

# SHAPING SUCCESSFUL

# FUTURE CITIES

Why and how we need to start thinking about shaping successful cities for the future, today

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## HOW TO NAVIGATE THIS REPORT

This report includes interactive elements that allow you to go to specific pages and open weblinks.

For details of our sources see **page 41**.





# FOREWORD – FROM MARK ALLAN

Over four billion people across the globe – more than half the global population – live in cities today<sup>1</sup>. This is set to reach five billion before 2030<sup>2</sup>. The success of our future cities is therefore integral to our collective prosperity, health, vitality and success.

It's also key for us as a business – as an organisation that invests in, contributes to, and benefits from the development of our urban spaces. Landsec's success is intrinsically linked to shaping places that bring communities together and thrive into the long-term.

Through the pandemic, we saw the role of the city itself challenged and reshaped, with policy makers still wrestling with how to restore certain cities to health and unlock the potential of others. The success of many of our cities hangs in the balance.

To play our part effectively, we must understand how to respond to shifting needs over the next decade – and how cities should evolve accordingly.

This project combines Landsec's own analysis with The Future Laboratory's unique strategic foresight methodology, to build a picture of what a successful – and unsuccessful – city in 10+ years could look like, as well as the practical and strategic implications. We've explored a range of possible futures so that we can anticipate change and help create a prosperous future. We've mapped the associated opportunities and threats, to allow us to better prepare and to encourage dialogue around the shaping of our future cities.

As you'll see, our whitepaper shows that profound change is needed. If our urban spaces are to remain habitable and thrive long-term, new thinking and approaches are necessary – from the way developments are built, to how we conceive public space, to the types of transport used, and beyond. This paper also underlines the critical

importance of creating people-centric spaces, to allow for thriving communities, with meaningful and sustained investment in the right infrastructure. The greatest challenges facing us all – including climate change – are also the biggest challenges for our cities to conquer.

Design and intention will not be enough. Strong leadership, long-term vision, collaborative engagement with communities, effective policy, as well as good governance, will all be key.

The aim of this paper is to start a conversation and enable present day decisions to create thriving urban spaces. To continue to think, debate and shape the future we would love to hear the views of others, so please do get in touch with your thoughts.



MARK ALLAN,  
CEO LANDSEC



# 5bn

By 2030 five billion people across the globe will live in cities.



# EXECUTIVE SUMMARY

The pace of change – both globally and locally – is accelerating, with rapid technological advancement, political uncertainty and socio-economic upheaval creating unpredictability.

We face a stark reality: if those of us involved in shaping cities – national governments, local government, businesses, civic society and citizens – make the wrong decisions now, we could be faced with cities that, in as little as ten years, are becoming unliveable. It does not, however, need to be this way.

This paper maps out four possible future scenarios for cities, to explore how our urban spaces could potentially change and develop over the next decade, as well as the strategic implications for stakeholders. The four models work from worst through to best case scenario, exploring the key characteristics and defining features of each potential outcome.

Our actions today have a direct impact on which of these futures becomes a reality – which is why the paper also outlines our ‘Six Principles of Urbanisation’. These act as a guide and inspiration for successful urbanisation going forward.

## SECTION ONE SUMMARY: FUTURE CITY SCENARIOS

We outline four possible future cities, envisioned in collaboration with The Future Laboratory, one of the world's most renowned strategic foresight consultancies:

### ADAPTING AND EVOLVING

In this ‘most likely scenario’, cities will evolve by retrofitting existing infrastructure and social resilience will become as important as physical resilience.

Through hybrid and remote working, neighbourhoods will be structured around more local and community-focused businesses, bringing under-utilised spaces back to life.

### GREEN AND FLOURISHING

In the ‘best case scenario’, people flourish alongside the environment. The positive elements of urban life can thrive and the returns from eco-system restoration are clear.

This sustainable city is contingent on understanding the ways in which low-impact materials and building techniques affect the environment. A circular, low-impact approach must be coupled with ways for the city to generate sustainable energy, not just use it.

### EXHAUSTING AND DEPLETING

The ‘worst case scenario’ depicts a future in which urban planning and construction have failed entirely to address environmental concerns and social inequality. The city has been depleted of all its vibrancy and negates the positive aspects of urbanisation.

To avoid this future, in which both people and nature are exhausted, cities need to be designed for the impacts of climate change – including more frequent and severe weather events such as heat waves, flooding and extreme wind – and designed to meet the changing needs of the planet's growing population. This needs to be considered alongside alongside proactively managing the advancement of technology.

### COLLECTIVE AND VITALISING

A ‘possible future scenario’ is a city designed for society holistically, using data and digitisation to enhance quality of life for all residents. The city is focused on equity, health and safety.

For this to become a reality, there are infrastructural and societal changes that must take place. This is beyond the power of a single person or business. It requires genuine collaborative partnerships between developers and local authorities, as well as intelligent use of technology.



## SECTION TWO SUMMARY: THE SIX PRINCIPLES OF URBANISATION



Chris Murray, Director, Core Cities UK

**“If you want to make your own life better, you’ve got to get involved and improve your city. But the city’s got to allow that; it’s got to have mechanisms for doing so, engaging communities in driving resilience”**

To help secure our future today, we have developed Six Principles of Urbanisation. These areas of opportunity – designed to lead us to probable or possible cities of the future – are explained in detail in this section.

To provide a holistic perspective, Landsec undertook a ‘Delphi Method’ to pressure-test these Six Principles – with a diverse range of external experts. By delivering against these Principles, as part of the wider city ecosystem, we’ll be able to start preparing for and meet the challenges and opportunities of tomorrow.

The Six Principles of Urbanisation are in order of urgency as ranked by our panel of experts:

**THE SIX PRINCIPLES** – ranked in order of urgency by our expert panel – are:

<b>1. Climate prepared</b>	<b>2. Resilient</b>	<b>3. Desirable</b>	<b>4. Responsive</b>	<b>5. Equitable</b>	<b>6. Polycentric</b>
Protects citizens against man-made and natural disasters, whilst ensuring the built environment is greener, more efficient, and becomes a net generator of energy and other crucial resources	Copes with fast paced change and external shocks - and still provides economic viability and an attractive, reliable place for citizens to live	Raises the standard for quality of life to attract and retain residents, occupiers and investment	of human skills and emerging technology – to optimise spaces, mobility and wellbeing, whilst prioritising connectivity to improve quality of life	groups of people and businesses who coexist harmoniously, and ensures fair and equal access to amenities, employment, services, business, culture and nature	traditional model – whereby a city develops outwards from a single economic middle – instead promoting a series of smaller centres for accessibility, walkability and convenience
Uses the best	Houses diverse	Disrupts the			

