BISER

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Benchmarking the Information Society:
e-Europe Indicators for European Regions

BISER – Workpackage 6:
e-Europe Regions Domain Reporting

Regional Portrait of Greater Manchester

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Authors:	Local Futures Group
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NUTS 2 Regions in the UK

1 The NUTS nomenclature in the UK – background and current structure

The UK governance structure, traditionally centralised, has recently started to devolve powers to the regional level. This is most clear with the creation of elected Regional Assemblies in England and the Welsh and Scottish Regional Parliaments Local Government in the UK has a two-fold structure: Scotland, Wales, Northern Ireland and parts of England have single-tier, 'all-purpose' councils with responsibilities for all local authority functions. The rest of England, mainly the rural areas, has a local two-tier governance system, comprising district and county councils. In total, there are 464 councils in England and Wales.

- **National level (NUTS 0):** The national government plays a dominant role in the division of power and functions. It has sole legislative powers in respect of all key functions and has sole responsibility for monetary and fiscal policy. The Scottish Parliament has primary, and the Welsh Assembly secondary legislative powers in some areas]

- **Government Office regions and countries (NUTS 1):** At NUTS 1 level there are 9 Government Office Regions in England. Wales, Scotland and Northern Ireland have the status of countries with independent regional assemblies or parliaments set up in 1999, some powers have been transferred to them that were previously held by the UK national Government in Westminster.

- **Counties (NUTS 2):** At NUTS 2 level, there are 30 counties in England, plus Inner and Outer London, 2 in Wales, 4 in Scotland and 1 in Northern Ireland. Whereas the administrative counties of England and the counties and county boroughs of Wales have statutory and administrative powers, there are other areas throughout the United Kingdom that are called counties but lack administrative power. 'In England, metropolitan county councils covering the six main urban agglomerations outside London were created in 1974, thirteen years after a similar arrangement was made for London All of these city-regional authorities were abolished in 1986, after which their functions were divided between lower tier local authorities, indirectly elected joint boards and Government departments or agencies. A strategic authority for London was recreated in 2001.']

- **Upper tier authorities or groups of lower tier authorities (unitary authorities or districts, NUTS 3) and lower tier authorities (districts) or individual unitary authorities (NUTS 4):** The local authorities are responsible for the provision of a wide range of services. In two-tier areas, county councils and district councils work together. The county council usually provides core services, such as education and social services. The district is responsible for more local services, such as tourism, environmental health and housing. Councils in single tier areas are responsible for providing all local authority services in the area.

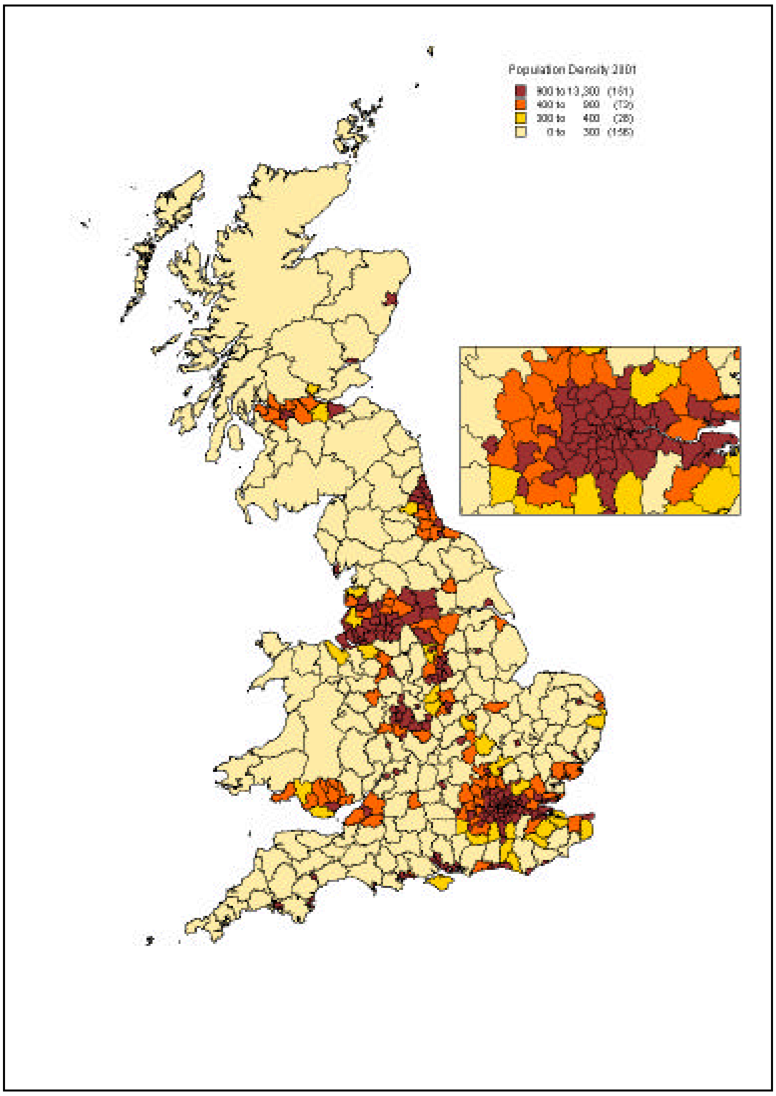
- **Wards (NUTS 5):** At the lowest geographical level and sitting below the authorities described above are 11,095 wards across the UK with limited service-delivery responsibilities. Wards are not covered by separate statutory authorities, even though some local authorities devolve selective decision-making and budgeting to ward level structures.

