



the
london
collaborative

The Collaborative City
Future Scenarios

The Collaborative City – Future Scenarios

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Introduction

The future of a city as complex and unpredictable as London is inherently unknowable. But as with other complex topics, **scenarios** can provide a helpful way of thinking about different possible futures and deciding the best way to prepare.

This report, which accompanies the main London Collaborative report *The Collaborative City*, includes the six scenarios developed as part of the early London Collaborative work, along with an account of the process by which the scenarios were developed, and an indication of how they can be used.

The scenarios included in this report are not ends in themselves, but tools to surface key strategic challenges, choices, tensions and trade-offs. They have been tested already by public sector leaders in a series of workshops, and refined in light of feedback.

This report should be read alongside the *Future trends evidence review* report, which offers an analysis of more than 50 studies about the future of London, an evidence base that provided a vital underpinning for the scenarios.

What do the scenarios cover?

We have developed six alternative scenarios of the future of London in 2023. Each scenario offers a chronology, indicating the 'steps along the way' to this possible future situation. All of the scenarios then cover, to varying degrees, the following aspects of future London:

1. Demographic change
2. Economy and skills
3. Housing and infrastructure
4. Climate change and the environment
5. Technological innovation
6. Lifestyles and behaviours
7. Social cohesion/discord
8. Health and wellbeing

None of the scenarios are intended to **predict** the future of London: the chances of the capital actually looking, feeling or working like the 2023 as described in any one of the scenarios are virtually non-existent. But with this said, the events described in some of the scenarios are more likely to occur than others, given current data and assumptions.

The three core scenarios – i.e. the three with the highest likelihood within the 15 year timeframe – are described below, along with an overview of the main challenges and issues they raise for public services,

Scenario 1: Full Speed Ahead – Super Global City

In this scenario London is characterised by high population growth, a prevailing social attitude of ‘tolerant co-existence’ and a very strong economy (i.e. one with growth in output and employment exceeding the most optimistic of current predictions). Significant and continuing investment in London’s transport infrastructure enables continuing population and workforce mobility. There is a mature, well-established market for public service provision, in which private and third sector providers are major players.

Challenges, issues and opportunities:

- ✦ What should the role of the public sector be in a private sector-dominated future?
- ✦ How to cope with an extremely mobile and changing population.
- ✦ The issues (e.g. governance) posed by a ‘London plus hinterland’ scenario.

Scenario 2: Hitting the Buffers – London Falling Apart

This scenario explores the impact on London of increasing out migration but steady population growth due to a higher than expected birth rate, and a prolonged recession. These trends combine with others to create a prevailing social climate of fear, suspicion and competition between communities. The capital has long been overtaken by international competitors and is no longer the destination of choice for economic migrants, let alone tourists. The poorest people live increasingly beyond the margins of formal society: in health and housing conditions that seem to belong in a past century.

Challenges, issues and opportunities:

- ✦ Preventing ‘brain drain’ and major skills shortages in the event of recession.
- ✦ Dealing with chronic health, employment and crime problems.
- ✦ How to respond to severe community tensions, including the rise of the far right.

Scenario 3: Steady Ahead – Growing Outwards, Growing Greener

In this scenario London is characterised by population growth in the middle band of current predictions, a prevailing social attitude of ‘tolerant co-existence’ and medium economic growth (i.e. with growth in output and employment in line with current long-term predictions). The last fifteen years have seen a shift of people, money and power from the centre to the suburbs, and from there onwards down to local wards and communities. Whilst this has had many positive benefits, London as a whole is something of a patchwork, and standards vary considerably.

Sustainability and the environment have continued their steady rise up the political and personal agendas.

Challenges, issues and opportunities:

- ✦ Balancing community-led decision-making with maintaining standards.
- ✦ The impact of a major increase in home working.
- ✦ What part public services should play in facilitating environmental change.

The other three scenarios, which are arguably less likely but are still worthy of careful consideration because of the type of opportunities or challenges they pose, are:

Scenario 4: Knocked Off Course? – Shocks to the System

In this vision of 2023 London is recovering from a number of disasters over the past three years including a year of sustained flooding that left infrastructure ruined and affected the lives of thousands of Londoners. In spite of this, London is a much more cohesive city than in previous decades, and a major public reconstruction programme has helped the capital avoid a prolonged recession. Conditions in some areas remain extremely poor, with major health and crime problems, however.

Challenges, issues and opportunities:

- ✦ How to plan for the ‘post disaster’ phase of reconstruction.
- ✦ Providing long-term for the most severely hit communities.

Scenario 5: Off the Rails – Divided City

London in this scenario is characterised by population and economic growth in the middle band of current predictions, but is suffering from a prevailing social attitude of ‘segregation, fear and suspicion’ caused by global instability and sustained terrorist threat.

Challenges, issues and opportunities:

- ✦ How to respond to globally-driven trends, e.g. in community relations.
- ✦ Potential of housing policy to ameliorate spatial segregation.

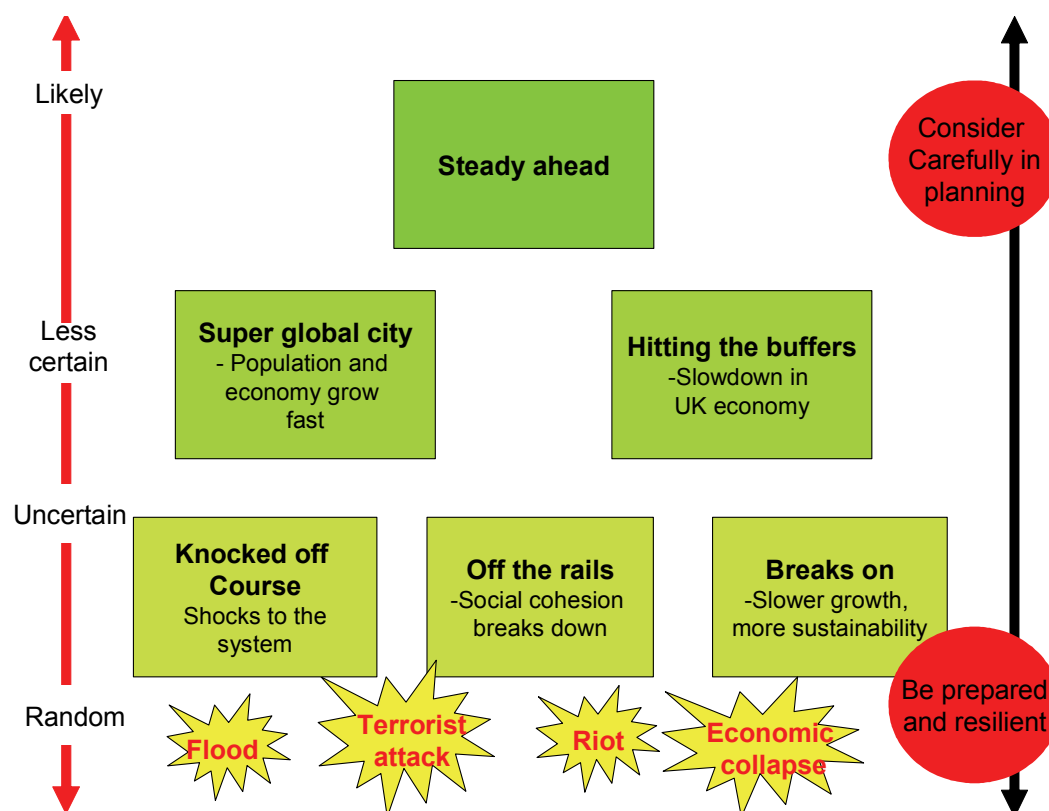
Scenario 6: Brakes On – London in the Slow Lane

This scenario is characterised by a shrinking population and prolonged recession, but generally strong ties between different communities and good levels of cohesiveness. London is no longer the magnet it once was for corporate investors, so the public sector and community activism have stepped in to fill the gap.

