City of London

Appendix 2

Baseline Information

Local Plan Review

Environmental Report

City Plan 2036 Proposed Submission Draft

March 2021

Table of Contents

1. Introduction 3
2. Biodiversity Flora and Fauna 6
3. Population and Human Health 12
4. Soil and Water 32
5. Air 35
6. Climate 42
7. Material Assets 47
8. Cultural Heritage and Landscape 52
9. Waste 55

1. Introduction

1.1. The baseline information in this appendix covers significant effects and issues identified in the SEA Directive 2001/41/EC Annex 1 (f): biodiversity, population, human health, fauna, flora, soil, water, air, climatic factors, material assets, cultural heritage including architectural and archaeological heritage, landscape and the interrelationship between the above factors. Baseline information is reported with references to the city's monitoring and Information reports included where appropriate.

COVID-19 pandemic

1.2 On 11 March 2020, the World Health Organisation declared the coronavirus, known as COVID-19, a global pandemic.

1.3 The global pandemic has caused immense global disruption and suffering. The UK has been one of the worst affected countries, both in terms of people's health and wellbeing, and economically.

1.4 The effects of the pandemic in the medium to long-term, and particularly over the full extent of the City Plan 2036 plan period, are unknown. Much depends upon the evolution of the virus, and society's ability to develop and rollout vaccines or treatments.

1.5 In the short-term, the impacts have been profound and possibly unprecedented for at least a century. Apart from the impacts on death rates and people's health (particularly older members of the community, those with pre-existing conditions, and certain sectors of the population), the indirect impacts on sectors of the economy have been substantial.

1.6 From a planning perspective, the pandemic has brought to light the importance of healthy living environments, access to nature and outdoor space, the ability to exercise, and the impact of noise and pollution. It has driven a number of changes to people's work and home lives. For the City of London, these changes include the shift to remote working for the majority of the City's office-based businesses, reductions in journeys to the City and footfall within the Square Mile. There has been a significant impact on the City's retail centres, as people have switched to online shopping and restrictions have been placed on restaurants, bars and other social and cultural activities.

1.7 Whether these trends continue once the pandemic is over, or whether they have simply speeded up trends that were already happening, is difficult to

predict. However, it has provided planners with renewed food for thought and increased emphasis on the role of town centres and the high street, the need to provide for both informal and formal recreation, and the design of healthy places in which to live and work.

UK's departure from the European Union

1.8 The UK left the European Union (EU) on 31 January 2020, although a transition period remained in place until 31 December 2020. During the transition period, the UK complied with all EU rules and laws, and virtually nothing changed for businesses or for the public.

1.9 Shortly before the expiry of the transition period, the UK and the EU signed a Trade and Cooperation Agreement which will governs the terms of future trade in goods and services as well as arrangements for cooperation on matters such as public procurement, aviation and road transport, energy, fisheries and law enforcement.

1.10 The full social, environmental and economic impacts of Brexit (whether positive, negative or negligible) were unknown at the time the Proposed Submission Draft City Plan was being prepared and, even now, they may take many years to materialise. Therefore, in appraising the effects of the City Plan 2036 against the likely future baseline in the absence of the Plan, no major changes to the current baseline have been assumed. As the effects emerge of the UK's departure from the EU, including future trade arrangements, they will be considered by the City Corporation and any necessary adjustments to planning policy made via review of the City Plan and accompanying further sustainability appraisal at that time.

Planning White Paper

1.11 In August 2020, the Planning White Paper entitled 'Planning for the Future' was published for consultation over a period of 12 weeks. The document proposes a number of reforms of the planning system, to streamline and modernise the planning process, bring a new focus to design and sustainability, improve the system of developer contributions to infrastructure, and ensure more land is available for development where it is needed.

1.12 The details of the proposed reforms have not yet been confirmed. Therefore, the impacts of the Planning White Paper have not been factored into this Sustainability Appraisal. The Ministry for Housing, Communities & Local

Government is currently working through the consultation responses received on the Planning White Paper.

2. Biodiversity Flora and Fauna

Context and baseline - biodiversity

2.1. Biodiversity in the City is constrained by a number of factors such as high density of buildings and built infrastructure, the small size and isolated nature of open spaces and pressure on open spaces from high numbers of workers. Nonetheless a series of habitats and species have been identified in the City's Biodiversity Action Plan (BAP) 2016 - 2020, as being important to the City and action plans have been put in place for their protection. This BAP is currently under review.

2.2. The BAP provides a strategic focus for decision makers and covers the open spaces, habitats and species in the City of London including Bunhill Fields Burial Ground in the London Borough of Islington. It provides a framework to fulfil all legislative requirements relating to the management of green spaces and identifies and prioritises actions for biodiversity at a local level.

2.3. The BAP will be delivered under the following themes: 1) Open space and habitat management (protect and enhance habitats and species), 2) The built environment (improve green infrastructure), 3) Education and community engagement (promote a greater understanding of the City's biodiversity), 4) Data collection, surveys and monitoring (improve monitoring and data).

2.4. The City's BAP target species are as follows:

- Black Redstart – With fewer than 100 pairs nesting in Britain the Black Redstart features on the amber list of birds of conservation concern. Central London and specifically the City of London are an extremely important location for this species. The increase in the number of green roofs in the City is likely to be the key to continued success of this species in the Square Mile.

- Peregrine Falcon –Peregrine Falcons have been present in the City for a number of years and are legally protected under Schedule 1 of the Wildlife and Countryside Act 1981. Around 20% of the European peregrine population breeds in the UK and therefore it is important to protect this species. The Peregrine Falcon's natural habitat is cliff ledges and therefore they are attracted to the City's tall buildings which mimic this habitat.

- Swift – The Swift is a medium sized bird which is an excellent flyer but unfortunately their breeding numbers in the UK have declined by over 55% since 1995. They are summer visitors to London that arrive in

April and leave in August and migrate in winter to Africa. Swifts have adapted to make the urban landscape their home, favouring the eaves and roof space of buildings. Building management guidelines should include retrofitting of Swift nesting boxes in refurbished and new developments to prevent the decline in breeding numbers.

- House Sparrow – Once among the most common birds in England, their numbers peaked at over 12 million pairs in the 1970's but this species has seen a massive decline of around 70% in London in the last 25 years. Because of this rapid decline the sparrow is now on the red list of species of high conservation concern. Their decline is linked to availability of food, air pollution and loss of habitat and nesting sites. Refurbishments and new developments should include the provision of nest boxes, planting seed rich species, and establishing more areas of dense shrub cover.

- Bats – There are 17 species of bats in the UK with the common pipistrelle, Pipistrellus pipistrellus, being the most common species in inner London. They forage over water and use tree lines to aid navigation and are regularly seen in the City over the Barbican lakes and gardens. Further surveying and monitoring are required to establish their distribution in the Square Mile. It is important that suitable feeding sites are protected, and that artificial lighting does not disrupt their flight paths. Habitat enhancements for bats can include night-scented planting and the provision of bat boxes or bat bricks incorporated into refurbished and new developments.

- Bumblebees - There are 24 species of bumblebee in the UK but only eight of these are common and they live in colonies of up to 200 workers. Queens hibernate underground during the winter, emerging in spring to find suitable nest sites. They are important pollinators of many plants and fruiting trees. Urban areas can provide a diverse range of flowering plants which extend the season and availability of pollen and nectar. The decline of bumblebees is linked to a reduction in wildflower-rich meadows and an increase in landscape management practices.

- Stag Beetles – Although there are as yet no recorded stag beetles in the City, efforts are being made to create suitable habitat to attract this species. The Stag Beetle is the UK's largest ground living beetle and is a nationally threatened species. The population decline is related to habitat loss due to development and landscape management practices which remove dead and rotting material.

2.5. The objectives in the previous BAP (2010-2015) focused on the following habitats: firstly urban greenspaces, churchyards and cemeteries; secondly built structures and thirdly the Tidal Thames. A more landscape-scale approach has been adopted in the existing BAP (2016-2020) and all elements which impact on habitats and species will be taken into account. Specific action plans will be developed for some species such as the Black Redstart and 'priority habitats' identified by the London Biodiversity Partnership. A further habitat recognised as a London biodiversity target within the City of London is the Tidal Thames, which is also the City's only Site of Metropolitan Importance for Nature Conservation (SMINC).

2.6. The distribution of open spaces with trees and soft landscaping for biodiversity in the City are shown in Figure1 and the distribution of green roofs across the City is shown in Figure 2.

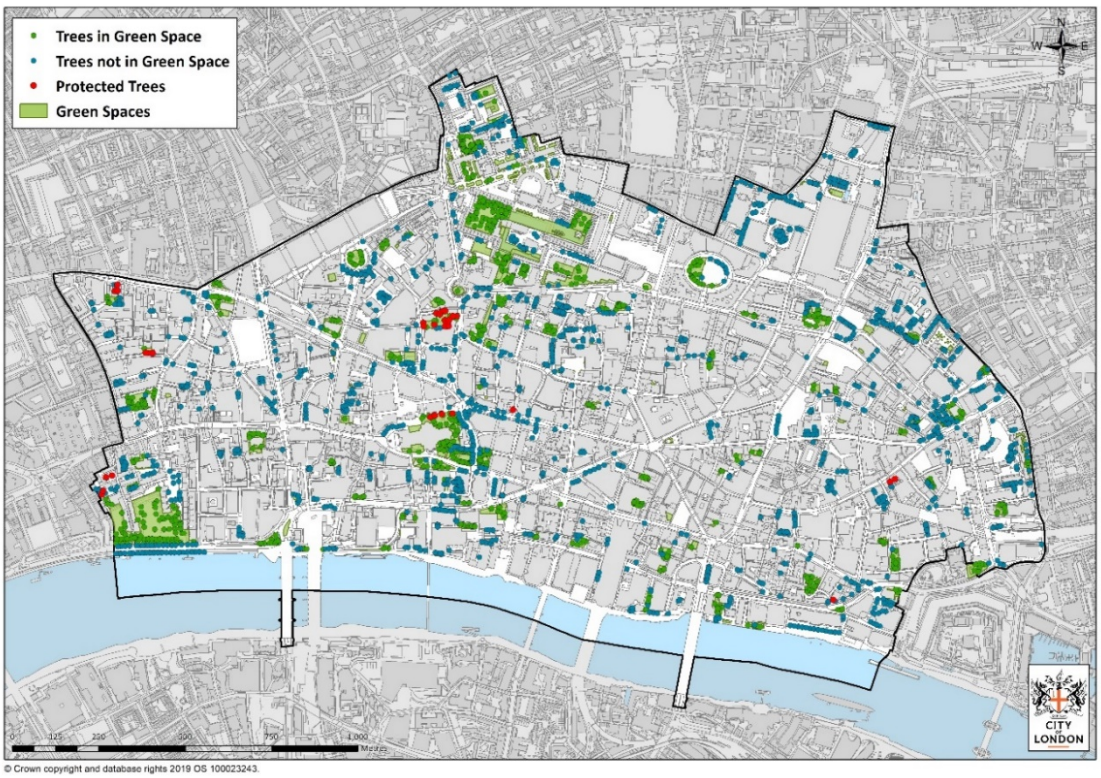


Figure 1: Trees and soft landscaping in the City of London

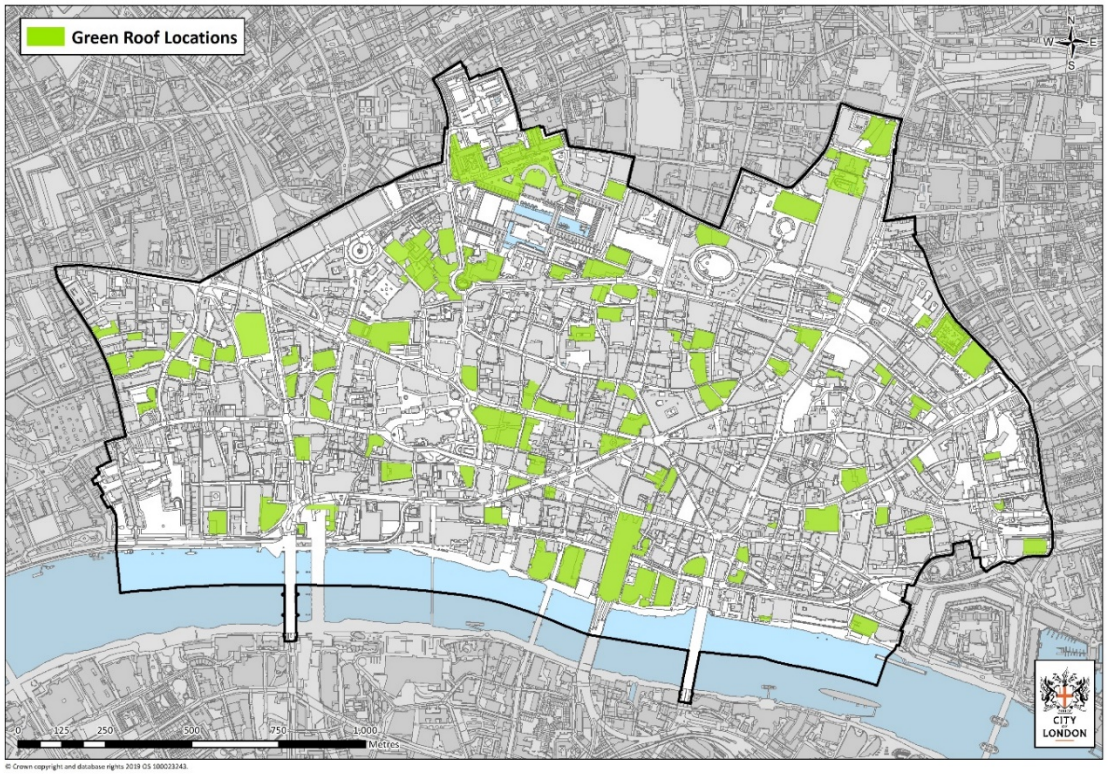


Figure 2: Green Roofs in the City of London

Progress against previous SA objective - biodiversity:

Objective: To maintain and enhance biodiversity

- There has been a net gain of 1.48 hectares of open space from 31.35 hectares in 2013/14 to 32.83 hectares in 2018/19. Please see City of London Local Plan Monitoring Report – Open Spaces and Recreation Report (March 2019).

- In parallel with this there has been a large increase in green roof provision associated with development. Schemes completed between 2013/14 and 2017/18 have provided approximately 11,300m^2 (1.13 ha) of additional green roof space contributing to 42,600m^2 total green roof area in 2018. Please see City of London Local Plan Monitoring Report – Green Roofs (December 2018).

- The Friends of City Gardens have produced several Bird Surveys of the City of London and one produced in 2016 concluded that there is a healthy population of Black Redstarts and species such as the House Sparrow, Peregrine Falcon, Herring Gull, Black Headed Gull and Grey Wagtail, which are all breeding in the Square Mile. There has also been a sighting in the City of a pair of Long-tailed Tits. However, the number of Goldfinches has declined and there has been a lack of sightings of Greenfinches.

