

The Hourglass Economy

An analysis of London's labour market

February 2016



Economy Committee Members

Fiona Twycross (Chair)	Labour
Stephen Knight (Deputy Chair)	Liberal Democrat
Tony Arbour	Conservative
Jenny Jones	Green
Kit Malthouse MP	Conservative
Murad Qureshi	Labour
Dr Onkar Sahota	Labour

Contact:

Matt Bailey
Scrutiny Manager
Email: economycommittee@london.gov.uk
Tel: 020 7983 4014

For media enquiries:
Lisa Lam
Email: lisa.lam@london.gov.uk
Tel: 020 7983 4067

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Chair's foreword



London's is a strong and resilient city economy. It is the motor of the UK economy with far higher productivity and output compared to the rest of the country.

But while London's economy, and in particular its labour market, have returned to pre-recession levels in many areas, there remains a hangover from the recession that is masked by the headline figures.

Despite growing wealth and employment, London is a highly polarised city and suffers the greatest level of pay inequality of any region in the UK.¹ The reality is that for those who work on low-pay or with insecure contracts, have dependent children at home, or left school with few qualifications, living and working in London can be an everyday struggle.

Dig beneath the shiny veneer of the headlines and we see a different picture from that which many of us recognise.

It doesn't have to be like this. Following the 2008 global financial services crash, employment in London – and across the rest of the country – remained buoyant, with businesses responding to the downturn by reducing hours, introducing greater casualisation, and freezing pay in order to protect jobs. Now, as the economy sees renewed growth and profits stabilise, employers must be challenged to reverse these trends.

In this report, we contextualise the numbers with insights from those who have experienced first-hand the changes in the labour market since the recession. And we build a case for action to improve job quality, contractual arrangements, opportunities for flexible working and better pay over the course of the next Mayoralty.

Everyone deserves to live and work without insecurity, or fear of poverty. Now is the time to press for stable, quality, well-paid jobs for each and every Londoner.

A handwritten signature in black ink, appearing to read 'Fiona Twycross'. The signature is fluid and cursive.

Fiona Twycross AM
Chair of the Economy Committee

Executive summary

London's economy has shown good signs of recovery following the 2008 financial crisis. The capital's economic growth^a since 2008 has been stronger than the rest of the UK, and job creation has been especially notable. Due in large part to the strength of its finance and real-estate sectors, as well as a large highly skilled workforce and unrivalled international reputation, London's economy appears, on the surface, to have survived the recession relatively unscathed.

Keeping up appearances

As far as the labour market is concerned, its fundamental structure has not changed significantly since 2008. If anything it has outwardly improved. The unemployment rate reached its lowest ever level in 2015, down from eight to six per cent over the period, while the employment rate increased from 71 to 73 per cent,² resulting in a greater proportion of the population in employment than before the economic downturn.

But dig a little deeper

...and the headline employment figures mask a reality which, for many Londoners, is far more challenging than it was before the crash. We have identified four key features of the labour market which require Mayoral attention:

1. Productivity

Between 2008 and 2013, productivity, the measure of output per worker, grew at a slower rate than the rest of the UK.³ This appears, to some extent at least, to be tied to a skills shortage in the labour market.

Employer confidence in the skill level of young people entering the labour market is diminishing and employers say they are struggling to recruit sufficient workers for the growing number of high-skilled roles, which increased as a proportion of workforce jobs from 51 to 53 per cent between 2008 and 2015.⁴

Concurrently, the labour market has become 'hollowed-out' with a 13 per cent decline in the proportion of mid-skilled jobs over the period.⁵ When combined with lower investment in workplace training, the result is reduced opportunities for progression of low-skilled workers into higher skilled and better-paid jobs.

^a Gross Value Added (GVA) in nominal terms (i.e. without taking account of inflation).

2. Flexibility

In order to maintain employment levels and hold on to skilled employees, despite lower revenue during the downturn, businesses made changes to the nature of jobs on offer, and conditions under which people were employed.

In particular, there was a move towards increasing the use of part-time and temporary contracts. The proportion employed on such contracts increased from 25 to 29 per cent between 2008 and 2015.⁶

Although quality^b, well-paid flexible working can be of great benefit to workers, particularly those with caring responsibilities, there are indications that flexible arrangements designed with the worker in mind were few during the downturn and have seen limited improvement since.

Many of the flexible contracts in use – such as minimum-hours contracts – are clustered at the lower end of the labour market. And the proportion of part-time jobs paying less than the London Living Wage (LLW) is around four times higher than the proportion of full-time jobs paying less than the living wage.⁷

In order for businesses to save costs, such contracts do not convey automatic employee rights such as sick-pay. Workers are therefore reliant upon the good will of their employer to grant sufficient hours, wages, training, and access to benefits.

Conversely, at the upper end of the labour market, opportunities for flexible working are rare. Only three per cent of jobs advertised in London, with a salary greater than £20,000 (FTE), are either part-time or open to flexibility.

3. Exclusion

London's labour market is, arguably, less inclusive than other regions. Lower wages and poorer career prospects, coupled with the increasing cost of childcare, housing and transport, make working in the capital even less accessible to certain groups, in particular women and those aged under-24.

The employment rate for mothers and lone parents in London lags behind that of the rest of the UK at 62 per cent compared with 71 per cent.⁸ And although it is not unique to London, women are more likely to be paid less than men, with 24 per cent of all female jobs paid below the LLW compared with 17 per cent of all male jobs in the capital. For young people, 49 per cent of jobs carried out by 18 to 24 year olds in London were paid less than the LLW.⁹

4. Low Pay

Finally, stagnating pay and the increasing cost of living since 2008, particularly housing, childcare and transport, have made life in London increasingly

^b Categorized by Timewise Foundation as jobs paying more than £20,000 FTE

unaffordable for some workers. The proportion of London's jobs paying less than the LLW increased by 54 per cent from 2008 to 2015.

There is evidence that for many, particularly those trapped in low-pay, low-skilled jobs, the growing gap between pay and cost of living has led to an increased likelihood of living in in-work poverty.

Introduction

London is the motor of the UK economy: its gross value added accounts for more than 22 per cent of the UK total. London's growth since 2008 has been stronger than the rest of the UK's and its labour market has outperformed other regions. There are now 12 per cent more jobs in London than at the pre-recession peak in 2008, compared with four per cent in the rest of the UK.^c

However, the headline figures do not reveal the full complexity of the relationships between these macro-economic statistics and the often intangible elements of employment which affect our quality of life.

To fully understand the experience of London's labour market for all those who participate in it, we must also consider:

- the quality of the available jobs;
- the types of people who are able to access those jobs;
- the skills of the people able to access those jobs;
- the number of hours which people work;
- the wages and benefits they receive;
- the opportunities available for London's workers to progress in their careers, earn higher wages and develop new skills; and
- the resulting productivity of those workers.

We have found that, when the full picture is taken into account, London has performed less well against these factors, between 2008 and 2015, than the headline figures might suggest. In four areas in particular (skills and productivity; job quality; inequality; and wage growth), the underlying performance of the labour market is letting many Londoners down.

The purpose of this investigation

These four areas were identified by the Mayor, alongside overall job numbers, as economic priorities for his mayoral term. He explicitly recognised the need "to give all Londoners the opportunity to take part in London's economic success, access sustainable employment and progress in their careers."¹⁰

As the dust of the financial crash settles, the data indicates a strong recovery, and the Mayor has been quick to claim it as a victory. However, it has become increasingly clear that, for some at least, the labour market now is a less positive place in which to work than prior to the downturn.

