

MAYOR OF LONDON



# An ECONOMIC RECOVERY FRAMEWORK for LONDON







# CONTENTS

Introduction	04
Jobs	14
Business	18
Thriving Neighbourhoods	22
Connected City	26
Global London	30

## INTRODUCTION

# LONDON is FACING its MOST CHALLENGING PERIOD in RECENT HISTORY.

The economic, social and health impacts of the Covid-19 pandemic cannot be overstated. We need to restore confidence in the city, provide targeted support to London's most vulnerable communities and rebuild the city's economy.





▲ Kings Cross

## The London Recovery Programme

The [London Recovery Programme](#) sets out five Key Outcomes, alongside guiding principles of addressing social, economic and health inequalities, delivering a cleaner, greener London, and ensuring Londoners are at the heart of recovery. It is addressing these challenges through [nine Recovery Missions](#), which are bringing together the public, private and voluntary sectors on focussed areas where partners can, working together, shift the dial.

The programme has also agreed an [Anchor Institutions Charter](#), through which some of the city's biggest organisations have committed to work together to help the capital recover from the pandemic.

## An Economic Recovery Framework for London

The Recovery Programme and its mission-based approach are central to our efforts to support London's Recovery, driving new and innovative collaboration on joint challenges. An Economic Recovery Framework can build on this by demonstrating how our recovery missions fit with a wider range of activities. By consolidating and agreeing this in a framework approach we will ensure that London Government achieves more than the sum of its parts, that our activities can be targeted towards addressing the structural inequalities that have resulted in disproportionate impacts on Londoners, and that we can mobilise at the pace and scale required to meaningfully tackle the climate and ecological crises.

There are roles that the GLA Group can play across London, those that can be best coordinated in sub-regional geographies, and those that London's boroughs are best placed to deliver. Partners in recovery also need to collaborate with Central Government, to work with a wider range of major institutions in all their forms on a wider range of policy areas, and to work constructively with local businesses to achieve a true 'full system response' that the current crisis demands.



## The challenges facing London

London benefits from great economic strengths – it is a leading global city, a hotbed of entrepreneurship and innovation, a place that attracts high levels of investment and talent and a premier destination for its creative and cultural assets and its diverse and open community.

But the role of major urban centres has changed through the pandemic. The digital transition, changes to remote work and more flexible commuter patterns, which were underway before the pandemic, have been accelerated. New trends in the ways we live, shop and work are likely to remain in the future, changing the geography of demand for homes, workplaces, goods and services.

Cities that thrive under these new conditions will need to position themselves as places that people want to be – by virtue of their roles as engines of collaboration and innovation, the draw of their public realm, their hospitality & leisure offers, their leading cultural & creative status, and the quality of their public services. Activities that improve quality of life for Londoners should be prioritised, which will in turn support economic growth.

London was facing particular challenges before the pandemic. Despite decades of growth, productivity growth was slowing, spatial inequalities were worsening, population growth was levelling off, and shifts in consumer behaviour were causing decline in high street spending. These challenges have been exacerbated, presenting a particular challenge for the city.

## Addressing disproportionate impacts

London has been heavily impacted by the pandemic, and the way that these impacts have accrued within London have also hit particular groups hardest. The pandemic exposed and exacerbated structural inequalities, which has led to disproportionate impacts. Young Londoners, people with no or low qualifications, black and minority ethnic Londoners and older people have all experienced particular challenges in the labour market. There are clear links between outcomes in health and work, with disabled people and those with health conditions, as well as women experiencing comparatively low levels of economic activity. It is vital that all of our recovery activities are targeted at narrowing social, economic and health inequalities.





London is a world leader for climate action. Its growing Green sector is worth £48bn in sales and employs nearly 314,000 people, making it worth more than the construction and manufacturing sectors combined.



## Tackling the climate and ecological emergency

London is facing the dangers of the climate and ecological emergency and suffers from critical levels of air pollution. The pandemic has highlighted how the environment can have a disproportionate impact on Londoners, with those living in the most deprived areas most likely to experience poor air quality, cold, damp homes and limited access to green space. But London is also a world leader for climate action. Its growing Green sector is worth £48bn in sales and employs nearly 314,000 people, making it worth more than the construction and manufacturing sectors combined. Putting the environment at the centre of our recovery is therefore a chance to reverse the looming economic downturn, bringing new investment, driving business growth and providing decent, skilled local jobs – while addressing the need to rapidly decarbonise and tackle harmful air pollution.







# The EFFECTS of the PANDEMIC on LONDON

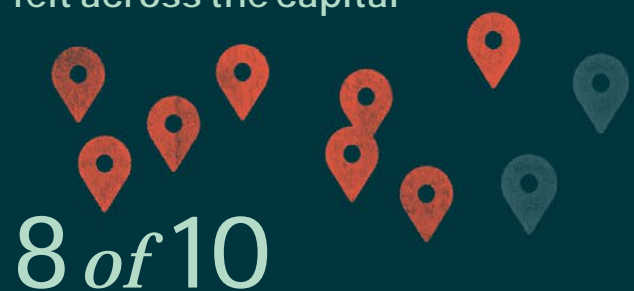
London's labour market has been hit hard by the pandemic



There were around 4.02 million payrolled employees living in London in July 2021. The decline since February 2020 of 124,300 payrolled employees accounts for nearly 62% of the total UK (net) loss of 201,300 since the start of the pandemic.