# SECTION 1

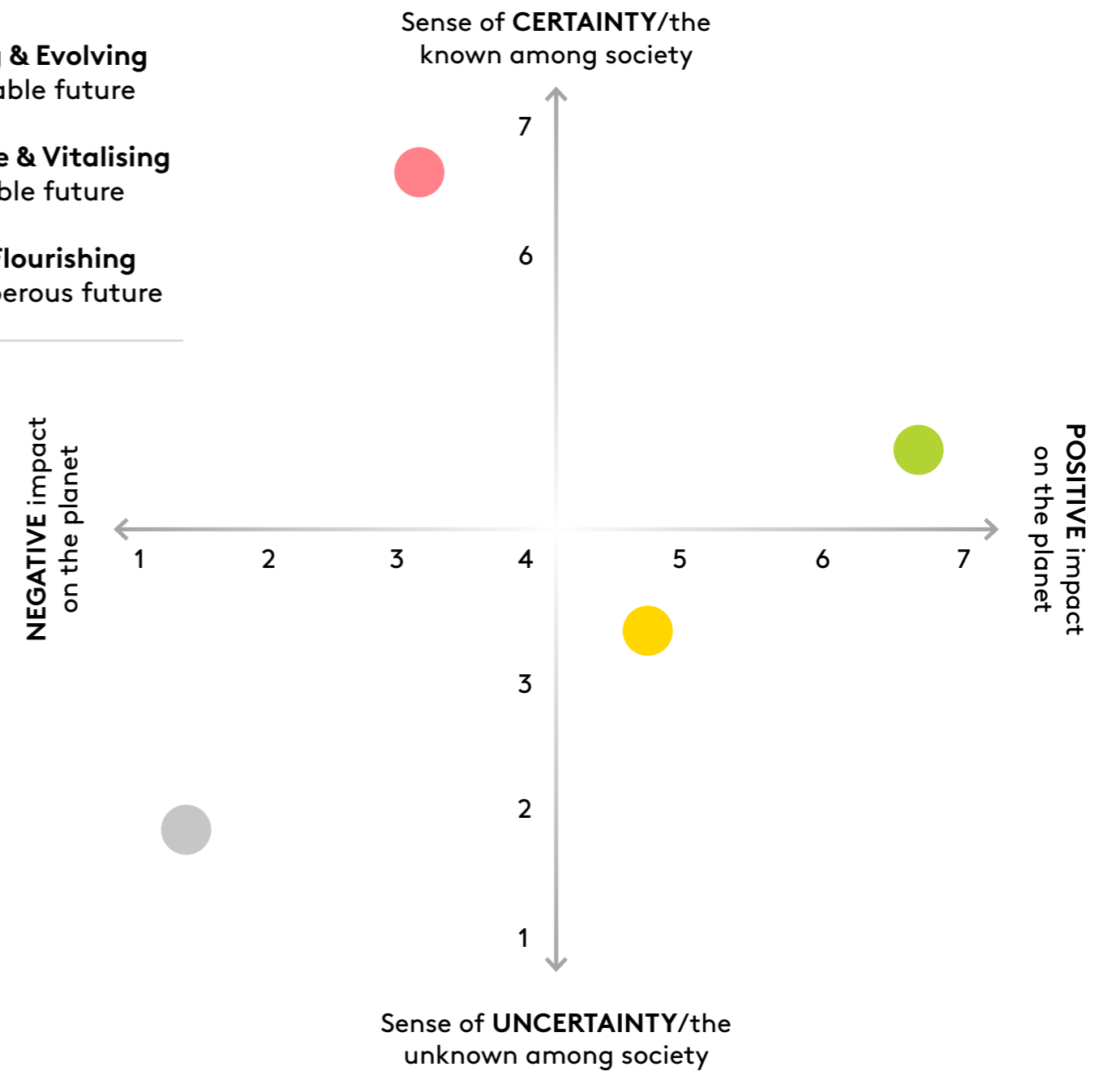


# FINDINGS

## FUTURE SCENARIOS

This report maps four possible future cities:

- **Exhausting & Depleting**  
The problematic future
- **Adapting & Evolving**  
The probable future
- **Collective & Vitalising**  
The possible future
- **Green & Flourishing**  
The prosperous future





FUTURE SCENARIOS

# EXHAUSTING & DEPLETING – THE PROBLEMATIC FUTURE

This scenario explores the ‘worst case scenario’. The problematic future is one where urban planning and construction take no heed of their environmental impact or climate change and a lack of action on social cohesion results in deepening divisions. We see a city landscape where both people and nature have been depleted.

KEY ATTRIBUTES:

▶ ANTI-NATURE

In this future, buildings are erected without consideration for their impact on the environment. Much of the city works against nature. Green spaces have been covered, creating higher temperatures. Poorly positioned tall buildings – concentrated too densely, without careful planning – exacerbate wind tunnels and deplete air flows while the lack of drainage results in regular flooding.

▶ EMBODIED CARBON

Carbon-intensive materials, alongside materials with short linear lifecycles, continue to be used. As buildings fail to be resilient to an escalating climate emergency and are demolished, the result is a damaging cycle of continuous knocking down and rebuilding – rather than refurbishing existing buildings, to the detriment of the climate – a demonstration of short-term thinking around urban planning.

▶ REFUGEE & MIGRANT CRISIS

An increase in global tensions has resulted in a rise not only of climate migrants, but also of refugees from war-torn nations. Without additional investment in services, this puts pressure on the cities' ability to cope with an influx of residents, and increased tension between long-standing inhabitants and newcomers.

▶ TECHNO-DIVIDE

We see a privatised system, run by a precarious arrangement between the dominant big tech companies. Citizens are expected to give up their data in exchange for living in the city. Those who cannot afford devices have been left behind and are not able to access many services, including healthcare, later life care and childcare.

▶ URBAN FLIGHT

In this version of the future, declining urban quality of life drives heavy urban to rural migration, which has negatively impacted all the amenities that once made the city shine. Restaurants are shut, stores once closed remain boarded up and the city itself has had to file for bankruptcy due to a steep decline in property tax income. The result is large pockets of urban decay, empty buildings, and little social support or sense of community.

▶ ISOLATED LIVING

Those who could not afford to leave the city are forced to stay. Many have lost their jobs due to automation and remote lifestyles leave many spending days indoors. The densification of the city has resulted in increasing loneliness. There is very little nature or shared spaces, resulting in an absence of meaningful social contact and a growth in anxiety and depression.



## WHAT EXHAUSTING & DEPLETING MEANS FOR CITIES

- > The problematic future is directly a result of short-term thinking. To avoid it requires taking a more holistic approach to building – from design to construction, to use and end-of-life
- > The built environment has been shown to have a direct correlation with urban environmental phenomena such as heat islands – buildings and roads that typically absorb and re-emit the sun's heat more than natural landscapes. Any future buildings need to mitigate or alleviate these effects to avoid worsening the situation. How we design our new buildings is of paramount importance in reducing heating capacity and improving summer cooling capacity to cope with intense heatwaves
- > Technology can be both a boon and a burden to making a city run better. It is vital to consider who has access to technology and whether it is adding true value or creating new barriers
- > Urban densification does not automatically result in community. Green and shared spaces in dense urban environments are crucial to a sense of social cohesion. Careful development, done 'with' and not 'to' cities will create that sense of place that has local identity and individuality at its heart<sup>3</sup>

**" With climate change, social dynamics come into play. The wealthy can leave, but the poor can't. If you look at the predicted 50-year sea level rise in London, the poor in places like Newham are a lot more affected than the wealthy in Westminster'."**

Usman Haque, Founder, Umbrellium



EVIDENCE

In 2020, **30m** people were displaced due to the climate crisis. **70%** of people internally displaced – those who are forced to leave their home but remain within their country's borders - moved to urban areas.<sup>4</sup>

Cities consume **75%** of the world's energy and produce up to **60%** of greenhouse gas emissions.<sup>5</sup>

In the absence of any approaches to address urban heat risk, heat-related deaths in London could more than **double** by the 2050s<sup>6</sup>



FUTURE SCENARIOS

# ADAPTING & EVOLVING – THE PROBABLE FUTURE

At the heart of the probable future are notions of adaptation and prevention. In this future, cities will evolve by retrofitting their existing infrastructure and responding to new technology, and social resilience will be as important as physical resilience.

KEY ATTRIBUTES:

▷ RESILIENT PARTNERS

Government bodies look to private businesses to contribute to building more resilient infrastructure. Landlords, developers, and retailers have expanded beyond their original purpose, creating property strategies that include leasing under-utilised spaces for meanwhile use, social enterprises and charities. Social infrastructure has become crucial, with developers and landowners dedicating space to community uses, libraries and public parks. By building a sense of community, the city can develop resilience to future shocks.

▷ MODULAR DESIGN

New buildings are modular, deftly using design and materials to allow for easy changes. The relaxation of planning class systems has changed the meaning of mixed use, making it easier to adapt between uses to reflect changing demand – as buildings can be easily disassembled and reconfigured.

▷ OPEN-SOURCE CITIES

Sensors gather data across the city and feed back information to its digital twins. This abundance of information – and ability to see what is happening in real time – means open access to data, encouraging a participatory culture, with a city more open to innovation. Citizen participation and awareness around privacy, anonymity and accountability are key.

