



Working Papers in URBAN STUDIES

This series presents work in progress from the Institute's research and consultancy programme, exploring issues of urban theory, policy and practice, especially as these relate to the regeneration of East London and the Thames Gateway. The series includes scoping papers, literature reviews, reports of findings and essays and includes work by academic staff, consultants and visiting fellows, PH.D students affiliated to the Institute.

The changing social and political significance of staging the Olympics, and gauging its legacy, is a central theme of this paper. The paper commences with an examination of why such importance is attributed to the concept of 'legacy' and then undertakes a review of current approaches and methodologies used to measure the Olympic effect; it then considers some of the experiences of cities that have recently hosted the Olympic Games and, finally, discusses the relationships between the Olympic Games and the wider regeneration of the Thames Gateway.

ISBN: 1-874210-64-0

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From Beijing to Bow Creek

GAVIN POYNTER

University of East London

**London East Research Institute
Working Papers in Urban Studies**

From Beijing to Bow Bells:

Measuring the Olympics Effect

Gavin Poynter

**March 2006
ISBN 1-874210-64-0**

Introduction

'everything will change for the better..- it will help put us on the map'

'I'm 100% for regeneration if it's for East Enders, but we have to make sure that it's not just another name for giving big business carte blanche to make a killing out of the Olympics'

'some people will win and some people will lose, like in the Olympics'¹

On receiving the news of London's successful bid for the 2012 Olympic and Paralympic Games², the media descended upon East London, particularly Stratford, to discover local people's views. Broadly supportive comments carried caveats about who might win and lose as a result of the implementation of the urban renewal programme that was associated with hosting the 2012 games. In the months following the announcement of London's victory, community and civic centres were filled with leaflets proclaiming the positive benefits to be derived from hosting the Olympics and political and civic leaders lent enthusiastic support in local newspapers and on countless TV and radio programmes.³ Olympic-related events commenced almost immediately with, for example, Newham local authority, launching free entrance to sports facilities for young people and school students were encouraged to spend their holiday time doing structured sports activities. Youth crime in the borough was reported to have fallen by 25 percent in the summer months of 2005.⁴ The positive Olympics-related 'effects', it seems, commenced within weeks of the announcement of the London bid success. So were the measured and balanced views of many local residents, typified by the comment about winners and losers, justified particularly given the catalytic impact of the announcement in generating new community initiatives and the public enthusiasm of national and local civic leaders?

Evaluating the effects of mega-events, such as the Olympic Games, is a complex affair. The economic and social costs and benefits for the host city or region are not easily estimated. The evidence available from the experience of

¹ Perceptions gathered from local people within a week of the announcement of the success of London's Bid for the 2012 Olympic Games. Source: Cohen P and I. MacRury 'Hopeful or worried but not yet jumping for joy' Some emerging themes from a pilot study of the London 2012 Bid, Rising East Online Issue no 2 August 2005 See also Carrying the Torch LERI Report 2006

² Throughout this paper, the Olympic and Paralympic Games are referred to, for accuracy, as the Olympic Games. The Paralympics are funded differently to the Olympic Games. The focus of this paper is the economics of the Olympic event.

³ In the period preceding the announcement of the bid's success, an IOC survey suggested much less support for the bid than shown by the bid campaign pollsters. As a result the bid team widely distributed a leaflet, 'Leap for East London' to help win local hearts and minds

⁴ Muir H. 'Sporting drive sees drop in crime for Olympic borough' Guardian, August 8 2005 This claim was contested by the London Crime Survey on the grounds that under reporting of crime increases during holiday periods and the direct correlation between juvenile crime and level of sports participation is historically weak.

cities that have hosted the Olympics over recent decades suggests that the positive claims derived from hosting the event, often made during the bidding competition itself, may be exaggerated. It is therefore entirely reasonable to ask who might be the winners and losers. This paper analyses what is often called the 'Olympic effect' or legacy. It draws upon the experiences of past Olympic host cities, to identify some of the key factors that will determine the economic and social impact of the Olympics on London and on a regeneration project such as the Thames Gateway development. The paper identifies the multiple factors – social, economic, political, cultural, environmental – that must be considered when the objectives and legacy of an Olympic event are explicitly related to the regeneration of a relatively poor region of a major city, as the London Olympic seeks to do⁵ and as the International Olympic Committee (IOC) requires of those cities that participate in the bidding process for the Olympic and Paralympic Games⁶. In this context, the host city aspires, and is required by the international body, to deliver an event that celebrates the highest levels of sporting attainment at the same time as delivering to a wide range of social, cultural and economic policies that are external to the sports industry itself.

In assuming this role, the Olympic Games becomes a vehicle for a wider process of social engineering or 'regeneration', a form of 'politicisation' of sport that is rather different to the types of political interventions that led to black power protests in 1968 and the boycott of the event by certain nation states in 1976 and 1980. The changing social and political significance of staging the Olympics, and gauging its legacy, is a recurring theme of this paper. The paper commences with an examination of why such importance is attributed to the concept of 'legacy' and then undertakes a review of current approaches and methodologies used to measure the Olympic effect; it then considers some of the experiences of cities that have recently hosted the Olympic Games and, finally, discusses the relationships between the Olympic Games and the wider regeneration of the Thames Gateway.

The Importance of 'Legacy'

From the time that Pierre de Coubertin founded the modern Olympics in the late nineteenth century, the Games have reflected the promotion and representation of the social and political values of their time, often reflecting the prevailing and contested values of the participant nations and occasionally providing an opportunity for protest from below⁷. For de Coubertin, the Olympics amounted to a celebration of science, reason, progress and the striving for perfection, a universalistic perspective that sought to rise above the particular interests of nations. More often, in the twentieth century, the Olympics provided an international stage for the expression of the competing ideological interests of the dominant nations; in 1936 the Berlin Olympics

⁵ London 2012 Bid Book and IOC Evaluation London 2012 Candidate City

⁶ See, for example, International Olympic Commission (IOC) (2005) Report of the IOC Evaluation Commission for the XXX Olympiad in 2012. IOC: Lausanne.

⁷ MacAloon J. 'Anthropology at the Olympic Games' in Klausen A. (ed) (1999) Olympic Games as Performance and Public Event, Oxford:Berghalm Books pp 12-13

symbolised the clash of fascism and democracy and between 1948 and 1988 the Games took place to the backdrop of the cold war. In this sense, the social and political legacy was primarily focused upon the event itself and the economic effect was less Games specific and more symbolic of the alleged superiority of a particular socio-economic system; the Olympics was a relatively small pawn in a rather larger political game. This was particularly evident in the late 1960s and 1970s when the scale and the cost of organising the Olympics appeared to exceed their value in both political and economic terms.

During the 1960s and 1970s, there was a particular problem in finding willing hosts since the cost and scale of the Games were seen to be prohibitive. When these factors were combined with political and security problems (black civil rights at Mexico in 1968 and the Israeli/Arab conflict in Munich 1972), hosting the Olympics was not perceived as a particularly attractive proposition. Arguably, 1976 represented a turning point when Montreal was the eventual winner - though even this event and the 1980 Moscow Olympics were subject to official boycotts by African nations in 1976 and the USA and 61 other nations in 1980. The African boycott arose from the participation of New Zealand, a nation that had refused to join the sporting boycott against apartheid South Africa, and the US led boycott arose from the Soviet invasion of Afghanistan. Despite these setbacks, the number of bidding cities increased dramatically from the mid-1980s with American and European cities dominating the process. Clearly, the end of the cold war facilitated the reduced likelihood of official boycotts of the kind experienced in the 1970s, but why such a change in the fortunes of the Olympics as an event that over recent decades major cities and national governments have launched huge campaigns to host?

In the United States of America and Western Europe the 1970s was the decade in which the post-1945 'golden age' of economic growth came to an end. In 1970s America, federal aid for cities significantly diminished and local governments had to seek new sources of finance for their economic development plans. City planners had a series of complex problems to tackle. First, the decline of urban industrial complexes as a focus for local employment and city identities was accelerated by recession in manufacturing and production-based industries in the USA (and UK) in the late 1970s and early 1980s. Second, reductions in federal aid meant that city governments had to seek new ways of raising funds beyond their traditional reliance on hard pressed capital budgets and traditional forms of local taxation. Finally, urban centres in cities like Chicago, Los Angeles and Atlanta had large areas of social deprivation and decay that required urgent action if they were to avoid repeated experiences of race riots and social unrest.

The more entrepreneurial US cities often located in regions most affected by de-industrialisation and economic restructuring, adopted a policy of consumption based economic development which focused on the post-industrial service-based industries (Andranovich, Burbank and Heying 2001:114). Cities such as New York and San Francisco built arts and

entertainment complexes, convention centres, museums and shopping malls as well as providing retail, professional and government office spaces (Zukin 1991). Other cities such as Miami and Orlando created what Hannigan (Hannigan 1998) has referred to as fragments of an urban landscape in which Fantasy Cities emerged that were 'theme-centred, aggressively branded, in constant operation, modular in design, separate from existing neighbourhoods, and postmodern' (Andranovich, Burbank and Heying 2001:115).

