

## **Economy, Business Growth & Skills Overview & Scrutiny Committee**



**Date:** 13<sup>th</sup> July 2018

**Subject:** GM Internationalisation Strategy Implementation Plan Update

**Report of:** John Steward, Principal: Digital growth and Internationalisation Policy

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### **1.0 PURPOSE OF REPORT**

To report to Scrutiny Committee on the review of the Internationalisation Strategy on the progress with the implementation of the GM Internationalisation Strategy, the key actions proposed for the next 18 months and the key issues, including Brexit, impacting on its delivery.

### **2.0 RECOMMENDATIONS**

That the review of the GM Internationalisation Plan is noted and comments on forward priorities are invited.

## **1.0 Progress**

- 1.1 The GM Internationalisation Strategy 2017 – 2020 was approved by the LEP Board on 19 September and the GM Combined Authority on 30 September 2016. Its Implementation Plan was agreed by the Board on 17<sup>th</sup> November 2016. The formal launch of the Strategy took place on 4<sup>th</sup> July 2017. This Scrutiny Committee considered the Strategy at its meeting on 8<sup>th</sup> December 2017 and asked for an update following its mid-term review.
- 1.2 The Internationalisation Strategy is embedded within the Greater Manchester Strategy which was adopted in July 2017 and the priorities and actions set out in its Implementation Plan are embedded within the Manchester Growth Company Business Plan, inform the activities of the GM Combined Authority and the work of key partners including the Universities and Manchester Airport.
- 1.3 This report has been informed by the private sector led Internationalisation and Marketing Board which considered the key issues that need to be taken into account moving forward since the approval of the Strategy at its meeting on 24<sup>th</sup> May so that they are reflected in our forward thinking. This concluded that whilst eight Strategy priorities remain robust, our actions (and tactics) to achieve the overall agreed outcomes need to be refined to reflect changing circumstances.
- 1.4 The purpose of this report is to present a mid-term review of the performance to date on the delivery of the outcomes set out in the Strategy and its implementation plan, set out the forward actions and highlight key issues emerging within the continuing volatile policy and economic environment.

## **2.0 Overview**

- 2.1 Our Internationalisation Strategy stated that our long term vision is to become a top 20 global city by 2035 as measured by:
  - Our attractiveness to international investors, visitors, business and academic talent and students;
  - Our international cultural and place offer and the propensity of our business base to trade internationally;
  - Our success as a key international gateway to the UK – and a gateway to the world for our UK businesses and communities.
  - The quality and ease of access and interconnectivity to all places across the city region to maximise the local benefits of Internationalisation across Greater Manchester communities.
- 2.2 The Internationalisation Strategy was prepared and agreed against a backdrop of considerable political change following the outcome of the EU Referendum. There continues to be uncertainty across a number of Strategy policy areas which are controlled at UK Government level. These include future trade and customs arrangements, UK immigration policy and the nature of the proposed UK Prosperity Fund which will replace existing EU Framework Funding as well as the negative impact of European leisure and business visitors feeling unwelcome. These will all impact on the delivery of our Strategy priorities both now and well beyond the 2020 Strategy period. We will therefore seek to continue to use all available routes to influence UK policy in

these areas. In this context there is the opportunity for GM to take advantage of our elevated public profile as a result of the increasing UK and international profile of the GM Mayor and Deputy Mayor.

### **3.0 Changes in UK/GM Forecast Growth**

- 3.1 The Greater Manchester Forecasting Model (GMFM) -2017 is more pessimistic about future growth prospects in both the UK and GM than GMFM-2015 (which was used as baseline for the Internationalisation Strategy). This is driven by slower projected growth in labour productivity, as well as the risks to trade and skills availability emerging from Brexit. These assumptions are in line with those being made by other forecasters. As a result of slower growth, GMFM-2017 forecasts that by 2035, total GVA will be £9.2 billion lower, employment 6,000 lower, and population 27,500 lower than in GMFM-2015.
- 3.2 The GMFM-2017 baseline forecast shows GVA growing at 1.7% per annum up to 2035, broadly comparable to the UK average (1.8% per annum). Total employment is forecast to grow at 0.5% per annum in GM, slightly faster than the UK average (0.4%), equating to a net increase of 141,000 employees from 2015 to 2035.
- 3.3 Employment growth is expected to largely be driven by Business, Financial, and Professional Services and also digital across multiple vertical sectors. Further job losses in Manufacturing are forecast, although increased productivity is expected to result in GVA growth in the sector.

