

Wellbeing Economy Playbook



Tools and methods for
designing policies for a
wellbeing economy.

Foreword

Building a wellbeing economy approach to public policy is fundamental to addressing the root causes of the multiple challenges we face and to strengthening societal resilience that protects people against economic, social and political threats.

This involves redesigning the economy to prioritise wellbeing for people and planet. Ultimately, the aim is to reconcile multiple outcomes in the economic and social sphere with the environment by embedding wellbeing objectives and new measures of progress at the heart of public policy.

Central to building this new holistic and inclusive approach to the economy is the role of public policy-making. Operationalising such an approach in practice will require: rethinking traditional governance and policy design processes, structures and frameworks; refocusing policy priorities and goals; breaking down policy silos via joined up policy thinking, policy coherence and alignment; identifying policy scenarios, policy changes as well as the necessary mix of policy tools and instruments; and managing the different choices, tensions, and trade-offs. Crucially, it also requires co-creating innovative ways for open and transparent multi-stakeholder engagement, participation and deliberation to ensure broader societal buy-in and ownership in the delivery of this transformative policy agenda.

The Wellbeing Economy Playbook is an essential contribution to the practical implementation of a wellbeing economy policy approach into policy-making practices at all levels of governance. It provides a much-needed step-by-step toolkit for policy-makers on “how” to operationalise this approach through the policy design process using iterative and co-creation methods – from developing a clear vision and strategy focused on delivering collective wellbeing to evaluating and assessing policy impacts on wellbeing outcomes.

Following the guidance outlined in the “Playbook” will enable policy-makers to turn the goal of building a wellbeing economy into an implementable and realistic policy approach suitable for their own different contexts.

With its preventative approach, long term horizon and intergenerational perspective, implementing a wellbeing economy policy approach will help to shift short-term policy-making and build long-term societal resilience. By doing so it will ensure that faced even with today’s difficult choices there will be a better future for the next generation.

Dr Aileen McLeod

Dr Aileen McLeod is a Senior Adviser on the Wellbeing Economy. She is a former Member of the European Parliament representing Scotland (2019–20) and Minister in the Scottish Government for Environment, Climate Change and Land Reform (2014–16).

Foreword

It has been a joy collaborating with ZOE to support communities in Scotland, New Zealand, Canada, and the United States to begin piloting the Wellbeing Economy Policy Design Guide. As each of these communities engaged in deliberative processes to develop new visions of progress centered in social and ecological goals, ZOE's experience and expertise in distilling key lessons, challenges, and tools that can be used by other communities was invaluable and has been beautifully articulated in this playbook. ZOE is a leader in developing and applying innovative policy approaches across the EU and this playbook is a wonderful resource for any community or government interested in developing Wellbeing Policies.

Amanda Janoo

Amanda Janoo is the Economics and Policy Lead for the Wellbeing Economy Alliance (WEALL). Amanda is an economic policy expert with over a decade of experience working with governments and international development institutions around the world. Her work aims to build just and sustainable economies through goal-oriented and participatory policy design processes.

This playbook was developed with support from Wellbeing Economy Alliance and funding from Robert Bosch Stiftung.



Why policy design?

Today, governance is navigating uncharted waters. The number, diversity, and intersectionality of challenges we face requires policy design to match. The idea of a wellbeing economy presents an opportunity to re-orient our economic systems towards building an economy that puts people and planet at the core. Getting there requires not just tectonic shifts in policy, investment, ways of measuring progress, and values, but also shifts in how we design policy. This is explored in depth in the Wellbeing Economy Policy Design Guide and with illustrative examples on the digital version of this guide.

Wellbeing Economy Policy Design Guide →



<https://weall.org/policyguide>

Why this playbook?

This playbook is designed to be just that, a book to play around with, to support the process of designing wellbeing economy policies. It is structured to accompany the Wellbeing Economy Policy Design Guide and provide an operational structure and methods for delivering the processes described in the Policy Design Guide.

The pages that follow provide guidance, structures, templates, and canvasses to be worked with in the process of policy design. It will explore the steps of: laying the foundations for this process, developing a wellbeing vision, assessing and selecting wellbeing economy policies, implementing wellbeing economy policies, and finally evaluating policy impacts.

*Platform and tools provided in the digital version
of the Wellbeing Economy Policy Design Guide* →



[https://sustainable-prosperity.eu/
designing-policies-wellbeing-economy](https://sustainable-prosperity.eu/designing-policies-wellbeing-economy)

Laying the foundations

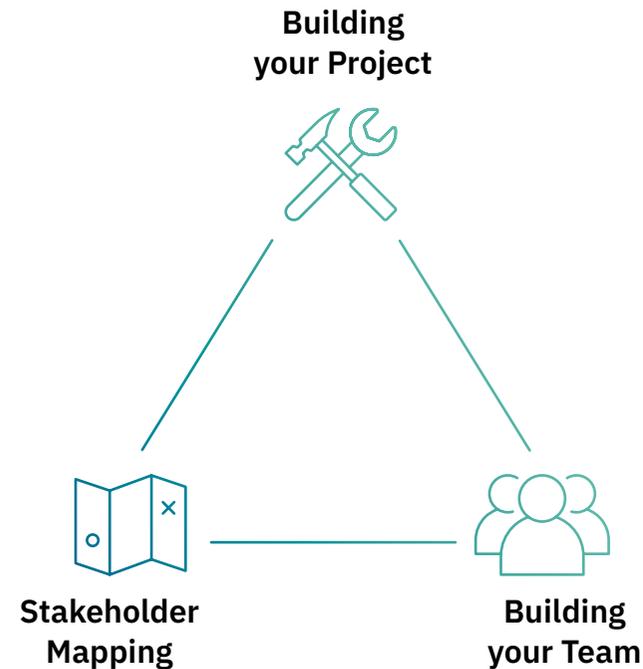


Laying the foundations

Just as with anything that we construct, building a wellbeing economy requires starting with solid foundations. The process described in this document can be challenging and take time, and having some structure, team, principles, and ecosystem to rely on along the way can keep the process going. In some ways these first three foundation-laying exercises—building your team, building your project, and mapping your ecosystem of stakeholders—are cyclical and iterative because one isn't fully complete without the other two.

A team which represents the diverse community needs and interests is important to design a project to build a wellbeing economy which the community buys into and which matches their aspirations and values. An understanding of the broader ecosystem of actors who are already working on building a wellbeing economy, and the perspectives and visions of the community, is needed to design a project and identify a team. And without a project structure or design, it is difficult to keep the process moving and focused or communicate about your project to be able to get communities interested in participating.

Because of this triangular foundation, the best place to start is wherever feels most natural for your context and starting place and then come to the other two.





Building your team

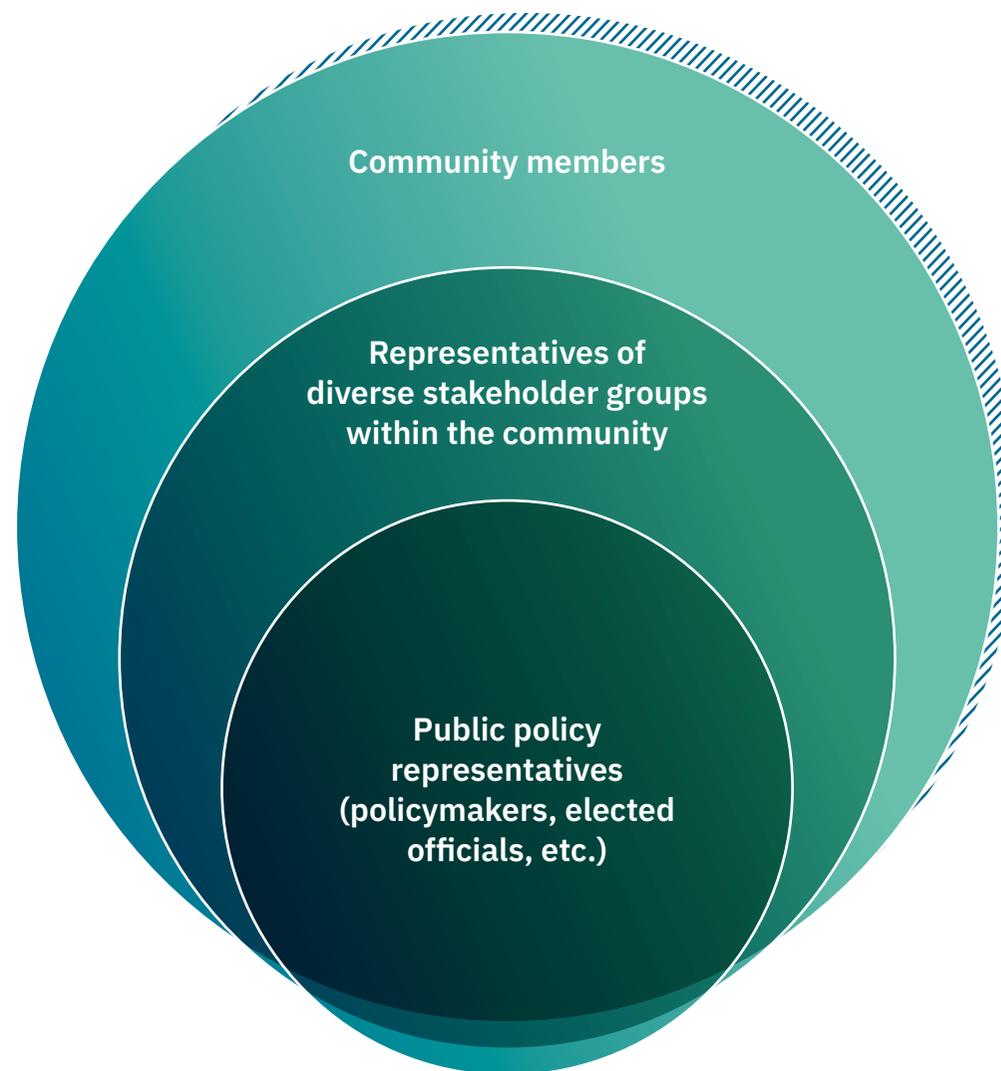
Undertaking the process of wellbeing economy policy design requires a team of people invested in seeing it through. It's also possible that there are multiple constellations of groups that are needed to work on different aspects of the process. However, it's crucial for the long-term success and resonance of the work that both policymakers and diverse stakeholders are a core part of the process and feel ownership of it. In a later section, how to ensure the support of different groups is explored.

Building and nurturing your team is an essential part of the process. This is true for multi-stakeholder teams as well as those within public policy. Nurturing your team dynamic so that people feel a part of the process and that the collaboration is supportive for engaging in some of the challenging conversations that come later in the process.

When reflecting on the diversity of skills and knowledge needed in the team, this resource can offer guidance →



www.sustainable-prosperity.eu/designing-policies-wellbeing-economy/identifying-stakeholders-and-building-relationships/assembling-your-team



Stakeholder groups that could be included in your team constellation.



Building your project

Clarifying what you are trying to achieve, with whom, and in what context at the beginning of any process can help to set the scope and also make clear where and how you are making progress along the way. This is especially relevant when the process can be complex and a long-term commitment.

When reflecting on the diversity of skills and knowledge needed in the team, this resource can offer guidance →



www.sustainable-prosperity.eu/designing-policies-wellbeing-economy/identifying-stakeholders-and-building-relationships/assembling-your-team

Fill out this Canvas!



What is the aim?

How will you iterate on your aim with your community?

What is the context you're working in? What are the relevant policies and stakeholders for this work? What cultural and institutional norms are important to consider? etc.

How will you measure what you have achieved?

