



# CAZ FUTURES ACTION PLAN

**MAYOR OF LONDON**

**Central London Forward** 

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# INTRODUCTION

London's Central Activities Zone (CAZ) plays a crucial role in the capital, and it makes an out-sized contribution to the UK economy.

The CAZ was hard-hit by the coronavirus pandemic. Like the rest of London, the CAZ is bouncing back, but in many ways the recovery is slower than the rest of the capital, it faces ongoing headwinds, and there are new threats including the energy and cost of living crisis.

There has been much recovery-focused work led by local authorities and GLA including the creation of the [Economic Recovery Framework for London](#). However, there is no collectively agreed plan for the recovery of the CAZ.

This action plan aims to fill that gap – setting out how we will support the recovery and evolution of the CAZ post pandemic. It has been developed by six central London local authorities – Camden Council, City of London Corporation, Royal Borough of Kensington and Chelsea, Southwark Council, Tower Hamlets Council, and

Westminster City Council – working with the Greater London Authority, and Central London Forward, the sub-regional partnership for central London. It has been shaped by engagement with businesses and business groups, including the Business Improvement Districts in the CAZ.

The action plan sets out our collective vision for London's Central Activities Zone to be:

- » **A unique habitat** – an attractive place, where people want to visit and spend time, where people want to work, where businesses want to locate. It will be clean and green, with a high-quality public realm and local environment, where people feel safe, and where residents enjoy living.
- » A place for **unforgettable experiences** – the CAZ will provide incredible experiences which are not available anywhere else, and which draw people in. It will be a hive of creativity and culture, with a thriving visitor economy,



and a diverse and high-quality hospitality, arts and entertainment, heritage and retail offer.

» A space for **innovation and growth** – the CAZ will be the best place in the world for people to come together to collaborate and innovate. The exemplar of a net zero urban centre, the CAZ will have clusters in the industries of the future. The CAZ will generate wealth for the

whole of the UK, and provide high quality employment opportunities accessible for all Londoners.

The action plan highlights a series of actions – both for London government and London stakeholders – that we will implement over the next five years in order to deliver on this vision. The action plan also sets out the things which government could do to unlock the recovery of the CAZ.

# LONDON'S CENTRAL ACTIVITIES ZONE



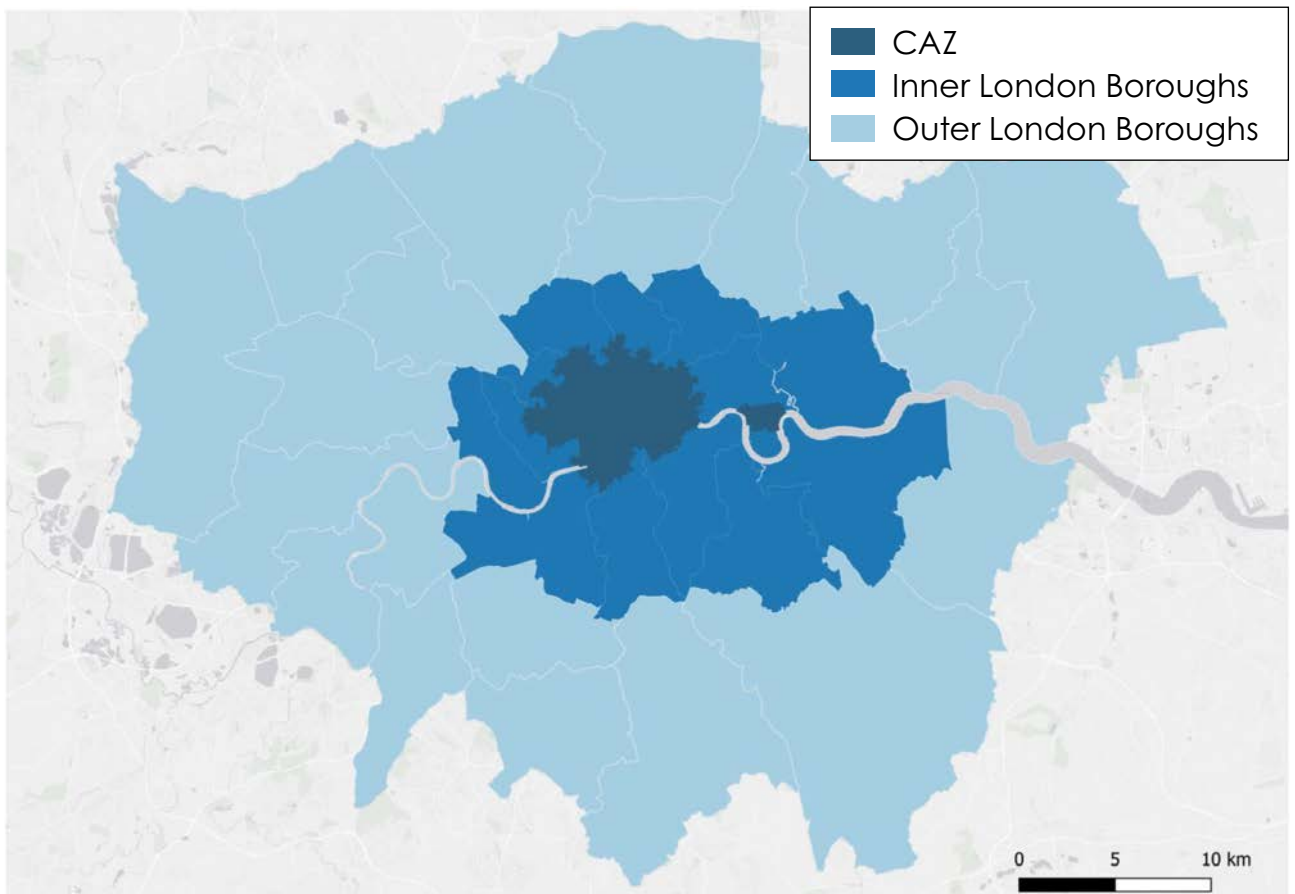
The Central Activities Zone (CAZ) is the beating heart of London. It is a small area, covering just 2% of the capital, including all of the City of London, most of Westminster, and part of eight other local authorities.\*

### The importance of the CAZ

While the CAZ is a small area geographically, it is of vital strategic importance for the capital and the wider UK economy.

The CAZ is an engine of jobs growth, providing employment opportunities for people living across the capital, and the wider south east. In 2020, there were around 2.2m jobs based in the CAZ, equivalent to 6.4% of employment in the UK. The number of jobs had increased by almost a third (29.7%) in the previous decade, almost double the rate for the rest of the capital (17.4%), and three times the rate of the rest of the UK (9.6%) (GLA Economics, 2022). The CAZ has exceptionally high

**Figure 1: The Central Activities Zone**



Study geographies: CAZ, non-CAZ Inner London and Outer London: CAZ boundaries defined by all LSOA's within or intersecting with the CAZ official boundaries available on the London Data Store

\* Camden, Hackney, Islington, Lambeth, Kensington and Chelsea, Southwark, Tower Hamlets, and Wandsworth

## CAZ Futures Action Plan

levels of productivity and higher levels of pay on average than the rest of the capital and the UK. GVA per worker stood at £110k in 2020, double the figure for the rest of the UK (Arup, 2021).

