CITY INTELLIGENCE

COVID-19: Summary of external research

01/05/20202

This newsletter series presents a digest of external research that the Greater London Authority is making available for the benefit of external stakeholders in tackling the COVID-19 crisis. These summaries have been prepared under challenging circumstances and to short timescales. They are not intended to be comprehensive and exhaustive and the do not represent the full body of evidence on which Mayoral Policies are or will be based.

Introduction and summary

This is the latest edition in a series of briefings highlighting key statistics and external research and recommendations relevant to the GLA's response to the COVID-19 pandemic. Each briefing will offer short summaries and a deep-dive into one or two topics.

This week's newsletter includes a review of possible exit strategies, as well as summaries of perspectives on the spatial Impact of COVID-19 and how COVID-19 may affect the transition to a net zero carbon economy. In addition to our usual summary of other external research and policy recommendations.

1. Review of possible exit strategy scenarios

As part of work to support the development of high-level macroeconomic scenarios, the City Intelligence Unit has been undertaking a review of the available literature of possible 'exit strategies' – i.e. how and when the country may begin to lift its lockdown restrictions.

A close look at exit strategies is in our view key to developing plausible macroeconomic scenarios. Especially as some of the early macroeconomic scenarios for the UK that we have seen are arguably based on assumptions that do not fully capture the complexity and uncertainty of exit and of fully overcoming the pandemic.

This work therefore needs to consider a range of possibilities for how government policy and the current pandemic may unfold over the coming months and years. Based on this review, a range of possible 'exit strategy' scenarios are now being developed to provide a basis for the subsequent macroeconomic work.

Many of these scenarios will be based on variations of an approach that reflects a consensus view of the most realistic way forward. This will be supplemented by alternative scenarios that explore the possible implications of failures in key elements of these strategies.

A brief overview of some key points from this review is presented here.

Entering 'lockdown'

On March 16th the UK government began the introduction of strict measures to contain the spread of coronavirus. The decision to apply such measures were informed by a range of expert scientific advice, indicating that without an immediate tightening of controls, rapid growth in infections and hospitalisations would quickly overwhelm available health care capacity. As well as showing the need for strong measures to control the spread of the virus, this work highlighted the longer-term problem facing all countries – that a future relaxing of these measures risked a resurgence of infections and the mere delaying of an unmanageable wave of hospitalisations.

Effect of the lockdown

The effectiveness of these controls on limiting the spread of the virus has been of critical interest and indications are that they have successfully reduced the rate of transmission and that the number of deaths in hospitals as a result of Covid-19 peaked around April 8th. This picture has become less positive over recent weeks as data published by ONS has highlighted the growing number of Covid-related deaths in care homes.

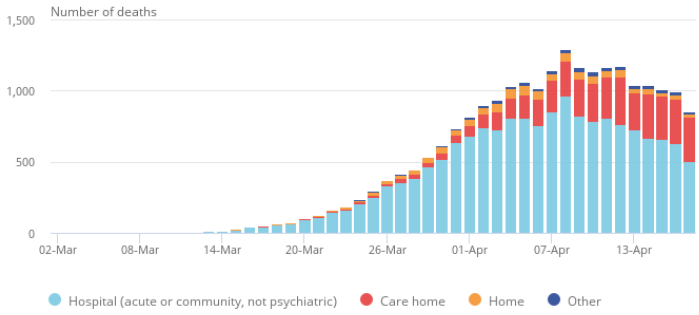


Figure 2: England and Wales: Covid-19 deaths by location (Source: Office for National Statistics)

Towards an exit strategy

While it is clear that much more needs to be done to tackle the crisis in the nation's care homes, the progress in containing the spread of coronavirus in the wider community is increasing focus and speculation on how and when restrictions might begin to be lifted.