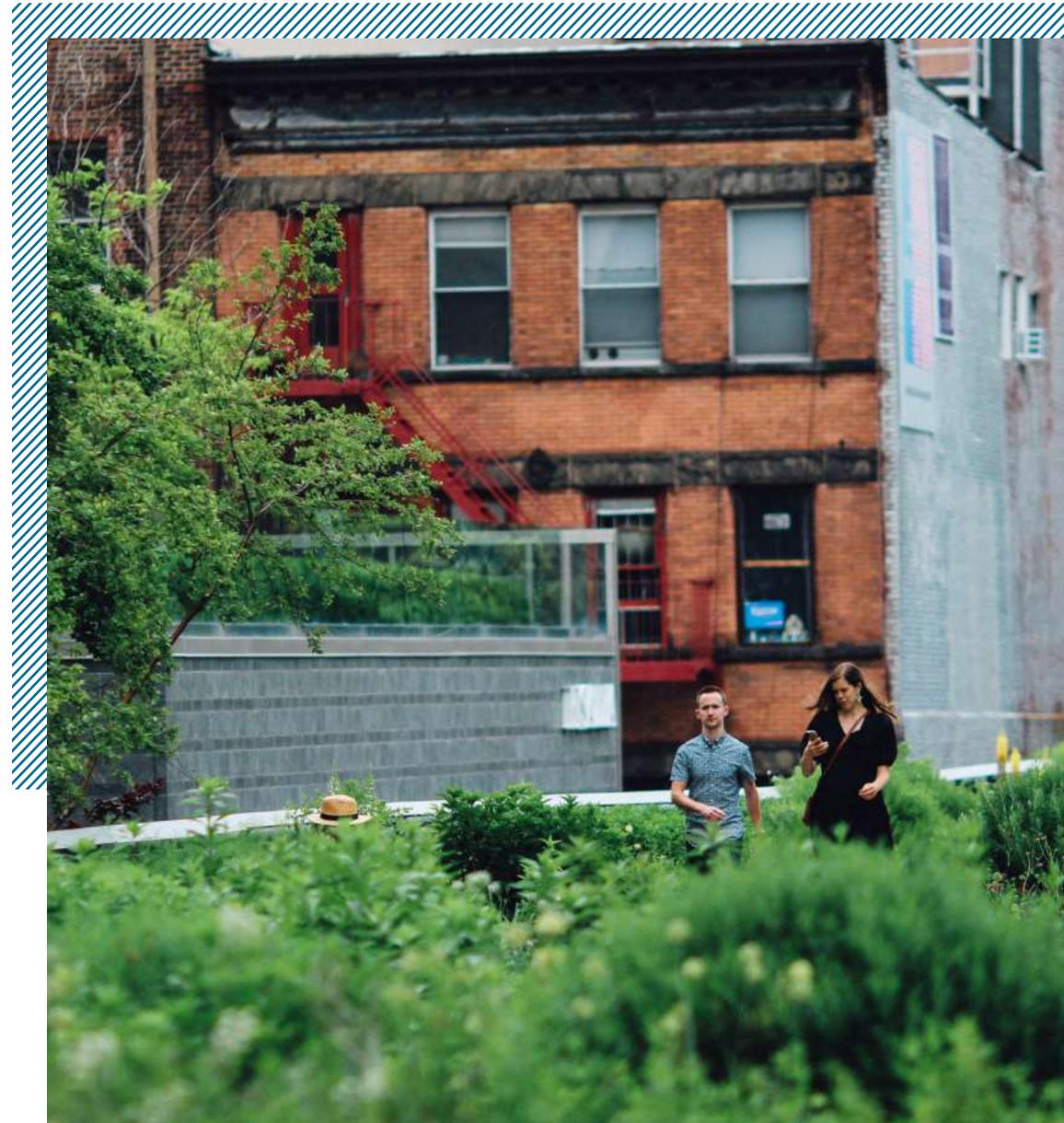


Stakeholder mapping

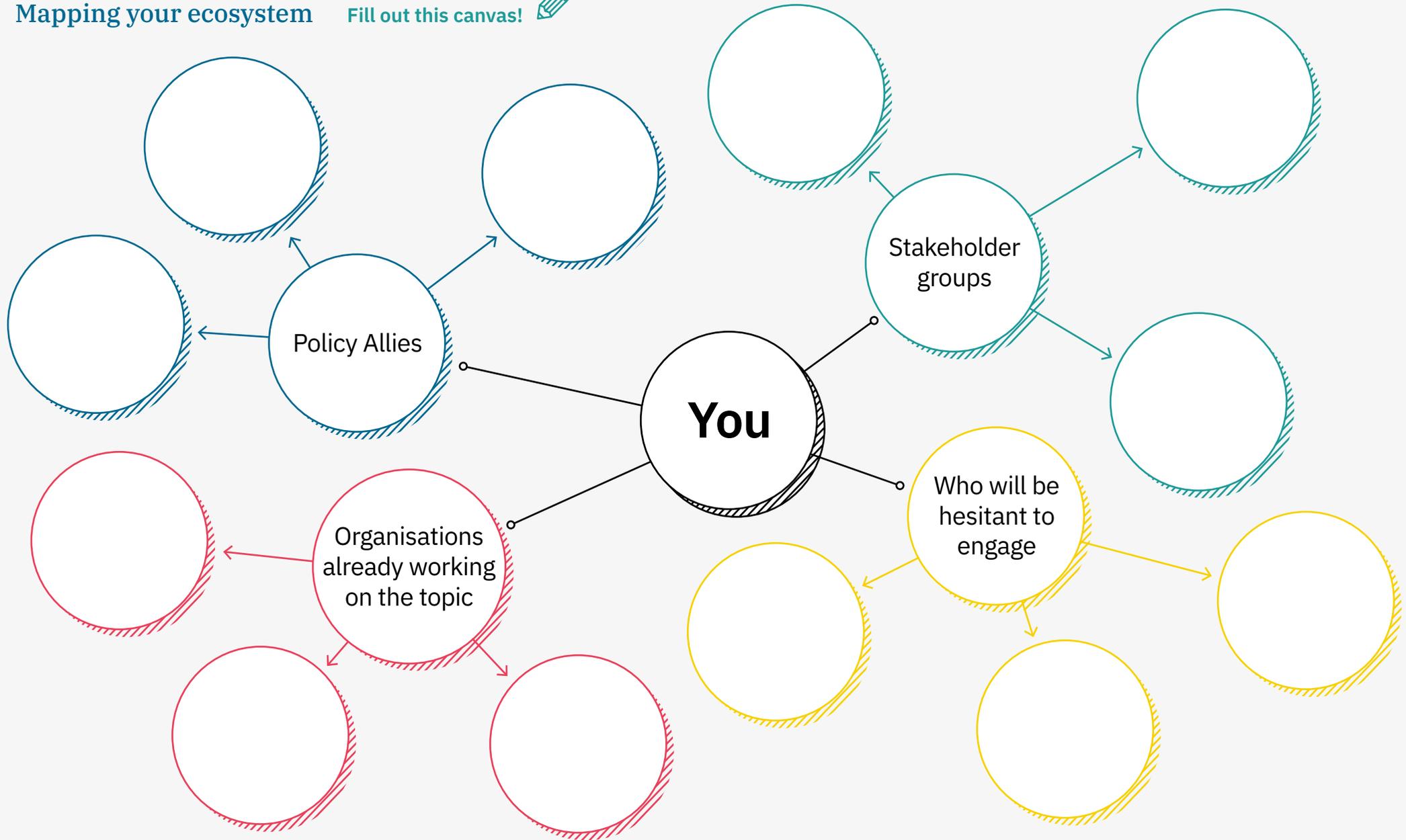
Participation is essential for a wellbeing economy. It is important to map out and understand community stakeholders and partners early on in the policy design process in order to develop valuable connections, build trusted relationships and gain a diversity of perspectives needed to develop policies that work and are accepted in the long term.

Stakeholder mapping and relationship building are two different, yet complementary things. While the goal of stakeholder mapping is to understand the ecosystem within which you operate, relationship building involves creating connections and building trust with those building the wellbeing economy with you. The scope of these two aspects goes beyond building a network of support, strengthening the ecosystem, and getting buy-in from different aspects of society. It is also about recognising the value, contributions, and history of other actors and how you relate to them and their work.

Understanding and navigating your relationship with stakeholders is a constantly iterative process. At this early stage, it is most important to understand your ecosystem. Who are your allies, inside and out of government; who may resist this work; who may have specific needs or bring perspectives that needs to be considered? Through the following sections there are three places where we come back to the topic of stakeholders for different purposes.



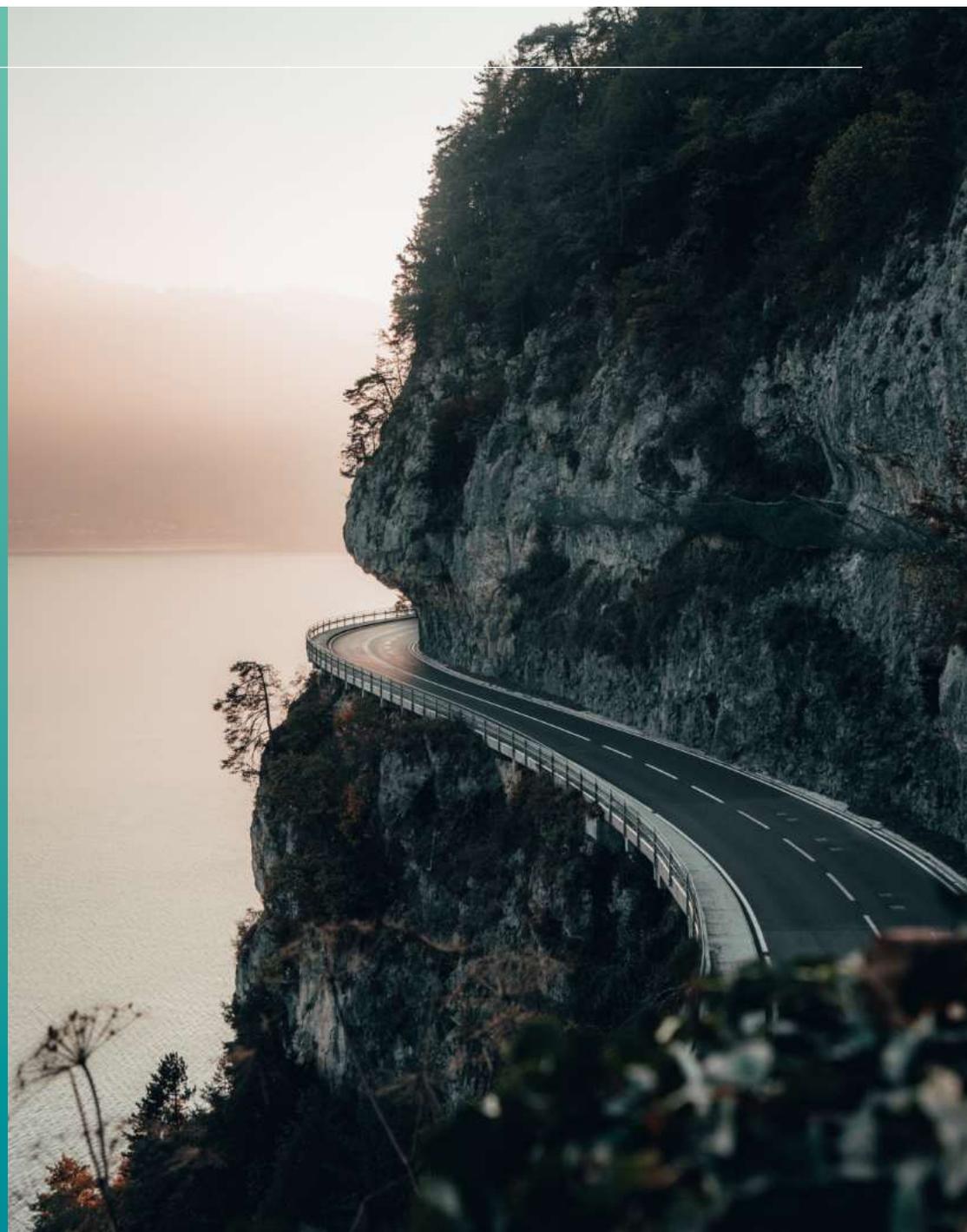
Mapping your ecosystem Fill out this canvas! 



Instructions:

Identify the people, organisations, and institutions that matter for this work and how they connect and relate to the work.

Developing a wellbeing vision



Developing a wellbeing vision

Developing a vision for what a wellbeing economy looks like for your context is an important early step in the process of wellbeing economy design. This initial step opens up the prospect for positive visions of what a wellbeing economy could be which provides inspiration for defining a strategy and goals necessary to decide on concrete policies. Visioning processes are an important early phase to take a multi-stakeholder and co-creative approach and build on the stakeholder map suggested in the earlier pages.



What is co-creation ?

Co-creation is an interactive and insightful method for engaging stakeholders in different parts of the policymaking process. A co-creative workshop uses a two-way communication style; while someone should still moderate, all parties share, exchange, and discuss ideas actively. The group goes through the process together and creates the expected result of the workshop. The expected result—the goal of your event—should be determined ahead of time. This could be, for example, co-creating new policies for a wellbeing economy.



By promoting meaningful participation, this method works towards creating ownership among participants. Stakeholders can incorporate their ideas into the process of transitioning to a wellbeing economy as they co-create what this could look like. It is important to ensure diversity of participants in your workshop. This not only encourages creativity and ensures representativeness, but also brings expertise in different fields and realities necessary to deal with complex challenges.

At the beginning of a co-creative workshop, many different ideas appear; here it is important to allow for individual brainstorming. Participants share their visions and alternatives and begin to uncover the complexity of the issue at hand. Next, they depart from the ideas gathered and begin to make sense of them. Participants identify key points and co-create a cohesive set of conclusions, so it is important to have space for debate in which guiding questions and prioritisation grids can help—examples are included in the following pages. The tools available here can also support

on selecting the policies which fit best. What will emerge at the end of the workshop depends on what was defined as the goal of the process. It might be a comprehensive understanding of what wellbeing means to your community, or a set of policies to achieve a wellbeing economy.

It is natural for conflicts to arise between different stakeholders in the room due to differences in their existing knowledge, worldview, personal preferences, and so on. You should be sensitive to that. It is important to create a safe space and build trust among participants, and there are many actions that can be taken to make everyone feel comfortable. The moderator can reframe the challenge in a way that it is shared or bring up questions to shift the focus away from the point of tension and toward a broader picture where there is agreement. Another option is to purposefully encourage other participants to share their perspectives, making it easier to navigate an intermediate solution.





Visioning process

Before developing your strategy and policies for a wellbeing economy, you need first to define what wellbeing means in your context. A wellbeing vision is not something that can be imposed—to achieve a shared understanding, you need to engage with the community to imagine the future and identify what wellbeing means to them. There are various approaches to this, such as community forums, public consultations, and surveys. The co-creation method described above is also an effective way to ensure participation in the process. On the right side we present a suggested agenda for a visioning session.

Canvasses in the following pages can also help visualise and support these interactive exercises.

Topic	Process description
Opening & objectives	Present the structure and explain the goals of the visioning session
Introductions of people	Everyone introduces themselves and their motivation to be there
Visioning exercise	Allow some time for individual reflection on what wellbeing means for people and what aspects are most relevant for them
Sharing your vision	Group participants into small groups to share and exchange their wellbeing vision. Small groups make people more comfortable to join the conversation and ensure everybody has time to present their view.
Don't forget to take a break!	
Sharing your group vision	Invite the groups to present their shared wellbeing vision with the whole group. Discuss the visions, give time for questions, get comments and reflections.
Iceberg Model exercise	Based on the visions, create wellbeing scenarios. For this, you can again divide participants in smaller groups. The Iceberg Model is one way to guide the exercise. On the next page, find below a step-by-step tool on how to do this.
Presentation of Icebergs & Discussion	Bring the whole group together and invite each group to present their scenarios. Allow time for discussion. Specifically bring in critique from diverse stakeholders. Set prompt questions like: who is excluded? For whom is this positive or negative?
Defining scenarios	With the scenarios in mind, guide the group to reflect on their relation to the current state. Get agreement on what are the preferred scenarios to move forward with.
Concluding remarks	Wrap up what the group achieved, what are the wellbeing scenarios chosen, and how this will be used to create your shared wellbeing vision

Guided visioning exercise: Example 1 Fill out this canvas!

Imagine you're living in a wellbeing economy: what does it look and feel like?
Use the prompts below to guide a visioning exercise with a multi-stakeholder group.

