

CENTRE FOR LONDON

London Futures

#LDNFutures

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London Futures

Overview

London at a crossroads

Part 1: London today

Part 2: London futures

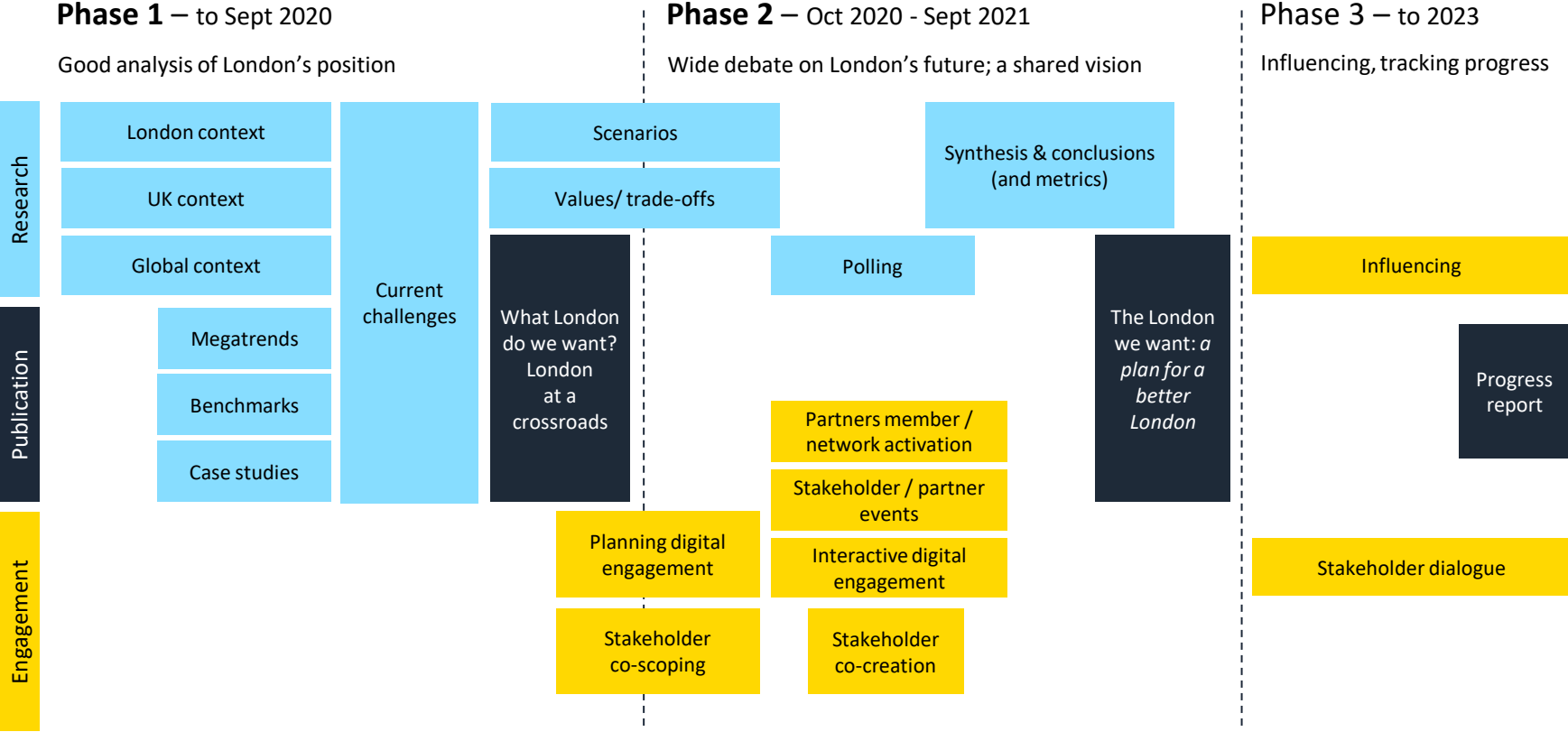
What next, and how to get involved

London as global city

- Why now?
- *London: World City* changed the story
- Transition to high value services
- Highly open, international, cultural offer
- Economic growth, and jobs
- Regeneration, institutions and Olympics
- But: housing crisis, poverty, inequality, climate change, protectionism, and COVID-19
- Time to take stock



London Futures




What makes a good city?

