

GREATER LONDON AUTHORITY

REQUEST FOR DIRECTOR DECISION – DD2804

Economic and Infrastructure Uses Demand and Supply Study – updated population projections

Programme: Making Best Use of Land

Executive summary:

The Economic and Infrastructure Uses Demand and Supply Study is a key piece of evidence informing the preparation of the new London Plan. This study (commissioned in March 2025) includes modelling of future demand for various economic uses. With updated population projections emerging, more work is needed to enhance this modelling for a range of uses, based on these latest projections.

The original study was approved in Mayoral Decision (MD) 3301, with £120,000 specifically allocated to this project. Additional associated costs are covered by contingency allowances within that MD.

Decision:

That the Executive Director of Good Growth approves spending up to £17,000, in financial year 2026-27, for further work on the Economic and Infrastructure Uses Demand and Supply Study. This work will update the future-demand modelling, based on the latest population projections.

AUTHORISING DIRECTOR

I have reviewed the request and am satisfied it is correct and consistent with the Mayor's plans and priorities.

It has my approval.

Name: Phil Graham

Position: Executive Director Good Growth

Signature:



Date: 13 April 2026

PART I – NON-CONFIDENTIAL FACTS AND ADVICE

Decision required – supporting report

1. Introduction and background

- 1.1. The decision for the original study was approved in Mayoral Decision (MD) 3301. The study provides quantitative and qualitative evidence of the demand for, and supply of, economic and infrastructure uses in London, at a strategic level. It will form part of the evidence base for the new London Plan and its Examination in Public. It will also support policy development, implementation and monitoring for a wide range of policies.
- 1.2. The original study was procured for £135,799.90; this is now being spent. MD3301 specifically allocated £120,000 to the project; the remaining costs were covered by contingency allowances within that MD. However, this project exceeds what can be covered by those contingencies.

2. Objectives and expected outcomes

- 2.1. Following some delays, up-to-date GLA population projections will be available in April 2026. At this point, further work is needed to update the Economic and Infrastructure Uses Demand and Supply Study, using this newly available data.
- 2.2. How future demand for several economic and infrastructure uses is calculated depends on these projections. The work will update the forecasts for relevant uses, as well as the related narrative and commentary. This means the assessment of economic and infrastructure demand will be more accurate and timely. This, in turn, will ensure that the appropriate amount of land needed is identified. This is particularly important given the pressure to accommodate other uses (such as housing), and to minimise use of the Green Belt.
- 2.3. Consultants are expected to produce updated modelling results for the demand-assessment models for storage and distribution; and for all population-based and spend-based uses in scope. All relevant reporting will be updated accordingly – including conclusions; recommendations; and equality, diversity and inclusion implications.

3. Equality comments

- 3.1. Under section 149 of the Equality Act 2010, as a public authority, the GLA must have due regard to the need to eliminate unlawful discrimination, harassment and victimisation; and to advance equality of opportunity, and foster good relations, between people who have a protected characteristic and those who do not.
- 3.2. This work will provide accurate, quantitative evidence of the demand for different economic uses in London. As such, it is expected to support London Plan policy approaches to ensure sufficient land and premises, across a wide range of economic uses, in order to accommodate and service projected growth in London. At a strategic level, this should help to underpin the aim of the London Plan (and the London Growth Plan) to support economic success and share the benefits more equitably across the capital. In this way, it will help to reduce the disproportionate impact of poor economic prospects on people who share protected characteristics.
- 3.3. It is not considered that there will be any negative equalities impacts associated with this decision.

4. Other considerations

Key risks and issues

4.1. Not carrying out the work would have the following effects:

- It would increase the risk that the provision of land and premises for employment, infrastructure and land to support London's economic functions is insufficient. This may give rise to insufficient servicing; and therefore have negative impacts on the capital's economy, employment, competitiveness and sustainability. As an example, between 2001 and 2020, London lost 18 per cent of its industrial land. This has put extra pressure on the services and infrastructure London needs to function sustainably.
- It would undermine the Mayor's evidence base to support the new London Plan, and its associated Examination in Public; and the work with boroughs on Local Plans.
- It would risk sub-optimal investment to support London's employment, industrial areas, businesses and infrastructure.

Links to Mayoral strategies and priorities

4.2. The work will inform:

- the development of long-term policy approaches in the new London Plan
- the implementation and monitoring of the current London Plan.

It will complement the evidence base and implementation of the London Growth Plan. The work also informs and supports the delivery of the Making Best Use of Land Delivery Plan – ensuring appropriate provision of, and balance between, different land use requirements.

