

CENTRE FOR LONDON

London Futures

September 2020 outline & proposal for sponsorship

Centre for London, the capital's independent think tank, is committed to helping the city through the current crisis and as it meets the challenges of recovery.

Coronavirus will have profound knock-on effects for almost every aspect of our lives. It is laying bare hidden problems and inequalities and revealing the fragility and interdependence of much of the infrastructure that supports us. But it is also unlocking new ways of working, new partnerships and new forms of social organisation, all of which should be harnessed to help London during the recovery.

Last year, we began the scoping work for a major strategic review of London, on a scale not seen for 30 years. We wanted to foster the new thinking that London needs to sustain its success and tackle its growing challenges.

It now feels more important than ever for London to develop a clear and shared vision for its future. But it is also more difficult to find the financial support we need to do it.

London's Futures will bring together a wide coalition of Londoners and organisations to realise an ambitious and resilient vision for London over the next 30 years. We hope that you can consider continuing your partnership with us.

We are hugely grateful to the Greater London Authority for supporting London's Futures during the initial strategic assessment stage.



Our expertise

Our research team has spent over 50 years combined working on the issues affecting London, having led teams within the Greater London Authority, the London Legacy Development Corporation, London boroughs, the Department for Communities and Local Government and the Prime Minister's Strategy Unit.

Through this experience we appreciate the need for realistic, deliverable ideas and understand the limitations and challenges facing many responding institutions. We believe this has never been more important than during this present crisis.



**“The ideas you
discuss and debate
help us create a more
open, connected and
inclusive London.”**

Sadiq Khan, Mayor of London



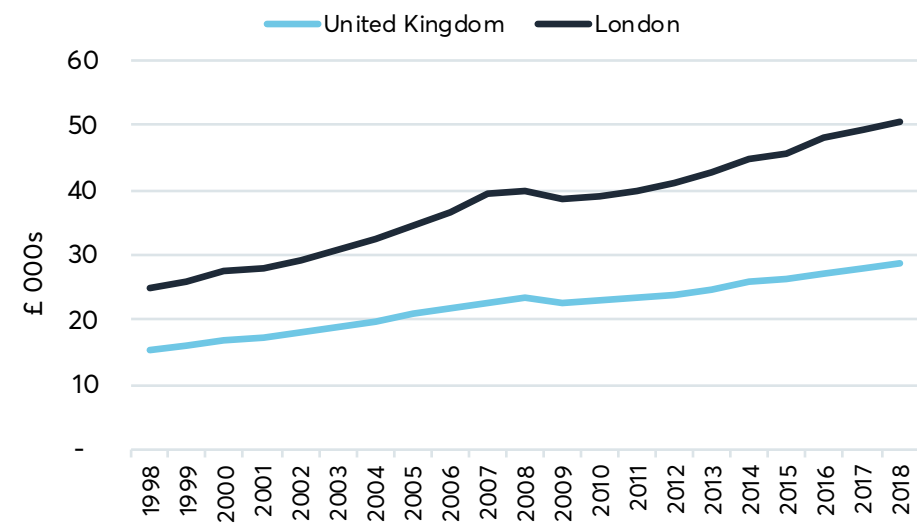
London's Futures so far: strategic assessment of London

- Developing our understanding of how London has changed over recent decades, the challenges it is facing today, and those it will face in the future
- The published report for Phase 1 will be used to inform and establish a baseline for debate about how London should chart its course in coming years

Some key findings on following pages:

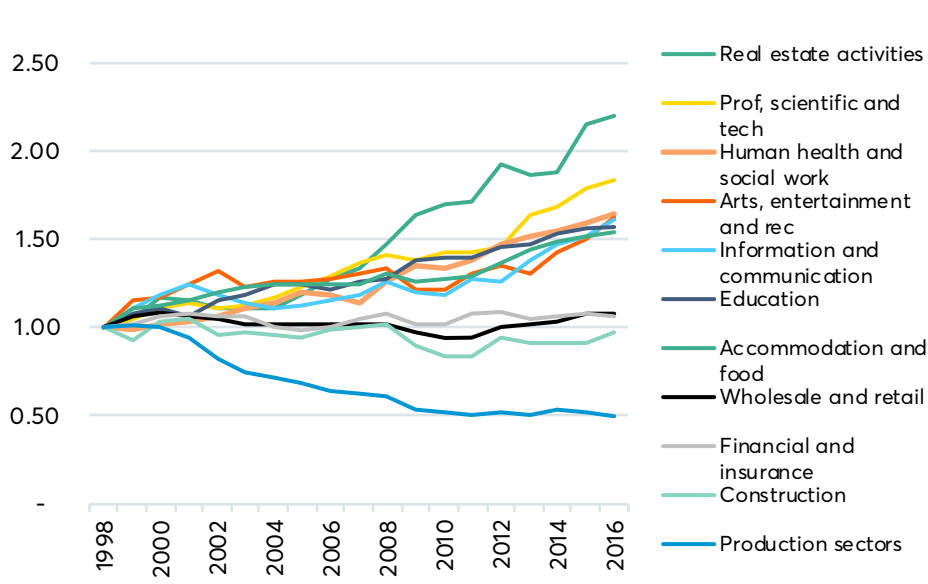
London's economy has grown in recent years but even before coronavirus may have been losing its dynamism.