**What surrounds
you physically?**

**How do people
interact?**

**What do you sense?
See? Smell? Touch?**

How do you feel?

**What do people
spend their
time doing?**

Instructions for the exercise:

Participants should imagine living in a wellbeing economy in 2050, describe the surroundings. Please use also descriptive icons, metaphors or symbols of a broader society (e.g. girls riding bikes to school shows cycling infrastructure, education, safety, gender equality, etc.).

Guided visioning exercise: Example 2 Fill out this canvas! 

What does wellbeing mean for you?

What adjectives would you use to describe?

What needs and rights are met and satisfied?

What does wellbeing mean for all?

What adjectives would you use to describe?

What needs and rights are met and satisfied?

Instructions for the exercise:

Participants should describe the intangibles of living in a wellbeing economy, both regarding their personal experience of it and what it means for all.

Group exercise: What assumptions are behind these lived experiences?

Fill out this canvas! 

1. Events

Evidence, symptoms

What we see right in front of us?

1.

2. Patterns of behaviour

Rules, practices, trends, patterns

What trends are there over time?

2.

3. Systems structure

Organisations, laws, structures of power, relationships

What influences the patterns/trends?

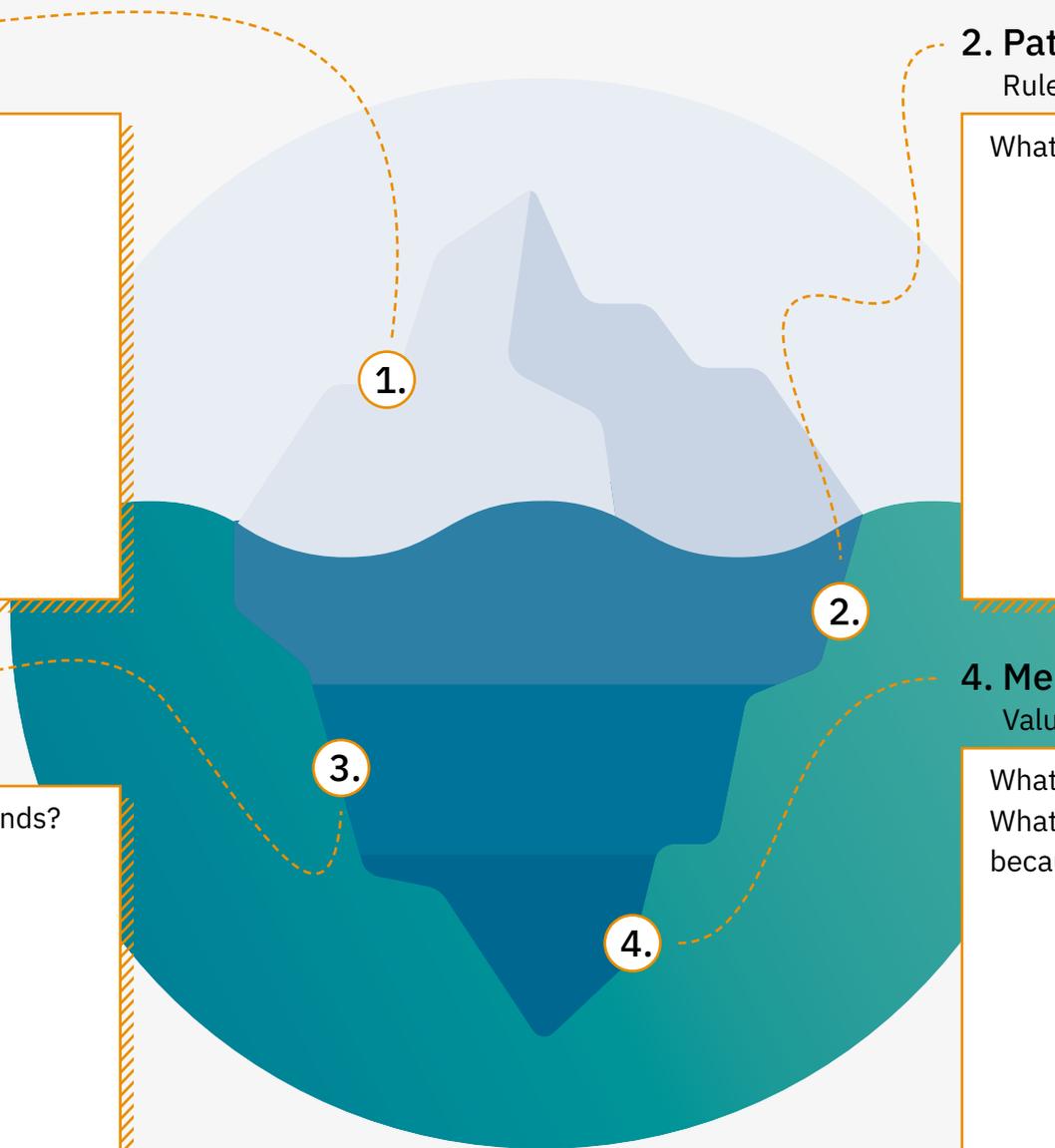
3.

4. Mental models

Values, assumptions, beliefs, traditions

What keeps the system in place?
What community assets are hidden because we don't know how to look?

4.



Designing a wellbeing economy strategy



Designing a wellbeing economy strategy

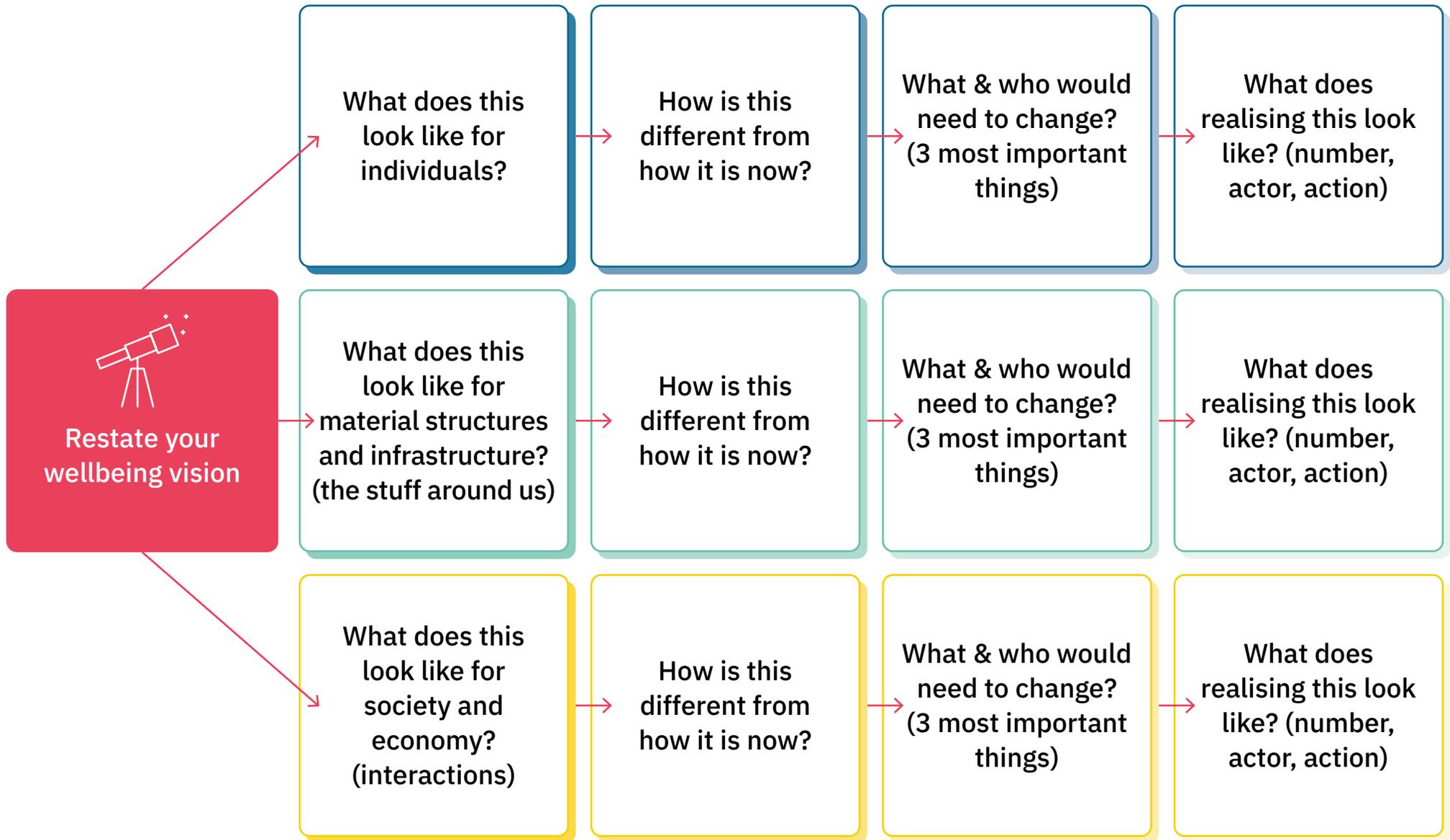
As with any change process, a strategy is needed to define what is trying to be changed, how that will happen, and who needs to be a part of it. This strategy should use the vision from before as the end result that is being worked towards and identify the change process to get there.

Creating goals from visions

Operationalising a vision into specific goals around which to design policy and orient a wellbeing economy strategy is one of the most crucial steps of this process. It is essential for a vision to be translated into specific, measurable goals to support and inform the rest of the process. This process should involve identifying what needs to change, by whom, and how much. This is a crucial first step to being able to identify policies. However, sometimes the important activities here are not policies, but actions by other actors. A final step of this process should also be to reflect on whether the change needs policy action, or action by another actor. If it's the latter, it should be saved and collected for the action pathway process.

The template below should be used for a facilitated group workshop, which should include perspectives from different disciplines. This can either be done in a participatory multi-stakeholder way or involve individuals from different departments and policy areas internal to a government.





Assessing & selecting wellbeing economy policies



Assessing & selecting wellbeing economy policies

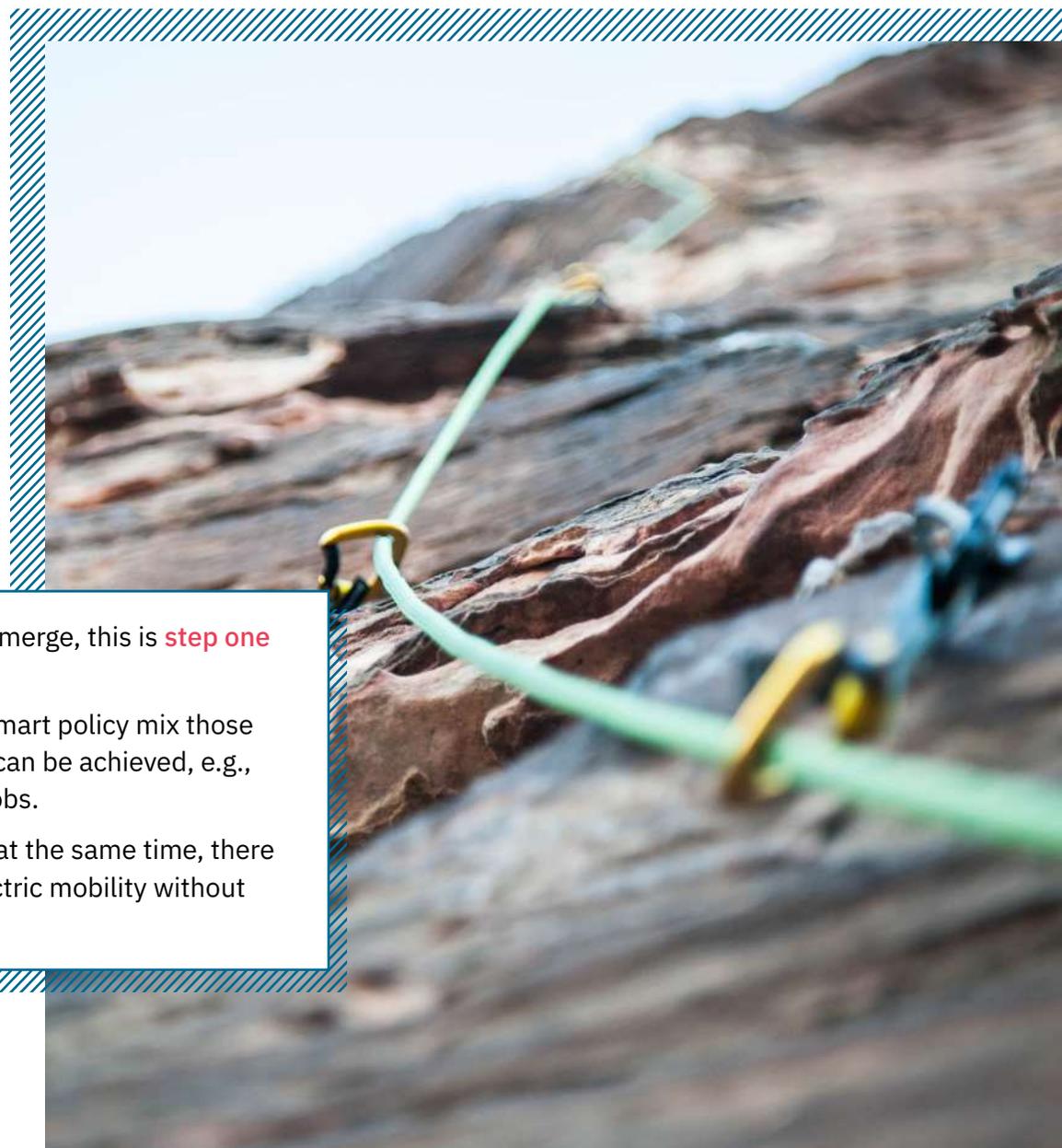
Now that your wellbeing vision has been co-created and you have developed a strategy towards a wellbeing economy, it is important to look at policies that can operationalise this path. With the right group of policies, you can help to shape activities, behaviours, and the economy so that they work towards social and ecological wellbeing.

It is important to assess and select policies that are most aligned and enable delivery of your strategy and goals. This often entails a high level of complexity and considering a mix of policies, rather than one policy. In addition, policy goals interact with one another and pursuing one might hurt another.