- **Neighbourhoods:** neighbourhood renewal and urban policy in the UK has recently drawn attention to the importance of neighbourhoods as a geographic reference point. However, there are no government powers or bodies at this level.

2 The spatial structure of the UK

The United Kingdom comprises the countries of England, Scotland, Wales and Northern Ireland. In 2001, Great Britain's (England, Scotland and Wales) population was estimated at over 58 million. Its overall population density is one of the highest in the world. Britain has a rather centralised settlement structure. The majority of the population lives in England's prosperous and fertile southeast and is predominantly urban and suburban, with nearly 7.2 million in the capital of London. The English constitute more than 80% of the nation's inhabitants. The Scottish make up nearly 10%, and there are smaller groups of Irish and Welsh descent.

Map1: Population Density in Britain, 2001



Source: The Local Futures Group, derived from ONS data

The main industrial and commercial areas are the great conurbations, where about one third of the country's population lives. The administrative and financial centres reside in Greater London, which also houses various manufacturing industries. London is Europe's foremost financial capital.

Qualitative Description of the Greater Manchester region

3 Basic facts

	Region (NUTS2)	Country (NUTS0)	EU
	Greater Manchester	UK	EU15 average
GDP [€ in PPP per inhabitant (1999)]	19,259.8	21,826.1	22,576.4
Area [km²]	1,307.7	244,820	3,191,119.9
Population absolute (1998)	2,574,700	59,789,194	375,812,900
Population density [inhabitants/km² (1998)]	2004.4	242.4	117.8

4 Map

5 Regional structure

5.1 Spatial structure

- The NUTS 2 region of Greater Manchester is situated in the North West region (NUTS 1) of England. The North West borders Scotland in the north and Wales and the West Midlands in the south. It is comprised primarily of large rural areas in the north and urban areas in the South.
- Greater Manchester is in the south-eastern part of the North West and comprises two NUTS 3 regions (Greater Manchester North and Greater Manchester South) and a dense network of ten metropolitan boroughs including the city of Manchester.
- The Greater Manchester conurbation has a population of nearly 2.6 million, which represents almost two-fifths of the North West's total population - the second largest conurbation in the UK.
- The city of Manchester houses several of the North West's regional and administrative functions as well as many high level financial and business services. Other key features are the concentration of arts, higher education and cultural facilities.

5.2 Infrastructure

Greater Manchester was one of the birthplaces of the industrial revolution, which has provided it with important transport links for both road and rail north/south and east/west. It is also an important distribution centre. Manchester Airport is the UK's busiest airport outside London. It is currently being expanded, with a second runway generating construction of new hotels, additional related industries, etc.

Many of the growth sectors in the regional economy depend on ease of access to Manchester, internationally and nationally. Key developments are the West Coast rail upgrade, the expansion of Manchester Airport and additions to Metrolink, the UK's first modern light rail/tram system.

5.3 Population structure / migration (demography)

Greater Manchester is a multicultural agglomeration with a significant ethnic minority population comprising 8.49% of the population. In the city of Manchester itself the figure rises to 19.04%, followed by the districts of Oldham, Rochdale and Bolton.

The huge catchment population within Greater Manchester, in terms of human resources and purchasing power, is of great interest to manufacturing, inward investment and new service operations.

The age structure is relatively young with the Greater Manchester population ranking 11th youngest amongst the 53 sub-regions in Great Britain. Within Greater Manchester, the population is youngest in Manchester city, followed again by the districts of Rochdale, Oldham and Bolton.

Between 1991 and 2001, all but two districts of Greater Manchester experienced a decline in population. This decline grew as high as 9% in the city of Manchester, which is one of the largest losses in Great Britain.

6 Economic factors

6.1 Economic development in the last decade

Greater Manchester is a modern region with strong roots in the industrial past. Manchester used to be at the forefront of manufacturing. Remnants of this past are still apparent today, represented by former textile mills in the city centre. The region and its population were hit hard by the decline of these traditional sectors and economic and industrial restructuring has come a long way.

Although Manchester is still home to a number of successful heavy industry companies, it has been at the forefront of the development of the regional knowledge economy and has a range of successful sectors from professions like banking, accounting and law, new media and e-commerce.

