London's global neighbourhood – the future of the West End

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London's global neighbourhood – the future of the West End

Edited by Ben Rogers, Kat Hanna
and Rachel Holdsworth

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Foreword, Sadiq Khan

London's West End is part of our city's global identity – a draw for tourists, a shopper's paradise, a culture seeker's dream, a foodie heaven, and a home to many thousands of Londoners.

Nowhere better demonstrates the message that I have been spreading around the world – London is open. There can be few neighbourhoods in any other global city which are more diverse economically, socially and culturally.

We should be grateful for the chain of historical decisions and coincidences that have left us with a central London district where you can see so many aspects of what London has to offer within a ten minute walk.

This is what makes the West End so important to London and indeed the UK – as a driver of economic growth and as a cultural hub. But the West End is also beset by challenges, in many cases the products of its own prosperity.

Without places to live and work which are affordable, we risk forcing out the businesses – and residents – that give places like Soho their unique characters.

And while the hustle and bustle is all part of the charm, it can sometimes become too much. We can't – and as Mayor I won't – allow Oxford Street to remain among the most polluted roads in Europe. Nor can we allow the wonderful independent cafes, restaurants, pubs, bars, and cultural centres to be priced out. And we must support the West End's world-famous retail offering too – from the high-end luxury boutiques and vast palaces of fashion and design, to the vintage shops and long-established specialist outlets. We must meet the challenge of planning for liveable, breathable, usable space for all Londoners, in areas that were never planned to accommodate commerce or transit on the scale necessary today, with bold and innovative solutions which protect the West End's character, its businesses, and its residents.

I welcome this collection of essays, which is a valuable contribution to the exchange of ideas necessary to make the most of the West End's bright future.

Foreword, Baroness Couttie

London's West End is one of the most celebrated and exciting places on the planet. It is an economic powerhouse, a mixture of diverse urban neighbourhoods, a focus for culture and entertainment, a world class centre of learning and research, as well as being the country's leading retail destination.

This special place is the most dynamic and diverse city centre in the world, with a huge capacity to rapidly generate economic growth and jobs for the benefit of the UK as a whole. The West End is not only the driver of London's success, but is also home to long-established and new communities, bringing family and neighbourhood life to the heart of London.

But the West End faces both challenges and opportunities to grow in ways that enhance the experience of those who live, work and visit the area. In the face of fierce international competition, the area's success cannot be taken for granted. Through careful stewardship and investment, where public bodies are working collaboratively with private partners as never before, plans are underway to encourage investment and jobs, and to create the new work places needed to accommodate them. In tandem with this, there are also plans to deliver transformative improvements to the public realm and capture the benefits of game-changing new transport links that will help to reduce traffic and improve air quality.

The West End is a great place to live and work, but we must ensure that it continues to be as good as any international location; that the distinctive feel of the area's urban villages is enhanced; that large, medium and small businesses thrive; and that the visitor experience is the best it possibly can be.

That's why, whilst it is important to celebrate the heritage and special character of the West End, we can also look forward with confidence that it will remain as the beating heart of the economic and cultural life of the UK. This unique character has been captured well in these essays, setting out why the place and its people have combined to create an extraordinary environment, which has no global comparison.

Introduction and overview, Ben Rogers

Many of the contributors to this collection help us see what makes the West End special. There are a number of crucial ingredients.

First, there is the built environment, laid out in the late 17th, 18th and early-19th centuries and still largely intact today. The West End has no firm boundaries – as Tony Travers puts it in his paper: "My West End is different from yours."

But, however we define it, the area stretching roughly from St James's Park in the south to Euston Road in the north – and from Tottenham Court Road (or perhaps Kingsway) in the east to Edgware Road in the west – has a distinct build character. It is surrounded by large parks (Hyde Park, Green Park, St James's), includes some important boulevards (Oxford Street, Regent Street, Piccadilly and Charing Cross-Tottenham Court Road), and features world-famous public spaces (Trafalgar Square, Leicester Square and Piccadilly Circus).

Nevertheless, the West End is a generally a place of streets, garden squares, alleys and yards. Some of the individual estates that make up the area, like the Grosvenor Estate in Mayfair, are laid out relatively formally. But there is no overall plan. The irregular urban grain, the variety of architectural styles, and the preponderance of low- and mid-height development all ensure that the overall effect is one of individuality and sociability rather than grandeur.

A second vital ingredient is the extraordinary mix of activities that the West End contains. The 18th century West End was predominantly a wealthy residential development, and tens of thousands of people continue to live there today. Then, during the 19th century, the West End developed as an important business, entertainment and cultural district. Today, as Lucy Musgrave and Alex Arestis write, a typical West End block might contain houses and flats, shops, a theatre, an historic church, a couple of galleries and restaurants, a club, a hairdresser, a tailor, and offices containing an array of small and medium-sized businesses ranging across financial services, fashion, advertising, film, fine arts, food and philanthropy.

The result is a place that has the look and feel of a great, human-scale neighbourhood. Or perhaps a collection of neighbourhoods: the West

End, though relatively small, is made up of a number of districts – Mayfair, Soho, Covent Garden, Fitzrovia, Marylebone – each with its own distinct urban grain, mix of activities and character.

But the West End is, of course, an unusual sort of neighbourhood. The jewel in the crown of a great world city, its vitality and humanity attract residents, visitors, businesses and investors from across Britain and around the globe. The West End generates 3 per cent of the UK's economic output – more than any other comparable part of the UK, the City of London included – and £17bn of taxes per annum, including 8 per cent of all business rates. 610,000 people work there – roughly 10 per cent of London's workforce. Most tourists who come to London visit the West End, and therefore the area plays an outsized role in the way foreigners experience and think about London – part of its 'soft power'.

The West End's very success brings endless change and huge issues. The papers collected here explore some of the challenges facing the district, and set out ideas on how to address these and help the West End prosper.

As is generally the case with cities, the challenges facing the West End are intricately wound together: But they fall under four broad headings.

Capacity

As many of our contributors point out, the West End is bursting. London is going through a growth spurt, with its resident, worker and visitor populations at an all-time high. This is putting particular pressure on the West End. Crossrail, when it opens in 2018, will tip out an estimated 120,000 commuters and visitors every day – a 40 per cent increase on today's levels. Craig McWilliam writes that Westminster council is planning for 77,000 new jobs by 2036, requiring around 2 million square metres of extra employment space.

Nonetheless, the West End has been slow to cater to growing demand. Housing and workspace provision has not increased at anything like the rate of demand. As Alex Jan points out, the number of commuters travelling into the West End has remained constant, despite huge increases in London's economy and population. The result is that the price of living and doing business in the West End has gone up

dramatically, squeezing small businesses and low- and middle-income residents out of the area and undermining its social and economic ecology.

The West End needs more homes and workspaces. But, as Sandra Jones and Rob Harris argue, getting the balance right will always be a challenge. The post-war years saw the number of people living in the West End decline, as businesses took over many former homes and built new workspaces. Over recent years that trend has reversed. Houses once converted into offices have been reconverted into houses, and former office developments have been turned into flats – Centre Point being a particularly visible example.

Sandra Jones and Rob Harris point to the need to preserve affordable workspace in the West End and suggest a number of ways that this could be achieved. These include protecting existing workspace from conversion to homes, and obliging developers of large commercial projects to provide a proportion of affordable work units – just as residential developers are obliged to provide affordable housing. And they suggest that the planning system recognise the erosion of old distinctions between office work and manufacturing by establishing a new, more flexible category of 'knowledge workspace'.

Another way of meeting the demands on the West End will be to extend the times at which it is open for business. At the moment, for instance, Oxford Street, Regents Street and Bond Street – perhaps the world's most famous shopping district – close at dusk. The introduction of a 24-hour Tube will help boost the West End's night-time economy, but this brings its own challenges and is likely to be resented by residents unless it is carefully managed.

The West End's transport system faces similar pressures to those of its buildings. Congestion and pollution have worsened over the last few decades, despite the introduction of the Congestion Charge. Oxford Street in particular ranks as one of the most polluted roads in Europe, as well as an accident hotspot.

Although there is at least some opportunity to densify the West End and build new homes and workspaces, there is very little opportunity to build more transport capacity – at least at surface level. Instead, we need to make better use of existing routes.

Soho land use

- Retail: independent/specialist
- Retail: high street
- Café/takeaway
- Restaurants
- Pub/bar/nightclub
- Private members club
- Commercial (offices/studios)
- Sex industry/strip clubs
- Gallery
- Theatre/Cinema
- Health (practices/pharmacies)
- Community/recreation/education
- Residential
- Hostel/hotel
- Religious use
- Other
- Unused/construction site

Detailed study mapping ground floor land use of Soho area. Soho public realm study, Westminster City Council and Transport for London, 2014. Image reproduced with thanks to Publica.

As all London politicians know, transport is a sensitive issue and drivers have strong views about their right to own a car and drive it where they wish. In recent years, the introduction and extension of the Congestion Charge, increased parking charges and other moves to relieve the pressure on the West End's crowded roads were all met with fierce opposition.

Nevertheless, current trends are simply unsustainable. We need to find ways of reducing the amount of space given over to parking in the West End rationalising deliveries, including through measures to encourage freight consolidation and night-time deliveries; and promoting more walking and cycling. The New West End Company has called for Vehicle Free Zones and other measures to cut traffic.

As Alex Jan suggests, there are also good arguments for looking at ways of reducing the number of buses running through the area. With space in such short supply, we can't afford to have empty (or even half-empty) buses clogging up the West End's streets.

Character

This is a broad and particularly difficult agenda. To begin with, it will be important to find ways of preserving the West End's social mix – particularly income mix. It's often said that one of the things that gives London its character is the way in which wealthy and poorer Londoners live close together. And even today, around a quarter of Westminster's homes are 'affordable' sub-market.

However, the proportion is set to decline, as affordable housing providers are forced to sell their stock to tenants or pay for new homes in cheaper areas. In the meantime the area has become completely unaffordable to people on modest or average incomes. If the West End is to remain a genuinely mixed community, there needs to be an emphasis on protecting and providing both low-income and intermediate 'workforce' housing – especially for those with strong connections to the area.

It will be equally vital to ensure the preservation of the West End's commercial variety. Of course, the profile of businesses operating in the West End is always evolving. Today there is less manufacturing or clerical activity, and many more restaurants, bars and clubs. As Eva

Pascoe explains, the internet is also transforming the West End's large and important retail sector. With more and more of us shopping online – especially for everyday goods – Oxford Street, Regent Street and the West End's shops will have to 'up their game' and offer a better quality of 'retail experience'. Shops will need to be well designed; merchandise must be more alluring and better displayed; and service must be more professional.

The challenge for the West End is not change *per se*, but the process whereby rising prices squeeze out small- and medium-sized enterprises that are vital to both the area's character and its long-term success. A West End dominated by large chains and other corporates would quickly lose its vitality and attractiveness. The contributors to this collection offer various ways of making the West End more affordable for SMEs, including the increased provision of small work and retail spaces, and greater use of markets, pop-ups and 'meanwhile' spaces.

Another element of the character challenge lies in ensuring that the new development and increased densities the West End requires are of a high quality, and in keeping with each area's form and grain. Brian Girard's essay set out an architect's thinking on how this can be done. He stresses the importance of keeping towers out of the West End and argues for sensitive development that balances intensity with human scale.

Finally, there is a need to improve the quality of the district's public realm. Back in 2004, the famous Danish urbanist Jan Gehl published a study of central London that was highly critical of how vehicles had been allowed to dominate the area and the interests of pedestrians had been neglected.