### **4.0 Strategy Implementation overview**

- 4.1 The review has taken into account the work being undertaken to monitor the impact of Brexit (see separate paper on this agenda). Despite the challenges, solid progress has been made in delivering the outcomes we set out in the Strategy for 2020. The progress towards the delivery of the 2020 Outcomes under each priority have been marked with a “rag” rating under Appendix A. Within this table there is also a summary of the impact of Brexit across each priority (positive/negative or mixed).
- 4.2 Manchester Airport’s international business and tourist passenger numbers have already exceeded the 2020 target supported by successful route development strategy and helped in part through favourable exchange rates.
- 4.3 The pipeline of inward investment projects in Greater Manchester has held up well. However, Brexit uncertainty has manifested itself in the challenge of converting this interest into executed projects.
- 4.4 Following the launch of the Strategy there was little early evidence from business about any significant challenges in attracting and retaining international talent – despite this being raised during strategy preparation. This led to early actions in this area being put on hold. However, there is now increasing anecdotal evidence that the uniform application of salary thresholds across the UK is impacting on the ability of businesses in GM to attract international digital talent in particular. There have also been recent national headlines about firms are unable to recruit international talent in key shortage areas of digital and engineers because they were denied UK visa after monthly limits had been exceeded<sup>1</sup>.
- 4.5 International students continue to be included in the UKs immigration statistics – despite mounting evidence of their economic value to the UK economy. The appointment of Sajid Javid as next Secretary of State for the Home officer opens up the potential for further lobbying for

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<sup>1</sup> <http://www.bbc.co.uk/news/science-environment-44113324>

change. The Government has since announced its intention to treat EU students as home students during the first year post March 2019.

4.6 GM has worked hard to further strengthen its relationship with the Department of International Trade particularly at Northern Powerhouse level to align trade and investment priorities. Moving forward we will continue to press for greater emphasis to be placed on elevated export value over business numbers. We also intend to strengthen our strategic partnership with Visit Britain and direct route airlines and through GREAT campaign funding target international visitors, investors and conferences.

4.7 Market-specific initiatives originally seeded by the LEP such as the Manchester China Forum and the Manchester India Partnership are continuing to develop and mature, with partner interest growing consistently and creating further strategy off-shoots that are bespoke to those markets.

## 5.0 2017/18 Highlights

5.1 The key successes over the past twelve months are highlighted below:

### International promotion / tourism / profile

- **Securing £250,000 recovery funding to support promotional activities** to reduce the impact on tourist visitor numbers as a result of the May 2017 terrorist attack.
- There was an **increase in the number of international visitors to 1.4m in 2016** already surpassing the original target set by the Tourism Strategy for 2020 with growth in the USA and China. Figures for 2017 are expected in June.
- Delivery of a **new European campaign** in partnership with Ryan Air has grown market share in three key EU markets.
- Marketing Manchester has worked with Manchester Central and other venue partners on 59 international conference bids, **winning 20 with economic impact of £23million for GM.**
- Delivery of a 1 year **Team North initiative** that strengthened communications and promotional channels between Marketing Manchester and other marketing teams across the North and National Campaign Partners including Visit Britain, the Arts Council England and the Department of International Trade.
- Marketing Manchester **hosted 291 international media** to GM delivering 371 pieces of coverage and providing 350million 'opportunities to see'.
- 148 social media influencers were also hosted in GM over two weekends, creating a social media reach of 62million and over 2000 posts.
- The **new Study Manchester online platform** was launched aimed at promoting Greater Manchester to international students supported by all GM Universities