- 2019 was the second year of systematic observations of bats in the City of London using static recorders. The results show that there is a widespread population of Common pipistrelle (*Pipistrellus pipistrellus)* that is present throughout the year. The results confirm that these bats not only forage and breed in the City during summer months but also hibernate here in winter. The data also suggests that other bat species may be present, namely Nathusius' pipistrelle (*Pipistrellus nathusii*) and Soprano pipistrelle (*Pipistrellus pygmaeus*). However, since it is difficult to distinguish the calls of these three species from sonograms, only observations of Common pipistrelle are recorded.

- Data on stag beetles is not currently available.

Commentary

The Local Plan policy of protecting existing open spaces, encouraging green roofs and promoting planting for biodiversity and climate resilience has contributed to some positive impacts on biodiversity. However, it may be necessary to target measures to promote awareness of the City's target species and bird populations which are declining.

Likely evolution without a revised Local Plan

As pipeline development is completed some areas of open space and green roofs and walls should increase. This will bring positive benefits for biodiversity although this may not automatically assist the City's target species without further intervention. Further intensification of development will mean more people working in the City and increased pressure on existing open spaces as places for leisure and quiet time which could impact on biodiversity. However, there are opportunities for new developments to create open spaces at ground and elevated levels and to create green roofs, green walls and roof terraces. The completion of the Thames Tideway Tunnel in 2025 will have positive impacts on river species due to reduced river pollution from sewer outflows.

3. Population and Human Health

Context and baseline - residential population

3.1. The City as the central business district for London has a low resident population and a large daytime population, most of whom commute to the City from elsewhere in London and beyond. This section will therefore consider both the resident population and the daytime population of workers. Census data used in this section from 2011 will be updated after the next Census is undertaken in 2021. Where information after 2011 is available from other sources it has been included.

3.2. The residential population of the City of London as defined by the 2011 Census of Population is 7,400. In estimating and projecting population in the City, a factor which provides a high level of uncertainty is the 1,370 persons who were residents within the UK and had a second home in the City at the time of the 2011 Census. In 2011, 25.5% of Council Tax registrations were second homes or empty and this increased to 27.4% in 2019. In producing estimates and projections for future years it is difficult to assess whether there will be changes in the proportion of persons who are permanent residents or those who have a second home in the City.

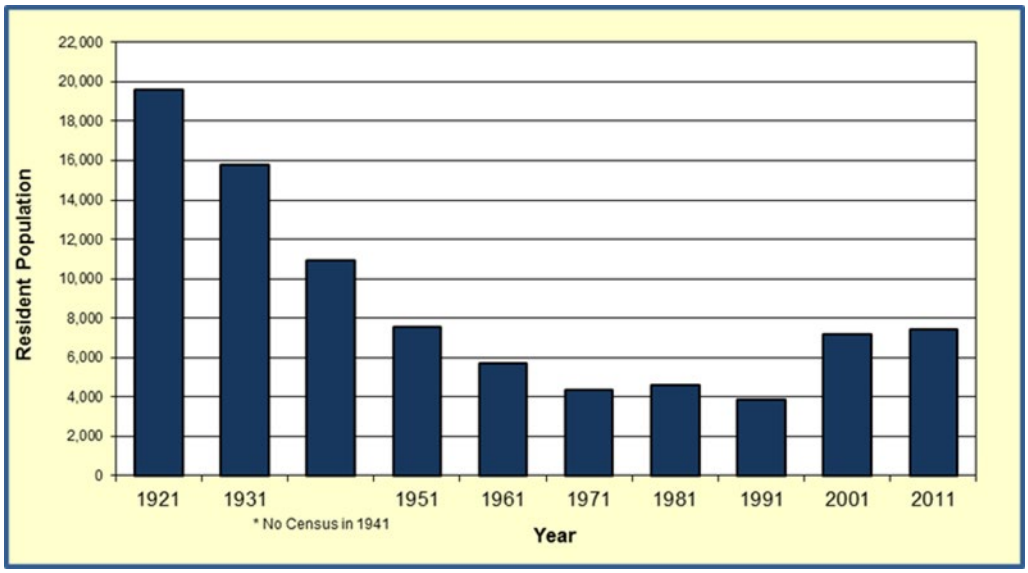


Figure 3: City of London residential population 1921-2011

3.3. In terms of the long-term trend, the population of the City decreased rapidly between the 1871 and 1921 Census counts, as the commercial base of the City expanded and residents were displaced to surrounding areas. This decline continued, but at a slower pace, until 1991 when the population was approximately 4,000. Following boundary changes in 1994, including the addition of the Mansell Street area and the Golden Lane Estate to the City,

this figure was amended to about 5,400. The rise in population to 7,185 in 2001 represented the first increase in the residential population of the City since the Census began and the 2011 census confirmed a slight upward trend in City resident numbers to about 7,400.

3.4. Since the 2011 Census, population projections can be derived from two different sources. Trend based projections are provided in the ONS Sub-National Projections. Alternatively, the GLA publishes housing-led (SHLAA-based) population projections which model population growth within the context of housing supply constraints set out in the SHLAA.

3.5. The ONS Mid-Year Estimates and Sub-National Projections are primarily a trend-based data profile utilising a range of births, deaths and internal and international migration data. An initial series of Mid-Year Estimates between 2011 and 2016 set out a significant growth in the City of London resident population. Revised estimates incorporated a change of methodology applied to the international migration component, which is difficult to estimate as the UK has no population register. The revised estimates for the City showed a significant net outward international migration in 2012 and 2013 before a net inward international migration for the years 2014 to 2016. This had revised the population estimates to a significantly lower level than the original estimates. The Sub-National Projections project a steady increase in population from 8,706 in 2018 to 9,021 in 2026.

3.6. Estimating and projecting the resident population is subject to a range of factors. Consideration of migration data and use of housing as second homes and short term lets make it difficult to develop a national or regional methodology that produces a set of accurate estimates and projections for the City. The GLA 2018 housing-led (SHLAA-based) projections incorporate the profile of new housing to be delivered in the City and thus reflect the most likely level of residents and population. The level of population is projected to increase to 8,203 in 2026.

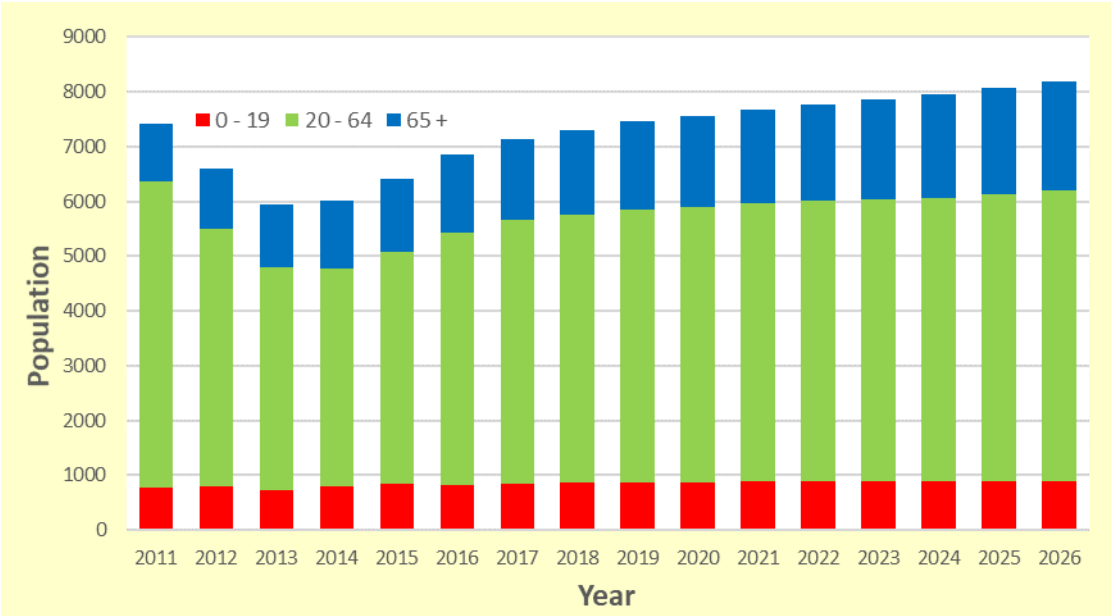


Figure 4: City of London demographic projections by age band 2011-2026 (source: GLA)

3.7. In assessing the age profile:

- There is projected to be a steady increase in Age Band 0-19 from 780 in 2011 to 901 in 2026. Given that developments in the housing pipeline are predominantly flats with a small number of rooms it is difficult to assess whether this will materialise in practice. This represents a 16% increase in this age band.
- The Age Band 20 - 64 is projected to decrease slightly from 5,582 in 2011 to 5,305 residents in 2026. This is a decrease of 5%. This age band will also be the main occupier of Second Homes or Short Term lets.
- The Age Band 65+ is projected to increase significantly from 1,051 in 2011 to 1,997 residents in 2026. This is an increase of 90%. This is largely due to the ageing of the population profile in the main residential locations of the Barbican and Golden Lane, but is based on the assumption that a high proportion of older residents will remain in their current accommodation.

Figure 5: Age profile of City of London residents by gender (source: GLA)

Ethnicity of Resident Population

3.8. The white ethnic group decreased from 90% of the population in 1991, to 84% in 2001 and to 78% in 2011. The Asian ethnic group has increased to over 12%. The black ethnic group increased by one percentage point from 2001 to 2011.

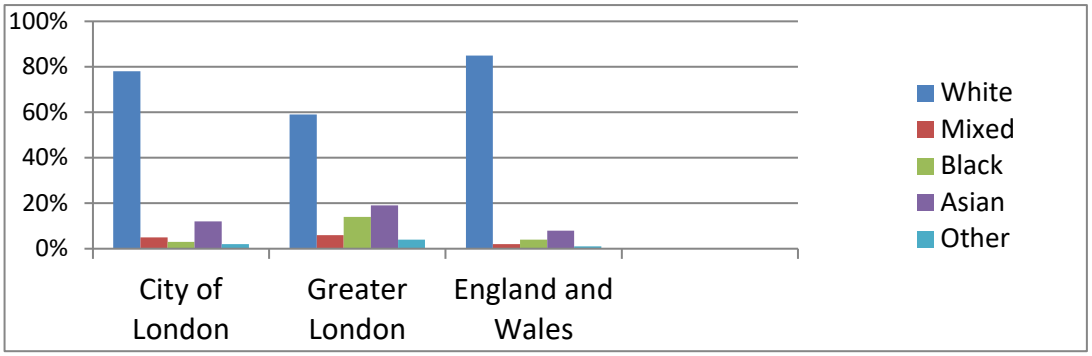


Figure 6: Ethnicity of resident population in the City of London compared to Greater London and England and Wales (source: 2011 Census)

Household Structure

3.9. At the time of the 2011 Census, the City had a large percentage of one person households (58%), as well as a high percentage of households without children (80%). This trend (since 1991) contrasts with Greater London (55%) and England and Wales (63%)

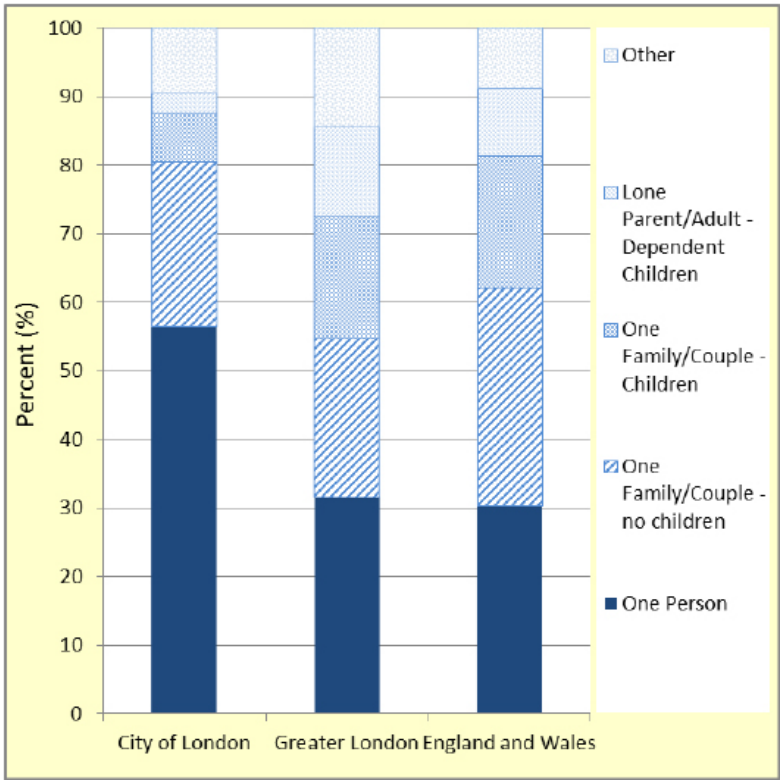


Figure 7: Household composition in the City of London compared to Greater London and England and Wales (source: 2011 Census)

Context and baseline - health

3.10. Most City residents consider themselves to be in good or very good health (88% of all residents). However, around one in eight households (12.5%) contain someone with a disability or long-term health problem. This figure is lower than in London or elsewhere nationally, but there are variations in health between neighbourhoods, reflecting the patterns of relative social and economic deprivation in the City. Poor health is more prevalent in the Portsoken and Golden Lane areas, where ill health and disability affect around 20% of households.

3.11. It can be inferred that the general health of the City of London residents has improved through three factors:

- The percentage of "good health" has risen from 74% in 2001 to 88% in 2011. Furthermore, 56% describe themselves as being in "very good health".

- The percentage of bad health has decreased from 7% in 2001 to 3% in 2011.

- The percentage of fair health has decreased from 19% in 2001 to 7% in 2011.