^c All economic data, unless otherwise stated, is taken from the GLA Economics publication, commissioned by this Committee, "London's changing economy 2008-15", which can be found here <https://www.london.gov.uk/sites/default/files/london-changing-economy.pdf>

1. The productivity puzzle

Key issues

High-skilled, professional jobs are growing, buoyed by the competitive strength of London's service economy. However, employers are finding it hard to recruit sufficiently skilled staff for the roles available.

There are indications that many members of London's workforce are becoming trapped at the lower end of the labour market or in jobs which are below their potential, as mid-skilled roles have been eroded.

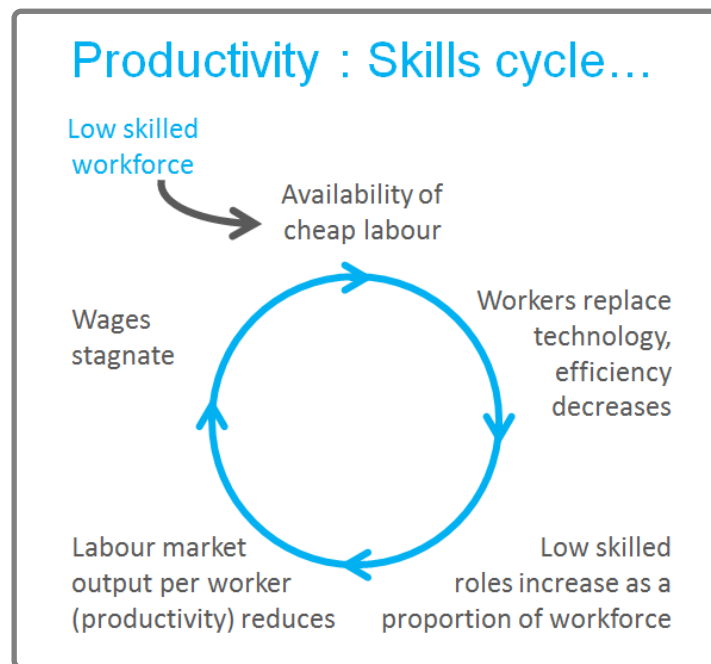
As a result, overall labour market productivity^d has been reduced as high-skilled jobs stand vacant, and the proportion of the workforce in low-skilled jobs increases.

- 1.1 Labour market economists have been talking, since the end of the recession, about a so-called "productivity puzzle". While outwards signs of economic recovery have been positive, particularly in terms of overall employment and overall economic output, productivity, the measure of output per worker, has shown no such improvement.
- 1.2 Indeed, London's productivity grew at a slower rate from 2008 than the UK as a whole. There are indications this has much to do with underlying changes in the composition of the labour market, as defined by the level of skill of those in work. Reasons mooted by the Bank of England include:
 - Concentration of jobs growth in lower-skilled occupations and among employees with fewer qualifications and those who are new to their roles.
 - Poor job progression and promotion opportunities, preventing people taking up roles in which they might operate at their maximum level of productive potential.
 - Cheap labour has meant that organisations have had little incentive to invest in operational efficiency savings. In particular, weaker investment in 'intangible' capital, such as employees' skills, may have reduced the pace of innovation, and hindered the ability to adopt more innovative processes.
 - Poor quality of jobs produced in terms of both pay and job satisfaction.
 - Organisations have consciously chosen to hold onto workers with company-specific skills.¹¹

^d A measure of output (Gross Value Added) per worker or per hour worked.

- 1.3 During our investigation, we heard from Ian Brinkley, of the Work Foundation, that the reason the relative number of lower skilled jobs in London increased from 2008 to 2015 was that the availability of lots of cheap labour during the recession removed the need for workforce efficiencies to be made, through automation and technology. This had a related impact upon the overall productivity of the labour market, as worker output per hour is lower in such jobs.

Figure 1: There is a link between skills and productivity in London's labour market.



Source: London Assembly analysis of theories on productivity

- 1.4 At the same time, jobs in the middle of the labour market (skilled administrative, manufacturing and trade jobs) were increasingly hollowed out as the proportion of jobs in occupations categorised as mid-skilled saw a 13 per cent decrease (from 20 to 18 per cent) between 2008 and 2015.¹² This, in turn, limited the opportunities for workers in the lower economic categories to progress upward, into better paid, higher-skilled roles, thereby increasing further the pool of available low-skilled, low-paid workers and reducing the incentive for businesses to seek efficiencies.
- 1.5 We also heard from the GMB Union, that contracting out of certain job roles in the public sector has been a significant contributor to the reduction in mid-skilled jobs, and lack of progression from low- to mid-skilled roles. Contract companies work on a lean basis, with fewer managers and specialists, providing very few mid-skilled roles or promotion opportunities. Additionally, contract workers are removed from the main pay spine of the organisation they contract for, reducing their opportunities to progress within that organisation. Where once someone might have entered as a typist and

progressed to a middle-manager, this now rarely happens. This phenomenon applies in a similar way to private sector organisations which physically move their back-office functions away from their core operations.

- 1.6 The Federation for Small Businesses (FSB) suggested that the reduction in mid-skilled roles was also linked with a business desire to keep hold of high-skilled employees. It explained that redundancies were limited during the downturn as businesses recognised the value of keeping hold of skilled, trained staff. However, there was less work for those in employment to do, and so they worked at around two-thirds of their capacity. This not only reduced productivity, but resulted in high-skilled workers filling their time with mid-skilled tasks which might otherwise have provided employment for a lower-skilled or less-qualified worker.

Not enough skilled labour

- 1.7 The desire to keep hold of skilled staff is indicative of another growing skills challenge in the labour market: a shortage of workers for the growing number of high-skilled roles available.
- 1.8 Since the downturn, we have seen relative growth not only at the bottom of the labour market, but also in London's three top economic categories (professional services, healthcare and education), owing to their competitive strength internationally. ONS figures reveal that the proportion of workforce jobs¹³ categorised as higher-skilled¹⁴ has grown from 51 to 53 per cent since 2008, adding further to the "hourglass" nature of London's economy.
- 1.9 This should, in theory, be a positive development in terms of productivity and overall output. However leading business representative organisations, including the FSB, London Chamber of Commerce and Industry (LCCI), and Confederation of British Industry (CBI) have highlighted a growing shortage of highly skilled workers. The CBI, in their 2015 annual education and skills survey, found that "Most jobs created in the decade 2012-2022 are expected to be high-skilled ones." Yet, 55 per cent of employers surveyed are "not confident of being able to recruit sufficient high-skilled employees in future."
- 1.10 As we heard from the Greater London Authority:

"The skill system is behind the times. [Providers] deliver a high set of skills, but they are not the skills that a particular sector would need. We have calculated that about 22% of the higher-level skilled jobs are vacant. That is affecting businesses' ability to be productive and deliver."
- 1.11 Indeed, although London's schools have some of the best outcomes in the UK, there appears to be a mismatch between the skills which school-leavers and graduates have, and those which employers want to see. Separately, there are indications that investment in basic workplace skills and training, including in formal education, has declined. For instance, Timewise

Foundation report that there have been significant cuts to English for Speakers of Other Language (ESOL) training as a result of cuts to the adult skills budget. To put this into context, half of the country's ESOL provision is delivered in London.¹⁵

- 1.12 Running alongside this, as we have highlighted in previous work,^e is a lack of tailored, practical careers advice, not only for school leavers but for continued adult advancement, particularly for those who are locked into low-pay professions and wish to advance.