Source: HM Revenue and Customs – Pay As You Earn Real Time Information

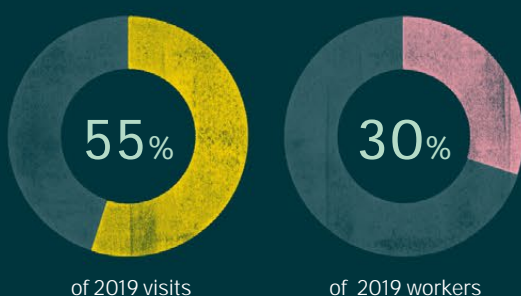
disproportionate impacts felt across the capital



By the end of July 2021, eight of the ten local authorities with the highest furlough take-up rates were in London. This was led by Newham and Hounslow (both with 10% of eligible jobs on furlough) and other boroughs in the north and west of the capital.

Source: HMRC Coronavirus Job Retention Scheme statistics

Challenges in the CAZ, resulting in impacts on jobs across London



Day time visits to the Central Activities Zone (CAZ) in July 2021 are 55% of 2019 levels and the number of workers in the CAZ are approximately 30% of 2019 levels.

Source: Anonymised and Aggregated data from O2

Changing commuting patterns have reinforced neighbourhoods



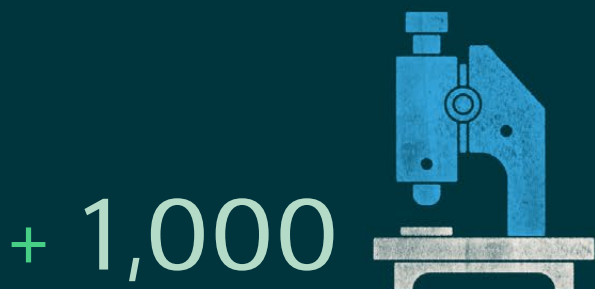
Spend in smaller, local centres has recovered much better (80% have recovered to near 2019 levels) compared to larger major centres, areas that rely on workers and central London and fringe areas (only 50% have recovered).

Source: Anonymised and Aggregated data from Mastercard



London has been hit worst but there are now spaces for opportunity. If London thrives so does the rest of the UK.

There are growth sectors that can help boost London's recovery



Over 1,000 innovative companies in Life Sciences with industry spanning everything from advanced therapies to digital technologies and AI.

Source: [www.medcityhq.com/medcity-map/](http://www.medcityhq.com/medcity-map/)

London's recovery is critical for the UK as a whole



24p of each £

24p of production generated elsewhere in the UK for each £ consumed in London.

Source: GLA Economics, London's Input Output Tables, The London input-output tables | London City Hall

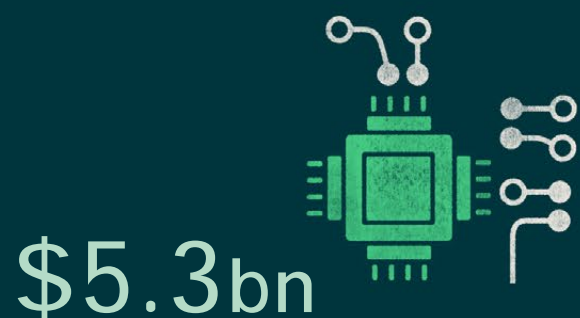
Investment in modern utilities and energy efficiency can reduce carbon and support jobs



Making London zero carbon will require a minimum of £61 billion investment needed from private and public sources to upgrade infrastructure. Catalysing the scale of retrofit required by 2030, requires £10 billion of building fabric energy efficiency measures and could support over 140,000 jobs.

Source: [www.london.gov.uk/what-we-do/environment/climate-change/climate-action-plan](http://www.london.gov.uk/what-we-do/environment/climate-change/climate-action-plan)

Significant opportunities if London can retain its global position



In 2021, London attracted \$5.3bn of venture capital investment into fintech companies, the second largest in the World and 2.5 times more than any other European city.

Source: [media.londonandpartners.com/news/record-six-months-for-vc-investment-into-london-and-global-fintech-sector](https://media.londonandpartners.com/news/record-six-months-for-vc-investment-into-london-and-global-fintech-sector)



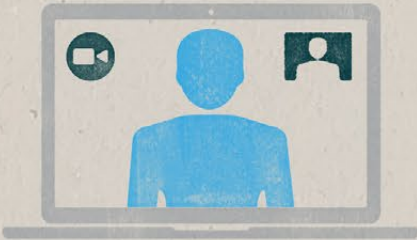
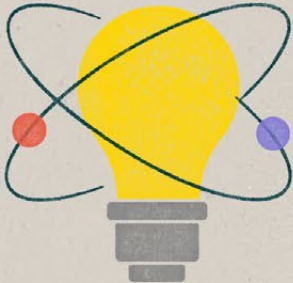



# The FIVE PILLARS of the RECOVERY FRAMEWORK

ACHIEVING NET ZERO;  
GREEN ECONOMY ACTIONS



(These themes cut across all pillars)