The construction of the 'Fantasy City' focuses on visitor attractions, prestigious events and themed festivals. Their construction is primarily designed to conform to the images and expectations of the visitor rather than the practical needs of those living in them. Financing their development has often generated local political and financial problems, in part because of the complex public/private financial arrangements upon which their development depends. The history of the development of event facilities and, for example, in the US context, Convention Centres, illustrates how the construction of the Fantasy City has often rested upon the dilution of the role of local government in planning processes and the removal of public scrutiny over the financing arrangements required to construct them. In this sense, consumption-based urban regeneration programmes have often been accompanied by a restructuring of local politics in order to accommodate the role of special purpose quasi-governmental agencies and the public-private partnerships that are required to create the financial framework for their implementation (Sanders 1992).

The Olympics provides a compelling prize for the entrepreneurial city that seeks a little 'fantasy' in the not too distant future. The growth in importance attributed to the Olympics as a global 'mega-event' is reflected in recent times by the huge increase in the number of cities bidding to host the event. The competition to host the games in 1992 involved just over 20 cities, this rose to over 40 cities competing for 2004 and by 2008 more than 50 cities entered the competition. The Olympics has assumed an increasing significance for entrepreneurial cities that seek to emulate the American approach to urban regeneration and development via, what economists have called consumption-led economic development. The appeal of this approach to urban renewal and development has been underpinned not only by the demands arising from domestic economic restructuring and changing patterns of consumption but also by corresponding changes in the international economy and in particular such sectors as the media industries, telecommunications, leisure, travel and tourism. These sectors have assumed global dimensions through a complex pattern of technological convergence and an associated development of mass markets for digital and satellite television, global media productions and cheap long distance travel and 'package' holidays. While Olympic event organisers may receive some immediate benefit from the selling of media coverage rights, the city that hosts the Olympics seeks to boost its image as an advanced metropolis, a 'global' city and international centre for business and commerce.

Of course, such possible gains have to be contextualised. Over recent years, each city and national government that has hosted the Olympic Games has utilised the event to achieve a combination of local and, in some cases, national goals. For Atlanta (1996), the Games were designed to provide a focus for the city to become a major international business centre, an important location for major American and international companies. Barcelona (1992) and Athens (2004) sought to rejuvenate their respective cities as centres of European commerce and tourism, while Beijing (2008) represents the shop window for a Chinese economy that is experiencing record growth rates and one that seeks international recognition for its relatively recent re-entry into the world economic system through its membership of the World Trade Organisation (WTO) and its growing reputation as the manufacturing workshop of the world.

The revival of interest in hosting the Olympics has multiple dimensions. A key stimulus for many North American and European cities has been the prospect of using the event to catalyse a form of post-industrial economic expansion mainly based on the growth of the service sector and the production industries that serve it. This 'model' emerged primarily from city planners in the USA as a response to declining federal government aid and the de-industrialisation experienced by urban centres following the protracted period of economic restructuring that commenced in the 1970s. The hosting of the Olympics, or other large scale events, was a highly visible example of the type of regeneration strategy that more often spawned new convention centres, cultural facilities, sports centres, theme parks and shopping malls in many US cities in the 1980s and 1990s. The strategy encompassed new ways of financing and accelerating urban renewal and development while also combining elements of political change and social re-engineering aimed at reducing inner-city social tensions and the potential for civic unrest.

In emerging economies, such as Korea and China, staging the Olympics signifies 'entry' into this (post) industrial world that contains 'global' centres in which local cultures and institutions combine with features of the 'fantasy' city to create a new and heady mix. Korea's successful bid for the 1988 Games represented, for example, at the international level, its arrival as a developed industrial nation, a country that sought to play down the role of its military government and enhance its ties with North Korea and its strategic role in the south Asian region. Hosting the Olympics had, it seems, the desired effect. After the Seoul Games, for example, new airline links opened and the tourism industry expanded significantly with over half a million additional tourists visiting the country in the following decade.⁸ Equally, the Chinese government is seeking to use the Beijing Olympics as a vehicle for demonstrating the dynamism of Chinese economic development and as a means to legitimate its government's international standing by pursuing several non sport-related policies aimed at improving Beijing's environment and rapidly enhancing its

⁸ One estimate indicated that about 640,000 additional tourists visited South Korea in the 8-10 years following the hosting of the event. See Preuss H. (2004) *The Economics of Staging the Olympics* pp 62-63.

housing and transport infrastructure. In relation to environmental matters, for example, it appears that such policies are having some significant effects⁹.

In summary, 'legacy' has assumed a considerable significance to the IOC and host cities and governments, especially over the past two decades, for a variety of reasons. Informed by the IOC perspective, Preuss (Preuss H 2004:7) has provided a useful periodisation of the economics of the Games and, thereby, insights into the concept of legacy. Period 1, 1896-1968, represents a phase when economic effects were poorly documented and were likely to be small for the host city because of the relatively modest scale of the Games. Period 2 (1969-1980) reflects a major time of change in the funding of the Games and their relative significance to host cities and nations. As television rights and sponsorship became very important, the 'gigantism' of the Games created opportunities and risks for the host city. While the opportunities arose from the new sources of commercial funding, the scale of the Games still demanded dependence upon federal, regional and city financial support for publicly funding Games – as the Munich Olympics of 1972 demonstrated and the financial failure of the city's public funding for the 1976 Montreal Olympics revealed.

The Moscow Olympics (1980) provided little detailed information on the economics of the event, so the third phase (1981-2003) commences with the Los Angeles Games in 1984 when the city itself declined to underwrite any financial obligations and the private sector was able, as a result, to establish the event as a primarily commercial affair through the development of sponsorship rights. Subsequent events in this phase involved a mix of public/private sector funding that tended to reinforce the commercialisation of the Games and generate, in some instances, financial corruption (Preuss 2004:8). In keeping with this commercialisation, the Games also embraced the liberalisation of its amateur regulations for participants.

The most recent phase, commencing in 2003, has witnessed a modification of the tendencies evident in the period of rapid commercialisation. The IOC developed a plan to protect the Olympics from over-commercialisation by establishing a core set of Olympic values including 'fair play, cultural exchange and ideals of equality, tradition, honour and excellence' (Preuss 2004:8). To protect these values, the IOC identified corporate partners whose own brands are required to reflect these values and, along with such partners, the IOC requires legal protection of their values from the host cities. It is through this attempt to modify the commercial dimensions of the Games, that 'legacy' has assumed a role as a central theme; increasingly informing the tenor of the bids for 2008 and 2012. Preuss' valuable insights into the economic dimensions of the Games and their influence on the development of IOC policy, might also be examined in another way. Interpreting the concept of 'legacy' in relation to the perspective of prospective host cities, particularly since 1984, it is possible to identify some propositions and paradoxes that will be explored through the remainder of this paper.

⁹ See Brajer V. and R. Mead 'Blue Skies in Beijing Looking at the Olympic Effect' *Journal of Environment & Development* Volume 12, No 2, June 2003 pp239-263.

First, the concept of 'legacy' arising from the major international sporting 'mega-event' is now firmly focused upon non sport-related outcomes as a major source of legitimation for hosting the Games. Second, cities that have bid for the Olympics, have allied their applications to economic development and regeneration strategies that tend to reflect the relatively dynamic nature of their regional and national economies (Seoul, Beijing) or the relative lack of dynamism of their economies (Barcelona, Atlanta, Sydney, Athens, London) with the latter group of mainly 'western' cities using the bid in an attempt to 'catalyze' local regeneration through the expansion of service-led consumer-based industries. Third, cities, particularly since the Barcelona Olympics of 1992, that have used the Games as a catalyst of regeneration have relied heavily upon different forms of state intervention to promote themselves as 'global' cities, a trend that reflects, particularly in the UK context, a rehabilitation of the concept of the interventionist state and demonstrates the relative dependence of several segments of the commercial sector on state-led large scale projects. Finally, the growing significance attributed to non sports-related legacies, has generated considerable debate concerning the social and cultural impact of the Olympics, with critics identifying the winners and losers arising from the inevitable process of social re-engineering that accompanies extensive schemes of urban regeneration. In this sense, despite the restatement of the universalistic values of the Olympics by the IOC, the politics of the Olympic Games has shifted, at least in part, from focusing upon the global rivalry of competing socio-economic systems to one that exposes over a period of several years the internal social strengths and schisms of the host city and nation.

Measuring the Olympic Effect

There are several difficulties in measuring the economic effect of the Olympic Games despite the existence of countless studies and reports that have been written by academics and the business world over recent decades. Many of these reports are written for clients who are preparing for or who support the bid; the reports are therefore subject to bias and the possible exaggeration of the benefits of attracting the event. Second, there are relatively few studies that have been undertaken over a sufficient time frame to evaluate longer term legacy effects.¹⁰ Third, cities experience both tangible and intangible (e.g. reputational) effects, with naturally the intangible being difficult to quantify and, finally, when cities have associated their bid to host the Olympic Games with a wider regeneration or economic development plan (e.g. Barcelona 1992, Sydney 2000, Athens 2004, Beijing 2008, London 2012), it is difficult to distinguish specific Olympic-related effects from those that might have occurred even if the Olympics had not taken place.