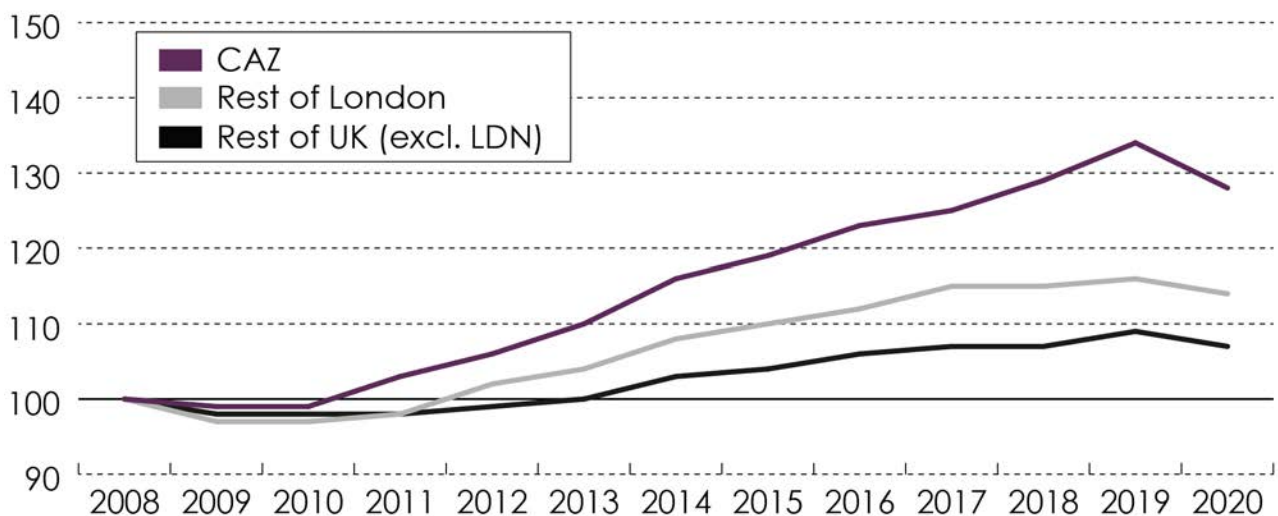
However, not all Londoners have equal access to the opportunities in the CAZ. The workforce in the CAZ is less ethnically diverse than the population of central London, and it has a lower proportion of women than both the workforce and the population across the capital as a whole (Arup, 2021). The CAZ's economy is also highly unequal. It has a concentration both of high-paying roles in professional occupations, and a concentration of employment in low paying sectors, and in insecure gig work. Black and minority ethnic Londoners are over-represented both in lower paying

sectors and in the gig economy in the capital, and in many cases are under-represented in the CAZ's higher paying sectors.

The CAZ is an engine of growth and prosperity for the UK. In 2020, the CAZ accounted for 44% of London's economic output and 9.5% of national output. The CAZ's economy was growing more rapidly than the rest of London and the UK, with GVA increasing by almost a fifth (18.7%) between 2015 and 2019 (GLA Economics, 2022).

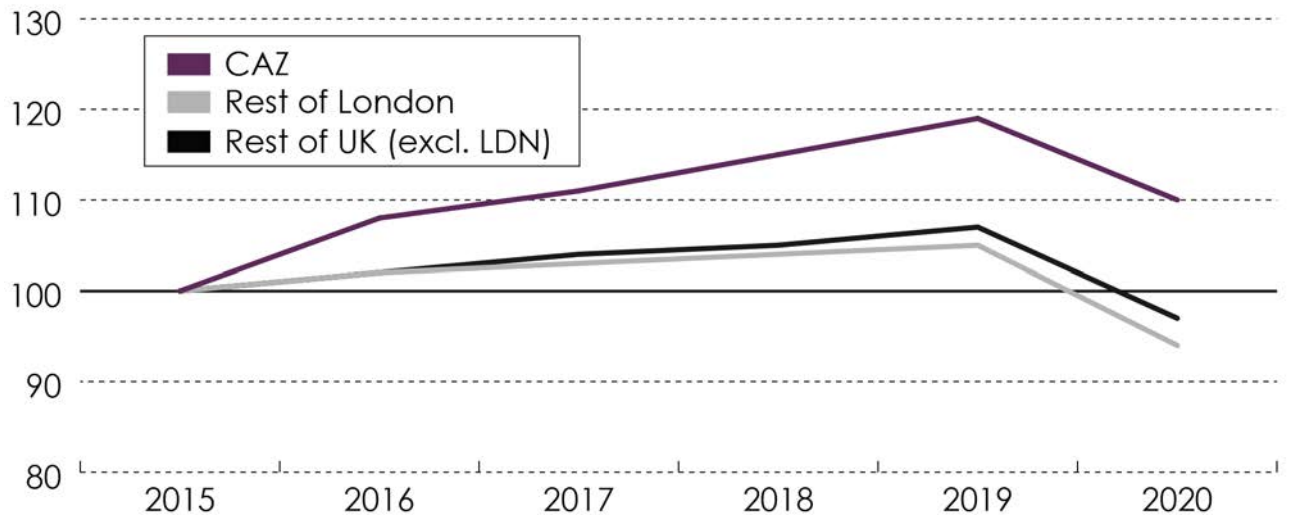
Recent economic growth in the CAZ has in part been driven by major new re-developments; from the regeneration of Euston/Kings Cross and Nine Elms, to the expansion of Canary Wharf.

**Figure 2: Employment in the CAZ was growing rapidly pre-pandemic**  
**Employment Growth, 2008–2020 (Index, Base Year = 2008)**



Source: GLA Economics, 2022

**Figure 3: Output in the CAZ was growing faster than London and the UK pre-pandemic**  
**GVA Growth, 2015–2020 (Index, Base Year = 2015, 2019 prices)**



Source: GLA Economics, 2022

The CAZ has a unique economic ecosystem. It is home to world-leading clusters – from financial and professional services, to digital tech and life sciences. The CAZ has a diverse and vibrant hospitality and retail offer, and a world-leading arts and entertainment sector, which help make the area an exciting place to live, an attractive place to visit, and a great place for businesses to locate.

The CAZ is the heart of a global city, and it competes with other global cities across Europe and the world. It serves as a magnet for visitors and investment from across the world. Nine out of ten of the capital's most visited attractions are based in the area, and millions of tourists visit the CAZ every year (Statista, 2022).

The CAZ is the gateway to the rest of London, and its success matters both for the whole of the capital, and for the UK too. The CAZ is an engine of jobs, and it relies on a workforce from across the capital, the south east and beyond. The success of the CAZ's clusters benefits economies in other parts of London and the UK too. The film studios in outer London are linked to the media and creative cluster in Soho, and the food businesses that ring the capital rely on the hospitality sector in the CAZ. The strength of the financial services sector in the City benefits the clusters in Leeds and Edinburgh, and the success of the media industry in the CAZ helps drive the growing sector in Manchester.



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As well as being a major business centre, the CAZ is home to a third of a million Londoners. The population of the CAZ was growing rapidly in advance of the pandemic, at a rate faster than the rest of the capital (GLA, 2021). The population of the CAZ is highly diverse, and the area includes both the wealthiest areas of the UK, and some of the most deprived wards in the country.

### Changes in the CAZ pre-pandemic

The CAZ was already undergoing significant and rapid change pre-pandemic.

The retail sector was undergoing rapid transformation. The proportion of retail sales made online increased five-fold between 2007 and 2019, before accelerating during the pandemic. This has forced retailers in the CAZ to adapt, including through the development of experiential and multi-channel retail.

### The impact of the pandemic on the CAZ

The CAZ was hit hard by the pandemic. Entire sectors that were crucial for the CAZ's economy – including hospitality, arts and entertainment and non-essential retail – were forced

**Figure 4: Online retail grew rapidly in the years preceding the pandemic**  
**Internet sales as a percentage of retail sales, 2006–2022**



Source: ONS 2022

to close for several months. When they were able to re-open, sectors reliant on in-person custom continued to suffer due to significantly lower footfall.

The pandemic had a profound impact on offices and workspaces, with hundreds of thousands of commuters shifting to home-working. The decline in commuters visiting the CAZ led to an estimated £1.9 billion in lost expenditure in 2020, with a particularly significant impact on the City of London (GLA, 2020).

The pandemic also led to a dramatic decline in tourism – both domestic and international. This led to a £10.9bn loss in tourism expenditure in the CAZ alone in 2020, which hit the West End particularly hard (GLA, 2020).

The significant decline in footfall and consumer spend had a large impact on CAZ-based businesses. The number of vacant units in the City of London increased by almost half (47%) in 2020 (The Retail Bulletin, 2021).

This in turn had a significant impact on employment. Despite the measures put in place to protect employment, the number of jobs in the CAZ fell by 4.3% in 2020, three times greater than the decline in the rest of London (1.4%) and the rest of the UK (1.5%). The decline was particularly large in sectors such as hospitality (11.6%) and arts and entertainment (11%) (GLA Economics, 2022).

The lifting of restrictions led to a gradual return to the office, supported by campaigns such as the City of London's [#SquareSmile](#). However, the pandemic appears to have left a significant change in working patterns with the emergence of hybrid working. Over one in three Londoners continued to work from home in early 2022, over double pre-pandemic levels (ONS, 2022). This change appears to be here to stay; three in four London workers think we will not return to the previous way of working (Kings College, 2022).

