Manchester City Council Report for Resolution

Report to:	Economy Scrutiny Committee – 25 May 2016
Subject:	Overview – Key Issues for Consideration during 2016/17
Report of:	The Chief Executive

Summary

To provide an overview of some of the key issues relating to Manchester's economy that will be of particular relevance to the work of the Committee over the coming year prior to it setting its work programme for 2016/17.

Recommendations

That the Scrutiny Committee members note and comment on the content of this report and to indicate which of the matters identified in the report they would like to consider in more detail during the course of the coming year.

Wards Affected: All

Manchester Strategy outcomes	Summary of the contribution to the strategy	
supporting a diverse and	The health of the city's economy is fundamental to the future prosperity of the city's residents and to ensuring there are jobs and opportunities for all.	
	Issues relating to the development of the skills of the city's residents are discussed in the report.	
	A healthy economy is a vital ingredient in ensuring that the potential of the city's communities is realised.	
	Ensuring that the city offers an attractive environment to live and work and addressing the need to reduce carbon emissions are both preconditions for a sustainable and economically successful city	
	The report highlights the importance to the city's economy of good connections at the international, regional, city wide and local level	

Full details are in the body of the report, along with any implications for:

- Equal Opportunities Policy
- Risk Management
- Legal Considerations

Financial Consequences – Revenue

None directly, although there will be resource implications associated with providing further detailed analysis for the committee associated with the issues identified during the course of the year.

Financial Consequences – Capital

None

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Background documents (available for public inspection):

None

1. Introduction

1.1 This report and the accompanying presentation aim to set out some of the main issues and challenges within the Committee's remit that are likely to be of particular relevance during 2016/17. Following a brief introduction on the city's population and economy the report highlights key issues of national, regional and local relevance.

2. Overview of the Population and Economy

- 2.1 According to the Office of National Statistics (ONS) Manchester's population stood at 502,873 in 2011. The city's population grew by 19% between 2001-2011 (Census, 2011) driven by international migration, a significant increase in the number of 18-34 year olds (39.5%), and a 'baby boom' (there were 40% more children aged 0-4 in 2011 compared to 2001). The rate of growth was the fastest of any city outside London
- 2.2 The expanding and increasingly diverse employment offer within the city driven by an established financial & professional service sector and recently fortified by growth in the digital, science, research and development sectors, explains why so many more people are choosing to live in Manchester. Oxford Economics forecast that the number of jobs in Manchester will increase by 43,000 in the period to 2024 (GMFM 2014). Of these, 36,000 will be within financial & professional services, digital, science and technology. It is within this broader context of a rapidly growing city that the Committee will need to consider the implications of a number of key issues over the coming year.

3. National Issues

- 3.1 The referendum on the UK's membership of the EU is due to be held on the 23rd June 2016. The Committee considered a report on this issue at its meeting in February. It is suggested that the Committee will wish to consider the implications of the outcomes of the referendum at a future meeting.
- 3.2 A number of bills are expected to be introduced in the Queen's Speech on 18th May which will have implications for the city. The Buses Bill is of particular importance. It is expected to provide the legislative framework for the introduction of a bus franchising system in Greater Manchester, similar to that which operates in London. This legislation was a precondition of the devolution agreement which will see the direct election of a Greater Manchester Mayor in 2017. The legislation is considered to be of fundamental importance to the delivery of a properly integrated ticketing system in Greater Manchester akin to that operating in many cities throughout Europe, something that has been a long standing objective of the City Council and Transport for Manchester.
- 3.3 The committee may wish to consider the implications of this legislation in more detail once it is published and the opportunities that it may provide to make it easier to connect local people with the employment opportunities which exist across Greater Manchester.