To address some of these methodological problems, it is perhaps useful to distinguish between the financial costs and benefits derived from staging the event – the 'one-time' primary Games related impact - from an evaluation of

¹⁰ An exception is the excellent study undertaken by Holger Preuss. See Preuss H (2004) *The Economics of Staging the Olympics – A Comparison of the Games 1972-2008*.

the longer term economic and structural changes that derive from the investment that takes place in infrastructure – transport, telecommunications, environment, social and sports facilities and housing – the secondary impact.¹¹

Clearly, over the recent history of the Olympic Games, the secondary impact has assumed considerable significance both in relation to bidding for the Games and in terms of evaluating their success.

The Primary Impact

The Funding Framework: Public/Private Mix

The Olympic Charter has gone through several amendments since the launch of the modern Olympiad. Early in the twentieth century, the Games had to be transferred, from Chicago to St Louis in 1901 and Rome to London in 1905, because of concerns about the financing of the events. More recently, the IOC has revised its Charter in order to ensure that the financial costs are underwritten by the host city and local or national state through the public purse. With the rising scale and therefore costs of the Games, the IOC has been increasingly concerned about the combination of financial inputs from the public and private sectors related to the financing of the Games – what we refer to here as the primary impact.

National Olympic Committees and International Federations are independent from the IOC and are only partly funded by it. Their engagement with the financing of the Games in a host city is only through their relationship with the Organising Committee of the Olympic Games (OCOG). An OCOG is required by the IOC to be established by the city that wins the bid for hosting the Games. It is the OCOG and the host city, therefore, that bears the main responsibility for the financial arrangements for putting on the Olympic Games. The IOC requires the bidding cities to present in their bid submission, or 'Bid Book', an estimation of the OCOG revenue and expenditure and it requires the bidding city to indicate how it would host the Games without running up a financial deficit. In this sense, the primary impact of the Games is measured by the evaluation of revenue and expenditure that arises from hosting the event.

In its attempts to address the financing of the Olympic Games, the IOC has amended its regulations relating to financial arrangements and its regulations have been subject to negotiation. The 1984 Olympics in Los Angeles, for example, produced a Host City Contract that exempted the city from meeting any financial requirements arising from a possible Games financial deficit. The Los Angeles OCOG proceeded to organise a largely private financed Games. With Atlanta, in 1996, the IOC regulations required the cost of the Games to be underwritten financially by the National Olympic Committee (NOC) and the host city, however, following negotiations the financial responsibility was

¹¹ Distinguishing these is easier in theory than practice since the impact of secondary investment is often accelerated by the need to intensify the process of completing infrastructure in readiness for the Olympic Games to take place. In this sense, secondary impacts are included with primary in the bids submitted to the IOC by candidate cities.

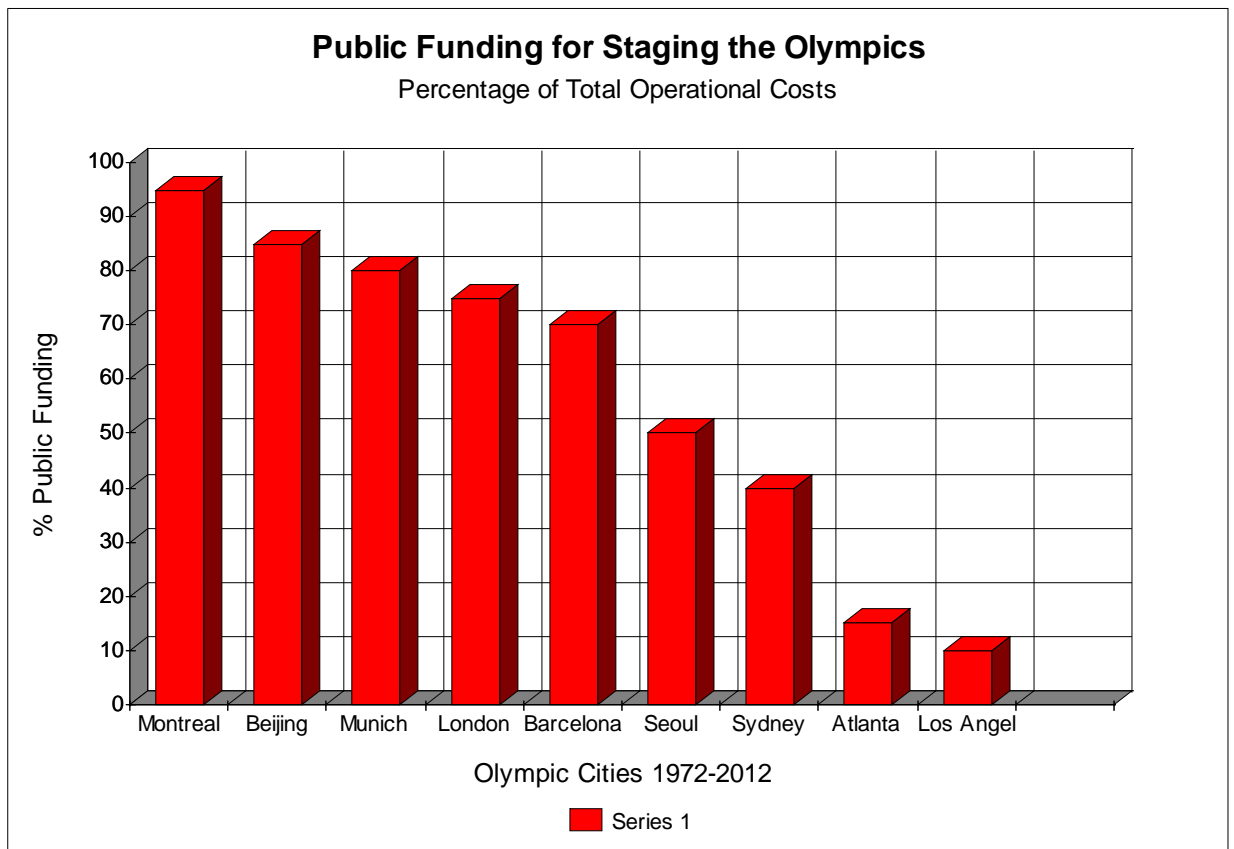
transferred entirely to the OCOG and a privately- financed Games took place. Few large scale infrastructure projects were undertaken though some new sports venues were constructed. The relatively small expenditure of approximately \$2.2 billion enabled the Games to achieve a surplus but on the Games conclusion the IOC decided that the 'down to the wire' concerns over funding would not be repeated again. In future, all Games had to be underwritten by a local, state or central government (Preuss 2004:13), with any deficit being met by such a guarantee.

In practice, since 1996, the funding of the Games has been achieved through a combination of public and private funding (Table 1) with any potential deficit being underwritten from the public purse at city, state or national level. The costs of the Sydney (2000) Olympic Games were divided between four main contributors – the national government (\$186 million); the New South Wales government (\$997.2 million); the Sydney Olympic Organising Committee (\$2,071.5 million) and the private sector (\$832.5 million).¹² Overall, the Games cost \$4.8 billion and ended making a small deficit of about \$45 million. The Athens Games, 2004, was estimated to cost about \$2.4 billion, with other significant infrastructure investment undertaken by the national government (an additional \$10 billion). The public share of meeting direct costs has been estimated at approximately twenty percent, though this seems rather low. A (Euro) 7.6 million surplus was achieved according to the Greek government. The Beijing Games (2008) direct costs have been estimated as around \$1.6 billion, again, a rather low figure, with around 80 percent of this found by public funds.

The London 2012 bid estimated the costs of organising the event to be about \$2.4 billion, with revenues facilitating a modest profit (IOC Evaluation Commission 2005:97). The London Olympic Organising Committee's costs were underwritten by a combination of the three main partners – the national government, the Greater London Authority and the British Olympics Association. Like the preceding three Olympic city hosts, the London bid rested extensively on state supported infrastructure investment; capital costs that are distinct from the operating costs. In relation to the latter, it is estimated that around seventy percent of the costs will be supported by public funds.

¹² Preuss H (2004) 2004:17

Table 1: Public Funding for Staging the Olympics
 (London and Beijing estimates)



Sources: Preuss 2004:19; IOC Evaluation Commission for the Games of 2004, 2008, 2012; London and Beijing are estimates

The primary or operational costs of hosting the Olympic Games are required to be underwritten by public funding; though the cities that have been successful in winning the right to host the Games, have stressed their capacity to balance revenue and costs.

OCOG Revenues

The Organising Committee for the Olympic Games (OCOG), established by each host city, is responsible for balancing the books. Between 1972 and 1984, OCOG revenues experienced relatively little increase (Preuss 2004:96).

