



## **GM LOCAL ENTERPRISE PARTNERSHIP BOARD**

SUBJECT: GM Business/Economic Update & Growth Company Support Activities

DATE: 15<sup>th</sup> December 2020

FROM: Mark Hughes, Group Chief Executive, Growth Company

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### **PURPOSE OF REPORT**

To provide an update on the business and economic situation in Greater Manchester and how, in response, The Growth Company is providing vital support to the GM economy and the report specifically focuses on the GC's Business Support, Marketing Manchester and MIDAS activities. The report focuses on new initiatives or significant changes rather than reporting on all components of our support to businesses since Covid-19 impacts commenced.

### **RECOMMENDATIONS:**

Members are asked to note the contents of the report.

### **EQUALITIES IMPLICATIONS**

The Growth Company are committed to putting equality, diversity and inclusion at the heart of its services. The activities which are updated upon within this report are delivered with the recognition of the importance of supporting a diverse range of businesses and individuals across Greater Manchester and providing equal opportunities and for all. Programmes are designed and monitored for EDI.

### **CLIMATE CHANGE IMPACT ASSESSMENT AND MITIGATION MEASURES**

Whilst not covered under the details of this report, The Growth Company support and deliver services which contribute towards GM's ambition to achieve carbon neutral living in the city-region by 2038. This includes specific projects such as the Low Carbon programme and providing support and advice to businesses to accelerate their implementation of energy and material efficiency measures in the design and production of their products and services. GC also provides a focused sector development programme for the Low Carbon and Environmental Goods and Services sectors.

### **CONTACT OFFICERS:**

Mark Hughes – Chief Executive, The Growth Company

## **1. BUSINESS AND ECONOMIC CONTEXT**

- 1.2 GC Business Intelligence team is continually monitoring a range of data and information sources and indicators to understand the impact that Covid-19 is having on the economy and business, with this intelligence use to inform and direct GC's activities.
- 1.3 GC also utilises the insight gained from its advisors working with thousands of businesses across GM and since Covid-19 hit, has undertaken a continuous survey of business impacts and issues with over 6,500 surveys now completed. The latest observations are shared below.

- 1.4 The latest figures from the Office for National Statistics show that the UK economy grew by 15.5% between July and September, the largest increase on record. However, growth slowed in September to 1.1% and the UK economy is still 8.2% smaller than it was before the Covid-19 crisis. The economy had previously contracted by a record 19.8% between April and June. According to the Business Impact of Coronavirus (COVID-19) Survey, 14% of UK businesses said they had low or no confidence that their business would survive the next three months. 9% of the UK workforce remains on furlough, while the proportion of the UK workforce that is now back at its normal place of business is nearing 60%.
- 1.5 The latest UK Regional PMI data shows a loss of momentum across the UK during October, with some areas seeing setbacks to activity amid tighter restrictions to tackle the spread of Covid-19. Eight out of the nine regions recorded a rise in business activity in October, but growth slowed in all cases. The South East recorded the steepest increase (business activity index 57.1, over 50=growth), followed by the East of England (54.9). A general lack of pressure on business capacity was reflected in a drop in manufacturing backlogs of work across more regions. The majority of regions also reported higher average output prices in October, with West Midlands, Yorkshire & Humber and the North West all reporting the highest rise in prices.
- 1.6 ONS Figures also show that a record 314,000 people lost their jobs from June to September, boosting the UK unemployment rate from 4.1% in quarter 2 to 4.8% in quarter three. The ONS found that young people have been the worst affected during the crisis as the unemployment rate for under 25s stood at 14.6%, which has been attributed to young people's tendency to work in sectors most affected by Covid-19 restrictions, e.g. Hospitality, Leisure and Retail. Moreover, the self employed have been badly affected by a reduction in earnings and the London School for Economics found that around a million of these individuals are planning to move away from self employment.
- 1.7 Unsurprisingly, the arts, entertainment and recreation industry, and the accommodation and food service industry, had the highest proportions of their workforce on partial or full furlough under the terms of the UK Government's Coronavirus Job Retention Scheme, at 34% and 22% respectively. The ICT and professional, scientific and technical activities industry had the highest proportions of their workforce working remotely instead of at their normal place of work, at 77% and 65% respectively. The ICT industry also had the lowest proportion of their workforce at their normal place of work, at 19%.
- 1.8 The number of job adverts posted has risen to levels not seen since before lockdown in March. There were 1.36 million active UK job adverts in the first week of November, according to the Recruitment Employment Confederation. However, the BBC noted that regional disparities were clear, with North West England and Wales leading the recovery. Seasonal vacancies have plunged this year by approximately a third due to the pandemic, but there are still thousands of openings.
- 1.9 Certainly, there has been a continued upturn in the number of vacancies across Greater Manchester. On 19<sup>th</sup> November the number of vacancies advertised across GM were approaching 29,000 whereas, on 6<sup>th</sup> November there were under 26,000 live vacancies in GM. The sectors advertising the most openings are IT (particularly in the City of Manchester, Salford and Trafford); Healthcare and Nursing; Teaching; Sales and Customer Services. At present, Logistics and Warehousing vacancies are particularly prominent in Bolton, Oldham, Rochdale and Wigan.
- 1.10 **GC's Business Survey** was enhanced early in the pandemic to ensure that ongoing support could be effectively targeted and to date has had over 6,500 responses (including repeat surveys from some businesses). GC produces a weekly Situation Report (SITREP) for GMCA, which is fed into GM resilience forums and is shared with Local Authorities and other partners. Below is a summary of the fortnightly survey results covering the 2-week period up to 23<sup>rd</sup> November (164 firms completed the survey during this period):