- 3.4 Other potential areas of legislation of relevance to the committee's work include potential bills on planning matters, railways and the digital economy
- 3.5 Also at National Level, the Royal Society of Arts launched the Inclusive Growth Commission in April 2016. The Commission will seek to answer two key questions of relevance to the committee's remit. First, is there a model(s) of place-based growth that also addresses social and economic inclusion? And, second, what is this model(s) and how might it be implemented in a UK context?
- 3.6 The Commission will look to influence policy makers and practitioners in the context of the evolving city-region devolution agenda, with an aim to publish final recommendations before the new metro mayoral elections in Greater Manchester and other areas in 2017. It is suggested that the committee may wish to be updated on the work of the Commission during the year and to consider how best to engage with its work.
- 3.7 Joseph Rowntree Foundation and the University of Manchester have jointly set up and launched the Inclusive Growth Analysis Unit, based in the University of Manchester. This will focus on similar issues to the Inclusive Growth Commission in the context of Greater Manchester's Devolution programme.
- 3.8 The roll out of welfare reform will continue to impact on the most vulnerable of the City's residents. Changes to the benefit cap and benefit entitlement for 18 to 21 year olds are to be implemented this year. Universal Credit will continue to be rolled out across the City for new benefit claimants.
- 3.9 In terms of welfare to work, the Coalition Government's flagship Work Programme, which rolled out large national contracts on a payment by results model is due to finish. As a programme it has delivered nationally and locally for Jobseekers but not for more complex claimants e.g those claiming ESA. DWP is contracting for a new Work and Health programme this year. However, the scope and scale of this programme has been significantly reduced and is likely to be more targeted. As part of the first Devolution Deal, Greater Manchester CA will be able to co-commission the programme in GM. Jobcentre Plus once again becomes the main delivery organisation for welfare to work programmes for the majority of residents who are out of work. Therefore our relationship with them at City and GM level is critical and as they review their estate, there will be opportunities for co-location with some of the City's reform programmes.

4. Regional and Greater Manchester Matters

4.1 The Government's stated intention of developing a Northern Powerhouse designed to re – balance the national economy and close the output gap between London and the south east and the rest of the country, is likely to give rise to a number of announcements and developments during the coming year. The specific transport related implications are discussed later in the

report.

- 4.2 Transport for the North, working with the northern local authorities commissioned an Independent Economic Review during 2015, the findings of which are due to be published in the next month, This work has sought to identify the specific strengths of the Northern economy which are truly "pan northern" and thereby to provide a basis on which to develop a consistent narrative that will enable the North to promote its economic strengths to national and international audiences. The committee may wish to consider the implications of this work and other Northern Powerhouse related developments during the year.
- 4.3 The coming year will see further work at a Greater Manchester level to develop the Greater Manchester Spatial Framework (GMSF). Through this document, the ten Greater Manchester districts are working together to produce a joint plan to manage the supply of land for jobs and new homes across Greater Manchester. The GMSF will ensure that we have the right land in the right places to deliver the homes and jobs we need up to 2035, along with identifying the new infrastructure (such as roads, rail, Metrolink and utility networks) required to achieve this.
- 4.4 2016 is also expected to see the publication of the Greater Manchester 2040 Transport Strategy which will be aligned with the Spatial Framework and set out a long term vision and more detailed delivery plan for the future of the Greater Manchester transport network.
- 4.5 It is suggested that the Committee may wish to receive reports on the development of both these documents and their implications for the city at appropriate points during the coming year.

Devolution

- 4.6 On 16 March 2016, as part of the 2016 Budget settlement, the Chancellor announced a further devolution deal for Greater Manchester, building on the first agreement in November 2014 and subsequent agreements in July and November 2015, alongside the Memorandum of Understanding that devolved £6bn of health and social care spending to Greater Manchester from 1 April 2016.
- 4.7 Greater Manchester has long been a proponent of functional and fiscal devolution and has made a strong and evidenced case for the transfer of influence and decision-making to local Leaders, better enabling them to respond to the city-region's priorities and needs, delivering better outcomes and better value for residents and businesses.
- 4.8 The package of additional measures devolved to Greater Manchester as part of the 2016 Budget settlement reaffirms the Government's commitment to maximising devolution to Greater Manchester over time and represents further progress along Greater Manchester's "road map" towards full control or influence over all public spending which takes place within Greater

Manchester.