Some progress has been achieved since then, with investment in improved traffic calming, pavements and wayfinding, among other measures. Trafalgar Square has been partly pedestrianised, the barricades have been taken down at Oxford Circus, and pavements widened in Piccadilly, to take just a few examples. There are plans to get rid of large one-way systems, like the one running around Tottenham Court Road and Gower Street. The Mayor is committed to pedestrianising Oxford Street – though full pedestrianisation, Alex Jan and Peter Murray both suggest, is likely to pose as many problems as it solves.

In any case, there is much more to do. Lucy Musgrave and Alex Arestis set out some guiding principles. They emphasise, in particular, the opportunity to reveal the underlying urban grain of the West End, reconnect important spaces and invest in more minor, pedestrian-friendly streets. Peter Murray writes on the West End's boulevards, reminding us just how much more could be done to humanise them. He makes a strong case for the redesign of Park Lane, by getting rid of the central isle, creating a large walkable boulevard running down Park Lane's east side, and improving pedestrian links with Hyde Park.

Funding

If the West End is to meet the challenges set out above and build on its success it needs investment – including, inevitably, public investment. New transport infrastructure, improved public realm, cleaner public transport, more affordable housing/workspace and better management of public space don't come free. As Rick Muir sets out, the West End poses peculiar policing and security challenges. As pressure on the area grows, and with the threat of Paris-style terrorist attacks a very real one, the cost of preventing crime, maintaining order and protecting the public will also increase. It's vital that we find ways to cover it. All in all, West End leaders, as Craig McWilliam writes, have identified the need for £1bn of new investment over the next 15 years. Half of that investment is unfunded.

As Alexandra Jones sets out, securing the investment the West End requires will be extremely hard under London's current tax regime. Barely 7 per cent of all the tax paid by London residents and businesses is kept by the Mayor and boroughs. In New York the equivalent figure is over 50 per cent. As a result the GLA and London's boroughs, including West End ones, have few financial incentives or flexibilities to finance and fund projects to boost economic growth.

Government policy of devolving all business rates (not just 50 per cent) to local authorities could help in securing public investment into the West End, and might provide London with the opportunity to develop a more flexible, better-designed commercial property tax regime. But as yet we know very little about the details of the new policy. As already mentioned, 8 per cent of all business rates are raised in the West End,

and the area can't expect to keep this to itself – some will have to be distributed to other parts of London. At the same time, it's important that the new regime recognises the special role the West End plays in London's economy and identity, and that it enables the additional investment that the West End badly needs.

Governance

The West End has a remarkably complex, multi-layered system of governance. While most of the West End falls within the boundaries of the Borough of Westminster, some also falls under Camden. London's boroughs have much more power – especially over planning – than their equivalents in other comparable world cities, ensuring that local residents have a great deal of say in decision-making.

This has helped preserve much of what is best in the area. As Tony Travers reminds us, there were many people back in the 1950s arguing that the whole of central London should be governed by a single council, or that planning powers for the area should be transferred to the Greater London Council – outcomes that would surely have resulted in more towers, blocks and roads, and a less human West End. Piccadilly Circus and Covent Garden would almost certainly have been demolished and redeveloped.

Yet the boroughs are by no means the only influential players in shaping the West End. The West End's large landholders or great estates – like Grosvenor in Mayfair, the Crown Estate in Regent Street, the Howard de Walden estate in Marylebone and Capco in Covent Garden – have come to play a very active role in shaping and improving the area. Business Improvement Districts (BIDs), imported from the US only a decade or so ago, have been a great success: they have given local businesses a voice in local affairs and created a new source of investment for local improvements.

The area also has an active civil society. As Lucy Musgrave and Alex Arestis point out, local resident and conservation groups have acted as a brake on poor, unsympathetic development – the opposition to the demolition of the historic Covent Garden market was citizen-led.

Over and above the boroughs, the Greater London Authority takes a strategic interest in the area, setting the broad planning framework,

funding and controlling the major roads, public transport and policing, and contributing towards affordable housing (among other functions). As we have seen, central government controls the purse strings and has the last word on planning in cases where major developments are 'appealed' to the Secretary of State.

In 2013 the West End Partnership was established in an attempt to draw together the West End's many stakeholders and establish a more focused and coordinated approach to governing the area. As Craig McWilliam writes, the Partnership has helped establish a shared long-term vision for growth and make the case for growth to local residents. Time will tell whether The West End Partnership works, or whether something more muscular is needed to overcome the problems arising from having such a layered, patchwork system of control. John Dickie suggests that the prevailing arrangements are, as Churchill said of democracy, the least worst form of governance for the area. But Tony Travers hints that the "occasional use of Mayoral Development Corporation powers (or similar short-term interventions)" might be needed "to address the periodic need for change within the West End".

In their essay, Lucy Musgrave and Alex Arestis quote Virginia Woolf's description of the West End as the "golden tassel on London's vast black coat".

That was a century ago, but the West End remains a special, uniquely attractive and extraordinarily productive place. Both London and the UK are better off for it.

It is clear from these essays that the West End is struggling to keep up with the demand on it – a pressure that will only intensify as London's population grows, tourist numbers increase and the government continues to cut back on public spending. The UK vote to leave the EU has redoubled demands on the UK economy. We can't afford to let the West End just 'get by'. It needs to flourish.

Keeping London's heart aglow – transport

Alex Jan

Public transport remains key to the success of the West End. It forms an important factor in understanding its historical development and addressing the challenges and opportunities the district faces. There are some major new projects in the pipeline for the area: if they are handled intelligently, they can help the West End to continue to grow and prosper at scale.

The challenges, thrills and spills of using different means for getting around the West End shape our perceptions and understanding of the area. In addition to millions of journeys on foot (and increasingly by bicycle), demand for movement manifests itself in the form of heaving traffic, packed Tube trains and stations, and panting buses. Moving around the district – day or night – connects the individual with the pulse and vibrancy of the West End.

These are in turn reflections of demand for the labour, commerce, glamour, shopping, eating, entertainment and spectacle on offer. There are but a few world cities where one can experience such a concentration of so many activities – fuelled by a pattern of services and infrastructure that have, in many cases, changed little over decades.

A manure crisis to the emerging Tube

Popular historical images of the West End and London transport are closely intertwined. They remind us of the economic vitality and interdependence of the West End and the rest of London. "The Way Home Underground Always Keeps London's Heart Aglow", boasts one lithograph from 1925 by Charles Herrick, with its enticing images of Theatreland and other West End icons. Some 90 years later, the remarkable economic rise of east London, the continuing desire to attract

tourism and talent both from within the UK and internationally, and the pressing need to improve air quality are spurring today's custodians of the West End to tackle its transport problems. To do so will be hugely important in the aftermath of the shock referendum decision of the United Kingdom to leave the European Union.

The boroughs, the Mayor and Transport for London, along with the Great Estates and Business Improvement Districts, are alive to the need for a renewed sense of urgency in transport. Combined with the advent of Crossrail, the next five to 10 years should see many of their plans coming to fruition. Unsurprisingly, there has been debate and controversy surrounding transport in the West End for the large part of two centuries. The horse-drawn omnibuses of the 1800s, competing for custom down crowded thoroughfares such as Oxford Street, created their own air quality challenge. In the 1890s, the Times predicted a Great Horse Manure Crisis caused by the sheer volume of horse-drawn traffic.

With the advent of motorised buses and the Underground railway, this problem finally disappeared. But the advent of the Tube itself was not without controversy. Bus companies were wary of losing their trade, and campaigned against the construction of the central London electric railway, which today we take for granted. In fact, the West End was a late direct beneficiary of the Tube. Early lines such as the Metropolitan Railway and Metropolitan District railway skirted the area. It would be some 30 to 40 years before the precursors to today's Northern and Central lines opened. The latter would turn into a 34-mile long ribbon connecting west London suburbia to the working-class and industrial neighbourhoods of east London (and beyond) via Marble Arch, Bond Street, Oxford Street and Tottenham Court Road.

Trams and trains were never quite allowed to venture into the heart of the West End. Stopping mainline trains at the outskirts of central London is perhaps a long-standing factor in the case for Crossrail; it negates the need for millions of interchanges at London termini.

As London's centre has looked for places to grow, derelict railway lands around these termini – such as Liverpool Street, King's Cross and Paddington – have provided the space for the inner core of London to expand, reinforcing the economic 'centre of gravity' of the city and in turn its dependency on the railway.

Transport's relationship to jobs and growth

Over many decades, the West End has benefited from more public transport investment than perhaps any other part of the country. This reflects its importance as a major centre of employment and economic activity.

Much growth has been experienced on London's rail, Tube and bus system.[1] The Underground network as a whole has gone from carrying a conservatively estimated 277 million passengers per annum in the 1920s[2] (albeit on a considerably smaller network) to between four and five times that number today.[3] And central London Tube commuter numbers have seen rising demand. Morning peak demand on the Underground is between 30–40 per cent greater than it was in 1964.[4]

But this growth on the Tube conceals a remarkable fact. If we compare the total number of people travelling into central London during the morning peak hours – the time at which the system is busiest and most stretched – demand has increased only modestly. For all public transport in 1964, some 1.04 million took part in the weekday morning rush into the centre of town; in 2014 it was barely changed at 1.15 million.[5] And the latter figure includes the DLR and the effect of an expanded/upgraded Tube network – such as the additions of the Victoria and Jubilee lines.

If we add in private transport modes, a similar pattern emerges. In 1969 (the first year for which combined data are available) demand was 1.18 million for the 7–10am peak. The corresponding number for 2014 was 1.26 million – just 7 per cent greater.[6] This modest growth is reflective of the limited historical change in employment numbers that has taken place in the West End. Census data shows that in the borough of Westminster (where the largest part of the West End lies), employment grew by 3.5 per cent between 1961 and 2011 (the latest census year).[7] This compares with an average of 14.4 per cent for London as a whole over the same period.[8]

However, the economic growth that has been experienced in the West End/Westminster paints a contrasting picture. For example, in the period from 1997 to 2014, Westminster's gross value added (GVA) increased by 155 per cent to nearly £49bn[9] – a faster rate than for the rest of London (142 per cent) or the rest of the UK (103 per cent) over the same period.

This historical difference in the growth of employment and economic output raises important questions about how future public transport capacity – particularly Crossrail (and Crossrail 2) – can best be harnessed. Crossrail 1 will add as much as 10 per cent to central London's rail capacity. But if there was only a limited increase in employment capacity, the risk is that the activities that make the West End attractive in its broadest sense would be priced out by ever-increasing rents and real estate values. Alternatively, sustainable increases in the supply of space for employment in the core West End (and at its periphery) could help to secure the West End's unique economic 'ecosystem' by providing space for a broader range of uses and businesses of all shapes and sizes. Coupled to a devolved business rate regime, growth could also help to fund important council investment. The West End Partnership Board is developing ideas and proposals in this sphere.

Future developments

Alongside Crossrail, there are other important transport projects and developments that will have a lasting impact on the West End. Crossrail 2 will lead to further dramatic change in the West End's economic geography. It is intended that it should be paid for largely from London's pocket, in the form of land value capture and localised taxes. There will be lasting implications for the sorts of property construction required to help pay for such schemes, and the sort of development London wants to see built.

Plans are also afoot for another attempt at resolving the traffic challenges of Oxford Street. The new Mayor is committed to some form of pedestrianisation,[10] 43 years after the last attempt was made to tackle the street's traffic problems.[11] Developing and implementing proposals that balance various groups' needs will be no easy task. But the fact that there is consensus on the need to do something is in itself progress.

Oxford Street, along with Camden's West End project (which will remove one-way systems on some of its main thoroughfares such as Tottenham Court Road and Gower Street), paradoxically provide the opportunity to think more radically about suburban bus services and the impact they have when they converge on the West End. London could perhaps think about a network more akin to its heavy rail system, where services converge on a number of outer termini. These could then be

linked by a grid-based system of swift buses into and through the centre. The recent introduction of fully electric buses might allow for running along routes where more noisy, diesel vehicles would be resisted by residential communities.