Many other nations are now taking tentative steps towards easing the restrictions they have put in place. The challenges of determining how and when to lift restrictions is common to many countries, and many governments and commentators have set out conditions that much be achieved before doing so, and the UK government has set out its own five tests that must be met before restrictions can be eased:

1. Making sure the NHS can cope
2. A 'sustained and consistent' fall in the daily death rate
3. Rate of infection decreasing to 'manageable levels'
4. Ensuring supply of tests and PPE can meet future demand
5. Being confident any adjustments would not risk a second peak

The consensus view of possible exit strategies

The literature review has shown a fairly strong degree of commonality between proposed strategies, with the majority being variations on a common approach:

- Continuing tight restrictions until the existing wave of infections is under control and measures have been prepared to begin easing restrictions
- Controlling the disease after restrictions are reduced by:

    - Detecting and rapidly isolating those who are or may be infected. This would be achieved through effective surveillance, testing and contact tracing.
    - Adopting modified physical-distancing rules across many areas of daily life to allow activities to resume with reduced risk
- Monitoring and adjusting measures as necessary until a vaccine becomes available at scale.

Under these strategies, the lifting of restrictions requires:

- the capacity to administer a programme of large-scale testing
- development of an effective (most likely technology-based) system for rapidly tracing the contacts of those that have tested positive for the virus
- adequate capacity in the healthcare system to comfortably cope with anticipated future demands
- behavioural adaptations by businesses and individuals

The *potential* of this approach to succeed appears to be widely accepted and to a degree supported by empirical evidence from Asian nations.

Within this general approach there remains a great deal of uncertainty about:

- when the country will be in a position to beginning easing restrictions
- what specific measures will be introduced to limit the spread of the virus once we have left lockdown and how effective these will be
- when a vaccine may become available

Key literature relating to exit strategies

McKinsey: Europe needs to prepare now to get back to work—safely (April 2020)

- Exiting lockdown will be complicated and the risk of resurgence will have to be continually managed until wide-scale vaccination is available.
- Protecting lives will depend on minimising the risk of infection to the most vulnerable while keeping the health system functioning.
- Until the number of new cases falls to manageable levels infection suppression will remain the priority.
- Systems to detect, manage, and prevent new cases are vital - allow national and local leaders to determine when they can begin to ease restrictions.
- European nations can learn from Asia. Both China and South Korea have having managed a gradual release from lockdown by refining physical-distancing rules and applying effective, large-scale testing combined with contact tracing and quarantine to contain contagion chains
- European leaders should evaluate these initiatives and adapt them to local norms. Already in development are:
    - Frameworks for physical distancing as economic activity picks up, e.g. segmenting the workforce and creating physical separation over both time and space
    - Increases in testing capacity
    - Technological approaches to help trace contact that account for European attitudes to data privacy
- Local decision making would provide the greatest benefits but is challenging to implement, requiring rapid integration of national and local decisions, and effective communication with residents.

European Commission: A European roadmap to lifting coronavirus containment measures (14/04/20)
The European Commission's roadmap sets out the following conditions for easing the emergency measures:

- Infections have decreased significantly for a sustained period of time

- Hospitals have enough beds, intensive care units, medicines and equipment
- There's large-scale capacity for testing, monitoring the spread of the virus, tracing and quarantining carriers

Once those conditions have been met, governments should gradually ease restrictions along the following principles:

- Create a system for tracking contact between people using mobile apps that can warn if someone nearby is infected
- Maintain social distancing measures until there is capacity to undertake widespread testing and contact tracing
- Protective measures for older people should remain in place for longer
- Return to work must also be gradual and not all personnel should be allowed back to offices at the same time. Remote working should still be encouraged
- Gatherings of people should be progressively permitted, albeit with restrictions
- Member states should keep each other informed of their plans and take into account the situation in neighboring countries to minimise the risk of cross-border infections, and to be ready to tighten measures again if the number of cases starts to threaten health-care systems

Nature: The COVID-19 vaccine development landscape (April 9th, 2020)