Democracy, governance and public services	Security and resilience
Liberty	Diversity and cohesion
Health	Prosperity and jobs
Environmental sustainability	Quality of place and amenities
Connectivity and mobility	Fairness

slido

What makes a good city?

 Start presenting to display the poll results on this slide.

London today



© Edward Howell

- London's people
- London's economy and businesses
- London's places and environment
- London's institutions
- London and the UK
- London and the World

London's people

After decades of decline, London's population has grown sharply since the early 1990s. It may grow by two million by 2050.

What went well

London has successfully absorbed this growth, becoming much more diverse, high social cohesion.

What went less well

Inequalities in wealth, income, education, employment, safety and health, fuelled by racism. More Londoners living in poverty than in any other part of the UK.

London's economy and businesses

Home to 14 per cent of the UK's population, London now accounts for 24 per cent of its economic output.

What went well

Economy has boomed. Employment has grown.
A global hub for professional services, creative industries, education and HQs.

What went less well

Productivity growth has stalled.
Wages are low for many.

London's institutions

London returned to metropolitan governance in 2000 with its own Mayor and Assembly.

What went well

The mayoralty has been seen as a success, innovating in transport, winning and delivering the 2012 Olympics, and gaining more powers over planning and housing.

What went less well

Devolution to the capital has stalled. Concerns about the longer term implications of clashes over policies.

London and the UK

As the UK's only global city, London's profile and its growth are sometimes seen as a problematic part of the UK's regional imbalances.

What went well

London's success has helped to fund the rest of the UK, and has acted as a magnet for international investment as well as tourism.

What went less well

London's economic, political and cultural dominance has a cost, growing dissatisfaction with the city and perceptions of London-centrism.

London and the world

London is still widely rated the world number one city but this status is at risk.

What went well

London has been open to talent, attractive to investors, improved its infrastructure offer and been able to wield its soft power across the globe.

What went less well

The competition from other global cities is growing. London has not been able to keep up on affordability, safety, and congestion.

London and the world

Perception and reputation of major cities among global audiences (visitors, investors, citizens, etc.)

Jan 2013 – June 2016


Rank	City	ELO Algorithm Score (max = +1; min = -1)
1	Sydney	0.84
2	Vienna	0.75
3	Venice	0.63
4	Stockholm	0.54
5	London	0.54
6=	Edinburgh	0.45
6=	Copenhagen	0.45
6=	Vancouver	0.45
9	Geneva	0.35
10	Munich	0.35
11=	Barcelona	0.26
11=	Melbourne	0.26
13	Zurich	0.21
14	Montreal	0.03
15	Paris	0.02
16	Helsinki	0.01
17	Toronto	-0.02
18	Amsterdam	-0.05
19	Rome	-0.19
20	New York	-0.30
21	Dublin	-0.34
22	Frankfurt	-0.39
23	Prague	-0.40
24	Tokyo	-0.42
25	Madrid	-0.45
26	Berlin	-0.47
27	San Francisco	-0.57
28	Milan	-0.85
29	Los Angeles	-0.86
30	Singapore	-0.87



June 2016 - present

Rank	City	ELO Algorithm Score (max = +1; min = -1)
1	Vienna	0.65
2	Sydney	0.61
3	Stockholm	0.51
4	Copenhagen	0.45
5	Vancouver	0.45
6=	Melbourne	0.41
6=	Toronto	0.33
6=	Montreal	0.32
9	Tokyo	0.23
10	Rome	0.19
11=	Zurich	0.19
11=	Barcelona	0.18
13	Venice	0.17
14	London	0.16
15	Edinburgh	0.10
16	Helsinki	-0.02
17	Geneva	-0.07
18	Madrid	-0.09
19	Amsterdam	-0.10
20	New York	-0.14
21	Munich	-0.18
22	Milan	-0.23
23	Paris	-0.28
24	Frankfurt	-0.39
25	Dublin	-0.40
26	San Francisco	-0.41
27	Los Angeles	-0.58
28	Berlin	-0.60
29	Singapore	-0.62
30	Prague	-0.76

Six global forces



Recovery from
coronavirus

Climate change
goals

Disruptive
technologies
and services

Rise of
nationalism and
populism

Continued rise
of the Asian
economies

Ageing global
population

Which is the biggest challenge facing London?