Challenges, issues and opportunities:

- ✦ Dealing with the unexpected, in particular a shrinking population.
- ✦ Responding to the private sector ‘quitting the city’.

The diagram below conveys how the scenarios sit in relation to each other, in terms of their **overall likelihood** in the timeframe we are considering (the next 15 years).



How were the scenarios developed?

These scenarios were developed on the basis of secondary rather than new primary research. This took the form of an extensive review of existing evidence and analysis about the future of London, the findings of which are captured in the separately published *Future trends evidence review* report.

This review provided us with the scenario **content**, and in particular a sound understanding of the range of possible futures. The content of all of the scenarios taken together is represented by the list of eight factors outlined earlier.

The next step was to define the scenario **parameters**: the factors that would frame or 'drive' each of the images of the future. Clear parameters are important in order to give each scenario a strong rationale and narrative thread.

Three factors provide our scenario parameters:

1. Rate of population growth
2. State of the economy
3. Strength of ties between communities

These factors were chosen over others because they were felt to be areas of **high impact**, but also fundamental uncertainty. One of the key messages from our expert workshop was that despite the air of predictability provided by population or economic projections, trends in these areas can change rapidly and with far-reaching consequences. And our review of evidence suggested that societal attitudes and community cohesion were particularly hard to predict, but of fundamental importance.

Our scenario parameters were also chosen because they are comparatively **independent** as variables: outside of the control of any one organisation (including any one public body) or individual, and a powerful driver of change in other areas. We used different configurations of each of the three factors to frame each of the scenarios, and the first paragraph of each of the scenarios describes this starting point.

Other factors considered and discounted included climate change, which whilst clearly important for the future of London was felt to be too certain but also likely to be directly experienced to only a small extent in the 15 year timeframe; and governance/the role of the state, which is included as the 'lens' through which all other factors are refracted in the scenarios.

Drafts of the core scenarios were then tested by participants in four 'shared interest workshops' held during February 2008. Workshop participants, including members of our Leadership Network along with academics and leading policy makers, were asked to consider both the opportunities and challenges the scenarios posed for their organisation and how the scenario they were asked to focus on might be made more coherent, consistent and useful.

Feedback from workshop discussions was used to make substantial amendments to the scenarios and has helped us to develop the versions presented herein.

How can the scenarios be used?

The scenarios will have a wide range of potential applications, including, but not limited to:

- ✦ using the scenarios as the basis for a whole system **simulation**, wherein participants take on a 'role' in the future as outlined in one or more of the scenarios, and use this exercise to test out organisational and policy responses;
- ✦ disaggregating the scenarios and 'rebuilding' a preferred, or **normative** scenario, based on current preference sets;
- ✦ taking these scenarios as 'global' versions of the future and doing further research and analysis to create **more detailed scenarios** for a particular sector, industry or organisation – situated within the global framework;

- ✦ using the scenarios to test out the strengths and weaknesses of a particular **policy** programme or course of action, using the opportunities and challenges presented by the scenarios;
- ✦ working across the scenarios, perhaps in a workshop setting, to define the **robust** actions for today – i.e. those that ‘hold’ across all of the scenarios.

The remainder of this report is made up by the six scenarios themselves.

1. Full Speed Ahead: Super Global City

In this scenario London is characterised by **high population growth**, a prevailing social attitude of **'tolerant co-existence'** and a **very strong economy** (i.e. growth in output and employment exceed the most optimistic of current predictions).

It's 2023 and London is booming. As young, dynamic, creative city, twenty-somethings from across the world are heading for London as better off families and older Londoners increasingly choose to move out to the Home Counties.

London's workforce is colonising the South East as never before, confirming it as the mega-city that it has long promised to become. This has been enabled above all by the huge improvements in public transport infrastructure, driven by a strong regional assembly which increasingly leaves borough councils in the shade.

Within the boundaries of Greater London itself, population growth is higher than predictions at the start of the century suggested, but the economy is strong and there is a climate of tolerance towards new immigrants both from Eastern Europe and developing nations, even though genuine *integration* is less evident.

Transport aside, the public sector has found it hard to keep pace with the growth of business, however, and this fast-moving, high churn population are mostly happy for the private and third sectors to provide more of those services traditionally offered by the state.

Chronology

All of the scenarios offer an image of London in 2023. The following are some of the **key points** in the development of this particular 'trajectory' of the future – what happened between now (2008) and 'then' (2023) to bring this scenario into being.

- ✦ **2013:** London's employment rate tops 72 per cent, and predictions are that it will continue to rise.
- ✦ **2015:** A report from the governments' unified regulatory body highlights the real and growing problems of public spending failing to keep pace with the growth in the economy of London. Transport is the only public service which has kept pace with growth, and in others a crisis is predicted annually.
- ✦ **2018:** Crossrail opens, a little later than planned, and is an immediate success with the public. East London has already benefited hugely from the prospect of its arrival with companies keen to set up along the route.
- ✦ **2021:** A government report suggests that 1 million overseas migrants have arrived in the UK during the past 5 years. Many live in London, whose population now stands at 8.9 million, up from 7.3 million at the turn of the century and above the estimates being made twenty years ago.

Population, immigration and demographic change

Migration, both from within the UK and overseas, has led Greater London's population to increase to 8.9 million – beyond the predictions being made a decade ago. Eastern Europeans from EU member states (including Turkey) account for much of the in-migration to London, along with Africans and South Americans. London's prosperity means that most are quickly absorbed into the jobs market and experience a **high degree of tolerance** from their fellow Londoners. New overseas arrivals tend to congregate with their countrymen in various parts of London, but property prices and the successful push for new mixed tenure housing across the city (driven by a strong London assembly) have reduced the risk of increased spatial segregation between different ethnic and even socio-economic groups. As a result, **spatial integration is high**. And yet, except for in the poorest (usually immigrant) communities, social bonds between neighbours tend to be relatively weak.

Size and ethnic diversity are not the only notable features of London's population in 2023 – its **rapidly shifting age profile** is also striking. Like all Western nations, the UK population is ageing, yet in London it is **ageing at a much slower rate** than in the rest of the UK, thanks to its popularity amongst the young (both high earning international graduates and lower skilled migrants). Families, middle aged people and the retired are increasingly opting to move out of Greater London and dispersing to other parts of the South East – what journalists call '**the middle aged spread**'. It is true that the proportion of London residents aged over sixty has grown since the start of the century, but only by around 3 per cent rather than the 5 per cent predicted, and in stark contrast to the 14 per cent rise experienced nationally. What's more, these figures mask **growing age polarisation**. Inner-London boroughs are, on the whole, getting younger whilst outer London boroughs get older. Those elderly people remaining in inner-London are increasingly concentrated at the poorer end of the spectrum and tend to live in rented accommodation – one of the few lifestyle traits they share with their young neighbours.

The flight of older Londoners and the influx of the young, along with continued migration, mean that London is **a city of high human churn**. This inevitably **undermines continuity** within local communities, and fewer people than ever claim to know their neighbours or feel any real attachment to where they live. As the extended families disperse and as the middle aged leave, so London's neighbourhoods lose the very people who typically maintained the community groups, clubs and societies that formed their 'social glue'. For people who feel they are 'doing well' in a prosperous, tolerant city, this rarely seems to matter, but some fear its storing up social problems for the future.