- The genetic sequence of SARS-CoV-2, was published in January 2020, triggering intense global R&D activity to develop a vaccine against the disease.
- The first COVID-19 vaccine candidate entered human clinical testing with unprecedented rapidity on 16 March 2020.
- As of 8 April 2020, the global COVID-19 vaccine R&D landscape includes 78 active vaccine candidates – most at exploratory or preclinical stages.
- The most advanced candidates have recently moved into clinical development.
- Numerous other vaccine developers have indicated plans to initiate human testing in 2020.
- Vaccines based on a striking range of technology platforms are being evaluated, including:
    - nucleic acid (DNA and RNA), virus-like particle, recombinant protein, live attenuated virus and inactivated virus approaches
- Of the confirmed active vaccine candidates:
    - 56 (72%) are being developed by private/industry developers
    - 22 (28%) of projects are led by academic, public sector and other non-profits
- There is an indication that vaccines could be available under emergency use or similar protocols by early 2021.
- This would represent a fundamental step change from the traditional vaccine development pathway, which takes on average over 10 years, even compared with the accelerated 5-year timescale for development of the first Ebola vaccine
- It would also necessitate novel vaccine development paradigms involving parallel and adaptive development phases, innovative regulatory processes and scaling manufacturing capacity.

2. Perspectives on the UK Spatial Impact of COVID-19

This section summarises recent analysis on the UK spatial impact of COVID-19, both in terms of the spread of the virus and the longer-term economic and social crisis.

The crisis is likely to play out unequally across the UK. There are many variables affecting which areas are hit hardest, and the variable chosen as the focus in any analysis is likely to determine the results. Despite this uncertainty, we can still look at the key characteristics that are likely to determine how hard an area is hit.

Most analysis suggests that **cities and large towns are more likely to suffer from the epidemiological impact of the virus**: higher population densities, higher reliance on public transport and less living space per person all increase the likelihood of the virus spreading. There is already some evidence of this: King's College studied over 2 million users of the COVID-19 Symptom Tracker app and found significant evidence of 'urban hot-spots'. Whether this translates into more severe economic and social impacts in the long-run is more uncertain and depends on unknowns, such as what happens as social distancing measures are relaxed and the chosen exit strategy.

There are variables which suggest London and the South East are less likely to suffer in the long-run, such as a higher-share of secure employment, more employees who could work from home, less sectoral share in exposed industries, and a smaller share of the population being at-risk. However, **there are also variables which show no geographical pattern, and which are unlikely to favour London and the South East**, such as differential exposure of 'exporting' industries to the virus. Some of the potential features of a post-COVID-19 future that are being hypothesised (e.g. a potential acceleration of de-globalisation trends) could also affect a global capital like London more than other parts of the country. This reiterates the point that which areas are hit hardest is uncertain and depends upon which variables are the focus of any analysis.

The discussion on spatial impacts is ongoing and we will continue to monitor third party analysis.

Centre for Cities – Coronavirus Analysis (27/04/2020)

- The economic and social damage of the pandemic will be felt differently across the UK, with **cities and large towns suffering the most** due to:
    - Population density - cities have a higher population density and therefore greater potential to turn into hotspots for the spread of disease.
    - Industrial structure – in the short to medium term, around a third of the jobs in cities and large towns are in industries that are expected to be severely affected.
    - Less living space – people in cities have less living space per person than non-urban areas, making it harder to work from home.
- However, the damage will not be equal across places. **Overall, cities and large towns outside the London and the Greater South East are likely to suffer more** due to:
    - Insecure employment - although London and the Greater South East have higher proportions of self-employed people, those in the North and the Midlands are more likely to be in insecure, lower-paid roles at high risk from economic shocks.
    - Ability to work from home – London and cities in the Greater South East are more likely to be able to shift to working from home, as knowledge-intensive jobs which are better suited to doing so are concentrated there.
    - At-risk population – places in the north of the country are more likely to have an older population and lower life expectancies, indicating a higher at-risk population.
- Therefore, a place-focused economic response is needed to avoid geographic inequalities from becoming more entrenched after the pandemic.
- **However, there is no geographical pattern to unemployment impacts**, with every city having at least one in five jobs classified as either vulnerable or very vulnerable. Crawley is estimated to be the most exposed, followed by Luton and Derby. The least exposed cities are Oxford and Worthing but also the northern city of Bradford.
    - Overall, **the distinction across cities results from the exposure of their 'exporting' industries** – that is those that serve regional, national or international markets, such as aviation, in contrast to local services. The higher the number of the affected jobs in the exporting industry as a share of all exporting jobs of a city, the more difficult it is likely to be for a place to recover.

