

MONTHLY MONITOR



November 2018

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- The chancellor's announcements included the headline increase of **£20.5bn** for the NHS and short-term increases in areas such as defence and universal credit, with the chancellor given slightly more [wiggle room](#) due to higher than expected tax receipts.
- Brexit cast a long shadow, however, and while the chancellor maintained an upbeat tone, promising a "deal dividend" in the *Spending Review*, he also cautioned that the *spring statement* could be replaced by a full emergency budget if talks collapsed. After that point was trailed in the press overnight, Number 10 took the unusual step of seeming to rebuff the chancellor's "no deal" comments just hours before the budget, insisting that all measures would be funded regardless of whether talks ended in a no-deal scenario. The **Office for Budget Responsibility (OBR)** warned that no deal "could have severe short-term implications" for the economy, adding it would be "very hard to calibrate the potential impact given the lack of meaningful precedent." It also noted that investment in business had taken a hit since the EU referendum and suggested the economy was currently 2–2.5 per cent smaller than it would have been of the referendum had not been called.
- Although growth forecasts were slightly up since the spring statement, they were still poor in relation to previous years as they were not above 1.6 per cent in any of the next five years. Opposition leader Jeremy Corbyn accused the chancellor of putting forward "half measures and quick fixes while austerity grinds on", whilst IFS chief Paul Johnson said the budget was "barely the end of austerity". There may yet be bolder measures in the spending review next year, though Brexit uncertainty makes it difficult to predict how much leeway the chancellor will have.

The autumn budget 2018:

- The *Red Book* and full range of supporting documents for the autumn budget 2018 are available below:
 - [Autumn budget 2018 Red Book](#)
 - [Other supporting documents](#)
 - [Office for Budget Responsibility documents](#)
- After taking his place at the despatch box, the chancellor Philip Hammond declared that "austerity is coming to an end." This came as he announced public spending boosts worth **£30bn by 2024** – although his statement was slightly different to the prime minister's [claim](#) at *Conservative party conference 2018* that austerity was "over".

Among the relevant key announcements were:

Housing infrastructure fund:

- A further £500m for the housing infrastructure fund, to unlock a further 650,000 homes; The next wave of strategic partnerships with nine housing associations to deliver 13,000 homes across England; up to £1bn of British Business Bank guarantees to support the revival of SME housebuilders."
- "We are consulting on simplification of the process for conversion of commercial property into new homes; and because we want to see parishes and neighbourhoods enabling more homes for sale to local

people to buy, at prices they can afford so we're providing funding to empower up to 500 neighbourhoods to allocate or permission land for housing through the neighbourhood planning system for sale at a discount in perpetuity."

Infrastructure strategy:

- **4.14 National infrastructure strategy** – "The government will respond in full to the national infrastructure commission's (NIC) 'national infrastructure assessment' through a national infrastructure strategy that will be published in 2019." **Alongside the budget, the government published an [interim response](#) setting out its investment record and progress in the priority areas identified in the NIC's report.**
- **4.15 NIC study: infrastructure resilience** – "The government has commissioned a new NIC study, to be published in spring 2020, on how to improve the resilience of the UK's infrastructure in light of technological advances and future challenges such as climate change."
- **4.16 Infrastructure finance review** – "The government will review its existing support for infrastructure finance, to ensure that it continues to meet market needs as the UK leaves the EU."

Modernising transport:

- **4.8 National roads fund** – "The government is delivering its commitment to hypothecate English vehicle excise duty to roads spending, announcing that the national roads fund will be £28.8bn between 2020–25."
- **4.9 Roads investment strategy** – "The budget is announcing the draft roads investment strategy 2. This is the largest ever investment in England's strategic roads and will enable the government to build on the successes of roads investment strategy 1, such as the A1(M) link to Newcastle, and progress transformative projects like the A66 TransPennine, the Oxford–Cambridge expressway, and the Lower Thames Crossing. The government expects to spend £25.3bn on this strategy, funded by the national roads fund, between 2020–25."
- **4.11 Transforming cities fund extension** – "As part of the NPIF, the government is extending the transforming cities fund by a year to 2022–23. This will provide an extra £240m to the six metro mayors for significant transport investment in their areas: £21m for Cambridgeshire and Peterborough, £69.5m for Greater Manchester, £38.5m for Liverpool City region, £23m for West of England, £71.5m for the West Midlands, and £16.5m for Tees Valley. In addition, a further £440m will be made available to the city regions shortlisted for competitive funding. Ten city regions are eligible for this funding, and the government will shortly be announcing a further two."
- **4.12 Transforming cities fund: future mobility zones** – "To support the industrial strategy future of mobility grand challenge, £90m from the NPIF will be allocated to the transforming cities fund to create future mobility zones. This will trial new transport modes, services, and digital payments and ticketing. £20m of this will be allocated to the West Midlands."