^e See the Economy Committee's 2013 report, *Tailor Made: Improving Adult Careers Services*

2. Flexible – but for who?

Key issues

In order to maintain employment levels during the downturn, businesses made changes to the nature of jobs on offer and conditions under which people were employed.

At the lower end of the labour market, contracts have become increasingly casual with more people working on part-time or temporary contracts, characterised by insecure hours, low pay, and few benefits.

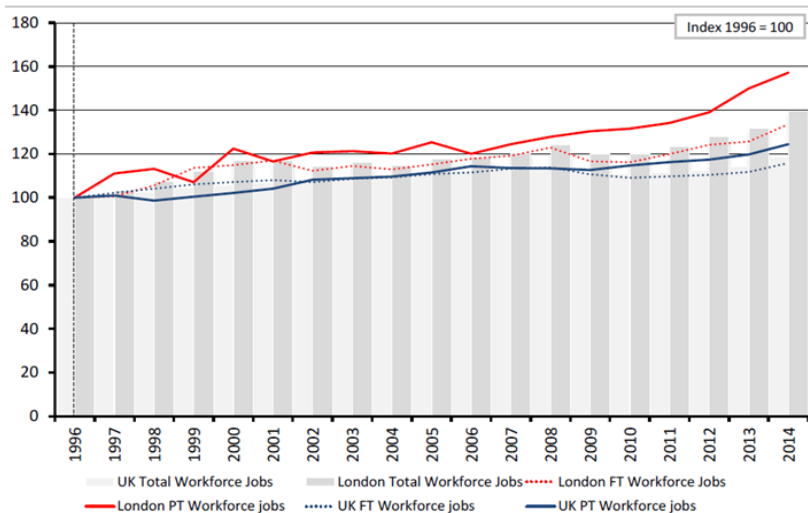
At the upper end of the labour market, employers have been unwilling to create new opportunities for jobs to be done more flexibly.

Despite the recovery, employers have been slow to begin to re-design jobs on the basis of how, where and when people work and want to work.

Flexibility is on the up

- 2.1 There has been a clear growth of part-time jobs in London. Figures show that, since the recession, growth in part-time and full-time jobs was 23 per cent and nine per cent respectively (reaching 1,583,000 and 3,991,000).¹⁶ Indeed, as figure 2 shows, the growth rate of part-time jobs in London has exceeded that of full-time jobs since 1996, with the gap widening in recent years.

Figure 2: Part-time jobs growth in London is accelerating



Source: GLA Economics calculations based on ONS Workforce Jobs Series

- 2.2 Increased flexible working is generally seen as a positive development for the labour market. Reducing hours worked per person, during the recession, is thought to have enabled employee retention during lean times, reducing the risk of unemployment, as well as making efficiency savings for employers.

- 2.3 According to the Chartered Institute for Personnel and Development (CIPD), around one third of employees say flexible working helps reduce the amount of stress they are under, while 35 per cent report it improves their productivity. From the employer perspective, flexible working is linked to higher levels of employee engagement and well-being.¹⁷
- 2.4 Indeed, CBI research reveals 63 per cent of employers say flexible working practices have a positive effect on recruitment and retention.¹⁸ The UK Consumer Confidence Indicator found 58 per cent of Small and Medium sized Enterprises (SMEs) reported improvements in productivity after implementing flexible working practices.

Job satisfaction not guaranteed

- 2.5 A survey of zero-hours workers¹⁹ revealed that their overall job satisfaction levels were comparable with those of staff working on more traditional employment contracts.²⁰ However, there are indications that satisfaction is strongly influenced by the nature of the work and the level of pay involved. Depending on the type of flexibility, and for what reason it is being offered or requested, workers can have very different relationships with their employer.

Box 1: Types of Flexibility

Flexible employment contracts are used by businesses for three key reasons:

1. To respond to volatility of demand, for example during recession (minimum hours, zero hours, freelance, temporary workers)
2. To reduce costs and obligations such as pension contributions, holiday pay or parental leave (minimum hours, zero hours, self-employed workers)
3. To retain and recruit particular types of staff, for example carers (permanent part-time, job-share, compressed hours workers)

Flexibility is believed to have surged during the downturn for reasons one and two. Jobs were made casual rather than redundant, and flexibility contributed to the recovery, while ensuring fewer jobs were lost.

Post-recovery, we would expect to see a reduction in the number of people employed on casual contracts for cost reduction purposes. In hospitality, for example, where such contracts are widespread, demand should now be more predictable and use of permanent contracts increasingly viable. At the same time, as businesses expand, and look to recruit from a wider, skilled talent pool, we should see an expansion in flexibility for reason three.

However, indicators of reason three, such as the number of advertised job-share roles, are decreasing. Indicators of one and two, such as the proliferation of electronic shift scheduling systems are increasing.

Information provided by Ian Brinkley, The Work Foundation

- 2.6 Where the balance of power in an employment relationship is equally in favour of the employee and employer (as in scenario 3 in Box 1) employees are more likely to be satisfied with a flexible contract. The Timewise Foundation categorises such roles, which pay a salary greater than £20,000 (full time equivalent), and have flexibility that is compatible for employee and employer, as a ‘quality flexible job.’
- 2.7 Yet, while eight in ten people working part-time choose to do so,²¹ the majority of part-time roles in London are not ‘quality.’ Evidence suggests that flexible work is clustered in low-pay sectors:²² 48 per cent of part-time jobs paid less than the London Living Wage in 2015, compared with 13 per cent of full-time jobs.²³
- 2.8 According to the Timewise Foundation:

“If you put a cap at £20,000 as the equivalent of a quality wage (FTE), only three per cent of vacancies [above that level in London] are either part-time or open to flexibility. That is half the national average. [And] flexibility is concentrated at the bottom of the labour market in sectors where there is an existing need for flexibility because of customer service: retail, hospitality and social care.”

Increasingly Flexible, Increasingly Casual

- 2.9 The retail and hospitality sectors^f accounted for around 19 per cent of London’s workforce jobs²⁴ in June 2015. They are among the most prolific users of casual, part-time and temporary contracts, with over 55 per cent of retail employees in Britain working part-time in 2015.
- 2.10 Workers in these sectors are reported, by the unions which represent them, to be predominantly employed on contracts which guarantee only a minimum

Figure 3: Hospitality tops the sector tables for zero-hours’ contract use

	UK, not seasonally adjusted	
	In employment on a zero hours contract (thousands)	Per cent of people in employment on a zero hours contract
A-E Production including Agriculture	36	0.9
F Construction	29	1.3
G Wholesale and Retail	75	1.9
I Accommodation and Food	172	11.2
J-M Information, Finance, Professional	36	0.7
N Admin and support services	61	4.1
O Public admin	-	-
P Education	66	2.0
Q Health and Social work	148	3.6
R,S+H Transport, Arts, Other services	108	3.3
Total	744	2.4

Source: ONS Labour Force Survey

number of hours (frequently around 20 hours per week). ONS data suggests they are among the lowest paid of all jobs in London’s economy, with 53 per cent of retail and 68 per cent of hospitality workers paid less than the London Living Wage (see figure 5, page 23).²⁵ And the hospitality

^f Standard Industrial Classification (2007) sections G (Wholesale & retail trade) and I (Accommodation & food service activities)

sector is the most prolific user of zero-hours contracts (see figure 3). Few jobs in these sectors are eligible for the 'quality' flexibility label.