Centre for Towns – The effect of the COVID-19 pandemic on our towns and cities (23/04/2020)

- Estimate which places in England and Wales will be most impacted by COVID-19, by looking at:
    - Short-term economic exposure, measured by the proportion of employment in four exposed sectors (accommodation, arts & leisure, non-food retail and pubs & restaurants)
    - Long-term socio-economic resilience, measured by a range of data which provide insights into social wellbeing, isolation, economic prosperity, deprivation and decline for places (i.e. the Index of Economic Wellbeing)
- In the short-term, **small coastal towns, particularly in the South West, have the most economic exposure**, with over a quarter (28%) of employees in the four particularly exposed sectors (the highest being Newquay with 56%).
- Small and medium towns have higher levels of poor health and old-age dependency. However, as of yet, the relationship between old-age dependency and the number of COVID-19 cases per capita is a negative one, which may represent a positive relationship between population density and transmission irrespective of the demographics of place. Therefore, **the relative isolation and rurality of small towns may thus far be a protective factor.**
- However, overall, small towns are more likely to have low socio-economic resilience than major towns and cities, making it more difficult for them to recover economically.
- Many towns face both short- and long-term effects which will further exacerbate the need for intervention in specific communities, most notably in the South West, parts of Wales, the Midlands, North East and North West.

Henry Overman – How the UK government should respond to the unequal local economic impacts of COVID-19 (22/04/2020)

- The economic crisis will play out unequally across areas. There are key characteristics that are likely to determine how hard an area is hit, but **as there are so many factors at play (and given the unusual nature of the crisis), it is difficult to predict which will be hardest hit**.
- London and the South East have higher shares of workers who can work from home, and although there are higher shares of self-employed, those in the Midlands and the North are in more vulnerable occupations. This could suggest that London and the South East will be less affected: however, London currently has the most COVID-19 cases and deaths. It is also far more reliant on public transport. **Depending on how mitigation efforts progress and on what happens as social distancing measures are relaxed, the shock to London could be larger than other places**.
- Sectoral composition also matters. Analysis for the US of area vulnerability based on sectoral shares predicts that some metro areas will be much harder hit than others. As well as demand- and supply-side shocks, differential exposure to imports and exports, as well as decisions by big local employers, will also matter.
- In the medium run more nuanced place-based responses might be possible and it is important that we work to understand what those might be. But in the short run, due to the uncertainty, immediate support needs to be targeted through existing mechanisms to reach those people and communities that are most vulnerable.

3. Perspectives on COVID-19 and the transition to a net zero carbon economy

In the past month or so, a number of commentators have published blogs and opinion pieces on the challenges and implications of the global COVID-19 crisis on the climate and energy transition.

These implications are relevant to both the short term and the medium to long term. **In the short term, the attention of governments and public opinions are entirely devoted to bringing the pandemic under control and mitigate the impacts of the global recession**, while fossil fuel prices and carbon price tumble. Meanwhile, COP26 has been postponed to 2021 and it is not easy to predict what will happen to global emissions after a predicted fall in 2020.

In the medium to long-term, a "green recovery" is often seen as an important part of a desirable policy response (but where, at the same time, if the wrong choices that are made around investment and economic support could lock economies into carbon intensive consumption and production pathways).

This debate is going to continue to evolve and will likely move from blogs to more substantive analytical reports and academic papers. We will look at what comes out, with a particular focus on anything focusing on the implications for cities like London. In the meantime, we have picked on a few early contributions from influential commentators on clean energy and climate change policy - a business advisory perspective from Michael Liebreich (BloombergNEF), an energy and regulatory economist perspective from Professor Dieter Helm and the broader perspective on the implications for global climate change and development policies from Amar Bhattacharya (Brookings Institution) and Lord Nicholas Stern (LSE).

The views of these commentators appear to have one point in common: that there cannot be a going back to the old business as usual. By contrast, **the challenges ahead in terms of steering economist towards a more sustainable path in the wake of the COVID-19 crisis call for new policy approaches, bold choices and significant investments**.

The usual caveat applies that just because we report opinions and policy recommendations from individual authors it does not mean the the City Intelligence Unit endorses them.