▷ PEOPLE PARTICIPATION

People are the key stakeholders. A large proportion of the city's budget is now given over to citizen-led projects. Technology as well as community engagement programmes are designed to ensure more people have a say in their built environment.

▷ INSTANT ACCESS

Cities have undoubtedly been impacted by the pandemic, with attitudes towards home working changing. This future is not about the instantaneous city, where most amenities are immediately accessible. With convenience/functional based shopping moving online, large-format stores and destination-led retail are complemented by smaller, more intimate experience spaces, as well as community sites.

▷ SELF-SUFFICIENT HUBS

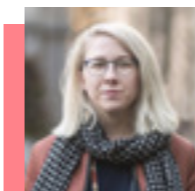
Governance of cities has transformed over the past decade, enabling more decentralised decision making, driving a desire for self-sufficiency, and maintaining value within the community. Community initiatives mean local areas become more self-reliant, by generating their own energy through renewable production, by producing and sharing goods and services and with urban farms enabling society to reduce their food miles.



## WHAT ADAPTIVE & EVOLVING MEANS FOR CITIES

- > With planning, class systems can become more flexible, presenting an opportunity to create more responsive buildings – ones that change as the needs of residents change
- > Social infrastructure is critical to building more resilient cities. Public-private partnerships could ensure that more spaces dedicated to community are established across the city
- > There is a risk that residents of modern cities can be transient. But if the city involves them in planning, participation breeds deeper engagement and a desire to stay
- > The shape of neighbourhoods could be permanently changed by the shift to working from home – at least part of the time. Retail storefronts will now be made up of a mixture of traditional names, smaller independents, and local, community-focused businesses
- > The potential for urban environments to reimagine and repurpose existing space is enormous, and local planning authorities have a huge opportunity – particularly if they partner with industry – to bring obsolete places back to life

**"The city has to be 100% greener and then absolutely has to be more people-centric. We need to rethink our streets because changing buildings is hard. We're going to have to adapt to the buildings and structures that we're given... The real innovation is in adaptive re-use [to extend the lifecycle of buildings]"**



Katrina Johnston Zimmerman, Founder, THINK.urban

EVIDENCE

A 1/4 of Paris's outlay from 2021 to 2026 could be decided with the input of Parisians<sup>7</sup>.

**£5.2bn** invested in flood and coastal defences in England from 2021 to 2027, to better protect **336,000** properties with 2,000 new defence schemes.<sup>8</sup>

**80%** of the 2050 housing stock is already built, and the UK has at least **19 million** existing homes in need of low carbon retrofit.<sup>9</sup>





FUTURE SCENARIOS

# COLLECTIVE & VITALISING – THE POSSIBLE FUTURE

This possible future is one where the city is focused on safety, equitability and health. It is a city that is emotionally intelligent and empathetic to the needs of all urban dwellers, not just the most productive – making it desirable for all. This is a positive outcome – and one that is firmly in our reach, if we take the right steps now.

KEY ATTRIBUTES:

▶ POSITIVE AGEING

The city has become friendlier to ageing. Urban neighbourhoods have become a popular alternative to retirement villages. Digital infrastructure is embedding the elderly in the wider community, while neighbourhood volunteers offer connectivity training and social support. Digital layers of information designed for senior citizens allow them to discover public restrooms, shaded rest stops and safe walking paths.

▶ INCLUSIVE DEVELOPMENTS

Integration, inclusivity and intersectionality are central to the built environment. Consideration for female safety has been highlighted through the design of well-lit and accessible walkways. There are more public shared spaces, and care has become collectivised to provide support for working families. Neighbourhood investment schemes prevent displacement of lower-income residents, enabling a diverse spectrum of people to live in the community.

▶ EMOTIONAL IQ

Citizens appreciate technology's role in catering for their wellbeing. With mental health a top priority, the technological fabric of this city is used not only to boost productivity, optimise distribution, or improve movement, but in the future it can enhance citizens' emotional wellbeing through understanding needs and moods and augmenting spaces in response.

▶ PLAYABLE CITIES

Children are considered key constituents, with their developmental needs embedded in the environment around them and pedestrianised play streets and play built into structures, such as bus stops. Co-design is critical, with older children and teenagers also contributing to the design of hangout spaces and centres.

▶ TRANSPORT FOR ALL

Healthy movement is a predominant mode of travel. The city has been designed so that most people do not have to travel far and can get to where they need to go by walking, running, or cycling. For journeys further afield, affordable shared mobility services dominate and private car ownership in the city is practically obsolete.

▶ HIGHLY REACTIVE BUILDINGS

Designed to ensure optimal efficiency of the building systems. Operations teams can shut down floors when they're not used, using sensors to direct people to specific locations to direct ventilation there rather than serving the whole building, and use air quality sensors to determine whether windows can be opened for fresh air.



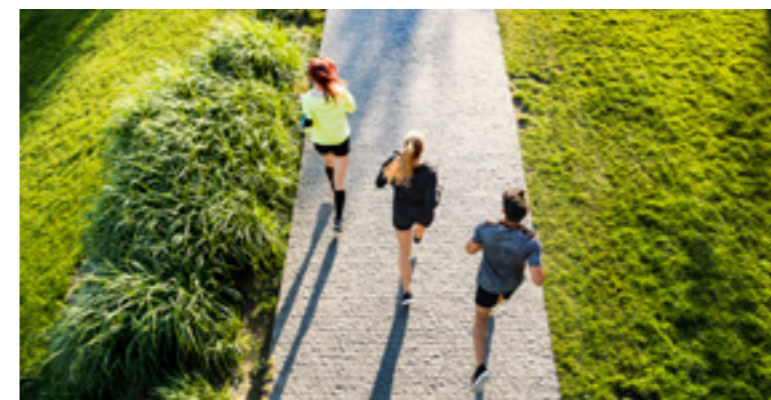
"We need to complement artificial intelligence with emotional intelligence with apps that understand how you feel as you move through different parts of the city emotionally. What are our needs? They might be much more deep-seated. They may not be met by [current iterations of the smart city]"



Chris Murray, Director, Core Cities UK

## WHAT COLLECTIVE & VITALISING MEANS FOR CITIES

- > Cities are already heterogeneous places to live – filled with diversity and variety. But to be 'Collective and Vitalising' means ensuring that the differences between people are supported and celebrated, rather than exacerbated
- > Designing for the fringes of society – or edge consumers – is a way to ensure that projects are inclusive from the start. There may be unseen benefits that are more widely felt in the community, such as cleaner air from pedestrianisation
- > Here, it has been considered how digital technologies can be used as a way to enhance and support people's mental wellbeing as they make their way through the city
- > The issue of care is an invisible issue in cities today. Creating spaces that support caregiving services has economic opportunities, such as presenting parents with the opportunity to return to the workforce by providing support for their children



## EVIDENCE

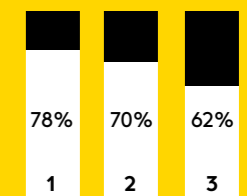
In a survey of older people in the UK,

**52%** said they do not go outside as often as they want because of a lack of public toilets<sup>10</sup>.

Economic growth is not the only measure of success or desirability.

Over three quarters of UK businesses that have implemented a four-day working week say staff are:

1. Happier
2. Less stressed
3. took fewer days off ill<sup>11</sup>



**£36m** **90%**

was cut from annual youth service budgets across London between 2011/2012 and 2021/2022<sup>12</sup>.

Adding first- and last-mile transport services increased job accessibility to underserved communities in Chicago by up 90%<sup>13</sup>.





FUTURE SCENARIOS

# GREEN & FLOURISHING – THE PROSPEROUS FUTURE

We have also mapped the ‘best case scenario’. The prosperous future provides a stark contrast to the first scenario explored. It is a city which acknowledges that in order for people to flourish, the environment around them must be protected to flourish as well. In this city, the positive elements of urban life – from cultural innovation to easy access to amenities that are desirable – can thrive.