NARROWING INEQUALITIES

Jobs	Business	Thriving Neighbourhoods	Connected City	Global London
				
Employability and barriers to employment	Growth sectors	High Streets for All	Transport	Long-term role of the Central Activities Zone (CAZ)
Access to services (No wrong door)	Business support	Public Realm	Digital	Visitor economy
Skills and careers	Innovation and productivity	Quality affordable housing	Modern utilities	Culture, entertainment and events
Good work	Entrepreneurship	New neighbourhoods	Gateways and interchanges	Promotion and investment



# JOBS

London's labour market has been the worst hit by the pandemic among the UK regions. Pre-pandemic, the city had been narrowing the gap in its unemployment rate relative to the UK average, but this gap has now widened. London's unemployment rate is the highest among the UK regions (6.4 percent for the three months ending June 2021 compared to 4.7 percent nationally), with young Londoners among the hardest hit and at significant risk of economic scarring. Over a million Londoners are claiming Universal Credit (July 2021) and 297,000 Londoners were still on furlough at the end of July 2021 – the highest take-up rate among UK regions. London was also home to eight of the ten local authorities with the highest proportions of jobs on furlough.

The pandemic has laid bare the structural inequalities in London's labour market that existed pre-pandemic. Young Londoners, people with no or low qualifications, black and minority ethnic Londoners and older people aged 50 plus have all experienced greater levels of unemployment during the pandemic compared to other groups. Those in insecure jobs have been at a higher risk of exposure to Covid-19, in a vicious cycle which further exacerbates

the precariousness of their work. Disabled people, those with health conditions and women experience low levels of economic activity. In work poverty was rising in London before the pandemic and this trend has been accelerated. Apprenticeship numbers in London continue to lag behind the rest of the country.

## Employability and barriers to employment

The support needed for different Londoners to access a job will vary. It can be relatively light touch – a young person who needs work experience or a Londoner out of work for the first time in 20 years who needs support around digital skills and navigating the jobs market. Many Londoners have more substantial barriers to getting and retaining a job including health problems, insecure and/or high cost housing, access to childcare or drug/alcohol addiction. The changing nature of work presents further barriers to employment for those that do not have appropriate home environments in which to work remotely. London's employment and skills services need to be flexible to respond to diverse needs and be integrated with other local services to effectively deal with the more substantial barriers. Delegated programmes such as the Work and Health Programme and current European Social Fund (ESF) programmes are important to achieving this but are due to end in the next few years.

## Access to services (No wrong door)

Employment and skills services in London are fragmented and difficult for both Londoners and employers to easily find the help they need. There is a need to knit together national services and programmes, such as Jobcentre Plus and the 'Plan for Jobs', with regional and local activities. London government will develop a 'No Wrong Door' (NWD) approach to employment and skills services, taking a person-centred approach. This will require better collaboration between providers and commissioners and more data sharing.

## Skills and careers

It is likely that high skilled jobs will lead the recovery in London. But too many Londoners are stuck in low paid jobs and need support to progress onto better paid employment. Many Londoners may need to work in different sectors. Access to quality careers advice and skills support will be crucial to achieve success. London will focus skills support on key growth sectors: digital, green, creative, hospitality and health and social care, working closely with employers. It will consider how the delegated £318m annual Adult Education Budget (AEB) can support the recovery and how to promote self-employment and enterprise as options.

## Good work

Good work for Londoners is work that is fair, decent and secure in terms of pay, benefits and work conditions and gives opportunities for skills development and career progression. London government is committed to supporting Londoners into good work and encouraging employers to provide it. We will use all our levers to generate good jobs in London and widen access to these.

**"London will focus skills support on key growth sectors: digital, green, creative, hospitality and health and social care, working closely with employers."**





## Our ROLES in RECOVERY

GLA Group:	Sub-regions:	Boroughs:
<ul style="list-style-type: none"> <li>• With London Councils, identify major gaps in employment and skills provision prior to furlough ending &amp; levers to expand Good Work.</li> <li>• Re-focus the £318m Adult Education Budget (AEB) to support recovery.</li> <li>• Fund and support skills academies, careers and enterprise hubs and integration hubs to achieve the aims of the No Wrong Door (NWD) approach.</li> </ul>	<ul style="list-style-type: none"> <li>• Manage key delegated employment schemes such as the Work and Health Programme and Job Entry Targeted Support and integrate these with local services.</li> <li>• Deliver on the NWD approach, developing integration hubs to join up provision working with Jobcentre Plus (JCP), providers, employer and anchor institutions.</li> <li>• Deliver links between sub-regional job creation opportunities and employment and skills services, developing clear progression pathways.</li> <li>• Work with NHS partners to ensure effective routes into the health and social care workforce.</li> </ul>	<ul style="list-style-type: none"> <li>• Deliver local employment and skills services to respond to the specific needs of local communities, including those sectors that rely on inbound travel.</li> <li>• Promote the NWD approach locally, working with Sub-regional partnerships (SRP) &amp; exploring co-location with JCP.</li> <li>• Use their levers as service commissioners, service providers, grant givers and employers to create more Good Work job opportunities; as well as more Kickstart placements &amp; apprenticeships for young people.</li> </ul>
<p>GLA, SRPs and boroughs will develop a common granular understanding of London's labour market and skills needs across the city and work with Government to implement the Skills and post-16 Education Bill; run a skills and employment awareness campaign for Londoners and explore the use of an overarching common branding for employment and skills services, with local flexibility.</p>		