Consultations and impact assessments, including data protection

4.3. Impact assessments are carried out as part of preparing reviews and alterations to the London Plan; and developing London Plan Guidance. A separate impact assessment is not required for this work. Consultation on the project specification has taken place within the GLA.

Conflicts of interest.

4.4. There are no conflicts of interest to note for any of the officers involved in the drafting or clearance of this decision form.

5. Financial comments

5.1. Approval is sought to spend up to £17,000 in financial year 2026-27, for further work on the Economic and Infrastructure Uses Demand and Supply Study. This work will update the future demand modelling based on the latest population projections. This cost will be funded from the London Plan programme budget.

6. Legal comments

6.1. Section 334 of the Greater London Authority Act (the Act) requires the Mayor to prepare and publish a Spatial Development Strategy (known as the London Plan). Section 339 of the Act requires the Mayor to keep the London Plan under review – especially matters that may be expected to affect the development of Greater London, or the planning of its development.

- 6.2. The decision requested of the Executive Director of Good Growth (to approve collating the evidence base to support the London Plan) also concerns the exercise of the GLA’s general statutory powers under section 30 of the Act, to do such things considered to further, or that are facilitative of, or conducive or incidental to, the promotion of economic development and wealth creation, social development, or the improvement of the environment in Greater London.
- 6.3. In formulating the proposals in respect of which a decision is sought, officers have complied with the GLA’s related statutory duties to:
- pay due regard to the principle that there should be equality of opportunity for all people
 - consider how the proposals will promote the improvement of health of persons, health inequalities between persons and to contribute towards the achievement of sustainable development in the UK
 - consult with appropriate bodies.
- 6.4. The GLA also has a subsidiary power, pursuant to section 34 of the Act, to do anything that is calculated to facilitate, or is conducive or incidental to, the exercise of any of the GLA’s statutory functions. In this case, the work to collate the evidence base to support the London Plan is incidental to the GLA’s section 30 powers (defined above); and its powers under sections 334 and 339 of the Act.
- 6.5. In taking the decision requested, the Executive Director must have due regard to the Public Sector Equality Duty – namely the need to eliminate discrimination, harassment, victimisation and any other conduct prohibited by the Equality Act 2010. Throughout the process outlined above (in particular section 3), due regard will need to be had to the equality impact considerations and mitigations.
- 6.6. The services required will be procured in consultation with TfL Procurement – who will determine the detail of the procurement strategy to be adopted in accordance with the GLA’s Contracts and Funding Code. Officers must liaise with TfL Procurement in this regard; and to ensure all necessary contract documentation is put in place, and executed, before services begin.

7. Planned delivery approach and next steps

- 7.1. The exact timing of the work depends on the availability of the updated population projections. The broad timeframe is as follows:

Activity	Timeline
Inception and delivery start	April 2026
Completion of modelling outputs and reporting	May 2026

Appendices and supporting papers: None

Public access to information

Information in this form (Part 1) is subject to the Freedom of Information Act 2000 (FoIA) and will be made available on the GLA website within one working day of approval.

If immediate publication risks compromising the implementation of the decision (for example, to complete a procurement process), it can be deferred until a specific date. Deferral periods should be kept to the shortest length strictly necessary. **Note:** This form (Part 1) will be published either within one working day after it has been approved or on the defer date.

Strategic Programmes

Does this decision seek approval for activity falling within the remit of a programme delivery plan? YES

If YES, which programme does this fall within: Making Best Use of Land

Part 1 – Deferral

Is the publication of Part 1 of this approval to be deferred? NO

Part 2 – Sensitive information

Only the facts or advice that would be exempt from disclosure under the FoIA should be included in the separate Part 2 form, together with the legal rationale for non-publication.

Is there a part 2 form? NO

ORIGINATING OFFICER DECLARATION:

Drafting officer to confirm the following (✓)

Drafting officer:

Jorn Peters has drafted this report in accordance with GLA procedures and confirms the following:

✓

Assistant Director/Head of Service:

Lucinda Turner has reviewed the documentation and is satisfied for it to be referred to the Sponsoring Director for approval.

✓

Financial and Legal advice:

The Finance and Legal teams have commented on this proposal, and this decision reflects their comments.

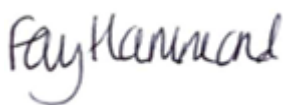
✓

Mayoral Delivery Board

A summary of this decision was reviewed by the Mayoral Delivery Board on 13 April 2026.

CHIEF FINANCE OFFICER:

I confirm that financial and legal implications have been appropriately considered in the preparation of this report.



Signature

Date 14 April 2026