Digital infrastructure:

- **4.13 Full fibre networks** – "The government set out its strategy to meet the goal of a nationwide full fibre network by 2033 in the Future Telecoms Infrastructure Review published in July 2018." Full fibre networks are much faster, more reliable, and cheaper to operate than their copper predecessors. The budget sets out the next steps to accelerate the rollout of full fibre:
 - the budget allocates £200m from the NPIF to pilot innovative approaches to deploying full fibre internet in rural locations, starting with primary schools, and with a voucher scheme for homes and businesses nearby. The first wave of this will include the Borderlands, Cornwall, and the Welsh valleys.

New technologies and innovation:

- **4.17** "Building on the government's long-term commitment to research and development (R&D), and the industrial strategy ambition to raise total R&D investment to 2.4 per cent of GDP by 2027, the budget includes significant additional support for cutting-edge science and technologies that will transform the economy, create highly skilled jobs, and boost living standards across the UK."
- **4.18 Long-term support for research and development** – "The budget allocates £1.6bn to strengthen the UK's global leadership in science and innovation. This reinforces the UK's commitment to a strong environment for international scientific collaboration. Since 2016, the government has invested an additional £7bn in research and development, the largest increase to R&D in 40 years."
- **4.19 Industrial strategy challenge fund** – "As part of this investment in R&D, the government will increase the Industrial strategy challenge fund by £1.1bn, supporting technologies of the future."
- **4.20 Quantum technologies** – "The government will invest a further £235m to support the development and commercialisation of quantum technologies, including up to £70m from the industrial strategy challenge fund, and £35m to support a new national quantum computing centre. These technologies will transform capabilities in computing, sensing and communications, bringing promising new approaches to solving global problems such as disease and climate change. This investment is in addition to the government's recent £80m extension of the quantum technology hubs and takes overall funding for the second phase of the UK's world-leading National Quantum Technology Programme to £315m."
- **4.21 Nuclear fusion** – "To maintain UK leadership in nuclear fusion and support the government's clean growth grand challenge, the budget announces an additional £20m in 2019–20 for the UK Atomic Energy Agency to accelerate its ground-breaking work on the development and commercialisation of fusion technologies."
- **4.22 Artificial Intelligence and data-driven innovation** – "The government has already taken action to ensure the UK is at the forefront of emerging digital technologies, including through the industrial strategy Artificial Intelligence (AI) and data grand challenge, and an AI sector deal of up to £950m."

- **4.23 Global AI and future talent fellowships** – “To attract, retain and develop world-leading research talent, the government will invest up to £50m in new Turing AI Fellowships to bring the best global researchers in AI to the UK, and £100m in an international fellowship scheme.”

Skills:

- **4.48 Apprenticeships** “The government will introduce a package of reforms to strengthen the role of employers in the apprenticeship programme, so they can develop the skills they need to succeed.” As part of this:

- the government will make up to £450m available to enable levy paying employers to transfer up to 25 per cent of their funds to pay for apprenticeship training in their supply chains;
- the government will provide up to £240m, to halve the coinvestment rate for apprenticeship training to five per cent;
- the government will also provide up to £5m to the Institute for Apprenticeships and National Apprenticeship Service in 2019–20, to identify gaps in the training provider market and increase the number of employer-designed apprenticeship standards available to employers. All new apprentices will start on these new, higher-quality courses from September 2020;
- the exchequer secretary to the treasury and the minister for apprenticeships and skills will work with a range of employers and providers to consider how they are responding to the apprenticeship levy across different sectors and regions in England, as well as the future strengthened role of apprenticeships in the post-2020 skills landscape

- **4.52 Post-18 education and funding** “The government’s review into the post-18 education and funding system in England will ensure that all students are given a genuine choice between high-quality technical, vocational and academic routes in a system accessible to all; students and taxpayers are getting value for money; and employers can access the skilled workforce they need. As part of the review, the government will receive advice from an independent panel, chaired by Philip Augar. The panel will report to ministers at an interim stage before the government concludes the overall review.”