2.11 This particular brand of flexibility brings reduced security, benefits and pay.

Box 2: 'Tipping' the balance

- Hospitality workers, many earning the NMW on minimum hours contracts, are routinely required to sacrifice 50-100 per cent of customer tips (service charge) to their employer.
- Tip sacrifice is not limited to credit card payments – it often includes cash.
- Redistribution of tips lacks transparency and is open to abuse by managers who can use the system to discipline and reward staff.
- Workers find it difficult to monitor total service charge takings, and so cannot calculate what they are owed.
- Workers' share of the tips can be eroded to pay for customer walk-

Some commentators characterise the worker on a minimum- or zero-hours contract as a commodity or economic unit of the business. Hours are often allocated using electronic scheduling systems, and change from week to week according to the needs of the business (for example, demand for hotel rooms), with little or no warning.²⁶ This leads to high levels of insecurity over the hours worked, and so the pay received, in a given period. Workers are rarely consulted on their preferred hours or weekly availability. Instead they must adapt their home life with limited notice.

2.12 Additionally, we have heard that workers on contracts without guaranteed hours work in fear that their hours (and tips – see Box 2) will be reduced by managers as a means of discipline. Circumstances in which this might happen include workers speaking up on matters of workplace health and safety, workers seeking to uphold their benefits and rights, workers asking for time off for sickness or holiday, and workers not getting on well with managers.

2.13 Finally, workers on casual, flexible contracts are generally not classed as 'employees' and so don't qualify for employer-supplied benefits such as paid holiday, sick-pay or pension contributions.

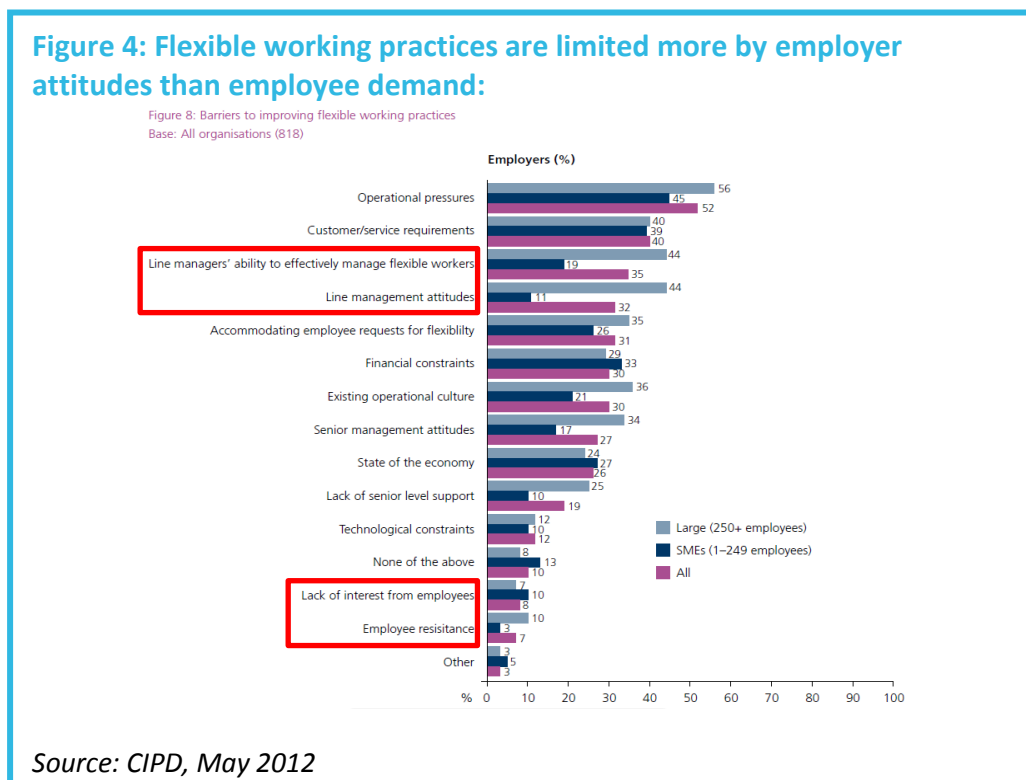
2.14 Casual flexible workers cite the insecurity of their hours as one of their greatest concerns. It removes their ability to plan financially, to access credit agreements, get rent or mortgage agreements, or, ultimately, to guarantee a wage which will cover their basic needs. This insecurity and lack of investment in employees, has an adverse impact on productivity, employee loyalty and retention, ultimately costing businesses money.

"I need an operation and cannot work for six weeks. I will receive only statutory sick-pay of £88.45 per week, or £383 per month. That is not enough to afford my rent and food"

Central London Kitchen

Make the job flexible, not the person

- 2.15 The flexible labour market is imbalanced. On one hand, there are flexible workers seeking to be employed on full-time contracts, either for additional hours, or because they are working full-time hours which are not reflected in stable contracts.
- 2.16 Some 21 per cent of part-time workers work part-time because they cannot find a full-time role (up from just 12 per cent in 2008)²⁷, yet we have heard that some work full-time hours, without having their contracts formalised, because it suits the employer better to keep them on casual contracts which do not require payment of benefits.
- 2.17 On the other hand, there are those working full-time, who struggle to find part-time opportunities appropriate for their circumstances and skill level. The Timewise Foundation, commenting on the under-utilisation of women's skills in the labour market, noted that there is no lack of demand for 'quality' flexible opportunities.
- 2.18 The reason these posts are not being created appears to have as much to do with management attitudes as operational constraints. CIPD found, in 2012, that the main obstacle to provision of flexible working opportunities, particularly in large organisations, was not demand from employees, but operational pressure and customer requirement, closely followed by the ability and willingness of management to accommodate flexible requests and manage flexible workers (figure 4).



- 2.19 In short, where the result is not of immediate benefit to business, employers have been slow to proactively design jobs on the basis of how, where and when people work and want to work.
- 2.20 This is unlikely to change until there is more available data on the nature of jobs available in the market. A requirement for employers to publish details of their hiring practices, and to include, as standard in job advertisements, information about whether roles are available on flexible terms, would increase accountability. This should encourage employers to work proactively and think creatively to increase flexible working opportunities.
- 2.21 Making such information available to job applicants would also make flexible opportunities more explicit, helping flexible workers to identify appropriate and high-quality roles, and so increasing the number of skilled applicants for each job. Timewise research shows that nine in ten hiring managers would offer flexibility at the point of hire if faced with the right candidate.²⁸
- 2.22 Additionally, legislation puts the control further into the hands of employers. Despite the right of every employee to request flexible working, there is no legal requirement upon employers to grant it, if they can cite a valid business reason.⁸
- 2.23 Few low-skilled workers are equipped to challenge such a decision or to negotiate a compromise. More systematic in-work training, to help workers understand their basic rights, and to teach communication and influencing skills would go some way to alleviating this issue. And it would help those already employed on flexible contracts, particularly with casual conditions, to uphold their rights and negotiate for better levels of remuneration.

