

GREATER LONDON

Rob Whitehead, Claire Harding, and Nick Bowes

“Lively, diverse, intense cities contain the seeds of their own regeneration, with energy enough to carry over for problems and needs outside themselves.”

Jane Jacobs, Urbanist

GREATER LONDON

A new vision for a better city

Rob Whitehead, Claire Harding, and Nick Bowes

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About London Futures

London Futures has been an ambitious programme to shape the future of London. In partnership with London's leading organisations – including the Mayor, London's boroughs, national government, businesses, charities and universities – this multi-year programme has examined the state of London today and worked with Londoners to create a shared vision for the city to 2050 and beyond. It aimed to deliver a new narrative for London, its role in the UK, and its position in the world.

The first phase of London Futures examined London's recent history and development to the present day. It also looked at the range of challenges facing the city and how these might play out in the near future. This report is the culmination of the second phase, in which we engaged with Londoners on the big questions raised by our first report. This phase spanned the delayed mayoral election and so coincided with the process of Londoners deciding who should next lead their city. In this report, we establish what matters to Londoners and set out a new vision for a better city.

About the authors

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Claire Harding is Research Director at Centre for London. She joined the Centre in 2020 and is responsible for our research programme. Before joining Centre for London, Claire worked at Coram Family and Childcare, and she has also previously worked in mental health and local government consultancy.

Nick Bowes

Nick Bowes is Chief Executive of Centre for London. Most recently, Nick was Mayoral Director of Policy at the Greater London Authority. From 2010 to 2015 he was Senior Political Adviser to Sadiq Khan as Shadow Lord Chancellor, Shadow Secretary of State for Justice and Constitutional Reform, and Shadow Minister for London. Nick has also previously worked at the Royal Society, EEF (now Make UK) and the CBI.

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Members of the Advisory Council served in an individual capacity, and this report should not be taken as representing the views of the organisations with which they are affiliated.

We held five private London Futures roundtables – summaries of which are on the Centre for London website – involving around 80 experts from across London's industries, communities and organisations. They are too numerous to list here, but we are indebted to each one of them. Many other Londoners and organisations have also contributed their time and energy to London Futures, and we are extremely grateful to all of them for their assistance and cooperation.

A special mention is due to the team that designed and built the [Your Future London](#) website: Sérgio Cameira, Laura Pye and their colleagues. Huge thanks are also due to Centre for London's trustees and staff members, some of whom have since moved to new pastures. All contributed their thinking, camaraderie and many hours of effort to this project at a time of extraordinary pressures and constraints. They include the project's originators, Ben Rogers and Richard Brown, for their sagacity and deft direction; Researcher Mario Washington-Ihime; the External Affairs team including Diana Szteingberg, Caroline Coxhead, Jo Corfield, Kate Spiliopoulos, Amy Leppänen and Megha Hirani; and the Development and Operations teams including Max Goldman, Denean Rowe, Rachel Heilbron and Johnathan Tuck. Nonetheless, the views in this report are solely those of the authors, and all errors and omissions remain our own.

This research was dependent on the support of a wide range of London organisations, companies, charities, foundations and individuals to whom we are incredibly grateful. From the outset, all have been generous with both funding and advice. We look forward to continuing to work together in the cause of a greater London in the years ahead.

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Centre for London is an independent charity and has editorial control over its work. Centre for London presents this report in order to stimulate vital public debate. While individual sponsors agree with the broad outline of the arguments made in this report, they should not be taken to agree with every word or recommendation.

Forewords

Three decades of growth have propelled London from a declining, depopulating and written-off city to a surging metropolis at the centre of international networks for people, ideas and trade. When we first embarked on this project in 2019, however, it felt for the first time in a generation that London's continued success could not be taken for granted.

A number of factors came together to create this uncertainty. First, Brexit raised questions about London's future role as an outward-facing global trading city; second, resentment from the rest of the UK was seeping into public policy narratives and shifting them in a direction increasingly hostile towards London.

However, back then we could not have foreseen the COVID-19 pandemic, which hit the city hard in spring 2020. Thousands of Londoners lost their lives, and most have been affected by the virus in some way or other. The disruption caused by lockdowns and other restrictions has also raised enormous questions: could changes to the way we live and work undermine the very basis of London's success?

While it still feels too early to know whether these are permanent structural changes, what we do know – from our own work and from other studies – is that Londoners have reassessed what matters to them and their families. Some of these changes are completely new, while others represent the acceleration of pre-existing trends. Together, they might transform how the city functions.

While London is a resilient city – surviving plague, war and fire – its resilience is also a timely reminder that its continued success cannot be assumed. In living memory, London shrank, and some saw signs of terminal decline. We are confident that London will bounce back this time, but that doesn't mean it will continue unchanged. Periods of upheaval and transition can be painful and last for many years.

Our findings confirm what might seem obvious: because of Londoners' exposure to the fragility of city life – and because so many things we take for granted have been threatened – it is issues like safety, health, resilience and the environment that Londoners are most concerned about today.

Decisions taken by the city's leaders will be pivotal in determining whether this is an inflection point for London – leading to stagnation – or merely a blip on an otherwise upward trajectory. This critical and timely report is intended as essential reading for London's leaders, as well as a source of inspiration and ideas for all those in decision-making roles. Building on the earlier London at a Crossroads report, Greater London presents new evidence and thinking on what matters to Londoners, what we value, and where the city's future should lie.

Creating this report has been a monumental project. Enormous thanks are due to the whole team at Centre for London for assembling such a huge amount of data and synthesising it into a coherent and impactful proposal. I am extremely grateful to all our funders for their support, without which the work simply could not have happened.

If our work provokes thought, stimulates discussion and proves useful to those taking key decisions, then it will have had the intended effect. For the city to emerge from this dark period, and for the sake of Londoners, the decisions taken now must be the right ones.

Dr Nick Bowes
Chief Executive, Centre for London

Cities like London create extremes: of wealth and poverty, of opportunity, of health and sickness. The COVID-19 pandemic brought this into sharp focus, and has reshaped how Londoners relate to the city they call home. That's why the second report from London Futures could not be timelier. The experiences of the city's residents in this report show that the benefits of living in the capital are not shared equally and that London's many strengths often mask its inequalities.

Over the last year we've seen that you are far more likely to become seriously ill from COVID-19 if you breathe polluted air, live in crowded housing, have a precarious and inflexible job, or experience financial insecurity. Londoners are more likely to be in those circumstances in the first place if they are Black, living in poverty, or exposed to other structural inequalities and discrimination. These health inequalities are not a result of COVID-19: they were here all along. But as this report confirms, London can do better. We've designed the system we live in, and we can redesign it. Inequality is not an inevitable part of a post-COVID London.

Currently, London's recovery and its future are uncertain. What is certain, however, is that Londoners want their future to be fairer. For so much of the last year, we have focused on all the things we haven't been able to do. Together – as individuals, organisations, businesses and policymakers – we now have a responsibility to shift the focus to what we can, and should, start changing. Our city has wonderful assets that could promote good health for all. This report explores how we can build back, not just better, but fairer – both for London and the UK.

Andy Ratcliffe

Executive Director of Programmes, Impact on Urban Health

Chapter 1: A new vision for a greater London



London is a great city. By many yardsticks it is world-leading. Its assets, institutions, infrastructure and reputation – coupled with Londoners’ dynamism, ideas and creativity – create enormous prosperity. As a result, London makes a huge contribution to the UK both economically and culturally. In recent decades, its growth in population, jobs and productivity have been driven in part by greater openness, freer markets and deeper integration into the global economy. For those that can afford the high costs there are few better places to live, work and play.

Alongside the affluent, however, millions live in poverty, have insecure and poorly paid jobs, experience homelessness, or have a low quality of life. These inequalities blight far too many lives, and hold back the progress of the city as a whole. Blind to these aspects, some think London’s success blunts the rest of the UK. This increasingly prevalent view needs to be challenged, not least because of the dire potential consequences for the most vulnerable Londoners. What’s more, London must also recover from coronavirus, tackle doubts raised about the future role of cities, cut the pollution that causes poor air quality and global warming, and reposition itself as a global centre outside the European Union.

London’s leaders can and must do better. Based on a full year of researching London’s biggest issues, listening to Londoners, and working with businesses, universities, London government, charities and community groups, we found that:

- There is a strong consensus that more needs to be done to make London fairer and take action on the climate.
- Londoners are highly concerned about the interlinked issues of personal safety, health, and protection from future epidemics.
- Londoners also prioritise housing and homelessness, as well as a recovery that delivers jobs and economic growth after the pandemic.

Responding to these concerns, we propose a new vision and ambition for London and Londoners. We also suggest possible foundations for a new narrative of London’s relationship with the UK.

London has been pummelled by the pandemic. Yet we find that our city has far from reached its peak. London remains an extraordinary engine of human relationships, and these feed its dynamism, innovation and social fabric. We should enhance its power to connect us – but that is not enough in itself. We also need greater protections for all, especially for the most disadvantaged and vulnerable.

In 1965 London’s boundaries were enlarged and renamed “Greater London”. Now we are calling for a truly greater London, a more dynamic and fairer city. A greater London would be greater for Britain – and, by taking the lead in tackling environmental challenges, it would be greater for the planet too.

Public policy should shape the future rather than just respond to it. This report aims to kickstart fresh thinking among those in power on what Londoners want from their city. Together, they can bring about a London that works better for all Londoners, for Britain and for the world.

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Our vision for a greater London is for every Londoner to...



Have **enough money** to afford everyday essentials.



Have **a home** which is in good repair, large enough for their needs, and where they feel secure.



Not suffer from **illnesses which could be prevented** through better homes, neighbourhoods and employment.



Have access to **high streets, parks and public spaces** that work well for families, friendships, businesses and communities.



Have access to **learning** throughout their life so they can use their talents to the full.

and for London to be...



Rapidly post-carbon, adopting new circular economy and pro-nature approaches as the new normal.



The **best physically and digitally connected city** on the planet.



The **safest city** anywhere, especially for women and girls.