Reaction to the budget:

- Commenting on the chancellor’s autumn budget, **Institution of Civil Engineers (ICE)** head of policy and public affairs **Chris Richards** said:

“We are pleased to see investment in the country’s key infrastructure, with a package for the second road investment strategy of £25.3bn for 2020–2025. However, it should also be remembered that as we move towards a largely electric vehicle fleet, the government must think about other forms of revenue to pay for major road development and maintenance. A pay-as-you-go road charging scheme should be considered, as ICE recommended in its recent state of the nation, for the nation’s busiest roads to ensure the long-term security of revenue for continued maintenance and upgrades.”

“Keeping local roads safe and useable for the wider public must also be a priority. The government’s commitment of £420m for local highways authorities to tackle immediate issues before the end of the year will be welcomed by local authorities and those who have seen the state of their roads decline as budgets get tightened. However, this is a small dent in the significant funding gap identified by the national infrastructure commission for local roads and should be seen as just the beginning of efforts to further improve local roads.”

- **CBI director-general Carolyn Fairbairn** said:

“This was a rock-solid budget, bringing more treats than tricks for business. It recognises the enormous contribution enterprise has made to balancing the UK’s books through jobs, pay and tax and responds to many of the recommendations that firms have made. But while the chancellor has reduced some of the biggest barriers to growth, he has missed some opportunities. That said, the new investment in broadband, research, housing and infrastructure will help tackle the UK’s glaring regional inequalities head on.

“Ongoing reform of the apprenticeship levy and collaboration with business on retraining reflects long-standing business advice and will help individuals adapt to a fast-changing world of work.”

“But there is no hiding from the dark clouds of Brexit uncertainty. The chancellor has made clear that this budget will need urgent attention in the event of ‘no deal’, showing yet again the seriousness of the situation and the need to get a good deal over the line.”

Party conferences 2018:

APM’s policy manager Stephen Rooney this year attended both Labour and Conservative party conferences – in Liverpool and Birmingham respectively. In addition to meeting with key stakeholders from across government, think-tanks, business organisations, professional bodies, and the third sector, Stephen attended a wide range of fringe events spanning a panoply of issues from skills to housing and Brexit. The following is a short summary of the key policy announcements:

Labour party conference 2018:

- In his conference speech, Jeremy Corbyn emphasised that the Labour party was “ready to take charge” and to deliver “a real alternative to the people of Britain — a radical plan to rebuild and transform our country.” The plans announced included:
 - workers’ seats on company boards, and the creation of employee shareholding funds;
 - an end to the “racket” of privatisation and outsourcing;
 - a “green jobs revolution” to create 400,000 skilled jobs in windfarms and home insulation;
 - an extension of free childcare;
 - public services with “fairness and humanity” at their heart;

- a new tax on second homes to pay for house-building; and
 - a foreign policy driven by "progressive values and international solidarity", with no more "reckless wars, like Iraq or Libya."
- LPC 2018 was dominated by debate over the party's official position on Brexit – with divisions emerging among members of the shadow cabinet and delegates as the wording of Labour's composite motion on leaving the EU was finalised on the first day of the conference. Shadow chancellor John McDonnell insisted the vote would *only* be on the terms of the Brexit deal – but Sir Keir Starmer, shadow secretary of state for exiting the European Union, went "off-script" declaring that "no one is ruling out Remain" and that "all options" would be on the table. One of the key highlights of his conference speech being a warning to Theresa May and the Conservatives that Labour is set to vote against the EU withdrawal deal Theresa May strikes with Brussels in a bid to "stop a destructive Tory Brexit". The party agreed a motion to keep a second referendum on the table.

Conservative party conference 2018:

- As expected, much of the Conservative conference was dominated by Brexit and potential leadership challenges this year. The prime minister sought to stay focused in part on her domestic agenda, uniting the party against their challenger, suggesting that one of Labour's key business proposals on shareholder assets was in fact 'government confiscation'.
- One of the key announcements was Mrs May's promise to "end austerity," which raised questions around what the budget would hold, as she also pledged to "continue reducing the debt in addition to announcing a fuel duty freeze for the ninth year." Stifling speculation around the fuel duty and a potential move to increased borrowing, the prime minister's speech raised the likelihood of tax hikes.
- There was recognition that the end of austerity hinges much on the outcome of leaving the EU and the materialisation of the potential "deal dividend", which the chancellor predicted would boost economic growth *provided the UK got a deal*.
- Overall, industry welcomed the commitment to frictionless trade, but with no further compromise to the chequers' position announced and with Labour promising to vote down a deal which does not meet their six tests, nerves are not quite settled.
- Beyond the EU question, the business community welcomed the move towards more flexibility around the apprenticeship levy, the focus on skills and the support to small businesses and appreciated the commitment the back business. However, announcements on the intention to 'go it alone' on digital taxation were met with caution by some, with calls for consultations and warnings on the risk of stifling a thriving digital economy. In contrast, despite sharing some of the ambitions of the Labour party to increase wages, improve corporate governance and focus on employee ownership, the business community expressed concern regarding the mandatory aspect of some of the policies including the inclusive ownership fund and the party's overall rhetoric around business.

Key relevant announcements:

Transport and infrastructure:

- Chris Grayling, secretary of state for transport said at conference that his recently announced [rail review](#) would "seek to address the disjointed nature of the current system". This, he said, would include a team of experts working "hand-in glove" with his department. The transport secretary was keen to stress that even with the disruption over the summer, the government was "continuing to spend more on rail than any other government", upgrading trains and tracks to deliver improvements and uplift capacity for passengers and for freight.
- Mr Grayling spoke too of the expansion of Heathrow and the construction of HS2, while the chancellor spoke of the increased investment in the Northern Powerhouse and the Midlands Engine, with a pledge to devolve more power to mayors.
- On aviation, Mr Grayling praised the success of the sector and brushed off fears that planes will not be able to fly post-Brexit. Heathrow, he said, would become "a strong hub airport" while flights between Newquay Airport and Gatwick would resume for a further four years, backed by funding from central government.
- Policy announcements (beyond hints that more substantive policy announcements would be forthcoming in the autumn budget 2018) thought few, included:
 - a recommitment to Newquay airport;
 - the introduction of "one-click compensation" for delays and disruption;
 - the announcement that a white paper on "delivering a rail revolution" would be published in 2019; and
 - the announcement of the details of the first five schemes as part of the *major road network*.

Education and skills:

- With "enhancing opportunity" a self-declared sine qua non for all announcements at CPC 2018, the education and skills agenda served as a particularly significant component of events. Aside from improving opportunities, policy announcements broadly coalesced around two major themes:
 - **Building on progress made since 2010**, with funding for the dissemination of good practice (through English and maths centres of excellence and behaviour management programmes) a clear example of this; and
 - **Creating an education system that "reflects the needs of industry"**. Greater detail on funding for the T-level reforms was announced in addition to proposed changes to the apprenticeship levy which would allow large firms to transfer up to support businesses in their supply chains, typify a desire to appear unabashedly pro-business and ameliorate any Brexit malaise amongst employers.

Housing:

Among the policy announcements on housing included:

- a *new homes ombudsman* – a watchdog that will “champion buyers, protect their interests and hold developers to account”;
- the minister for housing’s speech included a commitment to change the building regulations to ban the use of combustible materials for all new high rise residential buildings, hospitals, registered care homes and student accommodation;
- a higher rate of stamp duty for those buying homes *who do not live and pay taxes in the UK* – with funds generated put towards ending rough sleeping;
- the prime minister announced that the government will remove the cap on how much councils can borrow against their housing revenue account assets to fund new developments; and
- the prime minister also said that there would be “extra support for public services” – pledging the “end of austerity”.

Defence:

There were a number of announcements on Defence ahead of the October 29 budget, including:

- in the face of increased Russian aggression, the defence secretary Gavin Williamson announced that the UK would maintain its military presence in Germany;
- Mr Williamson sought to allay fears that the UK would lose its amphibious capability by underlining that *HMS Bulwark* and *HMS Albion* were crucial to preserving the capability of the Royal Marines; [This following a backlash over reports of proposed cuts in the *national security capability review* among several MPs and military commanders in addition to the publication of a report by the defence select committee strongly opposing the withdrawal of the two ships.]
- fears that conventional defence funding was to be side-lined for cyber capability led to the announcement of a separate *modernising defence programme* to look at military capability;
- a new support network for veterans;
- a *veterans transition policy*;
- the introduction of a veterans ID card;
- a *cyber security training programme* for 2,000 cadets a year; and
- a new *National Cadet Week* and a defence arctic strategy.