6.2 Sectors

Beyond the city of Manchester, Greater Manchester has cotton and synthetic textiles, coal, and chemical industries and is also a transport and warehousing centre.

The region was traditionally strong in the manufacturing and textiles industries and these sectors still play an important part in the local economy. However, other sectors like financial and business services are becoming increasingly important.

Manchester has proved a popular location for call centres employing large numbers of people. Some of the major firms who have chosen to site their contact centres in Manchester include British Airways, Cable & Wireless and Direct Line Insurance. The fast developing biotechnology sector is also well represented.

Due to the heavily urbanised structure of this metropolitan region, the agricultural sector plays only a minor role. Greater Manchester ranks within the bottom third in Britain for employment in agriculture.

6.2.1 Focus: Media and creative industries

The Manchester city region has the nation’s largest concentration of employment in the media and creative industries outside London. Historically Manchester has a high concentration of technological expertise in computing and related information technologies. The region also has a strong tradition in the traditional print industry and broadcasting with Granada TV and the BBC’s northern base located in Manchester.

Another contributing factor for the development of the media and creative industries is the diverse and dynamic cultural, economic and social base of the region, which provided the base for new developments, particularly in the music industry. Manchester is the only regional city that sustains a local popular music industry with many small independent labels; the city has an established niche market in product design and a growing reputation in fashion.

These sectors are now supported by the establishment of the Cultural Industries Development Service as a national example for good practice in support and investment for the sector.

6.2.2 Focus: Sports

Greater Manchester and the North West have a competitive advantage over other UK regions in sports-related industries: the region is home to Manchester United and seven other professional football clubs, of which two, (Manchester City and Bolton Wanderers) are currently in the Premiership together with Manchester United. This has given Manchester world-wide recognition and the North West accounts for about one third of the economic turnover of the Premier League. Also, three of the major industry leaders in sports clothing and equipment are located in Greater Manchester.

International-standard sporting facilities such as Old Trafford (England's largest international standard football club ground) have been boosted with the provision of the Sportcity complex (including the City of Manchester Stadium, the focus for the 2002 Commonwealth Games), the Aquatics Centre and the Manchester Velodrome. Other significant sports complexes include the Reebok Stadium in Bolton and Robin Park/JJB Stadium in Wigan. Other well-represented spectator sports in the Manchester area are rugby, cricket and ice hockey.

6.2.3 Companies of international importance

Other large local employers in the industrial sector include the travel firm Airtours and the home shopping groups N Brown and Great Universal. The head offices of the Co-operative Bank, Insurance and Wholesale Society are still based in Manchester, the original home of the retail consumer co-operative movement first started back in 1863 and now employs over 70,000 people nationally.

6.3 Unemployment

Economic restructuring had a major impact on Greater Manchester as one of Britain's major industrial areas. Despite the regeneration of the city centre, Manchester still experiences high levels of social deprivation.

The ILO unemployment rate for 2001/2002 shows a rate of 9.25% for the city rising even higher in the most deprived wards. To address the problem of the concentration of poorer households in the older housing areas surrounding the city centre, Manchester and Salford City Councils, in particular, have developed a number of regeneration initiatives, in partnership with local agencies, the voluntary, public and private sectors and the local communities, to improve housing and promote economic regeneration.

6.4 Innovation

The research bases of the four Greater Manchester universities, several colleges and other institutions involved in research combined with commercial opportunities makes Manchester a base for a number of key players in the bio, pharmaceutical and chemical industries including Avecia and Tepnel Life Sciences. Manchester has embraced e-commerce and ICT and is represented locally by computer companies like Sharp Electronics, ICL and Fujitsu.

7 Soft factors

7.1 Housing

Housing in Greater Manchester is relatively affordable but there is enormous variation. Some of the homes in southern Greater Manchester suburbs, particularly in Stockport and Trafford, bear comparison with London in terms of price whilst other areas, e.g. in east Manchester and central Salford, have experienced collapses in market values. Increasing numbers of people live in the centre, which is undergoing extensive re-developments of former warehousing and industrial sites into apartments. As well as reclaiming industrial and brown field sites, property developers are also constructing new buildings. New city centre homes tend to be dominated by dual-income, childless, professional households. The city is less attractive to the more affluent family households who tend to locate in outlying areas of Greater Manchester or beyond (e.g. in Cheshire, in the NW, or even beyond, in the Yorkshire and the Humber and East Midlands regions]

7.2 Culture

Greater Manchester clearly is the economic hub of the North West region and historically played a major role in global trade (especially in the textiles sector). With several Universities it is also a centre of academic research and science and innovation.

The city has a history of cultural innovation with the foundation of the UK's first public library, the first professional orchestra and the first repertory theatre. Manchester has become internationally renowned in popular culture: television, music and football and offers a rich diversity of amenities in sport, arts and entertainment.