The impact of the pandemic on the capital's economy did not fall evenly. Many disadvantaged groups – including low paid workers, young people, and Londoners from Black and minority ethnic backgrounds – were particularly likely to lose their jobs (L&W, 2020, GLA, 2021). This means that the pandemic has deepened the inequalities that scar the capital.

## Recovery and evolution

London is a resilient city. It has faced many crises before, and it has always recovered and evolved.

While the CAZ is recovering from the pandemic, in many areas the recovery is slower than the rest of the capital. Footfall has recovered more slowly: in July 2022, footfall in areas within the CAZ was on average 45% lower than July 2019. Both tube

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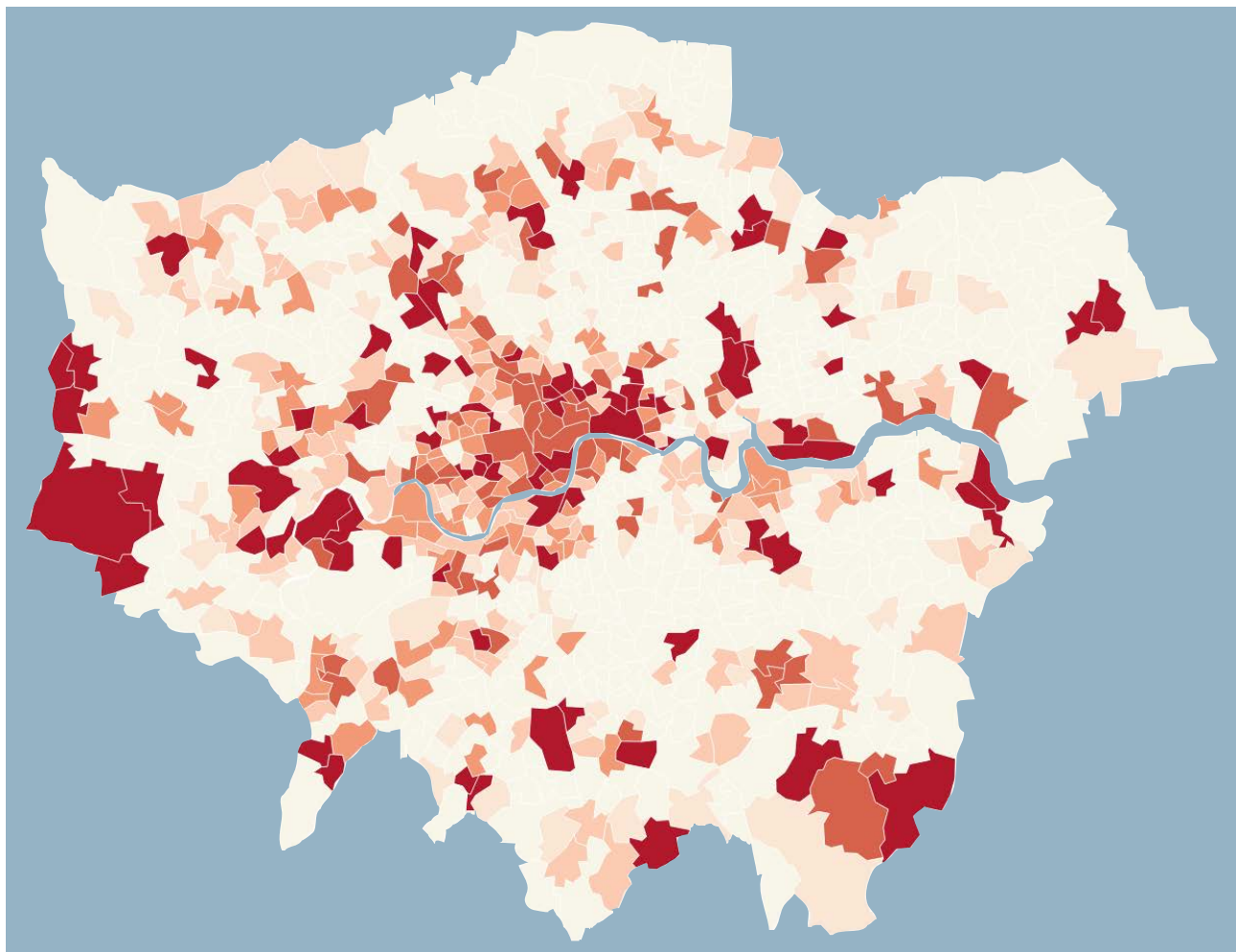
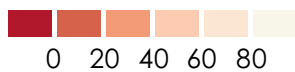
and bus ridership in the CAZ have recovered more slowly than across London as a whole (GLA Economics, 2022), and Google Mobility data shows that local authorities covering the CAZ have seen the biggest declines

in mobility. Similarly, spending in the CAZ has recovered more slowly than in the rest of the capital.

While the number of **international visitors** is recovering, it remains below pre-pandemic levels. Spending by visitors in the capital may not return

**Figure 5: Spending has recovered more slowly in the CAZ**  
**Weekday Mastercard spend, adjusted for inflation and increased card payments, Feb–July 2020**

Retail card spending real growth from February 2020 to March 2022  
Weekday physical sales, %



Mastercard spend index adjusted for increased card payments

Map data: ©Crown copyright and database right 2020, created with Datawrapper

to 2019 levels until 2026 ([GLA, 2022](#)). There are significant challenges facing the travel sector, including disruptions relating to staff shortages, price increases, and the need to reduce emissions. The CAZ will need to ensure it remains an attractive place to visit, actively drawing in people from across the UK and the rest of the world to experience its unique offer.

While we have seen a gradual return to the office, the number of **commuters** visiting the CAZ on a daily basis remains significantly below pre-pandemic levels, and more concentrated around the middle of the week ([Arup, 2022](#)). We are unlikely to return to the pre-pandemic model where most commuters worked 5 days a week in the office. In an age of hybrid working, the CAZ will need to adapt and evolve. This will mean ensuring it is a place where people actively want to come in to work, to collaborate, and to innovate. It will mean providing more flexible workspaces, and attracting in new businesses that might previously have not located in the CAZ. And while we will not see the death of the office, it will mean some mediated transfer of less in-demand office space to other uses.

Businesses in the CAZ and across the rest of the capital are facing **staff shortages** and difficulty recruiting the workers they need. A recent HOLBA survey of hospitality employers in the

West End found that one in five roles (19%) was unfilled, leading to significant lost sales for businesses.

### Challenges to the recovery

The **cost-of-living crisis** is not just an enormous challenge for Londoners, it is a threat to businesses and the capital's economic recovery. Rapidly rising inflation will lead to declines in household incomes and spending this year and next, and the UK is entering a potentially lengthy recession ([OBR, 2022](#), [BoE, 2022](#)). The decline in discretionary spending will hit many sectors in the CAZ – particularly those such as retail, hospitality, tourism, and arts and entertainment – which were hardest hit by the pandemic.

Beyond the impact on demand, businesses will also see growing cost pressures, including rises in energy prices, and increases in wage costs.

“The **cost-of-living crisis** is not just an enormous challenge for Londoners, it is a threat to businesses and the capital's economic recovery.”

# OUR VISION FOR THE CENTRAL ACTIVITIES ZONE



We are committed to driving an **inclusive and sustainable recovery** of London's Central Activities Zone, and ensuring the area remains **the beating heart of London**. To succeed after the pandemic the CAZ will need to offer:

- » **A unique habitat** – the CAZ will be an attractive place, where people want to visit and spend time, where people want to work, where businesses want to locate. It will be clean and green, with a high-quality public realm and local environment, where people feel safe, and where residents enjoy living.
- » **An unforgettable experience** – the CAZ will provide incredible experiences which are not available anywhere else in the capital, the UK or the world, and which actively draw people in. It will be a hive of creativity and culture, with a thriving visitor economy, and a diverse and high-quality hospitality, arts and entertainment, heritage and retail offer.
- » **A space for innovation and growth** – the CAZ will be the best place in the world for people to come together to collaborate and innovate. The exemplar of a net zero urban centre, the CAZ will have world-leading clusters in the industries of the future. This will drive productivity and growth, generating wealth for the whole of the UK, and providing high quality employment opportunities accessible for all Londoners, including CAZ residents and disadvantaged communities.