The most **welcoming** city in the world for visitors, the hardworking, the talented, and those most in need.



Governed to the highest standards – including preparedness against future threats – and home to the most **innovative and dynamic** markets, businesses and organisations in the world.

What we mean by fairness

Throughout this project, Londoners have been told us that our city needs to be fairer. (We agree.) However, though very few would disagree with this, people sometimes have different ideas about what “fairness” entails. For London to make a good life possible for its citizens, compete internationally for economic development, and respond effectively to the climate crisis, we think the following interlocking aspects of fairness are essential.

A decent minimum

Everyone deserves a safe and secure home, enough money for food and essential bills, access to essential services, and good healthcare. Currently, many Londoners lack these, and poverty rates remain the highest in the UK after housing costs are removed. This causes great unhappiness, but it also stops Londoners – especially children – from achieving their potential. It's hard to do homework when there's no space and not enough healthy food.

Access to educational opportunity

Some of London's schools are among the best in the country for supporting social mobility, but too many people still don't have the chance to get the qualifications they need for a real choice of jobs. Further education – and adult education for people who need to reskill during their career – are particular barriers.

Freedom from discrimination

Life in London is harder if you are from a minority community, and for women compared to men. Consequently, a significant majority of the population are in at least one group that experiences systematic discrimination. Regrettably, this blights millions of lives and makes it harder for people to find the right housing, access their chosen jobs and training, and get their voices heard. Beyond being unfair, it also means the city doesn't have access to the range of talent it needs to succeed.

A political voice

In an ideal democracy, people from every part of London's community – in terms of age, ethnicity, gender, social/professional background and more – would be represented, have a voice and be listened to. On some measures, London's political cohort of MPs, Assembly Members and councillors has become more diverse in recent years, but many Londoners still feel locked out of the decisions which shape their lives and communities.

Environmental justice

In London and other big cities, disadvantaged and excluded communities are already bearing the brunt of polluted air, the risks of excess heat, and more frequent extreme weather events caused by climate change. If decarbonisation policies are not handled well, they could disadvantage the poor and other marginalised groups even more. We will not achieve net zero unless we bring all London's communities together and ensure that the costs of decarbonisation are met by those most able to pay them.

Why we are optimistic about London's future

Cities are, arguably, humanity's greatest invention.¹ Over the last 50 years, urbanisation has gathered pace globally. More than half the world's population now lives in cities, producing 80 per cent of total economic output. Cities are also part of the solution to our multiple environmental crises, being dense and efficient as well as crucibles of ingenuity and innovation.

The COVID-19 pandemic has now raised the spectre of a post-city future. It has accelerated mass adoption of online tools for collaboration, suggesting to some that the age of urbanisation might wane – especially as travel and consumption are contentious as never before in an age of climate emergency. Few places have been subject to this speculation as much as London, and some argue that time's up on the phenomenon of the densely packed megacity.² We disagree.

Understanding the factors that drive the success of cities over time suggests good grounds for optimism about London's future. Like other successful cities, London's prosperity and growth have, for two millennia, been driven by two essential ingredients: the conditions for networks of high-quality relationships, and protection of its citizens. Together, these drive business success, public sector innovation, good governance, social support

and resilience. London has been one of most successful cities in history because Londoners have often found the right balance between protection against threats and openness to newcomers. This adaptation created a thriving centre of trade and eventually a major seat of political power. For a while it was the most populous city on the planet.

Although London long ago lost that crown, it is still amongst the most economically productive places on Earth, and one of the most desirable to locate in. This is due to a number of factors, including its physical density, wide labour pool, extensive transport network, stable legal and regulatory environment, use of English, large international population and far-reaching global connections. London's reputation, brand and identity remain among the strongest of all global cities.

At the core of this success has been the city's ability to host and connect millions of people. The post-COVID-19 era will undoubtedly see more home working, with some local neighbourhoods flourishing as a result. But we expect that Londoners will also continue to flock to the city's centre for the benefits of in-person collaboration, networking, and the rich hospitality and cultural offer. For many, these will outweigh the costs and disruption of commuting, at least for part of the working week. Collaboration of groups, particularly at scale, generates more and better outputs, as well as new connections, ideas and innovations. This type of collaboration is humankind's magic power,³ and cities are its most tangible expression.

As we have shown, London is at a crossroads today. But if the city can reinvigorate itself as an engine of relationships and dynamism, it can both revive and thrive – countering the threat of an economy largely transacted online, and acting as an antidote to hardship, insecurity and environmental disaster. Done right, we could embark on a new chapter of inclusive, sustainable prosperity.

Chapter 2:

What we need to get there



A new narrative: Greater London, greater Britain

Greater London is a vast and vital part of the UK's economy. Nearly one-quarter of all UK output is generated inside the M25. But London's relationship with the UK is complex, and at times antagonistic. Over-reliance on London's productive power is a bad thing for the country, and the capital's concentration of national economic, political and cultural life can provoke discontent.

London is a huge magnet for international talent, and home to world-beating clusters in finance, tech, professional and business services, life sciences, higher education, and the creative and cultural industries. Drawing in the world's best talent helps London generate new ideas and innovations that turn into business success stories, ground-breaking research, compelling new media, and advances across almost every field.

This success means London pays around £40 billion more in tax than it gets back in public spending each year. This revenue is crucial in normal times, but particularly so now given the huge cost of dealing with COVID-19. The UK also benefits from London's success in many other ways, with millions of international visitors to London travelling elsewhere in the UK and spending billions each year across the country.

These arguments alone mean that London shouldn't be spurned in the nation's priorities. But more than that – as we have documented throughout London Futures – London has its own challenges of inequality, fairness and vulnerability that need urgent attention.

Resentment towards London isn't new, but it has worsened in recent years, particularly since the Brexit referendum. Dissatisfaction with institutions and elites in the capital (e.g. politicians in Westminster, the BBC, the financial sector) can, at times, be lazily translated into resentment against the city and those who live in it.

This discontent has bred misconceptions about how London's economy has been affected by the pandemic. On many measures, London has fared worse than any other region from the economic fallout, with central London's economy being hit particularly hard and poverty rising in many boroughs. Outside London this is poorly understood, and many assume the city will bounce back more easily than other parts of the country.

The current government's "levelling up" programme rightly targets areas that are economically underperforming. However, as currently framed, it risks ignoring deep social issues in London, with consequences for London's businesses, public services and critical infrastructure. By accident or design, London could end up being levelled down. Not only could it see large reductions in government spending, but it could also experience worsening health, public safety, housing and education outcomes, as well as deepening problems of poverty and inequality. In addition, employers in the city could find it harder to fill skilled vacancies or attract high-calibre staff to live here.

Worse, it could foreshadow a reversal in London's devolution settlement with long-term economic and social costs. Like the rest of the country, London needs more devolution to tackle its challenges, not less. London does not need to be poorer for other parts of the UK to be richer. London's success matters to the whole country. Given the enormous amounts London contributes to the national coffers, any weakening of the city's economy is bad news for the whole country.

So we need to change the narrative. But London's advocates find it hard to talk about its importance to the UK economy without sounding arrogant. Any new narrative must demonstrate London's role in the UK economy while also building understanding of the fragility and vulnerability that blights the lives of so many Londoners. In a time of great uncertainty and multiple overlapping public priorities – including new pressures on the UK's overall political settlement – London's leaders must rally around a new case for devolution and investment in Greater London.

New ambitions: 10 priorities for a greater London

We have identified 10 priorities for making London greater. Taken together, we believe these new ambitions will help Londoners build new connections with each other and people around the world, stimulating dynamism and innovation across all sectors. They will also introduce a new era of protections for all Londoners – especially the most vulnerable – while bringing forward much-needed improvements to our environment, tackling the climate emergency and other challenges. Finally, they sow the seeds for the renewal of London's governance and long-term thinking, building the city's adaptability and resilience to future threats.

In the next section we set out the priorities for a greater London in the medium term, to 2030. We also outline our longer-term aspirations to 2050 and suggest measures that will help the city achieve them.

Our ambitions and aspirations for London's future

In this section we set out our priorities for a greater London, including some targets and aspirations for the medium and long term. We suggest policies and policy areas to focus on, and who, broadly, might be able to make plans a reality.

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TARGETS TO 2030

Foodbanks should not be needed by 2030.

Benefits and statutory minimum wage rise to match the real cost of London living.

WHAT IT TAKES, AND WHO CAN MAKE IT HAPPEN

National government should make sure that benefits match the needs of living in London and are adapted to the real cost of living in the city.

2030

2050

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PRIORITY

All Londoners should have enough money to afford everyday essentials.

ASPIRATIONS TO 2050

All Londoners have a decent standard of living so they can fully participate in city life.

WHAT IT MIGHT TAKE, AND WHO COULD MAKE IT HAPPEN

National government and the GLA should regularly review financial support for Londoners in context of emerging social, technological and environmental trends.

National government, working with London stakeholders, should create adaptive London-focused institutions to lead on and manage benefits/minimum income provision as part of the evolving devolution settlement.

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TARGETS TO 2030

- No one has to spend more than one-third of their income on rent.
- No one is forced to live in a non-decent home or be stuck in temporary accommodation.
- Rough sleeping reduces to below 2012 level.

WHAT IT TAKES, AND WHO CAN MAKE IT HAPPEN

- National government should increase the level of local housing allowance for renters, so that adequate living and working space is not just a privilege of the wealthy.
- National government should give London boroughs, housing associations and the Greater London Authority (GLA) greater powers and access to funding to build more council homes and other types of affordable housing.
- National government should devolve powers to city and local government to allow for better regulation of landlords.

2030

2050

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ASPIRATIONS TO 2050

Ratio of London house prices to average income is same as rest of the UK.

Rough sleeping is largely eradicated and temporary housing need reduced significantly.

WHAT IT MIGHT TAKE, AND WHO COULD MAKE IT HAPPEN

National government, the GLA and boroughs should work with private providers to enable large-scale social and private housebuilding.