- 4.9 Greater Manchester will continue to work with Government to secure the tools and levers required to empower local leaders to discharge their place-shaping role.
- 4.10 The latest devolution agreement in summary makes provision to transfer the following additional powers and responsibilities:
 - Greater Manchester will pilot the approach to **100% business rates retention**, ensuring that GM local authorities will be able to retain any growth in business rates income to invest in projects designed to secure further economic growth – three years ahead of schedule;
 - Government and Greater Manchester will jointly establish a Life Chances Investment Fund from April 2017, aligning funding from the Troubled Families Programme, the Working Well pilot and the Cabinet Office Life Chances Fund with local resources to increase investment in innovative approaches to delivering public resources;
 - Greater Manchester will have the power to establish a **Single Pot** for investment in economic growth, pooling transport funding with Local Growth Funding and GM "Earnback" investment funding;
 - Greater Manchester will take on a greater role in the delivery of **criminal justice services**, including greater involvement in the commissioning of offender management services, greater influence over education provision in prisons, and joint work with Government to better align services for youth offenders.
 - Greater Manchester has secured more influence over **funding to support the victims of crime**, and will work with Government to explore how other budgets could be devolved, including the custody budgets for female offenders, young offenders and those sentenced to less than 2 years in prison;
 - Greater Manchester will also work with Government on the national policy agenda to create a modern new prison estate by exploring options for a **Resettlement Prison** in Greater Manchester and will have greater involvement in future plans for the **local courts estate**;
 - Building on previous agreements, from 2016/17 the Government
 - will work with Greater Manchester to ensure that **adult skills provision** better achieves the outcomes needed locally and from 2018/19 the 19+ adult skills budget will be devolved in full to the GMCA; and
 - Greater Manchester will work with government to develop a strategic approach to **regulatory delivery**, building on the Better Business for All national programme.
- 4.11 In addition, Government has committed to:
 - consider Greater Manchester's business case for a Land Programme to bring forward development on brownfield sites following the production of the draft GM Spatial Framework in Autumn 2016; and
 - to work with Greater Manchester to pursue innovative approaches to

delivering social housing for GM citizens, including a review of the way that national housing programmes are structured and delivered and a discussion of the level of resources required by Greater Manchester to deliver local housing objectives.

4.12 It is suggested that the committee may wish to receive updates on the progress of devolution arrangements of most relevance to its work during the coming year.

Investing in the Growth of the Manchester Economy

- 4.13 The Greater Manchester Investment Fund (GMIF) operates on behalf of the GMCA and is responsible for a number of investment funds aimed at encouraging business growth, investment in property and infrastructure and new residential development. In total the GMIF currently has over £600m of resources invested into it for these purposes.
- 4.14 A range of individual Funds sit within the GMIF such as the Greater Manchester Loan Fund, the North West Evergreen Fund the Greater Manchester Housing Investment Fund. Overall over the last two years the GMIF has invested £84m into SMEs to support their growth and expansion, £148m has been approved for investments into property development to unlock sites and create the space for job creation and £97m of investment for new residential schemes has been approved from the Greater Manchester Housing Investment Fund.
- 4.15 More recently new Funds have been established within the GMIF such as the £40m Life Sciences Fund. This is a seed and early stage venture capital fund that will invest in Biotechnology, Diagnostics, Life Science Contract Research Organisations (CRO), Healthcare technologies and Medical Device businesses. Looking forwards successor Funds are currently in the process of being established using the new Greater Manchester ERDF Programme. It has already been determined that £97m of ERDF resources will be directed into successor arrangements for existing Funds, such as the Evergreen Fund, and also to establish new Funds, such as a dedicated Low Carbon Fund.
- 4.16 Members may wish to consider a more detailed presentation on how the GMIF has performed within Manchester and on the emerging ideas for expanding the scale, breadth and depth of the GMIF going forwards.

Transport Issues

- 4.17 An effective and attractive transport system that provides high quality connections globally, nationally, regionally and locally is fundamental to the city's economic success and to providing an opportunity for local people to access the employment opportunities that are available in the city.
- 4.18 In terms of international connections, the Airport has recently enjoyed its busiest ever year with 23.532 million passengers passing through its terminals in the year to the end of March 2016. 2016/17 is expected to see further growth with new routes having already been announced, including the first

direct route to mainland China which is due to commence operation to Beijing in June. Recent announcements regarding the expansion of terminal facilities mean that the trajectory of growth is expected to continue. Growth at the Airport is linked to significant new employment opportunities associated with airport expansion and the parallel expansion of the Airport City Enterprise Zone. The committee may wish to consider a report on the opportunities provided by this growth during the coming year.