Michael Liebreich (BloombergNEF) - Covid-19 – The Low-Carbon Crisis (26/03/2020)

- The combined impact of Covid-19 and the oil price war could be on a similar global scale to that of the Great Financial Crisis. **As soon as the immediate crisis has passed and attention moves to reflating economies it will be the time to ensure that clean energy, transport and smart infrastructure is at the heart of any longer-term stimulus**.
- Direct bailouts for the car industry should be avoided in favour of a big push to increase demand for electric vehicles, e.g. by requiring a switch to EVs for deliveries and by accelerating the switch of buses, taxis, shared mobility vehicles and all publicly-owned vehicles to EVs.
- **No bailout should benefit industries or business models that would not be viable in a low-carbon world**, e.g. low-cost airlines, coal-fired power generation, or uneconomic operations in shale oil and gas, oil sands and deep offshore oil.
- Direct support of renewable energy projects should be avoided as technologies like solar and wind are already cheap. Instead, money should be invested in addressing the structural issues that could hold back renewables penetration into grid (e.g. storage, smart grids and electrification of domestic heating).
- A renewed push for energy efficiency, making use of excessive capacity in the construction industry. Especially important as the incentives for investing in energy efficiency are likely to be reduced in an environment of low demand and hence low fuel and carbon prices.

Dieter Helm, Climate change has not gone away - COP26, net zero and the coronavirus (03/04/2020)

- **There is a risk that the current, inevitable pause in climate change actions and negotiations could lead to a retreat from bold ambitions** as the focus of politicians and public opinions shifts to the recession. **This would be a disastrous outcome and the best way to avoid it is the implementation of efficient climate policies**.
- The current approach to net zero of the EU and the UK, with its focus on unilateral territorial production targets, needs to be rethought, as it creates an incentive to switch from home production to imports of high carbon intensive goods and services.
- **Net zero targets on a consumption basis should be adopted over territorial targets. A uniform carbon price applied to all sectors in the EU and the UK (plus a border tax adjustment), would ensure that there is no loss of competitiveness** under this approach.
- Even when it comes to the low carbon transition, we cannot expect a return to normal post COVID-19. This for two reasons:
    - The transition is likely to be characterised by abundant oil and other fossil fuels and falling prices. In order to offset these, the carbon price would need to be raised inversely to the falls in oil prices.
    - Persistent loose monetary policy (beyond the short-term, when it is needed) could underpin excessive consumption and emissions that go with it. This could postpone the painful adjustment to a longer-term sustainable consumption and economic growth path which will need to be part of net zero strategies.
- There could be a role for targeted 'green new deal' type investments but not all new investment is going to drive down energy bills. The question is then who pays for it –either the next generation or richer customers subsidising poorer customers.

Amar Bhattacharya (Brookings Institution) and Nicholas Stern (London School of Economics), From rescue to recovery, to transformation and growth: building a better world after COVID-19 (27/04/2020)

- The COVID-19 pandemic has led to greater awareness of the importance of resilience and the dangers of ignoring the links between nature, pandemics and climate. Returning to the old business as usual is not an option.
- The demand, output and employment impacts of COVID-19 and the necessary lockdowns are expected to be much greater than in the financial crisis and could be immense in developing countries and emerging markets.
- The response to COVID-19 will fall into three overlapping phases: rescue, recovery and transformation to a new form of growth. This should be on the path to a greener but also better economy, with better health and wellbeing, greater inclusion, just transition and respect for planetary boundaries.
- **Stimulus packages must be anchored in the target of net-zero emissions and greater resilience, with supporting plans for sustainable infrastructure, pricing (including carbon pricing) and smart regulations.** They should also invest in people's health and education to boost productivity and wellbeing. Finally, they should target support to employment-intensive segments of the economy, especially SMEs.
- To enable early implementation of robust recovery packages, countries need a combination of 'shovel ready' programmes and investments; b) 'shovel ready' policies to ensure the right investments 'shovel ready' finance to match the scale of financing required. Developing countries will need something similar to a Marshall Plan, but of even greater ambition and scope. Global solidarity and leadership will be key.

4. COVID-19 external research

This section highlights external research into the economic and social impact of COVID-19.