7.3 Regional image

During the 20th century the industries central to former economic success went into decline and this has left a legacy of environmental dereliction, social deprivation and economic disadvantage. Today, the Greater Manchester region has developed a new confidence through continuous economic and environmental transformation. Culture has been a major aspect to this regeneration.

The 2002 Commonwealth Games in the city provided a major opportunity to renew the cultural infrastructure. Sports facilities and cultural amenities have expanded, and visitor attractions and public spaces were (re-) created.

Greater Manchester's profile as a young, modern and culturally diverse metropolitan region is clearly on the rise. However, together with the North West region as a whole, it needs to become more strongly acknowledged as a strategically important part of the UK, and present a coherent regional image to the outside world.

8 BISER survey results on Greater Manchester

The following will provide an exemplary insight into the BISER survey data, in order to give an overview on how the *Group of Counties* Greater Manchester performs regarding key Information Society indicators. By necessity this has been kept brief.

8.1 Methodology

There are 211 European regions at the NUTS 2 (Nomenclature des unités territoriales statistiques) level and clearly a project like BISER cannot carry out surveys in each of these regions since accuracy of the resulting metrics requires a minimum number of observations. Within the limits of budget, it was decided to select 28 out of 211. The regions cover the range of patterns of sectoral structure ("agricultural", "manufacturing" and "services", depending on the share of employment in each of the sectors) and economic power (as GDP per head) as well as Member States according to the distribution of population.

Regions which were surveyed are: Salzburg (Austria), Liége (Belgium), Fyns Amt (Denmark), Väli-Suomi (Finland), Ile de France, Brittany, Nord-Pas-De-Calais, Languedoc-Roussillon (all France), Darmstadt, Stuttgart, Braunschweig, Magdeburg, Mecklenburg-Vorpommern (all Germany), Kentriki Makedonia (Greece), Border, Midland & Western (Ireland), Sicilia, Lazio, Toscana, Lombardia (all Italy), Friesland (Netherlands), Lisboa & Vale do Tejo (Portugal), Castilla- Leon, Cataluna (both Spain), Smaaland Med Oerna (Sweden), Berkshire, Buckinghamshire and Oxfordshire, Leicestershire, Greater Manchester, and Tees Valley and Durham (all U.K.).

Within each region the sample was set up as a random probability sample which provides a sufficiently representative picture of the resident population (aged 15+) and of the region's business establishments. For the population survey (RPS), a minimum of 400 successful interviews were conducted in each region; in the establishment survey (RDMS) the sample was at least 300 per region.

Computer Aided Telephone Interviewing (CATI) was used. Telephone interviews offer the advantage of quick and reliable data collection from a central telephone unit. For general population surveys in former times there have been doubts about accuracy of randomisation but recent developments in sampling practices can provide for real probability samples even with rather poor list sources and the growing fractions of non-pub numbers – the shortcoming being that a very small number of households without telephone are not included. CATI also offers best field control, automated sample administration, simultaneous data entry and permits a complex branching of the interview flow depending on filter questions and thus allows to apply questions tailored e.g. to the respondent's experiences with ICT, a firm's equipment status etc.

The population survey provided a person sample (rather than a household sample) and was predominantly based on random dialling methods. Sampling in each Member States was carried out allowing for national differences regarding organisation of telephone number allocation and unlisted telephone numbers, and taking other national peculiarities into account which may require various strategies of random drawing.

The establishment sample included establishments (and thus covered also branch offices and not only autonomous enterprises) from different industries across all economic activities but excluded establishments with less than 5 employees. Sampling was managed as a stratified approach, i.e. done separately for groups of establishments conforming with certain criteria, in order to guarantee a sample representative of the industrial structure and employment size distribution in each region. The establishment sample was drawn from the best existing source lists available, either provided by public authorities or by specialised address brokers.

Readers are reminded that survey results are estimates, the accuracy of which, everything being equal, depends on the sample size and on the observed percentage. With samples of about 300 and 400 interviews respectively, the real percentages vary within the following confidence intervals:

Observed percentages	10%	20%	30%	40%	50%	60%	70%	80%	90%
Confidence intervals if n=300	6.4% - 15.4%	14.7% - 26.6%	23.7% - 37.2%	33.0% - 47.4%	42.6% - 57.4%	52.6% - 67.0%	62.8% - 76.3%	73.4% - 85.3%	84.6% - 93.6%
Confidence intervals if n=400	7.1% - 13.9%	15.9% - 24.9%	25.1% - 35.4%	34.6% - 45.6%	44.4% - 55.6%	54.4% - 65.4%	64.6% - 74.9%	75.1% - 84.1%	86.1% - 92.9%

8.2 Selected survey results

This section presents relative performance of the Greater Manchester region compared to the average across all 28 BISER regions. The BISER average is not representative for the whole of the EU territory in a statistical sense. However, it has been checked that the sample is very similar to the EU with regard to average values for key socio-demographic and business sector variables, respectively.

