

Greater Manchester Combined Authority

Date: 26th September 2025

Subject: Adopting Frontier Sector Development Plans

Report of: Councillor Bev Craig, Portfolio Lead for Economy, Business & Inclusive Growth and Tom Stannard Portfolio Lead Chief Executive for Economy, Business & Inclusive Growth

Purpose of Report

To provide an update on the 5 “Frontier Sector” Development Plans for adoption as part of GM’s growth approach for the following sectors:

- Advance Materials & Advanced Manufacturing
- Digital, Cyber & AI
- Health Innovation & Life Sciences
- Low Carbon Goods & Services
- Creative Industries

Recommendations:

The GMCA is requested to:

1. Review and subject to comments, adopt the frontier sector plans
2. Note the proposed next steps with the intention for these plans to inform the Local Growth Plan Government has asked the GMCA to produce and for the plans to be refreshed annually

Contact Officers

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Jacob Morris-Davies – Principal, Sector and Cluster Development

Equalities Impact, Carbon and Sustainability Assessment:

BOLTON
BURY

MANCHESTER
OLDHAM

ROCHDALE
SALFORD

STOCKPORT
TAMESIDE

TRAFFORD
WIGAN

Recommendation - Key points for decision-makers

This assessment has been made at a high level to try and cover all the sector development plans; it has not been possible to consider every individual intervention in these plans through this process.

Impacts Questionnaire

Impact Indicator	Result	Justification/Mitigation
Equality and Inclusion		
Health	G	The Health Innovation and Life Sciences Sector Development Plan will improve health outcomes for GM residents in the long time by accelerating the development and adoption of healthcare solutions such as diagnostics, digital tools, and targeted therapies, supporting prevention, healthy ageing, and more inclusive, data-driven care if integrated into the GM healthcare system. .
Resilience and Adaptation	G	The Sector Development Plans support GM's 2038 carbon neutrality target by promoting low-carbon innovation, sustainable manufacturing, and green infrastructure investment across key sectors. In turn there will be spillover benefits for the residence of GM from the innovation this support to resilience in GM.
Housing		
Economy	G	The Frontier Sector Development Plans will support Greater Manchester's economy by supporting the creation of value jobs, attracting investment, and strengthening the region's innovation ecosystem. The plans will support the creation and retention of 'good jobs' with clear pathways for progression, while helping local businesses commercialise innovation, access new markets, and scale. The plans will also enhance Greater Manchester's position as a national leader in R&D and translational innovation.
Mobility and Connectivity	G	The Sector Development Plan will improve mobility and connectivity in Greater Manchester by supporting key infrastructure such as the Northern Gateway access road to unlock Atom Valley, while also enabling innovation in connected and autonomous vehicle technologies through advanced manufacturing capabilities.
Carbon, Nature and Environment	G	The Sector Development Plans support GM's 2038 carbon neutrality target by promoting low-carbon innovation, sustainable manufacturing, and green infrastructure investment across key sectors.
Consumption and Production		
Contribution to achieving the GM Carbon Neutral 2038 target		The Sector Development Plans support Greater Manchester's 2038 carbon neutrality target by promoting sustainable manufacturing practices, low-carbon innovation, and green infrastructure investment.

Further Assessment(s): Carbon Assessment

G	Positive impacts overall, whether long or short term.	A	Mix of positive and negative impacts. Trade-offs to consider.	R	Mostly negative, with at least one positive aspect. Trade-offs to consider.	RR	Negative impacts overall.
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Risk Management

N/A

Legal Considerations

N/a

Financial Consequences – Revenue

There are no direct financial consequences arising from this report. The Sector Development Plans and priorities contained within in will however be used to inform future funding decisions.

Financial Consequences – Capital

There are no direct financial consequences arising from this report. The Sector Development Plans and priorities contained within in will however be used to inform future funding decisions.