### International Trade / Exports

- Based on latest HMRC figures (2016) **GM total exports now stand at £6.4billion**, 23% of the North West total and 2% of the UK total. This represents a significant 16% rise, following only 3% growth from the level in 2014 to 2015. The EU accounted for approximately 58% of exports in GM in 2016, in line with both 2014 and 2015.
- **Enhanced trade export data** from HMRC **significantly** so that we can better understand our performance across key markets and more effectively target the trade support services delivered through the Business Growth Hub.
- **£15m commitment by Department for International Trade (DIT) to support 17 trade missions across the North** in 2017/18 to support priority sectors and markets. (7 x EU, principally targeted at those new to exporting, 2 x UAE, 1 x India, 3 x China and 4 x USA),

### International Target Markets

- Collaborative working with the Department of International Trade in the development of **joint missions to key target markets including USA, China and India.**
- **The Manchester India Partnership** was successfully launched in February both in Mumbai and London, supported on both occasions by DIT Minister Baroness Fairhead. The MIP already has a solid group of founder members that are part-financing the initiative, which include MIDAS, Manchester Airport, Deloitte, Squire Patton Boggs, Manchester City FC, ICICI Bank, Salford University and Bolton University. The MIP has already won Trade & Investment Promotion Organisation of the Year at the prestigious UK-India Business Awards in June 2018.
- Building on the success of the **new direct route from Manchester Airport to China** which has substantially increased the volume of freight trade and visitor numbers supported with a £1m trade and consumer campaign in partnership with Hainan Airlines and Visit Britain. Marketing Manchester and its partners also supported the **new US direct routes from Boston and San Francisco** with a joint VisitBritain/Virgin Atlantic marketing campaign and GREAT funded in-market activity focussed on life sciences and travel
- A **direct flight to India has been secured**, with Jet Airways announcing that it will be flying from Manchester to Mumbai 4 days a week from November 5<sup>th</sup> 2018 and daily from March 2019.
- Working with the private sector to **improve “in market” presence in our target markets.** MIDAS extended the in-market presence in India, extending in market resource locations to include Delhi as well as Bangalore, connecting to the IT and Life Sciences/Medtech clusters. Negotiations are now underway to develop a similar in-market presence in China, and the US.

#### **Inward Investment**

- We have created the **“MIDAS Partnership”**, a partnership of 8 of the major property developers across GM that are contributing significant additional funds to support inward investment promotion.
- **MIDAS has increased its project intake by 57%** due to the additional investment from the MIDAS Partnership and the GMCA, now accounting for 6.1% of UK FDI according to the latest EY European Investment Monitor figures. MIDAS has increased its account management programme by 150 companies, helping to mitigate against the uncertainty around Brexit, funded by DIT.
- **MIDAS has secured a “High Potential Opportunity” (HPO) pilot with DIT**, which is one of three such pilots across the UK. The pilot entails the creation of a joint proposition with DIT on GM’s strengths in advanced materials and in particular light weighting, aimed at attracting companies supplying the NW Automotive and Aerospace supply chains, looking to site such investments in industrial sites such as the Northern Gateway in Bury, Rochdale and Oldham.
- MIDAS inward investment activity led to **apprentice opportunities across GM local authorities.**
- Continued international investment activity and reach is being achieved through Manchester at **MIPIM partnership, in 2017 the delegation was the most significant to date with** 113 companies and 274 delegates attending including six of the ten GM Local Authorities (Manchester, Salford, Trafford, Bolton, Oldham and Rochdale) promoting GM investment opportunities internationally and forging partnerships.

The above are highlights the areas of success over the past twelve months. Annex A provides a summary of how we have performed against the planned outcomes under each priority.

## **7.0 Strategy Actions for 2018/19**

7.1 The following summarised the key strategy actions under each priority for the next financial year. These are highlighted actions for the next 18 months which are drawn from a more detailed action plan.