## OPPORTUNITIES for COLLABORATION

Central Government	Major Institutions	Business
<p>Agree a jobs and skills deal with London that includes:</p> <ul style="list-style-type: none"> <li>• enhanced employment, skills and careers support for key communities and groups.</li> <li>• an allocation of UK Shared Prosperity Fund that matches the scale of London's challenge and is fully devolved.</li> <li>• supports the delivery of the NWD approach including a step change in data sharing and reform of the apprenticeship levy.</li> </ul>	<ul style="list-style-type: none"> <li>• Create opportunities for Good Work for local communities through local employment, and to increase workforce diversity.</li> <li>• Support disadvantaged local communities to access enterprise and self-employment opportunities.</li> <li>• Generate significantly more apprenticeships, Kickstart placements and opportunities for young people to experience work.</li> <li>• Establish effective pathways into the health and social care workforce.</li> </ul>	<ul style="list-style-type: none"> <li>• Significantly increase investment in skills training of their workforce over the next five years.</li> <li>• Co-design and participate in employment and skills provision, so that it leads to more job opportunities.</li> <li>• Adopt or work towards the Mayor's Good Work Standard or equivalent.</li> </ul>

## CONTRIBUTING to a GREEN and FAIR RECOVERY

Achieving environmental sustainability and growing the green economy	Narrowing social, economic and health inequalities
<p>Develop a green skills academy; research to better understand green skills and demand; integrate green skills and employment across other skill areas or areas of job growth, e.g. construction, retrofit, digital.</p>	<p>Address diversity and inclusion issues for key growth sectors; deliver integrated services to improve outcomes for the most disadvantaged groups; take a targeted approach on groups most affected by the pandemic.</p>



# BUSINESS

**London is comprised of a diverse range of businesses from some of the UK's most innovative and highly specialised companies to firms carrying out the core activities that make our city work, employing millions of Londoners. London firms account for around a fifth of all UK businesses and 29 percent of business turnover.**

But the pandemic has had a significant impact. Thousands of businesses and jobs are at risk, particularly in sectors that rely heavily on face-to-face interaction or international travel. Supporting our businesses – particularly small firms that make up 99% of the total – to adapt to the economy of the future is now more important than ever. We will promote a strong innovation-led recovery in which London's businesses – small and large, in both knowledge-intensive and foundational sectors – can turn this crisis into an opportunity to become more resilient, increase productivity and support Good Growth.

## Growth sectors

London has a global competitive advantage in some key sectors which are particularly important to drive the UK's future growth and productivity. These include Culture & Creative Industries, Financial & Business Services, Life Sciences, Low Carbon

& Environmental Goods & Services and Tech & Digital. London's world-leading green finance sector will also play a key role in supporting growth and achieving sustainability.

In order to succeed firms will be looking for new market opportunities (across the public sector and globally), collaborative partners, the right space/infrastructure (including physical clusters of growth along innovation corridors), data, risk capital and skills. London government can support and facilitate access to these vital elements to enhance the growth of firms in these critical sectors.

## Business support

The majority of London's businesses and most jobs are within sectors that provide day-to-day goods and services. These businesses are crucial to maintaining city competitiveness and ensuring London remains a well-functioning and liveable city.

Support is urgently needed for those businesses and sectors which have been hardest hit by the pandemic, often because they rely heavily on face-to-face interaction. This includes activities such as retail and hospitality. Some firms will bounce back on their own, while others will benefit from support to build resilience, continue to provide employment and help make London an attractive place to live, work and do business.

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## Innovation & productivity

Innovation is key to supporting productivity gains across all sectors, not just the newer, faster growing sectors of the economy. In the long term, improvements in productivity can enable increases in living standards and therefore are a necessary, although not sufficient, condition for Good Growth.

We will support the adoption of existing technologies, improve business management and leadership practices, invest in skills, support greater investment in R&D and foster collaboration. Continuing to invest in innovation districts, such as the Knowledge Quarter or White City, will be key for London to turn this crisis into an opportunity to harness its global strengths in science, technology and innovation.

## Entrepreneurship

New businesses and start-ups are especially important in job creation in London. As smaller firms they face particular challenges as a result of the pandemic from quickly having to adapt to digital work and liquidity problems. To support a strong recovery, we must provide a more targeted and integrated offer to those who want to start or grow a business in London and maintain the vibrancy and dynamism of London's economy, including to business owners and the self-employed who face particular challenges and have had less access to Government support.





Our ROLES in RECOVERY

GLA Group:	Sub-regions:	Boroughs:
<ul style="list-style-type: none"><li>• Support the physical development of growth clusters and innovation clusters, through access to land, strategic planning and infrastructure.</li><li>• Support small businesses to adopt productivity enhancing technologies and working practices.</li><li>• Provide grants and wider support to accelerate innovation and collaboration.</li><li>• Review business support provision to maximise its impact across different sectors and places.</li></ul>	<ul style="list-style-type: none"><li>• Strategic support to enable cluster growth, attract investment and skills, support collaboration across administrative boundaries.</li><li>• Explore entrepreneurship start up schemes in boroughs with substantial job losses.</li><li>• Support the scaling up of successfully piloted innovation across boroughs.</li></ul>	<ul style="list-style-type: none"><li>• Support firms’ resilience through local business support programmes targeted at local challenges and opportunities.</li><li>• Support business growth through land availability, local planning and infrastructure.</li><li>• Provide pilot sites for innovators and a affordable workspace for start-ups and scale-ups.</li></ul>