Public and private resources are also being used to strip out other one-way systems and gyratories that have unquestionably harmed the look and feel of the West End. Their transformation will perhaps signal the final chapter in London's 50-year struggle with urban clearways and motorway boxes. Changes to road space raise important policy questions on the future of traffic in central London and the congestion charge. Since 1980, car user volumes coming into the centre in the morning peak have fallen by around two thirds, from 184,000 to 65,000. This is reflective of a broader reduction in vehicle mileage seen in London.[12]

Perhaps remarkably, despite significant reductions in traffic volumes, congestion has actually increased. Road speeds have been falling.[13] This outcome (which has also occurred in the years since the congestion charge was introduced in 2003) may in part be attributed to a transfer of road space and junction capacity to pedestrians and cyclists. It may also be related to the tens of thousands of holes that are dug in the city's streets every year.[14]

Measures to improve air quality – such as emission-free buses and pedestrianisation – may provide the opportunity to reduce the impact of motorised transport more generally. Depending on how plans for Oxford Street unfold, policymakers may perhaps be tempted to explore more ambitious ideas to remove traffic from central London.

Whilst major projects are important for the long-term vitality of the West End, maintaining the human scale and the intricacies of the district are important to its character and attractiveness. Improvements to make it easier to move around the West End and its hinterlands are vital. That means enhancing the quality of the district as a place for walking, some cycling and other more benign modes of travel.[15]

Combined with Crossrail and other transport improvements, the West End stands at the edge of a new era of growth and prosperity. Careful planning and implementation of many of the new transport projects highlighted above should allow London's heart to "remain aglow" for another hundred years.

Endnotes

1. Data for the West End specifically (and the definition of the West End is in itself a matter for some debate) is not straightforward to come by. However, we do have data for Central London – the area that roughly comprises Zone 1 – encompassed by the Circle line (of which the West End forms a major part).
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Mixology – a new planning framework

Sandra Jones and Rob Harris

The West End is a small, dense, economically vital part of a city that is set to grow from around 8 million people to 10 million within two decades. Land comes at an enormous premium – the most cursory glance at prices and price growth will confirm this for anyone who happens to be in any doubt.

When the pressures of demand for space are at best robust and at times overwhelming, how can we even begin to decide how to allocate land to the most deserving use? How can the demand for offices, shops and homes be balanced, along with the need for infrastructure and servicing?

Competing uses

Cities are dynamic entities: a successful city is one that is more dynamic than its competitors. It is essential that a city can flex and adapt to changing circumstances. Hence, planning systems should provide a framework that supports fluctuations throughout the process of change, yet is able to protect against short-term gains that threaten long-term balance.

When, if ever, is it appropriate to protect or even promote specified uses? If it is, then not only do we need a fair way to identify the most deserving uses, but also a way to show which are most expendable.

There is a sense among some stakeholders that land prices, for example, are changing the nature of the West End and that there is a need for policy intervention in order to preserve a successful balance of uses. Here, we'll look at the question of the West End's capacity to cope with growth, and in particular the tension between the demands for commercial and residential space.

Commercial space is a broad term, and planning is often used to arbitrate between the conflicting demands of office and industrial uses, industrial and bulk retail, secondary retail and offices, hotel rooms and offices, the night-time economy, and residential spaces. But the focus of this essay is one that has raised the real prospect of a damaging imbalance in the West End: namely, the competing demands of office and residential space.

There's history to the ebb and flow

It is worth emphasising at this point that the West End is constantly changing. Even within a relatively recent historic period, much has happened, and the propensity for history to repeat itself is sometimes striking. In the aftermath of the Second World War, a potent mix of planning rights for change of use, sharp increases in taxation, and a major external shock to the national political and economic landscape transformed the balance of land uses in the West End. We have been experiencing similarly strong forces of change in the period since the 2008 global financial crisis, and withdrawal from the EU could prove to be a significant aftershock.

Temporary Office Permissions (TOPs), granted during the 1950s to make provision for businesses displaced by bomb damage, allowed 1.2m sq ft of residential property to be converted into office space. Very high personal taxation had already undermined the demand for luxury London homes – and the political and economic upheaval of the time needs no explanation.

By 1960, one-third of Mayfair's built stock was already in use as offices, and by 1970 the proportion had risen to two-thirds. Mayfair's mansions became embassies and corporate headquarters. The West End became home to the property industry, with a very tight cluster of developers and their advisors in Mayfair. However, purpose-built corporate office buildings remained rare (one notable example being Berkeley Square House, built in the 1930s). TOPs gradually expired in the 1970s and 1980s. At first, landowners fought to retain their office consents: after all, commercial property attracted far higher values than residential at that time. However, by the 1990s, most buildings originally designed as homes had reverted to their original use.

Meanwhile, in the City, there were enormous structural changes in the way business was conducted following the Big Bang in the late 1980s. The nature of speculative buildings made a step change in quality and specification. Workplace technology, air conditioning and open-plan working all put new demands on the building fabric, such as the need for large column-free floors and deep floor-to-ceiling heights.

Growing sophistication in the way corporates managed their real estate put an emphasis on property overheads and operating costs and led to higher occupancy densities, offshoring, automation of back office functions and, eventually, agile working.

So the West End, with its small scale, high-priced stock, much of which was designed for domestic use, found that it could no longer meet requirements. Some new buildings were erected, such as Lansdowne House in Berkeley Square (which Saatchi & Saatchi took in its entirety at a record rent), but generally, plots were not available. This is what encouraged fringe developments in the 1990s.

Throughout the 1990s and the early years of the new millennium, there was a subtle but determined shift from commercial to residential uses in the West End. In the commercial sector, demand from smaller occupiers, notably hedge funds and private wealth managers, not only sustained rent levels but drove them rapidly upwards.

Large parts of Mayfair and Marylebone were repopulated, albeit by a relatively narrow demographic base. It was largely a positive process of change, restoring a resident population at weekends and evenings that complemented the transient daytime office workers. Residential values overtook offices in the most desirable parts of Mayfair around 2004: soon after this, the West End began to lose office stock on a large scale.

The history of ebb and flow in demand shows that there is no 'permanent' or 'steady state' position. Planning must be adaptive: it must be knowledgeable about the forces driving change and the specific needs of emerging demand.

At the same time, the West End continues to grow: and so there is a need to balance the pressures of change. It may be inevitable, and even desirable, that some uses will be squeezed out of the West End – part of the natural process of a dynamic city – but in the period since 2008, the pressures of change have accelerated, bringing with them threats to

the character of the West End: threats to the street scene and skyline, and threats to economic and social diversity.

The stresses and joys of a dynamic city

In the residential sector, as the economy confronted a recession following the 2008 financial crisis and demand for commercial space faltered, the enthusiasm for high-value residential property from buyers across the globe only intensified – underwritten by London's 'safe haven' role.

Established communities began to express concerns over disruption caused by investor activity, with higher rates of churn, more part-time residents, more absent owners and soaring prices. There was a debate about the role of towers: our own study for Westminster City Council[1] showed that the social mix was narrowing. It was widely acknowledged that low-paid workers in sectors such as hospitality, healthcare and personal services were increasingly excluded from areas within easy travelling distance of their workplaces.

By 2015, the average cost of a home in Westminster was £860,000: 20 per cent of all sales were over £2m and the most expensive homes were selling for upwards of £5,000 per sq ft.

In theory, high-value new development secures the delivery of affordable homes through planning obligations. In practice, Affordable Housing contributions have been falling far below targets set by the Greater London Authority. The shortfall has been largely blamed on weakness and inconsistencies in negotiations over viability assessments and threshold values.

The cost of renting office space carried on rising too, especially in the parts of the West End with the kind of domestic-scale building stock that lent itself to residential conversion. Prime office rents reached £120 per sq ft in Mayfair/St James's, a little under twice the cost of rents in the City. For a small business of, say, 50 employees, that translates into about £600,000 per annum – or closer to £1m if business rates are included.

And yet, for all its ability to adapt, the West End is under enormous pressures. Many small businesses find it increasingly difficult to maintain their presence in the West End. Our study of small offices and mixed use in London's Central Activities Zone (CAZ)[2] showed that rents for small units in Soho had risen by 81 per cent in the decade to 2015, and that

rental values were the second-highest in all of London – exceeded only by Mayfair/St James's. It is clear, on this measure alone, that the competition for space is intense.

The sharp rises in commercial rents reflect restrictions in supply, not least because of the loss of office space through conversion to residential. Between 2005 and 2015, Westminster City Council granted planning consent for over 2,000 residential developments that could result in the loss of over 9m sq ft of office space: more than half had already been lost by 2014, with the remainder in the pipeline.[3]

The scale of losses in Westminster dwarfed any other Inner London borough. Indeed, the City and Tower Hamlets (Canary Wharf) experienced substantial net gains of office space amounting to some 10m sq ft each over the same period.

Westminster City Council has recently introduced measures to stem the loss of office space, illustrating how planning systems can adapt and respond to market signals. But can it maintain the balance of competing demands?

Planning for the next iteration

The commercial property market generally has an aversion to planning intervention, preferring, for example, land values to be determined by supply and demand dynamics alone. But the context of growth and change in the West End, as outlined above, suggests that planning must become 'smarter', and work with many stakeholders to manage the evolution of the West End without 'cramping its style'.

Moreover, it must recognise the potential loss of business activity to competitor locations with the capacity and affordable space to attract emerging demand – in particular, the growth of small businesses with increasingly agile and collaborative workers.

Working with neighbouring boroughs

The West End has evolved from a dual office market – the area in and around Mayfair, and Victoria – into a complex mosaic of sub-markets. The functional boundary continues to evolve and expand in a successful adaptation that should be encouraged through active collaboration with neighbouring boroughs.

Policy should respect and encourage this trend because it concentrates employment largely in the areas of greatest accessibility (transport interchanges). Opportunities might be sought to reinforce the now-established pattern of supply around the CAZ periphery. Borough boundaries should not impose artificial limits on the natural dynamism of the West End. The CAZ has been used successfully to apply common approaches across borough boundaries, as the heart of the West End seeps over a wider area. We suggest that the CAZ should be extended to include a Central Activities Transition Zone (CATZ) around its periphery. This would recognise the role played by secondary property in providing affordable space for businesses unable to pay prime rents.

Affordable small workspaces

At the same time, spatial policy should seek to ensure that opportunities exist for all types of occupiers within the central area – in particular, to safeguard space suitable for small and young businesses. Such businesses are squeezed by rising rents and are not favoured by traditional landlords.

Policy should actively encourage the provision of flexible space and the retention and repurposing of older, multi-let or secondary space as a cost-effective option. In this sense, we support the exemption of the West End from Permitted Development Rights, which have led to the conversion not only of redundant office stock but also older stock in active use.

Policy should also encourage large and small occupiers to coexist in flexible spaces. We suggest that office developments over a threshold size (say 150,000 sq ft) should be required to set aside space for small, flexible and affordable units, in much the same way as Affordable Housing is an obligation in residential developments.

Knowledge workspace

While acknowledging the importance of maintaining a balance of office and residential uses, we would also advocate policy that allows flexibility between different types of workspace. The distinctions between office and production activities are increasingly blurred, and we believe that this blurring should be accepted – even encouraged – under a single category of 'knowledge workspace'.

Building community

The speed with which change has occurred in the West End over the past decade or so has been unsettling for residents and workers. Our work on prime residential investors[4] highlighted real concerns over the impact on existing communities, especially when homes have been acquired by absentee investors.

We suggested that a 'Community Contribution Tax', levied on homes occupied for less than 90 days a year, might allay some of these concerns. This would be a hypothecated tax spent locally on a community activity or facility. The neighbourhood forum might be an appropriate administrative unit.