Since 1984, revenues have increased significantly with the balance in income received shifting from public initiatives (lotteries, stamps etc) to private financial sources (sponsorship, merchandising, television rights and donations). As the latter, private, sources of revenue have risen in volume and importance, so the IOC has increased its share of the takings from television rights – rising from a third of the total in 1972 to around one half by 2008. The IOC manages the relationship with private funding sources through its corporate partnerships. With media partners, the IOC guarantees exclusive broadcast rights for specific territories and these relationships have been overseen by the IOC's Olympic Broadcast Service (OBS) since 2001. For each Olympic event the OBS and OCOG create an Olympic Broadcasting Organisation to oversee the production and distribution of media coverage of the Olympic event. It is the IOC partnerships with commercial companies that dictate the total income levels from television rights; for the host city's OCOG, there is little capacity to influence income from television rights so the focus is mainly upon marketing and sponsorship- the national marketing and sponsorship programme. Broadcast revenue is the most important source of income for the Olympic movement, with revenues rising fivefold between 1984 and 2008 (IOC 2005:2):

Table 2 Olympic Games Broadcast Revenue 1960-2008

Source: IOC www.olympic.org June 2005 Revenue Generation and Distribution p2

Date	Olympic Host City	Broadcast Revenue in US Dollars (millions)
1960	Rome	1.178
1964	Tokyo	1.578
1968	Mexico City	9.750
1972	Munich	17.79
1976	Montreal	34.86
1980	Moscow	87.98
1984	Los Angeles	286.9
1988	Seoul	402.6
1992	Barcelona	636.0
1996	Atlanta	898.2
2000	Sydney	1,331.5
2004	Athens	1,494.0
2008	Beijing	1,706.0 (estimate as at March 2005)

By comparison to the sale of media rights and marketing and sponsorship, ticket sales for the event, have become less significant as a source of income for the OCOG. Whilst the Olympic events in the 1950s relied heavily upon ticket sales as the main source of revenues (between 60 and 80 percent of total revenue), by Sydney 2000 ticket sales as a percentage of total revenue fell to about 23 percent and estimates for Athens and Beijing suggest that this percentage will fall even further to less than 12 percent.

Finally, on the revenue side, the Olympic-related economic impact upon the host city has been particularly reliant for a favourable longer term outcome on what has become known as event tourism. The multiplier effect of event tourism is one of the key longer term legacies that Olympic cities have sought to benefit from, especially since the success of Barcelona and Seoul. The Sydney Olympics reflected this strategy with the national and city governments seeking to promote the image of Australia as a vibrant tourist destination.¹³ Measuring the multiplier effect, however, is not straightforward. The rise in tourism may be measured by for example, calculating the number of additional visitors before, during and following the event, their length of stay and their patterns of consumption. However, such evidence has to be set against, for example, the displacement of tourists from other regional and national attractions and those who leave the city during the event period and those who refuse to make an otherwise planned visit because they fear being 'crowded-out' (Preuss 2004:55). Nonetheless, the tourism legacy is considered to be an important component of Olympic-related revenues, with many recent host cities reporting significant upgrading of hotel and tourism infrastructure and lasting positive benefits for sectors such as the conference, exhibition and convention trades.

OCOG Costs

The cost side of the balance sheet for each OCOG differentiates between Games-related and Non-Games related expenditures. Where significant investment in infrastructure is a component of the host city bid, this infrastructural cost – a significant component of the 'secondary' impact – is excluded from OCOG expenditures. Instead, the OCOG balance sheet reflects what is referred to as location costs which include the costs of construction for temporary buildings and 'overlays' (improvements required to make existing buildings suitable for purpose), rent for existing sites and the costs of 'pulling forward' the construction of sports facilities that will be utilised after the Games but whose construction was brought forward to accommodate the staging of the Olympic event. This cost is typically measured in terms of the lost income from the long term interest rates on sums invested earlier than they would have otherwise been. Other relatively modest OCOG costs include sports equipment and its installation; test events, opening ceremonies, victory ceremonies and cultural events that take place in the period leading up to the Games. A further series of costs are incurred that are often more difficult to measure and evaluate. These relate to the installation of the technological infrastructure for the Games – including the broadcast centre; the costs of security and insurance, the cost of travel, medical support and accommodation for participants and the various administration costs (including public relations, and corporate design) associated with the whole event.

¹³ See New South Wales Government (2005) Economic Impact of the Sydney Olympic Games Executive Summary. http://www.treasury.nsw.gov.au/pubs/trp97_10/exe_sum

In summary, the revenue/cost balance sheet that reflects the calculation of the primary effects of the staging the event is extremely sensitive to socio-economic factors that are specific to the circumstances of the host city; often bidding cities have under-estimated the cost side of the equation. Olympic cities may achieve tangible and intangible costs and benefits, with the value of the primary (event-related) economic impact appearing to rest largely upon the longer term strengthening of tourism and the infrastructure and industries that support it.

The Secondary Impact

The primary impact relates to Games-specific revenues and costs; the secondary impact refers to the infrastructural investment and subsequent urban development that provide the substance to the post-Games legacy. When cities prepare their bid book in the competition to host the Olympics, the IOC is particularly concerned to evaluate the long term legacy proposals in relation to existing urban regeneration and development plans. As with the London 2012 Bid, a city's long term legacy proposals are more likely to receive a favourable evaluation by the IOC when they are linked to existing regeneration or development plans such as those involving the Thames Gateway.

As indicated above, some cities, such as Los Angeles and Atlanta, had very limited goals in relation to the longer term legacy of the Games. There was relatively little infrastructure investment associated with the 1984 and 1996 Olympic events. By contrast, Seoul, Barcelona, Sydney and Beijing exemplify cities that have directly linked the post-Olympic legacy with extensive schemes of urban renewal and/or economic development. In this context, the hosting of the Olympics may assist a city to achieve a number of goals. First, the Olympics tend to provide a catalyst for accelerating the process of urban development and renewal. It has been suggested, for example, that Munich (1976) attained developments that would have normally taken approximately 15 years, in a time span of 6 years. In Barcelona, it is suggested that the city saved 10 years in accelerating the pace of renewal. Second, the Olympic timescale for completion helps cities to overcome the rigidities of planning processes and political structures, often circumventing those procedures that may impede rapid change (Preuss 2004:68; Burbank et al 2001) and, lastly, the hosting of the Games attracts private investors from several different industrial sectors who might not otherwise be brought together to support a city's regeneration.

As early as 1933 the IOCs 'Charter from Athens' required Olympic events to provide 'Housing, Labour, Recreation and Transportation'. Since the 1970s, these features have been joined by an agenda for urban development designed to generate inner-city projects aimed at the alleviation of social deprivation and catalysing new forms of economic development. The secondary impact relates to the investment that is not exclusively Games related. This investment typically breaks down into infrastructure development (transport, telecommunications, sport facilities), environmental improvement

(decontamination, water usage, parkland etc)¹⁴, post-Olympic usage of permanent facilities (housing, health, exercise, parks) and the contribution to the development of what has been called the 'urban culture' (leisure, recreation, entertainment facilities)¹⁵.

In the absence of longitudinal studies that have identified and quantified the secondary impact using consistent approaches to the classification of data, it may be useful here to focus on cities that have concentrated upon the catalytic effect of the games on urban development and renewal. The table below (Table 3) provides some estimates of the investment that has taken place in cities that have sought to maximise the secondary impact of the Games on urban development:

Table 3: Non-OLOG Investment Selected Olympic Cities 1992-2012

Sources: Report of the IOC Evaluation Commission for the Games of the XXX Olympiad 2012; Brunet F (1995) An Economic Analysis of the Barcelona 92 Olympic Games; Auditor General's Report to Parliament 2002 Volume 2 'Cost of the Olympic and Paralympic Games' Sydney: NSW Government 2002.

Olympic City	Infrastructure Investment – actual sums (Billions - US Dollars)	Sources of Investment: Public Sector (percentage of total investment)	Sources of Investment: Private Sector (percentage of total investment)
Barcelona 1992	8.012	61.5	38.5
Sydney 2000	3.03	64.4	36.6
Beijing 2008*	14.257	85.0	15.0
London 2012*	13.7	64.2	35.8

*Beijing and London are estimates based upon the original bid book and subsequent amendments to projected infrastructure developments. In the Beijing case, the Beijing city authority and central government revised downwards infrastructure development plans by scaling back the number and range of permanent sports venues being created. Beijing held several events for overseas investors interested in investing in infrastructure development in 2003-4, encouraging investment according to market principles. Prior to the cut of about 25% in the construction budget, the Information Office of the Chinese government estimated total infrastructure development costs at 33\$ billion. It is difficult, however, to differentiate investment levels that are Olympic-related from those that may have taken place irrespective of Beijing achieving host city status. See Cousins S. (2004) 'Beijing Cuts Olympic Costs' Business Beijing, Beijing: Information Office of the Beijing Municipal Government <http://www.btmbeijing.com>.

In the cases of Barcelona, Beijing and London, investment in infrastructure was, or is projected to be, significantly higher than the Games-related costs – between four to eight times higher. In the case of Sydney, infrastructure costs

¹⁴ the Olympic Charter was amended in 1991 to include environmental issues (Lenskyj : 2000)

¹⁵ It should be noted that temporary facilities – those removed on completion of the Games – are included in the primary Games-related costs and not the secondary non-Games related legacy. Again, in practice this divide is difficult to measure since some facilities are modified for post-Games use.

of \$3.3 billion were of a similar magnitude to the event-related costs of \$3.45 billion.

The variation in the level of investment that produces the secondary impact affects the scope of the legacy. For example, the scale of investment in Beijing suggests that the legacy will have an impact in all four IOC recognised legacy areas – infrastructure (transport, telecommunications, sports facilities), environment, post-Olympic usage of permanent structures and in the long term availability of leisure, cultural and entertainment facilities. By contrast, the Sydney Games had a relatively small environmental impact, confined to improvements in sea defences and the remediation of the Homebush area in which the Games took place. But the problem of evaluating the secondary impact is not simply a matter relating to the scale of investment, though the scale adds to the complexity of the task. The key to a consistent analysis lies in defining clearly the level of the study, the scope or range of items to be included and the assumptions made in identifying the indicators or measures of the costs and benefits accrued.