KEY ATTRIBUTES:

▶ **CITIZEN NATURE** 

Pollinators, wildlife and trees are now key stakeholders for any urban planning decisions and buildings are habitats for both humans and wildlife. Like the economic services of a city, nature’s ecological services are now quantified and measured in a similar way. Bio-corridors have been created where nature has been allowed to heal and rewild, increasing cities’ biodiversity and resilience.

▶ **REGENERATIVE CYCLES** 

This prosperous city is not simply resource-efficient, but also contributes more back to nature than it extracts. Regeneration takes many forms, from the materials selected for use to how energy is generated. Timber and biologically grown materials take preference. More buildings are becoming carbon-negative, energy is shared among neighbours and waste is changed to materials in a circular way.

▶ **FREE-FROM STREETS** 

The streets of this city are mostly free from cars, and therefore from emissions and noise pollution. Mobility in the city has been reconfigured to focus on walkability and cyclability, while disabled accessibility and movement is also front of mind. Where there are vehicles, they are zero-emission, and the energy needed to charge them is generated from the roads themselves. Free-from streets are celebratory and convivial, with squares dedicated to silence to enhance feelings of calm and relaxation.

▶ **POSITIVE GROWTH MINDSET** 

Growth for growth’s sake is no longer considered a desirable goal. Rather, every transaction in the city, whether economic or social, is based on notions of support and exchange, and how much it contributes to the net-positive wellbeing of the entire system rather than a single individual. A cooperative and collaborative mentality takes precedence, enabling the city to take on climate change.

▶ **PRESERVATION SOCIETY** 

People are engaged and empowered to ensure that they are part of preserving the environment that surrounds them. Each household has a free-to-use monitor that enables them to understand their carbon footprint and offers suggestions on how to lessen it throughout their day. Local recreational activities that encourage connection with nature, such as maintaining the bio-corridors, are popular pastimes.

▶ **HYBRID NEIGHBOURHOODS** 

Residents are enmeshed in both the natural world and the cultural vibrancy that cities have to offer. Storefronts are more diverse than in the past. They include independent and locally-focused retail sitting alongside favoured brands, as well as recreational amenities such as cultural venues, parks, and libraries, which enhances the low-carbon impact of the neighbourhood – and lack of cars – and the strength of social cohesion.



## WHAT GREEN & FLOURISHING MEANS FOR CITIES

- > Having a green, sustainable city offers a way for every inhabitant to thrive. Clean air and green cities will make for healthier citizens, who feel more engaged and energised by their living environment
- > Circularity is an acknowledgement that we live on a planet with finite resources. Creating a circular city will enable people to still enjoy the vibrancy of urban living with less of an impact
- > Creating an environment that is ‘Green and Flourishing’ goes beyond tree-planting and beehives. Low-impact materials and considering how a building will generate and share energy will become more important. Cities need to become net contributors to food and energy resources
- > It is vital for the city to have an identity separate from the countryside. Creating walkable, one-minute cities will deliver the vibrancy that people desire from city living

EVIDENCE

Adding just 10 trees to a city block has been found to affect people’s perceptions of their health and wellbeing, equivalent to the effect of earning **£10,000** more in income<sup>14</sup>.

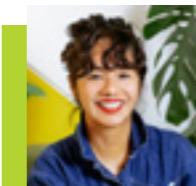
Between **230,000** and **280,000**

charging devices for electric vehicles will be needed in Britain by 2035 to meet the demand for EVs<sup>15</sup>.

On average, every £0.75 spent on eco-system restoration – such as projects to increase protected areas, restore or improve forests, croplands, or grasslands – gives a return of about £7.50. Returns include improved agricultural yield and greater resilience to natural disasters<sup>16</sup>.



**"We have to start thinking in an eco-systemic manner. Are we in mutual symbiosis with nature? Or are we going to constantly contradict the laws of nature? We can't change it so how do we rehabilitate and work with nature?"**



Araceli Camargo, Director, Centric Lab

# SECTION 2



# THE SIX PRINCIPLES OF URBANISATION IN PRACTICE

So, we have mapped possible outcomes. How do we ensure we reach a positive one in 10+ years?

This is where the Six Principles of Urbanisation come in. These principles, guided by the above scenarios and pressure-tested with a panel of leading industry experts utilising the Delphi Method, are designed to help us navigate urban change over decades to come. By taking these on board, we have the best possible chance of creating cities that are flourishing and prosperous well into the future.

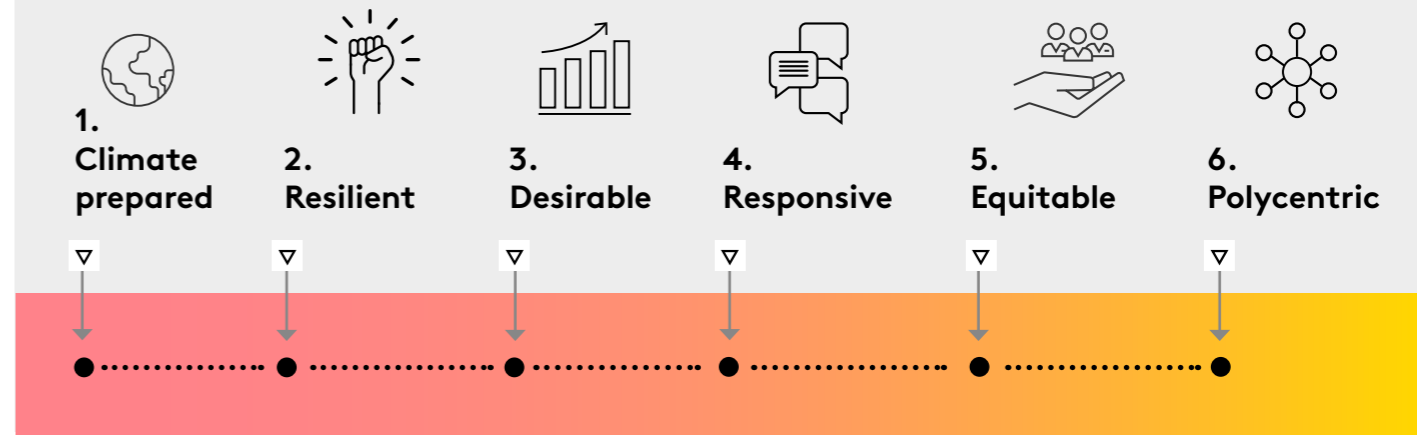
In short – these are the over-arching principles we need to follow, if we are to avoid a dystopian future.

In this section, we will define and explain each principle in depth, to illustrate how they should be considered in urban planning.

The aim is to provide a basis for best practice, as the cities of the future are developed. This is not just about us here at Landsec – it is about all those in the city ecosystem – including developers, advisory partners, local authorities, city mayors, national governments and the broader community.



THE SIX PRINCIPLES – ranked in order of urgency by our expert panel – are:



PRINCIPLE ONE:



# CLIMATE -PREPARED



With the effects of climate change already being felt globally – and far greater and unpredictable ones to come – cities must continue to mitigate the impacts of through net-zero carbon infrastructure and be climate-prepared through resilient buildings.

There is a clear urgency and need to act now. Cities that do not adapt will no longer exist. It is as simple as that. The greatest challenge facing mankind is also the biggest challenge for cities.

**“Climate change is the biggest challenge facing mankind. Cities that are not climate prepared – or even those that are but are in the wrong place – literally won’t be there in the future.”**

Anonymous Active Travel Expert and Advisor

## A CLIMATE-PREPARED CITY



Provides protection for citizens against man-made hazards, natural disasters, and future pandemics



Adapts and retrofits the existing built environment to be greener, more efficient, and more resilient



Utilises new technology to help urban centres become net generators of energy, food and other crucial resources

## WHAT DOES THIS INVOLVE?

### 1 MANDATE CHANGE – TO CREATE THE RIGHT DEVELOPMENT ENVIRONMENT

Many cities are already adopting the UN's sustainable development goals or their own net zero commitments but given the urgency of the challenge, we need to be mandating these.