Section 8.2.1 shows the results of the regional population survey (RPS), followed by the establishment survey (RDMS) in section 8.2.2. The first part of each sub-section contains a table with detailed indicator descriptions. This is followed by two charts that present the regional performance relative to the BISER EU average as well as in total values. The charts are accompanied by brief interpretations of the results within the regional context.

8.2.1 Population

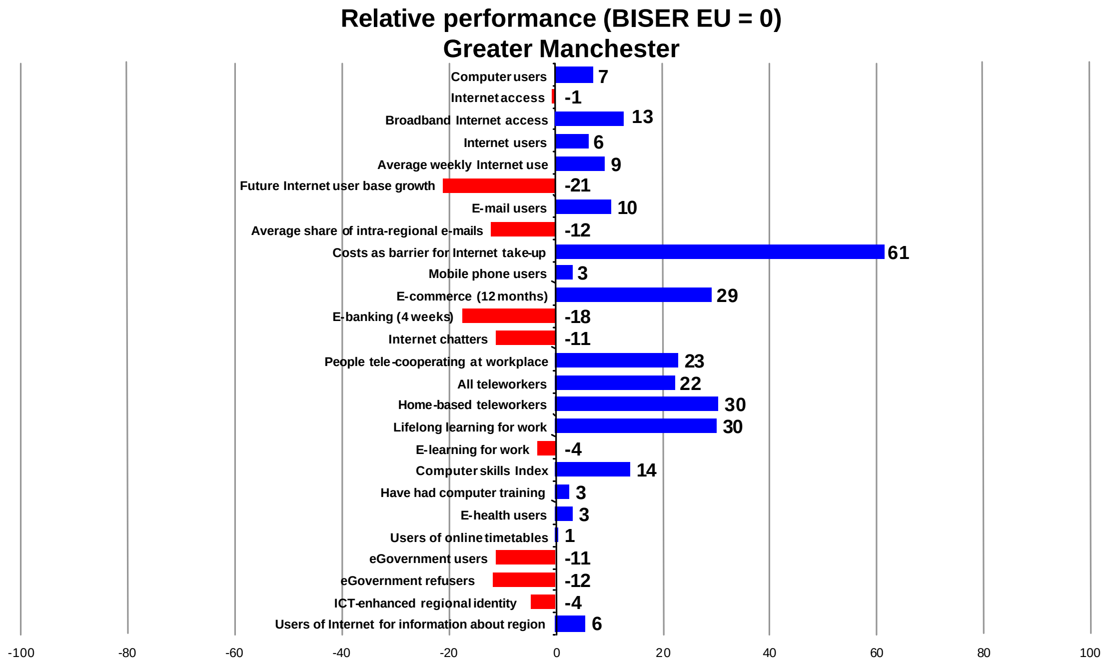
Indicator description (RPS)

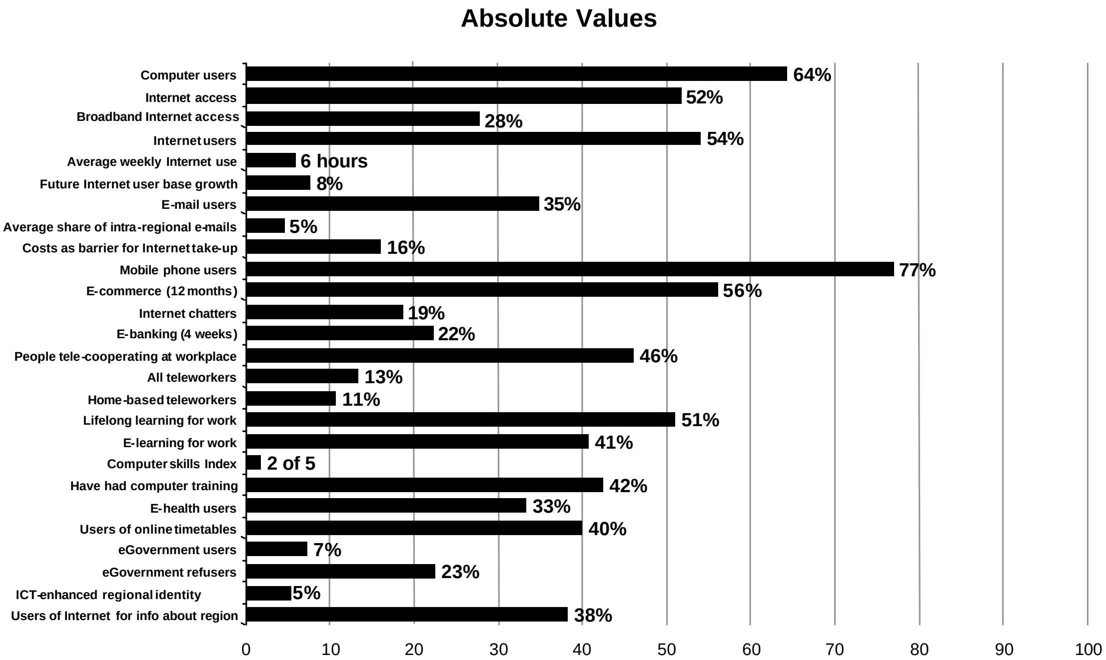
Area	Indicators	Definition	Base
Access and basic usage	Computer users	Persons who have used a computer in the last four weeks	Total population 15+
	Internet access	Persons who have access to the Internet in their home	Total population 15+
	Broadband Internet access	Persons who have access to the Internet at home via DSL or cable.	Persons with access to the Internet at home
	Internet users	Persons who have used the Internet in the last four weeks	Total population 15+
	Average weekly Internet use	Average time spent using the Internet (hours per week)	Internet users (4 weeks), excluding DK
	Future Internet user base growth	Non-users who think it is likely they will use the Internet in the future	Total population 15+
	E-mail users	Persons who have sent at least one e-mail (for private purposes) in the week prior to survey	Total population 15+
	Average share of regional mails	Average percentage of e-mail partners located in the same NUTS 2 region	E-mail users (last week, for private purposes)
	Costs a barrier to Internet take-up*	Involved non-users who agree completely that the Internet is too expensive to use	Involved Internet non-users
	Mobile phone users	Persons who have a mobile phone for their own personal use	Total population 15+
Standard applications	E-commerce (12 months)	Persons who have used the Internet to order products or services in the last 12 months	Internet users (12 months)
	E-banking (4 weeks)	Persons who have used the Internet to conduct on line banking in the last 4 weeks	Internet users (12 months)

