

6 July 2020 bulletin

Coronavirus, communications and the built environment

#08 Green recovery convergence

[ING's eighth](#) fortnightly intelligence publication examines the elevation of climate as a key ingredient in built environment recovery. Previous bulletins have explored [culture](#), [creativity](#), [collaboration](#), [networking](#), [content](#), and [inequality](#). Environment and inequality are long-term [interconnected themes](#) gaining focus as brands, organisations, and cities explore sustainable recovery. These bulletins provide those working across property, architecture, design, regeneration, and culture a snapshot into the key narratives transforming the world's most valuable sector. [Let us know](#) how we can better collaborate in rebuilding of our sector.

A POST-CARBON WORLD?

Confirmed COVID-19 cases equal [0.13 percent of the global population](#), with over [a quarter of cases](#) in the United States. Shortly before the US [bought up most supplies](#) of a potential treatment, the WHO suggested gains made in many countries could be undermined by a [lack of global solidarity](#) and poorly implemented [contact tracing](#). After Beijing [lifted localised lockdown restrictions](#) on [11 June](#), new restrictions have been imposed on [nearby Anxin](#). [Leicester's extension](#) is the first [use of regional data](#) in the UK, providing a precedent for [future](#) rolling lockdowns. As testing data improves¹ in many nations more granular rolling lockdowns will become common enabling a more steady recovery.

1 Live data, but also historical to better understand the transmission trajectory, e.g. COVID-19 may have been in Milan and Turin as early [as December 2019](#)

A regional quarantine in [Spain linked to agriculture](#) suggests some of these will be focused on rural areas as epicentres move beyond major urban locations. Messaging encouraging communities outside of lockdown to self-manage the risk of spikes by limiting movement if transmission surges may become more common. Integrating [COVID-19 data](#) in weather reports² (as is sometimes the case with [air pollution data](#)) may increase. As tourist sectors reopen, data will increasingly be used to reduce movement from parts of the world with [higher transmission rates](#).

All of these lessons on behavioural change and mini-sanctions based on better data may impact on how the world responds to the long-term climate challenge, with more initiatives targeting people or parts of the world with a [disproportionate impact on the planet](#).

India – key to sustainable futures given how much still needs to be built – is still focused on urban growth, albeit in [smaller, greener cities](#) with better active transport. Urbanised countries like the UK will continue to satisfy the bulk of housing need in existing built-up areas as this is where stock and infrastructure are located. However, [protecting the countryside](#) may become an increasingly powerful narrative. Navigating this with new housing technologies and typologies that help integrate wider public green space, active travel, and existing built-up areas may be strategic.

2 COVID-19 has impacted on the [capacity](#) to predict weather, which may make it more difficult to anticipate [extreme events](#)

France's local elections provide the first indication of how the pandemic may have shifted urban voting preferences towards environmentalism, with green policies behind wins in Paris, Bordeaux, Marseille and Strasbourg, and an outright win by the Green party in Lyon. [Anne Hidalgo's re-election](#) may make the heart of the EU's largest urban agglomeration [largely car free](#).

Ireland's national coalition with Greens suggests [significant political compromise](#) may be needed in achieving green recovery. Germany's [€130bn recovery stimulus](#) includes €50bn for climate change, innovation and digital technology, while 25 percent of the EU's €750bn recovery fund is earmarked for [climate-friendly measures](#). The energy sector, critical to built environment sustainability, may be particularly [positioned to benefit](#). However, a growing focus on using green infrastructure [for recovery](#) will increase tensions between socio-economic development, sustainability and, as with [Ethiopia's Renaissance Dam](#), [food security](#).

As the virus spreads to less urban locations, the need for a more cohesive link between [urban and rural policy frameworks](#) targeting climate change and development will become more important. The increased [use of biomass](#) in renewable energy and materials may impact on the opportunity to use [forest cover](#) to sequester carbon, highlighting the interconnectedness of the challenge. Responses to natural disasters like [flooding](#), [wildfires](#), [storm surges](#), and [mudslides](#), during the pandemic [will be less easy](#), increasing awareness of the risks of climate change.