We need to see solutions now – from climate resilient housing, factoring embodied carbon reduction into new buildings and developing techniques, to rewilding and greening spaces and regeneration of brownfield sites. We need to see new infrastructure investment – which both protects citizens from new risks and provides clean air, renewable energy and fit for purpose utilities that lead to a low carbon lifestyle.

### 2 PLACE ‘THE UNKNOWN’ AT THE HEART OF PLANNING – WHICH POSITIVELY CONTRIBUTES RATHER THAN MITIGATES THE INEVITABLE

Many risks in this space are unknown – and this needs to be factored into approach and planning across the globe. This is a complex challenge which crosses national boundaries.

Cities need to invest in modelling possible outcomes and prepare different routes of action accordingly, to strive for the best possible outcome. Predicting, understanding, and managing human impact is a huge challenge, but much can be done today, especially if we work together across industry and government.

### 3 ADAPT AND REUSE

Fundamentally, cities must adapt and reuse in a whole range of ways - from creating urban density and proximity, to providing fit for the future infrastructure that protects and reverses environmental risks, to developing new means of local production. Renewable energy will also, of course, be one of the most important factors here – carbon must be decoupled from this cycle.

The need to adapt will present many economic opportunities.



**“Whilst there tends to be a focus on top-down governance and infrastructure change, the key to enabling a city of the future is to create mass behaviour change and citizen focussed climate preparation and responsiveness.”**



Stephanie Edwards, Director and Co-Founder, Urban Symbiotics

▶ CASE STUDY NEXT PAGE...



### CASE STUDY

Landsec creates places that make a lasting positive contribution to its communities and the planet. This means anticipating and responding to evolving needs, keeping environmental and social issues at the core and building for the future.

In creating the UK's first commercial building designed in line with the UK Green Building Council's (UKGBC) net zero carbon framework in both construction and operation, it has done just that. The Forge is built using the highly efficient and sustainable platform approach to design for manufacture and assembly, and has contributed to a c.35% reduction to date in embodied carbon from the initial design phase. It offers 139,000 sq ft of Grade A office space in the cultural hub of Bankside.

In addition, Westgate Oxford, which Landsec opened in 2017, is one of the lowest carbon retail destinations ever built, offsetting landlord energy use of 30 years through embodied carbon savings at construction.

Westgate Oxford



The Forge



### PRINCIPLE TWO:



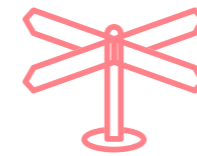
# RESILIENT

**"I think that community resilience and social resilience is vitally important in terms of a resilient city because a resilient city is not just the physical buildings and roads and what have you, it is manifestly the people."**

*Anonymous Active Travel Expert and Advisor*

Resilience is the ability for cities to cope with fast paced change and external shocks - and still provide economic viability and an attractive, reliable place for citizens to live.

### A RESILIENT CITY



Is flexible, adaptable and always evolving as needs change



Is resourceful and self-reliant



Focuses on both new development and urban renewal of resources in equal measure



Is supported by robust, future-proofed infrastructure



Prepares for potential civil, political, economic and environmental disruption





WHAT DOES THIS INVOLVE?

**1 FOCUS ON 'HOLISTIC INFRASTRUCTURE'**

City infrastructure represents an obsolescent timebomb. We need to better plan for long-term reuse. The focus now needs to be on ensuring that physical infrastructure can be adapted as lifestyle and technological change accelerates.

We need to create this physical resilience through 'a whole city' approach – to create holistic and sustainable urban environments that will stand the test of time.

**2 PLACE EMPHASIS ON SOCIAL CAPACITY**

Social infrastructure is increasingly important – often more so than physical now. The ability of citizens to come together and collectively survive shocks – be that economic, climatic or health related – is vital, and needs to be a focus for cities looking forward.

Increasingly, people are placing emphasis on community and a feeling of belonging when choosing where to live. Cities must address urban loneliness especially, which increased over COVID-19, and is a growing problem in areas with high density but low community participation.

**3 CREATE NETWORKED CITIES**

The UK, like many other nations, is hugely reliant on international supply chains, which are becoming more vulnerable to disruption – felt especially acutely in urban areas.

Robust networks within cities, which provide the infrastructure for daily life, are becoming more important. These must be prioritised – for food provision, healthcare, childcare, delivery of goods and materials.

**4 BUILD DIVERSIFIED CITIES**

Diversification is increasingly key, in terms of types of cities we build and maintain (be that capital, industrial, historical, new etc). A mix of city types will allow us to address future disruption.

For example, economic and demographic diversification is key in attracting many industries, stimulating growth and overall prosperity.

**5 FOCUS ON RESPONSIBLE GOVERNANCE**

Governance is key to establishing resilience and for allowing all of the above to play out.

Addressing structural issues that have resulted in a lack of resilience, diversity and social mobility across UK cities is a main focus of the UK Government, and responsible governance is central to achieving greater productivity and economic regeneration. Creating a stable environment is also necessary to attract inward investment.

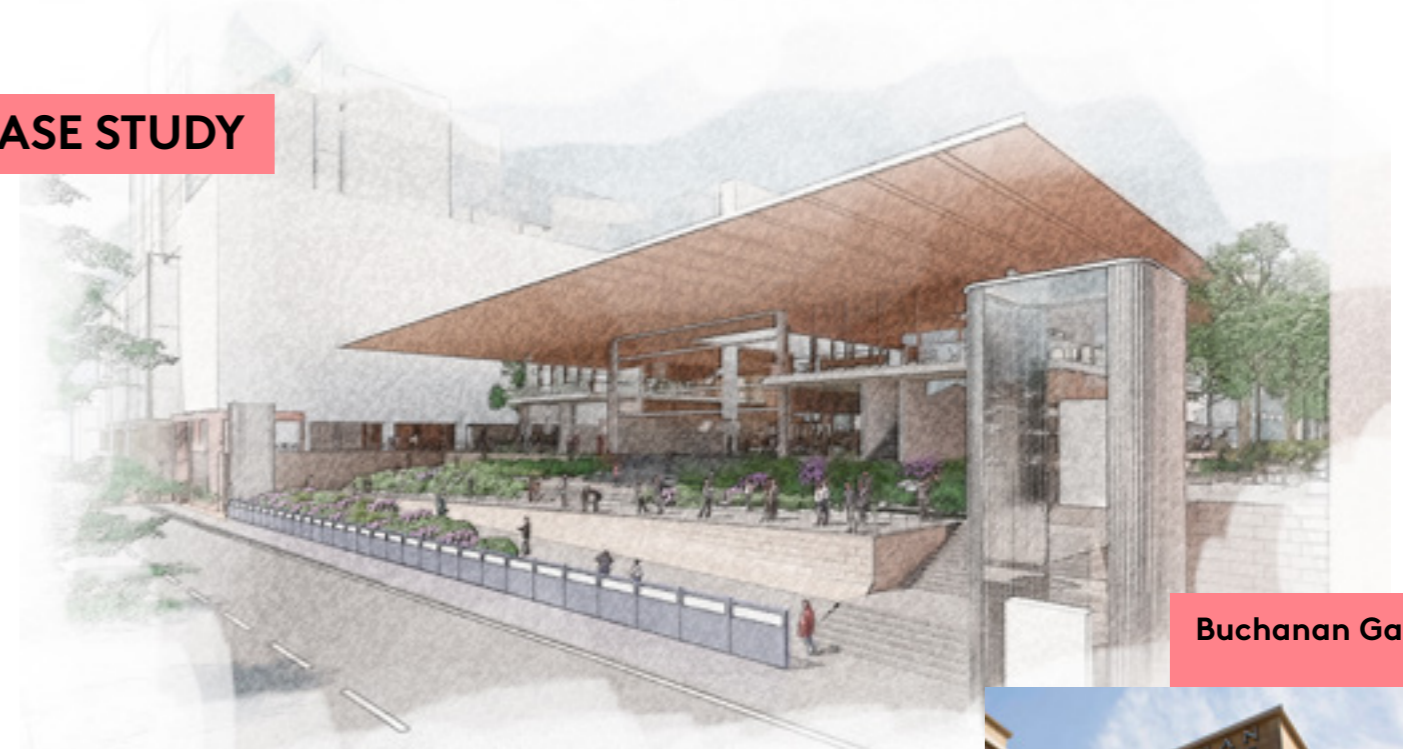
**“The recent pandemic has had and continues to have a significant impact on our cities. Their ability to adapt and remain economically viable and attractive places to live is dependent on their resilience.”**