“We are committed to driving an **inclusive and sustainable recovery** of London's Central Activities Zone, and ensuring the area remains **the beating heart of London**.”

# A UNIQUE HABITAT



The CAZ has a unique public realm and built environment. Rather than being a single area, the CAZ is a patchwork of diverse centres and neighbourhoods, all with their own character and culture ([GLA, 2016](#)). Shaped by centuries of history, the CAZ is home both to ancient landmarks and to modern architecture; to buzzing centres of nightlife and to tens of thousands of homes; to world-famous squares and high streets, to beautiful royal parks, and to the majestic river Thames.

The CAZ is home to a huge concentration of offices and workplaces. The rapid rise of hybrid working means hundreds of thousands of office workers who previously had to travel into the office every day now have greater flexibility, with some days in the office and some days from home. This means the CAZ must be an attractive place which actively draws people in to work and which makes them want to stay and spend.

Hybrid working will lead to profound changes in how we use offices, but it will not lead to the 'death of the office'. Analysis by Arup commissioned by Central London Forward suggests that central London in general, and the CAZ in particular, are still attractive locations for businesses, and that demand for office space is likely to remain robust ([Arup, 2022](#)). There is evidence of a 'flight to quality' with an increasing demand

for high-quality and collaborative spaces. It is also clear that sustainability is becoming an increasing factor in company decisions on workspaces. Offices and workspaces are one of the largest sources of carbon emissions in the capital, so decarbonising the commercial built environment will be vital to achieving net zero ([City of London Corporation, 2022](#)).

The recent extension of permitted development rights is a significant risk for the CAZ. The rights allow landowners to convert commercial properties into housing without planning permission. While there is a need for flexibility in use of buildings, there are concerns that permitted development could lead to an uncontrolled and irreversible loss of offices, cultural venues and other workspaces, without creating the genuinely affordable housing needed. This could undermine the ability of London government to curate the CAZ and support its unique ecosystem. Article 4 directions can be agreed between government and local authorities to protect areas from permitted development, but at present much of the CAZ is not CAZ covered.

In addition to being a major commercial centre and a global tourist destination, the CAZ is also home to hundreds of thousands of Londoners. Almost a third of a million Londoners lived in the CAZ on the eve of the pandemic, with the population



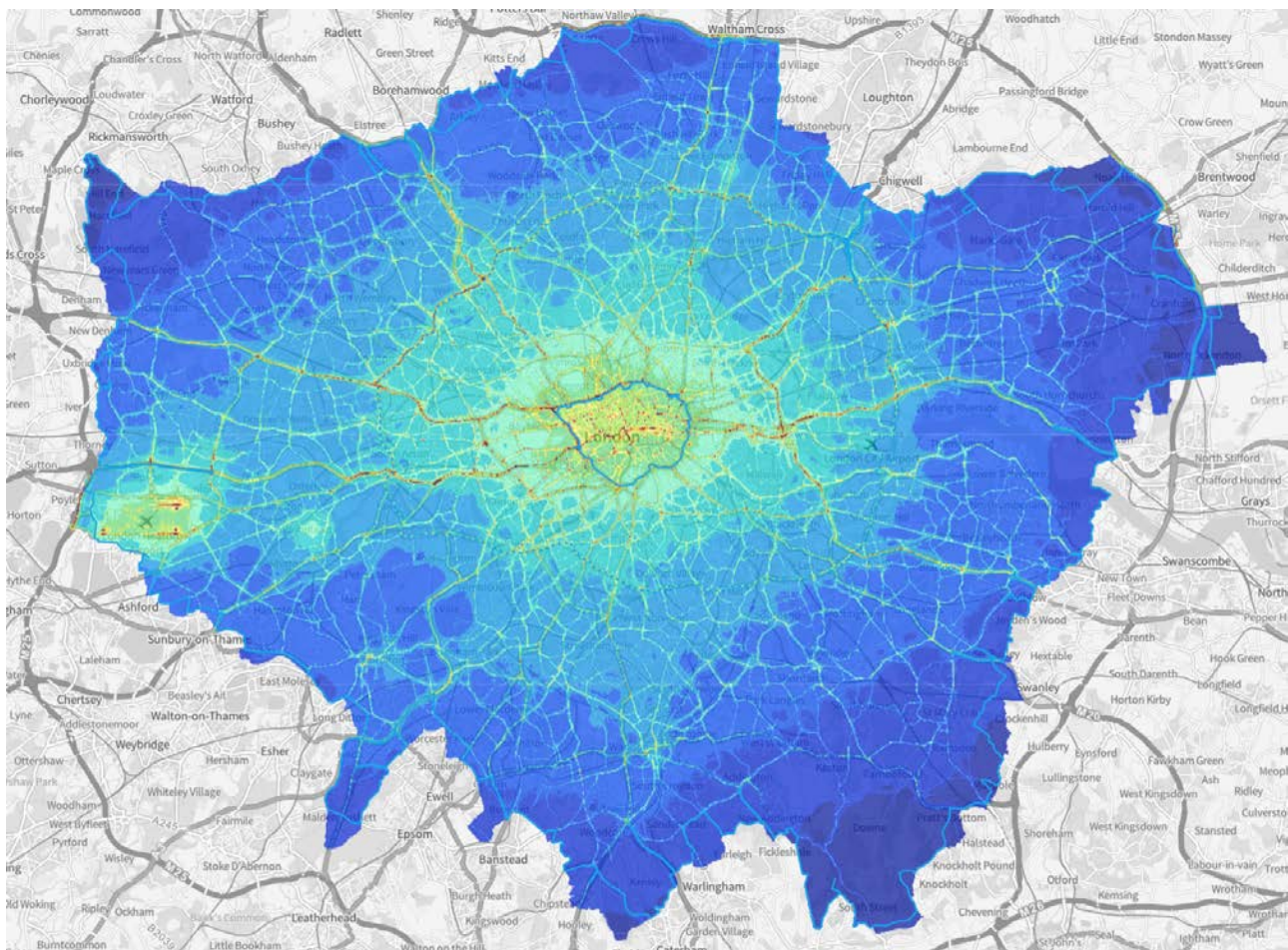
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increasing by a quarter over the previous decade – double the rate of the capital as a whole (GLA, 2021, ONS, 2019).

We want the CAZ to be a great place to live. Ensuring a high quality public realm and local environment is crucial for the residents and communities that call this area home.

London can and should continue to build homes in the CAZ to help address the housing crisis. Over the last 18 years, an average of 4,200 new homes were delivered in the CAZ each year (Planning London Datahub 2022). This equates to 1 in 10 new homes delivered in London. The London Plan identifies a potential capacity to accommodate

**Figure 6: Air pollution in the CAZ remains higher than the rest of London Nitrogen Dioxide (NO<sub>2</sub>) in London, 2019**



Annual average concentrations of Nitrogen Dioxide (NO<sub>2</sub>), 2019



Source: GLA, 2022

85,600 new homes in the CAZ Opportunity Areas to 2041, though this would need to be done in a way which protects the CAZ's vibrancy, which works alongside existing uses, and which provides the types of genuinely affordable housing we need ([GLA, 2021](#)).

There are challenges to the local environment in the CAZ. While progress has been made in tackling air pollution, as the map above shows, air quality remains poorer than across most of the capital, and pollution in parts of the CAZ regularly exceeds safe limits. With hundreds of thousands of tourists and millions of commuters visiting every day, there are huge pressures on street cleaning services.

The CAZ will have to adapt to the climate crisis. Both the Mayor of London and all the local authorities covering the CAZ have ambitious net zero targets, and emissions are declining. This will need to accelerate, and the CAZ will need to adapt to a warmer climate, with the risk of more extreme weather.

As a major urban centre, the CAZ faces issues with crime, particularly relating to acquisitive crime ([Met Police, 2022](#)). Tackling crime and promoting public safety is crucial to ensuring the CAZ remains a great place to live, and a place which attracts visitors, workers, and businesses.

Improving the quality of the local public realm and promoting community safety are crucial to the success of the CAZ, and to ensuring the area remains somewhere where people want to work, where businesses want to invest, and where people enjoy living.