- The three main impacts facing businesses remain **decreased sales** (64% vs 43% previous report), **cashflow problems** (33% vs 31% previously), and **business travel to visit clients** (25% vs 28%). 52% of firms report that they have cash reserves to last over 6 months, up from 51% previously.
- There has been a sharp increase in firms reporting decreased sales over the two-week period. By sector, the impact of decreased sales is most prevalent in hospitality/leisure/tourism, creative and cultural industries, parts of administrative professional services, and retail/wholesale.
- 85% of firms said they were **not planning to make redundancies** at all. 8% said they have **made redundancies** but no more are planned, 3% said they have **made redundancies and they are currently considering making more** and the remaining 4% said they have **not made any redundancies** yet, but they are actively considering making redundancies in the future.
- The main challenges reported were: **getting access to new domestic sales opportunities** (68% up from 60% previously), **managing the overall finances of your businesses** (32% up from 23%) and **developing new products and services** (31% down from 33%).
- 52% of firms said that the impact of the transition and exit from the EU had a 'neutral' effect on their business, 12% said 'negative' and 34% were 'unsure'.
- 43% of firms (40% previously) **expect profits to increase**, and 23% (22% previously) **expect profits to decrease**. The manufacturing sector is most likely to report an increase in profit and parts of the professional services are most likely to report decrease in profit.
- The main future challenges highlighted by firms include: adopting digital technologies / transformation, finding suppliers and managing supply chains, and finding the right skills. The main areas of further support which businesses are interested in are: planning, marketing, digital transformation and financial advice.

1.11 RedFlag Alert insolvency data shows little change in risk in GM in the two weeks to the 20<sup>th</sup> November. The highest volume of 1-3 red flags was prevalent in the retail and wholesale sector, followed by business services and manufacturing companies. Real estate, business administration support services, and construction reported the highest concentration of 1-3 red flags.

## 2. RESPONSE – GC SUPPORT ACTIVITIES

### Business Finance

- 2.1 **Bounce Back Loan Scheme (BBLs)**. GCBF launches its £10m Bounce Back Loan Scheme on 16<sup>th</sup> November in order to support the many businesses who are dependent on loans at this time to continue to survive and grow as a result of the impacts of Covid-19 and local restrictions in place. By the following day, £16m worth of enquiries had been received and applications had to be paused. Significant levels of ineligible applications have been received (e.g. outside GM, banking with an accredited provider) and also duplicate/fraudulent activity. To 8th December, we have received 685 applications worth a total of £24.8m. Of these, 335 (£12.876m) have been declined, 135 withdrawn (£4.43m), 41 approved (£1.224m) and a further 117 (£4.18m) are in review.
- 2.2 **Coronavirus Business Interruption Loan Scheme (CILS)**. In terms of larger business loan activity, GCBF have invested £3.49m, with £2.2m of the total invested funded by NPIF micro loans. This takes total NPIF investment to £8m of the available £10m, with 18 months of the initial investment phase remaining. The announcement of the availability of a further £100m to NPIF in the Spending Review coincides with a bid from GCBF to the fund for further capital which was submitted before the announcement.
- 2.3 **Innovation & Angel Finance**. Demand continues to be high across GM with a reduced supply of private capital in the early stage market continuing. GC Angels has now invested £1.919m of LGF funding which has generated £8.9m of co-investment, with a further pipeline worth £16.48m.