Expect climate justice to be a growing political test, particularly for higher emitting [wealthy nations less affected by the consequences of climate change](#), but also for greater [decision-making inclusion](#): 70 percent of climate negotiators are men. In many instances, COVID-19 will accelerate the shaming of those not taking authentic sustainability steps. In

just over a decade, several [organisations](#) and [governments](#) will consolidate carbon negative positions, widening the gap between those with credentials and those without.

BUILD BACK GREENER

In May 2019, the UK became [the first country](#) to declare a Climate Emergency, after setting the world's first [legally binding climate mitigation target](#) in 2008. This target was updated to [net zero by 2050](#) last year. A [67-day run](#) without burning coal to generate electricity on the back of reduced demand ended on 16 June. This was the longest coal-free period since the 19th Century, with renewables peaking at 36 percent of power supply. The UK Government aims to phase coal out completely by 2024, and Government expects that half the UK's electricity will be [generated from renewable sources by 2025](#). Scaling up [storage](#), [renewables](#) and [nuclear](#) may get more attention as the UK targets its last major carbon-based generation source: [gas](#).

[Infrastructure](#), particularly for [energy and transport](#), and [buildings](#) are a major contributor of greenhouse gas emissions and COVID-19 recovery creates a unique moment to strategically recalibrate an [ongoing effort](#) to [tackle climate change](#). The Prime Minister's launching of [Project Speed](#) does [not necessarily](#) increase infrastructure funding, but a review to improve UK road, rail, air and sea links could create a more cohesive approach to provision. It also positions the built environment as key to recovery. The need to spend (and build) quickly may require new methods of political brokerage with long-term impact on how local authorities [lobby for grants](#) and plan new schemes; cutting [planning red tape](#) will move to the need for more local and national public institutional capacity and private partners able to deliver. Public and private organisations able to provide easy-to-understand, [shovel-ready projects](#) distributed across the UK may be ideally placed to benefit.

The bulk of these will be based in cities given available talent and spreading cost-viability across large populations. Expect some balancing of [high-risk-high-reward](#) schemes like [Jet Zero](#) against pragmatic steps the built environment sector can take become carbon neutral. [Retrofitting initiatives](#) may be able to react quickest given an immediate need to improve the quality of buildings on climate and health grounds³. Rebooting or adding value to unexecuted or partly completed projects may also be fertile territory. The PM's [West Midlands speech](#) suggests a focus on [green technology, tree planting, climate mitigation and urban renewal](#), creating the foundation for the built environment to be central to recovery.

However, a positive return-to-the-city narrative may still be required as many in [the cultural, leisure and service sectors](#) reopen. Scotland mandating [facemasks when shopping](#) may increase pressure for their wider adoption by consumers and service providers, while positive [third-party messaging](#) around their benefit is likely to increase. Images of crowding on [beaches](#) and [city centres](#) as lockdown eases may increase calls to [make more land publicly accessible](#); social distancing also means buildings will be less able to absorb people, making parks and streets more busy. Wednesday's mini-budget may focus more on short-term consumption injection than sustainable recovery, with footfall on '[Super Saturday](#)' roughly [half last year](#) and, despite the images in London, down 75 percent in the capital. Birmingham, Manchester, and London, which reached their [highest public transport use since lockdown](#), are still only at about a third of normal use.

3 An £80m fund has been created to [retrofit buildings](#) to cut emissions and HS2 plans to [double graduate recruitment this year](#), with a focus on engineering, urban design, innovation and environment.

FROM COVERAGE TO CONTENT

COVID-19 has dominated the share of voice online and in the media since mid-March, but data suggests the conversation has become more diverse [since June](#). Google trends shows that searches are atomising to sub-topics – the stock market impacts, wearing masks and what is reopening? – and the pace of coronavirus-related conversation is slowing down.

But even as the media begins contemplating topics beyond the virus, the media itself is transforming rapidly. Magazines and papers have continued to print right through the crisis, but with consumers staying *in* rather than visiting newsstands and traditional ad revenue dropping – a combination of contracted budgets and wanting to distance brand affinity from a deadly virus – the sector will undergo significant change. The next few months may see the demise of media brands without a robust digital offer, especially those which rely on paid physical events.