### OUR VISION

- » *The CAZ will be a **unique habitat** – an attractive place where people want to spend time, to visit, to work and to live.*
- » *The CAZ will be clean and greener, with beautiful open spaces, and significantly lower levels of air pollution and traffic. The CAZ will have a substantially reduced carbon footprint, and it will be more resilient to the challenges of a changing climate. The CAZ will be safe, and it will feel safe. It will be accessible, inclusive and welcoming.*
- » *The CAZ will be a densely populated hub of activity – with increased office and housing availability. The CAZ will provide a range of high quality and flexible office space which reflects and enhances our thriving local economy. The CAZ will provide more housing – including more genuinely affordable homes – it will be home to more Londoners, and it will be a great place to live.*

### CASE STUDY – SKILLS FOR A SUSTAINABLE SKYLINE

A quarter of UK greenhouse gas emissions come from the built environment, with the proportion higher in the capital. Decarbonising the commercial built environment in the CAZ will be crucial to reaching net zero. This will require a vast workforce, with specialist skills.

City of London Corporation's [Skills for a Sustainable Skyline](#) taskforce aims to understand the skills that will be required to decarbonise the commercial built environment in central London, and to bridge the skills gap. It brings together employers, training providers, industry bodies, national and local government, to focus on three areas:

- » **Building the evidence base** on the planning pipeline, skills gaps, and barriers to action.
- » **Delivering impactful interventions** including setting out qualification pathways, unlocking finance for upskilling, and refining planning and procurement policies.
- » **Delivering an industry engagement campaign** to promote reskilling and upskilling of the workforce and raise career awareness among Londoners.

### Actions for London government

Local authorities and GLA will work in partnership with **Business Improvement Districts** (BIDs) to improve the quality and cleanliness of the public realm. Many BIDs already take a keen interest in cleaning and greening public spaces to make them more attractive both for visitors and residents. Local authorities will work together with existing BIDs to improve the public realm locally, and they will work with businesses to establish new BIDs where they are not present.

Local authorities and the GLA will work together with the Met Police and BIDs to **prevent crime and make the CAZ feel safer**. Preventing crime and promoting safety and security is already a major priority for BIDs in the capital ([LBAC, 2019](#)). Local authorities, GLA and the Met Police will seek to coordinate their community safety and crime prevention work with BIDs, and to make the CAZ feel safe and welcoming. Local authorities will deliver lighting strategies that both improve public safety, enhance the public realm, and reduce carbon emissions.

Local authorities and GLA will continue to **invest in high streets in the CAZ** and in improving the public realm. Local authorities will use their planning powers to ensure new developments provide high-quality and accessible public realm, including welcoming new public spaces.

The GLA and local authorities will **support active transport** and invest in the infrastructure that enables it. This will include expanding the network of bike lanes in the CAZ, and increasing the availability of cycle storage. Local authorities will explore opportunities to give more space and priority for pedestrians, and they will work with the GLA to actively reduce traffic in the CAZ.

The GLA and local authorities will seek to **reduce traffic and emissions relating to business activity in the CAZ**. This will include working with BIDS, Cross River Partnership, Port of London Authority, and the delivery and freight sector to consolidate deliveries, and to increase the use of sustainable modes such as rail, river, cycle and zero emission vehicles.

The GLA and local authorities will seek to **enhance access to and use of the Thames**. The redevelopment of the Thames, including South Bank, has been crucial to London's growth in recent years. City of London Corporation will open up the riverside at Queenhithe to complete the

Thames Path through the square mile. GLA and local authorities will work with Cross River Partnership and the Port of London Authority to increase the use of the Thames for passenger and freight transport.

Local authorities will seek to **green the public realm and increase resilience to climate change**. This will include increasing the number of street trees and pocket parks in the CAZ, and incorporating Sustainable Urban Drainage Systems to reduce the risk of flash flooding.

GLA and local authorities will work together to improve **accessibility for visitors**. This will include expanding step-free access on the TfL network, and increasing the availability of public toilets, especially accessible and Changing Places toilets in tourist estinations.

Local authorities will **agree Article 4 Directions with government and monitor the impact of permitted development rights on the CAZ**.

Article 4 Directions will protect important areas of the CAZ from uncontrolled transfer to residential use. Local authorities will also explore where less viable and in-demand commercial premises could be transferred to other uses, including good quality homes, working with landowners to facilitate this.

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Local authorities and the GLA will work together to **deliver housing** in the CAZ to meet the needs of Londoners. Both the local plans developed by local authorities and the next London Plan will set out how we can deliver this housing, alongside additional commercial floorspace. Local authorities will take a place-based approach, identifying where new homes could be delivered in a way which works alongside existing uses including through mixed-use developments. GLA and local authorities will work together to make better use of limited affordable housing funding, and will consider how flexibility on grant rates in the 2021-26 Affordable Homes Programme could support the delivery of more genuinely affordable homes in the CAZ.

Local authorities and GLA will **reduce carbon emissions relating to the built environment**. Local authorities will ensure embodied emissions are considered in decision-making, including through undertaking a 'whole life carbon analysis' approach. Local authorities will consider retrofitting where possible, to avoid unnecessary demolition and re-build. High environmental standards will be set for new homes and workplaces. Local authorities will support the retrofit and decarbonisation of existing commercial buildings, working closely with landowners, businesses, and the construction sector.

The GLA will work with the 10 CAZ local authorities to **explore the potential for a more collaborative approach to master-planning** for the area.

### Actions for London stakeholders

Transport for London (TfL) will **seek to boost passenger numbers and to maintain affordability and service levels**. A high quality and affordable public transport network is vital for the CAZ, enabling commuters to travel to work, and visitors to travel into and around the CAZ, whilst limiting car use. TfL finances have been hit hard by the pandemic, and fare revenue remains significantly below pre-pandemic levels. TfL will work to boost passenger numbers and revenue, in order to protect services and limit fare rises.

Cross River Partnership will work with CAZ-based businesses and central London local authorities to help them **reduce emissions** and improve air quality. This will include delivering Clean Air Logistics for London which aims to shift freight deliveries from road to the Thames.

BusinessLDN will work with business to develop a **new plan for London's built environment** post pandemic, through their Place Commission. This will help make recommendations to the Mayor for the next London Plan.

## Policy asks of central government

Central government should **ensure TfL has sustainable long-term funding settlement beyond April 2024** in order to keep London moving, enable investment in the network, and ensure public transport remains affordable.

Central government should **invest in active transport** to continue the shift away from car use. This should include ongoing funding for London boroughs as part of the next TfL funding settlement.

Central government should work with London government to **agree Article 4 Directions in order to protect the CAZ and review the impact of permitted development**. Undertaken in summer 2023, two years after the extension of permitted development, this review should explore the impact on commercial property, the quality of homes delivered, and potential changes to the policy. Central government should not extend permitted development further.

Central government should **ensure support and incentives are in place to drive the decarbonisation of commercial property**. Government should explore options, including removing VAT on refurbishments or incentivising investment through business rates.

## CASE STUDY – ELIZABETH LINE

The Elizabeth Line is a major new railway for London and the south-east. Stopping at 41 accessible stations – 10 of which are new – the line will carry up to 200m people each year.

The Elizabeth Line opened at a vital time for the CAZ. It increases central London's rail capacity by 10%, bringing 1.5m people within a 45-minute commute of the major employment centres in the CAZ. TfL estimate that it will boost the UK economy by £42bn.

TfL and GLA are seeking to maximise the benefit of this major new investment.

Central government should **introduce a registration scheme for short-term lettings to enable local authorities to enforce standards**. There has been a significant rise of short term lets in the CAZ. Many owners breach the 90-day annual letting limit, and short-term lets often cause nuisance for neighbours. Central government should introduce a registration scheme for short term lets, enabling local authorities to ensure rules are enforced.

# AN UNFORGETTABLE EXPERIENCE



Key to the success of the CAZ is its ability to offer unforgettable experiences not available anywhere else in London or the UK, which actively draw people in.