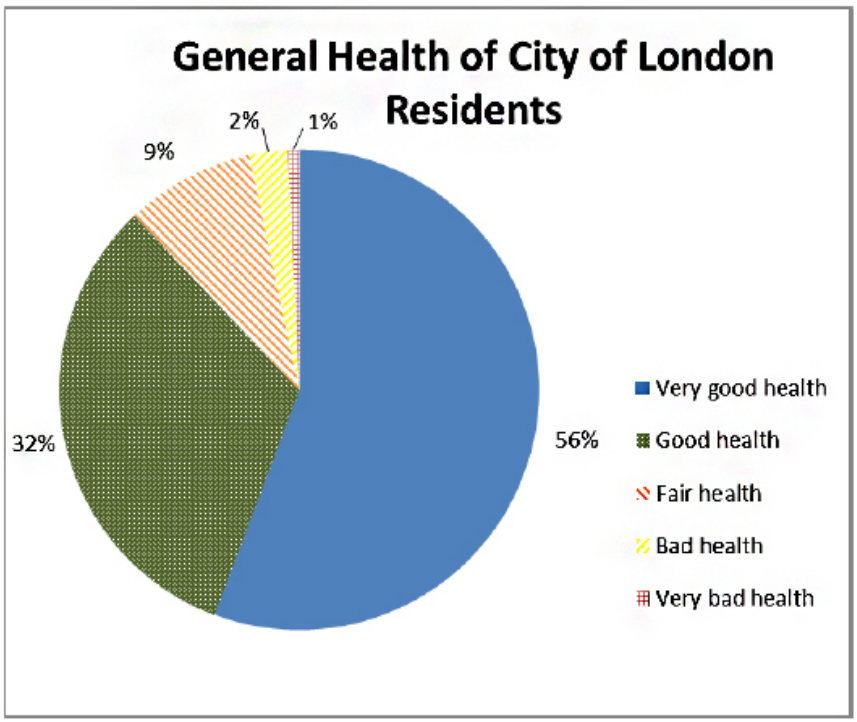


Figure 8: City of London resident's Perception of Health (source: 2011 Census)

3.12. Most City workers (62%) perceived themselves as having 'very good health', which is a higher figure than the London average of 51%. This perception is consistent with the findings from a 2012 independent survey 'The Public Health and Primary Healthcare Needs of City workers'. It is most likely related to City workers' relatively young demographic profile, together with their relatively higher incomes which is generally associated with better health outcomes.

3.13. Data from a 2017 Public Health England Profile of the City of London advises that the City's residential population still enjoys better than average health, although due to the small population indicators have a large margin of error and should be used with caution. Male life expectancy at birth was 86.1 years, which was 6.8 years higher than the England average. Female life expectancy at birth was 89.0 years, which was 6.0 years higher than for

England. Adverse health outcomes such as excess weight, low fruit and vegetable consumption and hospital admissions for alcohol admissions were all lower than the national average. However, new STI diagnoses were higher than nationally, and the City had a higher proportion of mortality attributable to particulate air pollution (7.0%) than London (5.6%) and England (4.7%).

Progress against previous SA objectives – health:

Objective: To improve the health of City workers, residents and visitors

- In the 2001 census 74% of City residents assessed their perception of their own health as "Good" with 19% reporting "Fairly Good" health. 13% of residents reported having a limited long-term illness.
- The City and Hackney Joint Strategic Needs Assessment (City Supplement) identified that in 2011 "Most City residents consider themselves to be in good or very good health (88% of all residents). However, around one in eight households (12.5%) contain someone with a disability or long-term health problem."
- Reporting categories changed between the 2001 and the 2011 Census, therefore it is not possible to make direct comparisons. However, residents' perception of their health remained better than the London and national averages and updated 2017 figures demonstate that the City's health continues to be better than comparable areas.

Commentary

Local Plan social infrastructure policies which protect health facilities, working in partnership with neighbouring authorities to provide facilities outside the City, may have contributed to the retention of a relatively healthy population. The Local Plan's general approach to encouraging healthy lifestyles, tackling air pollution and safety and security reinforces this trend.

Likely evolution without a revised Local Plan

The health of City residents is likely to remain above average since the City is a relatively affluent area with easy access to health facilities. Positive policies in the existing NPPF, London Plan and the adopted Local Plan which enable healthy lifestyles should bring health benefits for residents and workers. With no further action on air pollution beyond the existing Local Plan approach, air quality may not improve as quickly or significantly.

Context and baseline - education and qualifications

3.14. City workers and residents generally report high levels of educational qualification. Trends over the last seven years indicate the number of primary and secondary school applications have remained consistent. There are no maintained secondary schools in the City; therefore, all applications are made to schools in other boroughs. The City Academy Hackney, City of London Academy Islington and City of London Academy in Southwark are sponsored by the City Corporation.

3.15. Two thirds of City workers report having level 4 (degree level) or above qualifications compared with the London average of around 40%. This reflects the demands of City employers for a highly skilled professional workforce where the entry level qualification is a university degree. The qualifications levels are based on the Qualification and Credit Framework where level 4 and above is obtained at university level and includes certificates of higher education through to doctorate degrees. The greater proportion of level 4 qualifications is consistent with the representative work sectors traditionally seen in the City - that is, mainly of the financial and insurance sector (37%) and the associated professional services (18%), which require a level of higher education.[1]

3.16. City residents also report qualification levels above the London and national average.

Area Name	All Residents (16+)	No qualification	Highest Level of Qualification: Level 1	Highest level of qualification: Level 2	Highest level of qualification: Level 3	Highest level of qualification: Level 4	Highest Level of Qualification: Other	Highest Level of Qualification: Apprenticeship
City of London	6,755 persons	6.7%	4.3%	6.6%	7.2%	68.4	6.2%	0.7%
Greater London	5,549,173 persons	17.6%	10.7%	11.8%	10.5%	37.7%	10%	1.6%

Figure 9: Level of Education in City of London residents in comparison to Greater London (source: 2011 Census)

[1] Health and wellbeing board – worker health update Jan 2016

Level 1: 1+ 'O' Level passes; 1+ CSE/GSE any grades; NVQ level1; Foundation GNVQ

Level 2: 5+ 'O' level passes; 5 +CSEs (grade 1's); 5+ GCSEs (Grades A-C); School Certificate; 1+A Levels/ AS Levels; NVQ level 2; Intermediate GNVQ

Level 3: 2 + 'A' Levels; 4+ AS levels; Higher School Certificate; NVQ level 3; Advanced GNVQ

Level 4/5: First degree; Higher Degree; NVQ levels 4 and 5; HND; Qualified Teacher status; Qualified Medical Doctor

Progress against previous SA objective – education:

Objective: Improve the education and skills of the working and residential population

- In 2001, 60% of City residents achieved level 4/5 qualifications. In 2011, 68% of residents achieved degree level qualifications or above. This represents a moderate increase in educational attainment for City residents.
- Data is not available regarding qualification levels of City workers in 2001. In the 2011 census two-thirds of City workers reported having at least level 4 qualifications, which exceeds the London average by 27%.
- This greater proportion of level 4 qualifications is consistent with the work sectors traditionally seen in the City, such as the financial and insurance sector and associated professional services, which require a level of higher education.

Commentary

Educational qualification levels amongst City residents improved in the 10 years 2001- 2011 and the City continues to attract workers with high levels of educational attainment. This is supported by the Local Plan approach of providing educational facilities for all stages of educational need. For secondary school needs this includes the provision of educational facilities in partnership with neighbouring boroughs where appropriate.

Likely evolution without a revised Local Plan

The City is likely to continue to enjoy a higher than average level of educational attainment in the resident and working population, with high levels of professional qualifications. Changes in the balance of jobs in the financial services, legal, accounting and technology, media and telecommunications sectors are unlikely to alter this high skills profile.

Context and baseline - workplace population

3.17. The City's residential base remains relatively small and the majority of people present in the City during the daytime are workers and visitors. There are a range of data sources for analysing employment. The Business Register and Employment Survey (BRES) is a count of employment registration that enables an annual review of employment trends analysed by industrial sector. An alternative data source is the decennial Census which enables a detailed analysis of the characteristics of the workforce.

3.18. BRES data shows a steady increase in total employment in the City from approximately 332,000 in 2009 to approximately 522,000 in 2018, with employment increasing every year in that period except 2013 (see Figure 10). Employment in the City accounts for 10% of London's workforce and 1 in 59 of all British workers.

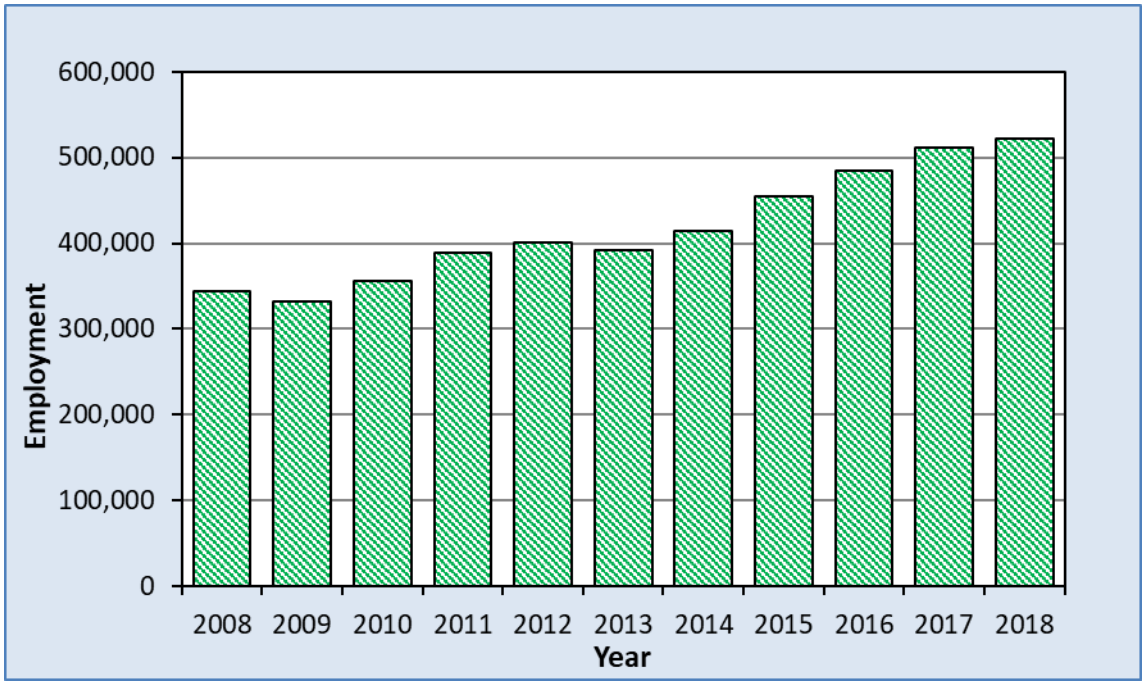


Figure 10: Employment in the City of London 2008-2018 (Source: BRES)

3.19. For comparison, in 2011 there was a difference of 25,700 between employment recorded from BRES (382,700) to that of the workforce from the Census of Population (357,000). A possible explanation for this difference is that for administrative purposes a business may report individual elements of its employment in the central offices or headquarters of its organisation located in the City of London rather than where the employment is physically located.

Gender of City Workforce

3.20. Between the 2001 Census and the 2011 Census, the proportion of men in the City's workforce rose slightly from 29% to 61%, with a corresponding decline in the proportion of female workers from 41% to 39%.

Age Structure of City Workforce

3.21. It can be inferred from the Census in 2001 and 2011 that the age band of 30-39 years old is the most concentrated, a trend that looks set to continue. Since 1991, the number of City workers in the 30 to 39 age range has increased significantly, rising by 91%, while the proportion of workers in this age bracket has risen from 27% to 36%. Similarly, the number of workers in the 40 to 49 age range has increased by 80%, and the respective proportion of the workforce has risen from 18% to 23%. The absolute number of workers under the age of 30 has remained relatively stable from

1991 to 2011, but they remain a key age group in the City, with 20 to 29-year olds accounting for a quarter (26%) of the total workforce.

3.22. Comparison of the age structure of the working population between 1991 and 2011 shows a shift towards a slightly older workforce with decreases in the percentage of workers in the 16-19 and 20-29 age groups and increased percentages in the over 40 age bands. However, over 60% of the City's workforce was still under the age of 40.

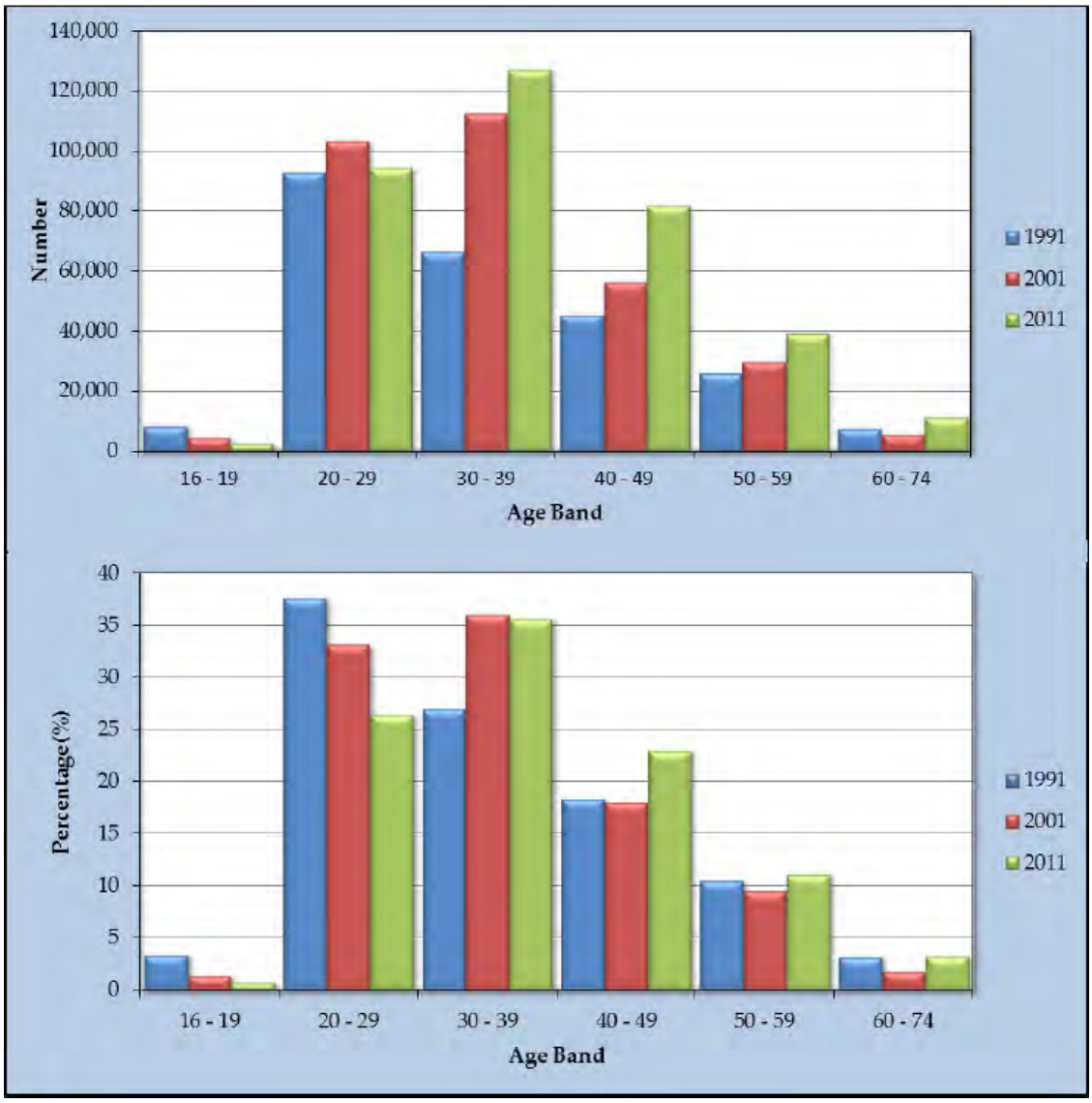
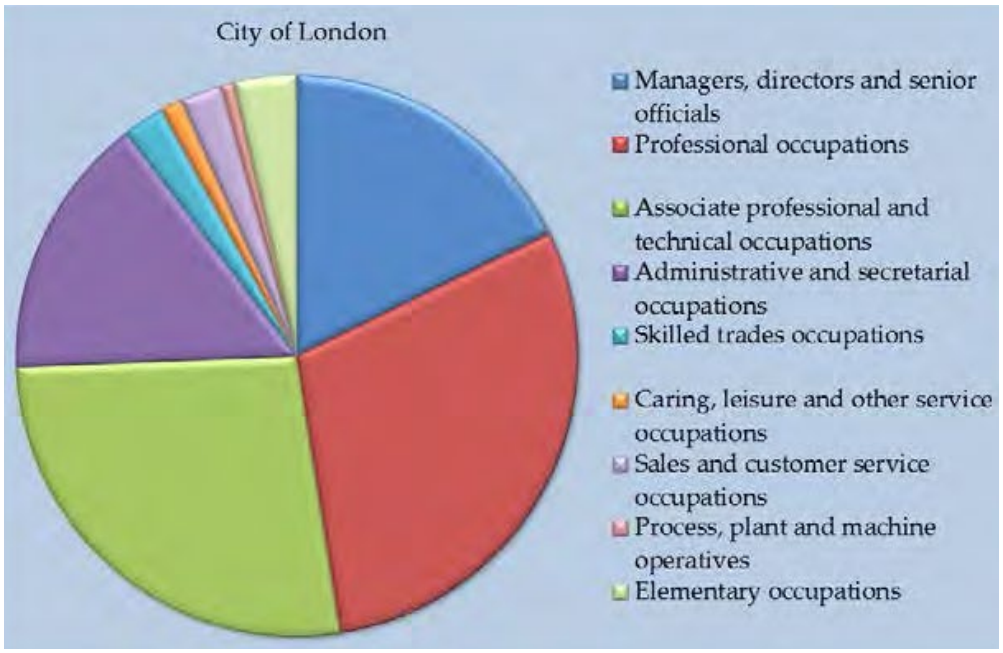