- 2.4 **Start-up Loans.** After a slow start as a result of the immediate impact of Covid-19, Start Up Loan activity is now increasing. £3.185m has been invested in 272 GM start-ups. Start Up Loans has also benefitted from increased capital in the Spending Review which will fund a further 1,000 Start Ups across the UK in 21/22.

### **Business Support**

- 2.5 **Redundancy Support/EmployGM.** GC continue to receive and monitor HR1 notifications, with a system in place across GC Employment, GC BGH and DWP, who are working closely to ensure that both the business and their employees receive the support they need. For example, following the recent announcements made regarding the collapse of Debenhams and Arcadia, GC have proactively reached out to make contact with the branches affected and are liaising with partners including GMCA, DWP and Local Authorities in order to provide a co-ordinated response, and ensure that employers/individuals are aware of GC's services. This includes EmployGM, which helps to signpost individuals to find the support that they need in order to find new roles or develop new skills, and to date has received 18,400 visitors.
- 2.6 **GC Kickstart.** GC's kickstart offer is underway, with a number of applications submitted to DWP. To 3<sup>rd</sup> December, 149 placements have been approved (which includes 31 placements within GC), with over a further 680 placement opportunities in the pipeline which are at various stages in the application process. GC have established partnerships with a number of organisations to provide white label services including: GMCVO, Bruntwood, Stockport Local Authority, Scaleup Institute, London & Partners, Bionow, Forum of Private Business. A number of LAs have also agreed to make referrals to GC's kickstart programme. GC's Tier 3 offer has the potential for Aspire to directly employ a Kickstarter, who is then placed/hosted in a business, however, we are still awaiting final confirmation from DWP on this route.
- 2.7 **Enabling access to grant funding to deal with the effects of Covid.** GM has been allocated £1.4m of funding from MHCLG to provide 100% grants of up to £3k to businesses impacted by Covid. BGH received over 1600 EOIs by the 9th September deadline. The EOIs have been scored based on how a business has been impacted by COVID, the numbers of jobs the grant would safeguard, and how the grant would be used to support productivity. To 20th November, 101 projects were going live, with 60 businesses requesting minor capital equipment (59%) and 41 requesting consultancy support (41%). 50 are Visitor Economy and 51 from the Wider Economy.
- 2.8 **Skills for Growth.** Launched on 30<sup>th</sup> October, BGH will be supporting 4,000 SMEs across GM to reskill their workforces via the Skills for Growth programme, supporting the city region's long-term economic recovery in response to Covid-19. Funded by the European Social Fund and commissioned by the GMCA, the Skills for Growth – SME Skills Support package will be delivered in partnership with the Greater Manchester Chamber of Commerce (GMCC). The scheme will support businesses that need to better understand and develop their staff skill sets and business models to ensure they are future-proofed and in a strong position to grow. To the end of November, 112 businesses have been engaged by the Skills for Growth brokerage service, with 46 Skills Productivity Plans produced, and 3 Individual Skills Development Plans produced.
- 2.9 **EnterprisingYou.** Provides support for GM residents who are self-employed or Gig workers. The programme includes 1-2-1 access to a Business Coach & Specialist Advisors (Mentoring, Personal Finance & Health & Wellbeing); free access to a digital portal including H&W support; Career support & Training/Development provision. To date there have been 1,552 enquiries, 562 starts on programme, 174 clients have accessed the Finance Specialist, 137 the Health & Wellbeing specialist & 130 Mentoring. 59 clients have accessed and attended (i.e. completed) the Training & Development provision. To date the service is slightly behind profile on some targeted outputs due to Covid impacts on delivery; however, the figures are increasing significantly month on month, and

therefore we expect to be within/near profile by end of next quarter (Mar 21). Early indications from both the Evaluators & Customer feedback is that the service is being well received.