National government should end inflationary home-purchase incentives.

National government should devolve control of housing-related benefits to London boroughs.

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Londoners do not suffer from illnesses that could be prevented through better homes, neighbourhoods and employment.



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PRIORITY

Londoners do not suffer from illnesses that could be prevented through better homes, neighbourhoods and employment.

TARGETS TO 2030

Diminish the link between neighbourhood deprivation and healthy life expectancy.

90 per cent of all 11-year-olds at a healthy weight.

WHAT IT TAKES, AND WHO CAN MAKE IT HAPPEN

The GLA and boroughs should strengthen requirements for play and exercise space in housing and public spaces through the London Plan and other local plans.

Food providers should work with schools and local authorities to improve access to healthy food for the most deprived households.

Employers should adopt the GLA's healthy workplace standards.

National government should explore putting environmental rights (e.g. the right to clean air, green space, and clean water) on same legal basis as human rights.

2030

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ASPIRATIONS TO 2050

The link between neighbourhood deprivation and healthy life expectancy is eliminated.

WHAT IT MIGHT TAKE, AND WHO COULD MAKE IT HAPPEN

The GLA should lead employers, landlords and other stakeholders in focusing on housing, transport, active travel, play, work, and systemic drivers of inequality. It should also lead the response to emergent issues that could worsen health inequality.

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All Londoners should have access to high streets, parks and public spaces that work well for families, neighbours, friends, businesses and community groups.



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All Londoners should have access to high streets, parks and public spaces that work well for families, neighbours, friends, businesses and community groups.

TARGETS TO 2030

All Londoners have a real opportunity to influence changes to the places they live, study and work.

London's usable green, riverside and canalside spaces increase in quantity and quality; they are used by the full diversity of Londoners.

Public play spaces in London increase for all age groups.

WHAT IT TAKES, AND WHO CAN MAKE IT HAPPEN

The GLA, boroughs and developers should promote and require genuine involvement in high street management and in the planning system.

The GLA, boroughs, developers and other public space managers should ensure that people of all ages and needs are able to use spaces through improved neighbourhood planning.

The GLA and boroughs should spend half of all public and developer funding on public realm improvement through community/neighbourhood structures.

2030

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All Londoners should have access to high streets, parks and public spaces that work well for families, neighbours, friends, businesses and community groups.

ASPIRATIONS TO 2050

All London's neighbourhoods, homes and public spaces have evolved to be compatible with net zero living.

London's most dynamic areas match the best in the world for creativity, collaboration and productivity.

All Londoners live within 10 minutes' walk of a quality public, green or waterside space.

WHAT IT MIGHT TAKE, AND WHO COULD MAKE IT HAPPEN

Boroughs should establish, with government and GLA support, new "pathfinder" neighbourhood programmes to trial innovative approaches and showcase new ideas for dynamic, low-carbon green places.

The GLA and the City of London Corporation should lead on creating new partnerships and institutional arrangements that will drive the dynamism and sustainability of central business and cultural areas.

Boroughs, the City of London Corporation, the Royal Parks, the Port of London Authority and the Canal and River Trust should invest to improve access to high-quality outdoor space for all Londoners.

Our ambitions and aspirations for London's future

In this section we set out our priorities for a greater London, including some targets and aspirations for the medium and long term. We suggest policies and policy areas to focus on, and who, broadly, might be able to make plans a reality.

PRIORITY

Every Londoner should have access to learning throughout their life so they can use their talent to the full.



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PRIORITY

Every Londoner should have access to learning throughout their life so they can use their talent to the full.

TARGETS TO 2030

Level the playing field between further and higher education.

Enable more disadvantaged Londoners to access international education opportunities.

WHAT IT TAKES, AND WHO CAN MAKE IT HAPPEN

National government should boost teaching grants and capital funding for further education, targeted to jobs which support net-zero London.

National government should fully devolve the Further Education budget to London, including funding for 16- to 17-year-olds.

Universities and the GLA should consider creating an enhanced package of support (“Turing Plus”) with the aim of encouraging disadvantaged Londoners to study in European and other international locations.

2030

2050

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PRIORITY

Every Londoner should have access to learning throughout their life so they can use their talent to the full.

ASPIRATIONS TO 2050

London's schools, colleges and universities deliver world-class education to more Londoners.

WHAT IT MIGHT TAKE, AND WHO COULD MAKE IT HAPPEN

London's universities, colleges and schools should evolve to meet new challenges and respond to business and social priorities.

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PRIORITY

London rapidly decarbonising, with new limits on pollution, carbon, and other natural resources. New circular economy, regenerative and pro-nature approaches are adopted as the new normal.



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PRIORITY

London rapidly decarbonising, with new limits on pollution, carbon, and other natural resources. New circular economy, regenerative and pro-nature approaches are adopted as the new normal.

TARGETS TO 2030

Heating is electrified in 40 per cent of homes.

School drop-off car journey peak is eradicated.

Car-based travel is 95 per cent eliminated in the Central Activities Zone.

Air pollution is within WHO limits.

WHAT IT TAKES, AND WHO CAN MAKE IT HAPPEN

National government should create and finance a gas boiler scrappage scheme as well as funding enhanced grants for insulation and heat pumps, with the programmes to be run by London's government.

Boroughs should implement School Clean Air Zones and bicycle parking at all London schools.

National government should develop a new strategy for private hire vehicles that works for London's wider mobility, inclusion and sustainability goals.

2030

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PRIORITY

London rapidly decarbonising, with new limits on pollution, carbon, and other natural resources. New circular economy, regenerative and pro-nature approaches are adopted as the new normal.

ASPIRATIONS TO 2050

London is seen as the most sustainable and pro-nature megacity in the world.

London's economy is 95 per cent circular.

The river Thames becomes a clean energy source, a highway, and a sustainable shipping route.

Zero-carbon heating is in 99 per cent of homes.

WHAT IT MIGHT TAKE, AND WHO COULD MAKE IT HAPPEN

National government and the GLA should stimulate and enable the widespread use of hydrogen-powered vehicles/vessels for passenger and freight journeys.

The GLA should set a target to reduce private car ownership to below 20 per cent of households.

The GLA should plan for (and boroughs should introduce) large-scale solar farming in suitable locations.

The GLA should adopt new approaches to enable a highly integrated multi-modal transport system that offers low-carbon travel options to all Londoners.

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PRIORITY

London should be the best physically and digitally connected city on the planet. London should have infrastructure for public, active, micro and electric (and other clean fuels) passenger and freight transport, as well as world-class digital connections which help the city work for everyone.



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TARGETS TO 2030

London's public transport system is seen as the best-in-class globally.

At least 80 per cent of trips in London are zero-emission (walking, cycling or electric-powered).

Sustainable alternatives to short haul flying are developed.

Hours lost to congestion are to reduce year-on-year.

London is seen as a world leader in transition to zero-emission freight.

All Londoners have access to high-speed broadband; mobile "notspots" are eradicated.

WHAT IT TAKES, AND WHO CAN MAKE IT HAPPEN

National government, the GLA and boroughs should coordinate on the urgent transition to low-carbon transport, including sustainable financing for TfL.

The GLA should implement road user charging to replace the Ultra Low Emissions Zone (ULEZ) and Congestion Charge.

National government should work with national and international partners to provide London with direct rail services to at least seven major international cities.

The GLA, boroughs, the Port of London Authority and the City of London Corporation should work with partners to enable and invest in new interchanges for greener "last mile" freight, waste and delivery journeys.

National government should legislate for minimum service standards connecting all citizens to digital services.

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ASPIRATIONS TO 2050

Private car ownership is halved on 2020 levels, and active travel mode share doubled.

Congestion hours lost are reduced to 50 per cent of 2015 level.

London has direct rail services to over 20 international cities.

London is a leader in low-carbon and mixed-mode mobility, harnessing electricity and other clean energy sources.

WHAT IT MIGHT TAKE, AND WHO COULD MAKE IT HAPPEN

The GLA and boroughs should reallocate road space to pedestrians, micromobility and public transport.

National government should invest in high-speed rail to replace short-haul aviation.

The GLA and boroughs should enable networks of affordable vehicle-sharing schemes (van, car, micromobility) across all neighbourhoods.

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PRIORITY

London should become the safest city anywhere, especially for women and girls.

Londoners should not experience hate crime, street harassment, or domestic/intimate partner violence.



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TARGETS TO 2030

- All crime types reducing.
- Rise in hate crime is reversed.
- All Londoners experiencing hate crime or street harassment feel confident to go to the police if they choose to, with police adequately resourced to respond.
- London becomes the safest global city in which to grow up, live and work as a woman.
- All Londoners fleeing domestic violence can access a refuge space within 24 hours.

WHAT IT TAKES, AND WHO CAN MAKE IT HAPPEN

- National government, working in partnership with the GLA and boroughs, should undertake an independent review of London's policing needs, using the findings as a basis for creating a new Greater London Police Service.
- The Home Office, the Ministry of Justice, City Hall and boroughs should establish a new Greater London Criminal Justice Council.
- The GLA and boroughs, working with key campaign groups, should co-develop a charter on how Londoners treat each other (covering street harassment, hate crime, hate speech, allyship) and promote it through schools, colleges, universities and public campaigning.
- Mayor's Office of Policing and Crime should audit perceived safety and reported crime in all London parks and around all London stations.
- National government should improve funding for youth services.

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Londoners should not experience hate crime, street harassment, or domestic/intimate partner violence.

ASPIRATIONS TO 2050

Reports of hate crime, domestic violence and street harassment are down 75 per cent on 2019 levels.

No section of London's community is over-represented at any level of the criminal justice system. Londoners have increasing confidence in the Metropolitan Police regardless of ethnicity, age, sexual orientation or location.

WHAT IT MIGHT TAKE, AND WHO COULD MAKE IT HAPPEN

National government and the GLA should implement the recommendations of the independent review of London's policing needs, and create a new Greater London Police Service.

National government and the GLA should increase year-on-year investment into the public health approach to tackling crime.