1. Regional GVA per head (current prices)

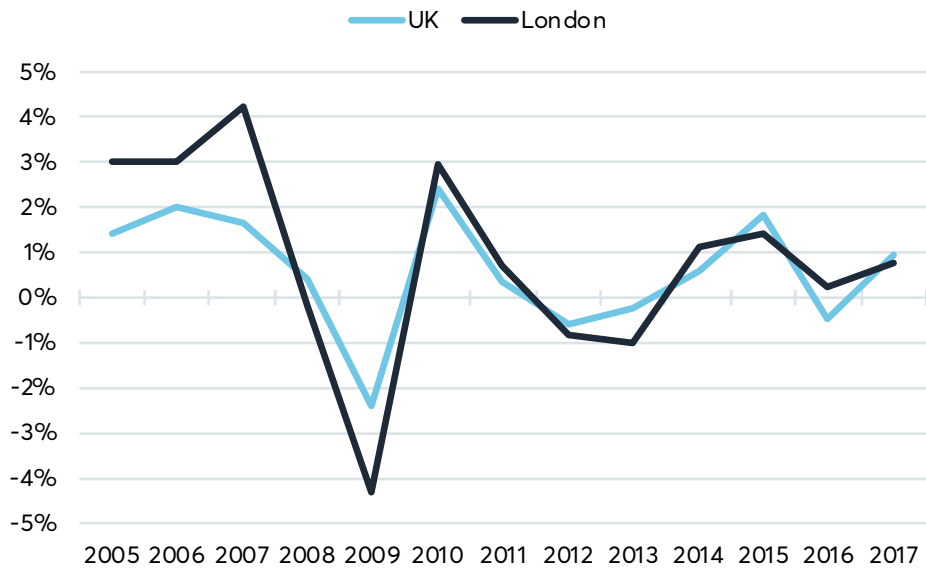


- 1. Growth in the capital has been faster than the rest of the UK's over 20 years; the capital now accounts for 25 per cent of the national economy.
- 2. The economy has specialised in a range of advanced financial and business services
- 3. Productivity remains ahead of other cities and regions, but growth has stalled in recent years.

2. Job numbers change in London 1998-2016 (1998=1)



3. GVA per hour worked, annual change (real terms)



**Before the crisis more Londoners
were working, but in-work
poverty was a growing problem.**

1. ILO unemployment rate

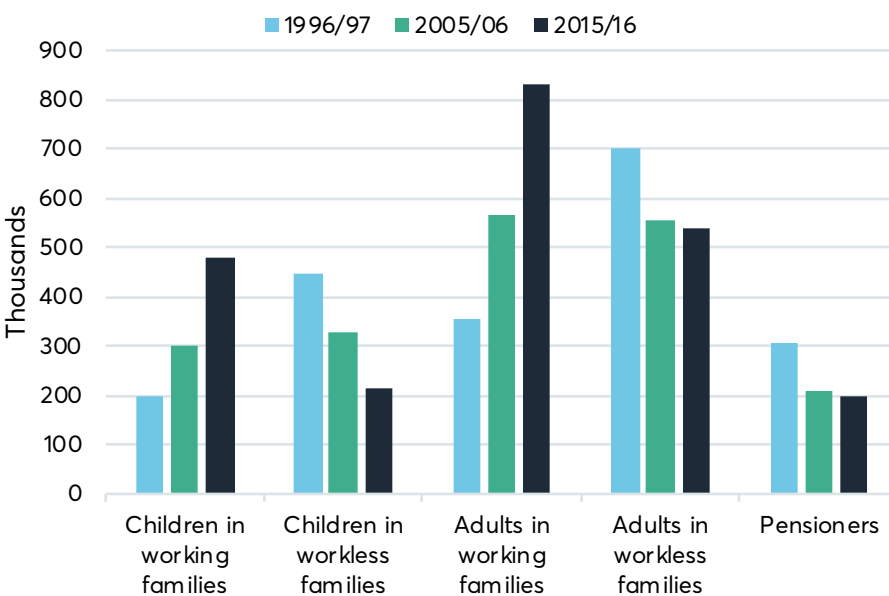


- 1. London's unemployment rate had plummeted since the 1990s – to near full employment.
- 2. But growth has been in low-paid city serving sectors as well as specialised global city services.
- 3. So in-work poverty has increased sharply (higher than any other region – largely because of housing costs).