## OPPORTUNITIES for COLLABORATION

Central Government	Major Institutions	Business
<ul style="list-style-type: none"> <li>• Collaborate on emerging best practice, white labelling innovative policies piloted by the GLA (such as the Technology Adoption Service) for other cities to roll out.</li> <li>• Provide London with business support funding which can be adequately targeted towards local need.</li> </ul>	<ul style="list-style-type: none"> <li>• Work with the GLA, boroughs and SRPs to align, coordinate and scale up innovation support.</li> <li>• Invest in innovation infrastructure, translational capacity and skills.</li> <li>• Collaborate with business on R&amp;D, procurement support and networking opportunities.</li> <li>• Ringfence supply chain opportunities for SMEs.</li> <li>• Champion inclusive innovation and diversity.</li> </ul>	<ul style="list-style-type: none"> <li>• Offer collaboration, procurement and other valuable opportunities to small businesses.</li> <li>• Ensure the design of new innovations are inclusive and meet user need.</li> <li>• Commit to increasing investment in R&amp;D.</li> <li>• Enable access to patient capital and risk capital, increase access to capital for black entrepreneurs, increase investment in skills for underrepresented groups.</li> </ul>

## CONTRIBUTING to a GREEN and FAIR RECOVERY

Achieving environmental sustainability and growing the green economy	Narrowing social, economic and health inequalities
<ul style="list-style-type: none"> <li>• Accelerate and scale up innovative solutions.</li> <li>• Encourage and support the growth of low carbon businesses, and of London's world-leading green finance sector.</li> <li>• Support SMEs to move to a net zero business model.</li> </ul>	<ul style="list-style-type: none"> <li>• Showcase innovative solutions to enable a fair and just transition for small businesses.</li> <li>• Contribute to improve the representation of women and black, Asian and minority ethnic people at senior levels in growth sectors' firms.</li> <li>• Business support interventions to target those facing particular barriers to starting and running a business, in particular black, Asian and minority ethnic, women and disabled entrepreneurs and business owners.</li> </ul>



# THRIVING NEIGHBOURHOODS

**London's diverse and thriving local neighbourhoods are one of the city's greatest strengths. For many people, the vitality of their immediate neighbourhood is a litmus test for London's economic strength and quality of life. Beyond their importance for those that live in and around them, dynamic high streets, markets and public spaces are also central to a city's global appeal.**

Even before Covid-19 many neighbourhoods faced challenges. Growth in online retail was reducing footfall and spend in town centres and the pandemic has accelerated this trend. Many Londoners struggle to afford an acceptable place to live, with median monthly rent at £1,425 and homeownership below the national average and falling.

But there are also opportunities to be grasped. More home working, while challenging for central London, may help revitalise high streets across London. New developments will provide homes, jobs and training. And since lockdown the importance of high-quality public realm and green space has never been more clearly recognised.

## **High streets for all**

London's high streets need to adapt to changing expectation and shifting demands for retail and commercial space to remain vibrant. Strong partnerships between communities, businesses and councils will be needed to develop new plans for the city's high streets.

Creative uses for vacant property will be critical, such as flexible workspace, cultural facilities or community infrastructure. Another priority will be to maintain flexibility around licensing and regulation to allow experimental and temporary uses, and to support welcoming and successful 24-hour economies across the capital.

## **Public realm**

London is the world's greenest major city, with residents and visitors benefiting from its parks and open spaces, squares and tree-lined streets. Lockdown showed Londoners' reliance on these spaces for exercise and escape like never before, but also laid bare the disparities in access between communities.

The capital's recovery from the pandemic should create a legacy of better public realm, especially in those areas with the greatest need. This could mean the creation of new and improved green spaces, measures to support walking and cycling, facilities for children and families, and new public areas. Improving air quality will also remain a priority.

### Quality affordable housing

Despite a significant increase in recent years, there is still more to do to ensure London has the homes it needs. An acceleration in home building from councils, housing associations and private developers, and across all price points and tenures, is needed to sustain the city's diverse labour market and support jobs. New homes will need to be built to the

highest environmental standards, and substantial investment in retrofit will be needed to reduce the carbon emissions of the capital's existing housing stock.

### New neighbourhoods

The central role of new neighbourhoods and districts in supporting growth is widely recognised. Major projects such as Barking Riverside, Meridian Water, Brent Cross, Thamesmead and Old Oak and Park Royal will provide homes, high-quality public realm and space for business, retail, leisure and culture.

They also have a broader role in the capital's economic recovery – acting as a sign of renewed ambition, attracting investment, and providing significant employment and training opportunities for Londoners of all backgrounds.