This contraction may make opportunities for earned media slimmer but opens huge scope for paid partnerships with sector media brands who will be keen for innovation and engagement. This reshaping has accelerated the importance of owned media – is yours editorial, strategic, resilient, and tied to your audience's concerns? As more value capture digitises, the built environment sector will need to embrace topics like online listening, audience segmentation and SEO, while getting more inventive in developing strategic content. Navigating this successfully will require a more integrated approach to content generation.

STORMY HEADLINES

Climate change action dominated the media conversation [for much of 2019](#) and there were concerns that the urgency of COVID-19 may [derail climate change momentum](#) as countries went into lockdown. However, the noticeable [drop in air pollution and global](#)

[carbon emissions](#) – due to grounded flights, a reduction in road transport and closures of manufacturing sites – and the linking of [air pollution and COVID-19 risk](#), escalated a need for [long-term climate change response](#) to lock-in [temporary](#) air quality improvements.

As lockdown continued, the media conversation shifted to identifying ways in which governmental and public reactions to the pandemic could be strategically helpful to tackling climate change. For example, the need to make lifestyle changes to stop the pandemic may have helped galvanise people around climate action: nearly [80 percent of people](#) across the UK and USA would be 'willing to make lifestyle changes to stop climate change as big as those they've made for coronavirus'. The impact on the long-term demand and consumption of built environment assets – especially in central locations – may be substantial. It is likely the critical conversation will move beyond disposable straws and cups, and new airports, with the sustainability performance of buildings and infrastructure becoming equally important to occupiers [and consumers](#).

[Parallels were quickly drawn](#) between the two crises as momentum moved towards recovery preparation. Amongst calls for a [green recovery](#), UK national papers have focused on [consumer support](#). There are concerns, however, that stalled [COP26](#) talks may [limit the advancement of green energy sources](#) as governments seek energy security by maintaining fossil fuel industries.

There is an emerging acceptance that recovery will be coupled with climate action. A YouGov poll indicates that only [nine percent of Britons](#) want life to 'return to normal' post-pandemic, with wanting cleaner air and an increase in wildlife both highlighted. Many national papers are casting recovery as an opportunity to reform climate change policies before it is too late. However, world leaders are facing tension

between [going "too far"](#) in lockdown measures and the [gaps in climate resilience](#) the pandemic has highlighted, which may have an impact on speed and depth of public responses.

Specialist built environment media has been slower to engage directly with the implications of COVID-19 on climate change, instead focusing on the practical implementation of changing spaces to deal with the pandemic. The sector has not, however, forgotten about climate change. Last week, Architects Declare reached its one-year anniversary (with almost 1,000 practices now pledged) and was joined by a declaration from the UK's [leading contractors](#). Similarly, the Architects' Journal formally [submitted its RetroFirst campaign](#) to government promoting re-use of existing buildings through recalibrating tax incentives away from new build, policy encouraging building and material recycling, and public procurement favouring retrofitting. The Council for Tall Buildings and Urban Habitat will use its forthcoming conference to examine the long-term link [between cities and global sustainability](#).

Building Design recently [launched a survey](#) asking readers how COVID-19 has impacted the move towards net zero, with designers also questioning how the climate agenda can be [integrated into post-COVID design](#). The Design Council continues to champion the link between [sustainability, inclusivity, and design](#). Architecture, property and construction firms joined more than 200 business leaders linking up with UK Green Building Council [to write to Boris Johnson](#) lobbying for a [green recovery](#) and confirmation that strategies will align with the UK's target of net zero emissions for 2050.

CULTURAL CLIMATE CONVERGENCE

The cultural dimensions of sustainability are evidenced through not only the increase in art and design which responds directly to the climate crisis but also how the declaration

of the climate emergency has encouraged individuals and [organisations](#) to change behaviour. The next generation of [youth activists](#) has shown greater appetite for defining environmental change, and cultural institutions, galleries, artists and designers are increasingly being called upon to use their platform to help spark positive change. From [Culture Declares](#) to [public protests](#) and manifestos there is a growing sense of responsibility from the cultural sector.