2. Median hourly wage in fastest growing sectors, 2018

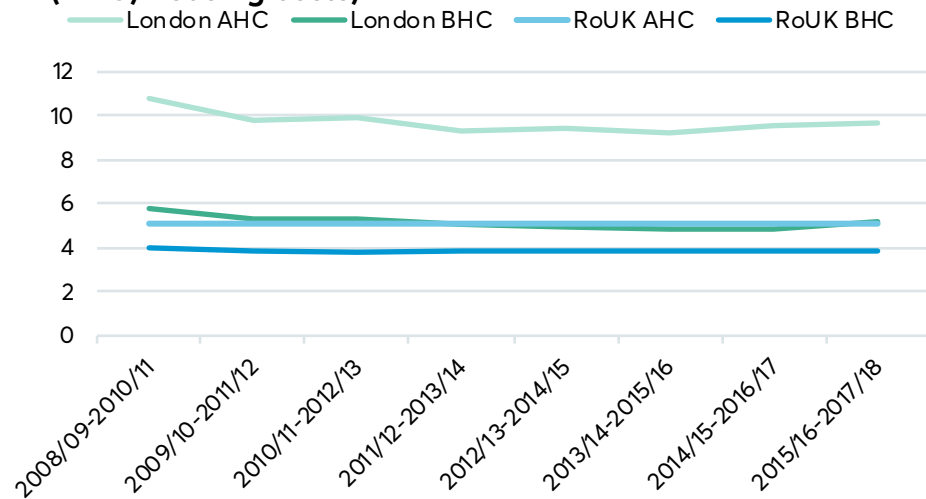


3. People in poverty



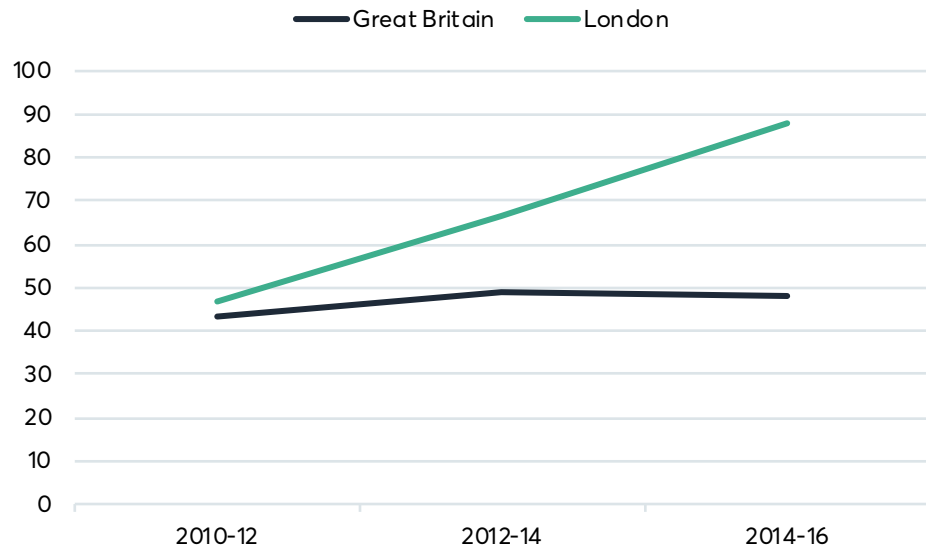
**Inequality – in terms of income,
wealth and experiences –
persists or is worsening.**

1. Income inequality (90:10 ratio, before (BHC) and after (AHC) housing costs)

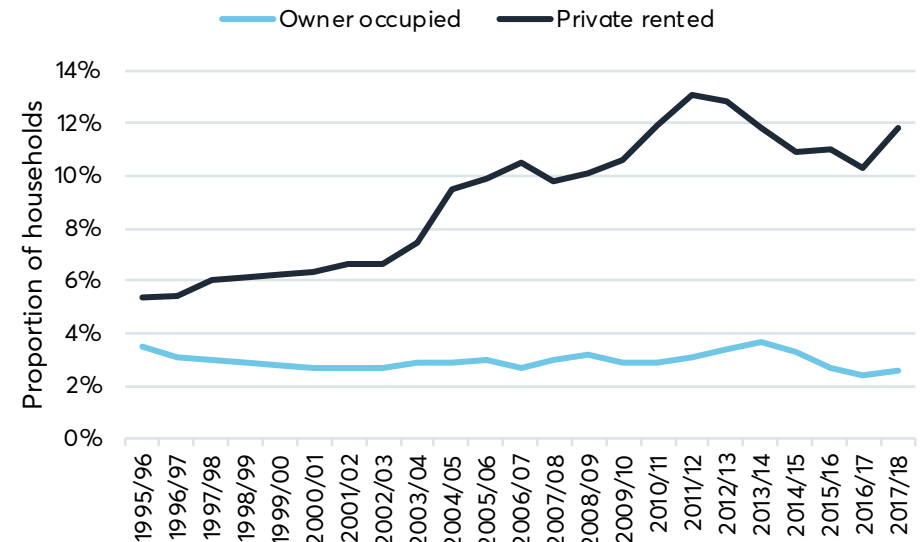


1. Income inequality persists, and housing costs make it worse than in rest of UK.
2. And wealth inequality has risen sharply since the financial crisis.
3. Differences in overcrowding are just one way that Londoners' experience of the city vary.