Figure 11: Change in age structure - City workers 1991-2011 (Source: 2011 Census)

Socio- Economic Grouping of City Workforce

3.23. Professional occupations form the largest sector of the City of London workforce (30%), closely followed by associate professional and technical occupations (27%) with managers, directors and senior officials the third largest sector (18%). This is the same hierarchy as the Greater London

workforce, but the percentage of the workforce within each of these sectors is significantly smaller for Greater London (23%, 17% and 13% respectively).



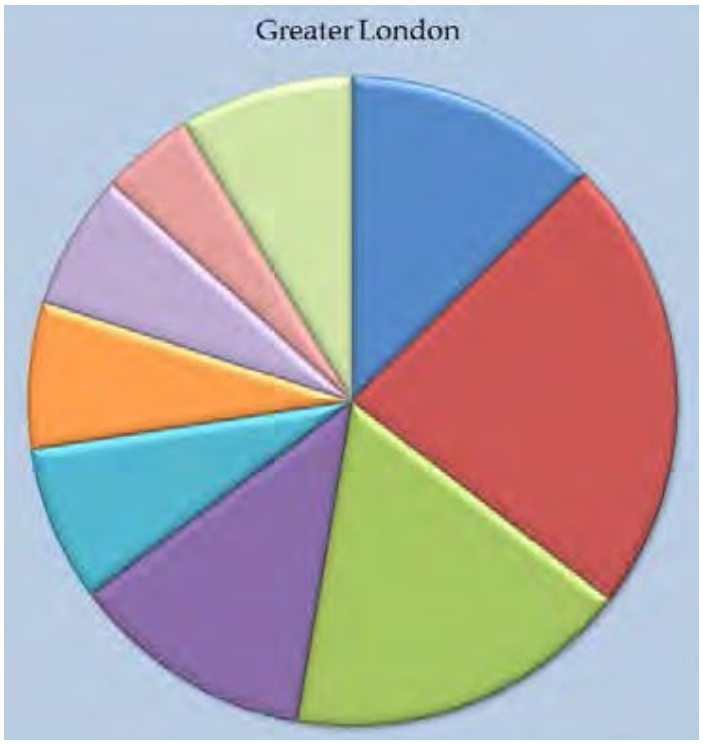


Figure 12: Workforce Occupations in the City of London and Greater London (source: 2011 Census)

Progress against previous SA objective – equality and accessibility:

Objective: Improve equality and accessibility for all

- Census data shows that the proportion of males working in the City is higher than females. This balance has fluctuated slightly over the period from 1991 (60% male 40% female), 2001 (59% male 41% female), and 2011 (61% male 39% female).

- The City's workforce continues to be dominated by younger workers although the proportion of workers in the over 40 age bands has increased between 2001 and 2011.

Commentary

Equality Impact Assessment is carried out on the Local Plan policies to ensure that they do not discriminate between different groups of people, foster good relations within the community and advance equality of opportunity.

Likely evolution without a revised Local Plan

The City's workforce is likely to continue to be dominated by younger workers. Changing work styles and economic uncertainty COVID-19 and the UK's departure from the EU could influence access to City jobs for some individuals. It is uncertain what types of workspace will be required to ensure equal access to jobs under new economic conditions and ways of working.

Industrial Sectors of City Workforce

3.24. Figure 13 shows a breakdown of employment by sector in the City of London.

Industrial Sector	Total	%
Manufacturing & Construction/Wholesale & Retail/Transportation & Storage	36,575	7%
Accommodation & Food Services	20,900	4
Information & Communication	47,025	9
Financial & Insurance	177,650	34
Professional & Estate	141,075	27
Administrative & Education	99,275	19
Total	522,500	100

Figure 13: Employment by industrial sector in the City of London 2018 (source: BRES)

3.25. While the Financial and Insurance sector remains the single largest sector in the City, the relative dominance of this sector has declined from 48% of all City employment in 2001 to 34% in 2018.

3.26. The distribution of employment in the City demonstrates a tendency for clustering of particular employment sectors, with a noticeable distinction between the dominance of professional and estate occupations in the west of the City compared to financial occupations in the east and central parts of the City. Figure 14 illustrates the employment in each industrial sector in the City of London based upon 2018 BEIS data.

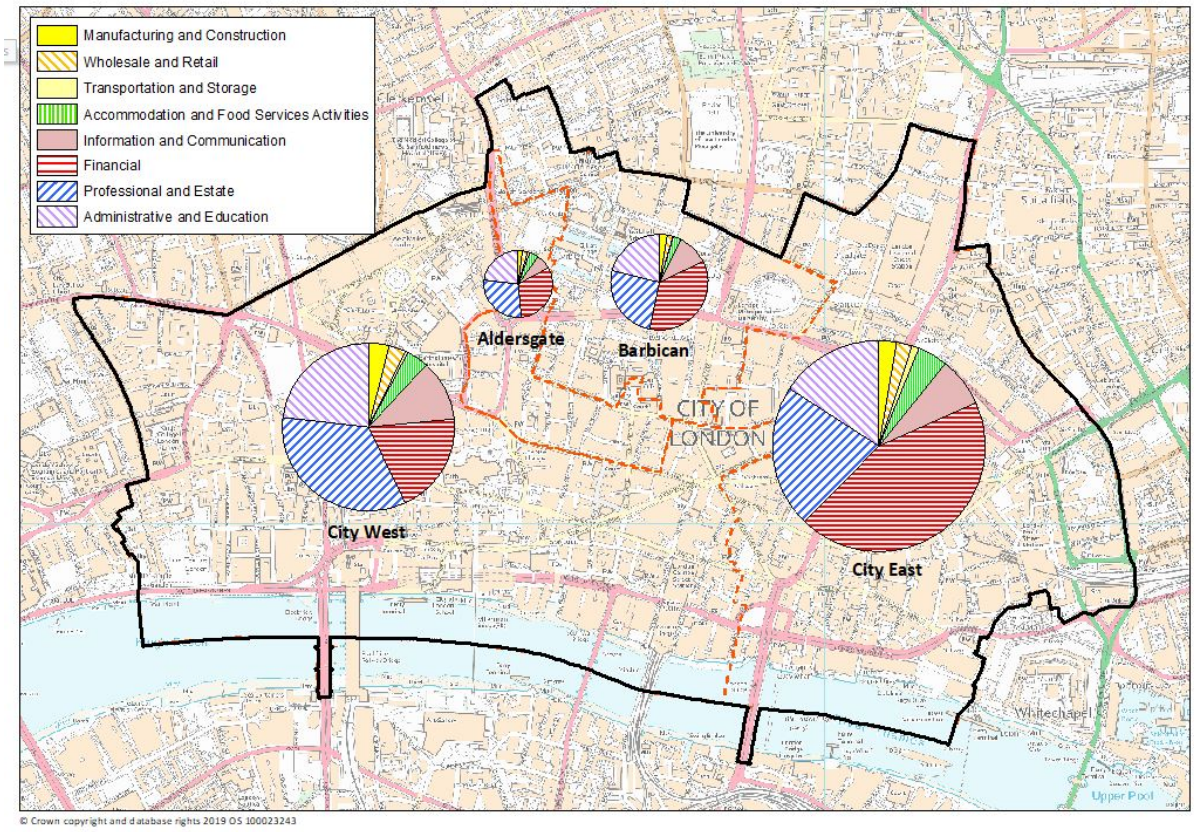


Figure 14: Employment sector distribution in the City of London 2018

Progress against previous SA objective – employment:

Objective: Increase opportunities for rewarding employment in the City of London

- Employment numbers in the City stood at 331,900 in 2009, growing steadily to 522,500 in 2018.

- Analysis of the different employment sectors in the City shows a range of different occupations with 178,400 or 34% of the City's workforce in financial and insurance services, 138,500 or 27% in professional and estates, and 97,700 or 19% in administrative and education.

Commentary

The Local Plan's primary objective of maintaining the City's position as a world leading international financial and business centre contributes to the SA objective of increasing opportunities for rewarding employment in the City. This includes employment in a wide range of supporting roles. The overall trend in employment numbers is increasing.

Likely evolution without a revised Local Plan

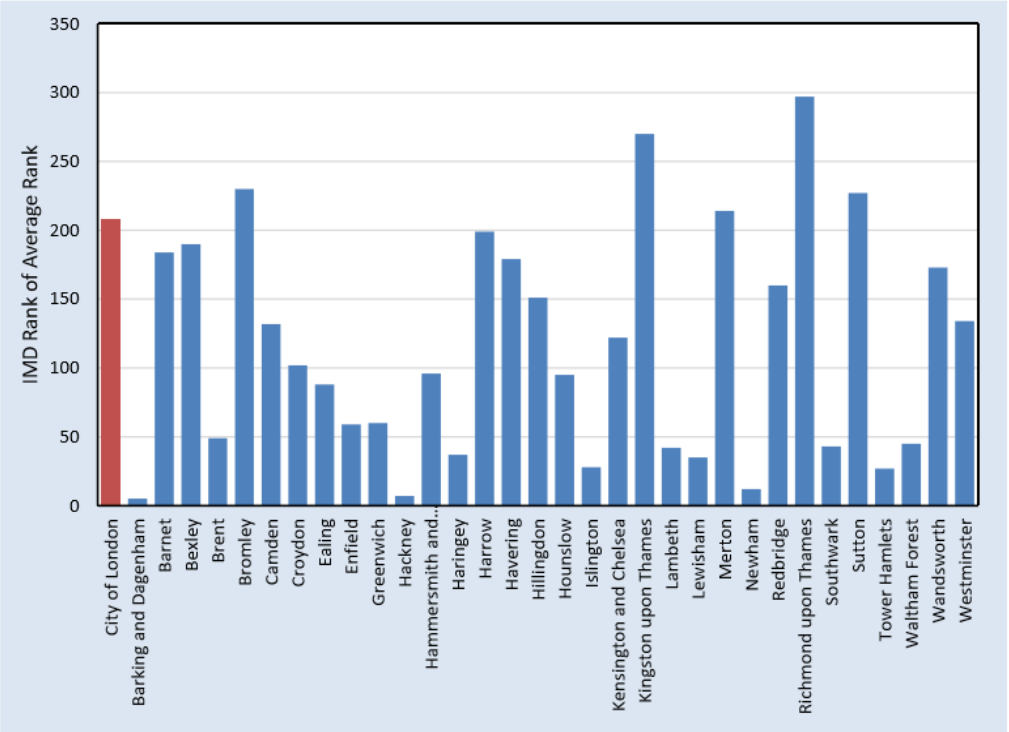
GLA employment projections (published June 2016) predict continued employment growth in the City throughout the period to 2041. It is unclear what impact COVID-19 or the UK's departure from the EU will have on employment numbers or sectors in the City in the short to medium term. Monitoring against the Local Plan floorspace targets will provide essential information on future trends.

Context and baseline - deprivation

3.27. The image of the City is as a privileged place based on its workforce and resident population, but it is surrounded by less affluent areas some of which have high levels of deprivation. The City can be a catalyst for improvements in surrounding areas through the provision of local jobs, skills transfer to surrounding areas and development of affordable housing in areas adjacent to the City.

3.28. As shown in Figure 15 below, the City of London is a relatively affluent district; it is ranked 208 out of the 318 Local Authorities in England (where 1=most deprived). Thus, the City is within the 40% least deprived Local Authorities in England and is the sixth least deprived in Greater London.