Affordable Housing

Various ideas have been mooted to improve the provision of Affordable Housing, including greater transparency in viability assessments or fixed, non-negotiable housing targets, mirroring the certainty in the CIL payments. Neither is a straightforward solution. For example, fixed targets would mean starting negotiations at a lower level of provision, and would impact disproportionately on sites bought before the changes.

The idea of collaboration between boroughs – whereby development in a central or high-value borough might result in Affordable Housing built on lower value land in another – is mired in controversy but might need to form part of the solution.

A framework for change

London is facing enormous pressures for growth. We have shown here that London has a long and proven track record of accommodating change, but that there are real risks of it losing business activity to competitor locations more able to deliver affordable workspace for an increasingly agile and collaborative workforce.

London needs to have a planning framework that allows it to flex and adapt to changing circumstances, yet is able to protect against short-term gains that threaten long-term balance. All our policy recommendations ask for collaborative responses: to extend the coverage of existing protection for employment space over a wider area; to encourage large and small businesses to share spaces; for the boundaries between types of

workspace to be blurred; for absent homeowners to contribute to their communities; and for boroughs to work together to improve the provision of affordable housing.

These policy recommendations also recognise that protecting the balance of uses does not mean preserving the status quo, but consciously and sensitively finding ways to accommodate change.

Endnotes

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Planning a global neighbourhood

Tony Travers

Planning in Britain is a politically determined process in which different levels of government have overlapping responsibilities. In London's central areas, there is both collaboration and competition between institutions, largely resulting from the historically evolved government arrangements for the centre of the capital.

By sustaining its ancient borders, the City of London generated pressures for a number of self-governing administrative units in the sprawl that grew outside the City itself. Over time, these units have been merged into today's boroughs. The need for metropolitan services has, since 1855, led to the creation of no fewer than four (arguably five) city-wide government models.[1]

Setting the historical context

It is worth rehearsing this history before considering the issue of contemporary planning in the West End. When the London boroughs were being created in the early 1960s, there were proposals for a single authority for central London. MPs Eric Lubbock and John Parker suggested that central London (including parts of nine of today's boroughs) should be brought together into a single authority. The minister rejected this idea, as he did an alternative proposal that the Greater London Council (GLC) should be the sole planning authority for central London.[2]

If either of these models had been implemented, the West End (as part of central London) would have been governed in a different way today and would possibly have been planned in radically different ways. If the GLC (and, later, the Greater London Authority, or GLA) had been responsible for planning in central London since 1965, there might,

for example, have been greater clustering of towers. But there might also have been more towers – because local resistance could have more easily been overcome. This latter difference might also have allowed more motorway-type roads to be built through the West End, in line with early GLC priorities. Piccadilly Circus and Covent Garden would almost certainly have been comprehensively redeveloped, complete with modernist towers, rather than preserved.

As it is, the West End remains at least as much a concept of mind as of geography. It is also a place instantly recognisable to people who have never been to London. The West End, with its shops, bright lights and 'Eros' at Piccadilly Circus, is an agreed representation of London for millions of non-Londoners. 'The West End' is, for actors, a synonym for what is probably the world's largest cluster of theatrical activity. The term is also used popularly to mean the Oxford Street and Regent Street shopping area centred on Oxford Circus. 'West End' appears on road signs and is even a term used by borough planners.

However, unlike (for example) the 'City of Westminster', it does not have an agreed boundary. Soho is always in the West End; but Victoria, St James's, Holborn, King's Cross or Paddington can, by choice, be within or outside it. My West End is different to yours.

Most people would broadly accept that the West End includes all of the W1 postal district, plus the western fringes of WC2 and WC1 and also the northern edge of SW1. Bits of NW1 (at Edgware Road and Euston) might squeeze in, as might a sliver of W2 in Bayswater.

Who controls planning in the West End?

The area is designated as 'the West End' for planning or other purposes carries with it two consequences. First, it is only a part of London's central business district, and second, it falls within the jurisdiction of two boroughs (Westminster and Camden) and the GLA. Central government is also involved where major developments are 'appealed' to the Secretary of State. There are also quangos, notably Historic England and the Royal Parks, with statutory local roles. Three MPs and two London Assembly members represent the area.

Manhattan and central Paris fall within the direct responsibility of a single city government planning system, with little more than advisory

powers given to other organisations. The West End's history means it was not planned in the way Manhattan's street grid or Paris's boulevards were. The West End is a microcosm of the wider London planning system: it is both fragmented and flexible.

As the result of hundreds of years of organic development, the West End is full of character (which is a good thing) and yet can be incapable of rapid reaction to threats (which can be a problem). The quality of the streets and the wider environment are similarly a mixture of the good and bad.

There is no regularly produced West End Plan or Central London Plan. Westminster, Camden and the Mayor of London each have plans for part of the area, but cannot realistically impose a regime of densities, tall buildings, road uses or public transport operations without the agreement of the others. For example, the Mayor's bus network uses Oxford Street as a through-route across the West End. To make radical changes to this, City Hall and the two boroughs would have to agree about the reforms. The electoral dynamics of relatively small boroughs and their wards make agreement about metropolitan-scale reform difficult.

Changing needs

The requirements of the post-industrial West End of London have changed, even as compared to 20 or 30 years ago. While still the home of national institutions, cultural industries, retailing, hotels, teaching hospitals, universities and company headquarters, many central London economic sectors and activities have declined during the past 50 years, including clothing manufacture, warehousing, showrooms, wholesale markets, street vendors, cinemas and independent shops.

Financial services companies now operate from relatively small properties in Mayfair, Soho and Fitzrovia. Universities have significantly expanded. The requirements of office users have changed.

Growth in the number of restaurants, bars, and nightclubs – and the development of a large 'night economy' – are obvious signals of evolution within central London. The introduction of a huge night bus network and the opening of the Night Tube are evidence (and causes of) the scale of change. In addition to this economic change, the number of residents in the West End has increased.

Planning policies have kept the largest shops on or close to existing major thoroughfares, while in recent years there has been a willingness to allow the development of some of the area's most attractive new facilities in locations a short walk away from the main tourist streets.

Covent Garden is a triumph of intelligent conservation over the bleak modernism proposed in the 1970s. Market Place, Lancashire Court, Kingly Place and St Christopher's Place now offer smaller-scale retreats just off Oxford Street, Regent Street and Bond Street. A short walk away, Charlotte Street (Fitzrovia), Marylebone High Street (Marylebone) and Berwick Street (Soho) are developing into distinctive neighbourhoods within the core West End.

Westminster City Council has evolved policies that seek to avoid tall or otherwise radical developments within its part of central London. The council has respected the historic scale and purposes of the area while attempting to allow a degree of change. In Mayfair, St James's, Regent Street and Marylebone, the great estates have rebuilt their terraces within existing frontages. Streets have been actively managed and less desirable uses removed. Only a handful of taller buildings have been constructed, and these date from the 1960s.

Camden, which is responsible for about a quarter of the West End, has pursued broadly similar policies to Westminster's. Fitzrovia and Covent Garden are shared by the two authorities and most visitors to the West End would find it hard (apart from street signage) to observe much difference as they cross the border. Both councils are involved in the West End Partnership, initiated by Westminster, to improve the quality of the West End.

The West End faces greater competition than in the past. Knightsbridge and Sloane Street have long been nearby competitors. Sophisticated modern shopping developments in places like Stratford, White City and Canary Wharf, or the improvement of Cheapside by the City of London, are clear evidence of competitive change within a short tube ride.

Burgeoning and eclectic new districts are emerging in inner east London and in market-type developments (some old, some new) in places such as Camden Market, Borough Market at London Bridge, and Ropewalk in Bermondsey.

Moreover, overseas travel now means that downtown Paris and New York can be visited for the weekend. The West End needs not only to adapt, but also to manage intense development demands.

Planning for the future

The GLA (in effect, the Mayor) is responsible for the London Plan, which sets a planning framework for the whole of the capital. There is a section on the Central Activities Zone (CAZ) which includes the West End, the City, Regent's Park, King's Cross, Shoreditch / Clerkenwell, the South Bank, Belgravia, Hyde Park / eastern Kensington and Battersea / Nine Elms. The Isle of Dogs, though outside the CAZ, is treated similarly.

According to the London Plan, "The Mayor will and boroughs should … use the CAZ boundary as the basis for coordinating policy to address the unique issues facing the Zone".[3] The "unique issues" now facing planning in the West End include the need to accommodate the extra commuting, shopping and other activities that Crossrail will generate when it opens in 2018. In addition to Crossrail, the West End needs to be able to offer more offices, retail and homes in response to increasing GDP. Such growth will increase the demand for development within an already densely developed and dynamic area.

Government proposals to reform local authority finance will require councils to increase development to be able to sustain their income. Westminster and Camden, working with the Mayor, face the challenge of how to increase development and economic activity without damaging the ecosystem of the West End.

To achieve this, the two boroughs and the Mayor will have to consider the adoption of a number of planning policies, including:

- Allowing permitted development (i.e. with fewer laborious planning procedures) for properties to build up one or two floors, as long as broad aesthetic considerations are adhered to.
- Higher development densities to be allowed on any site where public transport access is good.
- Larger buildings (not necessarily tall ones) where there is no damage to protected views.

- A comprehensible and consistent policy on the clustering of tall buildings.
- The use of compulsory purchase powers to allow larger sites to be assembled in order to make larger-scale and denser new buildings possible.
- An experiment with zoning to facilitate automatic trade-offs between the scale of new buildings and public realm improvements.
- Greater statutory planning controls (and full enforcement) over nuisance and noise to compensate residents for the impacts of development.
- Rethinking central London road-use policies to improve the environment and ration the use of road space.
- Continued cooperation between Westminster, Camden and the Mayor about West End development policy.
- Occasional use of Mayoral Development Corporation powers (or similar short-term interventions) to address the periodic need for change within the West End.

Many or all of these policies taken together would make it possible for the West End to grow within its existing area. To allow such expansion to occur, it would be necessary for the governing authorities of the West End to operate effectively and with purpose.

The existing arrangements have allowed cautious development, reflecting significant sensitivity towards local wishes. But there is an ongoing conflict between the needs of the centre of a large city-region and the needs of its residents. As stated above, the arrival of Crossrail's additional rail capacity will intensify the need for planned growth.

Westminster, Camden and the Mayor will have to broker a deal over how the West End can continue to grow while protecting the quality of life within the area. Issues such as limiting the number of buses in Oxford Street and Regent Street; providing an attractive, less congested environment; and attracting unique retailers, leisure activities and spectacles to the West End will require medium-term planning and funding. Some of this programme is now being considered by the West End Partnership, but there will need to be a concerted effort to ensure that change takes place.

The councils and City Hall are aware of the challenge now facing the West End. The fall in the value of the pound caused by Brexit will almost certainly provide a short-term tourism boost for the West End and London more generally. London remains a stable and relatively safe city to visit, so retailers, theatres and restaurants can expect 2016 to be a good year.

However, the pound will strengthen again in time, and the West End will have to compete in a less-favourable international environment. The positive news is that the West End (and, indeed, London) remains an incredibly powerful brand for Britain. It is a round-the-clock, exciting, open, tolerant, welcoming and endlessly changing place. There is nowhere like it.

Looking ahead, city planning needs to secure higher densities, improved design, better streets, less noise, reduced pollution and more effective security. If we can accomplish all this, the West End will continue to prosper.

Endnotes

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Boulevards – the future of the West End's great streets

Peter Murray

When you think of London, you don't necessarily think of boulevards. The wide, sweeping streets of Paris aren't part of London's planning language, and yet the West End is defined by its boulevards: Oxford Street to the north, Park Lane to the west, Charing Cross Road to the east and Pall Mall to the south. It is bisected vertically by Regent Street and horizontally by Piccadilly.

These are grand streets with the potential to enhance the area. They are key civic spaces, often with great architecture, yet they are swamped by motor vehicles – buses, vans, cars and HGVs. In the main, they are overcrowded, polluted and dangerous.