2. Wealth ratio (95:5 ratio)

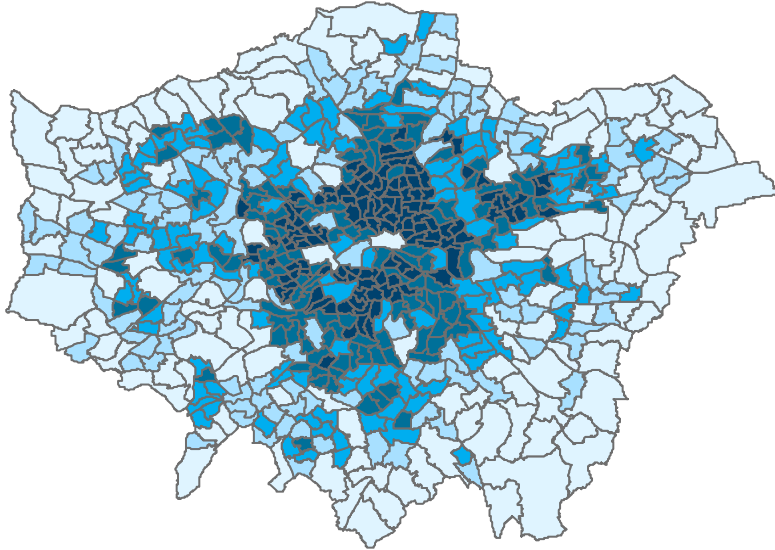


3. Overcrowding by tenure



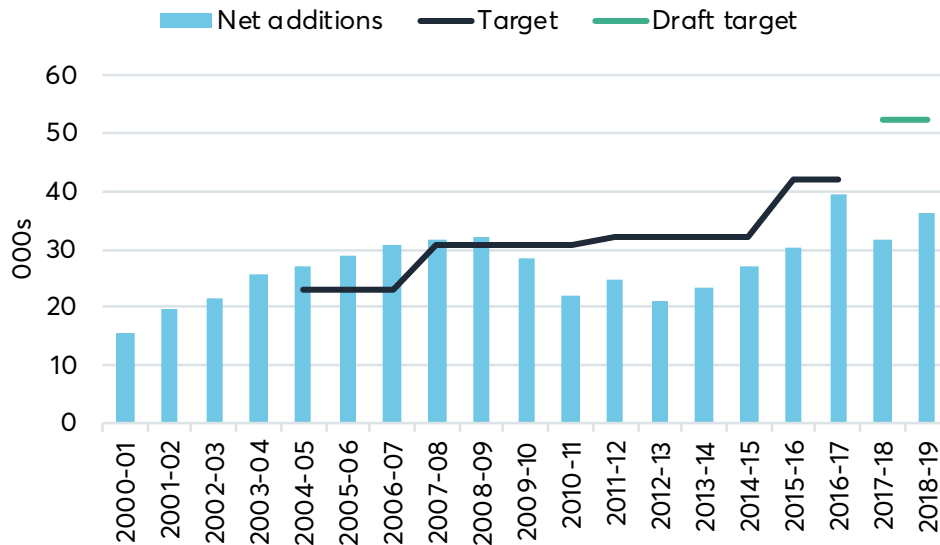
London's development has been uneven, and housing supply has lagged behind need.

1. Density

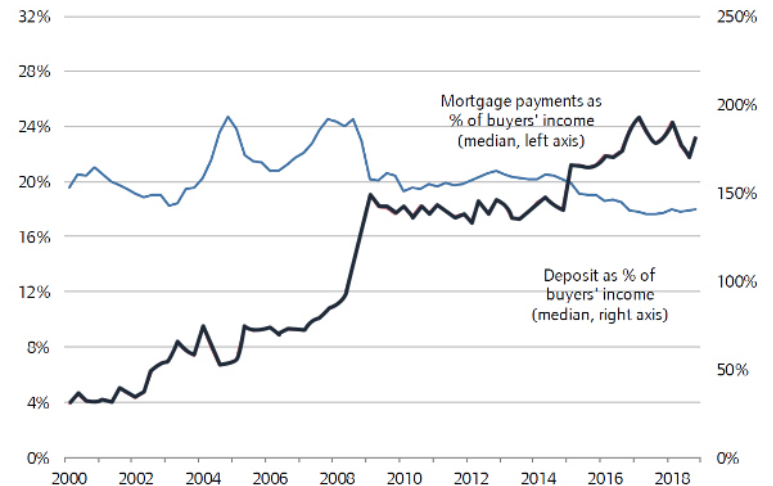


1. London remains densest in around the Central Activities Zone but has grown denser around some outer London centres.
2. Housing supply has consistently lapsed behind need, with affordable housing in particularly short supply.
3. Despite low interest rates, deposit levels make ownership difficult for those without wealth.