⁸ Reasons listed on gov.uk for employers to use in rejecting requests, include the burden of additional costs, or an inability to meeting customer demand, reorganise work, or recruit new staff.
<https://www.gov.uk/flexible-working/after-the-application>

3. Restricted access

Key issues

Certain groups are more disadvantaged than others in London's labour market, facing higher levels of unemployment, and a lower chance of being paid the London Living Wage.

The proportion of employed parents of dependent children in employment in London has increased by almost 6 per cent since 2008.²⁹ However, the employment rate for women in London remains lower than in the rest of the UK and even lower for those working part-time or with dependent children.

The unemployment rate for those aged 18 to 24 in London remains considerably higher than the national average, at 17.2 per cent compared with 14.3 per cent for the whole UK. Nearly half of jobs in the 18 to 24 age group in London are paid less than the London Living Wage.³⁰

Gender imbalance

- 3.1 Research suggests that much of the UK's labour market growth in the past two decades has been driven by improvements in female participation and employment, with maternity policies, subsidised childcare services and tax incentives playing an instrumental role.³¹
- 3.2 However, the employment rate among women in London remains lower than in the rest of the UK and even lower for those working part-time. The gap is even starker when considering women with dependent children. In 2013, 60 per cent of women with dependent children in London were employed - nine percentage points lower than the rest of the UK.³² And the current employment rate for mothers and lone parents lags behind that of the whole population, at 62 percent compared with 71 per cent.
- 3.3 We have previously reported on how the capital's lower female employment rates are due to a combination of the higher costs of living, including childcare, commuting costs and time spent travelling to work.^h Average childcare costs have increased by 38 per cent in London since 2010, making it prohibitively expensive for low-paid workers. And, generally, childcare provision is not designed to serve those people whose working patterns are not standard, for example evening or weekend working, or hours which vary from week to week.³³
- 3.4 Lack of employer enthusiasm for redesigning jobs to allow part-time workers true, quality flexibility, plays a significant part in preventing growth in employment opportunities of this kind. Indeed, as the Timewise Foundation

^h See the Economy Committee's 2013 report, *Parental Employment in London*

has found, part-time job opportunities decline as salary increases. So not only do women find it hard to re-enter the market after having children but, once in a role which meets their work-life balance, they struggle to progress to another. According to the Timewise Foundation:

“77 per cent of people working part-time get stuck in their jobs”

- 3.5 At the upper end of the skill spectrum, this has implications for productivity. Many women returning to work have taken jobs below their skill level, wasting prior investment in their training. This creates a blockage in the market, preventing less skilled workers from progressing into the jobs in which those women are stuck, reducing their productivity in turn. Timewise Foundation research shows:

“Two thirds of women in the UK labour market currently underutilise their skills in the workplace, because they trade down in return for flexible part-time jobs.”

- 3.6 The Union of Shop, Distributive and Allied Workers (USDAW) told us that, in low-pay sectors such as retail and hospitality, women and carers are kept out of the higher paid managerial roles, not because of a skills mismatch, but because these are some of the only roles in retail which do not allow flexible hours – only eight per cent of retail managers work part-time. While women represent 68 per cent of the UK’s retail assistants, they make up just 39 per cent of managers, and five per cent of board members.³⁴
- 3.7 It is especially the case for low-paid workers that they may be ill-equipped to negotiate for progression on flexible terms. A Timewise project, in which they advocated on behalf of low-pay workers with caring responsibilities, supported over a third of the women involved into better-quality, flexible jobs, paying on average £5,000 per year more.

Generational challenge

- 3.8 The gap between rates of employment for youths and older workers is widening. As the older worker cohort nears full employment, young people without degrees are going the other way. Higher paying mid-skilled administrative jobs, and skilled trades, which would otherwise provide a platform for young people entering the labour market directly from school, are in decline. Research from the CBI and Pearson predicts that the percentage of such jobs will have reduced by 13 and nine per cent, respectively, from 2012 to 2022.³⁵
- 3.9 It is not, however, a problem of older workers blocking the labour market as some have suggested – job availability is not in question. Instead, we heard younger people are often not good substitutes for older people owing to a lack of basic workplace skills. In 2009, 40 per cent of businesses reported weaknesses among some employees in literacy and numeracy. This figure

now stands at 50 per cent. And 55 per cent of businesses report concerns about young people's lack of work experience. The problem is not limited to those without degrees. More than one in five businesses reported having provided remedial support for graduates in the past year, up from 15 per cent in 2014.³⁶

- 3.10 It is not only job opportunities which are poorer for women and the young. Pay, when employment is gained, is lower for women and those aged under 24, than for men. In 2015, 17 per cent of male employee jobs in London were paid less than the London Living Wage, while 24 per cent of female employee jobs in London and 49 per cent of employee jobs in the 18 to 24 age group in London were paid less than the living wage (see figure 5, page 24).³⁷

4. Making work pay

Key issues

Stagnating pay and the increasing cost of living, particularly for housing, childcare and transport since 2008, have made life in London increasingly unaffordable for some.

And the growing gap between pay and the cost of living has led to a higher proportion of people living in in-work poverty.

- 4.1 There are more households living in poverty in London than in any other region of the UK. London has 28 per cent of people living in a low-income household, compared with 21 per cent nationally. This is not limited to those households which are out of work: 57 per cent of Londoners in poverty are now in working families.³⁸
- 4.2 There are indications that this situation has worsened since 2008. Our 2014 report into low pay³⁹ found evidence to suggest that inequalities in earnings and incomes increased between 2006 and 2010. Those living on the lowest incomes were hit hardest, seeing their incomes, after housing costs, fall by 24 per cent in real terms compared with a four per cent fall nationally.⁴⁰

A Living Wage will help

- 4.3 Overall UK wage growth has been largely suppressed since the recession. This is believed to be for two key reasons:
 - Slack in the labour market, with more employees than jobs, or hours to fully employ them, and competition for jobs remaining high.
 - The concentration of employment growth in lower-skilled jobs, which tend to be less well paid,⁴¹ and high-skilled jobs, which are highly competitive.
- 4.4 After adjusting for inflation, median hourly pay for employees in London aged 18 and over, fell by ten per cent between 2008 and 2014. In comparison, the LLW (adjusted for inflation) rose by only three per cent over the same period.⁴²
- 4.5 For certain segments of London's labour market, particularly part-time workers, those aged 18 to 24, and those in retail or hospitality (which includes catering and cleaning), the percentage earning less than the LLW in 2015 is high (see figure 5).

Figure 5: The percentage of jobs earning less than the London Living Wage is growing.

	Employee jobs earning less than the London Living Wage (%)			
	2008 (<£7.20 per hour)	2014 (<£8.80 per hour)	2015 (<£9.15 per hour)	% Increase between 2008-2015
All	13	19	20	54
Full-Time	8	12	13	63
Part-time*	34	45	48	41
Retail Sector	44	55	53	20
Hospitality Sector	58	65	68	17
Female	15	22	24	60
Male	11	16	17	55
Age 18-24	37	48	49	32

Data from the ONS Annual Survey of Hours and Earnings (ASHE).
*The data measures earnings per job, not per person. Part-time workers may have more than one job

Source: London Assembly analysis of GLA Economics and ONS data.