Artists and designers have used their skills to creatively translate the implications and possible impact of climate change. For example, Greta Thunberg's organisation [#FridaysForFuture](#) launched a campaign underlining how natural disasters are normalised: [Our House is on Fire](#) is eerily confronting; while documentary film [Dive Tierra Bomba Dive](#) follows one young activist's fight to preserve Colombia's coral reef.

There has been an increase in exhibitions, festivals and public programmes with curators and producers seeking to show visions of the future through [literature](#), art, and design. Last year the [Broken Nature](#) exhibition at Triennale di Milano looked at the role of restorative design, while [Oslo Triennale. Enough: The Architecture of Degrowth](#) addressed architecture's role in a time of climate emergency and social diversion. The Royal Academy's [Eco Visionaries: Confronting a planet in a stage of emergency](#), brought together an international group of architects, artists and designers all responding to globally felt ecological issues, and the V&A's [Food: Bigger than the plate](#) posed questions around collective choice and sustainable consumption.

The influence and cultural currency institutions and artists have in shaping dialogues and fuelling change has not disappeared during the pandemic. As the world returns to cities, cultural institutions will continue to create content generating climate action.

Cities concentrate cultural production and will increasingly showcase how the built environment can better co-exist with nature. Helsinki's [Think Sustainably](#) encourages more sustainable lifestyle choices, while [Amsterdam Impact](#) tackles societal change through entrepreneurship. [Urban farming](#) and [bee hives](#) have found homes at major [cultural institutions](#) and landmarks as food production is brought closer; [Growing Underground](#) is housed in a former WW2 air raid shelter. [Zero waste restaurants](#) are on the rise, as is an increase in [public water fountains](#), while charging points for electric vehicles and [recycling stations](#) are becoming more common in our cities.

THE RETURN TO CITIES

As places emerge from lockdown, [any sustained pivot towards private car ownership](#) may leave the environment [worse off than before](#). Global carbon emissions have already [returning to pre-COVID levels](#). In New York City, data suggests car usage has [dropped far less](#) than subway and bus usage while Budapest's emissions have already [surpassed pre-lockdown levels](#), with Oslo, Brussels, Milan and Vienna all tracking towards 'normal' levels. A [129 percent increase in online shopping](#) across the UK and Europe, if sustained⁴, may see a long-term increase in vehicle traffic if deliveries aren't strategically consolidated.

The government's hope for a [golden age of cycling](#) goes some way to counteract the current advice to avoid public transport. New cycling infrastructure may require governance changes or using emergency pop-up lanes to limit the capacity of non-cooperative local councils to frustrate provision. Integrating e-scooters may still be medium-term with a government trial limiting it to [licensed drivers](#), but may also end a [long-term trend learning to drive later in life](#), reducing some of the stickiness associated with first driving.

4 UK logistics had its best quarter on record in Q2 [in terms of take-up](#) with expectations this will continue

A drop in public transport use may have a roughly equal uplift in mode shift to cars and active travel: in London [a third expect to shift to each category](#). An increase in London's [congestion charge](#) may be part of a range of policy decisions cities make to disincentivise private travel so public space can be used more efficiently. This, and adding more green space, and a wider [post-carbon city agenda](#), may be part of the narrative to ensure cities continue to [cluster people](#) and [advocate](#) for the benefits of density. This will require strong narratives decoupling [overcrowding and density](#). [Mixed-use schemes](#) may become more important for sustaining this in the longer-term. Intensifying land [around public transport stations](#), on [carparks](#) and on [brownfield sites](#) will gain greater attention for financial and environmental sustainability, and provide greater integration of urban assets. Any long-term drop in public transport use may also allow transport corridors to develop at higher densities.

Retrofitting may become increasingly important, from [Brisbane's stitching together of two skyscrapers](#) to Seattle converting a [shopping centre to residential](#). [Investors](#) will increasingly move to zero carbon property portfolios, and easily adaptable building typologies fitted with recyclable materials may become increasingly relevant.