2. Net additional dwellings, and targets

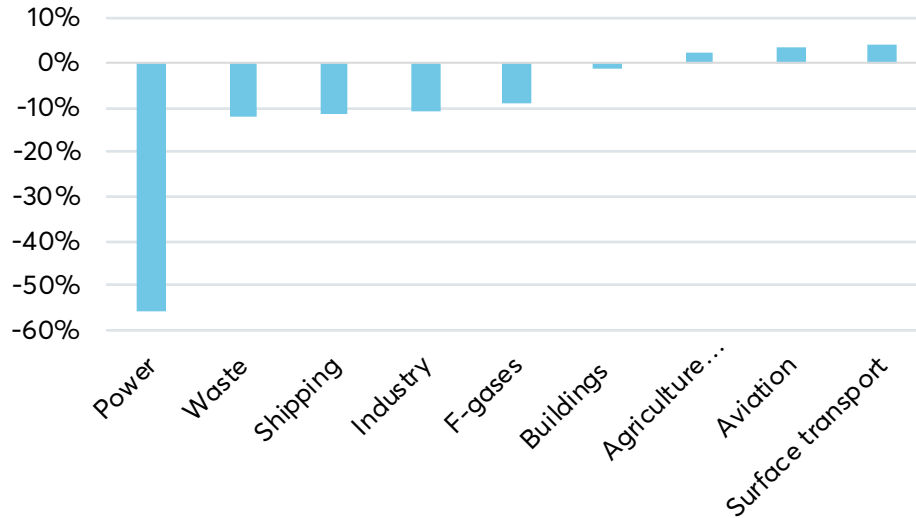


3. Trend in median deposit requirement and mortgage repayments as a share of income for first time buyers in London, 2000 to 2018



**London is at the forefront of
efforts to tackle the climate
emergency, but progress is too
slow**

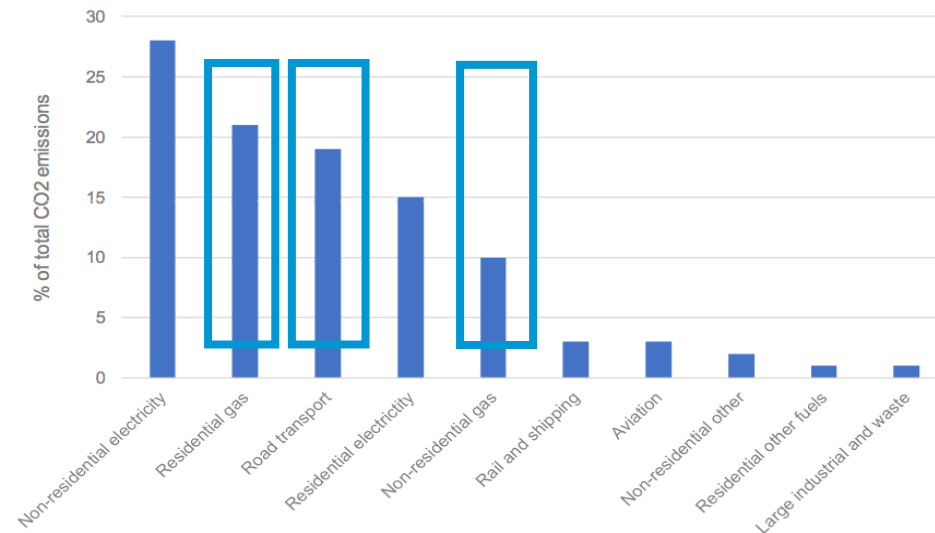
1. Change in GHG emissions in the UK 2013-2018



Source: Committee on Climate Change, Reducing UK Emissions, July 2019

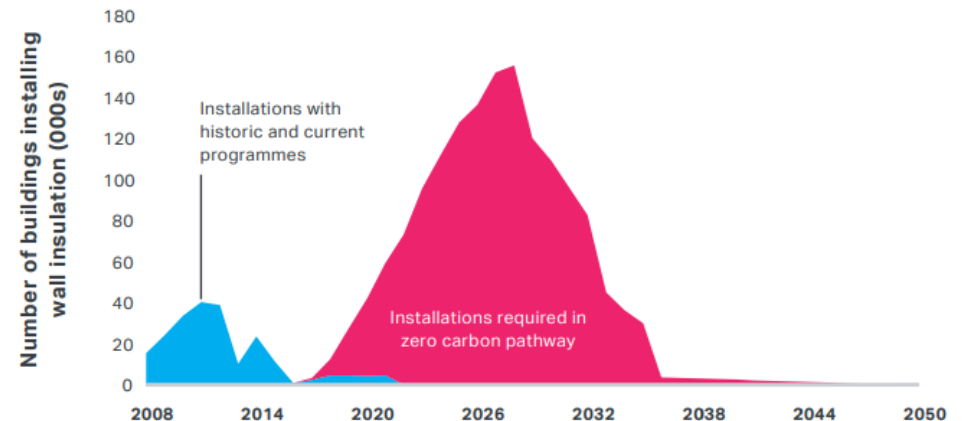
1. The UK power supply is rapidly de-carbonizing
2. But decarbonizing transport and buildings, especially heating is not on track
3. Electrification of transport and heating, and reducing consumption through insulation, smarter services and active travel need more impetus to meet net zero targets

2. CO2 emissions by source in London, 2015



Source: Mayor of London (2018), London Environment Strategy.