Recovery from
coronavirus


Climate
change goals

Disruptive
technologies
and services

Rise of
nationalism
and populism

Continued rise
of the Asian
economies

Ageing global
population

 Start presenting to display the poll results on this slide.

What other global forces or trends will shape London's future?

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What other global forces or trends will shape
London's future?

 Start presenting to display the poll results on this slide.

Case studies



Tokyo
Medellín
Barcelona
Wales
Paris



Key challenges for London

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

Scenarios



Scenario:

Narrative



Totemic project

Key changes

Impact

Net-zero by...

Population in 2050...



Scenario: 15 minute London

Spurred by the home-working revolution of 2020, with its widespread revival of local shops, and the climate emergency, London's leaders back neighbourhoods and low-carbon living as the centrepiece of a green recovery. They commit to delivering net-zero greenhouse gas emissions a full 20 years ahead of national targets and plan accordingly.

Bold targets are set for eliminating fossil fuels from London. The expected backlash fails to fully materialise as Londoners accept that the era of the combustion engine and the gas boiler is rapidly coming to an end. Energy efficiency measures are widely adopted too. Businesses and supply chains accelerate towards low-carbon alternatives. Air travel never recovers fully.

Londoners give up their cars in droves, especially in inner London, as a London wide road user charging scheme bites. They instead switch to the rehabilitated public transport network, bikes, e-bikes and a new generation of small, electric vehicles.

Central London office life never returns to pre-coronavirus levels, and instead repopulates with residents. Across London, local groups increasingly take charge of housing homeless people, primary education, social care, and some aspects of healthcare.



Totemic project

Some airport capacity converted to solar energy farm

Net-zero by...

2030

Population in 2050...

9 million

Key changes

Burning fossil fuels banned by 2030

Car use restricted in inner London

Road user charging expanded

Community organisations coalesce into "parish" bodies, gaining power over planning, schools

Impact

Local amenities flourish

Petrol/diesel cars and gas boilers eradicated

Central business, shopping and entertainment district shrinks

Traffic lower on main roads; journeys shorter, but more frequent

Much less air travel and international trade



Scenario: Safety First London

The “Great Pause” of 2020 and the subsequent recession leads to a new era of civic caution. Investment is switched towards public health, security and adapting to the warming climate. Epidemic control measures piloted during the first wave of COVID-19 develop into new and permanent features of city life. More is spent on ensuring a resilient economy and society. Security of food, medical supplies and biosecurity become paramount, alongside the control of citizens’ movements and the monitoring of their health using new technologies. New “what-if” planning trumps efficiencies across the private and public sector. Economic output drops overall, but citizens’ fears about new shocks are managed down successfully. London’s flood defences and a new fund for cooling the city during heat spikes are the most popular policies of the 2032 mayoral election. A new ‘moonshot’ target to eradicate childhood obesity catches the imagination and shapes education, food policy and street design. Work starts on Thames Barrier II.



Totemic project

Thames Barrier II

Net-zero by...

2050

Population in 2050...