- 2.10 **Peer Networks Programme – Greater Manchester.** BGH are providing national co-ordination across Growth Hubs for the Peer Networks Programme in England. Within GM, BGH committed to deliver 16 peer network cohorts of up to 11 participants in each by March 2021. Based on evidence of demand this has been increased to 30 cohorts supporting a total of 330 participants who will benefit from a combination of both 18 hours of facilitated Action Learning and 3.5 hours of 1-1 support. The cohorts are being delivered in partnership with local delivery partners including GM Chamber, pro-Manchester and Bruntwood. Active involvement in the peer network will enhance the leadership capabilities, knowledge and confidence of business owners and entrepreneurs within a local region. The programme's longer-term aims are focused on reducing the UK productivity gap by helping business leaders find practical solutions to strategic and operational challenges.
- 2.11 **Business Support for Tourism, Hospitality & Leisure** GC BGH and Marketing Manchester have created a programme of support specifically tailored to the current needs of the tourism and hospitality sector across GM. Support includes: a specific landing page has been created with a dedicated contact number; identified BGH advisors with specific experience in this sector to support; provision of Clinics and one-to-one support to help businesses with their strategic direction, along with a programme of support where businesses from the sector can work together to identify opportunities for the future; an Access to Finance specialist for the sector, helping businesses understand their finances, looking at cash flow and helping to identify sources of finance. For self-employed, freelancers or people working in the gig economy, GC can provide access to the Enterprising You Programme.
- 2.12 **Employment Legal Advice Service.** GC launched a new service in partnership with Manchester Citizens Advice on 30<sup>th</sup> November. The service will provide support to individuals across GM to access free employment-related legal support, with legal experts donating their time on a Pro Bono basis. Law firms taking part include: Aaron and Partners, Glaisyers, Linder Myers, Monarch, Peach Law, Stephenson, Wrigley Claydon, Hattons Solicitors, and JMR Solicitors. Enquiries to the service will be passed on to a dedicated triage advisor who will review the case and decide on the correct pathway for the user, including whether to refer them to an expert from the network of legal partners.

### **Support For Tourism, Hospitality & Leisure**

- 2.13 **GM Tourism & Hospitality Support & Recovery Plan.** Launched in early November, the Recovery Plan has been developed by Marketing Manchester in partnership with the Tourism Industry Economic Recovery (TIER) group, which is comprised of leading voices across the tourism, hospitality and leisure sector including culture, aviation, transport, sport, conferencing, hotels, food and drink and retail. The aim of the plan is to help Greater Manchester's sector navigate the next six months before rebuilding, following the devastating effect of the Coronavirus pandemic.

The plan includes eight areas of focus. The first three that MM and partners have been, and will continue, to support: providing a regular programme of business advice and information; support across GM to lobby for continued Government support; and raising the profile of GM's tourism, hospitality and leisure sector at a national level. When the time is right to move towards recovery, the plan prioritises an additional five areas of focus: rebuilding consumer confidence in, and the profile of, Greater Manchester; rebuilding the region's international profile and connectivity; building back the business visits and events (conferencing) sector; better demonstrating how the tourism, hospitality and leisure sector can support Greater Manchester's wider strategic objectives; and seeking consensus for a more sustainable structure for DMOs like Marketing Manchester, to ensure businesses continue to benefit from their support and activity.

2.14 **Tourism and Hospitality Support Hub:** GC/MM set up the Tourism and Hospitality Support Hub to signpost and connect the sector to advice, support, research and reopening guidance. To date the website has received 18,584 visitors. The most visited pages are Government Advice Industry Updates. As mentioned above, Marketing Manchester have also been working closely with GC BGH to target support towards businesses in the Tourism, Hospitality & Leisure sector.

2.15 **Recovery Campaigns:** MM has delivered several recovery themed campaigns with partners:- Manchester Misses You, Find Your Space and Space to Learn, which collectively reached audiences over 12m with engaging inspirational content:

- **Find Your Space in GM** – aimed to help rebuild confidence in Greater Manchester as a place to visit, live and work. To date the campaign has received 98,600 views, Facebook impressions 2.39m, Twitter impressions of 867,000.
- **Space to Learn** – bespoke campaigns were delivered in partnership with UoM, MMU and Salford University to re-affirm GM's attractiveness to students with the aim of ensuring students take up their places this year and/or apply to study in Manchester for next year. The campaign has achieved a reach of +4million.
- **Have A Night on Us Short-break Campaign** – MM launched an Autumn Shortbreaks campaign on called 'Have a Night on Us' in partnership with MHA (Manchester Hoteliers Association) to promote hotel offers that include a free night. The campaign was halted after a week when restrictions were increased and will restart when restrictions allow.
- **Space to Meet** – this campaign is focused on business tourism but was put on hold due to additional restrictions. However, MM's conference bidding activity continues and to date 5 conferences have been won with an estimated economic impact of £4m, including: 3<sup>rd</sup> International Conference on Energy Research and Social Science (September 2021); UKInbound Annual Conference (postponed to June 2021); Para Power Weightlifting World Cup (March 2021); World Para Swimming Championships (August 2023).
- **Back to the office** - campaign development is underway to target commuters to encourage them to begin returning to offices, aiming to increase footfall and support transport providers, hospitality, retail and cultural businesses. Timing for commencing this campaign will be aligned to GM's Tier status and government work from home advice. The campaign will include supporting GM's business organisations in communications with business networks and employees.

2.16 **GM Priority Thematic Campaigns:** Longer-term strategic marketing campaigns will focus on three integrated multi-channel campaigns to run in 2021: Digital, Green and Innovation. These themes align with and deliver against GM's LIS, Economic Proposition and Internationalisation Strategy and will include inward investment and business conference delivery strands.

- **Innovation.** "Powered by Innovation Campaign" aims to strengthen GM's position as a leading region for innovation. To drive economic growth across GM and beyond, by building on our globally leading R&D and innovation capabilities, to deliver increased prosperity, and longer and healthier lives for all GM's citizens. Multiple sectors will be featured within the campaign including: Advanced Manufacturing and life Lifesciences and will be aligned with Innovation GM.
- **Digital.** The 'Digital in the DNA' campaign will showcase Manchester's digital strengths and position the city region as a digital exemplar on a global scale. The campaign will enhance GM's reputation as the business location of choice for digital sub-sectors where it outperforms all other UK cities – cyber security, eCommerce, AI and data, service design, IoT, MedTech (& strengthening the foundations of economy).
- **Green Campaign.** A 'Greener Manchester' Campaign is in development for 2021 in conjunction with key partners and organisations including GC, MIDAS, GMLEP, GMCA and the private

sector. Work is underway to explore a unified GM presence at COP26, the United Nations Climate Change Conference to be held in Glasgow, Nov 2021.

- 2.17 **Industry Research:** Marketing Manchester have partnered with NatWest, who sponsor the North of England Tourism Business Barometer, including 9 other destinations participating. The most recent 7th fortnightly results report that customer footfall has significantly dropped and businesses trading with a shortfall of customers over 60% is now 82% (increase of 15% on Wave 6). This Wave is the 2nd worst (after Wave 6) for job losses, with 83% of businesses reducing their permanent workforce and 69% reducing the number of temporary/casual staff within their operations. There continues to be a poor and worsening outlook for advance bookings up to Christmas, with 94% now reporting a 'significant' downfall for Oct – Dec (increase of 14% on Wave 6). For Jan – Mar 2021, 80% report a significant downfall in business (this remains the same as Wave 6). The perceived length of recovery and for revenues to return for Wave 7 is by Jan 2022 (marginally better than Wave 6). This demonstrates the scale of challenge for businesses in Greater Manchester.
- 2.18 **LEP Economic Proposition and Launch.** Marketing Manchester has provided content curation and communications activity, on behalf of the GM LEP, and working with GMCA colleagues to articulate Greater Manchester's economic proposition, strengths and ambitions. Communications aim to reinforce awareness of Greater Manchester's unique strengths and ensure that the Government is fully aware of the city-region's capabilities and ability to play its part in delivering the UK's recovery agenda. The aim is to secure maximum Government support to deliver interventions that will safeguard jobs and economic prospects in Greater Manchester, the North of England and UK. The Proposition was launched on 18th November with 170 delegates registering. Speakers included Cllr Elise Wilson and GMLEP Co-Chairs, Mo Isap and Lou Cordwell. Media coverage was achieved in eight publications providing over 1million OTS and social media which a reach of 214k. The Economic Proposition has been downloaded over 500 times to date.