Oxford Economics – Update on London forecasts (27/04/2020)

- OE has corrected down its March real GVA forecasts for London to –4.1% annually in 2020 and 5.6% 2021.
- Employment growth rate will now be –1.7% in 2020 and 2.5% in 2021 in London.
- Unemployment rate in the capital will rise by 2 percentage points this year while it will decrease by 0.7 percentage points next year.

NIESR – Update on UK forecasts (28/04/2020)

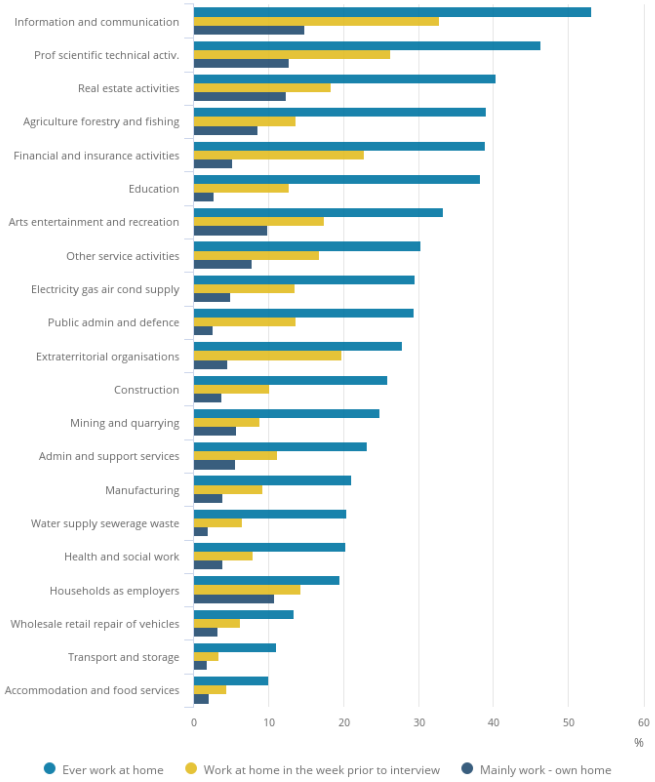
- **UK's GDP is estimated to be reduced by about 30% when the lockdown is in operation**.
- With the lockdown assumed to be in place from around the middle of March to the middle of May, UK GDP will fall by around 5 per cent in 2020Q1 and 15 per cent in 2020Q2. On the assumption of a progressive relaxation of stay-at-home measures, GDP then recovers some of the lost ground and almost re-attains its 2019Q4 level by 2021Q4 but there are significant downside risks, alongside uncertainties that cannot be easily resolved.
- On the assumption of a progressive relaxation of stay-at-home measures, UK GDP then recovers in 2021 to 6.8% and are significant downside risks, alongside uncertainties that cannot be easily resolved.
- **The unemployment rate will rise from 3.8% in 2019 to 10.5% in 2020**, before going down to 5.8% in 2021.
- It can be expected that the economy will be 3.5% smaller than it would have been after ten years.
- Global economy will shrink by 3.5% this year.
- European economies are highly interlinked so spillover effects will impact on recovery of individual economies.

ONS - Technology intensity and homeworking in the UK

- **Homeworking opportunities vary significantly between industries (see Figure 1 below), with 10% of employees within the accommodation and food services** industry reporting having ever worked from home (in 2019) **compared with 53% of those in the information and communication industry.**
- The extent to which an employee can work from home depends on whether a specific physical environment, tools, or proximity to other people are required for the role.
- Technology can be an enabling power for homeworking, providing employees have the access to, and skills required for, technology.
- The ONS E-commerce Survey shows that **in 2018, less than half of all employees were provided with a portable device for work**, except in the information and communication industry where around 60% of employees were provided with a portable device.
- The Office of Communications (OFCOM) found **superfast broadband coverage reached 95% of residential homes in the UK in September 2019**.
- In the accommodation and food services, and retail industries, over 85% of businesses using social media, used it to develop brand image and for marketing purposes.
- **Businesses with 10 or more employees were more likely to employ ICT specialists than smaller businesses.**

Figure 1: Around one third of employees in the information and communication industry worked from home in the week prior to the survey

Percentage of UK workforce homeworking by industry, 2019



Source: Office for National Statistics – Annual Population Survey

[IFS Are some ethnic groups more vulnerable to COVID-19 than others? (01/05/2020)]