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PRIORITY

London should be the most welcoming city in the world for visitors, the hardworking, the talented, and those fleeing persecution.



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PRIORITY

London should be the most welcoming city in the world for visitors, the hardworking, the talented, and those fleeing persecution.

TARGETS TO 2030

London attracts and welcomes the people it needs for its economy, as well as people who need refuge from persecution.

London retains and improves its reputation and global brand as an open and tolerant creative, cultural and financial hub.

WHAT IT TAKES, AND WHO CAN MAKE IT HAPPEN

The GLA and London & Partners should boost promotional activities to sell London as a destination and a location to do business.

National government should enable a London-specific migration settlement – to be run by the GLA – for employment, student and refugee visas.

National government, local authorities and civil society should work together to finance and deliver better facilities and services for refugees.

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London should be the most welcoming city in the world for visitors, the hardworking, the talented, and those fleeing persecution.

ASPIRATIONS TO 2050

London's businesses and organisations have open access to international talent, but also share responsibility for nurturing and protecting Londoners.

London is an international beacon for welcoming those fleeing persecution and suffering.

Londoners have outstanding levels of access to European and international educational opportunities.

WHAT IT MIGHT TAKE, AND WHO COULD MAKE IT HAPPEN

London's business organisations should unite to inform and shape London and national immigration policy.

National government should create new institutional roles and resources for refugee services and human rights protection in Greater London.

The GLA should coordinate London universities, colleges and schools in the creation of networks and links to Europe and beyond.

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PRIORITY

Greater London should be governed to the highest standards, including preparedness against future threats.

London should host the most innovative and dynamic markets for products, services and capital of all major cities.



2030

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Greater London should be governed to the highest standards, including preparedness against future threats.

London should host the most innovative and dynamic markets for products, services and capital of all major cities.

TARGETS TO 2030

- Better channels to exist for the voice of business in city affairs.
- Better channels to exist for the voice of marginalised groups, and access to power.
- Creation of a new enhanced devolution deal for London.
- Creation of a periodic strategic review of city governance.
- London is well prepared against new threats.

WHAT IT TAKES, AND WHO CAN MAKE IT HAPPEN

- National government, consulting with London stakeholders, should develop a new proposition on further powers for Greater London (including fiscal powers). These would be put to a referendum, leading to a new Greater London Government Act.
- The GLA, neighbouring counties and government should establish a new Wider South East Cooperation Council to coordinate on housing, resilience and infrastructure.
- The GLA should propose a new and independent institution to provide foresight for, review and improve London governance.
- The GLA, working with partners, should develop new city resilience plans to tackle threats (including excessive heat and flooding).

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PRIORITY

Greater London should be governed to the highest standards, including preparedness against future threats.

London should host the most innovative and dynamic markets for products, services and capital of all major cities.

ASPIRATIONS TO 2050

London's institutions and governance are clear and established, functioning well across all layers (mega-region, city, Central Activities Zone, borough, neighbourhood).

London's powers to self-govern, raise and levy taxes are clear and coherent within our evolving political and constitutional settlement.

WHAT IT MIGHT TAKE, AND WHO COULD MAKE IT HAPPEN

National government should make a clearer separation between the local and national functions of Greater London's institutions. New national bodies should be created where needed.

London's key institutions should develop new collaborative approaches to innovation that regularly review city governance and operations – exploring new opportunities as well as threats to future generations.

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Chapter 3:

London's past and future



London: a brief history

Although population size is perhaps the crudest measure of a city's success, London was indisputably the primary global urban centre for a significant portion of its history. For around 100 years, during the nineteenth century and at the beginning of the twentieth, London was the largest city in the world. Until recently, the most dramatic change in London's fortunes had come with the death and destruction of the Blitz. The war's aftermath, however, also had other profound impacts – not least the creation of the welfare state and the publication of the Abercrombie Plan. In the decades that followed, certain factors – including slum clearances, the growth of the train network, mass car ownership, industrial and regional policy, and rising living standards – combined to redistribute London's population to the burgeoning suburbs and then to the home counties beyond.

These changes built a discontinuous megacity in southeast England with the capital at its heart. Local government structures evolved in response, and in 1965 the city's boundaries expanded with the creation of Greater London. It was to be governed by the Greater London Council (GLC), swallowing chunks of the home counties, replacing London County Council, and dissolving the ancient county of Middlesex. Greater London was subdivided into 32 boroughs, bar the ancient City in the historic centre. Nevertheless, Greater London's population declined. Eventually, the GLC fell foul of national government and was abolished in 1986 – indicative perhaps of a wider slump in the city's fortunes and reputation.

In the 1990s – little remarked on at first – Greater London's population began to grow again. The city's prospects were transforming thanks to the deregulation of financial services, a growing freedom of movement across Europe, a new fashion for city living, and collaboration between local authorities and businesses to think smartly about London's future. London was thus reborn as a “World City”. Eventually citywide civic government was re-established, led by a new Mayor of London, which in turn boosted the city's fortunes.

Since then, London's population and global prestige have boomed. As well as being the UK's political capital, London has become one of a handful of elite global cities, the hyper-productive central nodes of an increasingly interconnected global economy. Against the current of the UK's century-long relative economic decline, London managed to harness the benefits of big city life to become a highly prosperous centre for global financial services, law, consultancy, life sciences, education, and cultural production. Hospitality and entertainment are also a significant part of its success, with galleries, nightclubs, theatres and restaurants that draw people from across the UK, Europe and beyond. This constant flow of people – tourists, students, workers and residents – has in turn enriched the city and fuelled its global “soft power”.

London's current challenges

Nonetheless, London's success in the many global city league tables can mask deep social challenges. The city has persistently high levels of general poverty and child poverty – the highest of any UK region by some measures. Housing costs are a major factor in pushing people into poverty. The capital has more homeless people and people living in temporary accommodation than the rest of England combined,⁴ and rising house prices have driven rapidly growing wealth inequalities. These compound systemic disadvantage for Black and other ethnic minority Londoners – who are paid less, are more likely to be unemployed, and are less likely to own property.

The city as a whole has also suffered from growing pains as its population once again reached and then surpassed its 1939 peak. Roads are congested, air quality is poor, and many neighbourhoods have become run down – even as some prosperous and regenerated districts enjoy new amenities and public spaces. While the city has lower direct carbon emissions than other UK regions, it has a mountain to climb to achieve the Mayor's target of net zero carbon emissions by 2030.

Finally, the city's position in the nation and in the world is less assured than it once was. London has always been viewed with mixed feelings by other parts of the UK, but in the last few years tensions have worsened, fuelled by caricatures of London as a city comprising only “metropolitan elites”. The growing importance of the London economy to UK tax revenues has been matched by growing resentment of the capital's perceived cultural and economic dominance, and national politicians have vied with each other in pledging to divert resources and attention from London.

Despite these pressures, London's global reputation remains strong, buoyed by its cultural offer, openness, talent pool and business environment. London's assets – its built heritage, transport network, business clusters, diversity, creative dynamism, geography, and legal frameworks – remain compelling. But the city's previously unassailable position as the “leading global city in an age of global cities” has been tarnished by the cost of living, pollution, and the uncertainties surrounding new trade agreements and immigration rules following the UK's departure from the European Union.

At the outset of the London Futures project, the question we posed was whether London could continue to seize opportunities and prosper while also addressing its stark inequities. Other challenges to be addressed included the climate emergency, new technologies, changing global trade and power structures, and an ageing population. We concluded the London at a Crossroads report by detailing the major challenges we saw ahead (see Table 1 on the next page).



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Table 1: London's challenges

Key attributes of good cities	Key challenges facing London
Democracy, governance and public services	<ul style="list-style-type: none"> • Limited devolution; underpowered city and local government. • Lack of almost any power over taxes; limited ability to fund core city services like transport. • Lack of joined-up governance across the wider South East.
Liberty	<ul style="list-style-type: none"> • Adapting the built environment while raising design and management standards. • Cybersecurity, intrusive surveillance and unfettered use of new technologies like AI. • Building sufficient homes to meet demand. • Pandemic controls.
Health	<ul style="list-style-type: none"> • Likely long-term COVID-19 health impacts (direct and indirect). • Stubborn or growing health inequalities. • High levels of obesity and inactivity. • Poor air quality. • Unaffordable and overstretched care provision.
Environmental sustainability	<ul style="list-style-type: none"> • Decarbonisation; surface transport; heating; air travel. • Other pollutants causing poor air quality.
Connectivity and mobility	<ul style="list-style-type: none"> • Public transport rehabilitation. • Public transport investment. • Future of air travel. • Car- and van-based congestion.
Security and resilience	<ul style="list-style-type: none"> • Widespread vulnerability to ill health and poverty. • Protection against future epidemics. • Terrorism. • Warming climate.
Diversity and cohesion	<ul style="list-style-type: none"> • Unemployment. • Changing migration patterns. • Racism.
Prosperity and jobs	<ul style="list-style-type: none"> • Coronavirus recovery for central London and fragile business sectors such as hospitality and entertainment.
Quality of place and amenities	<ul style="list-style-type: none"> • Town centres and high streets, especially in outer London. • Accessibility and inclusion. • Housing affordability. • Future of central London. • Future of offices.
Fairness	<ul style="list-style-type: none"> • Housing affordability. • Homelessness. • In-work poverty. • Social mobility. • Racism (including structural racism). • Economic inequality.

Source: London at a Crossroads, Centre for London⁵

London's possible futures

The coronavirus pandemic has introduced new questions and uncertainties where London and other cities are concerned. Amongst other worries, fresh doubts have been raised about:

- The future of major cities themselves.
- Whether London will return to economic and population growth.
- The future of office working and central business districts.
- Closed borders and suppressed tourism.
- Health security and resilience.

London's future is as uncertain as any time in living memory. The city's economic recovery from the pandemic is not assured; nor is its standing in the world, or its path to net zero. We have no guarantee the city will be fairer, safer or more resilient to future shocks. London's population growth, so strong in recent decades, looks likely to drop – and could even reverse. London's governing settlement is also fragile, and for the first time in a generation devolution could be weakened.