To navigate through the interactions that emerge, this is **step one** to differentiate tensions from trade-offs:

- Some goals can be in **tension**, but with a smart policy mix those tensions can be overcome and both goals can be achieved, e.g., decreasing CO₂ emissions while creating jobs.
- If two goals definitely cannot be achieved at the same time, there is a **trade-off**. E.g., increasing share of electric mobility without increasing use of raw materials



There could also be tensions and trade-offs between policy instruments; a subsidy for the coal industry may keep employment in the sector stable but is detrimental to CO₂ reductions. While tensions require careful consideration when designing concrete policy instruments, trade-offs require a clear prioritisation of goals and decision making.

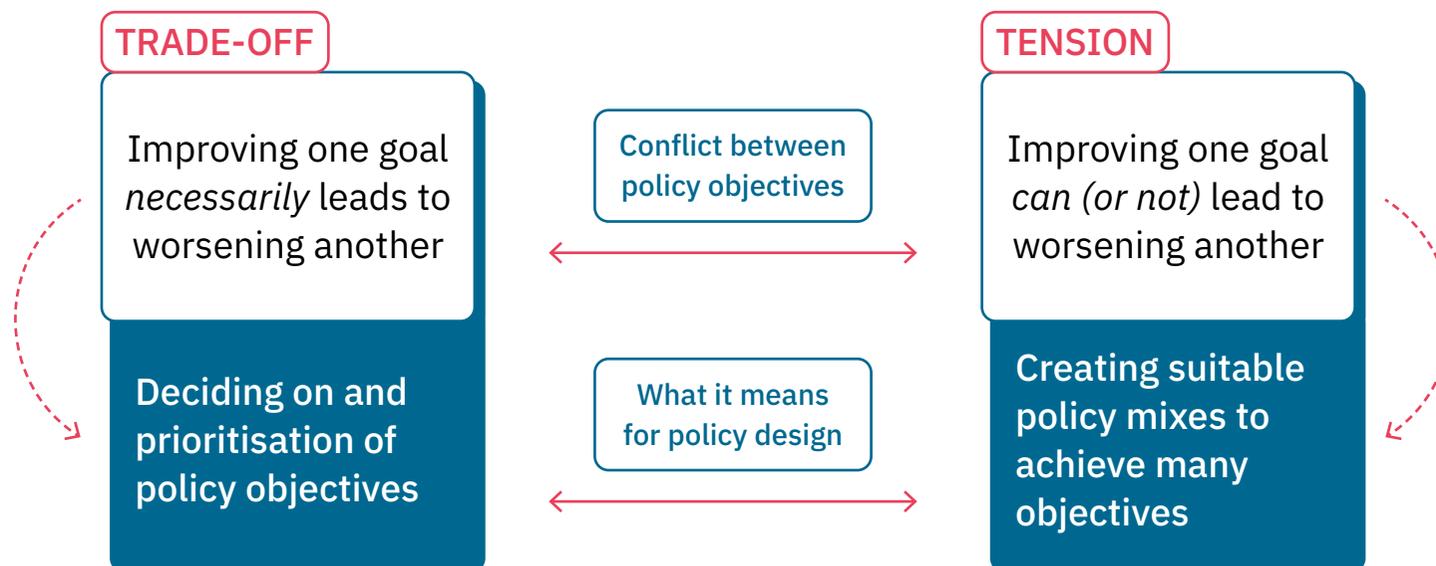
Prioritisation is a necessary part of the policy design process, as some conflicts cannot be overcome and need courageous decisions. Besides, it is not politically feasible to implement various policy changes at the same time. A way to define priorities is by assessing them against their potential for impact with respect to the feasibility of their implementation. This logic can be used both for policy goals as well as policy instruments.

A **second step** in dealing with interactions is looking at changes to existing policies. Keep in mind that, depending on its features, one single change can contribute to more than one goal. When thinking about changes, try to be as specific as possible. Being concrete helps you to understand what policies can support the change. This is exactly the next step:

A **third step** is to identify policies that should be added to the existing policy mix. While doing this exercise, also evaluate your current policies. Some existing policies might have a negative impact on your wellbeing goals; identify those that should be phased out in order to foster transformation. Decide based on the prioritisation of goals whether the identified policy changes should be adapted. Lastly, consider: can you identify a policy mix that achieves the same goals with fewer tensions?

A successful process of assessing and designing wellbeing policies depends on collaboration with community and stakeholders. It is also important to get buy-in and ownership from governmental actors. This requires prioritising who the relevant stakeholders are to engage with and who can support this.

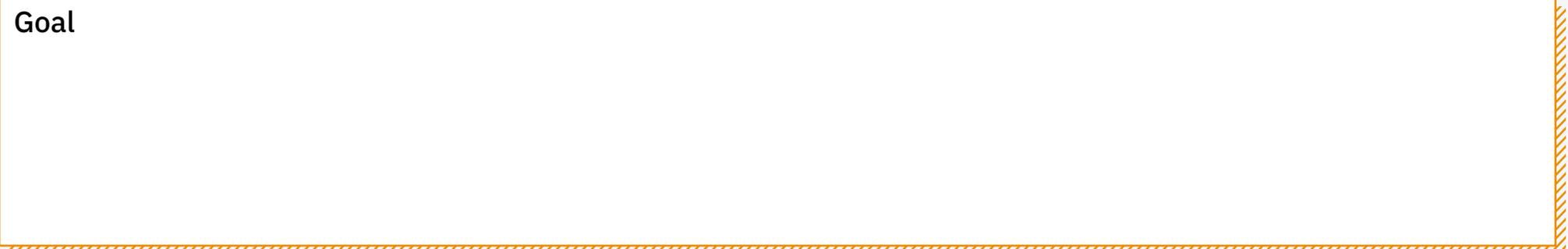
The process described here is supported with the following templates.



Policy assessment canvas → Getting started Fill out this canvas!

In this canvas you will identify goals for your policies, the real world changes you seek for them to have, and the policies and policy mix needed to reach these goals. The following canvasses are steps along the way of the policy assessment processes needed to identify a mix of policies for building a wellbeing economy.

Goal



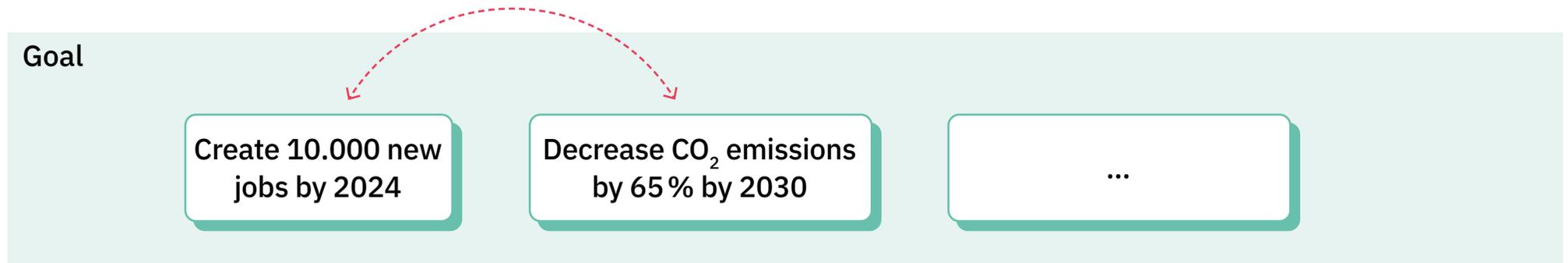
Changes



Policy



1. Policy assessment canvas → Identify potential tensions



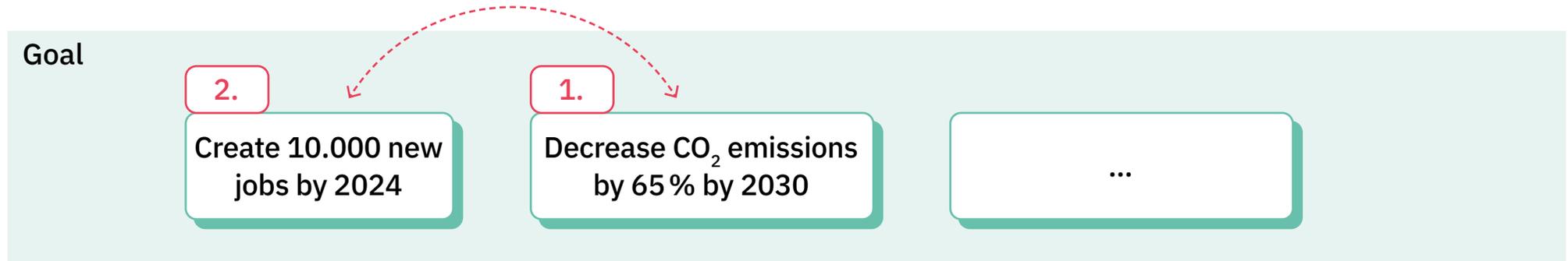
Instructions:

- First identify your goal, this should be context specific, have a clear deadline and a clear target.
- Next identify ways in which your goals might have tensions or conflicts between them.

A note on tensions:

- Tensions are not trade-offs. Some goals can be in tension, but with a smart policy mix those tensions can be overcome and both goals can be achieved (e.g., decreasing CO₂ emissions while creating jobs with a good policy mix).
- If two goals can definitely not be achieved at the same time, there is a trade-off (e.g., increasing wages across the economy while decreasing inflation: if wages go up, prices go up).
- Tensions require attention when designing concrete policy instruments.
- Trade-offs require prioritisation and decisions.

2. Policy assessment canvas → Prioritise Goals



Instructions:

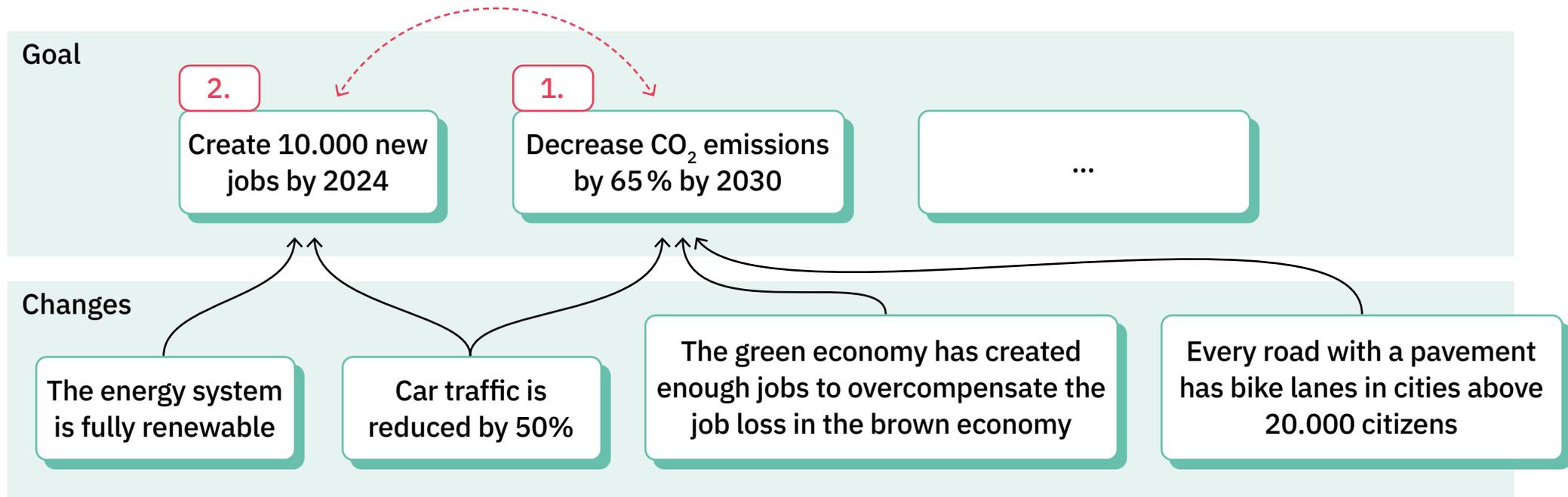
→ Prioritise your goals through multi-stakeholder discussion to support making difficult decisions later.

Note:

→ While there can be tensions and trade-offs on the level of goals, there can also be tensions and trade-offs between different policy instruments. E.g., a subsidy for the coal industry might keep employment in that sector stable, but it is detrimental for the reduction of CO₂ emissions.

→ To deal with all trade-offs it's crucial to have a clear prioritisation of goals to be able to make decisions later in the process.