Number of attachments to the report: *6X Annexes (The 5 Sector Development Plans and An Introductory Document)*

- A. Advanced Materials & Advanced Manufacturing
- B. Creative Industries
- C. Digital, Cyber & AI
- D. Health Innovation & Life Sciences
- E. Low Carbon Goods & Services
- F. Introductory Document

Background Papers

Tracking/ Process [All sections to be completed]

Does this report relate to a major strategic decision, as set out in the GMCA Constitution

Yes

Exemption from call in

No

Bee Network Committee

N/A

Overview and Scrutiny Committee

N/A

1. Introduction and Background

- 1.1 The Greater Manchester Strategy (GMS) sets out a collective vision for the next decade to see a thriving city region where everyone can live a good life.
- 1.2 It recognises that Greater Manchester will only be successful if every area of the city region and all its people are successful. It therefore sets out a blueprint to unlock a new form of economic growth where no one is left behind that creates the conditions for people and businesses to flourish.
- 1.3 The GMS will build on Greater Manchester's track record of achievement and use the tools provided by devolution to unlock a new form of inclusive economic growth. With the right backing from Government, we can deliver the next decade of success for all parts of the city-region.
- 1.4 This vision will be achieved by focusing on two interlocking areas: growing the economy and making sure all our people can live well. The plans for growth and our people are designed to fix the foundations of life - shelter, safety, mobility, opportunity and support - within a framework of ambitious commitments.
- 1.5 With all partners working together, there is a once in a generation opportunity to tackle spatial, demographic and socio-economic inequalities, secure a greener future and create opportunities for everyone to live well.

2. Growing Our Economy

- 2.1 The city-region is a leader in life sciences and health innovation with the largest concentration of research excellence outside the Golden Triangle (the life sciences cluster covering London, Oxford and Cambridge). It has internationally recognised strengths in low carbon & net zero technology, advanced materials & manufacturing and is home to the fastest growing digital and tech hub in the UK with the largest AI cluster in the country. Greater Manchester also has a dynamic cultural economy and is a centre for finance, professional and business services with the most significant sectoral focus outside London.
- 2.2 Our international reputation and proven growth performance has continued to attract talent and investment from around the world, and in the decade since devolution, the city-region has become the UK's fastest growing economy with productivity growth outpacing the national average. This year - for the first time - Greater Manchester's economy is valued at over £100bn.

- 2.3 However, challenges remain with this rapid growth not being shared equally across the ten boroughs or industries, and with constraints on growth potentially putting a brake on future prosperity.
- 2.4 The GMS sets out an approach to growth which looks to address these challenges by:
- **Focusing on our growth driving sectors through Sector Development Plans** providing strategic direction, identifying intervention priorities and attracting investment.
 - Taking advantage of the opportunities provided in reaching our target of becoming a carbon neutral city region by 2038.
 - Improving infrastructure and transport for better access to housing and employment for residents across the city region.
 - Increasing the skills base and supporting residents to enable residents to rejoin or increase participation in the workforce and better employment opportunities.
 - Strengthening the city-region's innovation ecosystem to support businesses growth and increase innovation.
 - Providing new neighbourhoods with thousands of new homes built around major employment sites so that residents can easily access opportunities.
 - Supporting more businesses to start up, scale up and build resilience
 - Building global partnerships helping local companies engage in new markets and attract new FDI.
 - Ensuring growth provides good jobs by working with employers to improve standards through the Good Employment Charter.
- 2.5 The GMS seeks to capitalise on the city-region's growth opportunities, the central element of this being the **Integrated Pipeline** which brings together interventions in a holistic manner, sequencing development in a way that extracts maximum value.
- 2.6 The Pipeline will unlock land and attract £10 billion in investment over the next decade, paving the way for the private sector to create new homes, jobs and industrial and commercial spaces. It will spearhead a new way of delivering regeneration, building on a scale and at a pace not seen before this century to create nationally significant and globally connected economic clusters supported by transport links in our growth sectors.
- 2.7 The Sector Development Plans that are the subject of this report will be a crucial part of how GMCA will link the physical development of the city-region with business growth and investment – the actions they contain will help to ensure GM has a growing base

of businesses—both start-ups and existing businesses -that are innovating, expanding and creating new jobs that will meet the supply of new spaces.

- 2.8 The plans include data on how our growth sectors are currently spread across the city-region, the links made so far to the developing opportunities in our growth locations, and actions relating to planning and development. These particular elements of the plans will be kept under continuous review as the Integrated Pipeline moves forwards and opportunities continue to be refined and developed.