Can cities outsmart the robots? The future of skills in the UK:

- The think tank Centre for Cities published its report [*Can cities outsmart the robots? The future of skills in the UK*](#) examining how automation and globalisation are “transforming the skills needed to thrive in the workplace, and the extent to which people in English cities are gaining these skills.” The report shows that interpersonal and analytical skills – such as negotiation and critical thinking – are increasingly important for current and future workers, as manual and physical jobs are particularly under threat from automation and globalisation. The key recommendations of the report are that:
 - **every city should establish a ‘skills compact’**, bringing together policy-makers, education providers and businesses to collectively improve education and training at all levels. Priorities should include raising school standards and increasing extra-curricular opportunities for children and young people – especially those from disadvantaged backgrounds. This will support the development of interpersonal and analytical skills;
 - **the Department for Education (DfE) and devolved administrations should give cities more powers over spending on education and training**. This would enable places to experiment and tailor the provision of education and training to better meet the skills needs of their residents and economies;
 - **the Department for Education should also lead on creating a common framework to define interpersonal and analytical skills**. DfE should work with employers and skills experts to establish a clear definition of the interpersonal and analytical skills that are needed for current and future jobs, and review how they can be embedded in each educational stage; and that
 - **the government should lead a drive to increase provision and take-up of adult learning opportunities**, to help workers retrain and gain new skills. This should include raising the profile of existing adult training opportunities, and removing financial barriers which prevent workers from accessing training.

Reports, publications, and events across Westminster and Whitehall:

- The **secretary of state for business**, the Rt Hon. **Greg Clark MP** announced the full membership of the industrial strategy council. The members, spanning academia, business, and civil society are as follows:
 - Andy Haldane (chair) – chief economist, Bank of England;
 - Dame Kate Barker – commissioner of the national infrastructure commission and recently chair of the industrial strategy commission;

- Emma Bridgewater – founder of Emma Bridgewater Ceramics;
- Professor Diane Coyle – bennett professor of public policy at the University of Cambridge;
- Jayne-Anne Gadhia – ex-chief executive, Virgin Money. Member of the Scottish business taskforce;
- Christine Gaskell – Local Enterprise Partnership (LEP) chair, Cheshire and Warrington;
- Rupert Harrison – managing director of BlackRock;
- Dame Vivian Hunt – managing partner UK and Ireland, McKinsey, chair of CBI London council;
- Dame Rotha Johnston – chair of Northern Ireland screen;
- Professor Juergen Maier – chief executive of Siemens plc;
- Sir Paul Marshall – co-founder and chairman, Marshall Wace LLP;
- Sir Charlie Mayfield – chairman, John Lewis Partnership, chair of Be the Business;
- Lady Nicola Mendelsohn – advertising executive; vice-president for Europe, the Middle East and Africa for Facebook. Non-executive director of Diageo;
- Archie Norman – chair, Marks & Spencer. Formerly chief executive of Asda, chair of ITV, McKinsey consultant and director at GEEST, Railtrack and Kingfisher;
- Hayley Parsons – Welsh entrepreneur and investor, and founder of GoCompare;
- Roy Rickhuss – general secretary of community and member of the executive council of the General Federation of Trade Unions and the Iron and Steel Trades Confederation;
- Professor Dame Nancy Rothwell – president and vice-chancellor of the University of Manchester and professor of physiology, co-chair of the Council for Science and Technology and past president of the Royal Society of Biology;
- Professor Jennifer Rubin – executive chair of the Economic and Social Research Council (ESRC), professor of public policy at Kings College London;
- Rohan Silva – co-founder of Second Home, senior visiting fellow at LSE Cities; and
- Matthew Taylor – chief executive, Royal Society for the encouragement of Arts, Manufactures and Commerce (RSA).

A full meeting of the Council took place on 1 November in Number 10 where the group agreed how it will assess the government's progress on the commitments made in the industrial strategy. The council was joined for this inaugural meeting by the prime minister, the chancellor and the business secretary.