Economy, skills and consumerism

With an economy that was struggling in the nineties, thriving in the noughties and buzzing in the teenies, London in 2023 is **a city of constant reinvention** that has

resisted the temptation to rest on its laurels and is, some say, as exciting as the new global cities of Mumbai and Beijing. The backing of successive mayors for a quest for global dominance is symbolised by the new iconic office buildings that have sprung up in Docklands, the City and parts of East London. A **continual flow of migrants** ensures that skills gaps are being met. What's more, higher standards in education and **innovative partnerships between business and colleges** – particularly since the raising of the school leaving age in 2013 – are seeing greater opportunities for London's home grown youngsters to share in the capital's success. Since 2005, **UK growth has averaged over 3 per cent a year**, and it is London that has driven much of that success. It continues to be the most popular destination for graduates in a number of fields, from inside and outside the UK, and around 800,000 new jobs have been created in London since 2002.

The conspicuous success of the financial sector in the first decade of the century has been maintained, with three quarters of new London jobs since 2005 having been created in this sector. New media has also become an established specialism, and London remains a world leader in music and the arts. In this environment of creativity, 'high culture' thrives, but for most in London it is straight forward **consumerism** that fuels the city's economic and cultural life. As the high street continues to compete with internet shopping, the big London stores have introduced a range of interactive games, activities and even theme park-style rides to take the shopping experience to another level.

The high demand for commercial property in London has been a big incentive to businesses enabling **home-working**, and most large and medium sized companies, along with public bodies, have been able to reduce their office space as a result. It is estimated that 85 per cent of London's workers now spend at least some of their contracted hours of employment working beyond the office. **Central London nonetheless exerts a pull** – commercially and culturally – that the outer boroughs and suburbs find it difficult to compete with. The **excellent transport links** that carry far-flung Londoners to work each day also enable them to remain there until the early hours, whilst their own local bars, restaurants and leisure centres rarely enjoy their patronage. Thus new leisure industries thrive above all in the heart of the city, and young people in particular tend to travel into Stratford, the new vibrant arts hub in Canning Town or the more old fashioned West End for a good night out.

There are, however, some **inevitable side effects** of London's prosperity. A rising number of young professionals are sustained by a **high octane lifestyle** of binge drinking and recreational drug use (the latter fuelling the black economy), and **stress and depression** continue to be the biggest drain on health spending, costing London an estimated 2.5 million working days in 2022. Next generation psychoactive substances which stimulate neural activity and allow workers who use them to work several days in a row are widespread and even tacitly condoned by some of the bigger corporations.

Crime is low by historic London standards, but high profile instances of violent crime amongst the city's youth hint at the **gang culture** that persists and the alienation of those who feel that the success enjoyed by others is passing them by. There are some, of course, who benefit little from London's material prosperity. Whilst employment levels are high, **competition for jobs** in the most lucrative sectors is also high, and although more young people are now entering fulltime work with formal skills, some of London's youngsters still **slip through the net**.

Housing, transport and the environment

After such a slow start, the annual **house building** target of 31,090 units between 2007 and 2017 always seemed ambitious, and failed to be met on time. A **strong steer the centre** ensured that the target volumes were finally reached (four years late) but higher than forecast population growth has meant that the challenge to house this expanding city continues. **Housing costs remain high**, and for many younger people, the dream of buying their own home has been almost if not entirely abandoned, leading to a stronger culture of renting, and **high leisure spending to compensate**. A vibrant private sector offers 'first entry' level housing to many new arrivals, but where regulations are infringed, public agencies often seem to lack the capacity to intervene.

New housing developments in London have dealt creatively with the need to increase densities, and have been praised for their high aesthetic design quality and contribution to the urban landscape. Their credentials in terms of **environmental sustainability** have, however, been less impressive in the drive to meet volume targets. Some small scale flagship projects win plaudits for their innovative energy production and usage, but the majority of housing development escapes the scrutiny that environmental campaigners had hoped for.

The congestion charge has risen significantly across the last decade, and has been expanded further to the west and north, with an eastern extension in the planning stage. Public and even business opposition to this has been minimal as public transport improves and fulfils the essential task of getting Londoners to work. Thanks to this **hugely improved transport situation**, London's workforce has continued to spread out into the rest of the South East, with some commuting distances reaching hundreds of miles. The emergence of what amounts to a **region-wide 'mega-city'** creates headaches for planners trying to defend the green belt and create sustainable communities, and also proves challenging for **traditional governance boundaries** to accommodate. Hundreds of thousands of London employees spend most of their lives in the capital yet have no democratic voice in how it is run and little interest in the politics of their own dormitory towns.

The **environmental awareness** that blossomed in the mid-noughties did not maintain its trajectory in the decades that followed, not least because of the **tensions with growth** and prosperity, which appear too difficult to reconcile in the

short term. The affluent 'green consumer' is still a lucrative market, but campaigners warn that Londoners are 'sticking their heads in the sand' and in the long term cannot buy their way out of climate change. On the whole, the public seem to have lost faith in the value of 'doing their bit' and are relying on governments to come up with big, long term solutions to environmental challenges.

London's growing population is accelerating the need for new housing – affordable housing in particular – and, as a priority for all boroughs, has **pushed green issues further down the agenda**. The London Assembly, councils and businesses continue to set targets for energy efficiency, carbon emissions and improved recycling, but they are not ambitious, and capacity is not there to drive real improvements. At least thanks to massive transport investment (as well as the prohibitive congestion charge) car ownership in London becomes less and less attractive, and continues to fall.

Public services and healthcare

The failure of the public sector to keep pace with London's growth has led to far more **market driven private and third sector provision** and self-help. New communities and increasingly confident religious groups are setting up their own schools, hospitals, community and voluntary services to fill the gap left by shrinking public provision. London's Regional Assembly and the office of the mayor have built a high profile, within London, the UK and internationally, and local government is seen as less and less relevant to most people's lives. This only serves to entrench **voter apathy**, which is high. London boroughs are increasingly looking to 'vox pop' participation to fill the gap left by old fashioned democratic engagement.

Health services have failed to keep pace with population growth, and large numbers of young Londoners and new arrivals seem to have decided not to bother with conventional health care at all, turning to **alternative medicine or private provision**. Boots the Chemist, for instance, offers a range of services aimed at busy commuters, many of whom are not even registered with a doctor. For those dependent on social services and the NHS, there is a growing crisis, but spending problems and political squabbles mean that the issue is not being tackled.

Technological advances in medicine have improved the lives of Londoners with long term debilitating illnesses, and an ever higher number of terminally ill people are living longer and better lives.

Government measures relating to food content and advertising were tightened as a result of continuing youth obesity, which had reached 12 per cent by 2018. Sport, exercise and nutrition studies have seen renewed prominence in the curriculum. Obesity amongst the current generation of school children is now lower than it was five years ago, reflecting the success of these measures, but remains above 10 per cent. Amongst over-thirties, the rates of obesity and related illness are continuing to rise. Nine out of ten adult men in London are now over weight, half of them obese.

Life expectancy has continued to rise in line with predictions, though if obesity amongst adults cannot be successfully tackled, it threatens to start falling. Along with drug use, binge drinking, stress and depression, this serves to remind politicians that a wealthy London is not necessarily a healthy London, and that even in the good times there are significant challenges for the capital's leaders to overcome.

2. Hitting the Buffers: London Falling Apart

In this scenario London is characterised by **increasing out migration but steady population growth due to a higher than expected birth rate**, and a **prolonged recession**. These trends combine with others to create a prevailing social climate of **fear, suspicion and competition** between communities.

It is 2023, and London is a fractured city. Overtaken by international competitors and unable to shake off recession, London no longer has the self-confidence and optimism it once had. After a decade of fairly high in-migration at the turn of the century, movement to London from overseas has slowed in more recent years as the capital becomes less and less attractive as a destination for economic migrants. Out-migration, conversely, has increased amongst the most skilled sections of the workforce. However, a high birth rate amongst the young immigrant communities that arrived in the noughties and the teens is placing pressure on London's public services, their spending squeezed by the economic crisis.