3. Policy assessment canvas → How to reach your goals



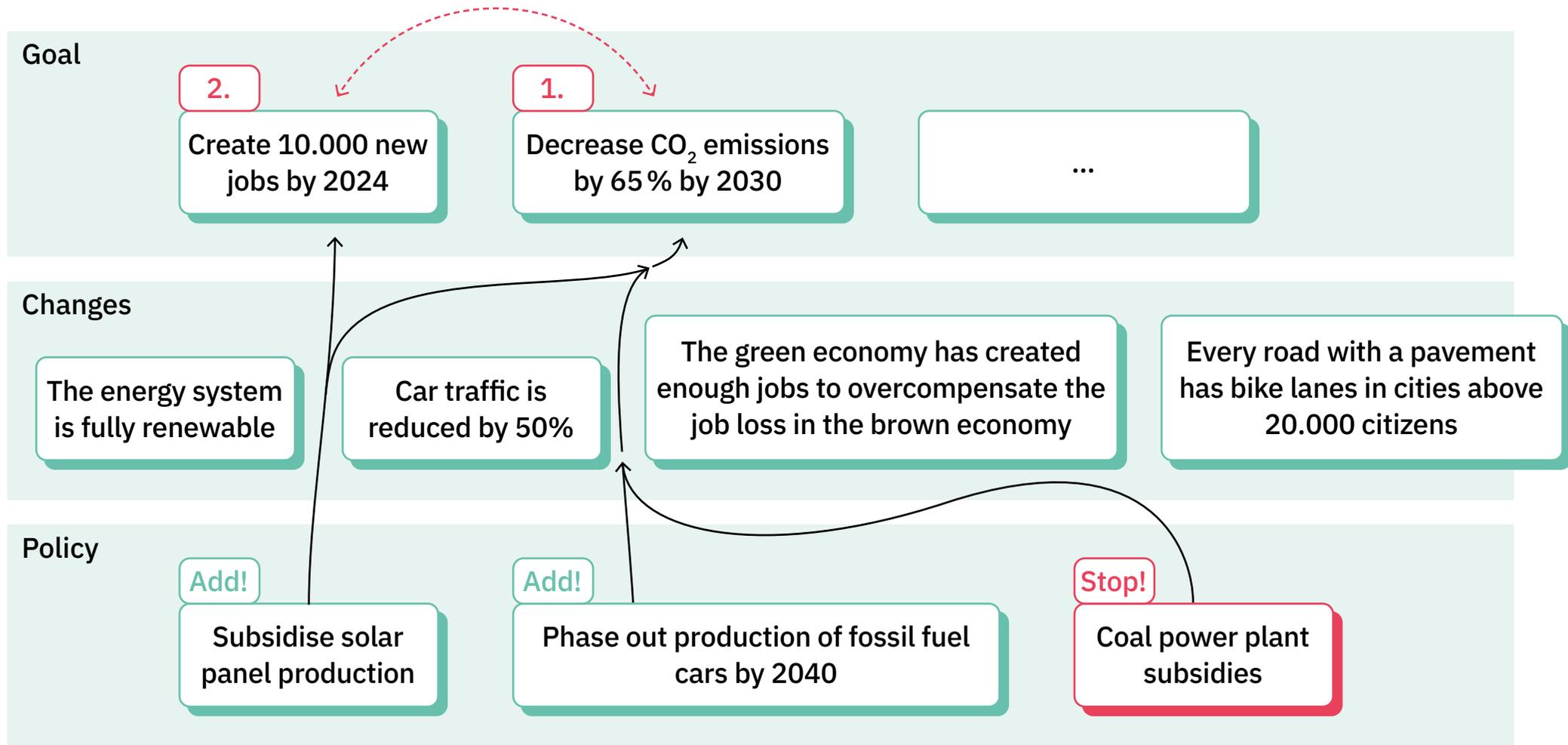
Instructions:

- Identify what changes need to take place in order for you to reach your goals.
- Probably it will require multiple changes which relate to one, some, or all of your policies.

Note:

- Some changes can contribute to more than one goal.
- Changes should be expressed as explicitly as possible.

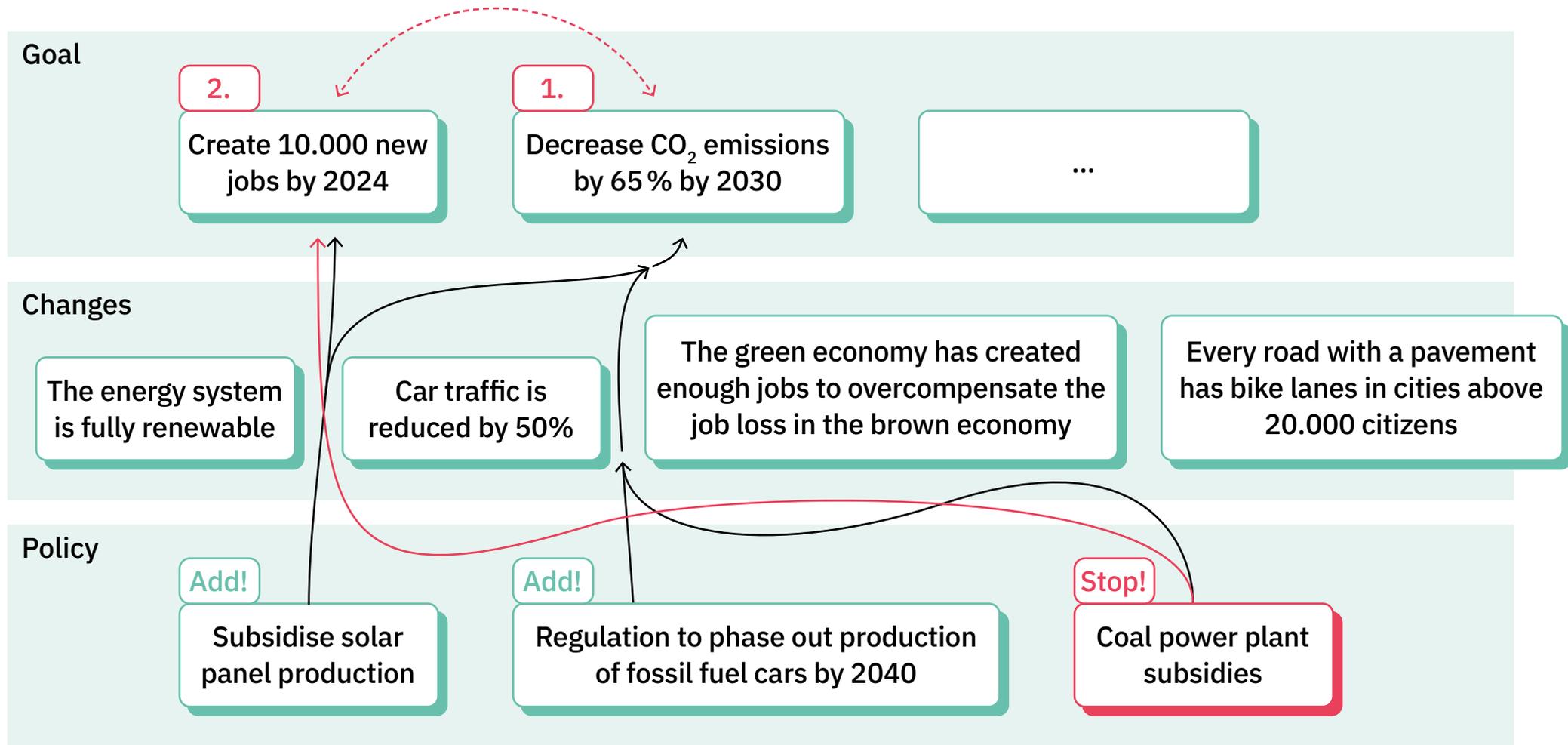
4. Policy assessment canvas → Defining the policy mix



Instructions:

- In a next step identify what policies are necessary to make the changes to be able to realise your goals.
- Existing policies should be added to the policy mix, but policies which need to be phased out to achieve the goals should also be added here.

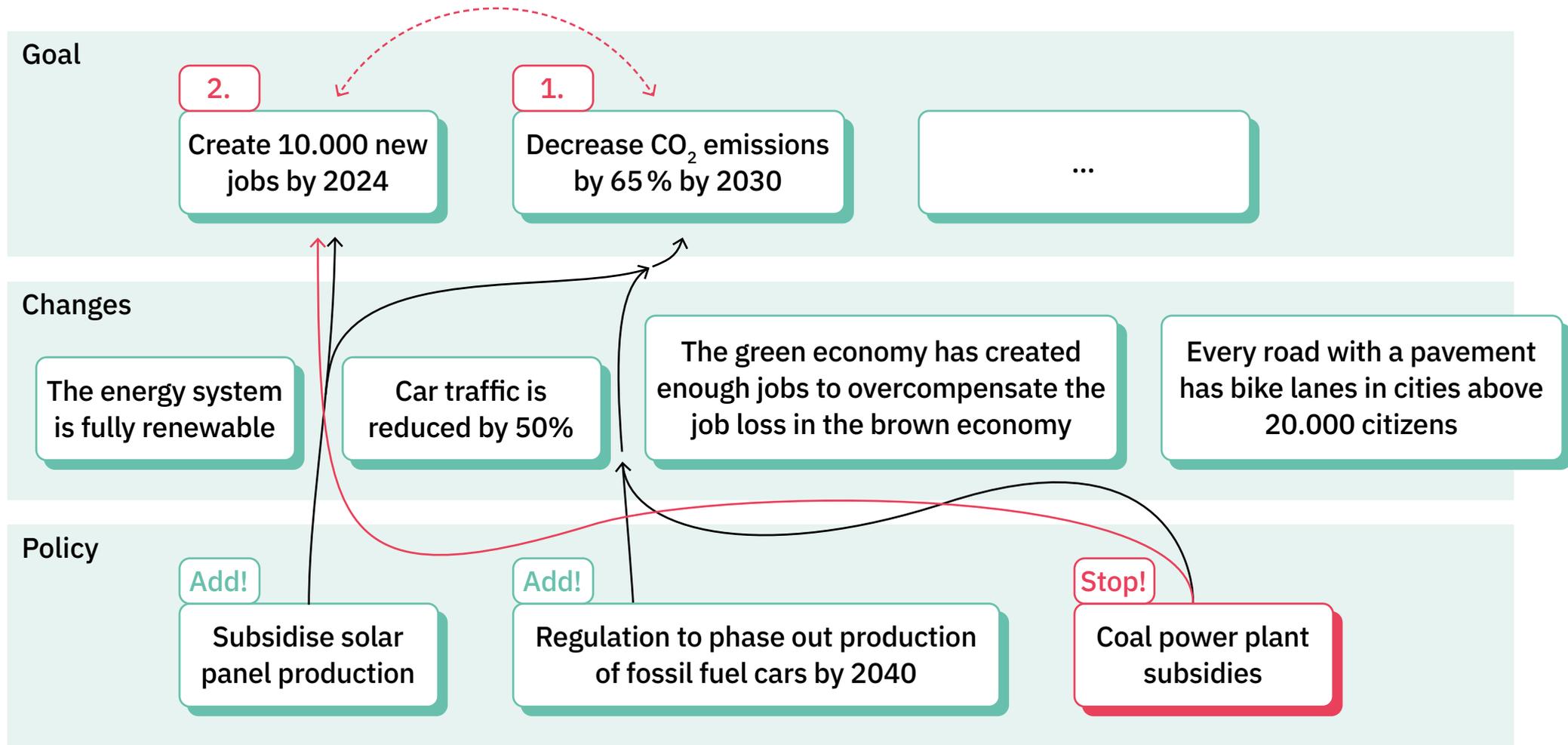
5. Policy assessment canvas → Identify policy tensions



Instructions:

→ Identify where there are tensions between different policies and goals. Some policies might have negative effects on some goals; these should be identified and discussed at this stage.

6. Policy assessment canvas → Deciding policy changes



Instructions:

- Decide based on the prioritisation if the identified policy changes should be adapted. Can you identify a policy mix that achieves the same goals with fewer tensions?
- Prioritisation will always be a necessary step; some tensions can't be overcome and need courageous decisions.

Policy assessment canvas template Fill out this canvas!

Here's a blank template for you to use.

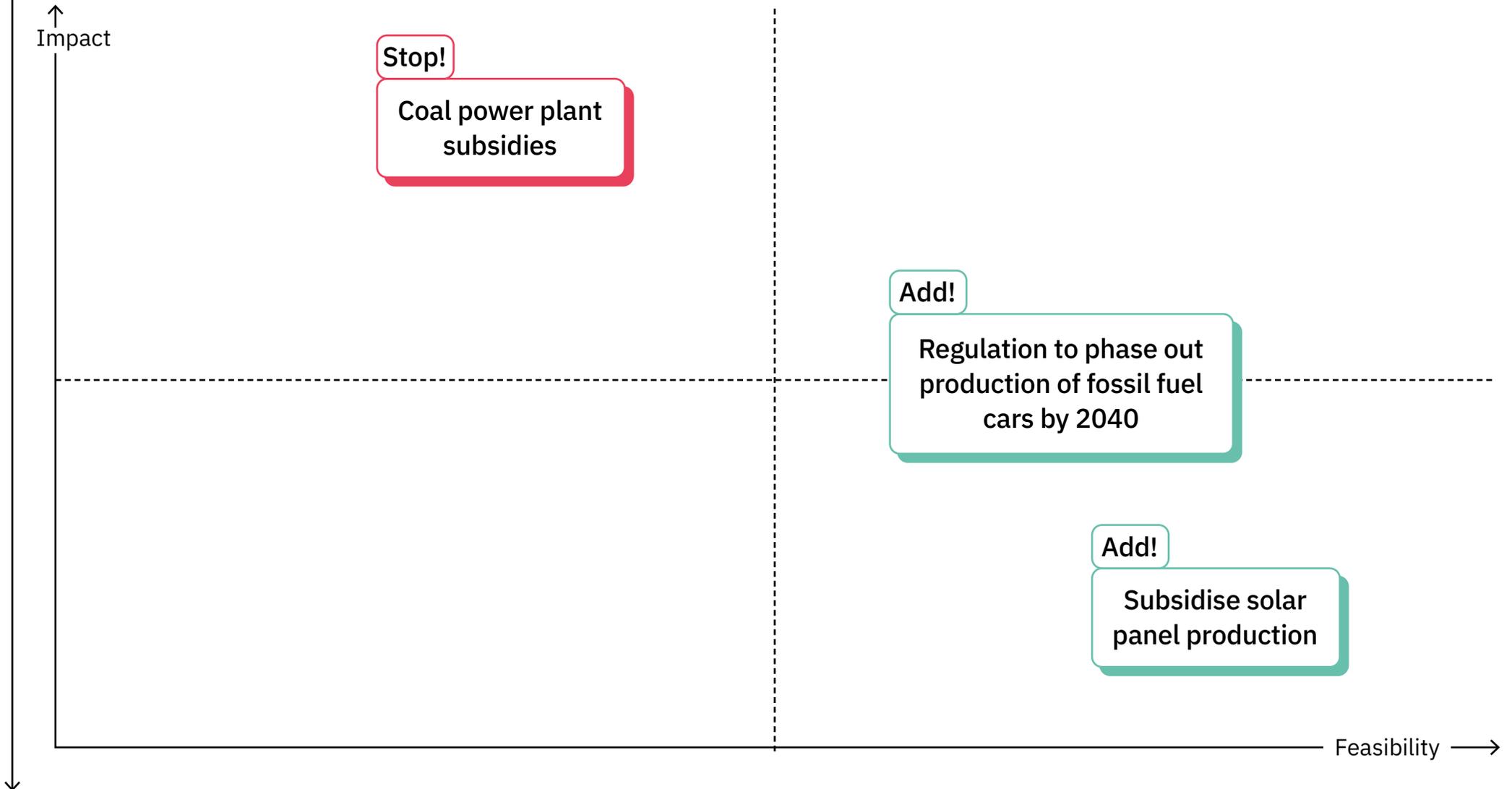
Goal

Changes

Policy

Mapping the impact and feasibility of policies

- As it is not feasible to implement many policy changes at the same time, so it's important to prioritise what to focus on first. Structuring the proposals by how impactful they are with respect to the goals and how feasible it is to implement them can help make those decisions.
- Top right corner = sweet spot.
- For a more detailed analysis, this can be used for each goal individually and can also help with the prioritisation of policies.