Indicator description (RPS)

Area	Indicators	Definition	Base
	Internet chatters	Persons who have used the Internet to conduct online forum in the last 4 weeks	Internet users (12 months)
Work organisation	People tele-cooperating at workplace	Use of e-mail or other electronic data transfer for co-operation with clients, customers, suppliers or other working partners at other locations	Total employment
	All teleworkers	Multi-locational workers who spend paid working time doing home-based telework or mobile telework	Total employment
	Home-based teleworkers	Persons who spend paid working time working at home or on the same grounds or buildings as their home, and are using a connection to the Internet or their company's computer system while doing so	Total employment
Learning and skills	Lifelong learning for work	Persons in paid employment who have been involved either work related training by their company or by training organisation or in self-directed work related learning in the 4 weeks prior to the survey	Total labour force incl. temporarily not working (unemployed)
	E-learning for work	Persons engaged in lifelong learning who have used e-learning	All respondents engaged in lifelong learning in the 4 weeks prior to the survey
	Computer skills index	Average number of computer skills (out of a list of 5 of increasing sophistication) in the population	Total population 15+
	Have had computer training	Persons who have once attended a computer training course lasting at least half a day in total	Total population 15+
Special applications	E-health users	Internet users who have searched for any health-related information on the Internet in the 12 months prior to the interview	Internet users (12 months)
	Users of online timetables	Percentage of Internet users who have used the Internet to get any timetable information in the 4 weeks prior to the survey	Internet users (12 months)
	eGovernment users	Persons who have used the Internet for receiving at least one of three typical services provided by government/ public administration in the 12 months prior to the survey	All persons who have carried out at least one of these three typical services provided by government/ public administration in the 12 months prior to the survey. Non Internet-users excluded.
	eGovernment refusers*	Persons who agree completely that eGovernment is nothing they are interested in	Internet users (12 months)
Region-specific usage	ICT-enhanced regional identity	Percentage of respondents who state that the Internet and e-mail have given them a greater sense of identity with the region in which they live	Total population 15+
	Users of Internet for information about region	Percentage of Internet users who have got news about region from the Internet	Internet users (12 months)

* = scale inverted in figure below





Note: In the upper figure (relative performance), the scale has been inverted for indicators where high values are considered negative (see table). This means that if the bar is blue and pointing towards the right for "costs as a barrier for Internet take-up", for example, this means that in this region below average shares of respondents were affected by costs as a barrier.

In the Greater Manchester region the general access and usage of ICT and the Internet are higher than the EU averages. The proportion of broadband Internet access is the highest amongst all four UK regions that are represented in the BISER survey. This is likely due to the urban character of Greater Manchester. Similarly to the other UK regions, the future demand for Internet usage remains relatively low at 8% - 21% below the EU average. The cost of using the Internet are considered as a barrier to up-take by 16% of the population, which is less than the EU average but highest amongst the four UK regions.

Regarding the use of online services, e-commerce scores high while other applications such as online banking, discussion fora and e-Government services are used less than on average in the surveyed BISER EU regions. The proportion of teleworkers stands at over 13% and there are 30% more home-based teleworkers in Greater Manchester than on the BISER EU average.