### **Priority 1 - Global Gateway for the UK and the North**

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- Build on the significant progress already made in the implementation of Manchester Airport's Route Development Strategy. The priority is to secure new direct routes in line with MAG priorities including Thailand and a second China route, seeking new direct services to Shanghai and Guangzhou – supported by a Mayoral visit in September 2018.
- Pressure will continue to be exerted on Government to ensure the option with the most positive economic impact from HS2 is supported.
- Build upon the Manchester India Partnership and the recent success in attracting a direct route to Mumbai, by securing a new direct route to Delhi.
- Secure funding to develop a pilot Northern hub digital platform to distribute GM and Northern bookable product internationally via Visit Britain and private sector platforms.
- Continue to strengthen strategic engagement channels into all four universities to facilitate collaboration and build a database of prominent university alumni in key markets/cities to drive sector/place marketing and network development.
- Develop a seamless travel offer for GM for all international visitors – focusing on the visitor experience.

### **Priority 2 - World Centre for Trade across key GM Sectors:**

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- Further strengthen GM's relationship with the Department of International Trade (DIT) including developing and shaping DIT missions for 2018/19 across the North and through the Northern Powerhouse Investment Forum with greater focus on mid-sized companies across key sectors and markets, as well as high growth SMEs programmes taking full account of our place strengths
- Align International Trade through the Growth Hub with the emerging GM Local Industrial Strategy and incorporate trade into wider business start-up and management development support to strengthen DIT support for GM objectives.
- Introduce 'Meet the Buyer' events in both UK and overseas to identify business opportunities in priority sectors through FCO colleagues to raise awareness of local business base strengths.

- Deliver a new Global Growth Service which is focussed on mid-sized businesses and provide diagnostic and brokerage services to private sector providers to drive up the value of export sales.
- Increase the profile of education as an important export for GM.
- Develop a new locally led, partnership based, GM international trade initiative that includes
  - Galvanising local businesses to exploit export opportunities
  - Full implementation of an international student placement programme
  - Launch of a Global Scale Up programme under the GM Business Productivity Programme to build resilient businesses able to respond to Brexit challenges.

### **Priority 3 - UK Magnet for FDI**

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- Implementation of MIDAS' multiplier strategy to extend in-market reach, and deepen relationships with the major property agents, site selection specialists/location consultants and trade bodies.
- Increase in-country engagement in Japan and continue to develop relationship with London Embassy, DIT post and honorary Consul.
- Secure additional Manchester China Forum funding to support in-country resource within that key market.
- Build on the newly established Manchester India Partnership to create further inward investment opportunities taking advantage of the recent announcement of the first direct flight from Manchester to Mumbai.
- Build on the inward investment work already being undertaken in mainland Europe and Brexit opportunities outlined above, including targeting of Irish food manufacturers that may need a UK base post Brexit and companies that are currently HQ'd on mainland Europe that may need a new UK HQ post Brexit.
- Develop a common programme of inward investment activity with DIT & Northern Powerhouse, identifying key activities for joint working/investment through the NPH & GM Trade and Investment Plans
- Deliver the High Potential Opportunity pilot with DIT, focussing on promoting Rochdale/Bury/Oldham through the building of a manufacturing/advanced materials proposition aimed at the aerospace and auto sectors.
- Develop a "NextGen" campaign for GM to attract high growth and innovative companies from key markets through initiatives including Deloitte Fast Tech 50 and M&A analytics tools that track CVC investment
- Track development of tech departments in non-tech companies, to spot opportunities to attract new tech functions to GM from major blue-chips.

#### **Priority 4 - Portfolio of Prime FCI Opportunities**

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- Develop a pipeline of GM foreign capital investment (FCI) opportunities, working closely with GMCA and private partners through the GM Investment Group and DIT.
- Review GM presence at wider FCI marketing events such as Expo Real (Germany) and MIPIM Asia.
- Implement new model for resourcing FCI through partnership model with external specialists and agree with stakeholders, with the option of an outsourced/partnership model with the private sector trialled.