To see boulevards at their best, wander along Strøget in Copenhagen, Istiklal Avenue in Istanbul, Avda Constitución in Seville, and Rue Ste Cathérine in Bordeaux, where pedestrians safely stroll – and spend money – in car-free streets while trams and cyclists glide through shared spaces. It makes you wonder why London has put up with these awful environments for so long.

Oxford Street schemes that never were

Planners and politicians have been arguing about improving the West End's roads since the Buchanan Report of 1963. Colin Buchanan himself described the state of Oxford Street as "a travesty of conditions as they ought to be in a great capital city". But in those days movement was king: Lord Holford's comprehensive redevelopment proposal for Piccadilly Circus was rejected, not because of the destruction it would have caused to the landmark, but because it would have restricted traffic. The removal of private cars from Oxford Street was only won because the bus lobby thought it would allow buses to move more freely.

There have been numerous ingenious plans for overcoming the complex problem of making a better place and keeping the traffic moving. One, by the architect Bryan Avery, proposed a pedestrianisation scheme for Oxford Street with a covered mall from Marble Arch to St Giles Circus; buses would run on its roof, unimpeded by pedestrians or cross streets. Bus stands would be located at convenient intervals and journey times would be considerably improved.

In 1983, a special joint meeting of the Highways and Planning Committees of Westminster City Council recommended that "these proposals merit further study by this council, the GLC, and other public bodies, as well as discussions with the public". But nothing happened.

Back in 1992 Christian Wolmar, transport journalist turned mayoral candidate, highlighted the dangers of Oxford Street: the 250 people hit by vehicles in that year, the six deaths and the unacceptable levels of pollution. The responses, then as now, reflected the difficulty of pleasing all the major stakeholders. The Oxford Street Association feared that pedestrianisation would deter customers. Taxi drivers suggested that they would be forced to take long and expensive detours. Westminster City Council thought pedestrianisation impractical because there was no alternative east-west route.

Ken Livingstone's plans of 2006 included a terminus at Marble Arch and a tram that people could hop on and off. The New West End Company welcomed the fact that such policies would turn Oxford Street into a "people place". John McAslan + Partners was commissioned to do a feasibility study for the introduction of trams. But again, nothing happened.

The future of Oxford Street

The current Mayor of London Sadiq Khan has called for pedestrianisation by 2020. The 'p' word strikes fear into the hearts of many retailers, as well as the residents of streets who believe they will be affected by diverted vehicles.

But what does pedestrianisation mean? While a reduction in the overall volume of traffic must be a key part of future plans, the endgame might not be a totally bus- and taxi-free street from end to end, but one with enhanced public realm in specific locations. It might, for instance,

involve the creation of new spaces between north-south trafficked roads; or a whole row of new public squares in the heart of the capital, with attendant opportunities for reimagining what a London boulevard can achieve.

Whatever route is selected, something needs to start happening soon, as the launch of Crossrail in 2018 draws ever closer. A report in 2014, authored by Alex Jan of Arup, indicated that Bond Street, Tottenham Court Road and Farringdon stations will deliver some 745,000 people to central London per day by 2026. During the average weekday afternoon peak, it is projected that 34,000 passengers per hour will enter and exit Bond Street station alone. The current infrastructure of pavements and crossings simply cannot absorb such an increase.

In June 2015 the West End Partnership launched a Vision for the West End, which suggested that Oxford Street West (the area to the west of Oxford Circus) should be "the world's best outdoor street shopping experience, achieved by a reduction in vehicles with greater use of surrounding streets for loading, servicing and taxi pick-up", accepting that any solution for Oxford Street needed to include the hinterland as well.

Peter Vernon, CEO of Grosvenor Estate and Vice Chairman of the West End Partnership, rounded off the speech in which he introduced the Vision report by saying that changes to Oxford Street can be the "launchpad for reimagined districts north and south of it". There was little mention of getting rid of traffic.

Following commitments made in his election manifesto to pedestrianise Oxford street, Sadiq Khan announced in July 2016 that vehicles would be banned from Tottenham Court Road in the east, to beyond Selfridges in the west by 2020. A final stretch, up to Marble Arch, is due to be completed by 2025.

Oxford Street East, with its smaller units and shabbier shops, has long been the poor cousin of the stretch between Oxford Circus and Marble Arch, but change is on its way. The redevelopment of the old Rathbone Place Post Office site, two Crossrail station exits, the award-winning Zara store, the redevelopment of Centre Point, and public space improvements around Tottenham Court Road station are giving the area a much-needed boost.

The Park Lane problem

The wider Oxford Street improvements might give some impetus to plans to reduce the dominance of traffic in Park Lane and upgrade connectivity to Hyde Park. In 1996, the Grosvenor Estate looked at the idea of linking their ownerships on the east side of Park Lane to Hyde Park by placing the eight lanes of traffic in tunnels and extending the park over the top. The idea was later reprised by Boris Johnson in his *Way to Go* transport strategy of 2010, but went no further.

More recently, the architect Liam Hennessy presented a simpler scheme at a New London Architecture conference, which proposed widening the four-lane northbound road to accommodate two-way traffic on the surface and turning the southbound carriageway into a wide pedestrianised boulevard. No trees would be removed and all the extra space required would come from the currently inaccessible central reservation.

The Grosvenor Estate supports the idea, but would only participate if it received the blessing of the Mayor, TfL and Westminster Council, according to its surveyor Nigel Hughes.

Tackling Pall Mall and Charing Cross Road

The other two sides of the West End perimeter, Pall Mall and Charing Cross Road, are making better progress. They form part of a London-wide plan to get rid of gyratories in places like Vauxhall, Elephant and Castle, Baker Street and Aldgate. Rolled out in the 60s and 70s, these certainly sped up the traffic, reducing permeability as well as quality of place, but did little to reduce congestion.

To the south of the West End, Pall Mall and Piccadilly have been transformed from one-way racetracks into more amenable two-way streets, increasing permeability and reducing the isolation of the St James's urban block. Other improvements to the streetscape and public realm have since been carried out in Lower Regent Street, Waterloo Place and Haymarket with wider pavements, new street lighting, less street clutter, better pedestrian crossings and Yorkstone paving.

Work has yet to start on similar improvements to the eastern boulevard. Charing Cross Road is the boundary between Camden and Westminster. Scruffy and careworn, it is the scene of many battles

between the two boroughs – not least in recent years over the improvements surrounding the entrance to Tottenham Court Road tube and Crossrail station. As the LSE's Tony Travers frequently points out, edges – particularly those between boroughs – are unloved, uncared-for, and often places of discord.

Back in 1961, Tottenham Court Road and Charing Cross Road north of Cambridge Circus were made one-way northbound, while southbound traffic was routed one way down Gower Street. This isolated a big chunk of Fitzrovia, segregating it from Bloomsbury while doing little to achieve its original aim of reducing congestion.

There is a plan that, by the end of 2018 when Crossrail opens, traffic on Charing Cross Road and Tottenham Court Road will be restricted to buses and cycles during the day. Gower Street will revert to two-way use with a segregated cycle route. Taxis and delivery vehicles will be barred from using Tottenham Court Road as a through-route, while new landscaping in the area will improve the pedestrian experience.

Improving the public realm

Existing infrastructure and congested underground conditions in most of these improved boulevards sadly make tree planting impossible. This is unfortunate: as well as making the urban landscape more pleasant, trees have a positive impact on air pollution, the urban heat island effect, noise pollution and mental wellbeing. In addition, according to Peter Heath of Atkins, the long views of historic Grade I buildings along Pall Mall from St James's Palace to the National Gallery are important townscape assets that would be obscured by trees.

In Charing Cross Road, the need to cater for pedestrian surges and the dense underground services (including a large unused tram power route tunnel running north-south just below the surface) have also made tree planting impossible. There are ways that these streets can be improved without major works – better street finishes, wider pavements, well-lit buildings, new architecture that addresses the street, and more sustainable urban drainage systems (SUDS).

SUDS should be the accepted norm for all road improvements in the capital. Increasingly severe storms, when rains run off the streets straight into the drains, are overloading Joseph Bazalgette's 19th-century sewer

system. The solution is to create small landscaped areas which absorb the run-off and delay its passage into the drainage system. These pockets of landscaping both enhance the street and deliver a more sustainable city.

To relieve overcrowding on pavements, the West End boroughs could take a leaf out of the City of London's book and fix street lamps to buildings, rather than cluttering pavement with bulky posts.

The West End boulevard where these ideas are most successfully displayed is, of course, Regent Street, created by John Nash in the early 19th century. It has hugely benefited from the single ownership of the Crown Estate, which has delivered good stewardship and public space improvements – including the Oxford Circus diagonal crossing, the peninsularisation of Piccadilly, and the more recent re-creation of St James's Market between Haymarket and Lower Regent Street.

Practical proposals

Within the approximate geography of the urban box described above, Alex Jan has proposed a plan entitled *The West End Weave*, a long-term strategy of improving the complex network of streets that covers the West End with dedicated routes – providing priority to certain transport modes depending on location, character and local context. The endgame is "a more coherent, better-connected, safer and healthier West End".

In the 50 or so years since the Buchanan Report, thinking about traffic in towns has shifted to a more satisfactory balance between strategies for movement and strategies for place, as set out in TfL's *Street Types for London* strategy. Accommodating traffic, absorbing the huge growth in pedestrian numbers that will be generated by Crossrail, reducing pollution, and improving placemaking in the West End are all complex undertakings with many stakeholders to be satisfied. Leadership is needed that reflects the appropriate balance of interests and sets out a clear framework for better coordinating policies on walking, cycling and public transport – as well as taxis and delivery vehicles.

According to Deputy Mayor for Transport Val Shawcross, the "blockage and resistance" to pedestrianisation of Oxford Street is around the deployment of buses in central London. "TfL had become stuck in a bit of a time warp – God bless them," she says. Shawcross is now *ex officio* the Deputy Chair of TfL and in a position to make things happen.

More coordinated and longer-term thinking may also result from the New West End's successful creation of a Business Improvement District. Property owners have a real interest in the long-term value of their holdings: they look after them well and benefit from the increase in value generated by improvements.

In 2004, the influential Danish planner Jan Gehl wrote a report about improving public space in the West End entitled *Towards a Fine City for People*. When he returned to London a decade later, he made no bones about his disappointment at the rate of progress. Today, though, he would surely be impressed by the improvements to St James's and Pall Mall (in spite of the poor provision for cyclists), make positive noises about the proposed improvements to Charing Cross Road, and support the long shot of Hennessy's Park Lane proposals.

If Sadiq Khan can push the stakeholders of Oxford Street and its environs to create a place that compares in quality with equivalents in foreign cities, he will have succeeded where many have failed – and he will leave a legacy to sit beside that of Nash and the Prince Regent.

Designing for density

Brian Girard

There is no better prototype of dynamic mixed-use urbanism than the West End, and its density is integral to its appeal. It is a concentrated, energised place with a lot happening at once, and is perhaps the ultimate aspirational urban destination in Europe.

Much more complex than a designated central business district, the West End is an endlessly diverting place of discovery comprised of a patchwork of districts with their own individual character. Collectively, these districts form the vital, atmospheric and tolerant centre of a great city. Density sustains these cosmopolitan qualities.

Every city has its own native density, and new growth must evolve within this prevailing scale. We often hear that London is the least dense European capital: but how dense is the West End? The measure of density most relevant to development is the plot ratio, which is the total amount of built area divided by ground area (including streets).

The more dense parts of the West End such as Covent Garden, Soho and east Mayfair have plot ratios in the 2.5 range – relatively low compared to the commercial centres of other cities. Some parts of Haussman Paris are as high as five, and the area of Midtown Manhattan around Grand Central Station is around 10.