Rising unemployment and competition for scarce resources (lengthy queues for basic provisions are common) has fostered inter-community tensions, leaving London a far more segregated and suspicious place than it was fifteen years ago. The poorest people live increasingly beyond the margins of formal society: in health and housing conditions that shame a once global city, and youth crime and gang culture are rife.

Sharp segregation is evident between the more established communities of owner-occupiers in the suburbs and affluent parts of inner London on the one hand, and the more marginal boroughs on the other, which seem to be going backwards as the hope of regeneration and economic growth recedes. Against this backdrop, the socio-economic heterogeneity that came to characterise so many neighbourhoods in the 'good times' is in decline as polarisation increases and the city's wealthier inhabitants retreat behind ever more advanced home security. Those global cities that have weathered the recession best, in the US, China and India, are attracting London's graduates, and London is neither the financial nor the corporate centre it once was.

Chronology

All of the scenarios offer an image of London in 2023. The following are some of the **key points** in the development of this particular 'trajectory' of the future – what happened between now (2008) and 'then' (2023) to bring this scenario into being.

- ✦ **2010:** The downturn in the housing market which began tamely in 2008 was worsened by the deepening world recession, resulting in a UK-wide housing market crash that hit London particularly hard.
- ✦ **2015:** An Olympic 'blip' in 2012 brought some respite as house prices began to

stabilise at around 25 per cent below their former levels, but the global economy remained in flux.

- ✦ **2016:** A government report seriously questioned the Olympic legacy as sites and facilities due for conversion remained mothballed, paralysed by the economic downturn. In the same year, a major international report suggests that as other global cities are showing the early signs of economic recovery, London seems unable to turn the corner.
- ✦ **2022:** With London's economy still in the doldrums, competition for resources in its poorest communities is high. Myths around preferential treatment for ethnic minority groups in housing allocation and public sector employment schemes are rife, and a revived BNP wins its first parliamentary seat (in outer-London) at the General Election.

Population, immigration and demographic change

London's population has grown over the last ten years, but less than was anticipated a decade ago. This is due in part to fewer migrants coming to the city, but also to high levels of out-migration as more Londoners choose to move out to other parts of the UK or, in the case of the most highly skilled and high earners, to other parts of the world. Opposition parties accuse the government of presiding over London's worst 'brain drain' for fifty years as skilled professionals look for a better quality of life working in the fast developing BRIC countries. The steady population growth that now exists is driven primarily by a high birth rate amongst London's young migrant communities. The city's **population is now said to stand at 8.8 million**, although a continual flow of news stories exposing weaknesses in official data mean that faith in statistics is low, and press rumours about a new tide of illegal immigrants fan the flames of community tensions.

Population growth is steady overall, but **demographic changes are proving difficult to cope with**. The original baby boomers are in their seventies and need increasing levels of adult social care, whilst a new baby boom generation in London, fuelled by high BME birth rates, causes problems for schools and children's services. **Poverty becomes evermore concentrated** in specific neighbourhoods as the better off leave those most depressed areas that were previously regenerating, resulting in **greater social - and ethnic - segregation**.

Community and civil society

London is a **much less tolerant and integrated city** than it was even a decade ago. Those more deprived parts of London which had seemed to be models of diversity back then have since become heavily divided. **Communities compete for the attention of under-funded public agencies**, and in the context of suspicion and resentment from other Londoners, ethnic and faith communities have become

increasingly inward-looking and self-reliant. Spending cuts have in any case left public services unable to cope with the demands placed upon them, and projects to improve integration and cohesion are forced to take a back seat at the time when they're most necessary. Recent studies into cohesion hint at a severe lack of common identity or a shared sense of belonging between neighbours. What most do share, however, is **apathy towards politicians and the political system**, reflected in a declining interest in engaging with civil society and the state at any level.

Crime rates have risen, and fear of crime, fuelled by the media, soars. This has led to a surge in the so-called 'gated community', with new interactive private security technologies becoming popular with resurgent Neighbourhood Watch groups in leafier areas where there is less population churn. Residents club together for CCTV surveillance and private security, and through interactive multi-media, all can be kept up to date with what's going on around them – in some cases **encouraging a worrying vigilante culture** to emerge. In more deprived areas where crime is worst, faith in an over-stretched police force is falling and organised crime, fed by a myriad of youth gangs, is on the increase.

Economy and skills

The recession has been damaging to cities across the country, but as the generator of so much of the nation's wealth, London has had furthest to fall. The wealth gap, masked in the days of plenty by a booming consumer culture, now **breeds resentment amongst the poorest in society**. A vast informal economy has sprung up to fill the void in parts of London and there are, for many teenagers, two 'careers' on offer, and the lure of cash in hand is hard to resist for a large proportion.

Poverty and worklessness are most marked amongst certain ethnic groups. The **employment rate** amongst those of Pakistani and Bangladeshi origin in London has barely shifted since the early part of the century, stagnant at 48 per cent and 37 per cent respectively. Two decades ago when child poverty in London stood at around 40 per cent, the government had aimed to eradicate the problem by 2020. Child poverty remains a reality, however, and **poverty still affects over a third of the city's children**. Initiatives to raise skills amongst London's young people have had little lasting impact, the economic meltdown a barrier to investment by industry and a disincentive to aspiration on the part of young people themselves.

The 'brain drain' means that London is **haemorrhaging skills to other cities** is finding it hard to attract the overseas talent it once did, or even to keep home grown graduates. The flow of Eastern European migrants that was so prominent twenty years ago has reduced to a trickle as opportunities in their home countries start to outstrip those of other European cities – and in particular London.

Whilst some 'alternative communities' of artists and musicians make the most of London's declining fortunes and move into the areas that others are moving out of, the creative industries more broadly are no longer as London-centred as they once

were. Within the UK, arts and media companies are increasing their prominence in places like Manchester and Leeds, and in finance and other fields, **the highest paid are drawn to resurgent world cities** such as New York. State support for the arts has barely survived in London, originally replaced by a willing private sector which is now tightening its belt and withdrawing sponsorship.

Home-working was already popular before the recession, and now as companies try desperately to cut overheads it is encouraged as never before. People are now much more accustomed with 'virtual chat' in their everyday lives, and for a whole generation of twenty-somethings brought up with online networking sites since childhood, this forms a major part of their leisure time. Added to the fact that digital home entertainments are ever more advanced, the relative attractions of bars, clubs and restaurants in this time of continuing economic stagnation are low. Horror stories about **crime on public transport** at night also deter some from going out altogether.

Housing, transport and the environment

The recession has **halted major public transport investment programmes** such as Crossrail (still yet to operate) and the system has been creaking at the seams for a decade. This failure to overhaul the transport network is seen as key to London's inability to get back on its feet and catch up with those other world cities, which were much nimbler in their recovery from recession. **Safety concerns and staffing problems** have even resulted in periods of suspension for some Underground lines. The congestion charge has been relaxed as a temporary measure, but few take advantage of this, the instability in the Middle East having sent fuel prices rocketing. Lack of investment in new technologies and alternative energies means that **London's misses its CO² milestone targets**, and the 60 per cent reduction by 2050 that was set at the turn of the century now looks impossibly out of reach.

Economic uncertainty has **stunted hopes of revival in the city's housing market**, the stagnation and subsequent fall in house prices leaves thousands of London home owners in negative equity. London remains the most expensive city in the UK, though the differential with other leading UK cities is narrowing. **Falling land values** mean that the dreams of regeneration in the east of London after the Olympics never became a reality, severely damaging faith in London's ability to make good on big strategic projects at a regional level. One London mayor after another has blamed the 'short sightedness' of boroughs, who in turn accuse London's regional governors of confused priorities and supreme arrogance.