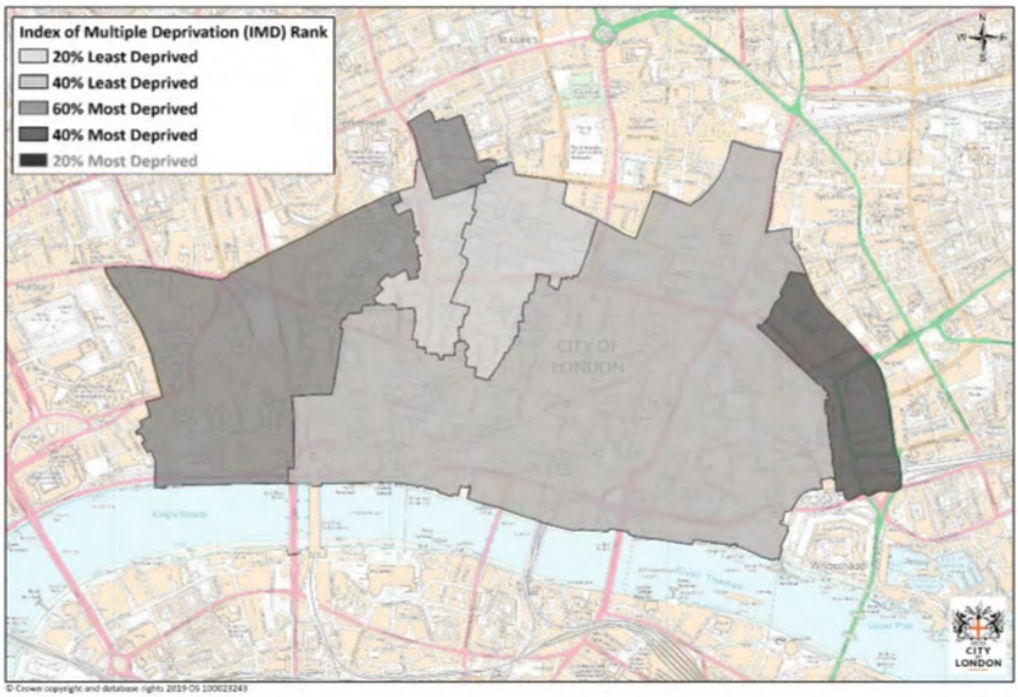
3.29. However, there are disparities within the Square Mile. Figure 16 illustrates that there are two Lower-level Super Output Area (LSOAs) in the City that are within the 20% least deprived in England; these are the Barbican East and Barbican West. In contrast, the Mansell Street & Petticoat Lane LSOA is the most deprived in the City and falls into the 40% most deprived in England.



Graph 1: Rank of Average Rank for London Boroughs

Source: Indices of Deprivation, Source: Ministry of Housing, Communities and Local Government, Crown Copyright, 2019

Figure 15: Index of Multiple Deprivation – City and London boroughs 2019



Map 3: Rank of IMD Quintile, City of London

Source: Indices of Deprivation, Source: Ministry of Housing, Communities and Local Government, Crown Copyright, 2019

Figure 16: Map showing distribution of deprivation within the City of London 2019

Progress against previous SA objective - deprivation:

Objective: Reduce poverty and promote social inclusion in and around the City

- The index of multiple deprivation shows that the City of London is relatively affluent compared to neighbouring boroughs and to London as a whole, but there are disparities with pockets of deprivation in the City.
- The City provides increasing employment opportunities for residents of these neighbouring boroughs, contributing to their economic prosperity. The number of people travelling less than 5km to work in the City has increased from 7 % of the workforce in 1991 to 13% in 2011.

Commentary

The Local Plan's approach to maintaining the City as a global financial and business centre, providing a range of job opportunities, may have contributed to a relative reduction in levels of deprivation in surrounding boroughs, although this is impossible to quantify. The City Corporation's provision and management of social housing in neighbouring boroughs may also have made a contribution. Policies which encourage walking and cycling will contribute to low cost access to jobs for neighbouring boroughs' residents.

Likely evolution without a revised Local Plan

Deprivation levels may be sensitive to economic fluctuations as a result of the COVID-19 pandemic and the UK's departure from the EU. Local training, skills and job brokerage activities funded by development in the City will continue to provide opportunities and benefits for local communities inside and outside of the City. Changes in national legislation and policies relating to planning and housing could reduce the supply of new rented affordable housing funded by development in the City.

Context and baseline - crime

3.30. Crime statistics for the City differ from those in other areas due to the low resident population and high numbers of people working and visiting the City daily. Comparisons with other areas are inappropriate as national crime statistics are quoted as rates per resident. The City of London Police publishes crime statistics on their website.

3.31. Overall crime levels in the City rose modestly between the first quarter of 2018 and the last quarter of 2019, but fell sharply during 2020. Since this coincided with the COVID-19 pandemic, this may only be a short-term reduction and no meaningful conclusions can be drawn until lockdown restrictions are fully lifted.

3.32. Figure 17 shows a summary of the data for 2019, which is a more 'typical' year than 2020.

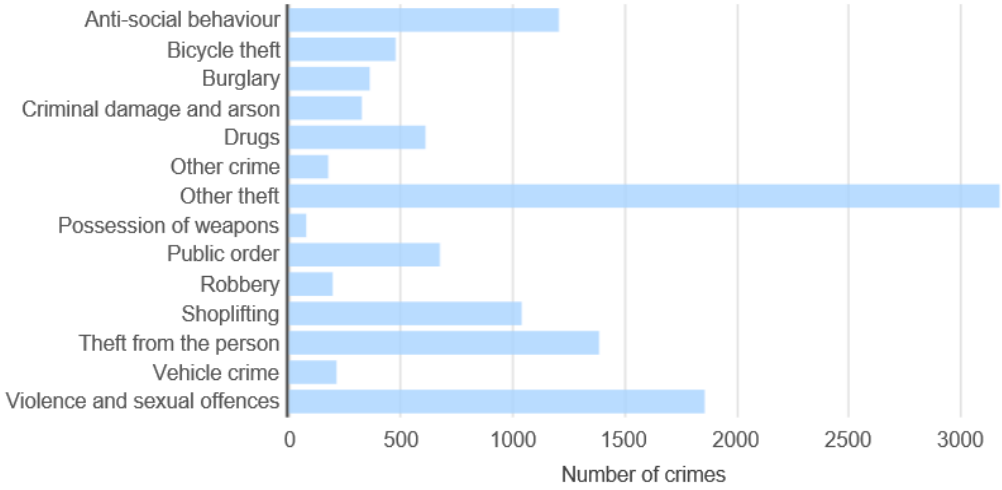


Figure 17: Crime Statistics for the City of London 2019

Progress against previous SA objective – crime:

Objective: Tackle anti-social behaviour

- Due to changes in the way crimes are categorised it is not possible to compare trends in this document but trends for most crimes in the City show an overall decrease since 2011, albeit there was a modest increase during 2018 and 2019. The increase in night-time activity premises in recent years has meant crime associated with anti-social behaviour has increased.

Commentary

There are many factors that affect crime rates and it is difficult to assess the impact of planning policies on overall levels of crime or specific types of crime. Local Plan policy on security and safety, which influences the design of buildings and the public realm, contributes to crime prevention through measures such as passive surveillance and hostile vehicle mitigation. A specific development management policy relating to night-time entertainment was adopted in 2015.

Likely evolution without a revised Local Plan

Adopted planning and licensing policies should help to mitigate anti-social behaviour associated with the night-time economy. Increased pedestrian densities resulting from expansion of the City's workforce and higher visitor numbers could increase opportunities for pick pocketing and other petty crimes.

4. Soil and Water

Context and baseline - contaminated land

4.1. Part 2A of the Environmental Protection Act 1990 and the Contaminated Land (England) Regulations 2006 provide the legal framework for the management of contaminated land. Defra published further guidance in 2012 elaborating on the remediation provisions of Part 2A. The City of London published its Contaminated Land Inspection Strategy for 2015 – 2020 in November 2015. The priorities of this strategy are to:

- Protect human health
- Protect controlled waters
- Protect designated ecosystems
- Prevent damage to property
- Prevent further contamination of land

4.2. This strategy includes: -

- aims, objectives and priorities, taking into account the characteristics of the city of London's area;

- Description of relevant aspects of the City of London;

- Approach to 'strategic inspection', 'detailed inspection' and remediation activity of the City/or parts;

- Approach under Part 2A so that sites do not become capable of being 'contaminated land' in the future;

- how to minimise unnecessary burdens on the taxpayer, businesses and individuals.

4.3. This strategy states that the high concentration of buildings and hard cover in the City means that direct contact with soil and inhalation of soil dust pathways will be largely interrupted. It is considered that contamination will have been removed as a result of the development management process (to form basements etc) thus interrupting the contaminant-pathway-receptor model. However, ground associated with bomb damage and use of backfill means residual issues could remain, providing opportunity for further inspection.

Progress against previous SA objective – contaminated land:

Objective: To ensure that the City is a safe and pleasant place to live and work

- Investigation of development sites to ensure that the City remains free from contaminated land contributes to keeping the City a safe place to live and work.
- The 2015 contaminated land inspection strategy outlines a strategic inspection of the City to identify potentially contaminated sites, sensitive receptors, potential contaminant-pathway-receptor and risk and procedure for detailed inspection.

Commentary

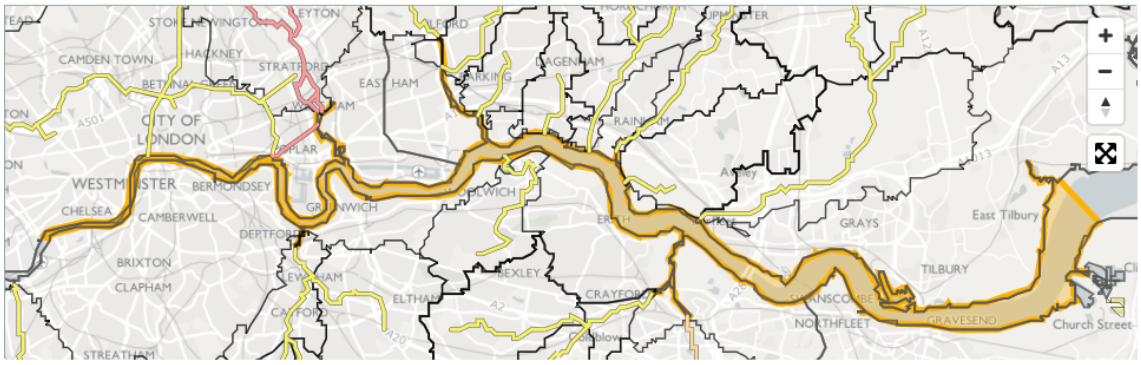
Local Plan policy must continue to promote investigation of the potential for land contamination identifying pathways between sources and receptors.

Likely evolution without a revised Local Plan

The processes and procedures that are currently in place should ensure that the City continues to remain free from contaminated land.

Context and baseline – water quality

4.4. The Water Framework Directive sets a target of aiming to achieve at least 'good status' in all water bodies by 2015. However, provided that certain conditions are satisfied, in some cases the achievement of good status may be delayed until 2021 or 2027. The water quality in the River Thames is in danger of failing to meet these EU targets, partly due to the periodic discharge of sewer outflows into the river during heavy rainstorms. The City of London area falls within the Tidal Thames operational catchment where the Environment Agency's 'Thames Middle' water body water quality data is the most relevant (Figure 18).



THAMES MIDDLE

Download Water Body as CSV / GeoJSON

Overview

Overall classification for 2019
Moderate

Id	GB530603911402
Type	Transitional Water
Hydromorphological designation	heavily modified
NGR	TQ3295080508
Surface area	4391.806 ha
Surface area	43.918 km2
Surveillance Water Body	Yes

Classifications

Cycle 2 classifications

Download as CSV

Classification Item	2013	2014	2015	2016	2019
Overall Water Body	Moderate	Moderate	Moderate	Moderate	Moderate
Ecological	Moderate	Moderate	Moderate	Moderate	Moderate
Chemical	Fail	Fail	Good	Fail	Fail

Figure 18: Environment Agency Thames Middle Water Quality Data 2013-2019

Progress against previous SA objectives – water quality:

Objective: Improve water quality and enhance management of the resource

- Environment Agency data shows that there has been no significant change in the water quality in the Thames Middle water-body between 2013 and 2019, with an overall classification of moderate.

Commentary

The Local Plan supports the construction of the Thames Tideway Tunnel completion of which, in 2025, should result in a significant improvement in river water quality in the Thames, including in the City where the Blackfriars Combined Sewer Outflow will cease to discharge into the river.

Likely evolution without a revised Local Plan

The water quality in the River Thames should improve when the Thames Tideway Tunnel opens in 2025.

5. Air

Context and baseline - Air Quality

5.1. The City of London, alongside the rest of central London, is an air quality management area for fine particulates (PM10) and nitrogen dioxide (NO2). In the City nitrogen dioxide is continuously monitored at three locations (Beech Street, Walbrook Wharf and The Aldgate School (formerly Sir John Cass School), with diffusion tube monitoring placed at various other locations around the Square Mile.

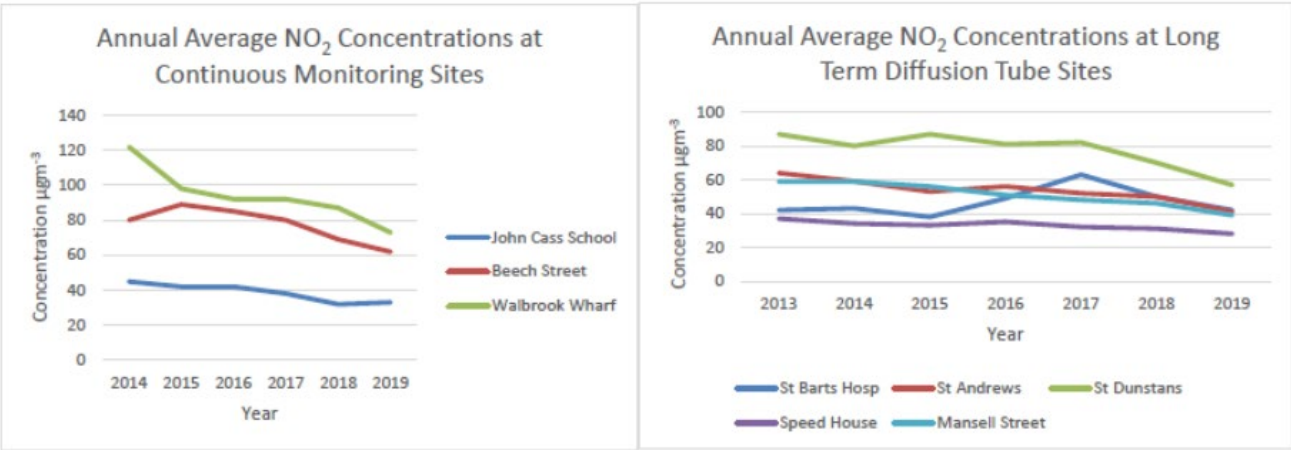


Figure 19: Annual average N0₂ concentrations at monitoring sites 2014-2019

5.2. Since 2013, concentrations of nitrogen dioxide at background sites (away from the direct influence of traffic) have been gradually decreasing. Figure 19 shows the trends during this period at the three continuous monitoring sites and at five other sites where diffusion tubes have been placed on a long-term basis. Levels of nitrogen dioxide at The Aldgate School dipped below the annual objective of 40 µg m-3 in 2017, with concentrations now

around 33 µg m-3. The exception to the downward trend is St Bart's Hospital site, which experienced a sharp increase in 2016-17 associated with the installation of a new energy centre. Work has been undertaken to rectify this issue and concentrations are declining again. Roadside concentrations of nitrogen dioxide saw significant falls across nearly all City sites in 2019.