#### **Priority 5 Strengthened international research capabilities & International Talent Base**

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- Confirm local intelligence on the increasing challenge of sector salary thresholds which is impacting on our competitive position to attract and retain international talent in key growth sectors because it is applied uniformly across the UK.
- Continue to explore the potential for a Manchester Visa to address gaps in key skills with a particular focus on digital and engineering to action once UK Immigration policy becomes clearer.
- Work with Northern Powerhouse Partnership and core cities towards a collective cities approach on salary thresholds with Government that is sensitive to place.
- Influence UK Government in shaping the ERDF/ESIF replacement “Shared Prosperity Fund” through membership of the UK DEEU working group to support key GM research investment activities.

#### **Priority 6 - The Best UK Destination for International Students**

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- Build on the launch of the GM Study Manchester online platform and work with all universities to secure a sustainable future for the platform to promote GM as a destination for international students.
- Undertake GM wide programme to promote blended learning programmes across key growth sectors including digital and engineering working with NCUK (a consortium of leading UK universities dedicated to giving international students guaranteed access to universities worldwide).
- Make a formal approach to the new Home Office Minister to push the removal of international students from UK immigration figures – taking advantage of further mounting evidence of its economic impact.

Note that there will be further deeper consultation with GM Universities over the summer to inform the forward plan for Priorities 5 & 6.

## **Priority 7: A World Class Visitor Hub**

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- Develop growth strategy for business visits and events working with Visit Britain and Manchester Convention Group including event support programme funding to further enhance Manchester bids/pitches for future international conferences and meet the buyer events in market
- Deliver in-bound B2B travel trade and B2C campaigns in key markets including US, China, India and EU, working with GMCA, MAG, VB and airline partners
- Deliver activity to support of new direct India route, working with Visit Britain and DIT and maximising relationship with Cricket World Cup and LCC.
- Delivery Phase 2 Discover England initiative to include:
  - 'Experience England' project in partnership with London and Partners and Visit Birmingham, targeting China, GCC and potentially India with twin city itineraries.
  - Delivery of the Phase 2 Discover England 'International Gateway' project, partnering with attractions and DMOs across the North to develop and distribute bookable product, focussing on US markets.
  - Fully integrate visitor welcome and visitor information within MAG's airport transformation and customer service programme.
  - Strengthen GM understanding of international visitor motivations and perceptions with particular focus on understanding what GM can do to improve the welcome for businesses

## **Priority 8 - Build Manchester Brand and Reputation and tell our story brilliantly.**

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- Develop property and corporate sector marketing and sponsorship plan including delivery of MIPIM and other sector project opportunities to promote GM collectively.
- Continue to develop and deliver Global Mbassador programme, ensuring diversity of GM is represented.
- Finalise GM International City to City Relationships strategy and action plan in full alignment with our international market priorities
- Develop portfolio of key international opportunities for Mayor and deputy Mayor for the next twelve months.
- Develop online GM visit platform to sell and distribute bookable product.
- Develop the GM content curation, creating and distributing content promoting key sectors to an international audience.
- Develop annual segmented content management and promotional plan

- Completion of peer city benchmarking of promotional investment and work to determine mutually beneficial international city to city relationships.
- Host annual internationalisation visitor focussed event for partners and members.
- Continue to develop international media profile of GM by delivering a media visit programme in conjunction with MAG