The prolonged recession **hindered already ambitious housing targets**, and local and regional government have been too busy dealing with the city's other problems to provide sufficient steer. **Social polarisation** has meant the re-emergence of 'problem estates', which become virtual 'no-go' areas for the better off and which concentrate social problems in small areas, putting increasing pressure on strained

local services. Ironically, as housing in London becomes more accessible for first time buyers, many are now reluctant, given the uncertainty of the city's future, to commit such a large-scale investment. As they 'wait to see what will happen', **long term renting on the continental model** is now the norm for most young professionals. This leads to a continuing freeze in the owner-occupation market and slows down the London's economic recovery.

The housing market crash has made it easier for social landlords to build and buy already built schemes from developers. It was hoped that **the rise of registered social landlords** would undermine the worst elements of the private rented sector, but unscrupulous landlords continue to buy up one and two bedroom schemes intended for young professionals and **over fill them with migrant workers (and even families)**. Longer standing residents complain about rubbish and the increasingly unkempt environment, **exasperating community tensions** and lack of faith in councils to cope.

The direct impact of climate change on UK weather has hitherto been minimal, but in the last decade there have been devastating floods, droughts and famine in parts of Africa, Asia and South America. World recession has made the West slow to provide financial aid, and economic and political tensions in those most effected regions have led to a significant rise in migration to Europe. London's economic and social problems are making other European cities comparatively more attractive to these migrants, and hardened immigration laws in the UK have helped to stem the flow, but pressure on border control is growing and statistics on levels of illegal immigration are hotly contested, playing into the hands of political extremism.

Public services and healthcare

The **health system in London is buckling under the burden** of a population top heavy with young children and the elderly, yet finds its funding increasingly squeezed. **Public health is worsening**, particularly amongst immigrant communities who are becoming increasingly inward-looking and self-reliant in the face of rising intolerance. Amid the over-crowded apartment blocks that have become ghettos, and where facilities such as water and heating are frequently out of order, **disease and poor health go unchecked**.

New home technologies have made it much easier for Londoners to **interact with service providers** and have aided the personalisation of public service delivery. As authorities rely on these new forms of engagement and service delivery more and more, however, London's growing 'underclass' – who are, literally, disconnected – are **increasingly left out of the engagement loop**. Moreover, the general apathy that exists around political institutions has meant that even those with good remote access to public services are increasingly opting to tune out and switch off when it comes to making themselves heard.

3. Steady Ahead: Growing Outwards, Growing Greener

In this scenario London is characterised by **population growth in the middle band of current predictions**, a prevailing social attitude of **'tolerant co-existence'** and **medium economic growth** (i.e. with growth in output and employment in line with current long-term predictions).

It is 2023 and London is a city of villages. Socially, Londoners are happy living alongside one another, and will join forces at local fora such as community asset planning meetings, but genuine cohesiveness amongst people from different backgrounds is distinctly lacking. The last fifteen years have seen a shift of people, money and power from the centre to the suburbs, and from there onwards down to local wards and communities. This is partly due to public transport – London is more connected than it used to be, making it easier to live further away from the centre. It is also because of the hung Westminster parliament that devolved power to local councils, partially by-passing the regional tier. Local councils have, by and large, responded to an upward trend in community activism by devolving control for decision-making and spend to wards. Technology has played a part too, with a step change in affordability and effectiveness and the widespread provision of shared suburban office spaces abetting a dramatic increase in 'full home working'.

Sustainability and the environment have continued their steady rise up the political and personal agendas. The crucial difference is that the 'person in the street' seems more willing to change his or her behaviour to mitigate the march of climate change. You can see bicycle racks in almost every back garden now, as people take advantage of London's greatly expanded cycle network. Centrally, housing standards have become far stricter in terms of sustainability; this pleased the public initially, although this could change with the looming housing shortage. Financially, London has maintained its leading position in world cities, although public spending is beginning to fall. The flip-side of 'double devolution' is something of a patchwork: many commentators point to a postcode lottery of service provision, with your chances of getting good services highly contingent upon where you live.

Chronology

All of the scenarios offer an image of London in 2023. The following are some of the **key points** in the development of this particular ‘trajectory’ of the future – what happened between now (2008) and ‘then’ (2023) to bring this scenario into being.

- ✦ **2010:** London’s bus network undergoes a much-needed expansion in the run-up to the Olympics, and the cross-river tram (Camden Town to Brixton and Peckham) is introduced.
- ✦ **2013:** The London assembly responds to international scientific warnings about climate change (mainly coming from the UN’s new Environment Office), and begins to enforce strict emissions targets onto London businesses.
- ✦ **2018:** the national electorate returns a hung parliament for the second time in a row, after the previous coalition government is accused of fiscal irresponsibility. London councils benefit as yet further powers are devolved, and public spending begins to fall as the new administration seeks to reassure.
- ✦ **2021:** the Mayor’s annual report shows that in-migration to London has continued to rise steadily (from 31,000 in 1996, 100,000 in 1999 and 200,000 in 2021), particularly as parts of the Indian sub-continent and elsewhere are badly hit by the impact of climate change. London’s population now stands at 8.3 million.

Population, immigration and demographic change

The shape of London has changed. London’s population has grown at a **steady rate**, now standing at 8.3 million, in the middle of late twentieth century predictions. Immigration has also risen steadily (apart from the rush of Indian immigrants fleeing the subcontinent’s floods), since standards and employment prospects in East Europe have risen, persuading its nationals to stay home. Rather, it is the spread of people in London that has changed: the creeping **success of the suburbs**, spurred by the devolution of spending powers and target-setting to local authorities and thence on to local communities, has seen the model of young families leaving London challenged.

The **flight of thirty-somethings to the suburbs** is having the by-effect of highlighting the age polarisation in central London. Inner London is getting younger and younger, with 86 per cent of Londoners under the age of 64. This is good news for young people – zones 1 and 2 are more vibrant than ever and the music scene is booming – but bad news for older citizens, who alienated from inner London’s fast-paced, predominantly single, vibe. Older people are quickly joining the young families in the suburbs.

There has also been a continuing ‘net northward flow’, as Londoners look to take advantage of their higher-than-average house prices and exchange life in the south

for life in Manchester or Leeds. In 2021, for example, 38,000 people left London for one of the northern regions of the UK.

The last decade has seen a definite **slowing of the population churn** that was such a marked feature of the capital around the turn of the century. The mutually reinforcing trends of people moving to the suburbs and businesses moving out of the centre, when combined with important legislative changes such as greater control for boroughs over setting local tax levels, mean that when individuals and families find a borough that suits them, they often stay for longer than they would have done before.

Economy and skills

The economy has been up and down over the last fifteen years. The recession in the late-noughties had a negative impact on the whole of the UK, with spending reigned in, and business getting jittery. However, the Olympics played a big part in turning London's economy around, with the increase in demand for skilled and unskilled labour pulling the economy out of recession, then the rise in tourism and increased investment in East London. Outer East London developed a an **international reputation** as one of the most exciting urban spots in the world, and London continued to pull in top graduates and businesses. There have been a few blips since then, but the economy has averaged 1 – 2 per cent growth.

Currently, London's economy continues to outperform the UK's, despite the fall in public spending. In particular, the percentage increase in employment in outer London has risen sharply – by 8 per cent, as businesses begins establishing secondary offices in the outer boroughs, responding the young families and professionals basing themselves there. Improvements in broadband speed and coverage, as well as the introduction of neighbourhood wifi, has led to a large increase in the number of people working from home - most office-workers work from home at least once a week now, and this if often from the suburbs.

The communications industry saw the advent of **homeworking** as a great business opportunity, and communications technologies have begun to centre around home-working, including abilities for mobile virtual conferencing via personal embedded devices (or PEDs), the successor to PDAs.

Public spending is currently a cause for concern though, with decreasing public sector spending causing problems in social initiatives and housing - three major community cohesion initiatives in eastern boroughs were halted in 2018. In the years following this there has been a notable increase in hate crime in this area, which in turn is affecting the housing markets in the area.