5.3. Fine Particulate Matter (PM 10) is monitored in the City at Beech Street, Upper Thames Street and at the Aldgate School. Figure 20 shows trends in PM10 concentrations from 2012 to 2019. Annual average concentrations of PM10 meet the Limit Value of 40 µg/m³ at all monitoring sites. Since 2007, the Limit Value has only been breached once in Upper Thames Street. This is thought to be associated with the construction of the cycle superhighway. Although the Limit Value is met, the World Health Organisation Guideline for PM10 level of 20 µg/m³ as an annual average has generally been breached at all sites, although it did fall below that level at The Aldgate School in 2019.

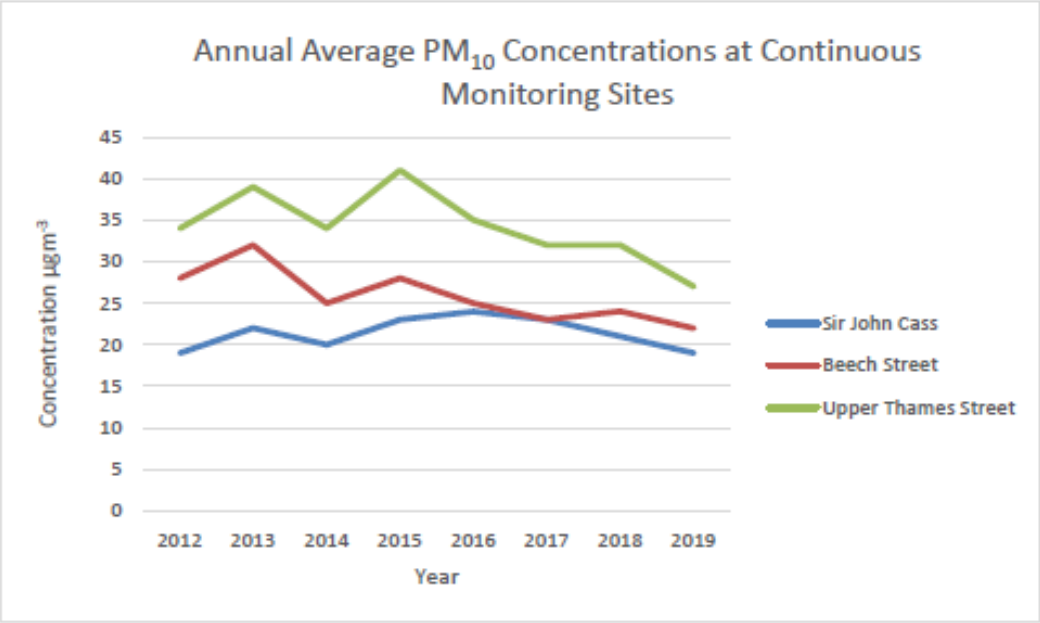


Figure 20: Annual average PM_{10} concentrations at monitoring sites 2012-2019

5.4. PM2.5 is measured in Farringdon Street and at The Aldgate Primary School. Figure 21 shows the annual average PM2.5 concentrations at Farringdon Street since 2013 and at The Aldgate School since 2016. The results indicate that PM2.5 meets the Limit Value of 25 µg/m³ at these two locations, with a significant decline in concentrations at Farringdon Street between 2013 and 2016. However, concentrations are above the WHO Guideline, which is set at 10µg/m³. Like with PM10, there is little that can be done by the City

Corporation in isolation that will have a significant impact on concentrations of this pollutant.

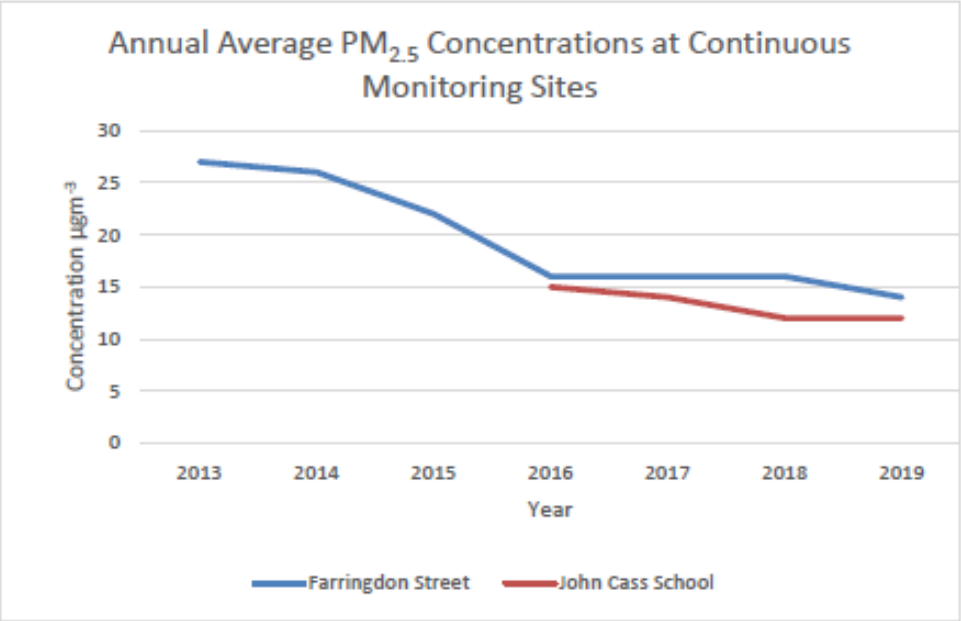


Figure 21: Annual average $PM_{2.5}$ concentrations at monitoring sites 2013-2019

<u>Other Pollutants</u>

5.5. Carbon Monoxide, sulphur dioxide, lead, 1.3 Butadiene and benzene concentrations in the City are low and continue to comply with the air quality objectives set for these pollutants.

Progress against previous SA objective – air quality:

Objective: Improve air quality

- The City is an air quality management area for oxides of nitrogen and fine particulates (PM10). During the period 2014-2019 the air quality objective of 40 µg m-3 (annual average NO_2) was exceeded at most of the sites where it is monitored in the City, although the general trend is that concentrations have been falling during that period.

- Levels of PM10 and PM2.5 have been falling and annual average concentrations meet the relevant limit values at all locations. However, concentrations remain above the relevant WHO guidelines at most sites.

Commentary

Despite the implementation of a wide range of actions by the City Corporation to improve air quality, the health-based limits for nitrogen dioxide are still not met everywhere in the Square Mile. Extensive monitoring, however, demonstrates that levels of nitrogen dioxide are reducing year on year, including at roadside locations more recently. The Local Plan policies may make a contribution to this, but wider measures are necessary since this is a London wide problem.

Likely evolution without a revised Local Plan

Air quality is influenced by a wide variety of factors other than Local Plan policies. Traffic and building works are the major sources of air pollution in the City. Reductions in either of these factors may prompt an improvement in air quality. The City of London is within the Ultra-Low Emission Zone (ULEZ), which came into effect in 2019. An extension to ULEZ up to the North and South Circular in October 2021 may indirectly improve air quality in the City by reducing air pollution across a much wider area of London.

Context and baseline – transport emissions and infrastructure

5.6. The main contributor to local air pollution is road traffic. Diesel vehicles, in particular taxis, buses and vans contribute the largest proportion. Offices make up over 70% of all buildings in the Square Mile and many of the vehicles in the City are servicing business needs. Figure 22 shows modelled concentrations of NO2 across the City for 2020 using data from the 2013 London Atmospheric Emissions Inventory. This shows that concentrations of nitrogen dioxide adjacent to busy roads and junctions can be three times that experienced in the City away from such roads.

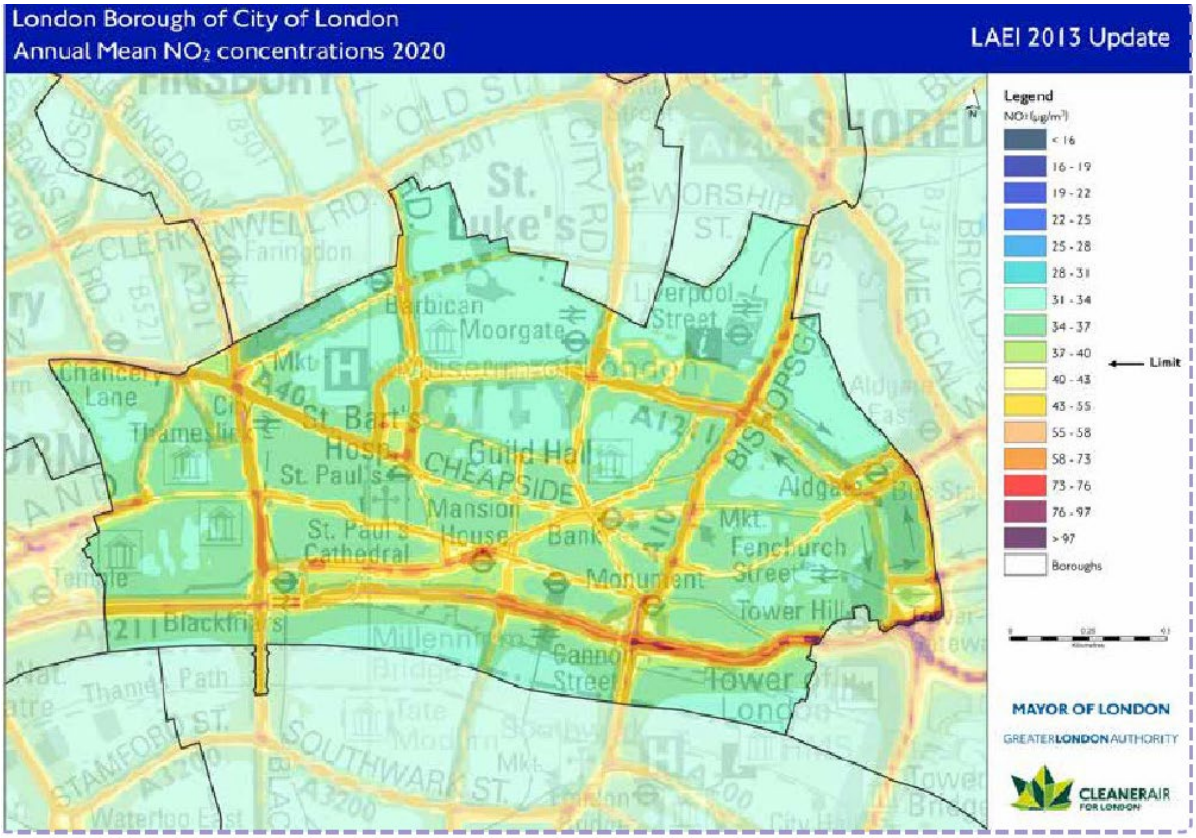


Figure 22: NO_2 concentration modelling for 2020 (pre-pandemic)

5.7. Public transport upgrades, the introduction of cleaner vehicles, the use of the River Thames for transport and encouragement of active transport modes such as walking and cycling, will all make a contribution to reducing air pollution associated with transport in the City. Alongside action to reduce levels of pollutants, it is important to reduce people's exposure to poor air quality. This can be achieved through a number of measures including greening and street tree planting, provision of traffic free routes, and provision of air quality information to enable vulnerable individuals to make informed choices. The London wide nature of this problem requires co-ordination of actions across a wider area. It is important that actions taken within the City or any individual borough do not have unintended consequences elsewhere.

Progress against previous SA objective – transport emissions and infrastructure:

Objective: Reduce the negative effect of transport on the environment

- Numerous highways schemes and environmental enhancement schemes have been carried out in the City during the period from 2012. Street scene enhancement strategies have been published for ten areas of the

City. Many of these aim to improve the street environment making more space for pedestrians and cyclists.

- The implementation of highway and environmental enhancement schemes have contributed to a reduction in people's exposure to poor air quality by widening pavements, creating traffic free environments and using planting to screen open spaces from roads.

- Major strategic transport projects such as Crossrail, Thameslink and the Northern Line/ Bank Station upgrade are progressing and will provide additional public transport capacity to, from and through the City. TfL reported increasing passenger numbers across all public transport modes during the period from 2006-2018.

Commentary

Local Plan policies on planning contributions provide a proportion of the funding for necessary highway and environmental enhancement programmes. It will be important to ensure that future schemes continue to address exposure to poor air quality. Support for major transport infrastructure projects has long been a feature of planning policy in the City.

Likely evolution without a revised Local Plan

Additional public transport capacity will be available with the opening of the Elizabeth Line, although this project has been delayed until 2022, and further capacity will come on stream through the Bank Station upgrade at around the same time. The City of London is within the Ultra-Low Emission Zone, which came into effect in 2019 and is due to be extended in 2021.

6. Climate

Context and baseline - carbon emissions

6.1. Energy consumption and the consequent emissions of carbon dioxide are of significant importance to the City of London and have a contributory impact on climate change. The location, siting, design and construction of built development together with economic and social activities can have an effect on energy consumption and subsequent greenhouse gas emissions and this can be influenced by planning policies for both new and refurbishment of existing development.

6.2. It is important to consider the overall energy consumption and carbon dioxide emissions in the City to see whether the policies that are in place are having a positive effect on longer term trends. Figure 23 shows carbon emission figures for the City of London for 2005 – 2018 and demonstrates that commercial use accounts for the greatest proportion of emissions. Overall carbon emissions in the City have decreased significantly during this period, particularly in more recent years. Total carbon emissions for the City will need to be further reduced to around 600 kT CO_2 per annum to meet the GLA's target of 60% reduction in carbon emissions by 2025.

	Commercial	Domestic	Transport	Total
2005	1547	20	74	1641
2006	1680	20	74	1772
2007	1580	21	73	1672
2008	1604	21	67	1688
2009	1402	20	62	1482
2010	1551	21	62	1639
2011	1317	19	60	1398
2012	1462	21	58	1542
2013	1346	20	58	1424
2014	1073	17	58	1148
2015	961	16	53	1030
2016	794	14	51	859

	Commercial	Domestic	Transport	Total
2017	686	13	51	750
2018	656	12	48.2	717

Figure 23: Trends in carbon emissions (kT CO_2) 2005-2018

Progress against previous SA objective – carbon emissions

Objective: To reduce activities that exacerbate climate change

- After several years of gradual reductions in CO_2 emissions from the City, with annual fluctuations, there has been a significant downward trend since 2012.
- Energy strategies show that many new developments are achieving the London Plan target of a 35% improvement over the 2013 building regulations.

Commentary

Local Plan policy CS15 promotes CO_2 emission reduction. This may have contributed to the trend towards lower carbon emissions from new and refurbished developments in the City. The gradual reduction in CO_2 emissions between 2005 and 2013 corresponded with a period that included a significant recession, while the more significant reductions since then are likely to be associated with decarbonisation of the National Grid. Continued monitoring will establish whether the expansion of floorspace will affect this downward trend.