What is density?

Built volume is one measure of density, but we should also consider more qualitative assessments. As the commercial centre of London, the West End is a vast marketplace, with an incredible density of transactions. It is also an innovation hub that generates a great density of ideas. And a diversity of functions happening in a compact footprint supports a density of experiences of infinite variety.

Ask anyone about the West End and the theatre lights go on in their minds, illuminating their own experiences. I visualise a sprawling

landscape of places, people and activities; in the same way that an evening walk across Soho reveals a dense web of relationships, equal parts sophisticated and chaotic, shiny and rough. Ultimately, density attracts people, supports quality of life and makes great places.

As successful as it is, the viability of the West End as an economic powerhouse needs to be continuously assessed. This is what local stakeholders have been doing in anticipation of the transformative changes of Crossrail, which will deliver 120,000 additional people into the area daily.

The City of Westminster seeks to create at least 77,000 new jobs in the borough over the next 20 years, a substantial percentage of which are likely be concentrated in the West End – particularly in the parts with lower existing employment density. There is a consensus that more capacity in the West End is possible, and that the accommodation of more people will make it a stronger district for years to come, but the configurations of buildings and public spaces built in response to this growth do need to be finely calibrated to maintain the intrinsic qualities that attract people in the first place.

Our clients at KPF wish to further activate the commercial potential of this urban energy source, often by increasing the density of their properties. In this predominantly horizontal swathe of London with only three tall buildings (all built in the 1960s), proposals rarely exceed 10 floors. They are typically infill sites, conversions of existing buildings, or redevelopments of what were originally post-war development sites.

The historic character of the district is remarkably intact, attributable to the enlightened oversight of the City of Westminster over the past 30 years. Still, the fabric has the potential to evolve and, in some cases, facilitate higher densities. Our experience of designing for density in such an important and sensitive context has been guided by five considerations:

1. Go with the grain

Each period of history adds a successive layer of growth to the West End. It is in a state of continuous evolution, as evidenced by the spectacularly eclectic mix of architectural styles along its streets. New configurations of density should be conceived as contemporary layers applied to these existing orders. Although the estates can assemble larger and

more efficient development sites, it is only through respecting the scale and grain of the historic fabric that they will successfully integrate with the place.

Overall, there is a fineness to this context that is not easily reconciled to the scale of modern development. Compactness is an intrinsic attribute that should inform the scale of new buildings. The prevailing grain that established the scale and character of Covent Garden, Soho, St James's, Mayfair and Marylebone is based on the narrow plots of terrace housing that emerged from medieval streets in the late 17th century and Georgian era.

Westward urbanisation in the 19th century brought an overlay of theatres, markets, warehouses and institutional buildings. Larger-scale buildings came in the early 20th century, such as the office buildings of Regent Street and the department stores of Oxford Street. Post-war reconstruction brought some taller buildings, but more typically added wide blocks that absorbed adjacent sites of bomb damage.

When the underlying urban grain informs the massing of a building, it stands a better chance of feeling integrated into the surroundings. New development sites are often opportunities to restore a missing section of grain which may have been previously erased.

Presently under construction in Covent Garden, Kings Court will be a mixed-use destination consisting of an assemblage of one new and six listed buildings around a new courtyard. The substantial new building replaces a broad 1980s office building that had previously concealed the historic grain of the site.

The modulation of the new architecture was informed by the plot widths of the terraced houses directly behind. Although the contemporary architecture does not overtly resemble the historic buildings, its scale and proportion were both determined by this underlying order. Shifts and displacements along these originating lines modulate the new facades.

2. Build networks

Sites for additional density should be located within a framework that considers a district in its entirety, in order to strategically distribute growth. These nodes of potential new density can both regenerate their

immediate surroundings and support an overall structure beyond their own footprint.

In this way, a district can be conceived and curated as a hive, or network. A network is the antithesis of a static monoculture in so far that it is a collection of interconnected, accessible activities linked by a shared platform. The districts of the West End are analogous to networks, with every possible city function flowing through as a part of a continuum: working, living, consuming, playing.

This fluid mix of different uses is central to its appeal and consistent with contemporary urban lifestyles fuelled by convenience and simultaneity.

The estate ownership structure of much of the West End has the potential to link related sites into larger networks of intensity, such as the Crown Estate's vision for St James's. In Covent Garden, we have worked with Capital & Counties on a master plan that identifies strategic sites for public realm enhancements, conservation initiatives, and new development intended to both regenerate their immediate precincts and collectively improve the viability of the entire estate.

The objective is to rebalance and curate the mix of uses to enhance the overall quality of the user experience. We proposed redevelopment 'anchors' for each quadrant of the estate to more evenly distribute footfall throughout the district.

Kings Court will be the first to be realised, in the quadrant to the northwest of the piazza: the proposed Wellington Hotel will be the anchor in the southeast. Each anchor both responds to its immediate surroundings with varied uses, scale and character, and supports the larger urban network.

3. Blur the boundaries

We should strive to make urban fabric that weaves architecture and public realm into a continuous experience, blurring the boundary between them.

A good urban building establishes relationships beyond its footprint. Instead of thinking of a large building as an autonomous monolith, consider what stands adjacent to it, and how the existing context can suggest subdivision and variation. In this way, a large redevelopment scheme can

be understood as a collection of site-specific environments more aligned with human experience.

A good example of this from the modern era is the Economist Plaza in St James's, which is perceived as a collection of buildings and public spaces as opposed to a single building. This diminishes its perceived scale and improves its relationship to the surroundings.

The integration of individual buildings in assemblage configurations with other buildings and the public realm can activate new synergies. We conceived of the architecture and the public realm of Kings Court as a continuous experience, so that the new development takes its identity from the spaces bracketed by its buildings. People will experience this place primarily as a courtyard and a network of new and enhanced mid-block passages, with the architecture in more of a supporting role.

Although more dense than the building it replaced, there will actually be more open space on the ground level. Selective concentration of density can enlarge the extent of the public realm.

4. Grow from the inside

The biggest challenge to realising additional density in central London is the perception that all new development is over-scaled and intrusive. Yet we can identify substantial sites for intensification in the hinterlands of urban blocks, which are largely underutilised and hidden from view.

The yards, courts and lightwells behind buildings and terraces are typically sites of unplanned built accretions, less likely to be of historical significance than other sites. On their own, these landlocked spaces are of limited benefit, but when combined with adjacent plots they can support increased density within a relatively stealthy profile.

Again, estate ownership can make this happen by associating impractically small structures with their neighbours in more synergistic regeneration schemes. New construction in the middle of blocks can be largely concealed from the surrounding streets – an approach to density that is particularly well suited to conservation areas.

New courtyards and pocket gardens can be carved from the interiors of larger blocks, and linked to surrounding streets by passages. These routes disperse pedestrian flows attributable to the additional density by relieving congestion on main pavements.

Further, the inner spaces become oases insulated from the intensity of surrounding streets.

Discovery of such urban rooms is very much characteristic of the West End. This was the approach at Kings Court, where what was formerly a landlocked space at the interior of the block between King Street and Floral Street was identified as a potential amenity around which a new place could be made.

A car park structure and various rear extensions were erased, allowing for both an increase in density and in the extent and quality of the open space. Beneath, a modern unified basement distributes shared services from a centralised energy centre to the individual buildings. This improves the sustainability and commercial viability of the existing buildings, again by way of association from 'within'.

5. Allow for surprise

While a degree of restraint is required to build responsibly in the West End, some provision should also be made for the randomness that is one of its core attributes. The haphazard and unpredictable layering of this part of London is the unstable foundation upon which we as architects try to find reason, but it is important that reason in approach does not work in isolation – surprise can also add an exciting new layer to this ever-changing scene in a positive way.

The evening walk across Soho is animated with unexpected discoveries like the turrets of the Windmill Theatre or the tower of the Brewer Street Car Park, features that delight by means of eccentricity and their refreshing difference from the surroundings. The theatres of the West End are among the more happy structures to be found anywhere, and serve as urban stage sets to the drama of the streets. And there are the thousands of unplanned moments of interest, where something modest rubs up against something glamorous, the diminutive sits next to the colossal, or the foreign borders the domestic.

It is hard to explain the difference between an eccentric event and an incongruous juxtaposition of scale, but the previously mentioned fineness – along with use of colour – is a crucial ingredient. Sometimes the architecture needs to lighten up. New configurations of density will invite the gaze if they in some way activate the human preference for

visual variety. We proposed something of a folly to activate the most prominent view of Kings Court down Floral Street. A towerlet of corner bay windows constructed in a filigree of steel and glass, inspired by the stacks of crates associated with the former market, stands opposite the Royal Ballet School Bridge further down Floral Street. The intention is that these two follies act as a pair to frame the space of the street – two unexpected events within the urban landscape.

The West End is very much a living palimpsest, as contemporary and up-to-date as any city, but with a powerful presence of the past. Such a perfect balance between intensity and the human scale is the source of sustained inspiration, and is what we strive to achieve when conceiving new environments elsewhere.

It is our responsibility to ensure that developments taking place in response to the requirement for growth are judged in the future to have positively contributed to the sensitive context in which they must necessarily take place.

Street life – a better public realm

Lucy Musgrave and Alex Arestis

The West End must adapt to changes in city life. Can a new approach – civic urbanism – ensure that development enriches the West End's unique character instead of eroding it?

In order to make informed decisions about the West End's future, and that of its public realm as the stage for city life, we first need to understand its essence. We need to study the conditions and complexity that constitute its character, how each development site or intervention can fit into and add to this district of shared spaces and overlapping experiences without diluting it. This calls for an analysis that is not simply spatial- or property-focused, but is also cultural, social and historic, and that understands patterns of behaviour and use. It requires a new approach: **civic urbanism**.

Civic urbanism considers the elusive and temporal as well as the built and architectural. It seeks to understand the unique experiential qualities that define places; how they join together to create a whole; and how varied features define the West End's personality, its metabolism, its challenges and its opportunities.

The purpose of understanding places at such a level of detail is to make clear, informed, principle-led proposals for sites, streets, spaces, parks, traffic, pedestrianisation, cycling, new buildings and infrastructure. For the West End's unique mixed character to weather the cycles of development, remaking and rebuilding, we must harness the qualities which create its vibrancy – its buzz, its character, and its grit.

Virginia Woolf once described the West End as a "*golden tassel on the edge of London's vast black cloak*".[1] But today's West End is not just

an ornament *to* or playground *for* London: it is an economic powerhouse[2] inseparable from the fabric of the city. Its value – civic, cultural and economic – lies in its complexity and centrality, and in countless interwoven layers of histories, activities, hidden corners, spaces, places, routes, and thoroughfares. A typical West End block is complex: it might house specialist suppliers and local shops, pubs, contemporary high-spec office space, small creative industries, luxury flats, social housing, an ancient church, fashionable restaurants, or even a theatre or museum.

The district's character changes from building to building, from street to street, through the seasons, throughout the day and evening. These multi-layered functions – and the absence of a simple on-by-day/off-by-night condition as seen in other cities and districts – create a richness that attracts a mix of people from many walks of life.

However, this precious ecosystem is set within the context of the default London condition – change. The West End is under pressure from the rapid growth in the capital's population, increased numbers of international visitors, and the changing retail, leisure and commercial sectors with the demands they make on building stock and infrastructure. All of this comes together and is played out in our public realm, which has to accommodate movement, shopping, commuting, servicing, socialising, pageantry, celebration, and moments of calm.

We[3] have developed a series of recommendations, originally written for Cllr Robert Davis (Westminster City Council Deputy Leader and Cabinet Member for the Built Environment), which consider how improvements and developments in the public realm can protect the West End's character, help enhance its prosperity, and enrich its civic life.[4]

Reveal and celebrate the unique urban fabric of the West End

The built heritage of the West End is exceptional, an inheritance of high-quality architecture and urban design: it includes straight Roman roads, medieval lanes, churchyards, axial routes, vistas, and garden squares. Yet in many cases the logic and sequence of these spaces has been compromised by unsympathetic traffic planning, along with the insensitive placement of street furniture and a lack of care for the three-dimensional experience of the street.