PLASTIC INCONGRUITY

The competing legislative demands of public health and the environment are demonstrated by the experience of Taiwan, which in the 1980s mandated disposable tableware use in public eating places to tackle endemic viral Hepatitis. While disposable cutlery was shown to be [effective in reducing rates of infection](#) over the following two decades, it was later recognised as a major environmental problem. The Taiwan government introduced one of the [world's most far-reaching bans on single-use plastic in 2019](#), but citizens' habits have reverted to what they

consider safer behaviour, with consumption of single-use cutlery [spiking by 50 percent](#) during the pandemic.

Closer to home, the UK's ban on single-use plastic straws and stirrers, due to come into force this April, [has been delayed by six months](#) and there has been "huge demand" for single-use cups and wrapped single-use cutlery. Added to this is a huge amount of [single-use PPE](#). The historically low oil price, combined with delayed reforms, is having an [impact on the competitiveness of recycled plastics](#) against new material, potentially placing the recycling industry in distress.

A PLAN TO GREEN-LIGHT PLANNING

Having announced plans for a radical shakeup of the planning system, the government has released a large number of policy intentions, many of which are included in the [new Business and Planning Bill](#), which last week passed from the House of Commons to the Lords for consideration this week. It introduces a number of changes and will allow the automatic extension of planning permissions that were due to lapse in the last three quarters of 2020, a fast-track system for applications to extend building site working hours, and temporary measures to allow outdoor tables and chairs and licensing changes to allow off-premises sale of alcohol to support restaurants and bars.

The Prime Minister unveiled proposals for new permitted development measures intended to ["scythe through red tape"](#) and stimulate construction as part of the economic recovery from COVID-19. [Measures proposed included](#) allowing a wider range of vacant commercial buildings to change to residential use without the need for a planning application, the removal of the requirement for a "normal planning application to demolish and rebuild vacant and redundant residential and commercial buildings

if they are rebuilt as homes⁵”, and a new fast-track process to allow property owners to extend their buildings upwards⁶ by two storeys to create new homes.

The PM stated that he wouldn't let “newt counting” get in the way of construction, [causing some to question](#) his commitment to build better, greener and faster. Changes will come into effect by September following the launch a planning policy paper in July to begin consultation.

A [proposal](#) may allow greater flexibility between certain groups of use class and create a new category of “commercial, business and service” targeted at allowing flexibility of use that will aid Britain's High Streets.

SOCIALLY RESPONSIBLE INVESTING

In the first quarter of 2020, sustainable funds outperformed non-sustainable assets, with this pattern [retained during the pandemic](#). Environmental, Social, and Governance (ESG) built environment assets may become more relevant for [resilience](#) to [current](#) and future challenges.

[Over-supply of potatoes](#) in the US is the latest example in the mismatch between people and food caused by lockdowns, which has concentrated food wastage. The world produces roughly [1.5 times what it needs](#), with roughly 30 percent of food wasted annually. Converting [excess power supply into hydrogen](#) is part of a wider narrative to recycle, reuse or repurpose resources. Long-term, incremental wastage in the built environment, as with food, will come under far greater scrutiny. Tesla's [share value overtaking](#) Toyota, a far more productive carmaker, highlights the optimism

the world has for technological solutions to climate challenges. However, [reducing consumption](#), will get greater attention too.

While the UK may be more bullish on a [V-recovery](#) and China's stock market hit a [five-year high](#) on rapid service sector expansion, a [survey in China, India and Indonesia](#) found that associated uneasiness or guilt may reduce discretionary spending despite affordability not being a major concern. Brands may need to put greater effort into making consumers feel their purchases have social and environmental purpose.

SPACE FOR THOUGHT

[Information overload](#) may have a long-term impact on productivity and our ability to take on new ideas. This presents a challenge for the built environment: strategic content will become more important at a time when noise is undermining engagement. [Targeted, sharp content with a clear message](#) may become increasingly important to [engagement](#).

5 This may see retrofit opportunities overlooked.

6 The impact of this in cities, where there are more apartment blocks, may be [limited](#), with freeholders more likely to make use of this than leaseholders

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