## Our ROLES in RECOVERY

GLA Group:	Sub-regions:	Boroughs:
<ul style="list-style-type: none"> <li>• Continue to fund a affordable housing delivery and work with partners on the delivery of new neighbourhoods.</li> <li>• Support innovation, including through High Streets Challenge Fund, Creative Enterprise Zones and the 24-Hour London programme.</li> <li>• Working with boroughs and business groups, develop a Property Pledge and seek planning reforms that provide the flexibility needed post-lockdown, e.g. on permitted development.</li> <li>• Deliver programmes to address inequalities in environmental outcomes revealed by the pandemic, by tackling air pollution and improving green space.</li> <li>• Develop and deliver an ambitious programme of commercial and residential developments on TfL land.</li> </ul>	<ul style="list-style-type: none"> <li>• Develop and promote opportunities for cross-borough projects and research.</li> <li>• Facilitate the sharing of best practice across boroughs and with other sub-regional partners such as Business Improvement Districts (BIDs) etc.</li> </ul>	<ul style="list-style-type: none"> <li>• Enable strategic use of council and wider public sector assets for new high street activities, including workspace and interim use to accommodate changing business need.</li> <li>• Engage communities, business and landlords in developing new high streets and night-time strategies.</li> <li>• Support developers to accelerate their housing programmes and expand the direct delivery of a affordable homes, and coordinate use of wider public sector land.</li> <li>• Lead the delivery of thriving new neighbourhoods and districts, and work in collaboration with BIDs and local businesses to create a distinctive and welcoming local offer.</li> <li>• Plan localised pedestrianisation, active travel and green space creation.</li> </ul>
<p>Set up and run an innovative data partnership to collect, disseminate and analyse high frequency data about neighbourhood vitality so that restart investment can be informed and targeted.</p>		

## OPPORTUNITIES for COLLABORATION

Central Government	Major Institutions	Business
<ul style="list-style-type: none"> <li>• Support the delivery of major new districts and neighbourhoods, including through Homes England, infrastructure investment, and funding streams such as Home Building Fund (HBF).</li> <li>• Collaborate on planning and taxation reform proposals (including Business Rates reform) that support thriving high streets and quality housing in London.</li> </ul>	<ul style="list-style-type: none"> <li>• Open up and develop estates to provide high-quality, accessible public realm.</li> <li>• Deploy surplus land and property to support new affordable housing.</li> <li>• Collaborate and innovate with the community to develop new high street uses and support town centre employment.</li> <li>• Seek opportunities to locate in new neighbourhoods and support jobs and growth.</li> </ul>	<ul style="list-style-type: none"> <li>• Work directly and through BIDs to develop and implement new high streets strategies.</li> <li>• Provide flexibility to sustain existing tenants or to support new uses.</li> <li>• Work with councils and others to animate town centres and public spaces.</li> <li>• Provide employment and growth opportunities through new development projects.</li> </ul>

## CONTRIBUTING to a GREEN and FAIR RECOVERY

Achieving environmental sustainability and growing the green economy	Narrowing social, economic and health inequalities
<p>Deliver a better public realm with more green space and active travel to improve resilience to climate change and reduce emissions.</p> <p>Build new housing and neighbourhoods to higher environmental standards, and improve the energy efficiency of London's existing housing stock.</p>	<ul style="list-style-type: none"> <li>• Improve access to quality green space to address long-standing disparities between communities.</li> <li>• Accelerate home building in order to make better homes more affordable for all those who need them.</li> <li>• Design new neighbourhoods and public spaces with the needs of all communities in mind.</li> </ul>



# CONNECTED CITY

**London's success depends on Londoners being connected to friends and family, work and leisure opportunities, and the rest of the UK and the world.**

Transport infrastructure and services are essential to maintain the city's attractiveness as a place to live, visit and work, moving people and goods into and around the city. Good quality, modern digital infrastructure will support the productivity of our businesses and enable people to stay connected, as well as reducing our impact on the environment.

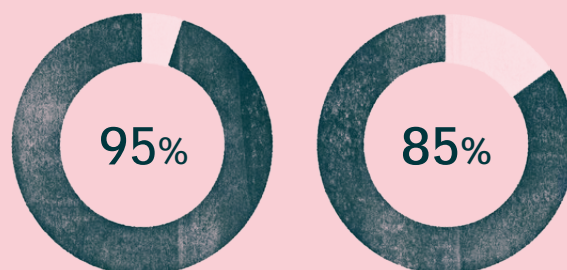
## Transport

The pandemic has created unprecedented challenges for London's transport network. During lockdown, tube and bus journeys fell by 95% and 85% respectively. And as lockdown has eased, road traffic has bounced back more quickly than public transport demand, risking a reversal to the recent trend away from car use. Many parts of the capital suffer from poor public transport connections, which impacts on residents' access to jobs, education and training. London needs to continue to promote active travel, deliver road safety schemes and encourage a return to public transport.



The high fixed costs of running London's public transport network mean that a proper long-term approach to funding TfL is needed if the city is to adapt to new patterns of work and leisure travel.

Partners must also work together to source investment in new strategic transport links that have the potential to unlock new housing and stimulate economic growth.



**During lockdown, tube and bus journeys fell by 95% and 85% respectively. And as lockdown has eased, road traffic has bounced back more quickly than public transport demand, risking a reversal to the recent trend away from car use.**



## Digital

Use of digital technologies has been increasing for many years. Home working, home schooling and the limited ability to visit shops during the pandemic have accelerated this trend. They have also highlighted significant inequalities in access to technology, meaning that lockdown has had a much bigger impact on the poorest in our society.

The pandemic has also brought into focus the importance of digital and smart infrastructure. In London we have proven that investing in this infrastructure can have a real impact by creating business opportunities and jobs and reducing carbon emissions.

It is vital that we have the right connectivity backbone in place, that we support the market to develop solutions and technologies that can contribute to London's wider recovery, and that we continue to invest in digital skills and making technologies widely available to Londoners.