- The **secretary of state for transport**, the Rt Hon. **Chris Grayling MP** delivered an [oral statement](#) on the *rail review*, announcing simultaneously the publication of the review's [terms of reference](#). Among the key aspects of the speech were that:
 - the review will consider further devolution and the needs of rail freight operators;
 - the private sector has an important part to play in shaping the future of the industry; and that
 - the white paper expected in autumn 2019 and reform to begin from 2020.
- The **Department for Transport (DfT)** published its [Inclusive transport strategy: achieving equal access for disabled people](#).
- The **secretary of state for digital, culture, media and sport**, the Rt Hon **Jeremy Wright MP** delivered a wide-ranging speech at the **creative industries federation (CIF)** summit, stating that the creative industries accounted for 11 per cent of total UK services exports in 2016, the highest proportion since 2010.
- Minister of state for apprenticeships and skills, Rt Hon **Anne Milton MP** [wrote](#) to the chair of the **Engineering Construction Industry Training Board (ECITB)** confirming the government's priorities for 2018 to 2019.
- The **House of Commons education select committee** launched a [report](#) suggesting that apprentices are being "let down by poor quality training and lack of support." The report calls for clearer oversight of apprenticeship training and assessment and a tougher approach to poor quality training and recommends an expanded role for Ofsted inspections. Additionally, the report calls for a cap on the amount of training that new providers can offer until they have proved their provision is of sufficient quality.
- Among the [latest technical notes](#) published by the government on how to prepare if the UK leaves the EU with no deal are two specifically pertaining to rail:
 - [rail transport if there's no Brexit deal](#); and
 - [meeting rail safety and standards if there's no Brexit deal](#).
- The **House of Lords constitution committee** published its report on the [trade bill](#).
- The **chairman of the national infrastructure commission (NIC)** **Sir John Armitt** welcomed the [government's announcement](#) of a package of measures to develop greener infrastructure – and encouraged ministers to go even further. Sir John's response highlighted recommendations in the [National Infrastructure Assessment](#), to find low-carbon alternatives for natural gas for heating, and to gather further evidence to identify the most cost-effective solutions for delivering low-carbon heat. Sir John also delivered a [speech](#) to the *global engineering congress*.

■ The **House of Commons public accounts committee** announced that it is holding an [inquiry](#) into the DfT's implementation of Brexit.

■ The **House of Commons home affairs committee** published the [government response](#) to its report on policy options for future migration from the European Economic Area.

■ The all-party parliamentary group (**APPG**) for **healthy homes and buildings** published a report on [laying the foundations for healthy homes and buildings](#).

■ The government published a [list of updated ministerial responsibilities](#). The list details the following:

- ministerial departments;
- the ministers within ministerial departments;
- private offices of all the ministers; and
- the executive agencies within each department.

■ The **House of Commons women and equalities committee** published its [report](#) on sexual harassment of women and girls in public places.

■ The **House of Commons digital, culture, media and sport committee** published the government response to its [disinformation and fake news report](#).

■ The **National Audit Office (NAO)** published its report [The UK border: preparedness for EU exit](#).

■ Manchester metro mayor Andy Burnham made a public statement about the city-region's growth and how it is "exposing an outdated, fragmented and unaccountable transport system." The need to expand capacity of crucial road junctions, combined with the collapse of public confidence in rail services, has created a perfect storm which is causing real disruption to people's lives and livelihoods. The government issued a deadline to *Greater Manchester* to deliver a *clean air plan* by the end of the year. Mr Burnham responded that Greater Manchester is ready to face up to that challenge – but that any plan will be undeliverable and unsuccessful without devolved powers over a range of areas including roads, rail, buses and taxis.

Andy Burnham is asking people across Greater Manchester to sign up to the new [take control of our transport campaign](#), which makes a series of direct calls on the government, including:

- greater power over the running of the local and strategic road network, for example: oversight of Highways England to allow coordination of roadworks; joint planning powers; the ability to introduce civil enforcement of yellow box junctions; and a London-style lane rental scheme for roadworks by utility companies;
- greater power over the running of the rail network, including giving *Transport for the North* full oversight of the rail franchises and Transport for Greater Manchester (TfGM) devolved control of all rail stations;

- That the government must pass all enabling legislation for the Bus Services Act before the end of March 2019, so Greater Manchester can reform its bus system;
- the ability to regulate private hire drivers, vehicles and operators, repealing the provision that allows drivers with a license granted outside Greater Manchester to work in any local area; and
- a call for these powers to be underpinned by a major investment programme in Greater Manchester's infrastructure between now and 2025, as recommended by the national infrastructure commission.

Reports and publications – professional bodies/think-tanks/other:

■ The **Institution of Civil Engineers (ICE)** published its report [In plain sight: assuring the whole-life safety of infrastructure](#).