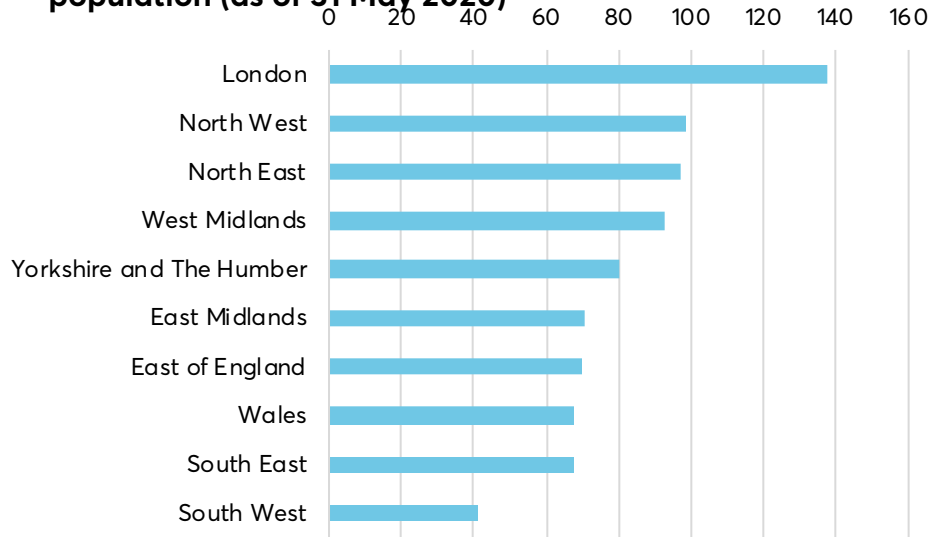
3. Level of wall insulation achieved with past programmes compared with level required in London's zero carbon pathway



Source: London's 1.5C Compatible Climate Action Plan, GLA, 2019

**Coronavirus has hit London
hard, compounding health
inequalities and threatening
many Londoners' livelihoods.**

1. Age-standardised COVID-19 mortality rate per 100,000 population (as of 31 May 2020)



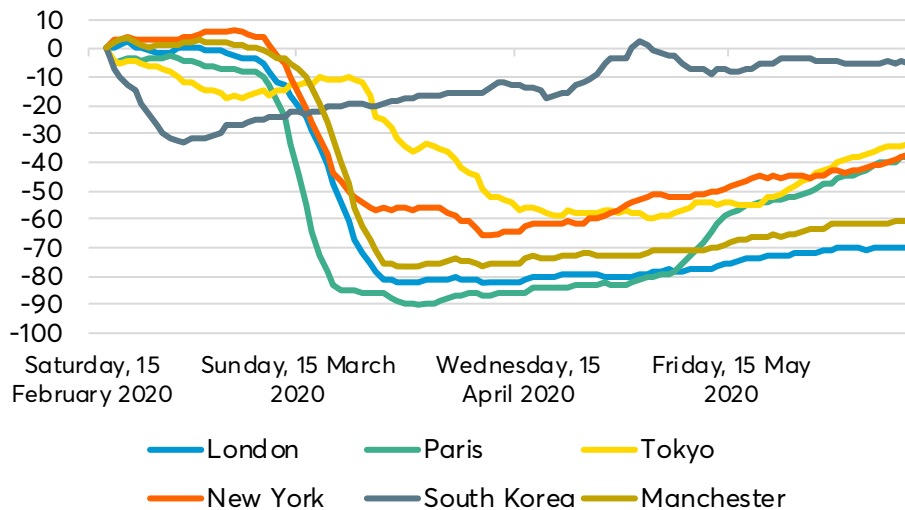
London had the highest age-standardised mortality rate of UK major cities in the early stages of the pandemic.

The city saw earlier infections, with deprived Londoners and those from minority ethnic groups most exposed and vulnerable.

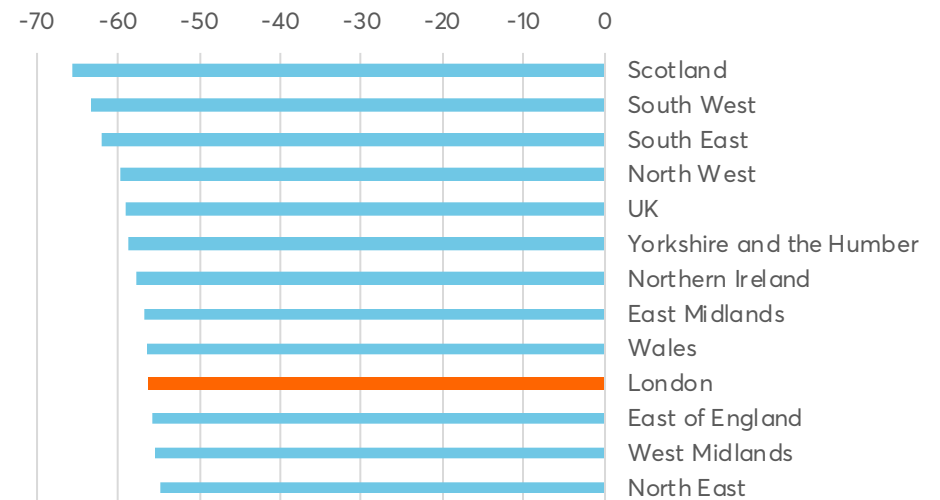
London is seeing some of the sharpest rises in unemployment as the visitor economy has suffered.