Environment, housing and transport

Transport has been one of London's successes in the last decade – Crossrail was completed in 2016 (although three years behind target) and alongside this, the cycle

network has been hugely expanded, with roughly 10 per cent of people now cycling to the office (compared to only 3 per cent in 2007). Partly, the transport networks have improved because of the high cost of fuel, which makes private commutes expensive. But one cannot ignore the influence of the environmental agenda.

The **importance of the environmental agenda** has surged ahead since the noughties, and London has become a world leader in environmental adaptation, encouraged by a steer from central government. Summers and winters have gotten warmer, but extreme weather has not been common, with temperatures rising in the summer by 2 degrees on average. In terms of transport, environmentalism has expressed itself through greater penalties (the congestion charge currently stands at £30), and heavy investment in cycle and bus networks. The abundance of alternative, and more importantly reliable, public transport opportunities, has made the congestion charge easier to bear. Even the 4x4 driving young families have acquiesced, since they are spending more time in their local borough and tend not to drive so much.

Environmental standards for housing are strictly enforced by the Mayor's Office of Environmental Regulation: this is one of the few areas where London councils are willing to cede control. Whilst these standards have been strictly enforced for new build projects, there has been **much patchier progress on retro-fitting existing stock** (still the vast majority of the total). Installation of Combined Heat and Power units and photovoltaics has been strongly "encouraged" for existing housing stock, but the cost of doing so has meant that only where communities can come together to achieve the necessary economies of scale is action possible.

The strict environmental standards have made building more expensive: so, new builds are usually low or zero-carbon, but there are less of them, and the housing targets have been missed by a mile. The resulting shortage in social housing is causing political tension between campaigners on climate change and social welfare. The Thames Gateway has been hit particularly hard by stricter environmental standards, as the flood risks are deemed very high.

The **shortage of social housing** causes a particular problem for asylum seekers and refugees, who depend on affordable housing. Problems are also being experienced by older people, as their homes become inappropriate, and who are discovering that it is very expensive to meet the requirements for environmental adaptations to their homes. This is encouraging the flight of older people from central London, with many being unwilling to pay higher council tax than their younger counterparts who have made the necessary environmental adaptations.

Lifestyles, social cohesion and democratic renewal

Socially, London continues to be disconnected as a city as a whole, although borough-bound identity has increased. Although there is evidently a divide between the younger and older citizens in London, people have united around suburban

communities in the outer boroughs, to make them the focus of their day-to-day lives. Outer London suburbs are attracting young families in greater numbers, and a homeworking culture, evolving out of technological progress, means people are spending more time in their locality. Social opportunities – such as bars, clubs and music venues are increased in outer London, and certain areas have a vibrancy to counter central London (albeit a slightly older demographic enjoying this). Although the West End is still the focus of many nights out, art and music scenes have spread further, with Walthamstow being just one example of an outer London cultural centre. This has been aided by, in some cases, a new approach to town centre planning, focusing on mixed use developments and as much on opportunities for cultural exchange as retail therapy.

The devolution of spending powers has been the major stimulus for stronger boroughs – local councils have far more control over the type of area they develop. In some boroughs this has caused a move away from developing commercial properties, instead focusing on developing community town centres for the new families moving to outer London. Heightened borough control does have its downsides though, with a recent Guardian report arguing that Londoners are subject to the ultimate postcode lottery: in one borough you might find you pay low council tax, have a sustainable home and the choice of five schools; in another, you pay high council tax for unconverted stock and have limited choice in public services.

The trend of **contentment but disconnection** has continued, with people still likely to navigate toward similar social groups. The strong borough identity has started to challenge this, but not to any great effect. In fact, there are currently concerns that communities will become less cohesive, or tolerant, in the face of falling public spending. The new central administration is seeking to reassure the public of its financial credentials, and does not want to be seen frittering money away. The first cuts have been in integration initiatives. Crime rates are rising slightly (230 crimes per 1000 of London's population, compared to 217 per 1000 twenty years ago) – there has been an increase in knife and gang-related crime– an average of 8 incidents per 1000 people. Most of this crime focuses around the poorer central boroughs: the losers in the new postcode lottery. The affordable housing shortage could fuel this kind of discontent.

Sustainability remains an important lifestyle choice in contemporary London – whether its cycling, solar panels or an allotment, everyone tends to play a part in the move towards a more sustainable society. Bike racks are a common sight on the back of a black cab, as drivers pick up cyclists who have had one too many pints to cycle home.

Public services and healthcare

Public sector spending has fallen in absolute terms and there is a resultant increase in the use of private health care amongst the affluent. But for many health and social services are failing to keep up with growing needs. In a recent survey, only 55 per cent of Londoner's aged 16+ reported themselves to be in 'good health'. This is compared to 61 per cent twenty years ago. There is concern that the pan-London nature of the health agenda is being neglected in the increasingly borough-focused political climate.

Central action on smoking has been effective - the numbers of smokers in London is at its lowest for decades, as an entire generation of teenagers have grown up during the public smoking ban. Only 5 per cent of Londoner's consider themselves a 'regular' smoker. However, this only serves to exacerbate concerns that the lack of a strong pan-London health plan will have serious affects on citizens choices. Indeed, this is already being proved true: obesity rates are rising (8 per cent of all London deaths were obesity-related, including 900 from heart attacks).

Rates of cancer and HIV are both down, after decades of awareness-raising schemes and advice, as well as improvements in available treatment (especially for people with cancer). There are concerns that as public sector spending falls, the availability of the most effective (and most expensive) cancer drugs will decrease in some boroughs. This adding to the concerns over the emerging 'postcode lottery'.

4. Knocked Off Course: Shocks to the System

In this scenario London is characterised by **population growth in the middle band of current predictions**, a prevailing social attitude of '**social cohesion, understanding and strong community ties**' and **medium economic growth** (i.e. with growth in output and employment in line with current long-term predictions).

It's 2023 and London is recovering from a number of major disasters over the preceding three years, including the widespread flooding and infrastructure failure described here. Perhaps surprisingly, London is experiencing one of the most cohesive periods it has ever known, as the shocks and upheavals and the reconstruction that has followed fostered community spirit and a sense of common purpose. The capital's citizens are making use of technological innovations in engagement, to ensure they have the best chance of getting their views heard. Financially, London has avoided the recession that the problems have caused, thanks to the surge in demand for unskilled labour. This has also helped immigration rates, particularly from new accession states, remain constant. London's infrastructure is undergoing a period of change, as the underground and sewer system are rebuilt after flooding, and properties go through the major sustainability adaptations that climate change necessitates.

As always, London also has its problems: illegal immigrants, refugees, addicts and people with mental health problems have been hit hardest by the last three years, and are still struggling to recover, with many continuing to inhabit their ruined properties. The boroughs that have found it most difficult to recover are the heart of the informal economy, with drugs being traded freely away from the eyes of mainstream society. Those living in this area also continue to face severe public health risks, with TB rates rising.

Chronology

All of the scenarios offer an image of London in 2023. The following are some of the key points in the development of this particular 'trajectory' of the future – what happened between now (2008) and 'then' (2023) to bring this scenario into being.

- ✦ **2011:** London experiences record numbers of tourists as increasing international attention resulting from the Olympics combines with continuing hot summers and mild winters to draw people to the capital. Climate scientists dominate the headlines with warnings about where climate change unmitigated could lead, but the population is too busy getting a tan to take notice.
- ✦ **2015:** International reports of unusual weather patterns increase, as the USA experiences three devastating hurricanes in a single year, and South East Asia is rocked by a medium-sized earthquake.
- ✦ **2020:** The mild winters come to an abrupt end: serious and sustained rainfall causes a year of damaging floods in London, putting a number of underground lines out of action and making the sewer system a severe public health risk. The world watches, to see if one of the globe's leading cities will ever be the same.