The level of the study may be defined or scoped in relation to the net impact upon a city, regional or national economy; in this case problems exist in distinguishing a city's economy from the region or national economy in which it is located. In a smaller nation such as Greece, the national impact is perhaps easier to evaluate than it is in relation to say the Beijing Game's impact upon the wider Chinese economy. Equally, the range of items included would need to distinguish between those activities that were exclusively Games related and those that were not. An extract from the Auditor-General's Report on the Sydney Games illustrates this point:

Repair of the Farm Cove seawall in the Royal Botanic gardens is just one small case. The seawall was badly deteriorated, with resulting damage to the adjacent roadway. Repairs would have been made at some stage, but because the roadway was part of the Olympic marathon course, they were made before the Games. Should this be treated as an Olympic cost? Should the costs be calculated as the interest lost from spending the funds earlier?
Source: New South Wales Attorney-General's Report to Parliament 2002 (2002:3)

When identifying the measures of costs and revenue in legacy terms, it is important that an analytical study does make clear its assumptions. In establishing the cost of the repair to the seawall at Farm Cove, it is justifiable to assess the cost as measured by the interest lost providing that the same level and quality of work would have been undertaken with the only difference being the accelerated timing of the repairs. In this sense, the 'cost' of the catalytic effect of infrastructure development may be quantified. Equally, on the revenue side, the improvement to infrastructure may clearly have an earlier affect when urban developments plans and improvements are brought forward. In this case, it is important that beneficial impacts in relation to, for example, increased tourism in the post-event period have explicitly defined

parameters in terms of measuring the multiplier effect of the increase in the tourist trade¹⁶.

The multiplier may be used to quantify both primary and secondary effects. In the pre- and actual event phases, the multiplier relates to the direct expenditure associated with hosting the Games - the purchase of tickets, media rights, the construction of temporary facilities, and the indirect expenditure undertaken by tourists and visitors. The combined direct and indirect expenditure provides the basis for evaluating the induced expenditure – the effects caused by spending the direct and indirect expenditures again¹⁷. In the case of the post-Olympic or secondary effect, it is possible to measure the multiplier in terms of, for example, the management and use of the legacy facilities, the rise in visitor numbers, the effect on the local labour market and the value of the attractions of the post-Olympic park. These provide some indicators of the long term economic impact of the Games on a city or regional economy. They are, however, only indicators since the measurement of the long term economic impact cannot be disaggregated from events in the wider economy of a region or nation nor can they be measured effectively against a scenario in which investment and infrastructure development may have taken place even if the city had not hosted the Games¹⁸

Economic impact studies provide some guidance to the overall legacy of hosting the Olympics; where infrastructure investment is considerable the period of impact is longer, according to Preuss (Preuss 2004), about eighteen years. The longer the duration of the impact, the more susceptible is the city economy to broader fluctuations in the regional and national economy. If the broader economy is in recession, the ‘crowding out’ effect is less likely, equally, where a city or national economy is expanding rapidly the Games effect may be to contribute to rising prices – particularly land and house prices. Impact studies seek to capture the tangible effects of the Olympic legacy, though they offer only approximations, they provide a useful guide to fluctuations in economic performance and costs and benefits arising from hosting the event.

¹⁶ For example, estimated ‘total’ visitor spending includes expenditure on items the income from which may go directly to a supplier based outside the Olympic city, region or country. A more accurate measure, therefore of visitor spending is based upon that which is ‘captured’ in the city, region or nation – known as the capture rate. The capture rate is typically measured by use of formulae that seek to estimate the effective spending power multiplier.

¹⁷ The multiplier effect is a form of economic modelling favoured by impact analysts. There are a number of multiplier modelling techniques based upon cost/benefit and input/output approaches. The USA’s National Association of Sport Commission (NASC) has published an extensive list of impact formulas used in US studies (See Lee S (2001) ‘A Review of Economic Impact Study on Sport Events’ The Sport Journal Volume 4, Number 2.) The multiplier model application is only useful when the assumptions underlying the model are clearly spelt out. Typically the order of the multiplier effect is most useful when it does not go beyond ‘second order’ effects. For example, the Olympic event attracts an increase in tourism. In turn, tourists buy food and food outlets increase the volume of orders from food suppliers. The multiplier ripples down the whole food supply chain but the further the analysis seeks to quantify the ‘Olympic effect’ upon the extended food supply chain the less accurate or worthwhile it becomes.

¹⁸ In cost/benefit analysis this is referred to as the ‘no change’ scenario and is used as a reference point for ex-ante evaluations of project development options.

The secondary impact also involves the less tangible (reputational) effects of hosting a Games and a socio-cultural legacy that has several dimensions. In this context, Barcelona (1992), is worthy of brief consideration. Barcelona's nomination for hosting the Games was preceded by the creation of an urban development plan. The success of the bid provided the catalytic effect for implementing the plan with several significant outcomes.

First, Barcelona's urban spaces became more differentiated, leaving the city with more clearly defined economic areas for the conduct of business and commercial activities, particularly activities associated with the influx of the 'new' service industries. In the period 1988-91 over 600,000 square metres of office space was constructed (a growth in total office space of 21%), placing Barcelona ahead of Brussels and Madrid in terms of office construction. growth rates. Second, the creation of ring roads around the city – the Dalt and Litoral – dramatically changed the pattern of circulation of motor vehicles and further contributed to the differentiation of the city's urban spaces. Third, Barcelona experienced a housing development boom between 1986 and 1990 with the value of houses rising by over 280% for new properties during that period and existing houses by about 240%. The boom also served, however, to reinforce social divisions between richer and poorer areas and it came to end quite abruptly after 1992 as housing from the Olympic village came onto the market. Finally, in relation to employment, the effect of the Olympic Games, particularly through generating new jobs in the service sector, has been calculated as adding about 20,000 'permanent' or non-Olympic jobs to the Barcelona economy. (Brunet 1995) These broadly favourable secondary effects, ensured that Barcelona provided an important reference point for, particularly 'western', cities that sought to host the event in the twenty first century. For Barcelona, the Olympic bid related to an existing urban development plan. The catalytic impact of the bid provided an opportunity for the city to attract significant levels of private and public investment, establish new service sector industries and use its geographical location to provide the bridge between its northern European neighbours and southern Europe, precisely at the time of the launch of the single European (EU) market in 1992.

Evaluating the Intangible

Whilst the main focus of economic impact studies is the tangible, using cost/benefit analyses, Olympic host cities have also identified intangible costs and benefits. Some analyses have suggested that host cities benefit more from the intangible rather than the tangible.¹⁹ This is particularly evidenced in terms of branding and marketing a city and the achievement of enhanced civic or national pride as a result of staging a successful Games. There is, indeed, a compelling argument that a city capable of warmly welcoming a huge and diverse range of nationalities for a mega-event is one that deservedly earns a reputation for a kind of 'street-level' internationalism – a spirit that counters the negative correlation often made between sporting events and expressions of

¹⁹ See, for example, Porter P. (1999) 'Mega Sports events as Municipal Investments: A Critique of Impact Analysis', in Fizek J, Gustafson E and Hadley L (eds) *Sports Economics: Current Research*, Westport: Praeger

nationalism or racism.²⁰ The intangible, like the tangible, varies in its identity through the pre-event to the post-event or legacy phases. In the bid period, the IOC requires evidence of support from the bid cities populations. Popular support may be continuously tested by public opinion surveys and by public willingness to contribute, through, for example, taxation and lotteries, to the cost of staging the Games. Atkinson et al (2006) have provided useful evidence, for example, that people in three cities of the UK are willing to contribute to hosting the 2012 Games. Their study used a statistical analysis of Willingness to Pay (WTP) that suggests that about £2 billion may be raised in this way from across the UK.²¹ Equally, the willingness to pay may weaken over time, especially if contributions continue well beyond the staging of the event itself.

Atkinson et al (2006) also identify the types of intangible benefits and costs arising from the hosting of the Games. On the benefits side, national pride, enhancing awareness of disability (through the Paralympics), inspiring children, the legacy of the sports facilities, environmental improvements, promoting healthy living and the impetus to cultural and creative industries and events are cited. On the cost side crowding, security, local disruption caused by construction, transport delays and excessive media coverage are identified. Some of the above are associated with any infrastructure or construction development. Equally, intangible costs may arise from the displacement effect, the opportunity costs that may arise from investment not taking place elsewhere. Despite these provisos, the 'intangible' is clearly worthy of careful consideration, with different qualitative research approaches available to be used to capture the changes in public opinion, particularly in contexts where there may well be different public expressions of support or opposition that may arise from the splintering or dividing of communities between those who directly benefit and those who feel they are losing out.

Summary

In summary, the measurement of primary and secondary impacts of hosting the Olympic Games is a complex affair.²² The legacy is short and long term, tangible and intangible. Preuss has called this the impact matrix (Preuss 2004:26). A modified matrix, expanding on Preuss's presentation, is set down in Table 4. The various components of the legacy have assumed increased significance for cities that have bid to host the Olympic Games since the event in Barcelona in 1992. The 1992 Games was the first to take place in the post-cold war epoch and has, arguably, come to symbolise the post-ideological

²⁰ There is an extensive literature on this question. See, for example, Carrington B., P.Gilroy and I. McDonald (2001) 'Race', Sport and British Society. London: Routledge.