3. Greater Manchester's Growth Driving Sectors

- 3.1 The groundbreaking GM Local Industrial Strategy was launched in 2019 and identified four innovative globally significant 'frontier sectors' informed by the GM 'Independent Prosperity Review'¹ and GM and Cheshire East 'Science and Innovation Audit'² including Health Innovation; Advanced Materials and Manufacturing; Digital & Creative; and Clean Growth.
- 3.2 These sectors contain multiple clusters where technologies, assets and businesses combine in a place, creating potential for innovation and creation of new markets or knowledge that increases the value being created in the cluster and the competitiveness of the wider sector in the region.
- 3.3 Despite changes in the national policy landscape since the GM Local Industrial Strategy, Greater Manchester has maintained the frontier sectors as an economic policy priority, which was re-affirmed in the refresh of the GMS.
- 3.4 In 2025, the government launched the National Industrial Strategy, identifying eight priority sectors—five of which, albeit with slight definitional differences, align closely with our frontier sectors. Greater Manchester was also identified itself - or as part of a wider geography - as a "priority place" for each of these sectors.
- 3.5 Bespoke **Sector Development Plans** (SDPs) have now been developed for GM's 5 original frontier sectors, or 'growth sectors' as they are referred to in the national Industrial Strategy. They have been developed in consultation with key stakeholders through targeted workshops and ongoing dialogue with sector bodies, local authorities, businesses, institutions, sector forums and relevant GMCA stakeholder groups and boards.

¹ [GMCA, Greater Manchester Independent Prosperity Review \(2019\)](#)

² [GMCA, Cheshire East and Gm Science and Innovation Audit \(2016\)](#)

- 3.6 This process has ensured that the plans reflect sector-specific priorities, challenges and opportunities, and are grounded in real-world insight and we will work to ensure that business engagement continues to feed into new iterations of these plans going forwards.

4. The Purpose of the Plans

- 4.1 The Sector Development Plans seek to tether our growth or frontier sectors to the city-region's growth approach set out in the GMS by bringing together an up-to-date understanding of what is needed to maximise their development as key growth opportunities for Greater Manchester's economy.
- 4.2 Specifically the plans are designed to:
- **Provide strategic direction** for GMCA, local partners, institutions and businesses to work towards the development of each of Greater Manchester's Frontier Sectors, including shaping thinking regarding future funding utilisation.
 - The Plans will be "**living documents**" that will have an iterative approach to how they are written and implemented.
 - **Identify intervention priorities** which the evidence suggests will support the development of the sector including areas such as physical developments, skills, business support, research and innovation programmes, or non-financial sector development initiatives and partnership models.
 - **Provide an updated understanding** of the state of our frontier sectors including current and planned activity that is taking place within them, which were last reviewed as part of the Local Industrial Strategy process.
 - Support the development of the **Local Growth Plan** and the National Industrial Strategy and its "Sector Plans".
 - Map out **key inter regional partnerships and supply chain dependencies** and links to national and international initiatives.
- 4.3 In addition, the plans will form key priorities in the GM Local Growth Plan. Government announced the requirement for Mayoral Strategic Authorities to develop Local Growth Plans in summer 2024 as a local response to the National Industrial Strategy and growth mission. Government guidance on the content of Local Growth Plans includes growth opportunities linked to the sectors identified in the National Industrial Strategy – which are aligned with GM's frontier/growth sectors.

- 4.4 The process to develop GM's Local Growth Plan is underway and the plan will be brought to the GMCA for consideration in Autumn 2025.