Central London's economy remains relatively depressed compared to other UK towns and cities, and London's suburbs.

2. Retail and entertainment visits by Google maps users, compared to baseline



3. Impact of COVID-19 on recruitment (Job postings on Indeed UK, 1 Feb to 26 Jun, compared to baseline)





London needs to sustain its successes and address its weaknesses...

... and must do this in the face of major global issues and trends:

- Recovery from coronavirus
- Climate change goals
- The rise of nationalism and populism
- Disruptive technologies and services
- Ageing population
- The continued rise of Asian economies

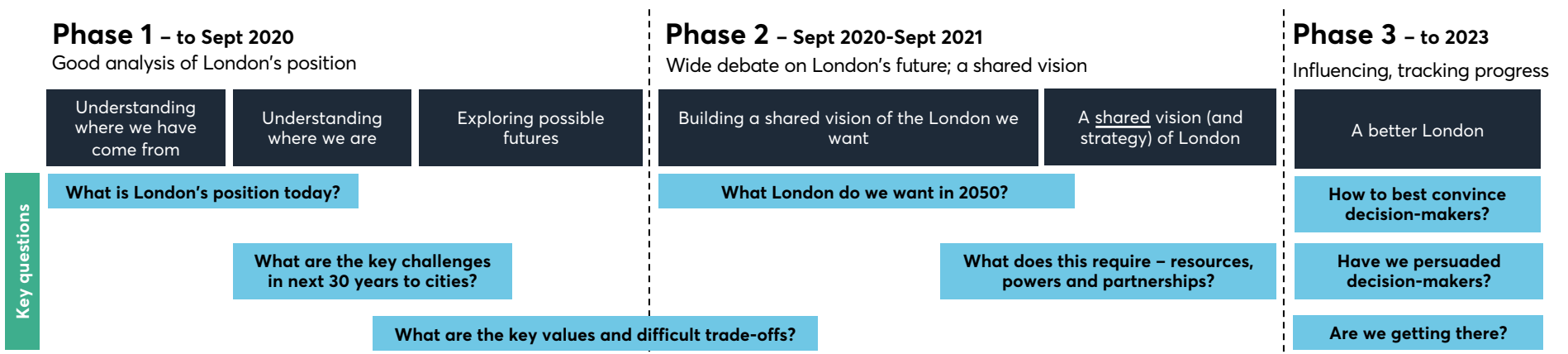
London's Futures will set a framework to enable us to measure and model how these are impacting the capital and create a narrative – drawn from the data and stakeholders across the capital – to put London's future into focus.

**Given these challenges, we need
your support to build a shared
vision of the London we want.**

Programme outline

We have now completed phase 1 of the programme, the strategic assessment of London's position and challenges.

Phase 2 is the core of the project, where we will engage a wide variety of Londoners with these challenges and co-create a vision of the city that we want.



Engaging London

London's Futures aims to develop a vision for London's future which draws on the expertise and perspectives of the capital's diverse communities and voices, and to develop a network of civil society organisations, groups and individuals who are invested in and able to champion that vision. Our engagement plan will involve elected representatives, civil society organisations and direct engagement with Londoners, and will be overseen by a dedicated sub-group of the Advisory Council.

Public engagement

Through direct polling, digital townhall events, workshops, media partnerships and an innovative digital tool, we aim to reach up to 10% of London population directly, to engage them in debates about London's possible futures, the values implicit in these, and trade-offs and choices. We will monitor closely participation by different groups and seek to ensure engagement from under-represented groups through targeted activity and working with appropriate community groups.

Civil society engagement

We will work with London's key civil society organisations, to enable us to reach their beneficiaries and constituents, and actively sustain that engagement after the main report launch in 2021. We will work with our Advisory Council sub-group to identify key partners. We anticipate that the network will include organisations and networks such as London Plus, Toynbee Hall, Cambridge House, London Living Streets, CVS, Trust for London and London Citizens. We will also target national bodies with an interests and networks in London like NCVO, Locality, The Equality Trust, Crisis, Shelter, Friends of the Earth, CPRE and CPAG.

Political and business engagement

We will work with London's businesses, and policy makers and elected representatives in Parliament, City Hall and the boroughs, to ensure visibility for and engagement in the development of the London's Futures vision, including its contribution to the UK's recovery from the Covid-19 crisis. As the London's Futures vision crystallises we will seek to shape and influence debate about the future of London, engaging across the national political and media landscape, including directly with all major political parties and government departments.