²¹ See Atkinson G. S.Mourato and S.Szymanski (2006) Are we Willing to Pay Enough to 'Back the Bid'? Valuing the Intangible impacts of London's Bid to Host the 2012 Olympic Games. London: London School of Economics and Political Science. Mimeo.

²² The International Olympic Committee introduced in 2001 its own Olympic Games Global Impact (OGGI) programme to identify a series of measures to evaluate the impact of the event. An OGGI has become a required deliverable from the host city with the study commencing 2 years before the event and impact measurement continuing for a further 9 years after the event. Four stages make up the study – the conception of the bid, the organisation of the Games, the event itself and the closing phase which is completed with the dissolution of the Organising Committee.

Regeneration and the Olympic Legacy: London 2012

The London 2012 Games is focused upon East London and is aimed primarily at a programme of urban regeneration and renewal, especially in the Lea Valley area adjacent to Stratford in the borough of Newham. Newham like its neighbouring boroughs such as Hackney and Tower Hamlets has significant areas of social deprivation and several 'brownfield' sites that were once the scene of traditional manufacturing industries, docks and railroad yards. The area is already at the centre of Europe's most ambitious regional regeneration programme – the Thames Gateway scheme - as well as being adjacent to the Canary Wharf and Docklands development area. Thames Gateway consists of 81,000 hectares of land (about 3,800 hectares of which are designated as brownfield). It stretches 43 miles eastwards from London's Tower Bridge along the Thames estuary and contains a population of about 3.3 million people.

Canary Wharf is adjacent to the City of London and represented an ambitious scheme set up in the 1980s to expand the city's financial centre eastwards, emulating the success of the Manhattan development in New York undertaken in the 1960s²³. The scheme, overseen by the London Docklands Development Corporation (LDDC) circumvented local authorities and established planning frameworks to afford developers opportunities to invest in extensive high rise office development and upmarket housing. This 'market driven' pro-business initiative eventually succeeded in attracting major companies to relocate to Canary Wharf but not until several financial crises were overcome. While Canary Wharf was undergoing development in the 1990s, the Conservative Government responded to pressures, mainly from the business community, to establish a London-wide or metropolitan authority. The Conservatives set up a Government Office and a cabinet sub-committee for London in recognition of the need to establish a more planned and integrated approach to running the capital. On Labour's return to government in 1997, it took this approach much further by setting up the Greater London Authority (GLA), establishing the elected office of Mayor of London and introduced a London Development Agency (LDA). It was the Mayor (Ken Livingstone) in conjunction with these newly established agencies that provided strong political support for the generation of London's Olympic Bid.

The Thames Gateway scheme was initiated in 1990 by the South East Regional Policy Guidance plan formulated at the time of the Conservative government and was championed by the then Secretary of State for the Environment, Michael Heseltine. At that time, regeneration was focused upon a region that had suffered major decline in areas of traditional employment – docks, dockyards, manufacturing – and a shortage of affordable housing for

²³ Poynter G (1989) 'Wall Street on the Water - Employment Patterns in London Docklands', London: South East Region Trades Union Congress (SERTUC).

its resident population. The decision in 1991 to route the Channel Tunnel Rail Link through North Kent and into central London via Stratford, provided an important catalyst for improvements in road and rail infrastructure and by 1995 the Thames Gateway Task Force drew up plans for 30,000 new homes and 50,000 new jobs being established in the Thames Corridor by 2021 (Buck, Gordon, Hall, Harloe, Kleinman 2002:84-5). Since 1997 successive Labour governments have continued to provide vigorous support for the Thames Gateway scheme through the Office of the Deputy Prime Minister (ODPM) and a variety of partnership agencies, including the Mayor's Office, the GLA and LDA and all the local authorities located within the region. The ambitions for the development of the Thames Gateway have correspondingly risen with, for example, the proposal to develop a new bridge crossing the Thames and an expansion of plans for house building and the development of new townships along the Thames corridor. These plans have been incorporated into the Labour government's 'Creating Sustainable Communities' (2003) in which the number of new houses to be built increased to 120,000, and many of these located in fourteen 'zones of change'.

The staging of the 2012 Olympics in East London has to be placed within the context of these wider regeneration plans. Indeed, the success of the London bid has generated increased interest in the Thames Gateway development plan. The Gateway had received relatively little wider public recognition before the Olympic bid partly because of its lack of identity as a region with which the public could identify – it cuts across local authority boundaries and does not have the historical association with the names of counties or councils with which a significant proportion of the public could identify as places in which they live and from which they receive services.

The Bid

The London Bid was well crafted within the framework set down by the International Olympic Committee. The Games-related, or OCOG, budget provided for an expenditure of \$2.46 billion. This sum was to be spent on sports venues (17% of total expenditure); technology (18%), transport (8.5%); Games workforce (8.5%) and administration (10%). Overall, the OCOG budget was designed to break even. The non-OCOG, secondary expenditures proposed amounted to \$15.8 billion with about \$2.1 billion of this directly related to the Games.²⁴ Of the \$15.8 billion, about \$8.8 billion was to be financed by the public purse, including using existing and new lottery games. Of the proposed 33 sporting facilities, 15 already existed, 9 were to be constructed as new permanent facilities and 9 were earmarked as temporary facilities. The London Bid received a favourable IOC evaluation, with only one key area – transport – causing some concerns though the Evaluation Commission felt that this potential problem could be overcome by the concentration of the Games in the East of London.

The London bid was considered to be second or third favourite behind, Paris and Madrid, when in July 2005 the final presentations were made to the IOC

²⁴ Report of the IOC Evaluation Commission for the Games of the XXX Olympiad in 2012 (2005: 69)

in Singapore. London's success was attributed to its focus on urban regeneration and the importance attached to the sporting legacy to be provided for generations of young people as Jack Straw (Secretary of State, Foreign and Commonwealth Office) commented in parliament on the day following the announcement in Singapore:

London's bid was built on a special Olympic vision. That vision of an Olympic games that would not only be a celebration of sport but a force for regeneration. The games will transform one of the poorest and most deprived areas of London. They will create thousands of jobs and homes. They will offer new opportunities for business in the immediate area and throughout London....One of the things that made the bid successful is the way in which it reaches out to all young people in two important respects: it will encourage many more to get fit and to be involved in sport and, whatever their physical prowess, to offer their services as volunteers for the Olympic cause.

Source: Hansard, House of Commons debates 'London 2012 Olympic Bid', 6 July 2005.

Straw's statement provides a compelling interpretation of why London's bid was successful with its emphasis on non-sports related outcomes and its focus on using the games as a vehicle for the pursuit of non-elite participation in sport and exercise. These values struck a cord with the IOC, in its post-commercialisation phase, and were consistent with the prevailing values of the UK government's own health policies and its appropriation of sport as a vehicle for the articulation of 'new' Labour's social values and policies, including its commitment to social inclusion.²⁵ In this sense, the government's attachment to the Olympic event as a vehicle for the promotion of its own political and social policies presents a significant challenge to those implementing the regeneration agenda in east London. The achievement of 'a successful games' has become closely associated with the effective construction, preparation and holding of the event and the attainment of a transformative legacy that impacts upon East London and the wider Thames Gateway. In the final section of this paper, the economic, cultural and social dimensions of this challenging agenda are explored, occasionally using the Beijing preparations as a point of reference and comparison.

The Regeneration Game(s)

Evaluating the success or otherwise of hosting the Olympic Games typically has three main dimensions. First, was the event effectively prepared for and delivered on time and to budget? Second, was the event itself a success with major sporting achievements being attained along with smooth and effective

²⁵ Labour's commitment to sport was reflected in its renaming of the Department of Heritage as the Ministry of Media, Culture and Sport in 1998. This commitment has been critically evaluated as successive Labour governments have, some argue, used sport as a vehicle for the expression of their own therapeutic and paternalist social policies including projecting social cohesion around the superficial representation of a 'new' national identity. See, for example, Soundings (1999) *These Sporting Times Issue 13 Autumn 1999*.

organisation? Finally, did the Olympics leave 'white elephant' facilities or a legacy that was transformative for the region or city that hosted it? Even in the aftermath of the Olympics, these questions do not afford easy or straightforward answers; quantitative analysis provides important but partial insights and the qualitative dimension is capable of multiple interpretations since the potential inheritors of the legacy themselves often have different and conflicting interests. The initial period of London's preparations for the Olympics, illustrate the inevitably contested nature of such a 'mega' project's development and eventual legacy.

The London Olympic event is overseen by the London OCOG, Chaired by Lord Coe. The OCOG board has ministerial representation from Tessa Jowell, Minister for Media, Culture and Sport, Colin Moynihan, Chair of the British Olympics Association as well as Ken Livingstone, Mayor of London. This board has a plethora of institutions and committees beneath it each with specific responsibilities. These include - the Olympic Delivery Authority (responsible for the 'delivery' of the event), the London Development Agency (with responsibility for purchasing the land required for the Olympic park) and Transport for London. Alongside these agencies sit local authorities, community and business interests and a range of sub-committees and groupings.