Prof Sadie Morgan OBE, Founding Director, dRMM



CASE STUDY



Buchanan Galleries

**BUILDING A RESILIENT URBAN SPACE IN GLASGOW: BUCHANAN GALLERIES**

Landsec has created a new mixed-use vision for Buchanan Galleries – which it has owned and operated since 2004 – designed to deliver a vibrant, sustainable new city district for Glasgow, with resilience at its core. Consultation and planning is currently underway, with delivery scheduled for over the next ten years.

The new plan places net zero ambitions, connectivity, adaptability, regeneration and also public enjoyment and wellbeing at its heart. This combination ensures the space has the ability to withstand future shocks and to respond to evolving needs over years to come.

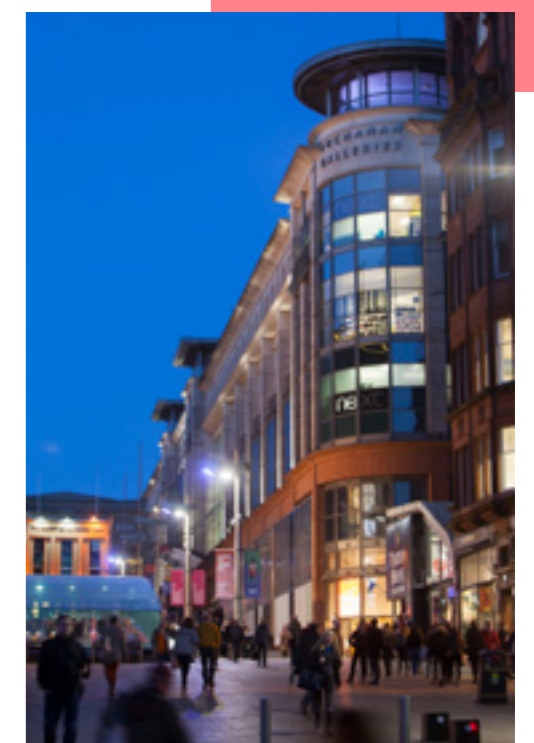
The new development will see a blend of world-class shopping with places to work, live and play. The current site will be opened up into a number of flexible buildings and streets, with public transport connections enhanced to support 'active travel' – allowing people to move across the city more easily. Cyclists and pedestrians will be prioritised, with safe and intuitive pathways linking public areas.

Flexible, quality workplaces – designed for a diverse mix of tenants – will draw workers into the city, ensuring life and spend. The

focus will be on a 'hospitality' experience here, with access to great amenities.

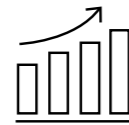
Sustainability will be considered holistically, with regenerative design at the core. There will be a focus on creating opportunity and minimising future constraints, with a low carbon approach to materials, manufacture and construction and a focus on energy efficiency across all buildings.

The masterplan will also consider a series of significant, new 'public realm' spaces as part of Landsec's vision to create a cleaner and greener city centre environment and a safe space to walk, wheel and dwell. A larger, open and fully accessible public space is being considered, to support people in coming together for a range of activities.





PRINCIPLE THREE:



# DESIRABLE<sup>17</sup>



As people the world over reconsider the areas they inhabit, future urban centres must offer a more holistic set of desirable features to grow. Future cities must raise the standard for quality of life to attract and retain residents, occupiers and investment.

**“People are happy to pay a premium to live close to vibrant urban areas, but not when accommodation becomes highly unaffordable relative to the space it offers.”**



Prof Phil Hubbard,  
Professor of Urban  
Studies, Kings  
College London

## A DESIRABLE CITY



Prioritises a high quality of urban life for all residents



Offers a vibrant public life, healthy environments and reliable services



Is a social, cultural and innovation hub



Acts as a magnet for top talent and investment



Is walkable and accessible



Is bolstered by green spaces



## WHAT DOES THIS INVOLVE?

### 1 FOCUS ON HUMAN NEED FOR VIBRANCY

Ties to cities risk becoming weakened over time – with the adoption of hybrid working patterns, online shopping and other developments. To remain desirable, cities must establish a competitive advantage. Rather than trying to replicate 'the countryside', they should focus on the unique factors that make urban hubs desirable and speak directly to human need.

Cities offer the unexpected, vibrancy and multicultural experiences. The ability to socialise, stimulation and diversity are all key. These are the elements that should be promoted and enhanced.

### 2 CELEBRATE IMPERFECTIONS

To create the conditions for vibrancy, the imperfections of city life should be celebrated rather than addressed or ignored. Sterile and defensive city centre spaces are not viable long-term. They are inauthentic.

Human emotion should be at the centre of design decisions. 'Grubbiness' – with local contributions to the creation of the city – can result in the perfect conditions for vibrancy. Again, it is about balance here.

### 3 PRIORITISE EQUALITY

Economic opportunity pulls people into cities – but it acts in opposition to push factors, such as higher cost of living and reduced space. Equality is central to this principle and needs to be placed at the forefront of urban development looking forward.

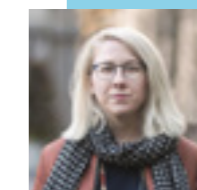
Cities with lower costs of living, while offering similar economic 'pull' factors such as employment, are poised to thrive.

### 4 FOCUS ON LIFESTYLE AND MAGNETISM

Ultimately, overall quality of life will be the true measurement for successful cities. The magnetism of cities – from cultural, social and experiential benefits – needs to be offered in parallel with good healthcare and other services, as well as protection from economic and climate shocks.



**“Self-limitation and simplification are very desirable right now. People want consistency, and if cities can engender the familiarity of a smaller town in an urban setting, it could be really valuable – particularly after all the tumult we’ve been through recently.”**



Katrina Johnston  
Zimmerman, Founder,  
THINK.urban



CASE STUDY



Mayfield in Manchester

Landsec is the funding partner and developer through its regeneration business for Mayfield, a transformational mixed-use city centre regeneration project

It will provide over 2.3m sq ft GIA office space – facilitating 16,000 new jobs, 1,500 homes, 56,000 sq ft of retail and leisure, a new 300-bed hotel and 13-acres of public realm, including Mayfield Park – the city’s first new park in over 100 years. Development partners include The Mayfield Partnership, Manchester City Council, Transport for Greater Manchester, LCR and U+I.

56,000 sq ft of retail and leisure space



PRINCIPLE FOUR:



# RESPONSIVE

Future cities will need to become more responsive if they are to be viable. As the world becomes more urbanised, sensitive, and reactive, technological systems that have citizens' consent will be needed to improve public services, productivity and address environmental threats.

“I think true responsiveness lies in an ability to challenge existing urban structures, assumptions and systems collectively, and to re-envision the city together. Digital tools can certainly support this.”



Dr Ellie Cosgrave, Director, Publica and Associate Professor in Urban Innovation and Policy at UCL

## A RESPONSIVE CITY



Uses best of human skills and emerging technology – to optimise spaces, mobility and wellbeing



Utilises technology to measure, optimise and automate to improve quality of life



Prioritises connectivity for all



Remains inter-connected with key global economies around the world





WHAT DOES THIS INVOLVE?