- 4.19 The city is going through a period of major transport infrastructure investment. Within the city centre this has come together under "Project Grow". Recently completed projects include the Victoria Station refurbishment (October 2015), which has transformed the station and boosted capacity; as well as the opening of a new tram stop in Exchange Square at the heart of the city's shopping district (December 2015).
- 4.20 Work is ongoing to regenerate the area around Victoria Station, combining heritage buildings, with innovative new developments and public realm. NOMA will become a distinct new city centre neighbourhood with a mix of commercial space and residential units (circa 1,000). Similarly extensive work is taking place across the city centre to connect the new Exchange Square tram stop with a new route across the city centre. This Second City Crossing (2CC) will run from the Deansgate-Castlefield stop through to Victoria Station improving capacity, flexibility and reliability. A key aspect of this will be the redesign of St Peter's Square into a world-class public space.
- 4.21 Other key elements of Project Grow currently being delivered include:
- 4.22 **Bus Priority Package** one of the largest investments in Greater Manchester's bus network in decades, creating and improving over 25 miles of bus routes. As a result buses will be able to travel through the city centre more quickly and easily, providing a more reliable and punctual service. A key element of this is the transformation of one of the Manchester city centre's key transport routes Oxford Road. Work is underway to transform the route into a pedestrian-friendly zone giving priority to buses, hackney carriages, emergency vehicles and bicycles.
- 4.23 **Cycle Improvements** Over £20million is being invested across Greater Manchester to improve cycling routes and ensuring that different parts of the network are joined up and well connected. Improvements are currently planned for a significant number of routes across the city.
- 4.24 **The "Northern Hub"** represents over £1bn rail investment including the creation of the Ordsall Chord, a new section of track linking Castlefield junction in Ordsall to the Deal Street junction. This will mean that Manchester's three main train stations will be joined up for the first time, transforming the rail network around Manchester, increasing capacity and speeding up journey times across the north.
- 4.25 A package of improvements is also planned for both **Oxford Road and Piccadilly Station.** At Oxford Road the railway viaduct will be widened and

the platforms lengthened to accommodate longer trains. Work at the Piccadilly Station – including two new platforms (15 and 16) and a new footbridge - will allow more trains, with more seats, and extra space for passengers.

- 4.26 The Hybrid Bill to deliver Phase 1 of **HS2** from London to Birmingham is expected to receive Royal Assent before the end of 2016. A final decision on the second phase from Birmingham to Leeds and Manchester is also expected to be taken by Government in Autumn 2016.
- 4.27 HS2 and the Northern Hub are a once in a century opportunity for the regeneration of the city centre. The HS2 Manchester Piccadilly Strategic Regeneration Framework anticipates the delivery of 625,000 m2 of commercial space, 4,500 new homes, 100,000 m2 of retail & leisure space, 4,500 and the creation of 30,000 new jobs. Transformed connectivity around the North, with Manchester at its heart, will also deliver higher levels of productivity and greater competitiveness in the global marketplace.
- 4.28 Following the publication of the One North Report in August 2014, the subsequent publication of the Northern Transport strategy and the establishment of Transport for the North Government has announced plans to deliver sustained investment in transport infrastructure across the North. Government have recently reaffirmed their commitment to a number of projects including:
 - £60m committed for the development of plans for an improved east-west rail link ("Northern Powerhouse Rail") which aims to reduce journey times between Leeds and Manchester to about 30 minutes.
 - £161 million to accelerate the upgrade of the M62 to a four-lane smart motorway
 - £75 million to develop a business case for a 18-mile Trans-Pennine tunnel under the Peak District to speed up journey times between Manchester and Sheffield
 - £150 million of funding to support the delivery of smart and integrated ticketing across local transport and rail services in the North
 - Future transport improvements are linked to the Devolution Agreement with central government and the establishment of Transport for the North as a statutory body from 2017 (TfN).
- 4.29 The 2014 Greater Manchester Devolution Agreement contained Government support for three key elements that will support the delivery of key transport policy objectives:
 - the extension of bus franchising powers (referred to above);
 - highways reform; and
 - local management of rail stations in Greater Manchester.