Within the first year of 2012 preparations, concerns over costs have emerged. The infrastructure developments planned already for East London now have tight time limits for completion and include, for example, new road and rail links, the construction of forty bridges and the placing of overhead power lines underground. The costs of providing the main sports facilities – the Olympic stadium and aquatics centre – and the media centre is budgeted at £690 million, a relatively modest sum. In tacit acknowledgement of this, the London OCOG has sought to 'value engineer' the Olympic site, bringing the aquatics and media centres into closer proximity to the new Stratford City development. Equally, the LDA has run into some difficulties in relation to the purchasing of the land for the Olympic park, with compulsory purchase orders on local businesses attracting adverse publicity. The reconfiguration of the Olympic site has assisted the LDA in reducing the number of compulsory purchase orders and thereby reducing the disruption to local businesses. Approximately a third of businesses have been saved from relocation or closure by the amended plans.²⁶

The process of adjusting bid book projections is a familiar exercise for host cities. The Athens 2004 experience courted disaster, with construction projects starting late and costs escalating as the completion date moved closer. In Beijing in 2001 the OCOG indicated its intentions to reign in costs and establish a more 'frugal' approach to investment. This was reflected in 2004 with plans for five new Olympic venues being scrapped and a revised Olympics construction plan being devised. At the same time construction of the national stadium was halted and a revised and rescaled development agreed for completion in 2007, rather than the initially proposed date of 2006.

²⁶ Newham Recorder 2 February 2006, 'Fish Island Celebrates'

These adjustments were projected to save about \$363 million.²⁷ There appears to be compelling evidence that the research and preparation of bids tends to underestimate the cost side of the operational budgets required to deliver the event. A brief glance at the construction schedule for London 2012 suggests that there are significant challenges ahead. Over the six year construction period it is estimated that 37,500 construction jobs will be created – 24,000 engineers and trades staff, 6,500 managerial staff and 2,800 professionals including architects and surveyors. At the project's peak about 8,000 people are anticipated to be working on the Olympic site, just under 3 per cent of the total number of people working in the industry in Greater London.²⁸ The new build consists of approximately forty percent of the venues required to host the Games; though a proportion of this is earmarked as legacy investment, including the Olympic village which will sleep 17,000 Olympic competitors before being returned for use as a public/private sector property development worth around £600 million.

Whilst the ghosts of Montreal (1976) with its cost overrun of \$1.2 billion being met by taxpayers over subsequent decades and Athens (estimated cost overrun of 0.5 \$ billion) haunts the London 2012 organisers, there is some evidence that Londoners and people in other UK cities are prepared to support the Games through taxation. A study published in January 2006 indicated that UK taxpayers were willing to pay a total sum amounting to around £2 billion for London to host the 2012 games. For London residents a proportion of this sum will be derived from the Mayor's precept on council tax bills.²⁹ This base of popular support for the 2012 Games provides its organisers with a positive starting point for managing the interface between LOCOG and the various agencies responsible for delivering the event and its legacy and the various interests groups, or stakeholders, who seek to benefit from the significant investment required to host the Games. A broadly supportive public opinion, however, carries with it expectations, not all of which can be fulfilled. The management of expectation is a critical task for those responsible for the Games and its legacy. The challenges are considerable given the wider non-sports related regeneration agenda. Below some of the major issues and challenges are outlined in terms of the pre- and post-event phases.

Delivery, Deadlines and (avoiding) Debt

In November 2005 David Higgins became Chief Executive of the Olympic Delivery Authority. He performed a similar role for the Sydney 2000 Games. His immediate task was to realign the delivery strategy to contain costs. He began to do this by setting aside an existing 'informal' shortlist of contenders involved in the procurement contest for the contract to manage the construction and delivery of the Olympic site at Stratford and the other venues dotted around the UK. When the formal process of tendering was initiated in

²⁷ Business Beijing 26 August 2004 Cousins S 'Beijing Cuts Costs'

²⁸ Daily Telegraph 19 January 2006, 'Building on harmony for a capital show'

²⁹ Atkinson g., S.Mourato and S.Szymanski (2006) 'Are we willing to pay enough to back the bid?' London: London School of Economics and Political Science. Mimeo.

February 2006, the contract framework favoured the creation of consortia that came from big business, companies that had a strong track record in delivering large infrastructure projects.³⁰ Parallel to this process, the revision of the Olympic Village design at Stratford took place, reducing the requirement to relocate local small enterprises and re-positioning the Media and Aquatics Centres within the security zone of the village itself and in close proximity to the new Stratford City development.³¹ These steps represent the initial phase of realigning plans to fit a delivery budget of approximately £1.7 billion. The containment of cost will be a continuing theme that will undoubtedly attract considerable and on-going government, media and public attention. A key element in the containment of cost is the balance between the construction of temporary and permanent facilities. The event itself lasts for around 1% of the total time required for its preparation. The scaling down and re-purposing of facilities for subsequent and manageable legacy use often means reconciling creative and ambitious architectural designs with the necessity to remove or convert buildings after the event is over.

A second major challenge arises from the Olympic-related employment opportunities in construction. Here there is likely to be a temporary effect that does not amount to a transformation of the labour market in east London or the city as a whole. Construction contracts will be awarded through competitive tender, with project completion being highly time-sensitive. The proportion of employment opportunities going to local workers is affected by the capacity to match local skills profiles with the specialist requirements of the construction industry over the period 2008-2012, with 2010 being a peak point in the demand for labour. There is relatively little lead-in time for overcoming any mismatch between the skill requirements of construction companies and the existing skills profile of the resident East London workforce. In January 2006, the London Development Agency commissioned a major skills study for the London 2012 Games. The study was designed to identify the range of skills needs, drawing upon best practice experience from previous Olympic host cities. LDA financial support for training was fixed at £9 million and this has been supplemented by other training grants, such as the European Social Fund (ESF) grant of £6.2 million awarded to the East of England Development Agency to support the introduction of training programmes for local people. In addressing the skills requirements of the construction industry such reports and training programmes will face several structural labour market issues such as the mobility of labour between major construction sites – the completion of Terminal Five at Heathrow may induce a migration of skilled labour to East London and the migration of skilled labour from other EU states where the construction industry may be less buoyant.

³⁰ The emphasis in the tender documentation shifted from applying financial penalties for failures to deliver projects on time to rewarding the delivery partner for the effective risk management of the whole construction project. See Boles T. (2006) 'Amec and Balfour Beatty team up for Olympic Gold', Sunday Times, February 19, 2006.

³¹ See: Office of Deputy Prime Minister (2006) Olympic Delivery Authority (Planning functions) Order 2006. London: ODPM Consultation Paper and European Communities – Services – Competitive dialogues (2006) UK-London: Construction project management services 2006/S 33-036394 Contract Notice <http://ted.publications.eu.int/official>.

The 'ready' availability of this mobile labour will have to be balanced alongside the provision of employment opportunities for the local workforce.

Third, aside from the construction sector, the Olympics provides a further, diverse range of temporary employment opportunities in sport and exercise, transport, media, health, education, cultural industries and in leisure, tourism, hotels, food and catering. These sectors have diverse structures ranging from the relatively integrated and large scale – health and education sectors – to those dominated by small businesses and sole traders – restaurants, food outlets etc. Establishing an effective framework for the development of training and education opportunities for local residents is a significant task and one that is not served well by the current diversity of agencies with responsibilities for education and training in east London and the city as a whole.³² Equally, what constitutes an East London labour market is a complex affair with the inner London boroughs containing variations in economic activity/inactivity and skills profile. Those boroughs in closest proximity to the Olympic development site – Hackney, Newham and Tower Hamlets – have higher proportions of the workforce with no qualifications than the London-wide and national averages and the characteristics of current employment and occupational patterns have strong ethnic and gender dimensions. The potential for the polarisation of temporary employment opportunities arising from the Olympic Games to be divided with local people undertaking low skill jobs and specialist and higher skilled labour being recruited from outside the region is considerable. The avoidance of this scenario depends upon the urgent development of training opportunities, particularly but not exclusively focused upon the training and up-skilling of those with few or no qualifications.

Finally, the pre-event phase while dominated by delivery and deadline issues – revenue/cost, supply-side, supply chain effects – also presents opportunities in stimulating demand and generating intangible benefits. The demand side relates to pre-event visitors and pre-event tourism; while the intangible benefits arise from, for example, the increased focus upon culture, leisure parks and spaces and creative activities, education, health, volunteering and community engagement/development. Pre-event visitors to previous Olympic venues in Barcelona and Atlanta numbered around 20,000; it is likely that the numbers of visitors to London will exceed this. Pre-event tourism also rose in host cities with, for example, hotel bed occupancy rates rising in all recent host cities.³³ In terms of intangible benefits, the Olympics tend to catalyze local action to improve public parks and open spaces and generate cultural and leisure events.

2012 and the Thames Gateway

The Thames Gateway development, its associated regeneration and planning infrastructure and the 2012 Games create a complex web or network of agencies and plans for urban regeneration and social renewal. Integrating the agencies and local and regional plans is a difficult affair. There are areas of

³² See the Learning and Skills Council (LSC) (2005) London East: Olympic Skills Dialogues Draft paper September 2005.