The sustained flooding in 2020 has been just one of a number of disasters to strike the capital in the past three years. In the short term there was a significant impact on London's **economy**, as homes, jobs and businesses were badly hit and the failure of the underground affected productivity. The docklands area, for so long the engine of London's international success, was put out of commission for two whole years as transport links were damaged. A cross-London extraordinary council tax levy was imposed, to cover a portion of the repair bill, and a period of tightly circumscribed public sector spending prioritisation was ushered in.

One of the most devastating effects has been the number of people who defaulted on their mortgages (the official figure is 15,000 although the actual number is thought to be far higher; the majority of defaulters owned homes in the region affected by floods) and loans tied to the value of their properties. This was worsened as insurance companies revealed they would not be willing to insure any houses that were re-built on the flood area, unless very expensive defence systems were introduced. House prices in relatively 'flood-proof' areas have consequently soared.

The destruction of housing is also being seen as an opportunity though, with authorities pledging not to make the same mistakes twice. In line with new and **strict environmental housing targets** imposed by the London assembly, and central subsidies, the housing built out of the ruins is a model for sustainable development, including bioclimatic design, CHP and photovoltaics. The private housing sector has risen to the challenge, keen to make use of the subsidies the government offered, and have had their apprentices train in sustainable techniques.

The damage to housing has, paradoxically, provided an economic opportunity: namely, a route out of the localised recession: London's **economic recovery** began as skilled and unskilled labour was required in vast quantities to deliver essential repairs and rebuilding. London is steadily re-establishing itself as a financial centre and is piloting environmental planning schemes that should see London take on China as the world's most innovative sustainable developer. Engineering graduates are flocking to London from all over the world.

The population has grown and aged as predicted, with the only surprise being the abrupt end to immigration during the toughest times, and the just as abrupt influx once skilled and unskilled workers were needed in the rebuilding process. **Climate change** (summer night temperatures have risen by a huge 7 degrees) has seen more EU nationals choose to stay in London, rather than return home to hotter climates.

To the surprise of many, London is going through a period of relative **social cohesion**: allotments, sports clubs, community activism, all play a part in the lives of individuals. Rehousing programmes also forced people from different backgrounds to live closely, encouraging integration and understanding amongst different social groups. People are also working from home much more, since the advent of HiPer (High Performance) hub technology, and closure of the underground, so tend to spend more time in local cafes and spaces, meeting people around them. Those who have to travel into work often do so as part of a community 'car club', although driving is on the decline: 11 per cent now walk or cycle to work. The streets are more pleasant places to spend time since car use has decreased – particularly since the pollution levels in London now average '3' – just inside the 'good' quality rating, rather than in the 'moderate' rating of a decade ago.

Whilst **crime** has fallen overall and cohesion increased, criminal activity has become more concentrated in the boroughs that have faced the most uphill struggle in re-establishing themselves following the 'dark days' of the past three years. These areas are home to the most deprived pockets of society (illegal immigrants, refugees, addicts). Slums are growing in abandoned housing, and in this area the crime rate is an astonishing 270 crimes per 1000 of the population. Gangs operate freely here, and the informal economy thrives. The flooding had many negative consequences for London's **health**. The incidence of water-borne diseases rose rapidly, as workers struggled to sanitise conditions in the flooded boroughs, and there are still concerns about conditions such as TB spreading amongst the deprived communities still living in ruined housing.

5. Out of Control: Divided City

London in this scenario is characterised by **population growth in the middle band of current predictions**, a prevailing social attitude of '**segregation, fear and suspicion**' and **medium economic growth** (i.e. with growth in output and employment in line with current long-term predictions).

In 2023, London is a city of divisions. The city enjoyed a period of steady economic and population growth in the 2010-19 period, continuing as one of the world's financial hubs, recovering from a period of sustained global economic instability. The employment market remained steady, with unemployment in London falling slightly during the Olympics, as many of East London's long-term unemployed found temporary and longer-term work. Not all stayed on after the Games, but East London is still benefiting from its regeneration, and particularly from the improved public transport links.

During the year after Turkey's accession to the EU (2020), immigration rates increased as professionals, skilled, and smaller numbers of unskilled, workers came to London. In December 2021 there was a terrorist attack in San Francisco. The international situation quickly became unstable, in the form of renewed hostility to Muslim communities. London was no different, and the fractures in its apparently cohesive multi-cultural society began to show. In 2023, there is **serious ethnic and religious segregation** in London, with affluent white communities living apart, sometime in gated areas, from their neighbours.

Chronology

All of the scenarios offer an image of London in 2023. The following are some of the key points in the development of this particular 'trajectory' of the future – what happened between now (2008) and 'then' (2023) to bring this scenario into being.

- ✦ **2012:** the Olympics begin, and the whole of London is on a high. Unemployment is down, East London is looking the best it has for decades, community relations are stable, and the city is at the centre of world media attention.
- ✦ **2020:** Turkey accedes to the EU, amidst controversy. The tabloid press begin scare-mongering, although the first wave of immigrant workers are received peacefully, and it seems that London has avoided any compromise of community relations.
- ✦ **2021:** A terrorist attack in San Francisco shocks the world, and jeopardises the recently peaceful relations between US/UK and the Middle East. Tensions between Muslim and non-Muslim citizens in London reach boiling point, and highlight the fractures between London's communities, including the increasing disenchanted youth.

Spatial segregation is the most noticeable element of London society. South London, once one of London's multi-cultural hopes, is now sharply divided between the 'white' and the 'black' areas, the 'young' and the 'old' areas. Disparate living is even more apparent when you reach zones 4 and 5 – this area is a mixture of affluent gated communities and deprived Londoners trying to find the cheapest rent they can (currently about £450 p/m even in zones 4 and 5). The divide between the young and old is almost as serious as the emerging racial barriers to integration. London is a young city within an ageing country (85 per cent of London is under 65). Although to their frustration and anger, young people are being priced out of London, and forced to move back in with parents or never leave in the first place to save money.

Crime is rising amongst disenfranchised, poor and angry communities – particularly youths (220 crimes per 1000 of the population). Race-hate crime is also increasing, with a number of high-profile racial attacks on London's Muslims making the headlines after the terrorist attack in San Francisco. As you'd well know from the tabloid press, **immigration rates** to London have risen slightly in the last few years, particularly from Turkey – asylum seeker statistics show that there were over 20,000 applications from Turkish asylum seekers in 2022, up from less than a thousand in 2006. This has increased segregation – partly because of the climate of hostility and fear, stronger since the San Fran terrorist attack, and partly because Turkish workers tend to crowd into cheap multiple-occupancy accommodation.

The culture of fear that is emerging from poor racial and generational integration, alongside rising crime and youth discontent, has seen an already steady increase in use of surveillance technology go through the roof, with advanced alarm systems, CCTV and even personal iris recognition programmes widely used amongst West London's affluent citizens. 65 per cent of London home-owners admitted to having three or more forms of security for their home, in a recent London poll. The **housing** situation in London is a mixture of extremes. Everything from slums to gated communities can be found within the city. On top of this housing standards are falling to make building cheaper. Local authorities, desperate to counteract the anger of young people at their exclusion from housing, are pulling out all the stops (and standards, particularly environmental ones) to expand the social housing stock. An increase in car use (due to a lack of sufficient investment in public transport) has also angered an emerging hardcore activist movement in London's youth. The activist branch of London's youth have begun a well-reported direct action campaign against the planes which people continue to use for their holidays, and the cars they continue to drive through London.