5. The Integrated Pipeline

- 5.1 As set out above, the Sector Development Plans will be delivered as part of Greater Manchester's Integrated Pipeline. The Pipeline will target investment at **six growth locations – nationally significant sites with land earmarked and shovel-ready** - using the greater flexibility over finances agreed in the integrated settlement devolution deal to act as an enabler, attracting private investment, unlocking land and paving the way for the private sector to deliver.
- 5.2 Each of the plans includes information on the potential for the sector in focus to support the realisation of the opportunities and vision for each Growth Location. This includes the links to new game-changing innovation districts and research and development assets, manufacturing and industrial and commercial space and hubs for entrepreneurship. Examples of these spaces include innovation districts at Oxford Road Corridor, Crescent Salford and the Health Innovation Campus at Royal Bolton Hospital and to larger sites like Atom Valley - the North West's largest development site focused on high-value R&D and manufacturing.
- 5.3 The plans contain some insights from businesses in these sectors in relation to their physical development requirements. We will continue to build further intelligence on this via our ongoing sector engagement and future analytical work.
- 5.4 It should be noted that the 5 sectors that we have developed plans for so far do not represent the entirety of the growth opportunities in GM and that the actions they contain will not be pursued to the exclusion of supporting other industries and investment opportunities that lead to good jobs, growing businesses and thriving enterprise across the city-region. GMCA officers are also actively considering if the approach in these plans should be applied to other important sectors.

6. Development and Delivery

- 6.1 Within the overarching framework of the Integrated pipeline, principles have been developed for how the Sector Development Plans will work and continue to work in the future as new iterations are developed as outlined below:
- They are living documents that will have an iterative approach to how they are written and implemented. As befits these sectors which are rooted in new

development and innovation, the plans cannot be set in stone or they will rapidly become irrelevant.

- Business engagement will continue to be central to this approach with the plans being co-designed with the sector from vision, through to strategic priorities and delivery interventions. We will continue to strengthen our sectoral engagement as future iterations of these plans are developed.
- Where possible, actions will focus on impact and outcomes, and realistic timescales, rather than the delivery of blunt outcomes to arbitrary, short deadlines.
- Governance and oversight will be proportionate, flexible and responsive, rather than imposing rigidity, bureaucracy and excessive reporting requirements.
- We will ensure that different parts of the ecosystem work together and that various interventions complement and support one another.

7. Content and Delivery Framework

7.1 Each plan follows a shared framework and structure that has been developed in response to a best practice review in sector development commissioned by GMCA in 2023 as outlined below:

Strategic Context	Current State of the Sector	Ambitions For Growth	What We Need to do to Achieve Growth	How We Will Measure Success
• Connections to other frontier sectors • Alignment to other strategies (inc National Industrial Strategy) • Wider Context • Growth Locations & Investment Plan	• Sector size, features & distribution • Sub-sectors and comparative advantage • Research & Innovation Assets • Flagship programmes and infrastructure • Swot Analysis	• Vision for the sector in GM • Strategic Priorities	• Our approach to delivery • Levers for Growth • Delivery Plan	• Measures • Impacts

- 7.2 Each plan contains a series of actions to support sector development.
- 7.3 To ensure a common approach across the plans, enabling the opportunities for joint-working and knowledge sharing, we have developed an approach to delivery around 5 key “Levers of Growth”, which are summarised below.
- Sector Leadership - through collaboration between political, business, and research partners to shape a shared vision and communicate this.
 - Development Planning and Infrastructure - unlocking growth by increasing space for business, innovation and the supporting infrastructure needed for growth.
 - Innovation and Research – driving productivity by fostering R&D clusters that support commercialisation and translational research.
 - Enterprise and Business Support – promoting a place-based support model to strengthen businesses and improve access to innovation and growth services.
 - Skills and Labour Supply – maximising opportunities to of developed powers to align skills provision with employer needs to growth sectors.

8. Next Steps

- 8.1 Subject to their adoption by GMCA, the key priorities in these plans will be integrated into the GM Local Growth Plan which will be developed over the Autumn.
- 8.2 As well as meeting the content and other requirements set out by Government, the Local Growth Plan will be designed to support work with Government to deliver the growth ambitions in the Greater Manchester Strategy and to link to our local sector development activity with the work Government and its agencies are doing to deliver the National Industrial Strategy.
- 8.3 Further work will also be undertaken as part of the development of the Integrated Pipeline to clarify the spatial aspects of both the Sector Development Plans and the GM Local Growth Plan.
- 8.4 Subsequently, processes will be implemented to track the delivery of actions outlined in the action plans for each Sector Development Plan.
- 8.5 These action plans will be refreshed on an annual basis in dialogue with partners, stakeholders and industry.