- 4.6 As a result, both the number and proportion of jobs in London paying less than the LLW have risen since 2008. The proportion of London’s employee jobs earning less than the LLW increased by 54 per cent between 2008 and 2015. And not only has the increase been significant over the time period, but the rate of increase has not yet slowed.
- 4.7 Research by the Resolution Foundation⁴³ suggests that the rising proportion of employee jobs paid less than the LLW was due not to any increase in inequality in the wage distribution, but rather to general wage stagnation since the 2008 economic downturn.
- 4.8 The ONS Annual Survey of Hours and Earnings shows that, of the 872,000 jobs added to the labour market between April 2012 and April 2014, a staggeringly high proportion of the net gain (95 per cent) was in jobs paid less than the LLW (826,000).⁴⁴
- 4.9 Earning a living wage is not just likely to guarantee a decent standard of living, and reduce the need for workers to top up their wages with benefits, but it also increases the engagement and satisfaction of those workers in their jobs. As the Mayor’s Chief Economic Advisor told us:
- “All the evidence suggests productivity performance improves for those on living wages.”*
- 4.10 The LLW is particularly beneficial to those who are ineligible to claim many means-tested benefits, such as young people aged under 24.

4.11 700 of the capital's businesses are accredited LLW employers, which is higher than the Mayor's target of 250 businesses by the end of his second term.⁴⁵ However this is a tiny fraction of the 400,930 businesses registered in the capital, and less than half of the 1,835 businesses with greater than 250 employees.⁴⁶ In addition, the LLW has still not been universally adopted across the public sector.

Low pay the norm in the hospitality sector

4.12 Many hospitality workers earn the national minimum wage, and sometimes less, as a result of working additional hours for no additional pay. 68 per cent of the hospitality sector earns less than the LLW (see figure 5). As a result, many hotel workers have to claim additional money from government tax allowances and benefits, and so it could be argued that the taxpayer is subsidising the profits of the sector.

4.13 Yet calculations by the UNITE union reveal that current occupancy levels in London hotels are healthy, at 83-86 per cent, and they are charging some of the highest room rates in the world. It is unclear, therefore, how they are not sufficiently profitable to pay workers a Living Wage. The businesses benefit from the infrastructure and attractions which London has to offer, yet give little back to Londoners.

5. The role of the Mayoralty

Key issues

The Mayoralty has few direct levers over the labour market. However, the current Mayor made firm commitments, early in his term of office, to ensure all Londoners have access to fulfilling, sustainable employment, are able to progress and meet their career potential, and can contribute to a growing economy.

The current Mayor has fallen short of his aims. A new Mayor can succeed but must move beyond a focus on summative targets for job creation, instead driving quality in the jobs created.

To do so, they should apply both their influence as a leader, and their (and the London Enterprise Panel's) power in areas such as skills and innovation.

Further devolution would bring a number of opportunities for the Mayoralty to make the systemic improvements necessary to London's labour market. Agreements with central government should be in place before the current Mayor leaves office.

The legacy of the current Mayor

- 5.1 One of the five economic objectives set out in the Mayor's Economic Development Strategy is "To give all Londoners the opportunity to take part in London's economic success, access sustainable employment and progress in their careers."
- 5.2 Separately, he has stated that his economic priority is to ensure
"Londoners make the most of their innate talent and flair, so that they make London's economy even more productive and successful."
And to give
"Londoners the opportunity to find fulfilling jobs while ensuring the conditions are right for the businesses that employ them to flourish."⁴⁷
He pledged to create 200,000 jobs over the course of his second term, including 20,000 part-time jobs.⁴⁸
- 5.3 Our findings suggest that the current Mayor has fallen short of the mark in delivering these objectives: for more Londoners employment has become less sustainable and career progression increasingly elusive; many Londoners are unable to work to their potential, using neither their full talent nor flair; London's economy, while successful, is not as productive as pre-recession trends implied; and many of the available jobs, particularly in the low pay sectors, are far from fulfilling.

Why has the Mayor fallen short of his aims?

- 5.4 The Mayorality has few economic levers which can be employed to steer the development of London's labour market. Furthermore, the current Mayor, and his advisors have repeatedly prioritised the **number** of full-time jobs, part-time jobs, and apprenticeships created in the capital, and have neglected to stress the importance of the **quality** of those jobs. With regards to the LLW, the Mayor has also focused on increasing the number of companies paying the wage, rather than the number of people receiving it. As his Chief Economic Advisor told us:

"The data suggests that the employment picture in London has clearly improved. The latest figures...show that the employment rate is at 72.5% of all those of working age. That is the highest figure since records began in 1992. On that basis, it is a healthy jobs market."

- 5.5 Missing from this, and evident in our analysis of the current state of the labour market, is a **quality** metric, which ought to have been employed more routinely and rigorously by the current Mayor and his team.
- 5.6 For the next Mayor to avoid the issues highlighted in this report will require a renewed focus, beneath the headline figures, to ensure the jobs being created are better tailored to the needs of London's working population and employers.

What more should be done?

- 5.7 Despite a lack of statutory levers, we have seen the current and previous Mayors prove that they are willing and able to utilise a range of powers to benefit or promote a specific issue. For example, through his Apprenticeships Programme, the current Mayor was able to enhance marketing and promotions resources to highlight the business benefit to employers of recruiting apprentices. And, through the London Enterprise Panel (LEP), he was able to double the grant funding available to SMEs taking on an apprentice.
- 5.8 However, the Mayor has not always used the softer powers available to him for the advantage of the labour market. For example, the GLA has a stated commitment to fair employment and ethical sourcing as part of its procurement strategy. Yet, the Mayor has been reluctant to take the next step and make London Living Wage accreditation a requirement for businesses in receipt of capital funding from the GLA or TfL.
- 5.9 There are several such areas, this included, where the incoming Mayor, the LEP and key partners, could play a significant role in influencing the labour market, and reversing some of the negative trends we have identified.

Recommendation 1

The incoming Mayor, and the LEP, should help all Londoners to compete for better-quality jobs in the labour market, and to progress in their careers.

- The **next Mayor**, and **LEP**, should continue work to design high-quality, industry-tailored employment programmes and apprenticeships, in London's key growth sectors, thus providing the means by which low-skilled Londoners might access better job opportunities.
- The **LEP** should, as part of its work developing a careers advice service for young Londoners (London Ambitions), commission a review into the feasibility of creating a London-wide careers advancement service for low-paid Londoners. This should complement the Careers Advisory Service which will be delivered under Universal Credit.
- The **LEP** could promote, through a series of workshops, sector-wide initiatives on training in workplace skills, involving Further Education, private providers and unions.

Recommendation 2

The incoming Mayor should work with employers and trade unions, to improve job quality, and equalise the power balance between London's employees and employers.

- **The next Mayor** should establish a working group to look at the low-pay sectors most represented in London (retail and hospitality). This group should work closely with business leaders, and trade unions, on ways in which to encourage more organisations to improve contractual arrangements, and adopt fairer pay and conditions in line with their real needs and capability to pay.
- **The next Mayor**, in conjunction with **the Department for Work and Pensions**, could call for all job advertisements, including those in the lowest paid sectors, to include contract and pay details in order to improve transparency across sectors. In doing so, they should encourage more organisations to adopt fairer pay and conditions, and quality flexible hiring practices.
- **The next Mayor** should also work with the Government to introduce new rules requiring restaurants to display their tipping policies.