London's **economy** is defined by the polarised employment figures. For most young graduates, things are continuing as always – out of university and into high-performing London-based firms. However, there is a worrying trend of non-participation in employment emerging in Muslim communities – perhaps driven by fear of prejudice, Muslim workers are beginning to opt out and become increasingly self-reliant. This is even visible in the graduate world, with a declining rate of employment amongst Muslim engineering and science graduates. The San Francisco terrorist attack has had a serious impact on the world energy markets, as North America's and Western Europe's relations with the Middle East soured. Several oil fields were set alight, and pipelines obstructed. Late 2021 and early 2022 was blighted by occasional instability of energy supply, and more often, high energy costs. 2023 threatens more of the same. Although community relations are severely strained, the accession of Turkey to the EU has brought many positive benefits for the UK, and London's economy, bringing a much needed mixture of skilled manual workers and professionals into the country.

As social disintegration and segregation has increased, so have attitudes to education, and **schools** have become polarised, with some parent pressure groups campaigning against the inclusion of Islamic festivals, or the provisions of prayer space. Feeling trapped, Muslim parent groups have called for an increase of specialist faith schools.

Attitudes to sustainability are also mixed, and at odds with each other. In the first decade of the century, climate change was high on the public and the policy agenda. Now it has all but been forgotten by the mainstream. The worst effects of climate change are yet to be felt, although no-one can help but notice how mild winters have been recently. Some groups are strongly environmentalist, with eco-communes

appearing in North-East London, and environmental direct action groups operating in West London. Other groups, particularly from the wealthiest parts of London, are not engaging with climate change, and instead prefer to spend their money on security. Different still are the wealthy neighbourhoods who are purchasing solar paneling en-mass, to protect themselves against the potential energy crisis.

There has been a recent resurgence in malaria. At first the press were keen to blame the higher immigration rates, suggesting diseases had been 'brought in', however research at UCL's tropical medicine department has recently confirmed that the outbreak is down to the UK's hotter climate. Mosquitoes carrying malaria no longer find it difficult to survive in the UK climate. The School of Tropical Medicine predicted that London would be see increases in other tropical, mosquito-borne diseases as well.

6. Brakes On: London in the Slow Lane

This scenario is characterised by a **shrinking population** and prolonged **recession**, but generally strong ties between different communities and good levels of **cohesiveness**.

It is 2023, and London is a faded star amongst its global rivals. The lingering impact of a prolonged recession, combined with rising taxes that squeeze the super rich, have seen London's wealthiest inhabitants drain away to other cities. The cultural and economic boom of the first decade of the century have been replaced by an air of faded grandeur. Population projections have failed to materialise, and the city's population is in fact shrinking for the first time in the last 50 years.

The city's declining economic fortunes are placing a heavier burden on public services, and state intervention has increased, funded by the tax rises so unpopular with big corporations and their wealthiest employees. A more active public sector is partly a response to circumstances: London is no longer the magnet it once was for private sector investment. Welfare schemes are more numerous and social housing is higher up the agenda than it has been since the 1970s.

Yet despite the parlous condition of the economy the Londoners that remain have, in some senses, a better quality of life, or at least have accepted their situation and resolved to 'get on with it' and each other. Significant state investment in public transport makes getting round the city much easier, and for an entire generation of young Londoners, cycling to your destination is the norm.

Chronology

All of the scenarios offer an image of London in 2023. The following are some of the key points in the development of this particular 'trajectory' of the future – what happened between now (2008) and 'then' (2023) to bring this scenario into being.

- ✦ **2012:** the Olympics are viewed by many as an unmitigated disaster – a source of great shame to Londoners, as key venues are not fully completed on time and the games are mired in controversy centring on bribes paid by corporate sponsors to the organising committee and others.
- ✦ **2016:** Environmental activist groups launch an unexpected raid on Heathrow's terminal 5, bringing flights to a standstill for almost three days by gluing and chaining themselves to runways. It is a publicity stunt to raise awareness about climate change, but is responded to angrily by holiday-makers and business-people, who launch lawsuits against the perpetrators.
- ✦ **2020:** the extent of London's fall from international grace is clear as no fewer than 10 major corporations pull their headquarters out of the capital in favour of alternative sites in other countries. The skyscrapers once the pride of London's skyline stand empty and unoccupied.

What began as a state of affairs enforced by circumstance – namely the most prolonged and severe recession in recent memory – has become an accepted and even actively supported rejection of capitalism. Most Londoners enjoy a **better work / life balance** than they did twenty years ago. Britain's working hours are now more in line with those of other European nations. Business leaders complain that London will never regain its competitive edge unless workers put the hours in, but for the time being at least, Londoners seem to value their time above their earnings. Wage differentials between London's richest and poorest have narrowed, partly because at the top end the most highly paid jobs are disappearing elsewhere, whilst at the bottom end increases to the minimum wage and the lack of cheap immigrant labour mean that wages are up for the unskilled and semi-skilled workforce.

Migration into London has declined and is lower than projected as other, thriving world cities become comparatively more attractive. Immigrants are now more likely to be non-EU residents, with workers from Eastern European states increasingly opting to remain in their own booming cities. It is generally felt that the decline in migration has allowed London's diverse communities 'breathing space' to stabilise and settle without the pressures of absorbing large numbers of new arrivals. There is much less churn in London's population today than there was fifteen years ago, with families less likely to relocate out of the city and the age profile of most boroughs changing accordingly.

The state-driven, social housing oriented **house building programme** of the previous two decades and a new allocation process has helped to 'de-ghettoise' those parts of London where residential segregation between ethnic groups was most evident. Moreover, better economic prospects for Britain's BME communities means that more affluent, traditionally white suburbs are now opening up to a broader range of residents. In terms of social networks, moreover, there are many more opportunities for people from different backgrounds to meet and forge friendships than was previously the norm.

Commercial property prices have been hit by the recession. In the city, the newer landmark office buildings have struggled to find occupants and there have been some high profile 'defections' of firms relocating – in some cases entirely – to other parts of Europe. Meeting **CO² targets** has been a priority for successive governments and London mayors. Harsh limits have been imposed on businesses, including airlines. For over a decade, as the impact of climate change began to be felt in Southern Europe, public opinion was behind such measures. In the context of London's falling international status, however, a growing number of politicians and business leaders are asking if London has put itself into an environmental straight jacket.

Better social integration and reduced threat of terrorism has encouraged greater understanding between cultures. As immigration levels fall (and the issue cools down in the media) London's existing ethnic communities feel the benefit, having previously complained that hostility to new arrivals was leading to hardening attitudes to all minority groups. The sense of **communitarianism** in London's boroughs has fostered a resurgence in the use of the public realm – and fierce protection of publicly owned land against 'corporation creep'. Activities such as neighbourhood picnics, arts events and sports days have become hugely popular in some communities, often initiated by local authorities but now self-sustaining. Commentators talk about 'a renaissance in belonging' with squares, parks and other public spaces generally better kept and better used than they were twenty years ago.

Crime rates have fallen, and in this climate, attitudes to security have relaxed a little. Londoners are proud of their openness and reluctance to fence themselves off from each other. The socio-economic mix of residents has improved in many boroughs, and all reliable measures point towards neighbourliness and trust being higher than it has been for decades. As one politician cynically commented, 'no one's got anything work nicking these days'.

Volunteering is up, with **community activism** much stronger than previously. Some social entrepreneurs claim it could be stronger still, but that state intervention is stifling grassroots action and involvement, rather than encouraging it. The recession hit the most commercial forms of leisure activity. Associational culture and group activities are more popular than they were, and third sector leisure providers,

evolving from the community-based volunteer groups given a leg up by new funding streams ten years ago, are now an important part of the market in London.

There has been a big investment in **education** in London and the gap between the best and worst schools has narrowed, in some places significantly. The social and ethnic diversity of university entrants is greater than it was two decades ago, and FE / business partnerships seem genuinely to be equipping London's young people with the necessary skills for the jobs market. London is better at nurturing home grown talent – attainment and employment amongst its young people have increased. Pockets of worklessness remain difficult to overcome, however, and still effect some ethnic communities more than others.