**1** PRIORITY QUALITY OF LIFE

Across multiple dimensions, technology should be used to improve quality of life for citizens, enabling better distribution, planning and integration of urban area uses and activities.

Technological solutions can boost citizens' day-to-day life. For example – improving public safety through efficiently deployed resources, reducing congestion and commute times through smart mobility applications, boosting health outcomes to prevent and treat conditions, and creating a more sustainable environment through linking usage and monitoring through sensors.

Putting quality of life at the centre of innovation will be key.

**2** FOCUS ON DATA DRIVEN SOLUTIONS

As urban densities increase and populations rise, alongside the adoption of convenience lifestyles, infrastructure networks are increasingly strained. Supply chains are growing more complex and congestion, pollution and embodied carbon are becoming heightened problems for cities around the world.

The monitoring and management of cities are currently treated as related but distinct activities.

There is therefore, much progress to be made in delivering data-driven solutions, to benefit urban systems and citizens, and this must be front of mind.

**3** BUILD PUBLIC TRUST AND ROBUST GOVERNANCE

Concern around the potentially negative impacts of data collection, surveillance and technology are well-known. These are legitimate. Technological solutions must, therefore, be implemented in a way that allows for dialogue with the public.

There is an urgency to act but citizens must be aligned with any technology deployments. Fundamentally, the end result should be formed using a data standard and system which allows for public participation – and sets clear requirements and expectations for all involved.

**4** ADOPT A COLLECTIVE MENTALITY

Utilising data should be seen as a chance to re-envision cities together – with populations and governments disrupting existing structures, institutions and systems collectively.

The challenge here is in establishing and sustaining a social contract. The real risk is that technology is used for the benefit of consumerism and marketing, rather than helping to deliver anticipatory services that benefit all.

**5** MAINTAIN SPONTANEITY & CREATIVITY

The challenge comes in creating cities shaped more purposefully by data and digital technology, that still allow for flexibility, spontaneity, creativity and organic growth of culture and identity. All of these elements are key for public happiness and wellbeing. Ensuring technology does not stifle them is essential – it is about balance.

**“Responsiveness is tricky – tech companies tend to find the broadest common problem and generalise at scale. Instead, cities should consider those at the ‘edge’ – people on the periphery who aren’t being considered – and build outwards from their needs instead.”**



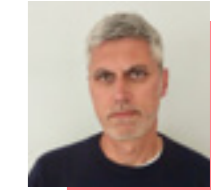
Usman Haque, Founder, Umbrellium



PRINCIPLE FIVE:



**EQUITABLE**



Prof Phil Hubbard, Professor of Urban Studies, Kings College London

With societies across the globe increasingly divided, cities can play a crucial role in addressing economic and social inequalities. Placemakers, and other businesses who create and participate in cities, will be measured by how equitable their places are, to ensure that residents, businesses and nature thrive in equal measure.

**“The key challenge for many cities is how to close up the gap between rich and poor, creating mixed communities where standards of living, quality of life and wellbeing is more equally distributed. This is difficult as so often mixed community policies encouraged gentrification.”**

AN EQUITABLE CITY



Positively contributes to the potential for city regions and the whole UK



Is home to diverse groups of people and businesses, coexisting harmoniously



Ensures fair and equal access to amenities, employment, services, business, culture and nature







WHAT DOES THIS INVOLVE?

1 PRIORITISE SOCIO-ECONOMIC EQUALITY

Socio-economic measures for equality – in the form of income, social mobility, housing provision, crime rates and health indicators, amongst others – show huge disparities within and between cities in the UK and globally. With a cost-of-living crisis playing out here, this is further exacerbated.

A focus on socio-economic equality must be key – and will drive long term desirability for people and business – creating thriving urban places.

2 CREATE INCLUSIVE SPACES

Addressing socio-spatial discrimination and providing mobility for all must also be a key priority. This will mean cities are inclusive – accessible for the whole of society – and hold, as a result, wider appeal and desirability long-term.

3 CREATE INTERCONNECTED AND INTEGRATED COMMUNITIES

Diversity is key to achieving vibrancy and appeal. Multi-generational, multi-gender spaces are the ones that breed more than comfort. Simple design measures can dramatically increase agency and wellbeing for disadvantaged groups and minorities.

While not all of societies divides can be addressed by cities alone, designing and creating integrated places – where 'other' people and cultures can live cohesively – can help drive positive societal shifts here.

4 MAKE GOVERNMENT ACTION MORE INTERVENTIONAL - WHERE NEEDED

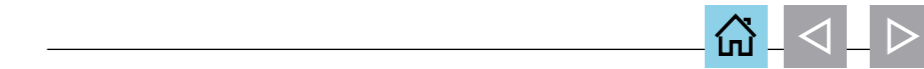
Design and intention are not enough to create urban equality – it requires strong leadership, policy and governance.

Many citizens are calling for historic ills to be addressed and backlash against gentrification needs to be managed. Agile and responsive governance is essential and looking forward, will need to be more interventional here.



**“Left to their own devices, cities can be diametrically opposed to equity. Urban economics dictates that land and opportunity is allocated with preference to the rich and the profitable in our cities, and this has a snowballing effect on wealth bifurcation. The only way that a city can avoid this is through regulation and planning, which is political. Our past planning policies have supported separation and to succeed, future planning policies would need to address this and become more interventional.”**

Richard Pickering,  
Head of Innovation – EMEA,  
Cushman & Wakefield



CASE STUDY

Landsec has played – and continues to play – a key role in regeneration projects.

We have a once-in-a-generation opportunity to improve economic productivity and drive a thriving urban landscape across the UK. Landsec’s own success is interlinked with a thriving future for a number of the UK’s cities – Manchester, Glasgow, Cardiff and Leeds – as well as London.

Landsec places huge focus on working with communities – seeking to develop urban, mixed-use neighbourhoods that cater to local needs.

We’re progressing regeneration projects in cities around the UK; O2 in Camden, Lewisham, Mayfield and MediaCity in Manchester, and Buchanan Galleries in Glasgow.

The 20m Landsec has committed through the Realising Potential Fund will enhance social mobility over the next ten years – supporting programmes that create clear pathways to employment in real estate for underrepresented groups, as well as other initiatives to tackle social inequalities more broadly.

Across the UK, Landsec is committed to helping 30,000 people – that are facing real barriers to employment – to find work by 2030.

The Community Charter that Landsec launched this summer outlines our commitments as a responsible developer and landlord - to involve and engage our communities throughout the development process and beyond, through listening and understanding, being present and relevant in our communities, involving and empowering and being held to account.

O2 shopping centre



Mayfield in Manchester



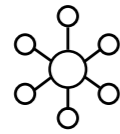
MediaCity in Salford



Landsec is committed to helping  
**30,000**  
people  
facing real barriers to employment to find work by **2030**



PRINCIPLE SIX:



# POLYCENTRIC

Sustainable cities that are well positioned for the future are Polycentric – meaning with multiple centres. They are evolving along a multi-nodal model – creating economic and social activity in a network of decentralised hubs, harnessing authentic local identity. They are growing in importance as a result of modern lifestyles and shaping the development of cities.

Polycentric cities disrupt the traditional model – whereby a city develops outwards from a single economic middle – instead promoting a series of smaller centres for accessibility, walkability and convenience.

**“Neighbourhoods and villages should be designed so people can live, work and thrive in them without having to constantly commute.”**



Nikolaj Sveistrup, CEO & Founder, Urban Agenda



A POLYCENTRIC CITY



Is made up of economically productive nodes surrounding a thriving central core



Has decentralised, local hubs – offering an ecosystem of uses that facilitates modern day lifestyles



Has many vibrant places that are distinctive in character and identity



Mixes economic and social functions, promoting walkability between them



Interconnected city regions that flourish through complementary offers



WHAT DOES THIS INVOLVE?

## 1 CREATE TRANSITION ZONES

The pandemic shifted the location of many daily activities back into local neighbourhoods.