In *London at a Crossroads* we delved into some of these uncertainties, including a set of potential scenarios for the city. In this chapter we explore them further.

Will the population grow?

London's population has grown considerably over the last 200 years.⁶ Growth has been both a consequence and a cause of the capital's success as an innovative global city. Before the pandemic hit, the consensus view was that the coming decades would see a continuation of the last 30 years of growth – although the nature of it would be affected by Brexit.⁷

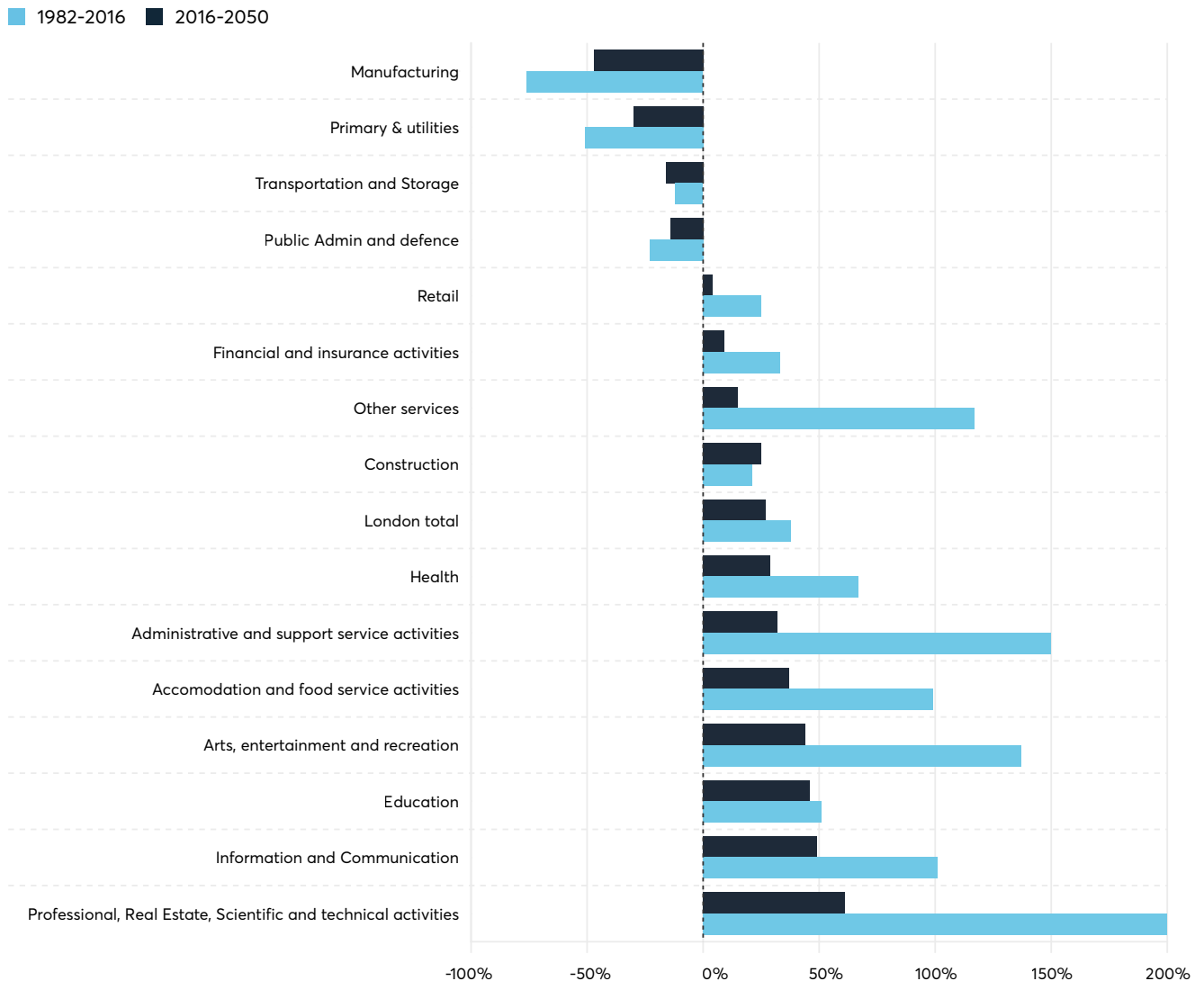
Population projections are notoriously difficult to get right,⁸ not least because population flows are sensitive to policy changes as well as multiple other external factors. The pandemic has compounded this difficulty. Since it began, some commentators have asserted that London's population could decline – with foreign workers returning to their home country, and British citizens deciding that if they don't have to go into the office they might as well live somewhere quieter and cheaper.⁹ Real-time population data is difficult to find and use, but at the time of writing, there is some evidence (albeit disputed) that some foreign-born Londoners moved abroad during the pandemic. On moves within the UK, there is much anecdote but little evidence.¹⁰

What happens next will depend on whether London retains its economic, cultural and social draw for new Londoners – as discussed in Chapter 1. Our city has a very high population churn, driven by both international and domestic home moves. For domestic migrants, there is a pattern of young people moving to London in their teens and early 20s for work or study: some settle for life, and others move back after a few years or decades.¹¹ The signs are that although post-pandemic life will be different, the appeal of London to younger people in particular will persist.

Policymakers have scope to influence what happens to London's population. Most directly, they can cut investment in London, resulting in fewer jobs and worse public services, driving people out of the city. This would hit London's poorest residents hardest, many of whom were already living in very difficult circumstances before the pandemic pushed unemployment claims to their highest for many years.

If London's population shrinks, Londoners could suffer in other ways too. Lower-paid Londoners in service jobs would lose out if their wealthier neighbours were no longer around to buy groceries, takeaways and haircuts.

Figure 1: Employment change projections to 2050



Source: Greater London Authority, London labour market projections 2017¹⁴

People who use public services would suffer: many services are funded per capita, and operating costs don't usually fall proportionately to the number of users. Attempts to decarbonise would suffer, as the relative green success of cities depends on their ability to provide public transport and housing at an efficient scale.

What direction will the economy take?

According to projections produced by the Greater London Authority, the growth in employment that London has experienced in the last 30 years is expected to persist during the next 30, albeit at a slower pace.¹² The GLA expects little change in the sectors driving employment growth: the professional services, information and communication, culture and hospitality sectors will continue to expand, while the decline in public administration jobs and some industry (such as manufacturing) is expected to continue – though not as pronounced as before. These are headline trends only: within each sector and sub-sector there are likely

to be variations.¹³ These projections are based on trends and very broad categorisations, so they will miss the innovations and political decisions that could lead the city's economy to change course. Few could claim to have predicted in the early 1980s that London would become a global leader in professional services and the creative industries, or have foreseen a boom in its visitor economy. But as we saw in London at a Crossroads, there are major factors that will inescapably shape our future – including decarbonisation, the ongoing digital revolution, and the ageing population. We would now add to those the new push towards social, environmental and governance goals across the private sector, the deeper issues of how business relates to wider societal goals, and a likely pivot toward greater resilience – especially in physical supply chains.

What will an ageing population mean for the city?

Though London is on average a young city by national standards, the fastest-growing age group in the next ten years will likely be those over 65. Unless there are major disruptions to the city's demographic trajectory, this trend also looks likely to continue far beyond that. It echoes the increase in the elderly population across the planet, which by 2050 may have almost doubled as a share of global population compared to today.

Nonetheless, this transformation of London could yield city-wide benefits – through higher levels of spending, potential increases in labour market and civic participation, and the more obvious benefits of extended lives to individuals and their families. It will also present huge opportunities for the city's businesses, investors and entrepreneurs, as well as challenges for its public services. This will likely lead to growth in health, biomedical and care services jobs across human and assisted technologies to support independence and quality of life in older age.

In housing, the challenge will be to shift attitudes in a sometimes sluggish sector. All major actors across the private, public and not-for-profit sectors need to begin planning now to meet the demand for later-life homes. Innovations in tenure, structure and support level look likely to be needed, both for newly built homes and the retrofit of our existing stock. This will need steering to some extent by the planning authorities across mainstream housing, intermediate housing, and the care home sector.

What are the ramifications of the ongoing digital revolution?

Digitally enabled services have been transforming the world of work for decades. Thanks to improvements in Internet access and the pandemic-induced mass adoption of collaborative remote working tools, digital services have become essential across most parts of the economy.

This progress in digital connectivity, together with the surge in home working during the pandemic, has cast doubt on the need for many jobs to be located in cities. Yet experience of previous waves of improved connectivity has been that, rather than supplanting the need for personal interaction, they in fact complement it. This suggests that the overall premium placed on being in the heart of a global city such as London is unlikely to change radically.¹⁵ This may be especially so for jobs that benefit from the relational aspects of a location – typically high-complexity, high-collaboration industries such as investment banking, media production and IT.

Conversely, roles that are more repetitive or process-based could see a longer-term drift away from city centres, with more near- or off-shoring. Potentially compounding these effects is the disruption that artificial intelligence (AI) may bring. AI could reconfigure workplaces, automating many routine tasks and providing new services without human equivalents. How far automation will displace current jobs depends on how quickly machine learning, AI and robotics overcome real-world challenges. Centre for London used estimates by researchers from Oxford University on the

possible impacts of automation, and found that one-third of London's jobs have a high automation potential.¹⁶ However, other research suggests rates as low as 10 to 15 per cent.¹⁷

Overall, London's job market may be relatively resilient to automation, given the city's specialisms in higher-value, relationship-rich, non-routine work. In fact, the city could be well placed to see greater rates of job creation. The higher-value services sectors that are concentrated in London are particularly good at seizing the opportunities of new technology, helping them build new offerings that entice tomorrow's consumers.

How fast will we decarbonise, and how disruptive will it be?

The transition to net zero carbon could fundamentally reshape our economy. Decarbonisation and the allied drive to promote biodiversity and restore nature could change not only our neighbourhoods, parks and public services, but also how we move around and the amenities and entertainments we enjoy. It could affect almost all the businesses and jobs in the city – turning some industries inside out, eliminating others and spawning entirely new products and services.