Dean Street: entrances, businesses and dwellings

Dean Street: entrances, businesses and dwellings. Soho Public Realm Study, Westminster City Council and Transport for London, 2014. Image reproduced with thanks to Publica.

Opportunities exist to reveal the underlying urban grain of the West End and its logic, in order to highlight certain buildings and to reconnect important spaces. Planting, lighting, pavement improvements and de-cluttering could be used to enhance the links between the West End's garden squares and encourage pedestrians to use quieter alternative routes to the West End's most congested streets.

Improve the material quality of streets and maintain their rhythm of frontages

In recent years there has been an increasing emphasis on improving London's streets. Westminster's policy states that public realm upgrades need to maintain high standards, and that the hierarchy of streets, spaces and world-famous locations must be respected and given their own tailored solutions and designs.[5] The way people move through the West End – often using the network of side streets and passageways as well as main thoroughfares – means that all spaces are important and need attention.

Street improvements need to go hand-in-hand with a considered approach to building frontages. New developments often include continuous ground floor glazing at street level, on the assumption that transparent street frontage engenders life, character, occupation and an 'active' frontage.

However, West End streets are defined by the interplay of intensively used and curated 'active' frontages and entrances, more closed 'passive' frontages, and those which are purposefully blank. Retail facades are broken down into frames designed to draw the eye to the scale of merchandise on show, and stage doors give moments of drama within large expanses of handsome brick at the rear of theatres. The design of any large new developments should be informed by these principles of framing, variation and street rhythm.

Encourage custodianship and care by landowners, stakeholders and occupiers

The West End is blessed with enlightened local government leadership and custodians. Much of the survival of the West End's urban form and character is thanks to the achievements of grassroots organisations over many years, such as the Soho Society & Neighbourhood Forum,

the Seven Dials Trust, the Covent Garden Area Trust and the Covent Garden Community Association.[6]

In some cases whole streets and districts are under the long-term custodianship of London's Great Estates.[7] The successes already achieved – for example by Howard de Walden in Marylebone[8] and Grosvenor at Mount Street[9] – show the potential of coherent thinking around mixed-use offers, material improvements, greenery, lighting, wayfinding and public art in the West End. Local BIDs[10] provide a vehicle to implement change across more fragmented ownerships and business interests, with remits extending to issues such as consolidated servicing and recycling.

This culture of residents, tenants, landowners and local government working in close collaboration should be valued and developed more, in order to bring about strategic change and innovation across the West End that balances varied interests.

Provide new and improved amenity spaces that are truly public and family-friendly

The West End is punctuated by garden squares and bordered by Royal Parks. Yet the majority of visitors experience a hard, built-up environment dominated by transport, traffic and movement. There is a dearth of places to sit, relax, eat or play, as well as a lack of informal space for innovation and new creation.

Connections to the Royal Parks need to be improved, and more should be made of existing green spaces and areas not needed for major pedestrian or vehicle flows. New pocket parks and greenery can act as buffers to the pollution and noise along busy streets, or make the most of dead ends and back spaces for use by the public. Tree planting, play and seating opportunities should be built into the public realm as much as possible, especially around the major shopping streets and cultural destinations.

The use of these spaces by the public should not be dependent on spending money in order to sit down or eat at a table. The provision of calmer break-out spaces would help to improve the experience of a day out in the West End, making it more attractive for families with younger children and all age groups.

Address the dominance of vehicles over pedestrians and cyclists

Cycling and walking are being promoted through initiatives such as the Mayor of London's commitment to dramatically improve air quality,[11] and other drives to encourage healthy and active lifestyles, liveable neighbourhoods, car-free developments, and vastly improved walking and cycling routes. Westminster City Council has recently launched a draft Walking Strategy.[12] But heavy traffic, especially buses, dominates the public realm, inhibiting pedestrian movement and obscuring views and connections within the historic built environment.

Significant changes are underway to redress the balance between vehicles, cyclists and pedestrians. Northbank BID's public realm vision[13] proposes the removal of the infamous traffic-dominated Aldwych gyratory system as part of a wider plan to create a public realm setting for new connections between the local educational and cultural institutions, an appreciation of the remarkable architecture in the area, and a celebration of its civic life.

The Baker Street Two-Way Project[14] aims to reduce the dominance of traffic along Baker Street and Gloucester Place that currently divides the area. The arrival of the new Crossrail Station at Tottenham Court Road will see the existing one-way system replaced with two-way working, tree-lined streets, protected cycle lanes and new public space.[15]

West End bus routes are being rethought[16] in anticipation of Crossrail and the associated changes in public transport use. At Hanover Square, Crossrail's arrival in 2018 has catalysed plans to pedestrianise one side of the square and recast the historic townscape and gardens with high-quality materials, new lighting, planting and play features. The Mayor has also pledged to pedestrianise Oxford Street[17] by 2020: however that is achieved, it is certain to radically alter the balance of use on this pre-eminent retail street and historic thoroughfare.

There is clear potential to create better cycling conditions in the West End through improved traffic management, segregated cycle routes where appropriate, and coordinated thinking about back streets, contraflows and small design moves. This is underway in places as part of the ongoing construction of ambitious new cycling infrastructure across London, thanks to a raft of policy changes under successive London mayors.[19]

More thought should be given to the experimental and temporary closure of streets – to gain an understanding of the potential benefits or pitfalls, and to build public consensus on the right way forward for the West End. Cities such as Milan, São Paulo and Bogotá have successful precedents for this, where seemingly intractable problems of traffic congestion and pollution have been tackled head-on through specific public-focused events when selected streets or districts have been closed to traffic.

This does also happen in London: we might recall the successful traffic management during the 2012 Olympics, local neighbourhood events, and even the particular days when Regent Street and Oxford Street are closed to traffic. We need innovative thinking about traffic management to achieve an optimum balance between functionality, public health, business and civic life.

Embrace programming and seasonal changes in the public realm

The West End changes throughout the day and throughout the year. The seasons offer new reasons to visit or stay in the district. They are also a natural actor on our senses. Urban environments should do more to reveal and celebrate this. Street management and public realm design could allow for the built fabric to be activated in varied ways at particular times of the week and the year.

The West End should capitalise on the way its important spaces change throughout each day. The arrival of the Night Tube represents another step for London towards becoming a 24-hour city like Berlin or New York, and is an opportunity to think both imaginatively and practically about evening and night-time uses in the West End.

This should be spearheaded by the arrival of the 'Night Czar', soon to be appointed by the Mayor of London, tasked with reimagining and championing London's night-time economy. Well-considered evening activity in the West End will build on the number of events already making use of the capital's streets and spaces by night, such as Art Night or Lumiere London.

Entertainment and culture are not the only opportunities. People live in the West End, and their needs will have to be carefully considered in any reinvention of the district's use after dark. The Night Tube will

mean that residents, workers and those visiting the West End will be able to travel more easily at all hours and so access the district and other areas of London more quickly and cheaply. The West End is likely to be increasingly in use 24 hours a day. We need to think about the challenges and opportunities this brings.

Moving forward

London, as a growing global city, needs the joined-up urban design and practice that civic urbanism can provide. Considering the public realm, new buildings, infrastructure, management and use through this lens can improve the outcomes for local residents, workers, visitors, businesses, and investors – young and old.

Development decisions should be reached through consensus built on specific evidence and a shared vision. Objectives, roles and responsibilities should be clearly articulated, communicated, championed, defended and funded. This will ensure the intrinsic merits of the West End's complexity and civic identity are not eroded, but rather understood, strengthened and delivered in every policy and project.

How do we move forward? How can we – planners, designers, retailers, developers, politicians and citizens – shape the West End's successful, livable, sustainable future? How can we harness the energy needed to enable the district to face the pressures of London's accelerated growth, whilst continuing to thrive and accommodate mix?

The West End already has a vision, strong leadership, strategic decision-making capability, knowledge about where to seek investment, and an understanding of how to prioritise key projects. Westminster City Council's Spatial Strategy objectives[20] already enshrine many of the principles of civic urbanism in the protection and enhancement of a walkable, workable, beautiful city.

Cllr Robert Davis is championing the West End's character, functions, uses, and public realm. Any refreshed vision for the heart of this great world city should be informed and underpinned by these ideals. We can afford to be confident, ambitious and decisive, as we are able to act with meaningful resources and investment.

The challenge is to ensure that we make the right decisions, keep talking across disciplines, continue listening to varied positions, and

ensure that specific proposals, changes, and innovations are informed by a thorough understanding of the qualities and conditions that make the West End what it is. By offering a forensic survey and analysis of the area – neighbourhood by neighbourhood, street by street – civic urbanism can provide the knowledge, understanding and evidence base to make informed, intelligent proposals. By championing civic identity, beauty and the intrinsic character of the West End, we can ensure that innovation and change enhance the area now and for generations to come.

Endnotes

1. Woolf, Virginia (1915). *The Voyage Out*. Chapter One. London: Duckworth.
2. The New West End Company credits the West End with making an £8.8bn annual contribution to UK GDP.
3. Publica is a leading civic urban design consultancy specialising in strategies and proposals for neighbourhoods, public spaces and masterplanning. Publica has worked extensively in the West End, with projects at Hanover Square, Bond Street, Covent Garden and Soho, among others. Find out more at www.publica.co.uk
4. Prior to the establishment of the West End Partnership (see the essay in this collection by John Dickie) in 2015, the West End Commission (an independent body set up by Westminster City Council in 2012) called for evidence, for which Publica submitted a range of recommendations for improving the West End and securing its future.
5. City of Westminster. Retrieved 16 September 2016, from: www.westminster.gov.uk/urban-design-public-realm-and-public-art
6. For more about West End amenity societies, community groups and trusts, see http://e-voice.org.uk/westend/about-us/
7. The West End Great Estates include Grosvenor Britain & Ireland, The Portman Estate, The Crown Estate and The Howard de Walden Estate, alongside major developers and landowners such as GPE, Derwent London, Stanhope and others.
8. The Howard de Walden Estate has been credited for its far-sighted approach to building the unique character of Marylebone. It has made strategic decisions to ensure a balance between residential, medical, and office sectors, safeguarding longstanding local assets while also bringing in new retailers and uses. See www.hdwe.co.uk/about-us.aspx

9. In 2010 Grosvenor completed an ambitious public realm project alongside building redevelopments at Mount Street. See www.grosvenor.com/featured-locations-and-properties/asset/mount-street
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Surf and turf – the future of retail

Eva Pascoe

The world of technology hit London's West End in September 1994 when, for the first time, people could walk into a café, pick up their email and 'surf the net' for only £2.50 per hour.

The physical and virtual worlds have been converging ever since, and purchases of physical goods have increasingly migrated to virtual shops. This has led to a rapid shift in the allocation of high-street space – from fashion and homeware stores to coffee shops, restaurants, gyms and beauty salons – everything that you actually need to bring your body to use.

The West End is not immune to this shift. Its shopping districts have already changed to meet the challenges, and will need to continue changing to avoid becoming retail dinosaurs in a technological world. Technology also offers many opportunities to those who can take advantage of them, both for customer delivery and in making the most of precious real-world space – something that planners are also going to have to adopt.

The changing face of retail

Although macro trends bode well for the West End, the counter trend is that fashion stores and footwear have the most to worry about from the internet. The age group most likely to come to work in the West End – as more companies follow Facebook and open downtown HQs – will be 25–35s, closely followed by 18–24s (due to university expansion in the area). These two age groups are native online shoppers.