■ **IPPR** published [analysis](#) showing that approximately three quarters of EU employees currently working in the UK would be ineligible for a work visa, under the migration advisory committee's recent recommendations. The analysis shows that the reforms would have a "varied impact across different industries" but that the industries most likely to be negatively affected include hotels and restaurants (where an estimated 97 per cent of EU employees would be ineligible), transport and storage (95 per cent), and wholesale and retail (92 per cent). The least affected industries include financial services (where only 25 per cent of EU employees would be ineligible) and information and communications (30 per cent).

■ The **Institute for Government (IfG)** published its report [Accountability in modern government: recommendations for change](#) on holding former ministers to account.

■ Figures published by the **Society of Motor Manufacturers and Traders (SMMT)** showed a 3.9 per cent increase in the sale of *electric, hybrid and hybrid plug-in cars* in September 2018 compared with the same month last year – underlining the growing demand in the market and the need for a truly, national visible charging network to enable growth in electric vehicle sales to continue in particular, as outlined in the UK's first-ever [national infrastructure assessment \(NIA\)](#).

According to the SMMT, car sales figures show that overall car sales in September were down 20.5 per cent – including a 6.7 per cent decrease in sales of petrol-run vehicles. There was also a 42.5 per cent fall in diesel cars. In contrast, sales of electric, hybrid and hybrid plug-in cars were up 3.9 per cent, and now represent seven per cent of the overall market.

The *national infrastructure assessment*, published in July, made recommendations to improve the charging infrastructure to "allow customer demand to reach close to 100 per cent electric new car and van sales by 2030" and ensure the country secures the full benefits that this new technology can bring. Other NIA recommendations include that by 2022, the government should subsidise the provision of rapid charging points where the market will not deliver in the short

term; and that councils should allocate a portion of parking spaces – including on-street parking spaces – for conversion to electric vehicle charge points.

■ The **British Chambers of Commerce (BCC)** published the results of a [survey](#) on investment and recruitment in the event of a “no deal” Brexit. Among the BCC’s key findings were that:

- a fifth of businesses surveyed (21 per cent) will cut investment if there is “no deal”;
- 20 per cent will move part or all of their business to the EU;
- 18 per cent will cut recruitment; and
- 62 per cent of firms still haven’t completed a Brexit risk assessment.

■ **Universities UK (UUK)** published a report on skills development and the workforce entitled [Routes to high level skills](#). In addition to its key findings, the report identifies issues for further consideration, including:

- identifying regional skills needs;
- identifying a local focal point for collaboration;
- raising awareness of the opportunities and pathways to HE;
- the role of regulatory bodies in encouraging partnership development;
- funding to support development and increase reach; and
- funding for learners.

■ The **Education Policy Institute (EPI)** published a detailed analysis of University Technical Colleges (UTCs) entitled [UTCs: are they delivering for young people and the economy?](#)

■ The **Office for Students** has published [data](#) on degree apprenticeships. Among its key findings were that:

- the greatest density of degree apprenticeships is in the North West and North East of England (with the lowest proportion in London);
- more men took up degree apprenticeships than women;
- there are lower proportions from minority ethnic groups, compared with entrants on similar higher education courses.
- there is roughly an equal number of young and mature entrants;
- young students (under 21) are more likely to go into *science, technology, engineering and mathematics* (STEM) apprenticeships;
- a third of degree apprenticeship students come from disadvantaged neighbourhoods, which is slightly higher than the proportion entering similar full-time higher education courses.

■ The **Institute for Fiscal Studies (IFS)** published [research](#) on trade barriers with the EU after Brexit and the implications for men with few qualifications. Additionally, [new research](#) has been published by the IFS looking at young adults and the housing market in England. The analysis focuses on how barriers to homeownership have changed in the last 20 years and considers possible policy solutions. Among the key findings of the report are that:

- after adjusting for inflation, average house prices in England have risen by 173 per cent since 1997, compared with increases in young adults’ real incomes of only 19 per cent. Largely as a result, the share of 25 to 34-year-olds who own their own home fell from 55 per cent to 35 per cent between 1997 and 2017.

■ The **Nuclear Industry Association (NIA)** published its latest [nuclear jobs map](#) showing the distribution of over 60,000 nuclear jobs in regions across the UK, highlighting the important economic role the industry plays in all parts of the UK.

■ **Doteveryone** published [Regulating for responsible technology capacity, evidence and redress: a new system for a fairer future](#).