Quite how these convulsions translate into the jobs that Londoners do is hard to pinpoint. The UK government estimates “green jobs” will grow by 11 per cent per year to 2030 – roughly 10 times faster than the projected average for all sectors.¹⁸ But even with a wider understanding of green sectors and their employment potential, we could be underestimating how wide-ranging the impacts of decarbonisation on the economy will be. Since practically all current jobs are reliant (either directly or indirectly) on carbon-generating activities, many will change or disappear as we move towards net zero.

Will we invest more in resilience?

The pandemic has shone fresh light on our highly interconnected, globalised world. We've seen extraordinary international cooperation, but we've also seen the fragility of some parts of our economic system. In particular, some governments, firms and supply chains have faltered under the pressure of delivery in extreme conditions. This was in part due to a lack of foresight – but it was also arguably symptomatic of an outlook, across business in particular, that prized too highly the efficiency of production and supply systems. Post-pandemic anxiety may trigger a reaction to this, compounding concerns about open borders and international trade. Governments will almost certainly plan better for disease-related risks, and invest accordingly – which will have opportunity costs, i.e. less investment in other priority areas. Companies may also reorientate towards more resilient operations, leading to greater emphasis on local production, inventories and digital communications – and less tolerance for the “just in time” philosophy that dominated manufacturing and logistics thinking in recent years.

Will London be fairer?

London's trajectory on fairness in recent times has not been strong (see Chapter 1 for our definition of fairness). As we showed in our London at a Crossroads report, too many Londoners suffer unfairly in terms of basic living standards, education, discrimination, political power, and the impact of our environment. Rather than being a leveller, the pandemic struck the elderly, those with poor underlying health, those in poor housing, and Black, Asian and Minority Ethnic (BAME) Londoners harder. The Black Lives Matter movement and the global explosion of outrage at the death of George Floyd shone new light on racial injustice in the summer of 2020. Londoners were also shocked and deeply angered by the murder of Sarah Everard, and, once more, despite the pandemic, mobilised on the streets to protest at the endemic violence and harassment against women and girls.

Unfairness and inequality, seen so vividly in London, does not tend to self-correct. In the absence of serious and long-sighted countermeasures, it is more likely to deepen. This is typified by London's housing ownership and distribution, where over the last decades fewer and fewer have owned more and more. Post-pandemic London will only become fairer if the voices of the discontented, disadvantaged and discriminated-against can be amplified, heard, and channelled into meaningful improvements.

The challenges and uncertainties facing London are stark. The capital's nine million inhabitants need a better city to protect them from pitfalls and iniquities – and to help them connect with each other, as well as those far beyond the city's boundaries. Done right, their ingenuity and ideas will solve tomorrow's challenges, as well as inspiring and delighting their children and other future Londoners. In collaboration with organisations, agencies and businesses that have a substantial role in the city, we launched London Futures to help shape a vision for the capital that delivers for Londoners, for Britain, and for the world. The cornerstone of our research has been talking to Londoners about their priorities for the future. In the next chapter, we summarise what they told us.

Chapter 4: What Londoners told us

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YOUR FUTURE LONDON

Centre for London is working with the Mayor of London, London boroughs, businesses, universities, charities and Londoners to create a shared vision for London to 2050 and beyond as part of the London Futures Review.



Your
results

In this chapter, we look at what Londoners say matters to them personally, what they think matters to the city, and what their values and choices are for the future.

London is home to around nine million people: in population terms, it is bigger than many countries. The population is diverse in every sense: age, ethnicity, gender, sexuality, country of birth, ability, health, work, political views, religion... the list goes on. Asking what matters to Londoners is both an impossible question – it has nine million answers at any point in time – and a vital one.

In this chapter, we draw largely on the results of public polling carried out specifically for this project, and on feedback from our Your Future London online engagement. (See the Appendix for more information on both.) Far more data was collected than we can share in this report, and more detailed data tables are available in the report supplement. Our research was informed by a vast range of data and information from a variety of other groups and sources.

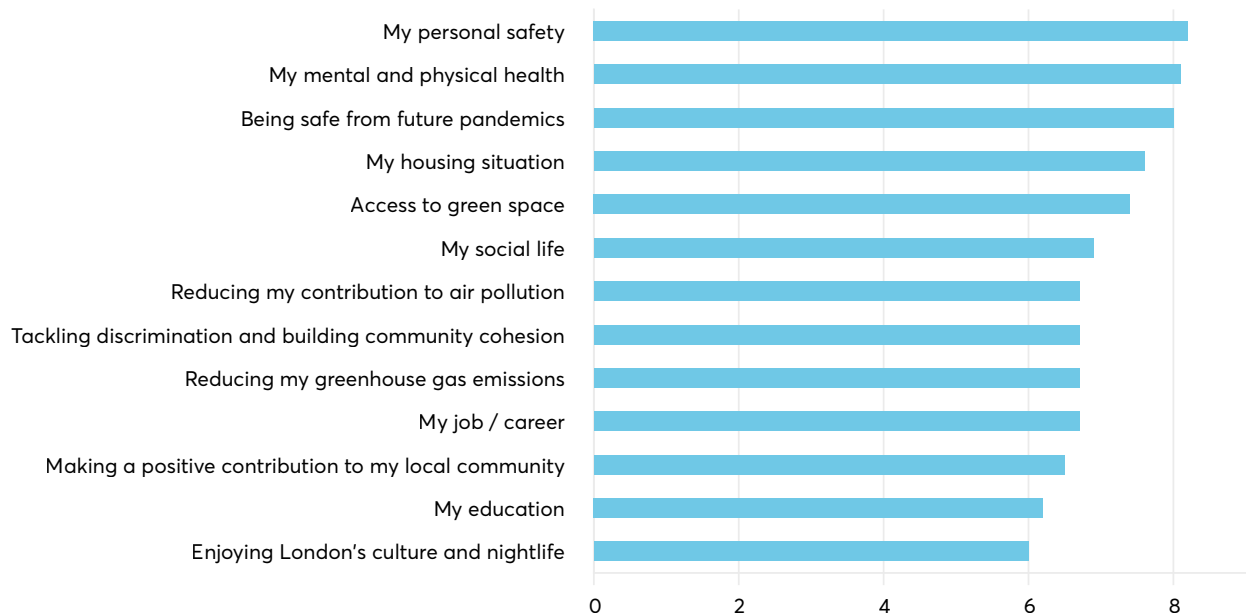
What matters to Londoners personally: safety, health and protection

We asked Londoners to tell us which issues mattered to them the most from a defined list. The issue they ranked highest overall was “my personal safety”, with an average of 8.2 on a 0 to 10 scale. Strikingly, this was the either the highest or joint-highest ranking response for men and women, White and BAME Londoners, homeowners, renters, and all age groups from 25 to 64. (For 18- to 24-year-olds, “my mental and physical health” was marginally higher, and for those 65 and over it was “protection from future pandemics”.)

Although their comparative rankings were the same, the average score given for personal safety was higher for women than for men – perhaps reflecting concerns about gender-based harassment and violence given that the poll was taken shortly after the murder of Londoner Sarah Everard. We lack time-series comparison data for this question, so it is hard to say how responses have changed, but it seems likely that the coronavirus pandemic has increased Londoners’ concerns about safety. This is reflected in the

Figure 2: Personal priorities for the future, all respondents

On a scale from 0 -10 where 0 is not at all important and 10 is very important, which of the following are the top priorities for you personally in the future?



Source: Centre for London / Savanta ComRes

vision for the city set out in the early part of this report, with its focus on protections. As individuals and as a society, we cannot function at our best when we are frightened, so helping people feel safe is at the core of what we need from our city.

For most groups, concerns about mental and physical health were equal or similar to concerns about safety. There was more variation in concern from people about their housing situation: unsurprisingly, this was higher for renters and for people whose employment status had worsened because of coronavirus. By age group, concern peaked among 35- to 44-year-olds. Other research has suggested that younger cohorts find housing the hardest to afford – but it may be that this slightly older group are more likely to be parents, and so to be concerned about both space and security of tenure for their young families.

What Londoners think is important for other Londoners: housing concerns

We next asked our respondents to rate priorities for everyone in London, from a similar list (see chart below). Once again, improving safety and security and protecting from future pandemics were near the top. Making housing more affordable was joint-second overall. Perhaps surprisingly, the average score for this issue was highest among Londoners over 65 and lowest for those under 25: despite the clichés of a gulf in understanding and concern between generations, older Londoners seem to be more concerned on average about other people’s housing than their own. When we asked people to write in their own responses to the question "What one thing would you change about London if you could?", the most frequent answers were about the amount or cost of housing. Similarly, while concern about one’s own job or career was (unsurprisingly) highest among those aged 25 to 44 and very low for people over 65, “boosting economic growth and job opportunities” for all Londoners scored highest among people over 65.

Figure 3: Priorities for the future for all Londoners, all respondents

Thinking about London’s future, on a scale from 0-10 where 0 is not at all important and 10 is very important, which of the following do you think are the top priorities for all Londoners?