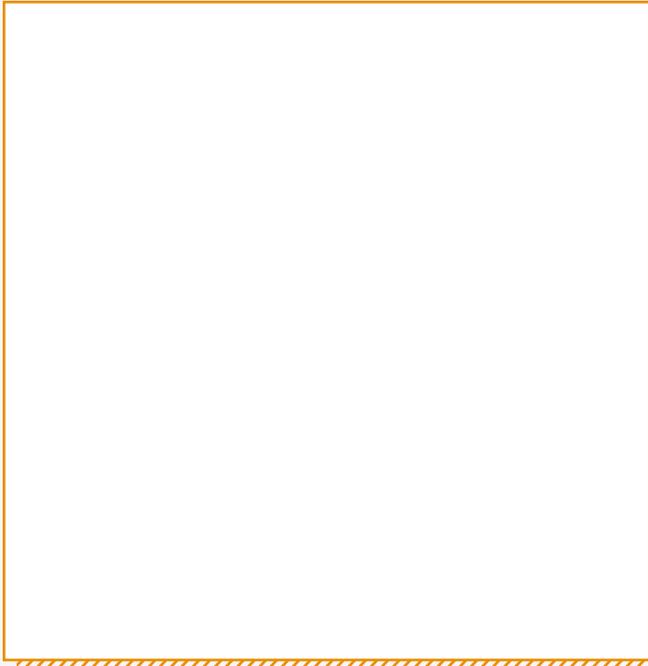


Stakeholder mapping → Identifying relevant stakeholders

Fill out this canvas! 

With this canvas you can identify relevant stakeholder per policy

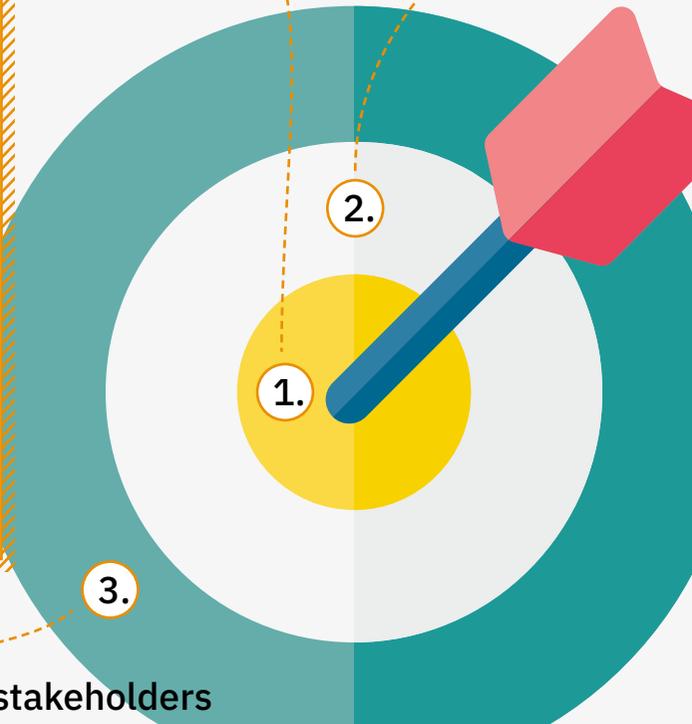
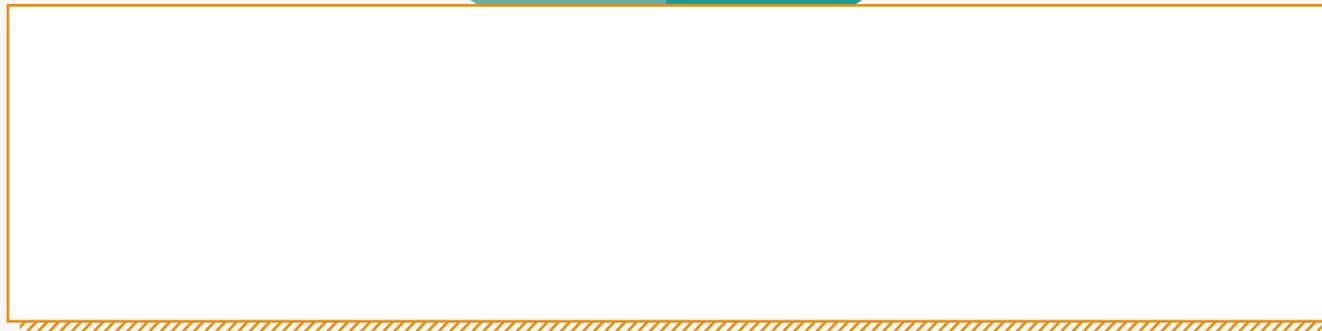
1. Policy