IFS report on ethnic inequalities in exposure to infection and health risks and exposure to loss of income. Key findings include:

- **After taking account of age and geography, most ethnic minority groups should have fewer deaths per capita than people of a White British ethnic background**. This is because while the ethnic minority population live disproportionately in urban areas, most of these groups are younger on average than the population as a whole, which should make them less vulnerable
- After stripping out the role of age and geography, **Bangladeshi hospital fatalities are twice those of the white British group**, **Pakistani deaths are 2.9 times as high** and **Black African deaths 3.7 times as high**
- **Occupational exposure** may partially explain disproportionate deaths for some groups, including key workers and working in health and social care
- **At-risk underlying health conditions are especially prevalent among older Bangladeshis, Pakistanis and Black Caribbeans**
- **Many ethnic minorities are also more economically vulnerable to the current crisis than are white ethnic groups.** Reasons for this include they are more likely to work in a shutdown sector, more likely to be self-employed, and are less likely to have a partner who is also in work. They also have more limited savings on average.

Standard life foundation coronavirus financial impact tracker (01/05/2020)

First in a new monthly series monitoring the **financial impact of the coronavirus pandemic** across the UK.

- The study segments the UK population into four groups; the financially secure (35 per cent of the population), those potentially exposed financially (37 per cent), those currently struggling to make ends meet (17 per cent) and those in serious financial difficulty (11 per cent)
- Does not provide a full regional breakdown of these proportions, but suggests that the East, South East and South West regions are doing relatively better, with their populations under-represented among the 'struggling' and 'serious difficulties' groups
- Suggests that populations living in cities and in private or social rented housing are also over-represented among those struggling, as well as lone parents and other single adults. In addition, households whose main income is from the 'gig economy' are three times more likely to be in serious financial difficulty.

ILO - COVID-19 and the world of work: Updated estimates and analysis (29/04/2020)

- Currently (as of 22 April 2020), globally, 81% of employers and 66% of own-account workers live and work in countries affected by recommended or required workplace closures, with severe impacts on incomes and jobs.
- According to the ILO nowcasting model, global working hours declined in the first quarter of 2020 by an estimated 4.5% (equivalent to approximately 130 million full-time jobs, assuming a 48-hour working week), compared to the pre-crisis situation (fourth quarter of 2019).
- **Global working hours in the second quarter are expected to be 10.5% lower than in the last pre-crisis quarter. This is equivalent to 305 million full-time jobs.**
- **Lower-middle-income countries are expected to register the highest rate of hours lost.**
- Taking together employers and own-account workers, around 436 million enterprises in the hardest-hit sectors worldwide are currently facing high risks of serious disruption. More than half of these – some 232 million – are in wholesale and retail trade.
- **The first month of crisis is estimated to result in a decline in earnings of informal workers of 60% globally**.
- The rate of relative poverty, which is defined as the proportion of workers with monthly earnings that fall below 50% of the median earnings in the population, is expected to increase by almost 34 percentage points globally for informal workers, ranging from 21 percentage points in upper-middle-income countries to 56 percentage points in lower-middle-income economies.

5. COVID-19 external policy recommendations

This section highlights policy recommendations that have been published in the last week by influential external commentators and organisations. Inclusion in this section does not mean the recommendations are endorsed in any way by the City Intelligence Unit.

Citizens Advice Near the cliff-edge: how to protect households facing debt during COVID-19 01/05/2020

Report from the advice charity on debt. Includes a useful summary of protections from debt problems in different sectors such as water and council tax, and a series of reccomendations:

- **Ongoing protection from enforcement for coronavirus-related deaths:** including fast-track abolition of section 21 'no fault' evictions, an instruction from MHCLG to all councils to pause enforcement of council tax debts and an instruction from Ofcom to Telecoms providers to not disconnect anyone or use court enforcement to recover arrears
- **Help to repay debts sustainably:** calls on sectors without an approach to affordable repayments to introduce one, including the private rented sector, telecoms and council tax. Calls on sectors with a voluntary approach to agreeing affordable debt repayments, such as energy and water, to formalise these arrangements.

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