Transition zones, between a city's geographic centre and outer limit, should now be a focus – providing citizens with social and commercial amenities for daily life easily navigated by active travel paths that can be re-programmed over time as user needs change.

## 2 FOCUS ON LOCALISM VS SCALE

Urban decentralisation can undermine the principles of urbanisation – with inward-facing economies potentially separating access to amenities for different demographics. There must be a focus on managing this – and keeping some form of connection and overall scale across all separate local centres or hubs.

Local neighbourhoods only work when the city as a whole has a metropolitan centre that thrives. A central node should facilitate diverse groups to come together – and create a crescendo or apex of energy and density.

## 3 PRIORITISE 'MODERN MOBILITY'

Transport, travel and mobility across different centres needs to be a focus. It requires economies of scale to be useful to citizens, as well as efficient for authorities to plan and operate. In addition, challenges to the revenue model of current transportation infrastructure providers are a result of the changes to commuting patterns.

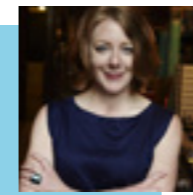
Furthermore, to meet ambitious targets for emission reductions, there needs to be a significant shift away from personal car use. As new modes of mobility and transport emerge, they will reshape cities, creating new routes between areas of living, shopping, work and other activities.

## 4 CREATE A SYSTEM OF CITIES

We need to start thinking beyond city limits – about a system of cities. Creating a robust and widespread network of urban centres – with economic, political and other ties – can catalyse innovation and desirability further than when limited within one urban boundary.

The emergence of very large urban regions, with interconnectivity and interdependence, looks set to expand in the future as the meaning of cities changes. Collaboration between authorities, to share and intertwine prosperity, will mean cities can meet the challenges of the future and continue along the pathway to prosper into the long term.

**“People choose to spend more to live in cities due to a central & dynamic place identity and their relation to it. Larger-scale gatherings/ spectacles require a centre to galvanise impact. There is also financial pressure to the culture sector if there are too many repeat offers within the overlapping '15 min cities'.”**



Sherry Dobbin, Partner (Managing & Cultural Director), Futurecity



### CASE STUDY

Landsec’s regeneration project at Lewisham shopping centre covers several of the six principles of future urbanisation.

We plan to restore and enhance the town centre’s existing fabric, creating a thriving new Metropolitan Town Centre that is more diverse, inclusive and accessible to all.

As well as paying homage to the history of the area, Lewisham town centre will also look to the future. A key part of the new design will be to retain and adapt aspects of the existing structures within our site – to help facilitate a new and dynamic multi-level landscape that will provide space to play, generate energy, food and other crucial resources.

The new town centre will prioritise a desirable, high quality life for all residents, built around a new 10,000 sq m green artery – in the form of a park.

At the apex of this green artery will be a cultural and innovation hub, which acts as a magnet. It will be a multi-use space which is adaptable to the future needs of the area, and can flex between a place for leisure, entertainment and play, to a food destination, and also a place for local Lewisham-based businesses to start up.

Lewisham will continue to become a thriving, economically productive node, integrating living, working and socialising, with a vibrant local identity that attracts businesses and people.

As a node in the interconnected fabric of the wider urban city, Lewisham functions as part of a polycentric network of places.



The new town centre will prioritise a desirable, high quality life for all residents, built around a new **10,000sq m** green artery





# CONCLUSION

**We are at a crossroads – with limited time to adapt and ensure our cities remain successful well into the future.**

Failure to take action now could result in the dystopian and problematic future outlined in Section One – where urban planning takes no heed of the environmental impact and social inequality worsens, with negative results for all.

Conversely, a coordinated and proactive plan of action – based around the Six Principles outlined – could lead us to a highly favourable scenario. These Principles recognise that a city needs to be more than liveable: it needs to be a place where people thrive.

By rethinking the city to ensure true accessibility, inclusivity, climate-preparedness and responsiveness, we can create urban places that are conducive to long-term vitality and wellbeing. Cities and neighbourhoods that can implement the Principles will be closer to achieving a future which is both positive and possible.

The future remains uncertain and unpredictable, but by exploring potential scenarios – from the dystopian to the hopeful – the aim of this whitepaper is to spark debate, and also act as a guide for those shaping the built environment.

We recognise that Landsec has a key

responsibility here. We need to be a modern developer and landlord; one that is fit for the current reality and future we face. We are now focused on fulfilling this obligation. We have a vision for the future which focuses on shaping places that create value for our customers, communities and stakeholders.

We shall continue to adapt and evolve to contribute to the debate, using our scale, expertise, and experience to meet cities' and their communities' changing needs.

**We now call for that commitment from others.**

## GET IN TOUCH

[Landsec.com](https://www.landsec.com)

Email: [Alex.Beale@landsec.com](mailto:Alex.Beale@landsec.com)



# APPENDIX





# METHODOLOGY

## I. Future of Urbanisation: Six Key Principles

### i. Analysis

To identify the key themes shaping the future of cities, Landsec's strategy team led by Alex Beale conducted an 'outside-in' research review leveraging existing futures research, and expert perspectives to determine six key Future of Urbanisation themes. The principles in this paper are a summary of expert-vetted key themes shaping the future of urbanisation over the next 10+ years.

### ii. Delphi Panel

To pressure-test the six principles, we used a respected, time-tested foresight method - The Delphi Method. This method engages a diverse cohort of experts to vet our lens on the future.

We recruited 12 experts who are shaping the future of cities from diverse and relevant backgrounds to conduct our study.

### They were:

- Adam Elman, Google
- Leon Rost, BIG
- Richard Pickering, C&W
- Sherry Dobbin, Futurecity
- Stephanie Edwards, Urban Symbiotics
- Suzanne Lopes, Jacobs
- Ellie Cosgrave, Publica
- Nikolaj Sveistrup, Urban Agenda
- Prof Greg Clark CBE
- Prof Phil Hubbard, Kings College London
- Sadie Morgan, dRMM
- Active travel expert and advisor (respondent wishes to remain anonymous)

The experts assessed each principle

as follows:

Round 1: Each expert completed a detailed written qualitative and quantifiable questionnaire to gauge each principle's future importance, score aspects of each theme in impact, and answer whether and how a city might meet each principle.

Round 2: Each expert was interviewed to gauge their agreement or dissent from the first round analysis.

### Other inputs

The principles also build on previous Landsec's strategy team research:

- i. Global Forces for Change
- ii. Future Forces

### II. The future of urbanisation:

#### Four Scenarios

##### i. Analysis

Landsec commissioned The Future Laboratory to examine the Global Forces for Change and the Six Principles for the Future of Urbanisation, alongside expert perspectives and their Foresight methodology (STEEP analysis), to come to an understanding of what a successful/ unsuccessful city could look like in the next 10+ years, and what the strategic implications are for Landsec.

The Future Laboratory's methodology determines, defines and tracks the key drivers of change affecting the future:

- Human Needs: Static and Universal
- Global Drivers: 10 years+
- Value Shifts: Ever-evolving
- Macrotrends: 3-5 years+ : Cultural and Societal Shifts
- Microtrends: 1-3 years+ : Lifestyle

A STEEP analysis of current macrotrends

and signals was used to understand how they will affect the future of urbanisation. This enabled an evaluation of the predominant principles and how their different weighting might affect the future, as well as how the interaction with the Global Forces of Change will drive the trajectory of each scenario.

### ii. Approach

The project was approached in four stages:

1. Identification and Provocation
2. Further Interrogation  
We conducted four interviews with experts on urbanisation to understand how Landsec's six key principles might play out in the future.
  - Aranceli Camargo, Director, Centric Lab
  - Usman Haque, Founder, Umbrellium
  - Katrina Johnston-Zimmerman, Founder, THINK.urban
  - Chris Murray, Director, Core Cities UK
- Expert Lessons:  
From these experts, we gained new perspectives on the six principles and how they might interplay with one another within each scenario.
3. Draft the Scenarios
4. Strategic Implications



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