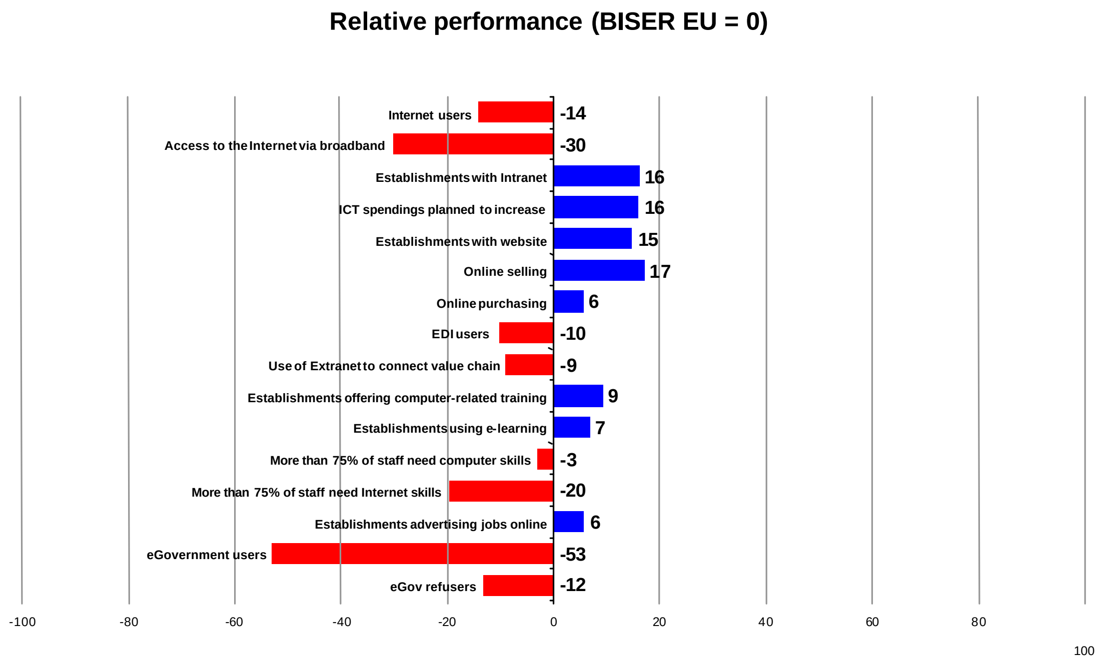
Skills development clearly is important in the region. 51% of the population have recently been involved with work related training and 41% undertaking e-learning for work purposes.

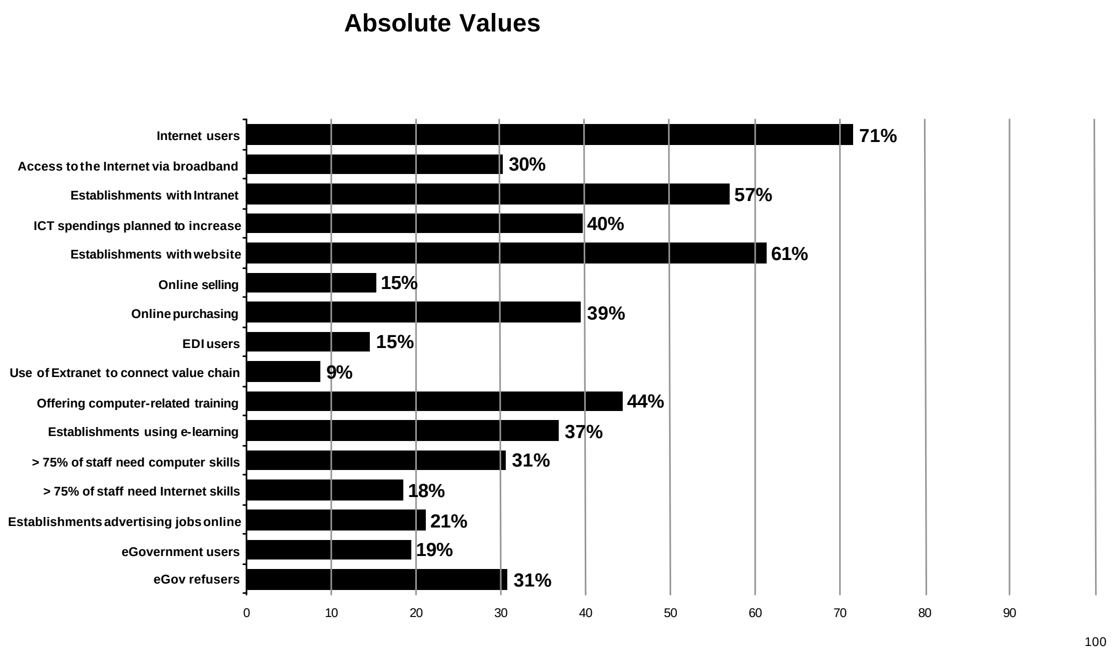
E-Government usage appears to be very low. Only 7% of surveyed respondents have used public services online in the past 12 months and 27% of Internet users are not interested in e-Government. Both of these values are greater than 10% below the EU average.