Recommendation 3

The incoming Mayor, and the LEP, should lead by example, and speak out publicly, to champion quality flexible working practices, and demonstrate their importance for both employers and employees.

- **The LEP** could engage in a programme of education for employers, particularly SMEs, to showcase flexible employment practices and the advantage of using them.
- **The Greater London Authority and its functional bodies** should advertise their flexible working policies more widely, and make it clear in job advertisements that all jobs are potentially open to those working flexible or part-time hours.
- **City Hall Group** should use its partnerships and procurement processes to extend this approach to flexible hiring. The Time Wise council programme showcases examples of best practice of this in London Local authorities.

Recommendation 4

The incoming Mayor, and the LEP, should seek ways to further the positive impact of the London Living Wage, and reduce the proportion of Londoners facing in-work poverty.

- **The next Mayor** must continue the existing call for the LLW to be adopted across London's labour market, with an ambition to extend this to all large multinationals, with comparable pay rates in other countries, over the next two years.
- **The next Mayor** should consider the viability of mandating the LLW for London businesses by 2020. To inform this, they could commission analysis to establish the likely impact of the LLW on job creation and loss in London, similar to national analysis produced in 2015 by the Office for Budget Responsibility.
- **The next Mayor** should seek a deal with the Government and the London Boroughs to expand the business rates discount offered to LLW accredited business in London Borough of Brent (and others) across Greater London.

Delivering a new devolution agreement will help

- 5.10 While the Mayor's initiatives on apprenticeships are welcomed, he has acknowledged that he will fail to achieve his 2012 manifesto commitment to deliver 250,000 apprenticeships starts by April 2016. The quality of apprenticeships being delivered in London is also poor, with 61 per cent of

London's apprenticeship starts being intermediate level courses, equivalent to 5 good GCSEs, over the course of the Mayor's second term.

- 5.11 This highlights the need for greater policy responsibility, and sufficient finance, to be devolved to City Hall so that a programme can be delivered that reflects the skills requirements of the city.
- 5.12 In future, with the promise of further devolution of both policy and fiscal responsibilities, there is considerable potential for the Mayoralty to have an enhanced influence and power over issues facing London's labour market.
- 5.13 Devolution of skills is critical. London's skills offer should be designed to overhaul all post-16 training, affording greater control to those alive to London's specific skills needs, namely the Mayor, GLA and borough alliances, in collaboration with local employers. The resulting system would deliver outcomes-driven provision, with skills tailored to the needs of London's employers, and updated in a timely fashion to keep pace with the changing needs of the economy. Provision would sit both with FE colleges and other appropriate entities with close industry links.
- 5.14 Furthermore, a local agreement relating to the apprenticeships levy should be sought under devolution, to enable London's employers to benefit from the funds to which they are contributing, while still receiving employees trained in skills required for their business needs.
- 5.15 Careers are a devolution priority, with devolution enabling a more coherent, London-appropriate offer, integrated fully within schools, colleges and the workplace. Apprenticeships and other vocational routes should be promoted, and personalised pathways, appropriate to each individual, identified. Adults and young people should also be able to access in-career advice and support, to ensure they are able to manage career progression and change throughout their working lives.
- 5.16 Tackling long-term unemployment among the hardest to reach groups must also be a priority for the greater powers resulting from devolution. A single budgetary pot for employment support in London would enable local commissioning of programmes and services which could be better tailored to the specific needs of the hardest to reach London citizens.⁴⁹ This would also provide quicker, easier access for those most in need of help, including those with poor mental and physical health, to find work and to progress.
- 5.17 Finally, devolution would enable further public investment in business support and innovation. In doing so, it would help the Mayor and the LEP boost growth in new and young sectors of the economy, such as technology, increasing the availability of quality, mid- and high-skilled jobs, and enhancing the ability of businesses to invest in their workers and their careers.

Recommendation 5

The **current Mayor** should, in response to this report, set out the progress he has made in securing the further devolution of powers and resources from central government, across the economics portfolio.

In order to secure an ambitious devolution package, which is in the best interests of London and London's employees, he should aim to have put agreements with central government in place before he leaves office.

Appendix 1 – Recommendations

Recommendation 1

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- The **next Mayor**, and **LEP**, should continue work to design high-quality, industry-tailored employment programmes and apprenticeships, in London's key growth sectors, thus providing the means by which low-skilled Londoners might access better job opportunities.
- The **LEP** should, as part of its work developing a careers advice service for young Londoners (London Ambitions), commission a review into the feasibility of creating a London-wide careers advancement service for low-paid Londoners. This should complement the careers advisory service which will be delivered under Universal Credit.
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- **The next Mayor**, in conjunction with **the Department for Work and Pensions**, could call for all job advertisements, including those in the lowest paid sectors, to include contract and pay details in order to improve transparency across sectors. In doing so, they should encourage more organisations to adopt fairer pay and conditions, and quality flexible hiring practices.
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Appendix 2 – Views and information

In order to assess the changes in London’s labour market since 2008, the Committee held two public hearings with contributions from a range of experts and stakeholders.

15 October 2015:

- Ian Brinkley, Chief Economic Advisor, Work Foundation
- Colin Stanbridge, CEO, London Chamber of Commerce and Industry
- Sue Terpilowski OBE, London Policy Chair, Federation of Small Businesses
- Andy Prendergast, Senior Organiser South East London and Kent, GMB

24 November 2015:

Session 1:

- Fiona Wilson, Head of Research and Economics, Union of Shop, Distributive and Allied Workers (USDAW)
- Emma Stewart, CEO, Timewise Foundation
- Kevin Curran, Vice Chair, Unite Hotel Workers Branch
- Hugh O’Shea, Chief Convener, Unite Hotel Workers Branch
- Mohinuddin Farooquim, Jesus Ucendo, Nilufer Erdem, Anna Goncalvez, Will Searby, Ewa Jasiewicz, Members, Unite Hotel Workers Branch

Session 2:

- Fiona Fletcher-Smith, Executive Director of Development, Enterprise and Environment, GLA
- Sir Edward Lister, Mayor’s Chief of Staff and Deputy Mayor, Policy and Planning, GLA
- Gerard Lyons, Chief Economic Advisor, GLA

We also received submissions directly from a range of organisations:

- Federation of Small Businesses
- Timewise Foundation
- USDAW

And we reviewed evidence published by governments, businesses, research institutes, campaigners and others. This included a report commissioned by the Committee and produced by GLA Economics:

London’s Changing Economy Since 2008, which can be accessed [here](#).

Appendix 3 – Endnotes

¹ Trust For London, *London's Poverty Profile 2015*, 2015

² ONS, *Regional Summary of Labour Market Headline Indicators (A07)*, December 2015

³ GLA Economics, *Current Issues Note 45, London's Changing Economy Since 2008*, 2015

⁴ Standard Occupational Category 2010 Major Group 1-3

http://www.nomisweb.co.uk/reports/lmp/gor/2013265927/subreports/gor_empocc_time_series/report.aspx?

⁵ Standard Occupational Category 2010 Major Group 4-5

http://www.nomisweb.co.uk/reports/lmp/gor/2013265927/subreports/gor_empocc_time_series/report.aspx?