The CAZ is a hive of creativity and culture. From fine dining to street food from every corner of the world, and from centuries old pubs to trendy cocktail bars, the CAZ has something to meet every taste. From the cultural institutions of the South Bank and the Barbican, and the museums on Exhibition Road – all of which are accessible for free – to the theatres of the West End, and famous music and LGBT venues, the CAZ has a unique arts and entertainment offer. This is all situated in an area steeped in history, with a young and diverse population. There are few places in the world that can offer such agglomeration of creativity and culture, such a concentration of different attractions and such a range of unique experiences.

The retail sector has long been a vital part of the CAZ's economy, with visitors drawn to world-famous department stores, historic high streets and unique street markets. However, the growth of online retail has posed a challenge to the old model of city centre retail. In parts of the CAZ, there has been some deterioration in the quality of the retail offer, but in others, the sector has adapted, moving more toward

experiential retail, and service-based activities that can only be delivered in person.

The arts and entertainment, hospitality and retail sectors are crucial for the CAZ. They help draw in visitors from across the UK and across the world, and they make the CAZ a vibrant place where people want to work, and where businesses want to locate. They are major employers, particularly for young Londoners, those from Black and minority ethnic backgrounds. But while these sectors offer many good jobs, too much employment is low paid, insecure, and lacking in opportunities for progression.

The wider visitor economy is crucial for the CAZ. Before the pandemic, London was the third most visited city on the planet, and tourism supported one in seven jobs. London accounted for 53% of all visits to the UK, with an inbound spend of £15.7bn. The CAZ itself contains nine out of ten of the most visited tourist attractions in the capital ([Statista. 2022](#)).

The visitor economy was hit particularly hard by the pandemic. Most businesses and institutions were shut for months. Even when they were allowed to re-open, businesses continued to struggle due to the slow recovery in footfall, and social distancing requirements. While these sectors are bouncing back, the recovery has some way to go. Forecasts suggest spend by



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domestic and international visitors will not surpass pre-pandemic levels until 2026 (GLA, 2022).

Many businesses have still not recovered from the damage of the pandemic, and now face a deteriorating economic situation, and the prospect of a long recession. These sectors face growing skills shortages, rising energy costs, and a potential impact on demand as households cut back on spending.

In an era of hybrid working, the CAZ's role as a hub for social activity, creativity and culture is crucial to its ability to draw commuters back in to the city. At a time when the visitor economy is still recovering, the vibrancy of our hospitality, arts and entertainment and retail sectors will be vital to attracting tourists back to the capital.

### OUR VISION

- » *The CAZ will offer **unforgettable experiences** which are not available anywhere else in the capital, the UK or the world, and which reflect and celebrate the diversity of our city.*
- » *The CAZ will have a thriving and innovative hospitality, arts and entertainment and retail offer, and a 24-hour economy that is open to all. This will help ensure the CAZ*

*remains a destination of choice for visitors, and a place where businesses want to locate.*

- » *The CAZ's visitor economy should benefit all Londoners. Businesses will be able to access the workers they need, and they will provide decent employment opportunities accessible to all. The CAZ will be a great place to visit and a great place to live, with the needs of residents considered alongside visitors.*

### Actions for London government

GLA and local authorities will work with businesses to **identify opportunities to raise revenue from overnight visitors in order to invest in the visitor economy**. The large number of visitors in the CAZ generates significant revenues for central government, but little of this is captured locally. Any approach to raising new revenue should be designed in partnership with businesses, and should not be implemented before the visitor economy has recovered to at least pre-pandemic levels, and until the inflation crisis has eased. Any revenue raised should be ring-fenced to support and manage the impact of the visitor economy, including promoting London as a tourist destination, improving the local public realm, and addressing common challenges such as skills gaps. This could be delivered either through working

with Central Government to agree an overnight stay levy, or through a locally implemented voluntary scheme, such as a Business Improvement District for visitor accommodation providers.

GLA and local authorities will continue to support the **delivery of visitor marketing campaigns**. These will focus both on driving domestic tourism and encouraging Londoners to return to the CAZ, as well as promoting visitors from international markets. Local authorities will deliver campaigns to promote the recovery of the visitor economy – such as Destination City – including working with local BIDs. These campaigns will use messaging consistent with the overall London narrative, building on the success of 'Let's do London'.

GLA and CLF will **work with central London BIDs** to understand the benefits of more closely coordinated action between BIDs operating in the CAZ area, and the required support to deliver joint initiatives.

Local authorities and GLA will **animate the CAZ through promoting cultural and creative activities**.

This will include working with cultural institutions, creatives, and CAZ-based BIDs to put on a diverse range of creative activity, which activates the public realm, and draws people in. This will include the creation of the Culture Mile Business Improvement District in the City of

## CASE STUDY – PHILADELPHIA INVESTMENT LEVY

The Philadelphia Hospitality Investment Levy was introduced by the Philadelphia City Council in 2018 in order to increase overnight guest visits to the City of Philadelphia.

The levy charges 0.75% of room rental revenue at hotels with 50 rooms or more. The funds are used to bring business to the city, including attracting exhibitions and events.

The PHiL is governed by a joint board, bringing together hotel managers and the City of Philadelphia, who decide collectively how funding raised is spent.

London, which aims to promote culture and creativity in the north west of the City.

Local authorities and GLA **will work together with the retail, hospitality, arts and entertainment sectors to improve job quality and help residents into good work**. These sectors are crucial for the CAZ, but they have high levels of low pay and businesses face growing skills shortages. GLA and local authorities

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will seek to promote the London Living Wage and the Mayor's Good Work Standard in these sectors, so that they offer decent employment opportunities for Londoners, and they are better able to attract and retain workers. GLA and local authorities will ensure employment and skills provision supports residents to access employment in these sectors, including through the Mayor's Academies programme, AEB provision, and Bootcamps.

GLA and local authorities will work together to **support a thriving 24-hour economy**. Local authorities will develop a night-time strategy which sets out how they will support and manage the 24-hour economy in a way which works for businesses and visitors, while protecting resident amenity. These will be designed and delivered in partnership with local BIDs and communities, ensuring that the voice of business and residents are heard. TfL will ensure safe and effective night-time transport services including the Night Tube to help visitors and workers to both access the CAZ and get home safely.

Local authorities will seek **to maintain flexibility and streamline licensing and regulation** policies, building on the approach taken during the pandemic, to facilitate outdoor hospitality. The GLA will work with local authorities in the CAZ to develop a London-wide licensing framework which will provide

### CASE STUDY – DESTINATION CITY

Destination City is a major new programme which aims to transform the Square Mile's leisure offer. Managed by City of London Corporation and backed by annual investment of £2.5m, Destination City will involve a range of creative activity including outdoor festivals, music, art, theatre, sport and more. Developed to help drive the recovery of the City of London post-pandemic, Destination City aims to draw in visitors and workers, revitalise the City of London's streets, and reinvigorate local businesses.

Alongside the creative programme, Destination City will deliver improvements to the public realm including opening up the riverside walk at Queenhithe and opening the viewing platform at 22 Bishopsgate. Destination City will seek to reinvigorate the City's retail offer, and improve connectivity through a 5G infrastructure pilot.

a more consistent, joined-up approach to licensing. Local authorities will work with businesses and landowners to better utilise outdoor spaces, including for creative and cultural events.

## CASE STUDY – WEST END CURATION AND FUTURE OCCUPIERS

Westminster City Council, working in partnership with BIDs and property owners, is bringing vacant premises to life through a curated programme of retail and cultural activations. Established in early 2021, the first phase featured emerging artists and cultural organisations. Partnering with Heart of London Business Alliance (HOLBA), it aimed to test new uses for properties, to increase footfall and the diversity of audiences. The second phase sought to attract up-and-coming local and UK-based brands to deliver experiential retail. Working with New West End Company and HOLBA to support brands who would not have had the capital to operate from the West End.

The third phase is focused on the medium term. It is securing units for up to two years and aiming to incubate brands from pop-ups into

long-term, rent paying tenants, creating a pipeline of high-quality future occupiers. Owners provide the space rent-free, and the council funds fit-out and management, and applies business rates relief. The programme has activated 12 void units, supporting 40 brands, emerging artists, social enterprises, and start-ups.

Alongside this, Westminster is working with London & Partners, property owners and BIDs to refresh the district's occupier mix. There are two elements to the programme delivered by London & Partners: Promoting the West End internationally as a destination for international retail, hospitality and leisure brands to expand; and sourcing innovative new occupiers, convincing them to expand into the West End, and providing support to accelerate their launch.