## Gateways and interchanges

London's major transport gateways – rail stations and airports – are among London's most significant opportunities to create jobs and new neighbourhoods. Investing in these opportunities will be crucial to ensuring London's continued long-term economic success.

As we recover from the pandemic, we must pay particular attention to the communities around airports, which have been very hard hit. The loss of airport-related and supply chain jobs in those communities means they will need focused support to recover.

## Modern utilities and energy efficiency

London's wider utility infrastructure has not been heavily impacted by the pandemic, but tackling the long-standing need to upgrade water, sewage, heating, and electricity systems offers a significant opportunity to improve efficiency, deliver more sustainable networks, create jobs and support a green economic recovery.

Tackling carbon emissions from London's energy sector and other utilities is vital. This requires significant and sustained investment in increasing the use of energy from green sources, including through the use of London's purchasing power, and in driving up the efficiency of homes and commercial buildings across London. An accelerated and ambitious pan-London retrofit programme, combined with to drive up skills and develop new businesses in this area, would present a huge opportunity to deliver economic benefits while also addressing fuel poverty.



## Our ROLES in RECOVERY

GLA Group:	Sub-regions:	Boroughs:
<ul style="list-style-type: none"> <li>• Manage the public transport network and restore public confidence in its safety.</li> <li>• Invest in schemes to encourage active travel.</li> <li>• Distribute funding and work with delivery partners on major digital infrastructure programmes, such as TfL's Connected London; support operators and boroughs in filling gaps in broadband coverage.</li> <li>• Monitor and support utility planned investment and jobs creation; deliver the Infrastructure Coordination Service.</li> <li>• Support utility companies with skills and employment programmes which target employment towards under-represented groups.</li> </ul>	<ul style="list-style-type: none"> <li>• Co-ordinate work to help digital providers roll out modern broadband and 5G infrastructure.</li> <li>• Facilitate the development of strategies for improved infrastructure planning at the sub-regional level.</li> <li>• Co-ordinate engagement with government and industry on support for aviation communities.</li> </ul>	<ul style="list-style-type: none"> <li>• Co-ordinate and focus support for aviation communities.</li> <li>• Deliver local transport schemes.</li> <li>• Support green initiatives such as decentralised energy networks and utility works.</li> <li>• Use the planning system to lever investment into transport and digital infrastructure and utilities.</li> </ul>
<p>Develop subregion and borough strategies into a pan-London infrastructure framework, aligned with TfL and GLA investment and development planning and drawing upon the GLA's data tools and infrastructure coordination work, to set out a pipeline of investments to support London's economic success, accelerate delivery, minimise disruption, and seek public and private funding where appropriate.</p> <p>Coordinate and convene to share expertise, create mechanisms for collaboration, seek opportunities of scale, and drive an ambitious cross-London approach to retrofit.</p>		

## OPPORTUNITIES for COLLABORATION

Central Government	Major Institutions	Business
<ul style="list-style-type: none"> <li>• Agree a long-term, sustainable funding solution for TfL.</li> <li>• Unlock investment in new infrastructure, particularly transport infrastructure in London and the South East, including a clear plan for rail infrastructure resilience and development.</li> <li>• Provide funding to support digital infrastructure roll out, including 5G.</li> <li>• Provide funding and policy support for an ambitious retrofit programme which reduces emissions and supports energy efficiency.</li> </ul>	<ul style="list-style-type: none"> <li>• Work with the Digital Districts programme to identify opportunities to deploy smart infrastructure and secure investment.</li> <li>• Regulators to support green recovery proposals for additional investment and implement incentives for London's sustainable recovery.</li> </ul>	<ul style="list-style-type: none"> <li>• Maximise opportunities to deliver new digital services and extend coverage of broadband and mobile connectivity.</li> <li>• Support London government to deliver digital inclusion through social value.</li> <li>• Monitor and report on infrastructure investment in London, including jobs and green recovery benefits.</li> </ul>

## CONTRIBUTING to a GREEN and FAIR RECOVERY

Achieving environmental sustainability and growing the green economy	Narrowing social, economic and health inequalities
<ul style="list-style-type: none"> <li>• Maximise opportunities to deliver new digital services and extend coverage of broadband and mobile connectivity.</li> <li>• Support London government to deliver digital inclusion through social value.</li> <li>• Monitor and report on infrastructure investment in London, including jobs and green recovery benefits.</li> </ul>	<ul style="list-style-type: none"> <li>• Ensuring that investment decisions take account of equalities issues and that utilities programmes and others identify employment opportunities for structurally disadvantaged groups, including young people and black, Asian and minority ethnic Londoners.</li> <li>• Keeping fares at affordable levels and focussing concessionary fares on those who need them most.</li> <li>• Support equality of access to digital skills, devices and infrastructure.</li> </ul>



# GLOBAL LONDON

**London's economy attracts high levels of investment, talent, business and tourists to the UK. They're drawn by the capital's world-leading finance, professional services, tech, green and creative sectors; its cultural and education assets; and its diverse and open community. London secured around half of the UK's total foreign direct investment projects and inward visitors in 2019. Over a third of the UK's international workers are based in London. London's higher education institutions attract students from over 200 countries, with a net impact of £4.6 billion annually.**

But London has been hit hard by the collapse in international travel and business confidence. Spending by overseas tourists fell by £7.4bn and global FDI flows halved in 2020. Forecasts suggest the volume of air passenger flows will not return to 2019 levels until 2023. Maintaining and strengthening London's international reputation as a safe and attractive destination for businesses, visitors and students is critical for recovery.