⁶ ONS, *Regional labour market: Headline indicators for London (HI07)*, October 2015; ONS, *Regional labour market statistics*, October 2008

⁷ ONS, *Estimates of employee jobs paid less than the living wage in London and other parts of the UK*, 12 October 2015

⁸ ONS, *Employment rates broken down by region and year April to June, 1996 to 2015*, 10 November 2015

⁹ ONS, *Estimates of employee jobs paid less than the living wage in London and other parts of the UK*, 12 October 2015

¹⁰ GLA, *The Mayor's Economic Development Strategy*, 2010

¹¹ Bank of England *Inflation Report* May 2015

¹² Standard Occupational Category 2010 Major Group 4-5

http://www.nomisweb.co.uk/reports/lmp/gor/2013265927/subreports/gor_empocc_time_series/report.aspx?

¹³ As classified by the ONS Standard Occupation Classification (SOC) 2010

¹⁴ Standard Occupational Category 2010 Major Group 1-3

http://www.nomisweb.co.uk/reports/lmp/gor/2013265927/subreports/gor_empocc_time_series/report.aspx?

¹⁵ Mayor of London and London Councils, *The London Proposition*, September 2015

¹⁶ GLA Economics, *Current Issues Note 42 Part-time employment in London*, 2015

¹⁷ Chartered Institute of Personnel and Development, *Flexible working provision and uptake Survey Report*, May 2012

¹⁸ USDAW, *London Assembly Economy Committee written Submission*, November 2015

¹⁹ Chartered Institute of Personnel and Development, *Zero Hours Contracts: Myth and Reality*, November 2013

- ²⁰ Chartered Institute of Personnel and Development, *Zero hours contracts: Myth and reality*, November 2013
- ²¹ Timewise Foundation, *Written Evidence for London Assembly Economy Committee Enquiry into the flexible layout market in London*, December 2015
- ²² Timewise Foundation, *Written Evidence for London Assembly Economy Committee Enquiry into the flexible layout market in London*, December 2015
- ²³ ONS, *Estimates of employee jobs paid less than the living wage in London and other parts of the UK*, 12 October 2015
- ²⁴ ONS *Regional Summary of Labour Market Headline Indicators (A07) – Workforce Jobs by Industry*, December 2015
- ²⁵ ONS, *Estimates of employee jobs paid less than the living wage in London and other parts of the UK*, 12 October 2015
- ²⁶ USDAW, *London Assembly Economy Committee written submission*, November 2015
- ²⁷ ONS, *Regional labour market: Headline indicators for London (HI07), October 2015*; ONS, *Regional labour market statistics, October 2008*
- ²⁸ Timewise Foundation, *written evidence for London Assembly Economy Committee enquiry into the flexible labour market in London*, December 2015
- ²⁹ ONS *Employment rates broken down by region and year April to June, 1996 to 2015*, 10 November 2015
- ³⁰ ONS, *Estimates of employee jobs paid less than the living wage in London and other parts of the UK*, 12 October 2015
- ³¹ Resolution Foundation, *Completing the job: the pursuit of full employment*, July 2015
- ³² GLA Economics, *Current Issues Note 42 Part-time employment in London*, 2015
- ³³ USDAW, *London Assembly Economy Committee written Submission*, November 2015
- ³⁴ USDAW, *London Assembly Economy Committee written Submission*, November 2015
- ³⁵ CBI/Pearson, *Education and Skills Survey 2015: Inspiring Growth*, 2015
- ³⁶ CBI/Pearson, *Education and Skills Survey 2015: Inspiring Growth*, 2015
- ³⁷ ONS, *Estimates of employee jobs paid less than the living wage in London and other parts of the UK*, 12 October 2015
- ³⁸ LEP, *London 2036: An agenda for jobs and growth*, 2015
- ³⁹ London Assembly Economy Committee, *Fair Pay: Making the Living Wage the London Norm*, February 2014
- ⁴⁰ Lupton R et al, *Poverty, prosperity and inequality in London 2000/01-2010/11*, July 2013
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- ⁴² ONS, *Estimates of employee jobs paid less than the living wage in London and other parts of the UK*, 12 October 2015
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⁴⁴ ONS, *Estimates of employee jobs paid less than the living wage in London and other parts of the UK*, 12 October 2015

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⁴⁶ ONS, *Enterprise/local units by Employment size band and GB Local Authority Districts*, 2015

⁴⁷ <http://www.london.gov.uk/priorities/business-economy/vision-and-strategy>

⁴⁸ <https://www.london.gov.uk/sites/default/files/Part%20time%20Jobs%20final.pdf>

⁴⁹ London Assembly, 'A New Agreement for London': https://www.london.gov.uk/sites/default/files/a_new_agreement_for_london.pdf

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Chinese

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Vietnamese

Nếu ông (bà) muốn nội dung văn bản này được dịch sang tiếng Việt, xin vui lòng liên hệ với chúng tôi bằng điện thoại, thư hoặc thư điện tử theo địa chỉ ở trên.

Greek

Εάν επιθυμείτε περίληψη αυτού του κειμένου στην γλώσσα σας, παρακαλώ καλέστε τον αριθμό ή επικοινωνήστε μαζί μας στην ανωτέρω ταχυδρομική ή την ηλεκτρονική διεύθυνση.

Turkish

Bu belgenin kendi dilinize çevrilmiş bir özetini okumak isterseniz, lütfen yukarıdaki telefon numarasını arayın, veya posta ya da e-posta adresi aracılığıyla bizimle temasa geçin.

Punjabi

ਜੇ ਤੁਸੀਂ ਇਸ ਦਸਤਾਵੇਜ਼ ਦਾ ਸੰਖੇਪ ਆਪਣੀ ਭਾਸ਼ਾ ਵਿਚ ਲੈਣਾ ਚਾਹੋ, ਤਾਂ ਕਿਰਪਾ ਕਰਕੇ ਇਸ ਨੰਬਰ 'ਤੇ ਫੋਨ ਕਰੋ ਜਾਂ ਉਪਰ ਦਿੱਤੇ ਡਾਕ ਜਾਂ ਈਮੇਲ ਪਤੇ 'ਤੇ ਸਾਨੂੰ ਸੰਪਰਕ ਕਰੋ।

Hindi

यदि आपको इस दस्तावेज़ का सारांश अपनी भाषा में चाहिए तो उपर दिये हुए नंबर पर फोन करें या उपर दिये गये डाक पते या ई मेल पते पर हम से संपर्क करें।

Bengali

আপনি যদি এই দলিলের একটি সারাংশ নিজের ভাষায় পেতে চান, তাহলে দয়া করে ফোন করবেন অথবা উল্লিখিত ডাক ঠিকানায় বা ই-মেইল ঠিকানায় আমাদের সাথে যোগাযোগ করবেন।

Urdu

اگر آپ کو اس دستاویز کا خلاصہ اپنی زبان میں درکار ہو تو، براہ کرم نمبر پر فون کریں یا منکورہ بالا ڈاک کے پتے یا ای میل پتے پر ہم سے رابطہ کریں۔

Arabic

الحصول على ملخص لهذا المستند بلغتك،
فارجاء الاتصال برقم الهاتف أو الاتصال على
العنوان البريدي العادي أو عنوان البريد
الإلكتروني أعلاه.

Gujarati

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Greater London Authority

City Hall
The Queen's Walk
More London
London SE1 2AA

Enquiries 020 7983 4100
Minicom 020 7983 4458

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