Likely evolution without a revised Local Plan

A reduction in carbon emissions per square metre of floorspace must be set against overall increases in floorspace in estimating future emissions for the City. Large increases in floorspace that are currently approved may slow down the reduction of emissions, although new buildings are increasingly energy efficient. Strengthening of building regulations, decarbonisation of the grid, stricter vehicle emissions standards and the adoption of stronger sustainability policies in the London Plan will all assist to reduce carbon emissions.

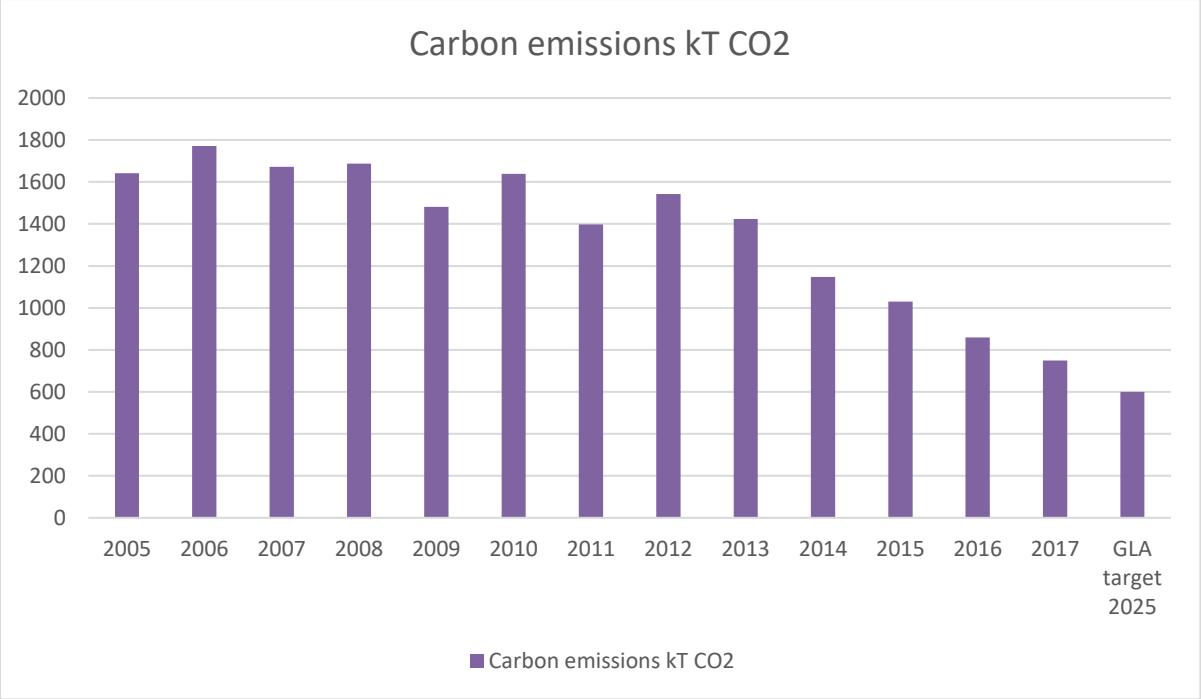


Figure 24: City of London Carbon Emissions 2005-2017

Context and baseline - climate change adaptation and resilience

6.3. Despite efforts to reduce carbon emissions, some level of climate change is now inevitable. The likelihood is that summers will become hotter and drier, winters wetter and warmer and we will experience more frequent extreme weather events. Figure 25 shows the areas of the City that will be

most vulnerable to flooding as a result of climate change.

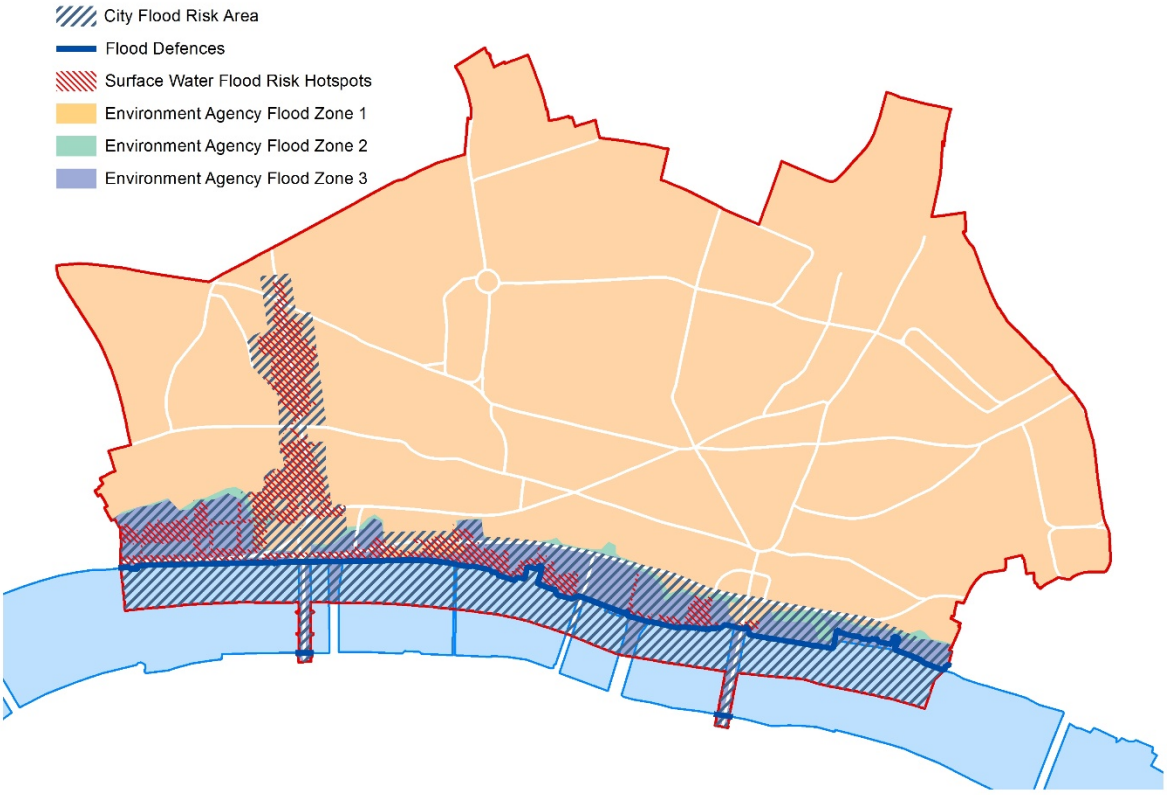


Figure 25: Areas at risk of flooding in the City

6.4. In order to increase the City's resilience to flooding, green roofs and other sustainable drainage features can play a part in slowing down rainwater run-off from buildings reducing the risk of surface water and sewer overflow flooding.

Progress against previous SA objective – climate change adaptation and resilience

Objective: Climate change adaptation

- Comprehensive monitoring of climate change resilience measures has not been carried out. However, some elements such as the inclusion of green roofs in development schemes, which reduce flood risk and over-heating, has been monitored.The City of London has 79 acres of open spaces (pocket parks) and 42,600sq.m of total green roof space. There are currently over 80 green roofs in the City.

Commentary

Flooding, both fluvial due to sea level rise and surface water, and the urban heat island effect are two main issues which could affect the City in the future. Local Plan policies encourage Sustainable Drainage Systems (SuDS) and highlight the need for flood defence raising to combat the effects of sea level rise. Urban greening is also promoted, which will help alleviate overheating.

Likely evolution without a revised Local Plan

More extreme weather events as a result of climate change may result in higher flood risk for the City, which is vulnerable to sewer surcharge flooding in some locations, during periods of heavy rainfall. Implementation of SuDS schemes may have a beneficial effect in the longer term.

7. Material Assets

Context and baseline – economic development

7.1. Offices are the predominant City land use. It was estimated that as at 31st March 2020 there was 9,305,000 million m^2 of gross office floor-space within the City (Office Floorspace in the City of London, period ending 31st March 2020). Other main land uses are transport, open space, housing, retailing, utilities, public buildings, hotels and visitor attractions, education and health. The type of companies occupying City office space has changed over time. Financial services and professional services remain the two largest sectors in the City overall. 10% of Greater London's employment or 1 in 59 of GB's workforce are employed in the City.[2]

7.2. Office stock in the City is continually updated to accommodate the City's growth projections and to accommodate businesses' technological requirements, ensuring that it remains at the competitive edge. Whilst there are pockets of residential areas in the City where additional housing is proposed to contribute towards housing needs, this will be managed to ensure that the City forms a business cluster of commercial office space of national importance.

7.3. The COVID-19 pandemic has had a significant economic impact in 2020, but London's economy is forecast to recover strongly in 2022 once a vaccination programme has been completed. The forecast employment for 2021 and 2022 in London's key sectors is detailed in Figure 26.

Sector	2020 % change	2021 % change	2022 % change
Financial and Business Services employment	-1.1	-5.0	3.4
Distribution, Accommodation and Food Service Activities employment	-3.2	-5.5	3.5
Transportation and Storage employment	-6.1	-5.3	3.4
Other (public and private) Services employment	1.7	-2.9	1.9
Manufacturing employment	2.3	-6.0	2.9
Construction employment	-6.5	-6.4	3.3
Non-manufacturing employment	-1.2	-4.6	3.0

Figure 26: GLA Economics Forecast for London's key employment sectors.

[2] City of London Corporation City Statistics Briefing January 2020

7.4. Data presented in Figure 26 relates to London's key employment sectors, however the most relevant to the City of London is the financial and business services employment. 2020 witnessed a fall of 1.1% in this sector's employment. It is projected that this trend will continue in 2021 with a drop of another 5% in comparison to the previous year. However, in 2022, it is forecast that financial and business services employment will return to growth of approximately 3.4%.

7.5. In terms of historic and forecast gross value-added outputs by sector the changes are presented in Figure 27 below.

Growth Rates	2010	2018	2019	2020	2021	2022
Gross value added at basic prices (2016 KP)	2.6	2.3	5.1	-9.5	6.2	6.9
Financial and Business Services Output	3.1	3.0	6.6	-5.0	5.5	6.1
Distribution, Accommodation and Food Service Activities Output	0.4	3.9	7.3	-19.4	8.1	10.5
Transportation and Storage Output	0.3	-3.1	-0.5	-19.5	12.0	12.0
Other (public and private) Services Output	0.8	0.9	3.7	-15.3	5.7	5.7
Manufacturing Output	3.3	-3.9	2.5	-11.6	4.8	9.0
Construction Output	12.9	-0.5	0.9	-19.6	9.6	11.9

Figure 27: Historic and forecast growth rates for key sectors in London by output (2010 – 2022).

7.6. Figure 27 presents growth rates of London's key sectors. For the City of London, the most relevant sector is financial and business services. This sector has experienced a drop of 5% in its outputs in 2020, in comparison to its strong 6.6% growth in 2019. However, it is projected that financial and business services outputs will grow by 5.5% in 2021 and by an additional 6.1% in 2022.

Progress against previous SA objectives – economic development:

Objective: Encourage growth in the City's financial and business services
Objective: Maintain and, where appropriate, encourage growth in non-financial economic sectors.

- Employment numbers in the City stood at 331,900 in 2009, growing steadily to 522,500 in 2018.
- In 2018, the City of London contributed around £69 billion in GVA to the UK's national income, which is around 4% of the UK's output and 15% of London's output. City output has risen about 5% per year over the 5 years to 2018, compared to 4% for the UK.
- There were nearly 1,000 new start-ups in the City in 2019, which is slightly more than in 2018.

Commentary

The Local Plan sets a target to increase office floorspace by 1,150,000 m^2 in the City during the period 2011-2026. From 2011/12 – 2016/17 there was a net loss in office space due to high levels of demolitions, however this trend was reversed in 2017/18 and since then there has been a steady increase in office floorspace due to high levels of construction. The City continues to be a dynamic business environment with high levels of start-ups and productivity levels above the national average.

Likely evolution without a revised Local Plan

It is unclear what impact the COVID-19 pandemic and the UK's departure from the EU will have on the City's economic growth, although GLA projections forecast that London's economy including financial and business services are likely to bounce back strongly from the contraction in 2020. Monitoring against the Local Plan floorspace targets will provide essential information on future trends in employment numbers and occupation densities.

Context and baseline – built environment

7.7. The development and refurbishment of the City's built environment is key to ensuring that the City continues to provide the environment where businesses want to operate, and residents want to live. The City Corporation monitors the pipeline of developments from approval to completion and reports on progress every six months through its development and

population information reports which are published on the City of London web site.

7.8. Enhancement of the public realm is important in providing the high-quality environment that is fitting for the world's leading financial and business centre. There are a number of Area Enhancement Strategies for the City, the most recent being the City Cluster Vision and Culture Mile Look and Feel Strategy. Along with the City of London's Transport Strategy, adopted in 2019, they provide the foundation for improvements to streets and spaces in the Square Mile.The Global Financial Centres Index analyses the key factors that make a financial centre competitive. The 2020 rankings of the top five financial centres show that London and New York compete for the highest ranking ahead of Shanghai, Tokyo and Hong Kong (Figure 28).

Centre	GFCI 28 rank	GFCI 28 rating	Change in rating
New York	1	770	+1
London	2	766	+24
Shanghai	3	748	+8
Tokyo	4	747	+6
Hong Kong	5	743	+6

Figure 28: Average Scores of the leading Global Financial Centres in 2020

Progress against previous SA objectives – built environment:

Objective: Protect, maintain and enhance the built environment of the City incorporating sustainable design & construction methods

Objective: Enhance the attractiveness of the City as a business location

Objective: Ensure that the City is a safe and pleasant place to live and work

- Development and environmental enhancement schemes completed since 2006 have maintained a high-quality environment in the City. Development activity has returned to strong levels in recent years after the economic downturn following the 2008 financial crash.

- London has retained its high ranking in the Global Financial Centres Index in recent years with the City contributing significantly to this assessment.

Commentary

Local Plan policies promote renewal of the City's office stock incorporating good design and requiring high BREEAM sustainability ratings. Planning contributions through S106 and CIL enable public realm improvements associated with new development.

Likely evolution without a revised Local Plan

Improvements in the sustainability and attractiveness of the City will be dependent on continued development providing funding for public realm enhancements.

8. Cultural Heritage and Landscape

Context and baseline – heritage assets

8.1. The City contains a high concentration of heritage assets which include over 600 listed buildings, 27 conservation areas, 48 scheduled monuments and 4 historic parks and gardens within the Square Mile. Furthermore, the City provides part of the backdrop and setting for the Tower of London World Heritage Site.

8.2. The City Corporation has published a Historic Environment Strategy and a series of Conservation Area Character Summary and Management Strategies as Supplementary Planning Documents (SPDs). In addition, the City Corporation has published an Archaeology and Development Guidance SPD. The documents are published on the City Corporation's web site.