Skills and Employment Issues

- 4.30 The FE landscape in Greater Manchester will change as a result of the Area Review, due to be concluded in June 2016. This will affect FE delivery in the City but will be of wider interest given the travel to learn patterns for post-16 provision. The first Devolution Agreement in November 2014, gave the Combined Authority some devolved powers and budgets for adult skills. From 2018/19, the Combined Authority will be responsible for commissioning the Adult Education Budget and there will be a process to develop the necessary commissioning frameworks and governance in the period leading up to 2018/19. The Combined Authority is in the process of commissioning skills and employment support programmes in Greater Manchester, with circa £140m ESF.
- 4.31 Apprenticeships will need to grow significantly if the City, GM and our growth sectors are to meet their ambitions. Recent policy announcements about the apprenticeship levy for large employers and the introduction of an apprenticeship target for public services provides an opportunity to substantially grow the number and type of apprentices. Developments such as the degree apprenticeships in MMU provide an opportunity to complement graduates and provide alternative career pathways to deliver the higher level skills required by businesses.
- 4.32 Working Well, the Greater Manchester commissioned programme for longterm unemployed residents with an underlying health condition or complex needs, was piloted in February 2014. It was expanded from the pilot of 5,000 to 15,000 in February 16. The Big Life Group is delivering the pilot programme in Manchester and the Work Company is delivering the expanded programme. It is important that this programme succeeds at both City and GM level for those who are furthest from the labour market and to make a reduction in the number of residents dependent on ESA which has remained stubbornly high in the city and GM through periods of economic growth and recession.
- 4.33 In the City, there is some joint work between the Health and Well Being Board and the Work and Skills Board to better join the health and welfare to work systems to support residents with short-term or long-term health conditions back to work. Healthy Manchester is a GP referral scheme which started in North Manchester and has now been adopted by 19 GP practices across the City and proving to be successful. It delivers improved health outcomes as well as employment outcomes. Health & Social Care Devolution provides the opportunity to better connect and co-commission programmes with a work focus and evidence base to improve the population health of working age adults.

5. Local Issues

Our Manchester - The Manchester Strategy

5.1 Our Manchester, the Manchester Strategy was approved by the City Council

in March 2016. The Strategy sets a long-term vision for Manchester's future and describes how this will be achieved. The Strategy provides a framework for actions for all partners working across Manchester including public sector organisations, businesses, the voluntary sector and communities.

- 5.2 All of the key themes that provide the structure for the document have relevance for the work of the committee. These are:
 - A Thriving and Sustainable city
 - A Highly Skilled City
 - A Progressive and Equitable City
 - A Liveable and Low Carbon City
 - A Connected City
- 5.3 The document sets out a number of high level aims for the next ten years including:
 - Creating new jobs accessible to Manchester residents,
 - Reducing the number of people who are out of work;
 - Ensuring everybody is paid at least a real living wage;
 - Reducing the gap between our residents' wages and the average wage earned in the city;
 - Improving school results so that they are significantly better than the UK average;
 - Increasing the proportion of graduates and number of apprentices in the city;
 - Maintaining a balance between incomes and housing costs;
 - Having an integrated, smart and affordable transport system;
 - Being on a path to being a zero carbon city by 2050; and
 - Increasing productivity for the benefit of the city and the UK as a whole.
- 5.4 There are also a number of more detailed commitments under each theme. Those relating to the "Highly Skilled City" theme include:
 - improve educational attainment to be above the national average, with a focus of science, technology, engineering, maths, digital skills and creativity;
 - inspire the next generation to be the best they can and provide them with the knowledge, skills and resilience they require to succeed;
 - encourage a meaningful work placement for every young person;
 - support the positive contribution older people make through paid and voluntary work and their active contribution to city life and their communities;
 - use our devolved powers to align the skills system with the needs of our economy now and in the future;
 - continue to drive economic growth in high value sectors to retain and attract the best talent;
 - increase the number of apprenticeships, developing new models that encourage high level apprenticeships in a range of fields;
 - connect higher education institutions with businesses in the city to give graduates a clear route to quality employment or support for an innovative idea;

- encourage employers to unlock the potential of the workforce over the long term;
- reduce the number of people with no qualifications and increase the opportunity for people to improve their skills throughout their working lives; and
- respond to student expectations for sustainable development to be included in studies and institutional practice.
- 5.5 The delivery of the Manchester Strategy will require input from a wide range of different organisations from across the city. Progress on implementation is due to be reported collectively, each year, through the State of the City Report. The committee may wish to consider whether it wishes to consider how progress is being achieved against any of the above themes in more detail over the coming year.