8.2.2 Establishments[1]

Indicator description (RDMS)			
Area	**Indicators**	**Definition**	**Base**
Access and basic usage	Internet users	Percentage of establishments using the WWW	All establishments
	Access to the Internet via broadband	Percentage of establishments that access the Internet via DSL, cable, or leased line	All establishments that use the Internet
	Establishments with Intranet	Percentage of establishments that have an Intranet	All establishments
	ICT spending planned to increase	Percentage of establishments which are planning to increase spending on ICT in the next 12 months	All establishments
	Establishments with website	Percentage of establishments that have a website on the Internet	All establishments
eCommerce	Online selling	Percentage of establishments that sell online or distribute digital products online	All establishments
	Online purchasing	Percentage of establishments that purchase online	All establishments
	EDI users	Percentage of establishments that use EDI	All establishments
	Use of Extranet to connect value chain	Percentage of establishments that have an Extranet	All establishments
Training and skills	Establishments offering computer-related training	Percentage of establishments that offer computer-related training courses to their staff	All establishments
	Establishments using e-learning	Percentage of establishments that use e-learning tools (online or offline) for training their staff	All establishments
	More than 75% of staff need computer skills	Need for any computer skills in the establishment: More than 75% of staff	All establishments, excluding DK
	More than 75% of staff need Internet skills	Need for Internet skills in the establishment: More than 75% of staff	All establishments, excluding DK
	Establishments advertising jobs online	Percentage of establishments that have published job adverts on the Internet	All establishments
eGovernment	eGovernment users	Establishments that have used the Internet for receiving at least one of four typical services provided by government/ public administration in the 12 months prior to the survey	All establishments that have carried out at least one of these four typical services provided by government/ public administration in the 12 months prior to the survey
	eGovernment refusers*	Percentage of respondents who agree completely that they do not need any eGovernment services	All establishments
* = scale inverted in figure below			

1 All values weighted by employment





Note: In the upper figure (relative performance), the scale has been inverted for indicators where high values are considered negative (see table). This means that if the bar is blue and pointing towards the right for “eGov refusers”, for example, this means that in this region below average shares of establishments are classified as eGov refusers.

The proportion of establishments using the Internet (71%) and broadband (30%) in the Greater Manchester business environment remains below the EU average of the BISER survey. However, with around 60% of businesses, there are considerably more establishments that have their own Intranet or website in comparison to other European regions. ICT spending is likely to increase in the future. These results correspond with the sectoral structure in the region with many service industries and a large proportion of creative industries. It is vital for most of these service-oriented businesses to reach a broad customer base not only in the region but also nationally and internationally – this is reflected by the above average proportion of online sales. Service sector businesses are also less likely to have electronically connected supply chains because their key resources are based on knowledge rather than materials.

While general skills development is popular in Greater Manchester, as illustrated by the survey results above, computer and Internet skills appear to be less important for businesses. The computer skills index in the population survey is well above the EU average but the proportion of businesses where more than 75% of the employees need to have computer skills stands at only 31%, Internet skills play an even smaller role. However, 44% of the establishments interviewed offer computer-related training courses for their staff.

Although higher amongst the population, the proportion of businesses using e-Government services via the Internet stands at only 19%. This is considerably below the BISER EU average and also the lowest result amongst all four participating UK regions. Additionally, 31% (12% less than the EU average) of the responding businesses stated that they would not need to use any e-Government services. The UK Government has a target to deliver 100% of Council services electronically by the end of 2005. This could potentially save costs for local Government in the long run, but from the results of the BISER survey it seems that a great deal of progress still needs to be made to increase the acceptance and usage of such online services. In this respect the UK is clearly lagging behind other EU regions.

Bringing both surveys together, the Greater Manchester business base seems to be lagging further behind the BISER EU averages in terms of ICT access and basic usage than the general population. However, there is potential for growth and increased spending. Regarding the general users, Internet usage appears to be rather saturated with only 8% of non-users planning to take up the Internet in the future. The key issue to address is clearly the usage of various online-services – especially public services. [There seem to be similar trends within both samples. Saturation levels amongst those within the general population who can afford to be regular e-users seem to have been reached whilst others seem to view themselves as being priced out of the market. Less demonstrably, saturation levels amongst businesses who need e-literacy may have been reached whilst amongst others there is less use and perceived need for e-literacy. Both have implications if one outcome of this analysis is intended to be a further push on e-use and e-literacy amongst the general population and businesses.]

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