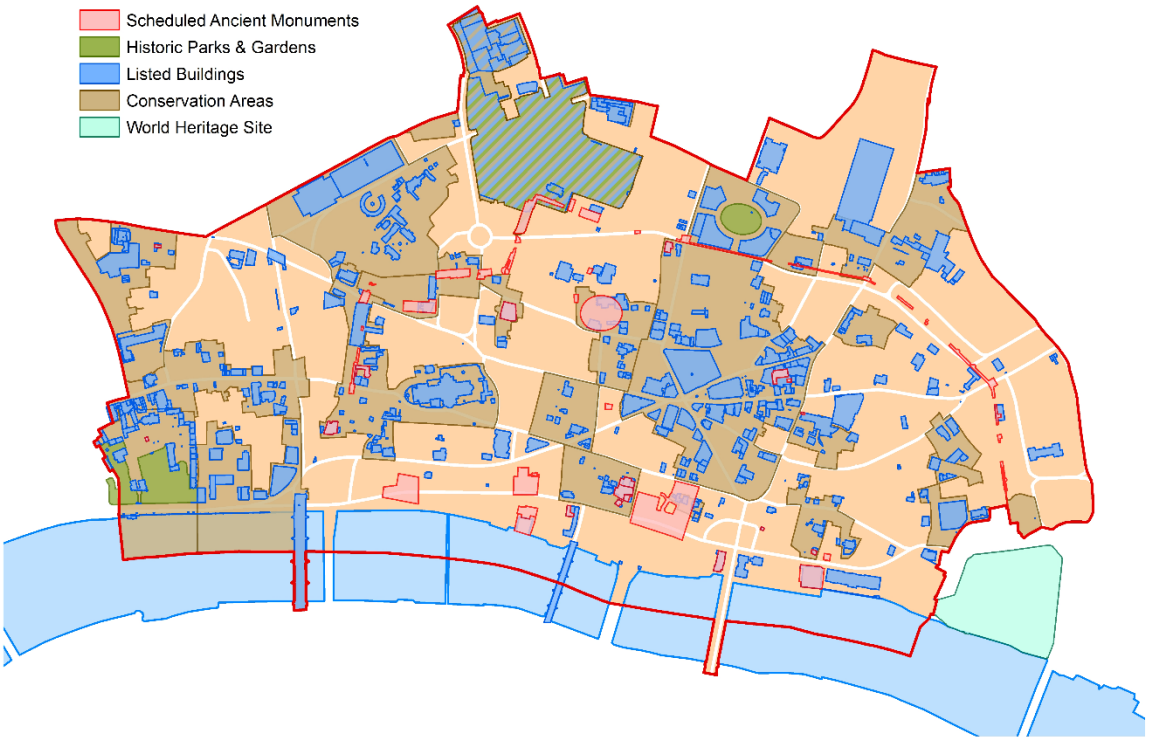


Figure 29: Map showing heritage assets in the City

8.3. Historic England's "Heritage at Risk – London and the South East Register" (2019) lists two buildings and three sections of the London Wall as being at risk:

CITY OF LONDON

© Historic England

SITE NAME:	Church of St Mary Woolnoth, King William Street, City of London EC3
DESIGNATION:	Listed Place of Worship grade I, CA
CONDITION:	Poor
PRIORITY CATEGORY:	C (C)
OWNER TYPE:	Religious organisation
LIST ENTRY NUMBER:	1064620

This church was built between 1716 and 1727 by Nicholas Hawksmoor on a tight site between Lombard Street and King William Street. In 1875-6 William Butterfield raised the chancel floor and removed the galleries, setting the carved fronts against the walls. The west side of the square plan church is dominated by a baroque tower. There is settlement in the tower causing cracks which need to be monitored. Elsewhere asphalt roofing needs to be repaired, along with the nave parapet to Lombard Street.

Contact: Ian Harper 020 7973 3786

© Historic England

SITE NAME:	Church of St Margaret, Lothbury, City of London EC2
DESIGNATION:	Listed Place of Worship grade I, CA
CONDITION:	Poor
PRIORITY CATEGORY:	D (D)
OWNER TYPE:	Religious organisation
LIST ENTRY NUMBER:	1064634

Designed by Sir Christopher Wren, the church was built between1686 and1695. The form is a simple rectangle orientated north-south with a vestry to the east and a tower to the west. Only the south elevation is faced in Portland stone; the others are rendered brick with stone quoins. Internal fittings are contemporary. The spire has been fully repaired in 2018-2019 with a grant from the National Lottery Heritage Fund. However, the nave floor has settled and the leaning tower is being monitored.

Contact: Ian Harper 020 7973 3786

SITE NAME:	London Wall: remains of Roman and medieval wall from west end of All Hallows Church to 38 Camomile Street EC2		
DESIGNATION:	Scheduled Monument, 2 CAs	LIST ENTRY NUMBER:	1002050
CONDITION:	Generally satisfactory but with significant localised problems	TREND:	Declining
PRINCIPAL VULNERABILITY:	Deterioration - in need of management	NEW ENTRY?:	No
OWNER TYPE:	Local authority, multiple owners	CONTACT:	Elizabeth Whitbourn 07889 808145
SITE NAME:	London Wall: section bounding All Hallows Churchyard EC2		
DESIGNATION:	Scheduled Monument, CA	LIST ENTRY NUMBER:	1002067
CONDITION:	Generally satisfactory but with significant localised problems	TREND:	Declining
PRINCIPAL VULNERABILITY:	Deterioration - in need of management	NEW ENTRY?:	No
OWNER TYPE:	Private, multiple owners	CONTACT:	Elizabeth Whitbourn 07889 808145
SITE NAME:	Roman wall in basement of 90 Gracechurch Street EC3		
DESIGNATION:	Scheduled Monument, CA	LIST ENTRY NUMBER:	1002035
CONDITION:	Generally unsatisfactory with major localised problems	TREND:	Declining
PRINCIPAL VULNERABILITY:	Rain entry	NEW ENTRY?:	No
OWNER TYPE:	Local authority	CONTACT:	Elizabeth Whitbourn 07889 808145

PRIORITY CATEGORIES

- A Immediate risk of further rapid deterioration or loss of fabric; no solution agreed.
- B Immediate risk of further rapid deterioration or loss of fabric; solution agreed but not yet implemented.
- C Slow decay; no solution agreed.
- D Slow decay; solution agreed but not yet implemented.
- E Under repair or in fair to good repair, but no user identified; or under threat of vacancy with no obvious new user (applicable only to buildings capable of beneficial use).
- F Repair scheme in progress and (where applicable) end use or user identified; or functionally redundant buildings with new use agreed but not yet implemented.

NOTE

Last year's priority category is shown in brackets (otherwise, New Entry is noted).

ABBREVIATIONS

- CA Conservation Area
- LB Listed Building
- LPA Local Planning Authority
- NP National Park
- RPG Registered Park and Garden
- SM Scheduled Monument
- UA Unitary Authority
- WHS World Heritage Site

Figure 30: Extract from Historic England's Heritage at Risk Register 2019

8.4. Development in the City may have an impact on heritage assets beyond the City's boundaries in the neighbouring boroughs of Tower Hamlets, Islington, Camden, Westminster, Southwark and Lambeth and beyond. Details of these assets can be found on the Historic England web site or through individual borough's web sites. The Tower of London World Heritage site is of particular importance in this context.

8.5. There are several non-designated heritage assets in the City which merit consideration in planning decisions.

Progress against previous SA objective – heritage assets:

Objective: Conserve and enhance the historic and archaeological environment:

- The City aims to ensure protection of the significant features of listed buildings whilst encouraging viable uses for these buildings. Planning permissions have been granted for changes of use of listed buildings to accommodate leisure, residential and hotel uses.
- There has been significant redevelopment and refurbishment within conservation areas in the City during the last 10 years.
- Major archaeological excavations accompany many City development schemes and transport infrastructure projects such as Crossrail.

Commentary

Local Plan Policy CS12 provides protection for heritage assets whilst development management policies and Conservation Area Character Summary and Management Strategies provide further guidance on the significant features in these areas. The scale and intensity of development in the City requires careful consideration of the impact of development proposals on the City's rich heritage.

Likely evolution without a revised Local Plan

The historic environment in the City would continue to benefit from protection in line with NPPF, London Plan and existing Local Plan requirements.

9. Waste

Context and baseline – waste arisings

9.1. Figure 31 sets out the City of London waste analysed by type of waste by year for the period 2012-18. The high levels of development in the City are reflected in the dominance of construction and demolition waste over other forms of waste.

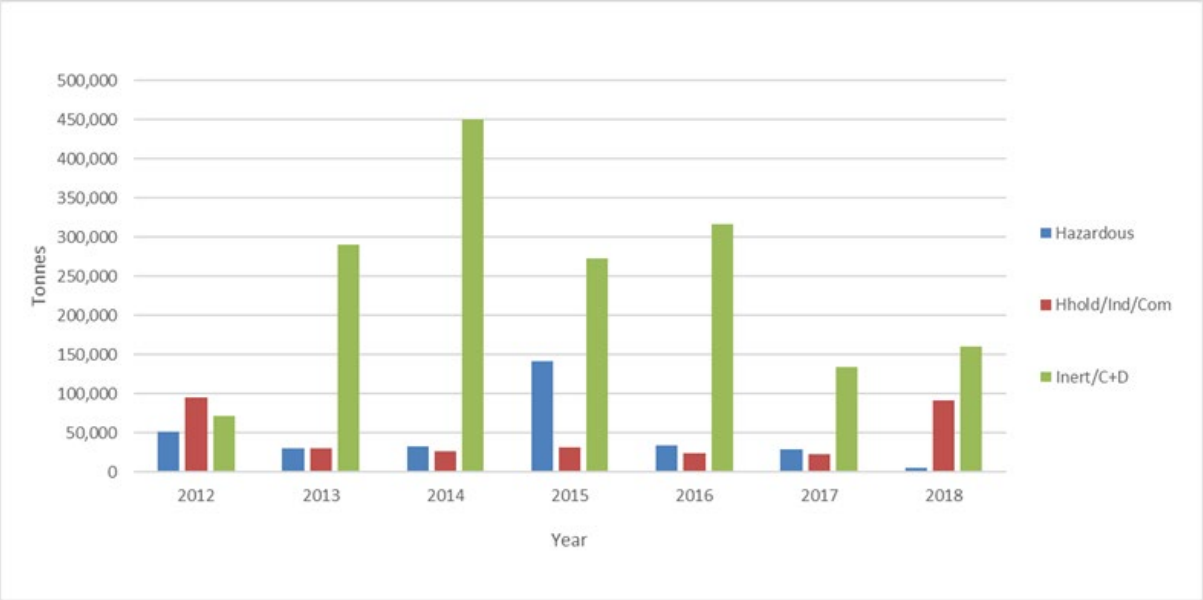


Figure 31: City of London type of waste (tonnes) by year (2012-2018)

9.2. The City exports all of its waste elsewhere for treatment. Around 50,000 tonnes per annum is transported by river from Walbrook Wharf with the remainder going by road to waste management facilities elsewhere in London and south east England. Figure 32 shows the destinations for the City's waste.

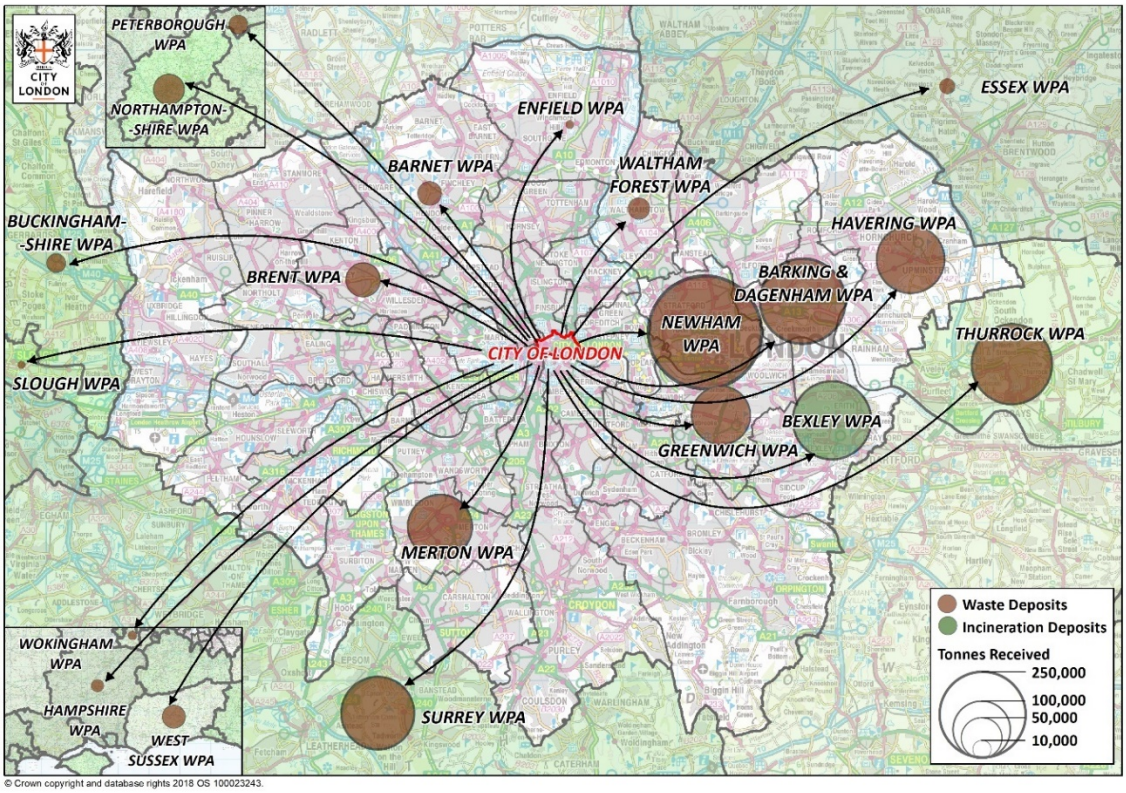


Figure 32: Spatial Distribution of City of London Waste Deposits 2012-2018

Progress against previous SA objective – waste arisings:

Objective: To adopt the waste hierarchy in all activities

- Monitoring of waste arisings in the City is problematic because the majority of the City's waste is commercial rather than household waste and is managed by private contractors.
- Figures for the City's waste fluctuate from year to year. It is not possible to link all waste streams with economic cycles, however the increase in construction waste seen in 2014 corresponded with an upturn in development. Since then, there has been a trend of declining waste arisings, albeit that the figures fluctuate annually.

Commentary

Local Plan policies require the provision of space in buildings for storage and recycling of waste. This assists in managing waste further up the waste hierarchy.

Likely evolution without a revised Local Plan

It is unlikely that any additional waste management sites will be made available in the City. Waste minimisation and circular economy principles may lead to a reduction in waste per person, but this must be offset against an increase in population and employment numbers.