Local authorities will work with property owners to **minimise vacant units** on high streets. This will include creative and original 'meanwhile uses' for currently unused spaces, including cultural facilities or community infrastructure.

Local authorities will **support the retail sector to evolve and thrive**. Working with BIDs and landowners, local authorities will seek to attract occupiers providing an offer that you can only get

on the high street, including experiential and service based activities. Local authorities will seek to foster a range of retail uses on local high streets at different price points, to ensure that high streets are inclusive for local communities. Local authorities will tackle the proliferation of low-quality retailers, which are impacting upon the attractiveness of the CAZ, and which are in many cases evading business rates.

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GLA will **provide data to monitor the health of CAZ high streets** through the High Street Data Service, working with local authorities to ensure the data informs decision-making.

### Actions for London Stakeholders

Business Improvement Districts will work with their members to deliver **marketing campaigns and discount schemes** to attract visitors and workers back to the CAZ, such as Camden Town Unlimited's Camden Green Loop and HOLBA's Heart of London Club.

London & Partners will lead on the implementation of the **London 2030 Tourism Vision**. Developed with boroughs, business groups and industry stakeholders, the vision provides a framework for businesses working in the sector to base their individual strategies on.

Cultural and entertainment venues and organisations will explore the potential of developing a **CAZ cultural quarters forum**, to enable more coordinated activity and campaigns across cultural institutions. This forum would explore the potential of large-scale joint approaches on topics such as dynamic ticketing, pooled local offers and 'cultural subscriptions'.

### Policy asks of central government

Central government should **protect businesses from the impact of rising energy prices**. Businesses and cultural institutions in the CAZ face both rapid increases in energy prices, and a decline in consumer spending due to the cost-of-living crisis. Government has announced that it will support businesses and other non domestic energy users with their energy costs up to the end of March 2023. However, energy prices are expected to remain high for many months beyond. Government must ensure that sufficient support is in place beyond the initial scheme to help businesses and cultural institutions in the CAZ with high energy costs. This could include a cap on the price of energy for businesses, or grants, or VAT relief targeted at vulnerable sectors and businesses.

Central government should **re-introduce the VAT Retail Export Scheme**. The VAT RES allowed non-EU visitors to the EU to recover the VAT on purchases they make on the high street. The scheme was withdrawn in 2021, leaving the UK as the only country in Europe not to offer tax free shopping, and putting London at a competitive disadvantage compared to other major tourist destinations. CEBR estimated that an end to the VAT Retail Export Scheme for non-EU visitors would lead to a reduction of non-EU visitors by 7%, with GVA falling by £1.8–£2.8bn

across the UK. The government announced its intention to re-introduce a digital version of the VAT RES in September, before scrapping the plan in October. Central government should reintroduce the VAT RES and develop a digital version of the formerly paper-based claims system. This would attract more international visitors and incentivise spending in the CAZ and across the whole UK.

Central government should **reform business rates to level the playing field**. Commercial space in the CAZ is among the most expensive in the world and business rates in central London are significantly more expensive than other locations. Government should reform business rates, and introduce an online sales tax, in order to ensure a fairer burden of taxation between bricks and mortar shops and online businesses.

Central government should **work with sectors facing skills shortages** to help them meet their skills needs. In addition to incentivising investment in the UK-based workforce, this should include ensuring that the visa system enables employers in retail, hospitality, and arts and entertainment sectors to access the migrant workers they need.

Central government should ensure the capital and the rest of the UK **remains open to international tourists**. This should include improving the passenger experience at major

ports of entry, by working with major airports to ensure sufficient staffing and capacity. Government should also review the approach to tourist visas, so that international tourists from outside of Europe with a visa for the Schengen Zone can also enter the UK during their trip.

Central government should **ensure arts provision in London is adequately funded**. The thriving arts and creativity sector in the capital benefits the whole of the UK. However, under the levelling-up agenda, arts funding has been shifted from London to other parts of the UK. While there is a need to invest in arts across the UK, this should not come at the expense of the capital.

“The CAZ will offer **unforgettable experiences** which are not available anywhere else in the capital, the UK or the world, and which reflect and celebrate the diversity of our city.”

# A SPACE FOR INNOVATION AND GROWTH



The CAZ is a world-leading centre of business and innovation, and an engine of growth for the UK. Central London has among the highest levels of productivity of any sub-region in Europe ([ONS, 2018](#)). This productivity is driven by innovation, skills, and agglomeration.

The CAZ is a hub for **innovation**. It is home to businesses that are at the cutting edge of their industry, and to world-leading clusters in sectors from digital and life-sciences, to finance and professional services. The co-location of an interaction between these knowledge intensive sectors is crucial to the CAZ's innovation economy. The CAZ is home to a unique cluster of academic institutions, with four of the top 40 universities in the world ([THE, 2022](#)). These universities are highly networked to industry, and to innovation districts including the Knowledge Quarter and SC1.

The CAZ benefits from a highly **skilled workforce**. Businesses have access to a large labour pool across the capital – which has the highest level of skills of any part of the UK – and the wider southeast. The CAZ is a magnet for global talent, with skilled people from across the world wanting to work here.

The concentration of innovative businesses and sectors within the CAZ delivers significant **agglomeration** benefits. Businesses in the CAZ benefit

from the opportunity to network and collaborate with others in the same sector, in similar sectors, and in academic and scientific institutions, leading to spill overs between firms and sectors ([West End Futures, 2022](#)). The concentration of businesses supports ready access to supply chains and to skilled workers. This leads to agglomeration economies of scale, which drive higher productivity ([Voltera, 2014](#)).

The transition to net zero is not just an environmental necessity, it is an economic opportunity. Research commissioned by Central London Forward shows central London is already a leading centre for the green economy, with a particular concentration of jobs in green finance in the CAZ. The sector is expanding rapidly, with the number of green jobs set to double this decade, and double again by 2050 ([WPI Economics, 2022](#)). Seizing the opportunities offered by the transition to net zero will be vital for the future economic success of the CAZ.

In an era of hybrid working, the future success of the CAZ and its role as an engine of growth rests on it remaining a place where people want to come together to collaborate and to innovate. It will need to remain a place where businesses want to invest, and a place where workers want to come in to work, with a focus on the collaborative activities that



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are best done in person. It will need to remain a place with a range of cutting-edge clusters, with close links between businesses and academic institutions, and a diverse and highly skilled workforce.

However, while the continued success of the CAZ's economy will provide opportunities for Londoners, not all Londoners are able to access the high skilled, high paid job opportunities available. Even when the capital's economy has thrived, significant pockets of poverty and deprivation have remained. Some groups – including Londoners from Black and minority ethnic backgrounds and women – are under-represented in the higher paying sectors in the CAZ. London needs levelling up too; if we want the recovery of the CAZ and the capital to be inclusive, more must be done to ensure all Londoners can share in the success of their city.

### OUR VISION

- » *The CAZ will be a world-leading space for innovation, a globally competitive business centre, and an engine of growth for the whole of the UK.*
- » *The exemplar of a net zero urban centre, the CAZ will be home to clusters in the industries of the future, linked up to world-renowned education and scientific institutions, and a skilled workforce. In an era*

*of hybrid working, the CAZ will be a space where people choose to come together for collaboration and innovation. It will be both a place which attracts global businesses to invest and to create jobs, and a great place to start and grow a business.*

- » *The success of the CAZ will generate wealth for the whole of the UK and opportunities for all Londoners. Through working together, we will ensure all our residents and communities can benefit from the opportunities available in their city.*

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### Actions for London government

The GLA, local authorities and other stakeholders including London and Partners, will **continue to market London as the number one location to do business**, particularly in relation to emerging and growing markets such as fintech and life sciences.

The GLA and local authorities will work together with businesses and cluster organisations to support **world-leading innovation districts, focused on the key sectors for London's future** including life sciences, digital technology and the green economy. This will include driving existing innovation districts such as the Knowledge Quarter and SC1, as well as exploring the potential for new innovation districts that

## CASE STUDY – KNOWLEDGE QUARTER

The Knowledge Quarter (KQ) is an innovation district in Camden. A world-class cluster for life sciences, data, technology, and cultural and creative industries, the KQ brings together over 70 businesses, education institutions, museums, galleries and libraries. The KQ is expanding, and it will soon be home to Google's European HQ, a new extension of the British Library and the UK Dementia Research Institute. The co-location of innovative businesses and research-intensive universities helps support knowledge sharing, and attract highly skilled workers.