## Central Activities Zone

London's central districts are home to a rich ecosystem of business, culture, night life, hospitality and retail, providing jobs and opportunities for people across London and the south east. But the impact of social

distancing and travel restrictions has been dramatic. There is a need to rapidly reimagine the CAZ, as part of a polycentric London – a place that people want, rather than need, to visit so that the London remains a flexible and exciting inward investment location of choice.

## Visitor economy

London is the world's third most popular city for international tourism with 21.7 million visitors in 2019 and tourism accounting for almost 12% of its GDP. And as the UK's single biggest draw for foreign visitors, it plays a critical role in attracting tourists to all regions of the UK. The collapse of international travel and restrictions on cultural and entertainment venues have decimated the capital's visitor economy. Alongside a full reopening of international travel, London's recovery will depend upon relaunching it as one of the world's greatest destinations.

# 21.7m

**London is the world's third most popular city for international tourism with 21.7 million visitors in 2019 and tourism accounting for almost 12% of its GDP.**



## Culture, entertainment and events

From Hampton Court in the west to the O2 in the east, London's museums, palaces, theatres, cultural and music venues act as a global shop window, showcasing incredible talent and diversity. It's a continually evolving sector, with exciting new cultural offerings across all of its diverse neighbourhoods. Making progress on major new developments such as East Bank, protecting London's grassroots venues, kickstarting its night-time economy, and bringing major exhibitions and events back to the capital will play an important role in driving London's recovery.

## Promotion and investment

London is home to more major company headquarters than any city in Europe and is a world-leader in sectors ranging from green finance to visual effects. Many of its boroughs are home to globally significant sector clusters which attract foreign direct investment and global talent. The UK's recovery cannot be secured without maintaining this track record of success. That means promoting London as a business destination, through trade missions, conferences and events, providing a strong pipeline of investment opportunities, and securing worldwide export markets for the products and skills of firms across all of London's growth sectors.

## Our ROLES in RECOVERY

GLA Group:	Sub-regions:	Boroughs:
<ul style="list-style-type: none"> <li>• Deliver city-wide international promotion and marketing through London and Partners, and support for sectoral bodies such as Film London.</li> <li>• Provide support London's cultural sector and advocate for the safe reopening of international travel.</li> <li>• Promote domestic and international tourism.</li> <li>• Drive global collaboration which promotes London's competitive position and status.</li> </ul>	<ul style="list-style-type: none"> <li>• Coordinate investment pipelines and support international promotion of investment opportunities.</li> <li>• Identify and share best practice in support mechanisms for businesses which drive innovation.</li> </ul>	<ul style="list-style-type: none"> <li>• Support cultural, entertainment, sporting and tourism venues as part of overall reopening and promotions campaign.</li> <li>• Support night-time economies and diverse town centres which enhance the diversity of London as a destination.</li> <li>• Identification and promotion of globally significant investment opportunities, particularly in major infrastructure, commercial and housing developments.</li> <li>• Broker contacts between global players and high potential growth businesses to help them establish and grow as part of positively reinforcing ecosystem clusters.</li> </ul>
<p>Joint working across GLA, Central London Forward and key boroughs to reopen the CAZ and enable the re-positioning of London's central districts as part of a complementary offer combined with the assets of the wider city and country.</p>		



## OPPORTUNITIES for COLLABORATION

Central Government	Major Institutions	Business
<ul style="list-style-type: none"> <li>• Support for an immigration and regulation regime which enables London to remain a magnet for talent.</li> <li>• Global promotion of London's growth sectors – partnership between Department for International Trade (DIT), London &amp; Partners (L&amp;P), SRPs and others.</li> <li>• Partnership to re-establish London as a premier tourist destinations and gateway to the wider UK.</li> </ul>	<ul style="list-style-type: none"> <li>• Promotion of research and innovation networks across London's universities with connections into the Golden Triangle and beyond illustrating the UK as a global IP powerhouse.</li> <li>• Identification of investment and scale-up opportunities coming out of higher education and research bodies for global promotion.</li> </ul>	<ul style="list-style-type: none"> <li>• Engagement on investment and export opportunities – with help from L&amp;P and others to spread the message and secure business worldwide.</li> <li>• Participation in planning to bring back visitors, reopen central London, and drive increased spend and footfall.</li> </ul>

## CONTRIBUTING to a GREEN and FAIR RECOVERY

Achieving environmental sustainability and growing the green economy	Narrowing social, economic and health inequalities
<ul style="list-style-type: none"> <li>• International promotion of London's green economy, including its status as a world-leading centre for green finance.</li> <li>• Improving the sustainability of the CAZ, including the quality of and access to its green spaces for all communities.</li> </ul>	<ul style="list-style-type: none"> <li>• Improving access to employment in London's visitor economy and cultural and entertainment sectors – including through programmes such as the creative skills academy.</li> <li>• Supporting disadvantaged residential communities and expanding access to employment through widening pathways into global growth industries including finance, green and health tech sectors.</li> </ul>

MAYOR OF LONDON