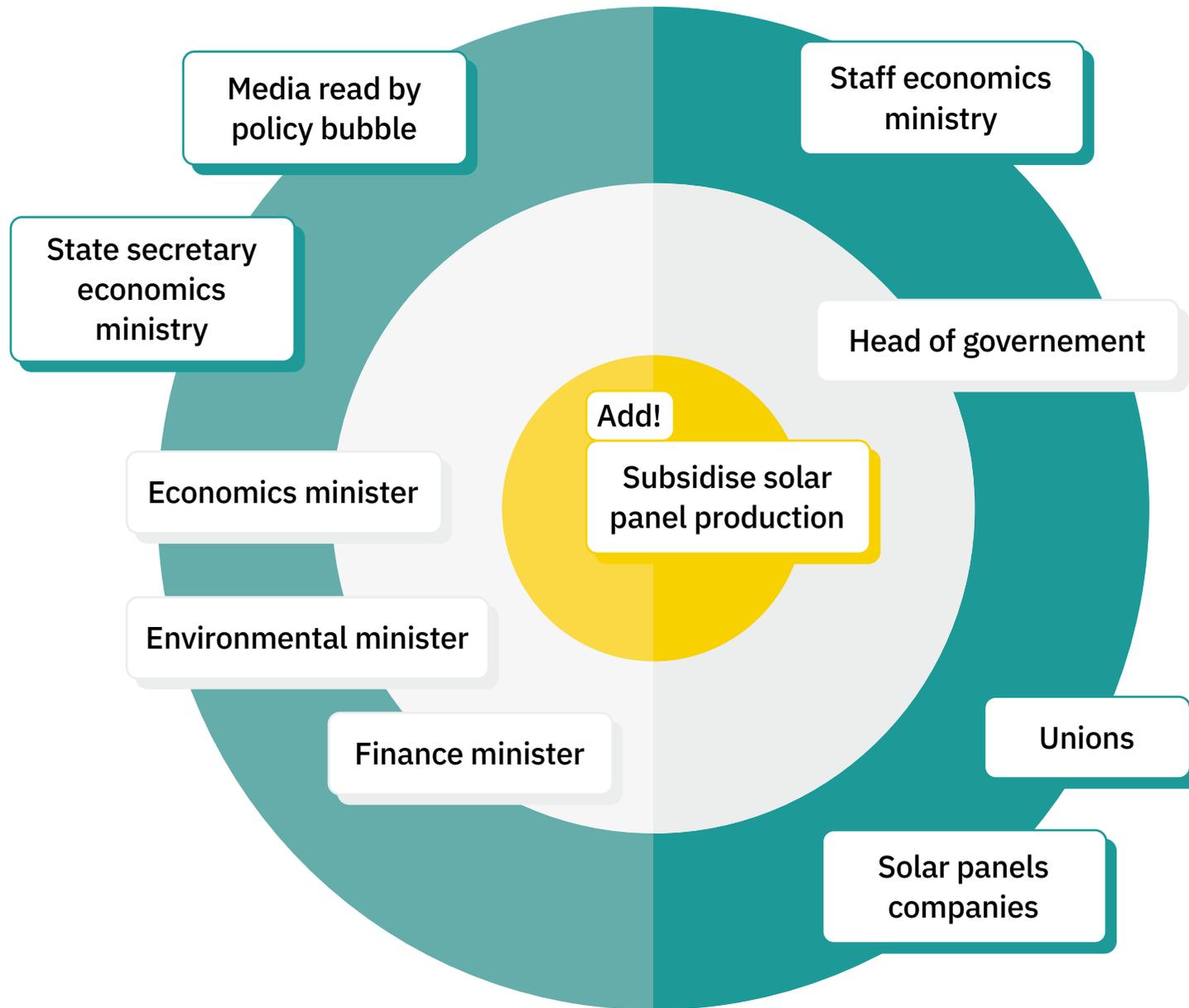
2. Key stakeholders



3. Other relevant stakeholders

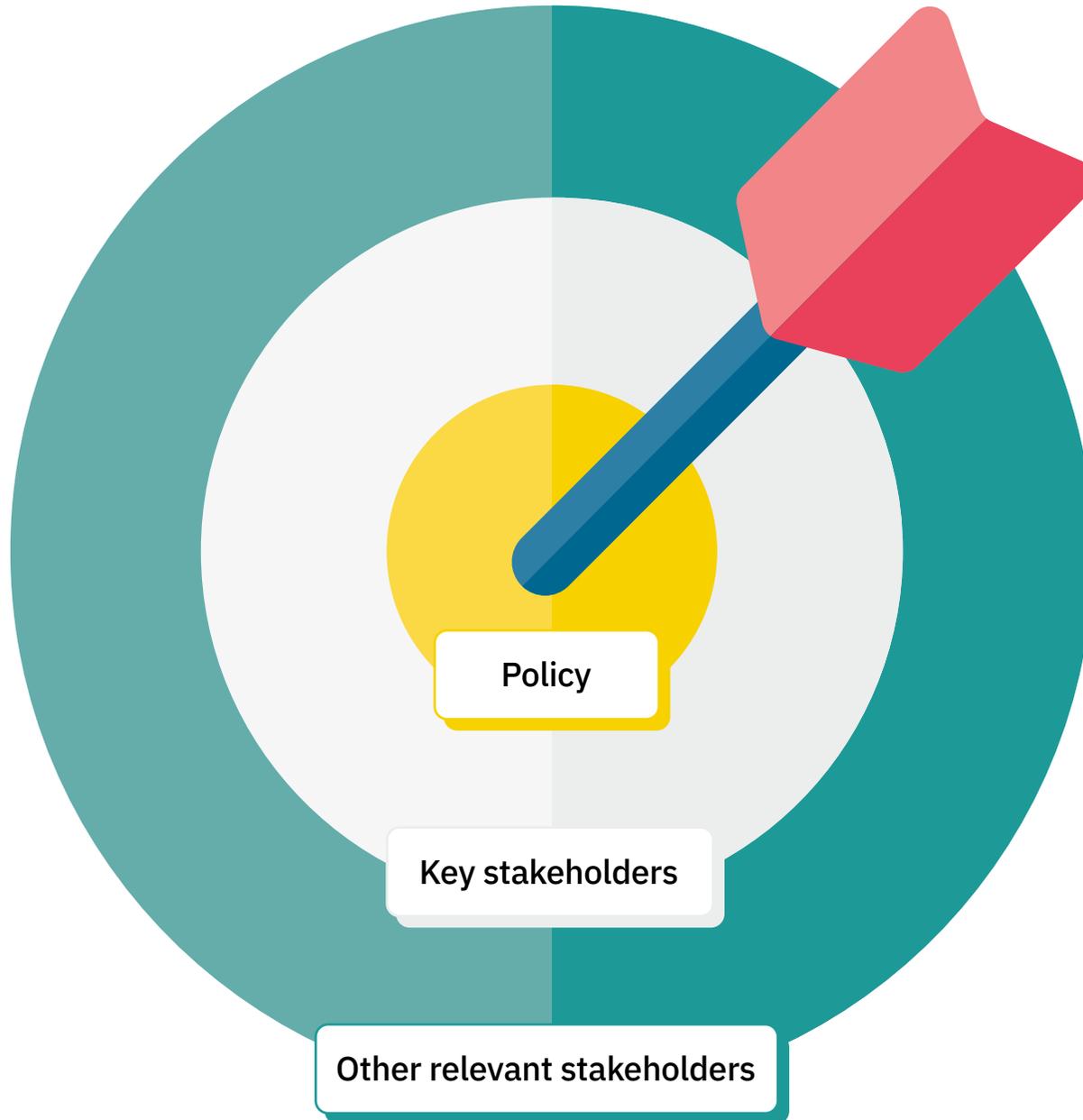


Stakeholder mapping example based on the policy mix above



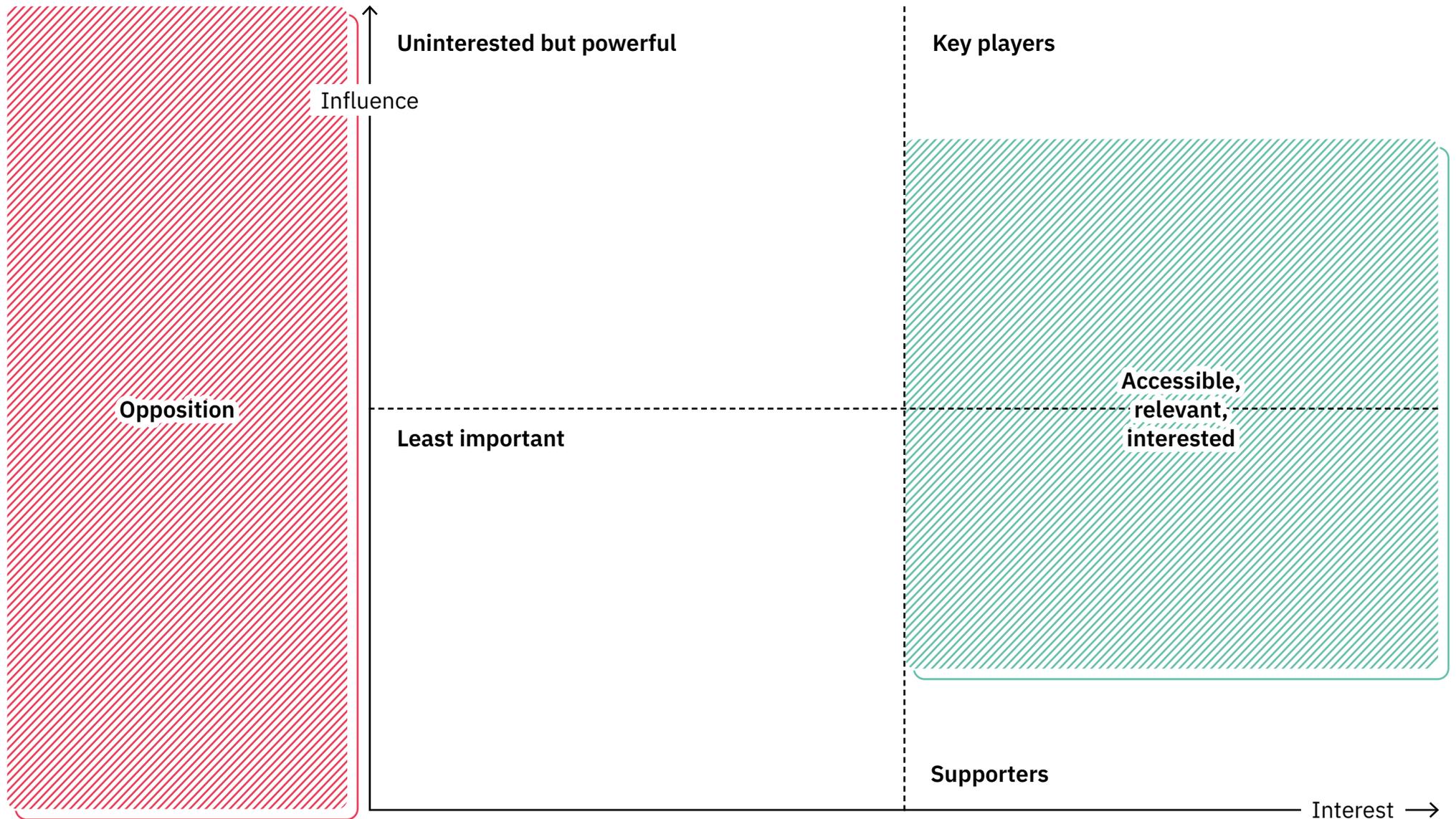
Identify relevant stakeholders per policy

Blank template to use.

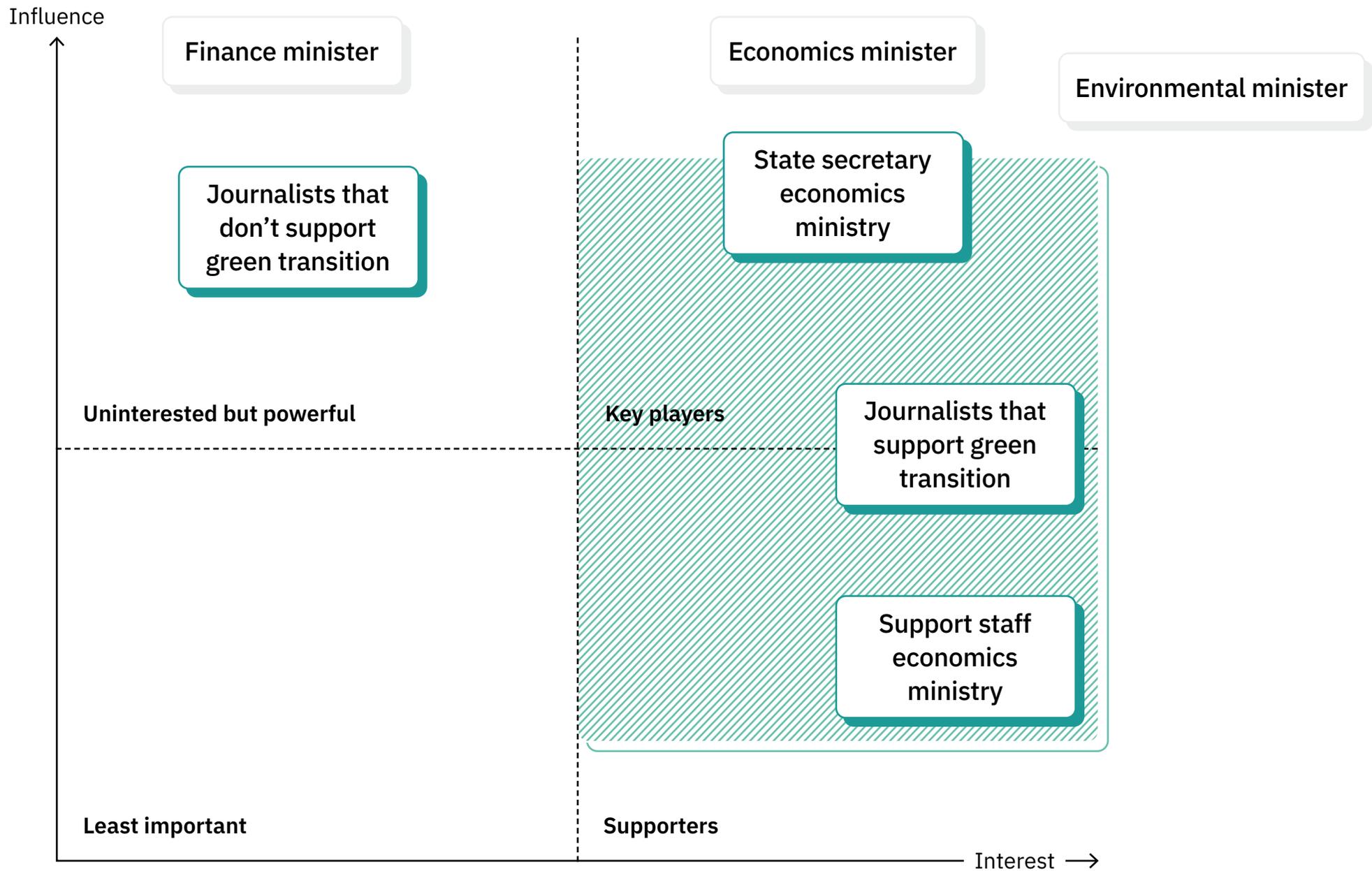


Stakeholder mapping → Prioritise stakeholders

Map your stakeholders according to their interest in your topics and their influence to create change. Its a good idea to also include actors you imagine to oppose the changes you seek to make.



Prioritise stakeholders and example based on the example policy assessment above.



Implementing wellbeing economy policies



Implementing wellbeing economy policies

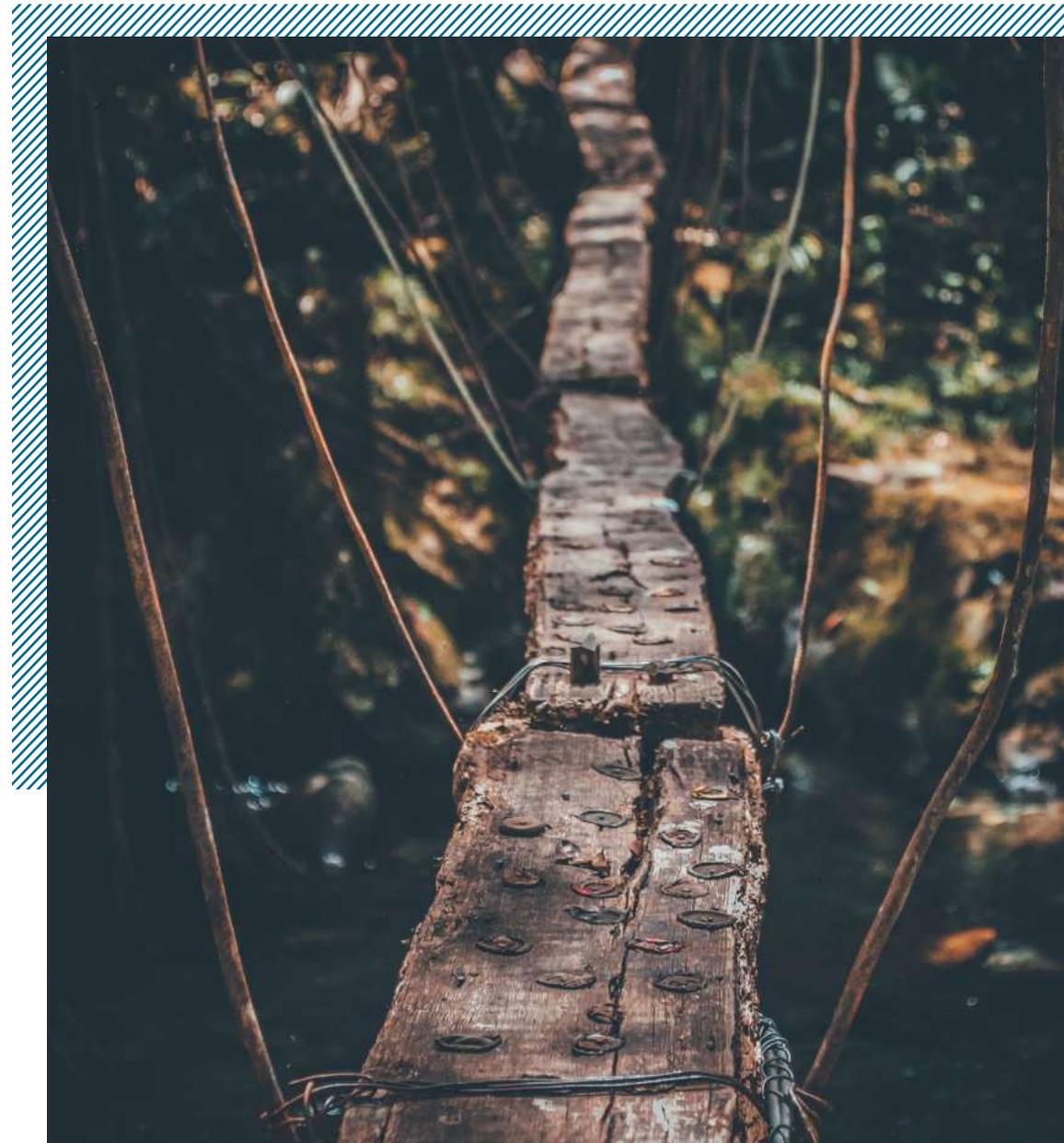
The first step towards implementation is developing an action pathway where shared ownership for implementation amongst all the relevant actors is created.

This process should build on the stakeholder mapping exercise before, using that and the identification of policies as a starting point. In the best case, it is also multi-stakeholder itself, so that those who will need to be a part of delivering this action plan also feel committed to and ownership of the responsibilities that sit with them. This is further outlined in the co-creation section.

You can look at past implementation “success stories” to learn what factors made these examples of good policy implementation, the challenges they face and how they were overcome →



<https://sustainable-prosperity.eu/designing-policies-wellbeing-economy/implementing-wellbeing-economy-policies/empowering-localised-policy-implementation>



Making an implementation plan → Understanding policies and stakeholders

Fill out this canvas! 

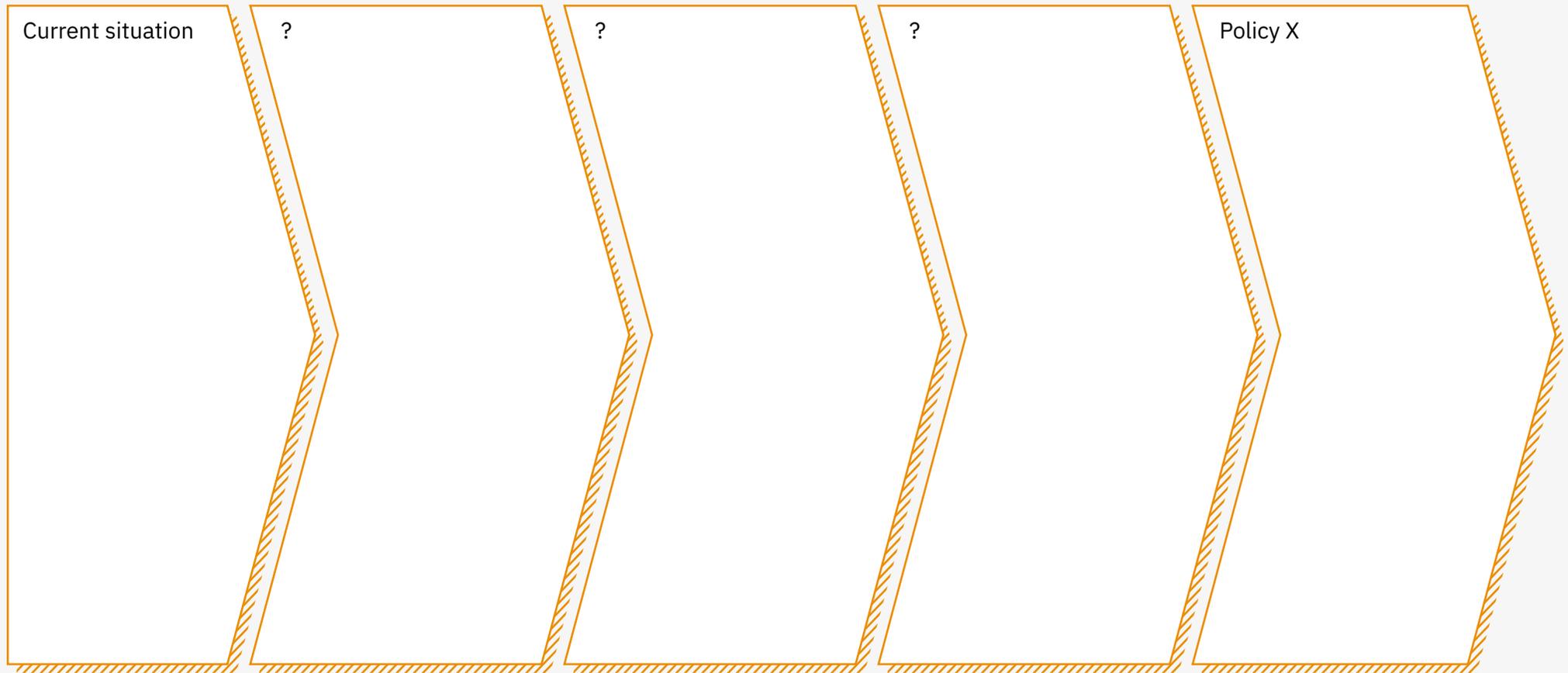
Topic	Who is opposition?	Who is interested?	Who do you need to influence?