Source: Centre for London / Savanta ComRes

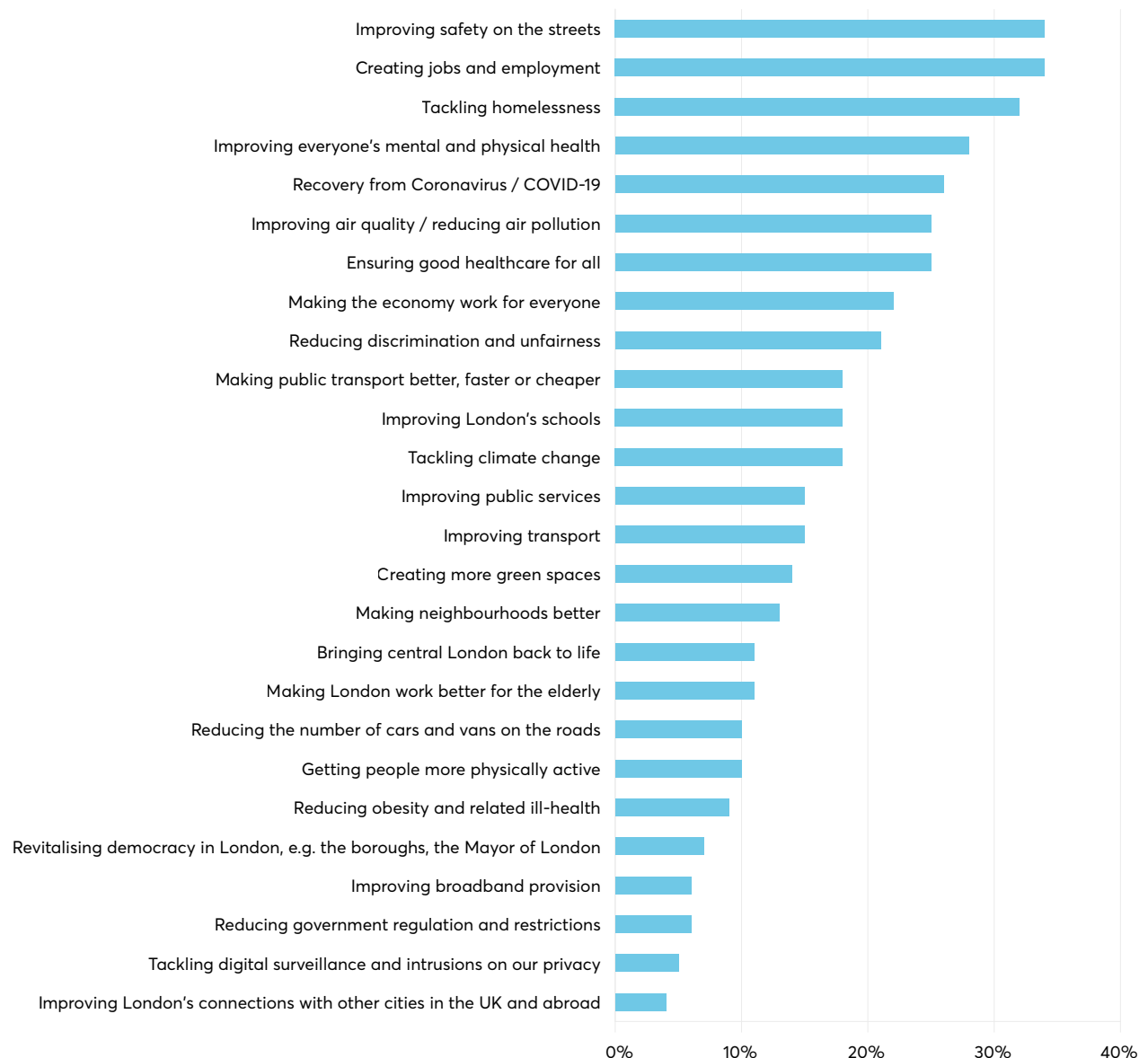
Air pollution and climate

All of our closed-response questions included options around environment and climate. In very broad terms, Londoners ranked them mid-table – neither amongst the highest, nor the lowest of priorities. It is important to note, however, that polling took place before both the recent IPCC report on climate change, and the heatwaves, fires and floods of summer 2021.

As individual priorities, “reducing my greenhouse gas emissions” was scored the same as “reducing my contribution to air pollution” (both averaged 6.7 out of 10). There was no clear pattern in responses by age, social class, or ethnicity, but women were more likely to be concerned about both issues than men. When thinking about priorities for the whole city, both issues were rated a little higher: 7.5 for air pollution and 7.2 for greenhouse gas emissions. Both of these were ranked highest by people aged 65 and over.

When we asked people to select only their top priorities for London, one quarter chose air pollution and 19 per cent chose climate change. This question also revealed some variations across different groups in the relative priority given to the two issues: men were more likely to select air quality than women, and women were more likely to select climate change than men. Similarly, those in the oldest age group were more likely to select air quality than those in the youngest age group, but less likely to select climate change. This perhaps shows the need to emphasise both topics when building public support for changes to transport and domestic heating.

Figure 4: Priorities for London for the future, frequency in top five priorities, all respondents



Source: Centre for London / Savanta ComRes

Highest priorities vary for different groups

Having asked Londoners to give overall scores for how important different issues are, we then asked them for up to five “top priorities for the capital” from a fixed list. In general, forcing respondents to prioritise in this way creates more of a difference between groups – there is a broad consensus about which issues are seen as important, but more diversity in which issues are held to be the most important, with no single topic picked by more than 34 per cent of respondents. The top three issues for the overall sample across all respondents were “creating jobs and employment”, “safety on the streets” and “tackling homelessness”, all chosen by around one-third of those we surveyed, followed by health (in various aspects), coronavirus recovery and air quality. Women were more likely to put safety in their top three (37 per cent vs 32 per cent), and men were more likely to include transport (all three transport options were chosen more often by men than by women).

On this question, there were notable differences between responses from White and BAME Londoners. (We understand that describing such a large and diverse group of Londoners as “BAME” is reductive and over-simplified, but our polling data does not allow us to make statements about individual non-White ethnic groups with any statistical confidence, so we have chosen to report this data while understanding that it is imperfect). Compared to White Londoners, BAME Londoners were more likely to put “reducing discrimination and unfairness” in their top priorities (30 per cent vs 15 per cent) and also to include “improving transport” (18 per cent vs 13 per cent). White Londoners were more likely to choose “reducing the number of cars and vans on the road” (13 per cent vs 6 per cent) and “improving safety on the streets” (37 per cent vs 30 per cent).

What matters less?

When we ask Londoners what matters more to them, we are – implicitly at least – also asking what matters less. Sometimes this is about personal circumstances: for instance, “enjoying London’s culture and nightlife” was the lowest-ranked individual priority across all groups, and lower for older Londoners than for younger ones. Looking at priorities for the city as a whole, the low rankings of some options seem to reflect respondents not seeing a particular problem. For example, the infrastructure topics of “improving broadband provision” and “London’s connections with other cities” ranked fairly low, selected as part of their top five priorities by just four and six per cent of respondents respectively.

The two options about political change in London – “reducing government regulation” and “revitalising democracy in London” – were similarly popular, chosen as part of their top five by six and seven per cent of respondents respectively. London governance is much discussed by policymakers, but it does not seem to have a great deal of salience among Londoners at the moment. Despite this overall low ranking, there were differences between the groups who selected the two governance options. Around 1 in 12 people from social grade C2 (skilled manual roles) selected the reducing regulations option, compared to around 1 in 20 from social grade AB (professional and managerial roles). People aged between 16 and 34 were around twice as likely to select the “revitalising democracy” option than people over 65.



Your Future London – a new exploration of Londoners' priorities

We also gathered feedback from Londoners using Your Future London, an experimental website developed specifically for this project. Users were presented with information about the city and asked to choose between about pairs of future options for the city, for example eliminating homelessness in London, or lower taxes for Londoners. Around 1200 people used the website, but because it was promoted by Centre for London and our partners rather than sent to a pre-defined sample, the results are not necessarily representative of London's population as a whole. Broadly, users of the tool were more likely to be female, more likely to live in inner London, and younger than the adult London population as a whole. More information is available in the Appendix, or you can visit it online at futures.centreforlondon.org.

The results for all users are shown below, with larger squares indicating stronger preferences. “Homelessness eliminated” was the most preferred option, followed by “more affordable homes”; cleaner air and reduced racism and discrimination were also seen as important.

While statements about health and personal safety scored fairly highly, they ranked a little lower than in the polling results. This may reflect three differences. First, the timing of the work. Your Future London ran over winter and spring 2021, finishing before the poll was in the field. Second, the profile of the respondents. And third, the nature of the engagement: users were invited to view information about the challenges facing London before they took part, which may have shifted their focus from issues that currently affect them to ones that do not.

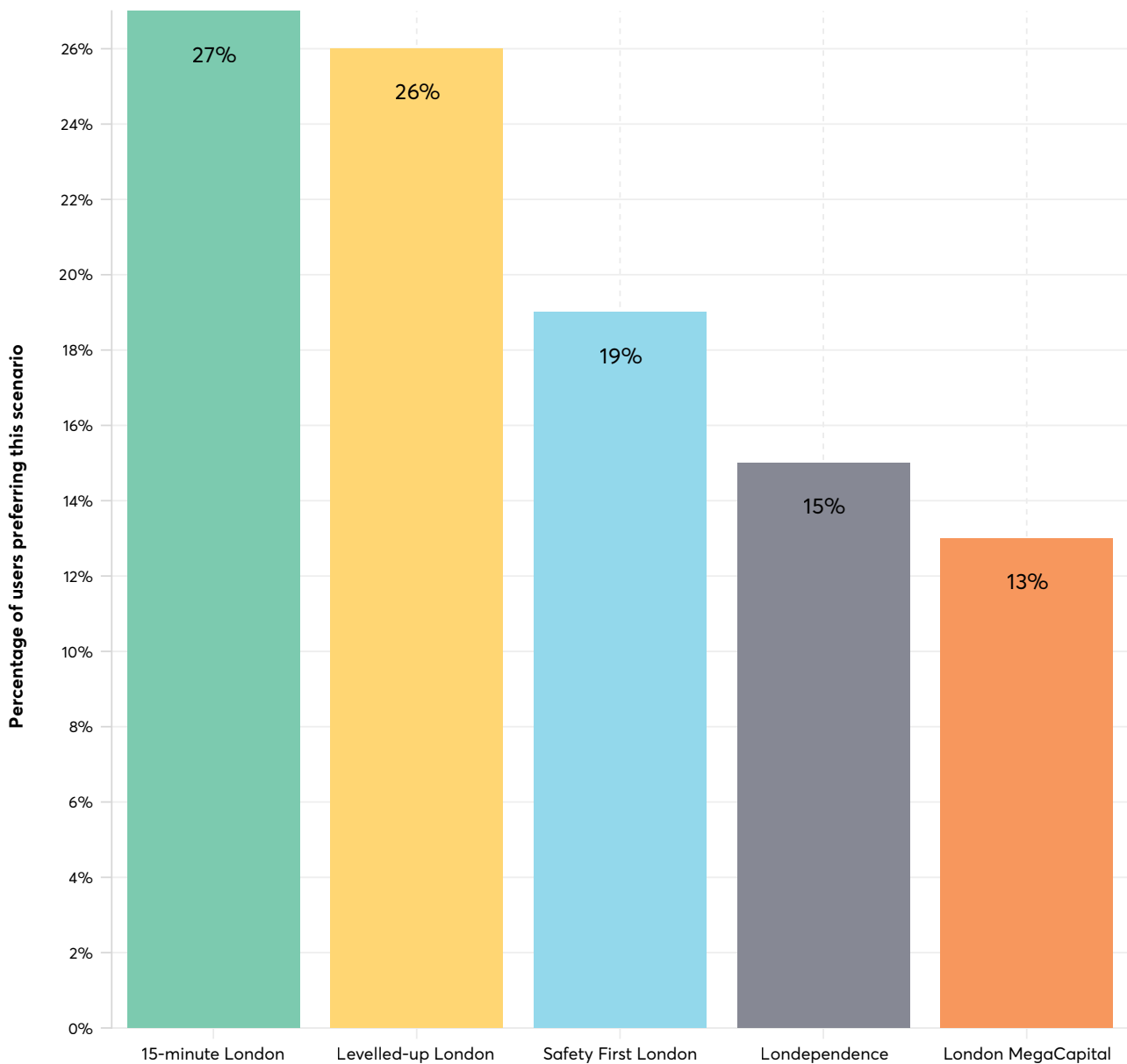
Figure 5: Your Future London – preferences for the future (larger boxes are the most preferred)