## 8.0 Summary

- 8.1 The eight strategic priorities of our International Strategy and the associated outcomes agreed by this Board last year continue to stand up well despite continued economic and Brexit uncertainties. Very solid progress has been made in the delivery of many of the actions set out in the Implementation Plan. Four of the priorities are on track for delivery. Four are behind schedule due to those wider circumstances beyond our control but are recoverable.
- 8.2 There is no doubt that GM fully exploited the benefits from an international tourism boost arising from favourable exchange rates and still appears to be building on this competitive advantage despite Sterling now strengthening to pre referendum levels against the dollar. However, a drop in forward bookings at a UK level points to more challenges ahead. In that context, there will be an early on research to better understand visitor expectations and behaviours so that we can differentiate our welcome offer and then deliver more inventive solutions.
- 8.3 In the short term securing commitment to inward investment projects within our lengthy pipeline is likely to continue to be challenging up to the first phase of Brexit to March 2019 and then to the final phase in December 2020. However, our performance has been encouraging despite this backdrop.
- 8.4 The medium impact of Brexit on GM international trade performance is uncertain as the exchange rate advantages reduce and future customs arrangements are in the balance. Our reliance on EU markets (58%) is of particular concern.
- 8.5 The GM Local Industrial Strategy we are preparing working with Government will be an important tool to enable us to seek to influence Government, particularly DIT thinking, and align GM priorities with those of the UK Government taking into account our particular place based strengths and opportunities post Brexit.
- 8.6 It will be important to judge the success of the final 18 months of the implementation our Internationalisation Strategy in the key areas we control e.g. key messages to international markets, our key international market priorities, new airport route, tourist visitor experience) and in the context of GM internationalisation areas where we are able to exert strong influence with Government (e.g. approaches to local trade and investment support through the Northern Powerhouse). The most significant unknown is UK Government's immigration policy which is likely to be clearer in the autumn and its impact on our ambitions to attract and retain international talent and students.

## APPENDIX A

### INTERNATIONALISATION STRATEGY – PERFORMANCE REPORT TO APRIL 2018

Operational Objective	Strategy 2020 Outcomes	Current position	Brexit Impact to on priority area to date	Outcome delivery progress
<b>IS01: Global Gateway for the UK and the North:</b> Implementation of MAG route development strategy; Accelerate north road and rail infrastructure; destination gateway for the north; strategic destination airline partnerships.	Increase the number of inbound international businesses from 1.02m to 1.31m by 2020. Increase the number of inbound international tourists from 2.91m to 3.43m by 2020.	<b>Inbound international business visitor number increased from 1.02m in 2015 to 1.491m in 2017 (+46%)</b> <b>Inbound international leisure visitors increased from 2.91 m in 2015 to 3.822m in 2017 (+31%)</b>	Positive – largely due to favourable exchange rates	Green
<b>IS02: World Centre for Trade across key GM Sectors:</b> Export orientated business culture; Intensive support to existing exporters; Fully integrated business export offer; identify gaps and weakness in international supply chains.	Improve our export performance by £900m by 2020 (from £5.35bn (2015) to £6.25bn) and narrow the gap between our actual and “expected”20 export performance by 17%.	<b>GM total exports in 2016 stood at £6.4billion, 23% of the North West total and 2% of the UK total. This represents a significant 16% rise from 2015, following 3% growth from the level in 2014 to 2015, and 0.1% growth between 2013 and 2014.</b> <b>The EU accounted for approximately 58% of exports in GM in 2016, in line with both 2014 and 2015.</b>	Mixed – Exchange rates has led to increases in manufacturing export but future uncertainty is damaging investment levels	Yellow
<b>IS03: UK Magnet for FDI</b> Exploit internal MGC operational synergies; market partnerships with private sector; strong relationship with DIT; Portfolio of international collaborative R&D opps with Universities leading to FDI; Target heads of supply chains.	Increase our proportion of UK FDI from 3.5% to 5%. This would be worth up to an additional £300m investment over the strategy period.	<b>EY’s 2018 UK Attractiveness Survey is due to be published in May and will contain an in-depth analysis of the UK’s performance in attracting FDI since the referendum vote up to the end of 2017</b>	Negative – a solid pipeline but reduced appetite to commit.	Yellow
<b>IS04: Portfolio of Prime FCI Opportunities</b> Leverage intelligence through GMSF site identification; Promotion of portfolio working with DIT: improve GM capacity to exploit FCI opportunities.	Win large scale FCI projects can be expected to enable GM to secure a minimum additional £1bn FCI during the Strategy period.	<b>The level of FCI investment projects in GM has increased significantly. With FCI China investment alone exceeding £3bn</b>	Mixed – GM benefiting from FCI arising from London stagnating property market.	Green
<b>IS05: Strengthened international research capabilities and International Talent Base</b> Development of Manchester Visa to attract international talent in key areas (digital and	Grow the international research reputations of GM universities measured through improvements in university league table rankings.	<b>Manchester University International ranking was 34<sup>th</sup> in QS Ranking in 2017 from 29<sup>th</sup> in 2016</b>	Negative – UK future participation in major EU research programmes is uncertain.	Yellow