9 million

Key changes

Security, health and resilience prioritised

Primary healthcare and social care expanded

Data-led policing and city management

Mandatory citizen health monitoring

Epidemic control measures

Adaptation for warm

Impact

Limited aviation recovery

Health improvements including dramatic drops in childhood obesity

Future shocks mitigated

Loss of privacy and liberty



Scenario: 15 minute London

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Scenario: Londependence

Centuries of centralisation in UK government are reversed when a new cross-party consensus delivers unprecedented new powers to London as part of a new constitutional settlement. A new federal district helps to delineate national and London government more clearly. New tax powers are given to the GLA, as well as new responsibilities for health, housing, social care and even welfare. Boroughs flourish too as powers and revenue cascade down. A new Citizens' Assembly is established that advises and complements the formal London government bodies. Some government departments and functions exit the capital. Over time, new policies for London are trialled, tackling homelessness, housing affordability, inequality and competitiveness (including a fast-track London visa scheme for EU nationals). London takes full control on planning matters and fast-tracks new rules to allow development of new homes to London-specific standards.



Totemic project

London visa scheme

Net-zero by...

2045

Population in 2050...

10 million

Key changes

London acquires major new powers to govern itself

Some national government functions leave
Could be part of federalised UK

London government grows as national agencies are devolved e.g. NHS, welfare
London Citizens' Assembly

New London planning regime to deliver more London-appropriate homes

Impact

City Hall expanded

Whitehall federal district/repurposed

Increasingly tailored solutions to longstanding issues, e.g. homelessness, migration

More London-specific taxes

More affordable "London Standard" homes built



Scenario: London MegaCapital

The “levelling up” agenda falls away and a new, muscular pro-London attitude emerges, driven by the need to raise tax revenues given the post-coronavirus fiscal strain. London reasserts its dominant position in the UK. Economic growth is pursued above other goals, with priority given to global connectivity. Air travel, despite carbon goals, is prioritised in the recovery. Business influence in running the capital’s affairs grows, and new investments to foster innovation have some success. London’s global business sectors build back strongly from the 2020 low point. “Brand London” is re-embraced as a core part of the post-EU “Global Britain” push for increased trade and tourism. London’s startup scene also rebounds and becomes worldleading. Eventually Greater London’s boundaries expand, taking in much of the remaining M25 territory. But some devolution is reversed: national government takes direct control of some areas and pushes the pace on housing development and other significant growth projects. Crossrail 2 is given the go-ahead to relieve congestion and overcrowding.



Totemic project

London boundary expands, absorbing Epsom, Watford, Loughton and Dartford

Net-zero by...

2075

Population in 2050...

15 million

Key changes

Maximising London’s economic growth London’s direct sphere of influence and power grows to wider south east

Greater London boundary expands

Capital retains and expands national and international power

Pro-business deregulation

Directed public investment stimulates innovation

Impact

Incomes rise

More concentration of economic activity in London

Pressure on transport network

Some devolution reversed

Crossrail 2 goes ahead



Scenario: Levelled Up London

The deep impacts of COVID-19 on London's most vulnerable citizens breed a new movement for a fairer capital. In 2023 London's Mayor, the boroughs and national government agree a new plan to make London fairer. New investments to protect London's most fragile people take shape. New laws create greater powers to requisition empty homes in order to house the most disadvantaged. Street homelessness is eliminated. A London Minimum Wage is launched. Public transport is made free to all, and radical schemes to address age-old inequalities are piloted, with the most successful scaled up. Parents, minorities, and the lower-skilled benefit. But new restrictions are placed on immigration into London, and business leaders' warnings of an exodus of commercial capital and talent go unheeded. Population growth reverses, and the economic output per capita grows only slowly. Nevertheless, Londoners become more equal in terms of income, wealth, rights and opportunities, and relative poverty drops abruptly, which is reflected in a new civic ethos across social groups.



Totemic project

Free public transport

Net-zero by...

2055

Population in 2050...

8 million

Key changes

Equality first

Radical redistribution of wealth

Empty homes requisitioned

Income equalisation measures (e.g. London Minimum Wage, salary caps)

Public services improved and free to all

Public spaces opened up more and used by all

Impact

Poverty reduced

Inequalities between groups reduced

Social mobility enhanced

Street homelessness eradicated


Business threatens exodus

Population growth reverses



Which scenario for London's future do you prefer?



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What should the vision for London in 2050 be
(or include)?

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Get involved



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