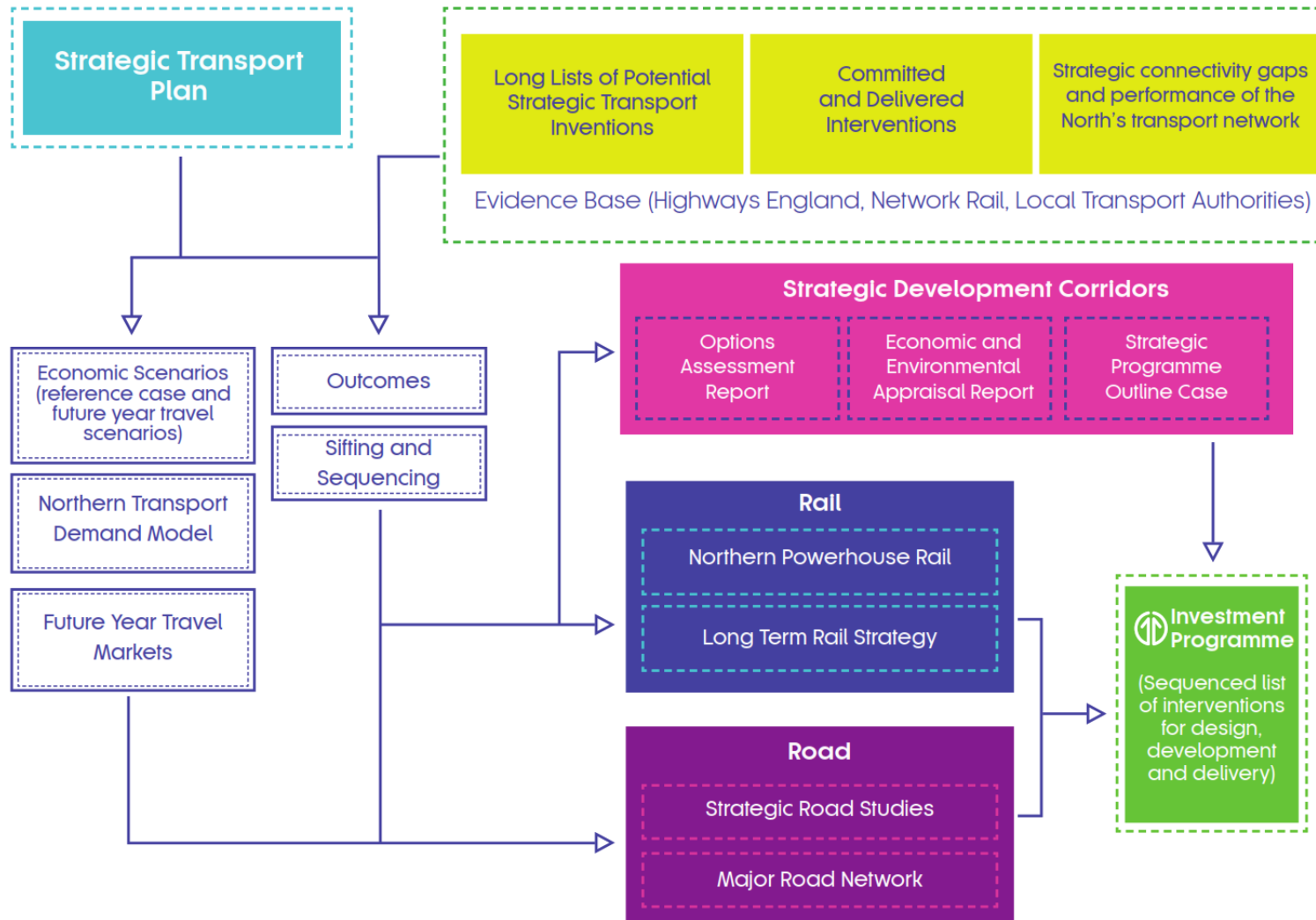
Potential to bring forward new commercial and residential development by making places more attractive for private sector investment through improved accessibility.

Northern Powerhouse Rail aligns closely with the development plans of the towns and cities being served by the network. Some of these locations already have significant commercial and residential development already in place or planned.

Unlocks 300 hectares of development potential.



# TfN Investment Programme



## Four components of the Investment Programme:

- Committed Interventions
- Specific Interventions before 2027 – Already in Industry Processes
- Specific Interventions before 2027 – Additional TfN Priorities
- Further Potential Interventions

## Additional funding

Further funding may be required once work programmes have completed

**£21 – 27 billion**

Additional required for transformational strategic transport

**£39 – 43 billion**

Continued levels of strategic transport funding



**TfN is seeking to move to the position where it becomes responsible for a combined transport settlement for the North**

By the North  
For the North

**#onenorth**  
**@transport4north**  
**transportfornorth.com**