³³ Equally, it is important to recognise the displacement or crowding-out effect that arises from this.

contestation over planning authority, housing policy, employment and infrastructure development. Where one agency's authority begins and another's end is often unclear, with boundaries being blurred.³⁴ In this respect, London's Olympic venues are being constructed in an urban context that is already experiencing an extensive process of renewal but this process is taking place in a far more socially and organisationally complex setting than was Sydney or Barcelona. Thames Gateway, London and local borough planning documents are a mix of the aspirational and real. Often a planning authority, such as a local borough, cannot alone deliver the intended outcomes since development opportunities typically require a mix of private/public partnerships to fund infrastructure and the construction of housing, retail, business and leisure facilities. The Thames Gateway, therefore, may be perceived as a patchwork of speculative developments rather than as a well specified and integrated plan for urban renewal. The impact of the Olympics in this wider context has several dimensions.

A significant proportion of infrastructure spending in London was planned irrespective of the success of the 2012 bid. The primary effect of hosting the event is to place time constraints and pressures upon existing plans; in some cases bringing forward completion dates. Infrastructure developments that are Olympic-specific but are also included in the legacy – especially sports facilities, media and aquatic centres – pose two related issues. First, their construction has to facilitate post-event usage that is sustainable and, second, they should attract, in combination with infrastructure development, an inducement for further long term private capital investment in the East London area thus guaranteeing a longer term beneficial legacy in relation to jobs and the inward movement of new companies and industries. Conversely, such 'success' may be to the detriment of the Thames Gateway development overall. The Olympics and its 'satellite' economy is likely to suck in investment that may have otherwise taken place in other locations along the Thames Gateway – this is often referred to as the displacement effect.

The displacement effect may be mitigated by inward investment that provides a long term platform for the growth in employment that rests upon the attraction of new industries and the relocation large scale companies. It is here that the Thames Gateway confronts a significant barrier to its long term development. It is beyond the scope of this paper to address this question in detail. However, it is possible to raise some salient issues by reference to Barcelona and Beijing. Barcelona's long term economic development rested upon the Olympic Games providing a catalyst for urban development in a wider regional and European context. Barcelona shifted in time toward being a centre for the expanding EU service sectors for whom the city offered a location that connected northern Europe with the Iberian peninsula (Brunet:1995). Barcelona attracted considerable foreign investment to facilitate its long term development. Beijing, likewise, is the shop window for a relatively dynamic national economy, with the Olympics providing a significant opportunity to attract inward investment and 'know-how' to expand the higher

³⁴ Examples include the interface between the Olympic Delivery Authority (ODA) and local authorities over planning permission and the ODA's relationship with Transport for London in relation to developing the transport infrastructure around and in the Olympic village site.

value added, high technology, sectors through partnerships and alliances with western multinational companies.

By contrast, the UK does not currently benefit from the locational and (industrial sector) transitional opportunities afforded Barcelona or from the domestic dynamic of a Chinese economy that has experienced record growth rates over recent years. Indeed, as recent reports have shown, UK investment as a proportion of GDP has fallen to historically low levels with major investment projects being mainly state-sponsored in areas like health and the use of IT in public services.³⁵ In this broad economic context, the catalytic effect of the Olympics is likely to be muted given the relative calm in which the wider economy is mired. The role of the cultural and creative industries in generating employment in East London and along the Thames Gateway has some foundation but this sector cannot alone provide the drive toward the generation of a new and dynamic regional economy.³⁶ The prospect for the Thames Gateway in such a scenario, is that job creation remains close to the capital and spreads slowly eastwards from the city whilst housing development along the Thames estuary creates populations that are required to travel into the capital to work. The mismatch of housing location and the job market merely generates a rise in commuter traffic into London, placing further pressures on the currently fragile though improving transport infrastructure.³⁷

Finally, we turn to housing and related social questions. The Olympics regeneration programme increases the housing stock by 9,000 units – 4,500 affordable houses and 4,500 others to be sold on the open market. For the three London boroughs in closest proximity to the Olympic village – Tower Hamlets, Hackney and Newham – the affordable housing provided by the Olympics will represent 6.6% of all local authority stock. In turn, the Thames Gateway development as a whole will facilitate the construction of a total of 33,000 new houses in the three boroughs in the period 2007-2012, with the Olympic-related construction providing 27% of the total stock.³⁸ The Olympic effect will be felt in two further ways. First, through the important environmental improvements – open spaces, parks etc – replacing largely brownfield sites and, second, through the overall improvement in existing housing stock, social amenities, retail and public facilities that such a development entails – particularly around the Stratford City project.

These overall improvements in housing and social infrastructure change the dynamics of the relative value of living in a particular area. The relative value of living in East London is measured by comparing the area to the London average. In Newham, for example, in 2006 the borough had average house prices below the London average and a higher proportion of 'unfit' stock compared to the London-wide average. The Olympic effect may be to

³⁵ As a result, the UK economy is relatively stable and undynamic, with as Schumpeter might argue little creativity and even less destruction. See Martin B and Rowthorne B (2004) 'Will stability last' London: UBS Research Paper March 2004

³⁶ See London Cultural Capital (2003) London: Mayor of London.

³⁷ Such a scenario is raised by the debates concerning 'sustainable communities'.

³⁸ GLA (2004) London Thames Gateway Development Framework, April 2004.

significantly improve existing stock and change the dynamics of the quality of housing, especially around the Stratford town centre. It is here that a 'Barcelona effect' may occur. Barcelona witnessed a significant rise in the market value of housing within the City leading up to and following the 1992 Games as did the Homebush area of Sydney – a rise of 20% in the period 1995-2000.³⁹ While the rise in available housing stock will be very important, the housing development will also raise important challenges to ensure that 'fringe' localities (such as Hackney Wick) are not ignored and that communities are not divided between the 'gated' and those without, or splintered along 'new' lines of class, race or ethnicity.

Conclusion

Evaluating the Olympic legacy is a complex matter; distinguishing between the event-related effects and the longer term legacy requires rigorous methodologies and an openness about underlying assumptions and methods of measurement. Many studies hitherto have over-stated positive impacts in supporting bids and many others have adopted less than rigorous, micro-economic approaches usually so that their authors provide clients with the answers they wish to hear. Indeed, the cost/benefit approach often favoured by economic impact analysts contains implicit assumptions that do not easily rest with an overall evaluation of a mega-event such as the Olympic Games. In business, cost/benefit analysis is based primarily upon reflecting the interests of shareholders, the owners of the enterprise. In contrast, an Olympic event and its legacy has a less well-defined and homogenous 'self-interested' group, it has multiple stakeholders, many of whom have competing socio-economic aspirations and values.

The first part of this paper explained some pitfalls and problems in evaluating effects whilst also drawing upon existing evidence from more rigorous sources to draw out, hopefully, constructive insights into the experience of cities that have recently hosted the games. Barcelona provided an example of the first post cold war 'post-ideological' games; a games that offered an alternative ethos to the highly commercialised, business-oriented model offered by US cities. London's bid also struck a cord with the IOC and its own national and London government, and served to further legitimise the role of the state and quasi-state agencies in urban regeneration, creating some distance from the prevailing 'neo-liberal' model of the shrinking state so popular in the 1980s and 1990s.

Comparisons between cities that have or will host the Olympic Games must carry many caveats. Despite being home to several Chinese restaurants, the Bow Road is not a mini version of Beijing. The catalytic effect of the Games varies according to local, regional and national economic circumstances and the Olympic effect has to be measured over a significant period of time. The London 2012 Olympics is attempting, like Barcelona and Beijing, a significant investment in infrastructure designed to support programmes of urban

³⁹ See Donovan P. (2006) East London's economy and the Olympics, London: Global Economic Perspectives pp 12-3

renewal or economic regeneration. Arguably, unlike Beijing in particular, the domestic economy is less dynamic and the catalytic effect potentially less lasting without a significant impetus given to new capital investment, especially commercial or private sector investment, in the Thames Gateway to provide not only houses but new industries and employment opportunities.

Such investment would potentially offset the likely Olympics displacement effect – the concentration of funding for 2012 in East London rather than other locations on the Thames Gateway . It would also assist in overcoming the potential mismatch between the expansion of house building, the creation of employment opportunities and the development of the transport infrastructure within the Thames Gateway region. Equally, the success of the longer term legacy demands a careful balance to be struck between event-related construction and the longer term use of sites within the Olympic village, sites that must be 'fit for purpose' and socially and economically viable post-2012.

In the immediate future, the 2012 organisers have a significant challenge in curbing costs and meeting completion dates while also managing local expectations about the perceived benefits and costs of hosting the Games particularly in relation to employment,. Despite these daunting tasks, the success of the Olympic bid has placed East London in the global public eye. 2012 provides an opportunity, what might be called a new public space, for addressing urban development issues and for the historic imbalance in London's socio-economic development - between the 'rich' west and 'poor' east - to be seriously debated and addressed for the first time in fifty years.

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Biography

Gavin Poynter is Professor and Head, School of Social Sciences, Media and Cultural Studies at the University of East London. He is a member of London East Research Institute (LERI) and has published widely on work, employment, the economy and social change. With colleagues in LERI, he is currently working on a book on London 2012 and the Thames Gateway.