engineering); leverage Science Audit strategic positioning; attraction of international entrepreneurs.		<b>Salford University remains in top 650 worldwide</b>  <b>MMU remains in top 800 worldwide.</b>		
<b>IS06: The best UK Destination for International Students.</b> Development of Study Manchester Platform; salary thresholds to reflect local economy; develop blended learning and foundation degrees for international students.	Our target is for 20% of students studying in Greater Manchester to be from overseas by 2020 from 15%.	<b>The proportion of international students across GM universities increased from 15% to 17% over the strategy period.</b>	Negative – International students are still included as part of UK immigration target	Yellow
<b>IS07: A World Class Visitor Hub</b> Commercially integrated visitor packages and marketing; Public/ private partnership to attract international events; Northern tourism campaign; Analysis to understand gaps in offer;	Match UK average growth (12%) by the end of the Strategy period through additional investment to implement the above Strategic enablers. This would result in additional £64m of visitor spend. (GM Growth over the period 2011-14 was 4.3%, compared to the UK average of 12%.)	<b>Visitor volume figures for 2017 are not available until Jul 2018 so a 3 yr comparator figure for 2014-17 cannot be provided, however, the GM visitor number uplift from 2013 to 2016 was 18%, which is ahead of the UK increase of 15% for the same period</b>	Positive – significant benefit from favourable exchange rates.	Green
<b>IS08: Build Manchester Brand and Reputation and tell our story brilliantly.</b> Develop GM narrative; Cross sector digital platform; develop new international networks and strategic partnerships.	We aim to measure our progress in building our international brand and reputation through a range of mechanisms including the monitoring of recognised global city indexes	<b>Our position in the Anholt index rose from 27<sup>th</sup> in 2015 to 24<sup>th</sup> in 2017.</b>	Continued good progress demonstrated through improved Anholt rating	Green

**KEY TO RAG STATUS:**



Progress ahead of or on schedule with objective achieved or likely to be achieved



Progress behind schedule but able to be recovered with good probability that objective will be achieved



Progress behind schedule with key issues impeding recovery – risk that objective will not be achieved



Progress behind schedule with recovery doubtful and objective unlikely to be achieved or ability to achieve objective impaired by factors which the Group cannot resolve

Level of activity: HIGH MED LOW	GM INTERNATIONALISATION ACTIVITIES/ THEMES & TARGET MARKETS							GM SECTOR & SUBSECTOR – TARGET MARKETS											
								FDI				TRADE		ACADEMIC					
	FDI	FCI	Trade	Academic Research	International Students.	International visits	Int. air connectivity	Manufacturing			Digital & Creative		Life Science /Health Innovation			Finance & Professional		Research specialisms	
							Advanced Materials,	Automotive transport infrastructure	Aerospace & supply chain	Food & Drink	Digital Tech, cyber security, data	Media Creative	Health Informatics/ data	Cancer Research, Genetics	Medical devices	Fin tech, financial services	Legal, shared services	Nuclear	Heat networks, smart grid, BIM
<b>PRIME MARKETS</b>																			
EU (Germany, France, Italy, Netherlands focus)																			
USA																			
<b>OPPORTUNITY MARKETS</b>																			
CHINA																			
INDIA																			
JAPAN																			
UAE																			
<b>MONITOR MARKETS</b>																			
Australia																			
Canada																			
Taiwan																			
Saudi Arabia																			
Singapore																			
South Korea																			
Malaysia																			
Mexico																			
S. Africa																			
Turkey																			
Nigeria, Brazil																			