Instructions:

Bring stakeholders from the mapping exercise and categorise them here.



Making an implementation plan → Steps to take Fill out this canvas!



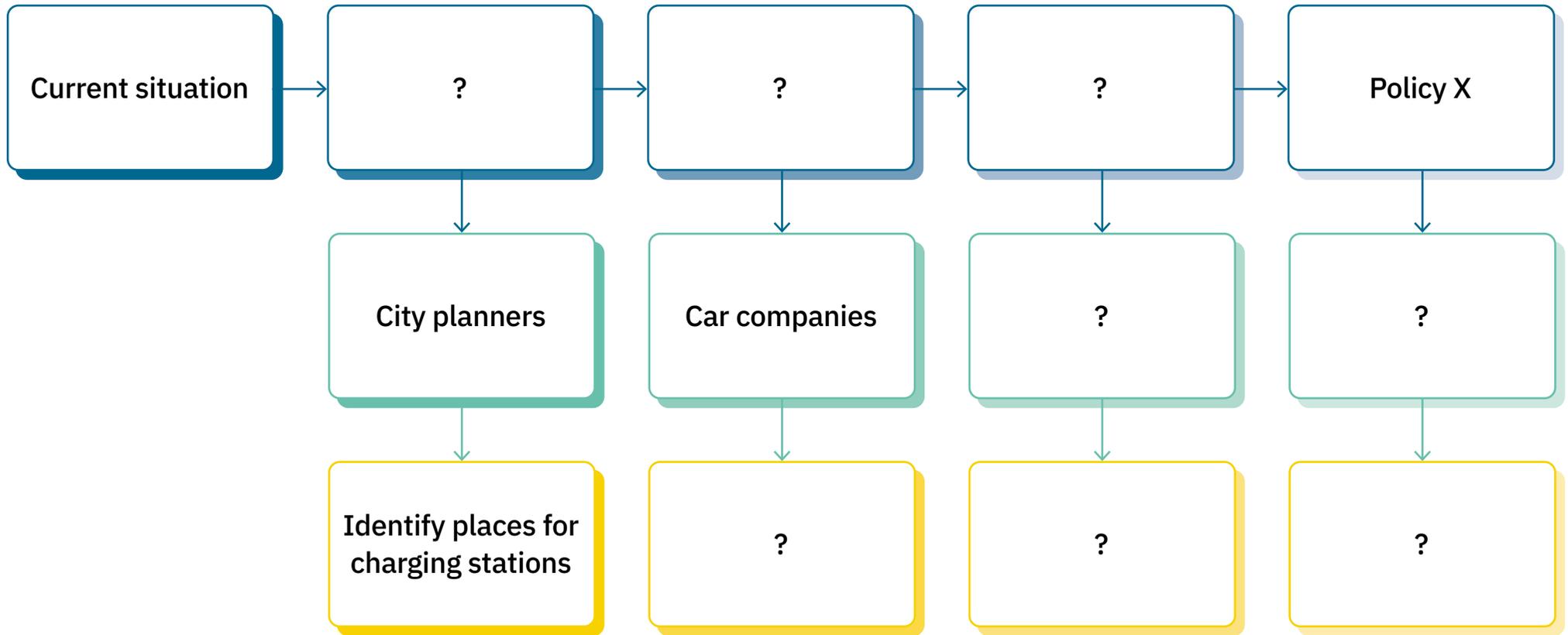
Instructions:

- Use one canvas per policy. First write the policy in the box on the far right. Then, describe the current situation.
- After this, then brainstorm and capture, what needs to happen next, and as steps along the way to bring the policy into place.

Note:

This canvas can also be used to look at policy impact by placing the policy in the current situation box, and writing the real world change in the policy box, and then describing the steps to take after the policy has been implemented.

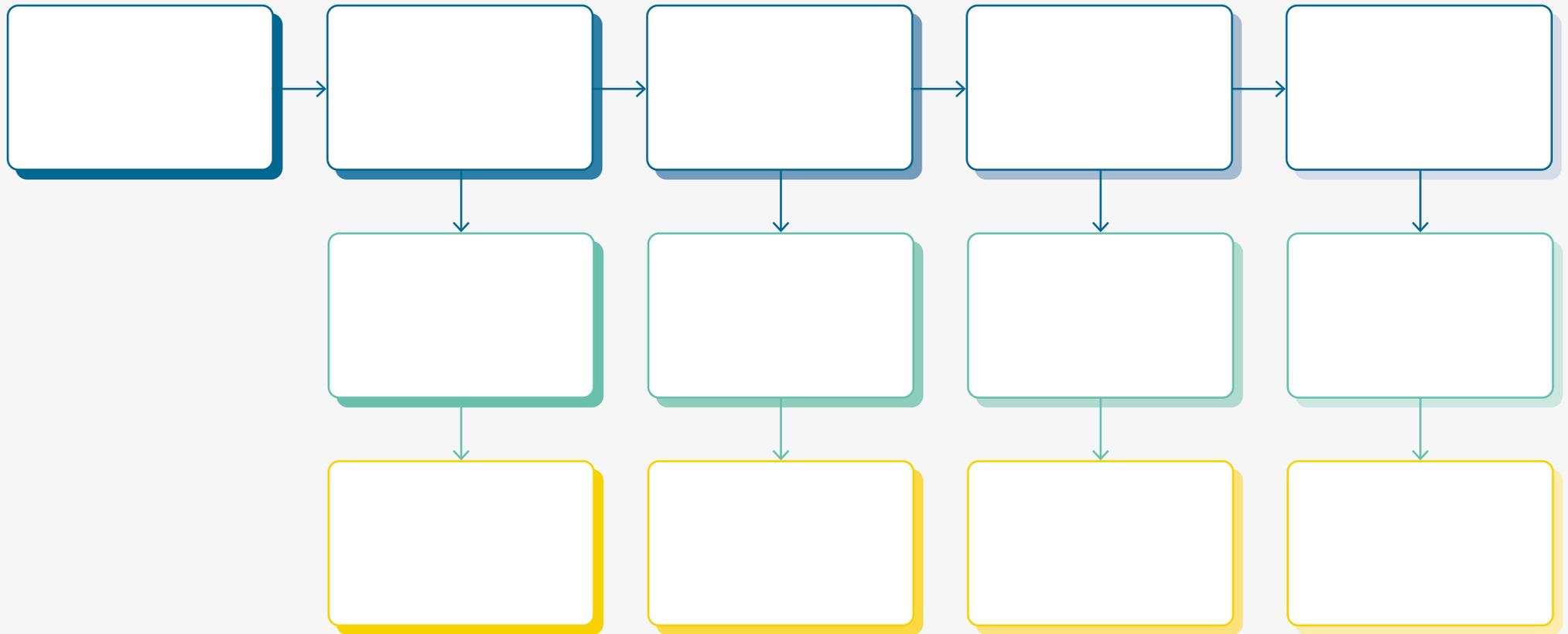
Who needs to be involved and what is their role?



Instructions:

Use this canvas to identify when each stakeholder needs to be involved in the process you've described above. In the first row, copy down your steps from the previous canvas. Then, identify who needs to be involved and what they need to do per step using the corresponding columns.

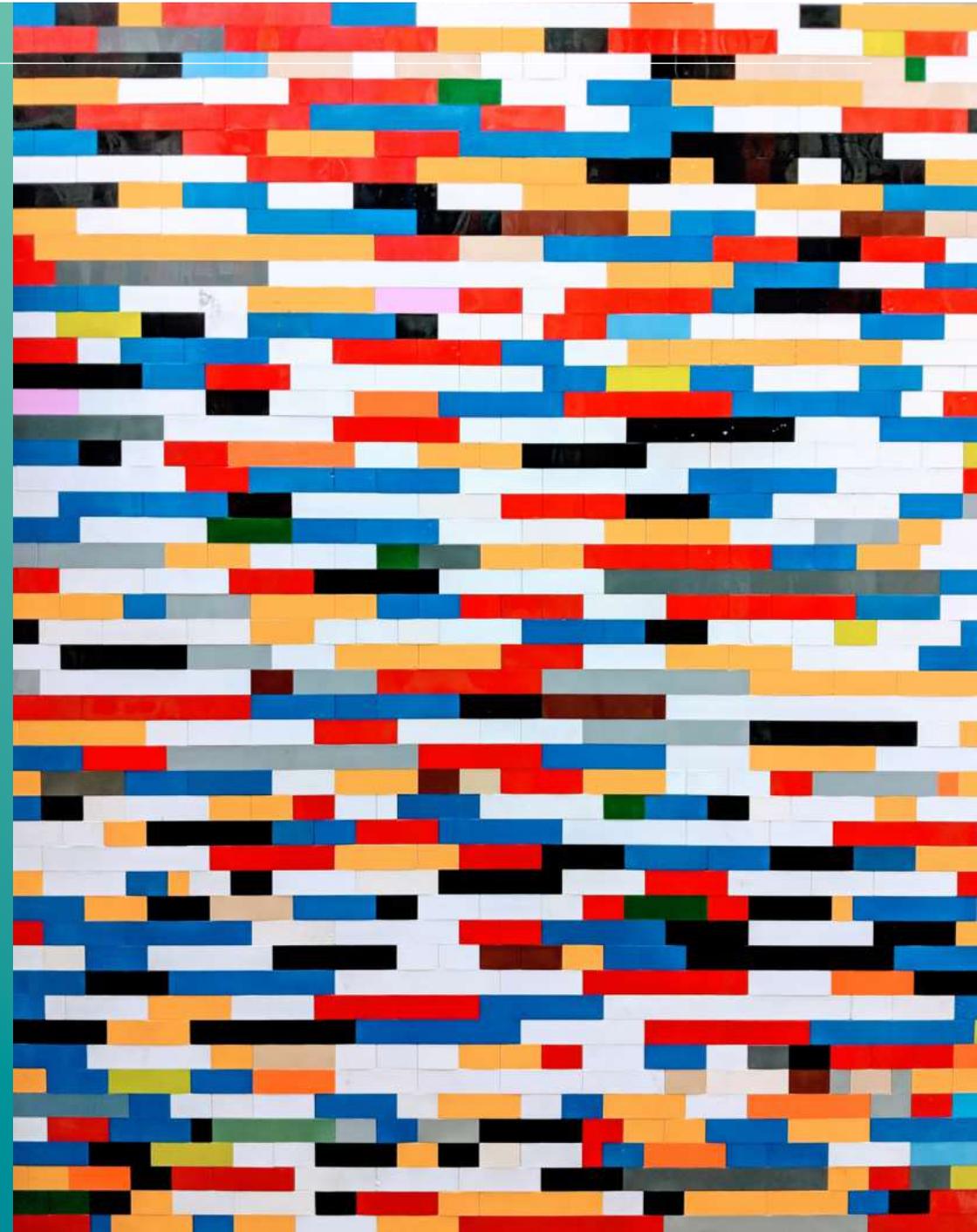
Who needs to be involved and what is their role? Fill out this canvas!



Instructions:

Use this canvas to identify when each stakeholder needs to be involved in the process you've described above. In the first row, copy down your steps from the previous canvas. Then, identify who needs to be involved and what they need to do per step using the corresponding columns.

Evaluating policy impacts on wellbeing



Evaluating policy impacts on wellbeing

There are two aspects of monitoring policy impacts on building a wellbeing economy that need to be considered as part of the process.

The first is about the process to approve a policy, often referred to as ex-ante assessment. Ex-ante policy assessment helps to understand whether there is a need for action or a certain policy. It also analyses possible impacts of available policy solutions. This type of assessment is carried out during the preparation phase, before the decision is made to approve the policy. A well-prepared ex-ante assessment provides evidence, and informs and supports the decision-making process.

Any policy designed will need to be evaluated and assessed through existing tools, structures, and processes. In some cases, these processes are already shifting. However, these processes could be a barrier for approval and may need to be reconsidered to ensure wellbeing policies are evaluated for the contribution they make to the wellbeing economy. Unless they are re-oriented to assess for wellbeing economy goals, the policies that are designed in this process may not pass traditional assessments.

In addition is important that these processes consider:

- The possible trade-offs and tensions of different objectives and different instruments
- An evaluation of at what governance level the specific policy objectives can be best achieved

The second is about assessing the policy impact towards wellbeing economy goals, often referred to as ex-post. At this stage, it is important that the goals identified earlier in the process need to be specific and measurable to enable assessment of whether policies are contributing towards them. This process comes after the policy is implemented to assess whether it really works. If specific goals are not defined in the beginning and the policy has not been monitored throughout its implementation, it is not possible to see how the policy contributes to achieve its objectives. It also becomes very challenging to understand whether the tensions were resolved, and trade-offs have been managed as intended.

A well-designed ex-post analysis clearly links to the shared wellbeing vision that was set at the beginning of the process and serves as evidence for new policies.



This playbook was developed by ZOE Institute for Future-fit Economies with support from the Wellbeing Economy Alliance (WEAll) and Dr. Aileen McLeod.

ZOE Institute for Future-fit Economies is a non-profit and independent think & do tank. We are dedicated to research for a future-fit economy. At the interface of politics, science and civil society, we develop trend-setting impulses for the fundamental questions of economic development.

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