The KQ is located in an area which suffers from disadvantage. The KQ 2050 Strategy, jointly developed with Camden Council, sets out a vision for the KQ to be not just a leading centre for innovation, but *'a place that delivers inclusive opportunities for local residents, regardless of their means, to fulfil their social and economic potential.'* Camden Council is focused on ensuring the opportunities generated are accessible to local residents. Their employment and training programmes work closely with KQ employers, providing pathways into KQ organisations, and promoting the Living Wage.

build on and grow existing clusters. London government will provide support through strategic planning, addressing skills gaps, and attracting inward investment.

The GLA and local authorities will seek to make the CAZ an exemplar of a **net zero urban centre**. City of London Corporation will support the development of the skills base to decarbonise the commercial built environment through the Skills for a Sustainable Skyline project. GLA and local authorities will seek to drive the growth of green jobs in the CAZ – including through making the City

of London the world centre for green finance. GLA and local authorities will seek to ensure Londoners can benefit from the opportunities that will be created by supporting the development of green skills, including through the LSBU Green Skills Hub. Central London Forward will measure the growth of the green economy and monitor emerging skills gaps.

The GLA and local authorities will work together to **improve digital connectivity in the CAZ**. The GLA and local authorities will work together with digital providers to expand access and capacity through an accelerated roll

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out of digital infrastructure – delivering world-class mobile connectivity and gigabit-capable broadband. The GLA will expand the availability of free 4G and 5G mobile connectivity on the underground network through the 20-year concession with BAI Communications – eradicating the biggest not-spot in the CAZ.

Local authorities and the GLA will work together to **ensure businesses have the skills they need to thrive, and that Londoners benefit from business growth**. GLA and CLF will work with business groups developing London's Local Skills Improvement Plan, which will set out the skills need of employers including those based in the CAZ. GLA will support education and training providers to respond to employer skills needs identified in the

LSIP, including through Adult Education Budget Funding. GLA and local authorities will ensure residents – including those who grew up in the CAZ, and those from disadvantaged backgrounds – are able to access high quality employability and skills support to help them into employment opportunities in growth sectors of the economy.

Local authorities and GLA will work together to provide **high-quality business support**. Local authorities will provide a business support offer tailored to the needs of local businesses. This will include support focused on under-represented groups – including women and Londoners from Black and minority ethnic backgrounds – to start and scale a business. The GLA

### CASE STUDY – SC1

SC1 is a life science district based on the South Bank. Founded by Lambeth and Southwark Councils, alongside Kings Health Partners and Guy's and St Thomas' Foundation, SC1 aims to bring together leading NHS organisations, universities, and cutting-edge businesses to promote collaboration and connection, and to accelerate innovation and growth.

SC1 is planning to create new workspace for health and life sciences, increase employment opportunities, support new innovative business, and develop cultural programmes. This includes a 2-year life sciences entrepreneurship project led by Lambeth Council, which seeks to attract healthcare start-ups to the area, support the growth of early-stage companies in the cluster, and develop soft infrastructure to stimulate a vibrant life sciences community.

## CASE STUDY – SUSTAINABLE VENTURES HUB

Sustainable Ventures, Europe's largest support ecosystem for sustainable start-ups, has expanded into new headquarters within central London landmark, County Hall, providing affordable workspace exclusively for new companies innovating in climate tech or green business. Membership benefits also include access to a range of services, supporting members across their entire business journey. The environment enables opportunity for collaboration, peer-to-peer learning, access to investors and expertise in securing non-dilutive grant funding, alongside opportunities created by chance conversations within its corridors and meeting spaces.

The century-old building currently houses more than 50 pioneering sustainable businesses working to support the UK's drive towards a net zero economy. With a fast-growing waiting list, the County Hall space is now set to expand over 40,000 sq.ft. of space, hosting more than 100 climate tech organisations by early 2023. The project development costs of more than £5 million have been co-funded by Sustainable Ventures, Lambeth Council and Big Issue Invest through one of their private institutional debt funds.

will provide specialist business support for high growth potential businesses, helping them scale up and create opportunities. Local authorities and the GLA will ensure businesses seeking to reduce their emissions are able to access advice and support.

Local authorities and GLA will seek to **increase the availability of affordable workspace**, helping ensure there is space for businesses to start-up, grow and thrive. Local authorities and the GLA will work together to develop a publicly

available CAZ workspace provider list, making it easier for businesses to find the workspace that is right for them.

Local authorities and GLA will **support local small and diverse businesses to access opportunities through procurement**, both at local authorities and at other anchor institutions within the CAZ. This will include piloting new ways of procuring goods and services to foster wider social, economic, and environmental benefits.

### CASE STUDY – CAMDEN COLLECTIVE

Created by Camden Town Unlimited and supported by Camden Council, Camden Collective is a charity offering free hotdesking space and subsidised offices to start-up businesses. Collective takes on temporary leases of empty buildings and brings them back to life, filling them with an ever-growing community of creative people; giving them free space to start their business, take risks, experiment, learn from each other and grow.

Migratory in nature, Collective has occupied 18 buildings since 2009, ranging from single occupier shops to a vacant hospital with room for 500 members. Initially funded by grants and Camden Town Unlimited, since 2015 Collective has been self-sufficient, using income from offices let at around 1/3 of market rate to provide its free space and activities.

Local authorities and GLA will work together to help **transfer unspent apprenticeship levy funds** to local SMEs and start-ups based in the CAZ, including through working with the London Progression Collaboration.

### Actions for London Stakeholders

London and Partners will work with central London local authorities to **attract international businesses** to locate in and invest in the capital, helping to create jobs and drive growth in the CAZ and across London.

BusinessLDN will work with other London business organisations and businesses across the capital, with CLF and with central London boroughs, to **develop London's Local Skills**

**Improvement Plan.** This will set out the skills needs of businesses in the CAZ and beyond, and inform the development of London's skills system.

BusinessLDN will act as a conduit for **bringing the private and public sector together** to tackle issues affecting the capital's competitiveness.

BIDs will continue to **act as partnership builders** within their areas, engaging with member businesses, and supporting innovation and growth.

### Policy asks of central government

Central government should **co-invest in accelerators and cluster organisations** like MedCity in order to ensure they are properly resourced

to succeed, and to build on our competitive advantages, benefitting the whole of the UK.

Central government should **explore the potential for further devolution of employment and skills services** to London and other areas, so that the system better meets the needs of local businesses. Building on the devolution of the Adult Education Budget, this could include full control over Skills Bootcamps, devolution of future DWP employment programmes and future rounds of the UK Shared Prosperity Fund and control over apprenticeship system.

Central government should **ensure businesses are able to access global talent**. In order for the CAZ to remain a world-leading business centre, employers based here need to have access to highly skilled workers (City of London, 2021). In addition to investing in the skills of local residents, businesses often need to recruit internationally. Government must ensure that the visa system enables employers to bring in the skilled workers they need.

“The success of the CAZ will generate wealth for the whole of the UK and opportunities for all Londoners. Through working together, we will ensure all our communities can benefit from the opportunities available.”

# DELIVERING THE CAZ FUTURES ACTION PLAN



Central London Forward, the GLA and the local authorities covering the Central Activities Zone are committed to delivering the CAZ Futures action plan, and to working together to drive the recovery and evolution of the CAZ.

A CAZ Futures Working Group will be formed to bring together Central London Forward, the GLA, and the CAZ local authorities with business groups including Business Improvement Districts to oversee the implementation of the action plan.



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## Central London Forward

1st Floor  
West Wing, Guildhall  
London EC2V 7HH

Email: [centrallondonforward@cityoflondon.gov.uk](mailto:centrallondonforward@cityoflondon.gov.uk)

Website: [centrallondonforward.gov.uk](http://centrallondonforward.gov.uk)

Twitter: @CLF\_news

LinkedIn: [linkedin.com/company/centrallondonforward](https://www.linkedin.com/company/centrallondonforward)

[designbysoapbox.com](http://designbysoapbox.com)