Doteveryone say that digital technologies “pose new problems for society” and that there needs to be a new kind of regulation to address them. It’s time, they say to “move from piecemeal regulation that tries and fails to play catch up with tech” to a new, systematic approach to accountability that “strengthens the UK’s democratic institutions and asserts the public’s values.” To achieve this Doteveryone is calling for a new independent regulatory body with three responsibilities:

- to give regulators the capacity to hold technology to account;
- to inform the public and policymakers with robust evidence on the impacts of Technology; and
- to support people to seek redress from technology-driven harms.

■ **Deloitte’s** latest [CFO Survey](#) (Q3 2018) of 95 CFOs of FTSE 350 and other large private companies has shown that over the past quarter, optimism and risk appetite have fallen among CFOs and that they look more willing to rein in corporate spending over the coming year. Among the key findings of the survey are that:

- 79 per cent of CFOs say they expect the long-term business environment to be worse as a result of leaving the EU – up from 75 per cent in Q2. [This marks the third consecutive quarter that concerns about the impact of Brexit have increased and this reading is now the highest since the referendum];
- CFOs are *more negative* on the effects of Brexit on their hiring and spending decisions: 50 per cent say hiring will slow over the next three years as a result of Brexit – up from 40 per cent in Q2;
- 44 per cent of CFOs say capital expenditure will slow – up from 34 per cent in Q2. While increasing in each of the last three quarters, neither is as high as they were immediately after the referendum; and
- CFOs are more concerned about the risk Brexit poses to their business. Rating risks on a scale from 0 to 100, the effects of Brexit scored at 67 (up from 60 in Q2), followed by weak demand in the UK at 56 (down from 57 in Q2).

- Consumer group **Which?** published its report [Brexit no deal: a consumer catastrophe?](#) analysing the consumer impacts of a "no deal" Brexit, should the UK and EU fail to reach an agreement. The report draws on the government's technical notices and consumer research to understand people's attitudes and expectations.
- **King's College London's Policy Institute** published [survey results](#) on Brexit and the standard of living.
- **Gatwick Airport** published its draft masterplan as a direct response to the government's recent call for UK airports to look at '[making best use of their existing runways](#).' In it, Gatwick will explore three possible scenarios for future growth:
 - main runway: Using new technologies to increase capacity;
 - standby runway: Innovative plan to bring existing standby runway into use;
 - additional runway: safeguard for the future.

Gatwick will also hold five public consultation events. The consultation, run by Ipsos Mori, is open until 5pm on 10 January 2019. [Click here to respond to consultation](#).

Reports, publications, and activity from the world of project management:

- ProMAC 2018 – 12th *International conference on project management* is taking place in Bangkok, Thailand from 27 November–1 December, 2018. Read more [here](#).
- The 8th *International scientific conference on project management* in the Baltic states will be held in Riga, Latvia during 25–26 April 2019. The [call for papers](#) remains open, with abstract submission until 1 December and full paper submission will be accepted until 10 February 2019.
- The [call for papers](#) for UMD's 2019 PM symposium (taking place 9–10 May 2019 at the University of Maryland campus in College Park) closes 11 November.
- The 13th UT Dallas PM symposium, entitled *Project management in a VUCA world*, will be held during 21–22 May 2019 in the Naveen Jindal School of Management on the UT Dallas campus in Richardson, Texas, USA. The [call for papers](#) closes on 14 January 2019.

APM events/research & policy outputs:

- On 31 October 2018, 271 project professionals from across the UK and overseas became the first Chartered Project Professionals in the world. Each of them gains a place on the APM's new Register of Chartered Project Professionals and are now able to use the new post nominal – ChPP. Read more [here](#).
- **APM** published three research summaries: [The aura of capability: Gender bias in selection for a project manager job; Errors, lies and misunderstandings: Systematic review on behavioural decision making in projects; and Project capabilities for operational outcomes in inter-organisational settings: The case of London Heathrow Terminal 2](#).
- **APM** published [Project leadership: skills, behaviours, knowledge and values](#) as part of its Research Fund Series.

APM forthcoming:

- **APM** will shortly publish a policy briefing on the National Audit Office (NAO)
- **APM's** Manchester conference takes place on Wednesday 7 November 2018.
- **APM's** AGM will take place on 19 November 2018.
- The [APM Project Management Awards 2018](#) sponsored by RPC UK Limited, will take place on Monday 26 November at Old Billingsgate, London.