Homelessness eliminated	More affordable homes	Cleaner air and fewer deaths from pollution	Racism and discrimination reduced	London's streets become noticeably safer for all			
Carbon emissions from heating London's buildings significantly reduced	All public transport made accessible for people with disabilities	Free care for the elderly and vulnerable	More cycle lanes and pedestrian zones	More trees and local artwork on high streets			
				NHS waiting times eliminated	Some central London offices converted into affordable homes	A new London minimum wage is set by the Mayor	Neighbourhoods have budgets for good ideas
More community spaces for the arts, sport, and wellbeing	Vehicles in London become electric as soon as possible	Healthy food subsidised for all	London's boroughs have more power and money	Less police "stop and search"	Free fitness programmes for all		
More parks and green spaces					Higher wages for most people	Increased protection against future epidemics	Every town centre has an Underground station
More ethnic minorities and women in positions of power	Free public transport for all	London's businesses lead the world in innovative products and services	Votes for 16- and 17-year-olds	Lower taxes for Londoners	New tourist attractions developed	Free security systems for all homes	
			Crossrail 2 is given the go-ahead	Fewer council restrictions on building, adapting and extending homes	More and cheaper international flights	Some parts of the Greater London boundary expanded beyond M25	Crime reduced by police monitoring mobile phones

Source: Centre for London

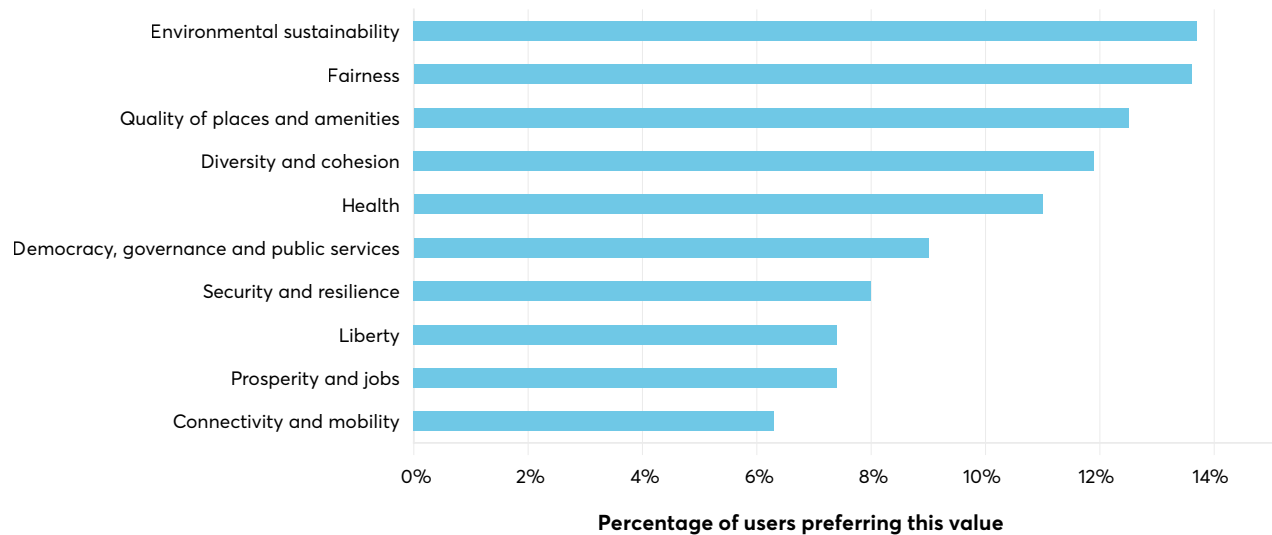
We linked the statements in Your Future London to the future scenarios we developed in London at a Crossroads – which in turn were built from pairs of values in our initial framework for the project. This allowed us to compare broader expressions of values and possible futures for our city. When we broke them down in this way, the strongest values expressed through people’s preferences were environmental sustainability and fairness, followed by quality of places and amenities. These related most closely to the “Levelled-up London” and “15-minute London” scenarios, although there was some support for all five scenarios we developed.

Figure 6: Your Future London – revealed scenario preferences



Source: Centre for London

Figure 7: Your Future London – preferred values



Source: Centre for London

Chapter 5: Conclusion and next steps



Despite recent headwinds, London is still a great city. It is a home, a haven, a playground, a capital, and a place of learning, industry and work for millions. Recent events have led some to doubt the brightness of its future. COVID-19 killed thousands, brought the city to a standstill and triggered a revolution in home working. Fear of disease also cast a wider pall on the cheek-by-jowl nature of city life.

Our London Futures work has allowed us to reflect on all dimensions of London's life – its present, its past, its role in the UK and the world, and its many possible futures. We have found much cause for optimism. London is amongst the best places in the world to find many of the things we value most – especially connection, friendship, commerce, ideas, community, family, and safety. But too often the story told about London's place in the UK is a negative one – despite its extraordinary economic and cultural contribution, and the widespread levels of disadvantage and deprivation that Londoners suffer.

In this report we have laid some of the foundations of a winning argument for London's place in the nation's priorities. London can be a showcase for the best of urban life, especially as the world looks set to continue to urbanise at pace. But there are significant challenges in making London work better for all. We set out 10 priorities for making London greater, growing the city's dynamism, boosting its capacity to connect us, increasing the protective safety net for all, and helping solve our multiple environmental crises.

We hope our vision for a greater London can help rally Londoners and make the case for improvement – citywide, locally and nationally. We at Centre for London look forward to working with advocates and other partners to press this case as it shapes our forward programme of research, ideas and events. Our next major project will focus on many of the challenges discussed here under the rubric of “levelling up” – addressing London's place in the debate and the many areas within London that need levelling up too.

London is a city that is – to borrow from American poet Amanda Gorman – far from broken, but rather merely unfinished. It's ours to improve: its benefits can be spread far more widely, and its potential positive impact is almost boundless.

We all need a greater London.

Appendix:

London Futures methodology

This report and its recommendations are based on engagement with London's people, politicians and policymakers throughout the latter part of 2020 and the first half of 2021.

As part of this research, we used a mixed-methods approach to access different types of information from a diverse range of Londoners. We also drew on our learning from Centre for London's wider programme of work between 2011 and 2021.

For this report, we:

- Commissioned a poll of 1,004 Londoners from Savanta ComRes. Fieldwork was conducted from 6-13 May 2021. Results were weighted to be representative of London's population.
- Created an online engagement platform, Your Future London, which invited people to weigh up different scenarios for the future of their city. We promoted the platform ourselves and also asked people in our network to promote it. The platform was active in the first half of 2021 and received over 1,000 responses. Half of respondents identified as female and one-third as BAME. Around one in seven were under 25 and a further three in seven were aged 25 to 34. Users were more likely to come from inner London than outer London: the top five boroughs were Lambeth, Hackney, Islington, Southwark and Wandsworth. This is likely to reflect the places in which we were most successful in promoting the platform.
- Held five roundtables with experts, academics and policymakers on health, housing, equality and fairness, power and democracy, and London's place in the world. All roundtables took place online in early 2021 and were held under the Chatham House rule.
- Created an offline engagement pack for people to use, with responses fed back through an online form. This was not used as much as expected due to the COVID-19 lockdown in early 2021.

Endnotes

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We have ideas with impact.

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Despite recent headwinds, London is still a great city. It is a home, a haven, a playground, a capital, and a place of learning, industry and work for millions. Yet the city remains at a crossroads, its future uncertain. Too often the story told about London's place in the UK is a negative one despite its extraordinary economic and cultural contribution, and the widespread levels of disadvantage and deprivation that Londoners suffer.

The case for London in the nation's priorities needs to be remade. And there are significant challenges in making London work better for all. We set out 10 priorities for making London greater, growing the city's dynamism, boosting its capacity to connect us, increasing the protective safety net for all, and helping solve our multiple environmental crises.

This report is the culmination of the London Futures review. We have reflected on all dimensions of London's life – its present, its past, its role in the UK and the world, and its many possible futures. Throughout we have listened to the views and priorities of Londoners. We conclude this work with our vision for a greater London.

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