Research outline

Phase two

- Modelling future scenarios based on the strategic assessment report, to examine their impacts on London's economic, social and environmental assets
- Exploring the trade-offs and key choices to be made about London's future development, and undertaking further research into Londoners' aspirations for the future
- Building scripts, data, scenarios and questions/trade-offs for digital engagement tool
- Developing future scenarios in response to citizen, stakeholder and policy community engagement
- Additional research on emerging priority areas (e.g. resilience, de-carbonisation)
- Synthesis of post-coronavirus evidence and impact on possible futures
- Shaping polling programme, with stakeholders and partners
- Developing engagement toolkits with, and for partners
- Incorporating the above into a vision, strategy and action plan that will be tested and refined before launch

Programme detail

Phase 1 – to Sept 2020

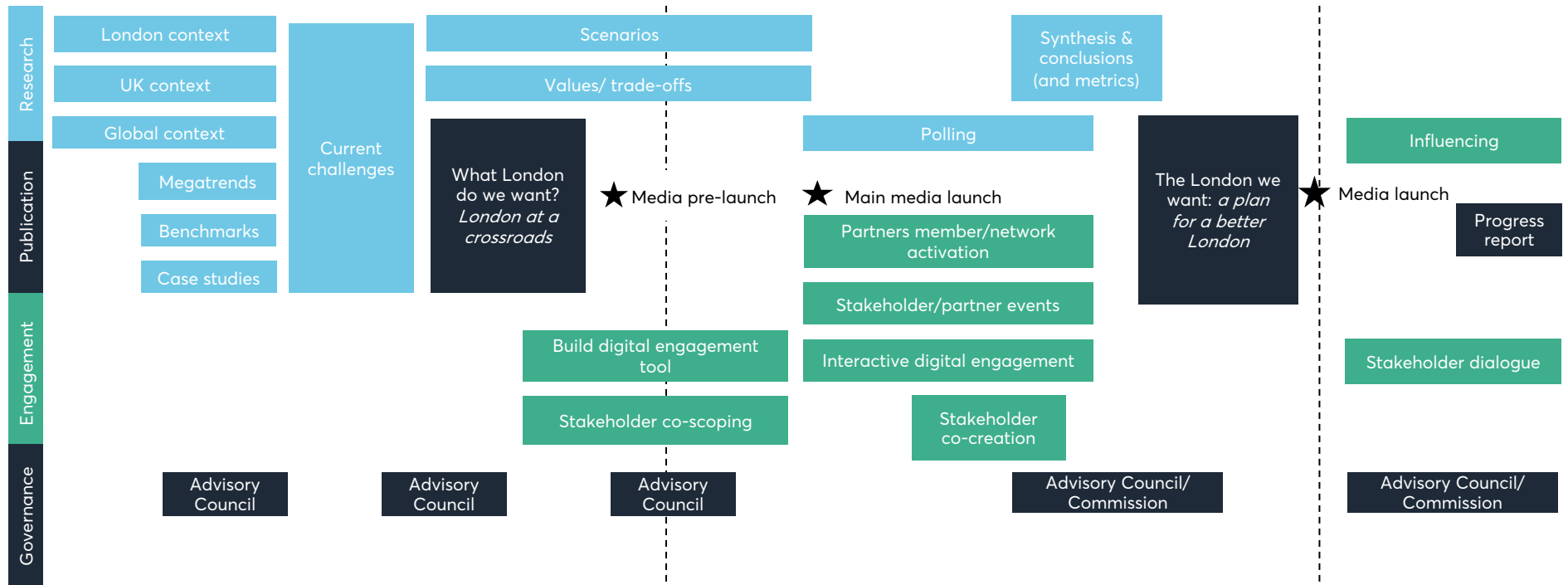
Good analysis of London's position

Phase 2 – Sept 2020-Sept 2021

Wide debate on London's future; a shared vision

Phase 3 – to 2023

Influencing, tracking progress



Impact

We aim to publish a practical, evidence-informed vision for London's economic, social and political future that will guide the decisions and policies of the city's key decision makers for years to come and provide a framework for measuring success.

The precedent of the 1991 *London World City* Report shows that this is possible. That report enabled Government, London businesses and local authorities to have a conversation about London's future, its offer to residents and investors, and how these could be enhanced. It set London on its current path, crystallizing the need for the strategic leadership for the capital that became the GLA, and fleshed out what it means for London to be a 'global city'.

The enthusiastic support for this project from London's key political and economic organisations demonstrates the current appetite to look again at the fundamental assumptions of the 1991 report and reset the vision of London's future. The current coronavirus crisis makes thinking about the future more complex, but also more important than ever.

By engaging a much wider group of Londoners in this programme, we want the needs and attitudes of disadvantaged groups and communities from across the capital to shape that future.

Centre for London's network and track record in the capital makes us well placed to achieve what we are setting out to do. We just need the support to do it.

Sponsorship Package

Greater London Authority | Major Sponsor | £20,000 plus VAT

- **Branding and profile** Acknowledgement of your organisation on the Centre for London website, Centre for London's newsletter, and communications about the project
- **Acknowledgement** as Major Sponsor of Phase 2 of London Futures in relevant communications (e.g. press releases, on the Centre for London website project pages, in the Phase 2 Report, and any other relevant publications)
- **Membership** of the advisory council meeting with partners from across the public and private sectors; plugging in to Centre for London's networks of leaders and decision makers in the capital.
- **Support for internal communications** about the project where appropriate, providing e.g. expert speakers for events or briefings for different teams
- **Press release comment**
- **Opportunity** to submit case studies for potential inclusion in the final report, and to partner on a specific expert discussion 10 copies of the printed report

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Get in touch

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