### **Inward investment**

- 2.19 Before coronavirus struck, the transforming UK economy was offering the prospect of strong growth in FDI. In 2019, the number of new FDI projects coming into the UK rose by 56, or 7.4%, to 782 — the second-largest inflow of new projects secured by the UK in any year in the past decade. Within this overall strong performance, the UK had been particularly successful in attracting digital tech FDI, leading Europe by a significant margin. At the same time, investors' level of concern over the effects of Brexit appeared to be declining, with EY's investor sentiment research strongly supporting the positive view of the UK's prospects going into 2020. Before COVID-19 exploded onto the global stage, 31% of investors were planning to invest in the UK in 2020. That proportion represented both a significant increase from 23% in the previous year's survey and the highest positive sentiment for the UK in over a decade. All of this pointed to a relatively bright outlook for UK FDI as we went into the pandemic, whereas now:
- 30-45% fewer FDI projects expected in the UK in 2020 than in 2019;
  - 25% of overseas investors are planning investment projects in the UK in next 12 months – down from 31% in April;
  - There have also been significant changes in the sectors investors expect to drive future UK growth. Half of those surveyed expect **digital investment to be key to growth** (up from 26% in 2019), followed by **investment in health and wellbeing** (36% up from 15%), and real estate and construction (31%, up from 10%);
  - A country's ability to handle future crises and their track record with COVID-19 are top factors in investor decision-making;

- New opportunities emerging with 32% of manufacturers planning to ‘reshore’ activity to UK given pandemic disruption and the changing economic model in city centres identified by 61% of investors as shaping their future strategy;
- Investors’ outlook for the UK is stronger than it is for Europe and the UK is Europe’s second most attractive investment destination.

(Source – EY *Attractiveness Survey UK, November 20*)

**2.20 Inward Investment Performance.** In terms of MIDAS’ current performance, the year on year picture is that project numbers are down by 32% and jobs by 50%. This is largely through projects being delayed rather than being formally cancelled/going elsewhere and therefore there is a chance that they may come back online over the coming months. Likewise, the pipeline has somewhat recovered from earlier in the year, with project enquires down by 16% and of these, jobs down by 14% compared to the same period of 19/20. This is a strong recovery from earlier in the year when these were 40 – 50% down, however, this rebound of the pipeline will take time to find its way through to project closures and ultimately outputs, which may move in to 2021/22. Therefore, as the pipeline is such as moving feast, the final year end 2021 forecast is currently circa 54 projects and 1,800 – 3,200 jobs. This will be 45% - 80% of the jobs target.

### 2.21 Covid-19 Sector Impacts.

- Despite COVID-19 delays, the **creative, digital and tech** team has seen a rise in projects from new and existing investors particularly eCommerce companies. On the whole, firms in the sector are able to productively work from home but feedback suggests that although productivity currently remains high, the need to facilitate innovation, culture and good mental health will likely be what drives businesses back to the office.
- The **financial and professional services** team has noticed an increased focus on technology and disruption. Changing work practices and lifestyle adjustments also seem to be pushing firms (not just BPOs and call centres) to think about their office footprint, whether to reduce or expand or completely rethink their location strategy. Customer service functions for industries experiencing low demand such as travel and hospitality are most at risk immediately, whereas the acceleration to online services continues to put long-term pressure on phone-based customer service functions in general.
- Most **manufacturing** businesses continue to operate, have brought back furloughed staff and redundancies are currently low. Aerospace has been particularly hard hit, though the diverse nature of Greater Manchester’s manufacturing sector means few firms had ‘all eggs in one basket’ so the effect has not been dramatic and has been further mitigated by effective pivoting.
- **Life science** companies are also bringing staff back from furlough with some recruiting agency workers to keep up with demand on manufacturing capabilities as a result of COVID-19. As a strong region for diagnostics, the team has noticed lots of companies diversify to offer COVID testing services and pivoting their technology use to address related issues, support triage, patient monitoring and the delivery of healthcare.

**2.22 ERDF Research & Innovation Programme.** The “Innovate Manchester” events programme is designed to bring together large organisations, GM SMEs, public sector & academia to collaborate on innovative new ideas. Events cover 4 cross-cutting themes with a webinar & Innovation Lab each (8 events in total), including: *Changing the Way We Produce & Consume*; *Our Digital Futures – Data & Ethics*; *Sustainable Cities & Infrastructure*; and *The Future of Human Experience*.

## 3 RECOMMENDATIONS

Recommendations appear at the front of this report.