Development Related Interventions

- 5.6 Over the next year the City Council will continue to promote and support a wide range of development related interventions that will drive forward economic growth and employment creation within the city. These interventions will inevitably be focussed within the newly expanded city centre as the principal economic growth engine for the wider region but the north, east, central and south of the city will also see significant developments being progressed which will all promote employment creation and align with the growth of our key economic sectors in the city and the city region.
- 5.7 Within the City Centre the next 12 months will see the following steps taken on key initiatives:
 - The development of a Growth Strategy for Piccadilly Station building upon the recommendation in the National Infrastructure Commission Report issued in March 2016 that we need to have robust plan for by the end of next year for the redevelopment of the station and its environs. This Growth Strategy will seek to harness the opportunities afforded by the station being an HS2 terminal and a Northern Powerhouse Rail (NPR) station with onward connections across the north. Funded by Government this work will be complemented by a similar Growth Strategy for the proposals to develop an Airport HS2 Station.
 - New Grade A office space will be completed on Spinningfields, St Peter's Square adding much needed supply to meet the requirements of both existing occupiers and inward investment enquiries. New Grade A office space on First Street has recently commenced and will be available for occupation by mid 2017.
 - The first phase of the St John's neighbourhood will begin later in the year. The design of Factory Manchester a unique flexible arts and performance space to be located at St John's will also be completed, with construction due to start in January 2017.

- A number of developments are due to take place to further grow Corridor Manchester. A few examples include:
- The first phase of implementation of the Manchester Science Partnerships masterplan, with No 1 MSP Central due to open early 2017.
- Corridor Manchester Enterprise Zone will become operational, providing business rate relief and support to encourage more science based start ups to relocate in Corridor Manchester.
- Start of the first phase of residential development at Circle Square (the former BBC site), along with new public realm, due to complete in autumn 2017.
- Completion of the £61m Graphene Engineering Innovation Centre (GEIC), is expected during 2017, to complement the recently completed National Graphene Institute.
- 5.8 Outside of the city centre the next 12 months will see the following progress on key initiatives:
 - Proposals to expand the city council's existing digital asset base on One Central Park and The Sharp Project will be accompanied by proposals to take forward the recently acquired 38 acres of undeveloped land on Central Park. The Space Project in West Gorton will commence its Phase Two expansion making it the largest film and drama hub outside of London and the South East;
 - The completion of the first wave of investment by City Football Group and the City Council at the Etihad Campus will now see proposals being developed to capture new commercial development opportunities in and around the Stadium environs. During 2016/17 a new masterplan and commercial plan will be developed that seeks to harness the existing asset base that now exists on the Campus;
 - The Manchester Airport City Enterprise Zone will continue to progress on Airport City South with major developments for Amazon being completed in the Autumn. Manchester Airport Group, with their decision to significantly invest in and transform Terminal 2, will review with their Joint Venture partners the existing plans for Airport City North to ensure that they are aligned to maximise the economic opportunities that will arise. This will be aligned with the development of the need to develop the Growth Strategy for the proposals to develop an Airport HS2 Station.
- 5.9 There are a range of other local matters that the Committee may also wish to consider. It is suggested that these could include:
 - Work of the District Centre Sub Group: This was established in 2015/16 to consider a range of matters that impact on the city's district centres which form the heart of the cities communities and are important to communities' economic wellbeing. The committee is due to confirm the continuation of this work during the forthcoming year.

Manchester City Council	Part 1 – Item 9
Economy Scrutiny Committee	25 May 2016

- Implementation of the Council's Work and Skills Strategy
- Regular updates on the City's economy including key economic indicators.
- Outcome of the GM Area Review
- Skills to support the growth of the digital and creative sectors
- Careers Education Information Advice and Guidance (CEIAG)
- The delivery and impact of GM commissioned Work & Skills programmes in Manchester

6. Conclusion

6.1 This report has sought to highlight a series of national, regional, sub regional and local matters that fall within the Committee's remit and which Members may wish to consider in greater detail during the coming year. Members are asked to consider these matters and indicate which subjects they will wish to consider and to indicate if there are other matters that they would wish to review.