There are some signs that a high-end reputation and an innovative approach to digital luxury offer protection from online threats. 'New luxury' means combining and streamlining on- and offline channels.

The execution of this strategy will make or break the famous West End stores, as Click and Collect is forecast to account for over 40 per cent of luxury fashion sales by 2017.

Selfridges has invested over £300m on its Oxford Street flagship, creating a luxury service and making its Click and Collect foyer more glamorous than the entrance to Claridge's. Selfridges's app is top-notch, and its stock management, which underpins the service, is as high-definition as its amazing TVs. If something doesn't fit, it's no problem: a replacement will be brought from the appropriate floor in no time. Profits are up and the transition to digital luxury is on the way.

Another model is Nike's flagship, which landed at Oxford Circus in 1999. Its shop-as-marketing-tool-never-mind-the-density concept blew all our provincial retail minds away. Not concerned about profits, Nike's idea for a store was just to amaze the customers – a precursor of the immersive shop-as-media experience that Apple has since perfected.

To counter the channel shift for physical goods, Nike is aiming to reach the inner designer within all of us. Their DIY sneaker design station is proving a strong driver for young sneakeristas, who will brave Saturday crowds for the opportunity to make their own pair just a fraction different.

The space is attractive but it is also the range that matters – Nike Oxford Street is the biggest European store selling Nike's full range and attracts tourists from Moscow to Lisbon. Customers can get complete gait analysis and personal recommendations based on individual running style, adding extra reasons to visit in person rather than click.

With online competition closing in on fashion as a whole, there is no room for shoddy service, less than super-knowledgeable sales assistants, or poor Click and Collect facilities. Great service means retaining well-trained staff, but alas, West End stores have about 110 per cent staff turnover per year on average.

Not so for John Lewis, where the cooperative structure of the organisation ensures well-above-average sales staff retention and, as a result, well-above-average sales results. No need for zero-hours contracts here: customers are prepared to pay a small premium for great service. Other brands need to pay attention in order to improve their West End service levels, which can be haphazard to say the least.

En route to peak tourism?

Overall tourist numbers in London increased by 26 per cent over the last five years, to over 18 million international leisure tourists per year.[1] Their spending power is down, however, following an oil-price collapse that left the Russian oligarchs, middle-eastern Sheiks and Nigerian oil-princes out of pocket, and forcing luxury retail to shift its offer to a more middle-class price range. Only luxury cosmetics and food and drink have grown in volume, while luxury fashion and leather goods remain flat, reflecting higher volume but lower price due to less-affluent tourism.

Since 24th June, the added attraction of a low pound post-Brexit brings a new challenge to bricks-and-mortar outlets in the shape of new, less-affluent Asian and European tourists, who are not big spenders but still love a lipstick from Selfridges or a scarf from Liberty. They need to be made welcome and looked after like the previous luxury-hunting oil-ocracy, with more affordable hotels in the West End and mid-market shops to offer special (but not wallet-busting) cosmetics and service offers.

If this effect continues, shops will need to rethink their layouts to accommodate higher numbers of lower spenders. There are now many more 'mid-wealth' tourists than there were luxury-hunters, and the cosmetics floors at Selfridges and John Lewis already feel very cramped.

A new catalyst for increase in West End visitors is the Night Tube, used by 50,000 people on its first night on only the Jubilee and Central lines. It should bring £320m in new revenues to the West End over the next 20 years, increasing the number of jobs by about 2,000. It will also cut down evening traffic and pollution as people will not need to use their own cars.

The winners should be late coffee bars like Bar Italia in Soho, which, according to Google's 'popular times' bar chart, is the only café in town where the peak traffic is at 2am on Saturday. The only problem is that there is only one Bar Italia so far … night-life lovers will need to bluff their way into private members' clubs if in need of a late hideout.

Sadly, 15 London clubs have closed down in the last two years[2] due to licensing problems, so it is not entirely clear where revellers are likely to go. At the time of writing, the number of licensed all-night venues in central London is lower than ever. Foursquare's new

venue-recommendation bot (called 'Marsbot') may help, but it will have a shockingly limited range of geo-suggestions to propose for a night crawl. Like 24-hour Tokyo, London's West End will need many more all-night bars, 24/7 gyms and collaborative work places. Planners must get creative, or we will be all dressed up with nowhere to go after midnight.

Commercial challenges

The commercial market has bounced back from a peak of 9.2 per cent vacancies in 2009 (post-Lehman crisis) to 5.2 per cent in 2011 – and heading to less than 4.5 per cent today. Russian and Asian landlords seeking a safe haven have shown interest and now account for nearly 30 per cent of ownership.[3] By comparison, less than 5 per cent of Tokyo and only 15 per cent of Paris are owned by foreign nationals.

As the pound weakens, there will be increasing demand from Asian investors, eager to buy a piece of heritage Britain. But despite new money pouring in, new space is forecast to increase by less than 1 per cent by the end of 2016,[4] mainly due to outdated planning restrictions. The rest of the market's activity is mainly driving an increase in prices, and therefore indirectly blocking innovation by making pop-ups and flexible collaboration spaces hard to find.

In terms of price, West End retail space is second in the world only to Manhattan. The only way young retail brands can get a presence in today's West End is via tiny pop-ups in larger stores such as Topshop or Debenhams. There is no middle ground between an in-store mini-pop-up and a fully fledged flagship, due to a severe shortage of entry-level properties where young retailers can try innovative formats.

Large landlords are known to be highly risk-averse. If we want to keep future West End retail fresh and innovative, we need to address the record high rents, the impending upwards business rates review, the out-of-date planning policies, and the total lack of short-term leases. These are collectively creating boulder-sized stumbling blocks to the entry of new retail blood.

Managing density with technology

A significant upgrade of transport capacity is coming to the West End, with Crossrail beginning to call at Tottenham Court Road and Bond

Street from 2018. It is expected that this will double the West End's working population. With an increase in office workers, shoppers and tourists as a result of Crossrail and other travel trends, we need to manage available space in micro-units of time and rent-space. At the moment, footfall is measured by cameras, based on small samples and useful only as a broad guideline.

New measurement technology is emerging – from iBeacons to WiFi-based tracking of footfall – that offers a much better approximation in real time (and real space) of what happens outside each store, gym and office. The Local Data Company, in conjunction with University College London, is starting a pilot with an hour-by-hour, blow-by-blow data feed showing exactly how much traffic passes by each location.[5]

Additional research from Guy Lansley at University College London shows that it is possible to model an e-catchment area using metadata from Twitter (or, in future, Facebook, Instagram or Snapchat) to establish how many people in a given office block are using a specific store. It will help to calculate, for example, a gym chain's optimal locations in the area; or whether lunch pop-ups in flexible locations may be useful. And – despite its limitations of being skewed to more affluent and educated users – Twitter's users could be a good proxy for the West End, as office workers in the area follow similar social network demographics.

With such analysis, we can begin to understand how high streets are used, how they are changing, and what drives footfall patterns in real time. It also offers the opportunity to unlock low-use time in retail and office space.

A company called Seat2Meet.com – a recent arrival in London from Holland – seeks to capitalise on the greater availability of information about usage in the West End. Already managing about 80,000 seats in locations across Europe, the company is helping restaurants to make use of their off-peak time by renting tables to business people who don't need a full-day desk, but just a meeting table for a couple of hours.

With real-time information about availability of space, a growing army of young retail brands could take advantage of short-availability slots – perhaps in theatre foyers or hotel meeting rooms. Internet of Things-enabled micro-slot management will be the future of West End retail.

Meeting the future with innovation

Planners also need to become more responsive and recognise the pressures on space from expected future arrivals. Lego-like modules, as created by the likes of Apex Airspace Developments, can be added to flat roofs in the West End to create flexible spaces for a few years. This allows occupants and landlords to test the waters, while supporting new retail formats and innovation in collaborative spaces. Gym on the top floor with rooftop views? Craft gin bar in the attic? All-night tattoo parlour above the offices? All and more will be needed to move the West End on so that it meets the needs of 24/7 millennials and their globalised business models.

Innovation is all about flexibility. But for start-ups, it is also about face-to-face meetings, suppliers coming into contact with potential business clients, the vibrancy and diversity of the West End supporting the wave of de-corporatisation, and the adjustment of thousands of professionals at the peak of their powers. The future may be beautiful, but it will be small, with agile and lean SMEs forming and re-forming in response to market needs. It will need flexible office space and low-cost retail pop-up spaces to thrive.

Tax incentives, alongside more flexible planning policies, can open up an agreed percentage of flexible, low-cost spaces for young innovators and collaborators. Once established, SMEs that succeed under Darwinian market pressures should be encouraged to continue in the West End. They will need office formats to suit the second and third phases of maturing companies – perhaps designated extra new-build floors on top of collab-rich buildings, which support an ecosystem of growing companies at every stage.

The only way for the West End is up. But it will take a lot more than wishful thinking to leverage the Night Tube and Crossrail investments, support new retail and office-space innovation, and remove pollution. Mayor Sadiq Khan is looking for a 'Night Tsar' to pull together businesses, councils, transport and policing for London's 24-hour economy. I think a 'West End Tsar' – who can dedicate undivided attention to making the area work for Londoners and tourists alike – should be next on his list.

Endnotes

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Policing the neighbourhood – public safety in a global district

Rick Muir and Liz Crowhurst

What can be done to improve public safety in the West End? How should the police and others go about their work in one of the most globally networked places on Earth? In an age where access to global economic, cultural and social networks is the key to prosperity, the West End is one of the most prosperous centres of population in the world.

However, mobility and affluence create particular challenges for public safety. Thriving night-life, frequent high-profile public events and large numbers of affluent visitors make the West End a focal point for acquisitive crime, alcohol-related anti-social behaviour, and potentially even terrorist attacks. Combine this with a resident population unlike any other in the country, and it is clear that a highly tailored approach is needed.

The policing and security challenges in the West End

London is one of the most successful – and safest – cities in the world. Despite growing international terror threats, and the expectation that an attack is highly likely, it is worth noting that at the time of writing London has not seen a mass-casualty terrorist incident in over a decade. In 2014 it recorded 18.7 million tourist visitors (up 8 per cent from the previous year), with 56 per cent of these travelling from overseas.[1]

Due in part to these successes, both visitor and resident perceptions remain positive. Research in 2013 found that around 90 per cent of visitors rated their experience at West End events as 'good' or 'very good'[2] and, within those Westminster wards found in the West End area, 99 per cent of people said they felt safe in the place where they lived.[3]

Public safety is not only an important good in and of itself: it is also a basis for the West End's prosperity. Any sense that the area is 'unsafe' or 'risky' may deter potential visitors. In 2014, the UAE government warned its citizens to avoid Oxford Street, Piccadilly and Soho in response to several violent attacks on Emiratis. And in 2015, London ranked 18th in *The Economist*'s Safe Cities Index – below New York, Melbourne, Hong Kong and Barcelona.

In the context of a UK exit from the European Union, which has the potential to make travelling to London more difficult than travelling to other European cities, providing an attractive and safe environment for tourists is an even greater priority in benefiting the wider economy.

There are a number of specific challenges to public safety in the West End. First, it has a comparatively high incidence of crime: in the year to September 2015, Westminster[4] recorded an average of 22 crimes per 100 residents, compared to just nine per 100 across the capital as a whole. Much of this is explained by relatively high levels of acquisitive crime, such as snatch thefts and pickpocketing, of which there were 12.6 incidents per 100 households compared to 3.6 per 100 across London as a whole.[5]

Second, alcohol-fuelled crime and disorder is an ongoing issue in an area with a burgeoning night-time economy. There are over 3,000 premises licensed to sell alcohol across the West End, and around 225,000 people pass through Leicester Square on a Saturday night alone.[6] It's unsurprising that the consumption of alcohol underpins a number of safety issues in the area.

The likelihood of criminal acts or anti-social behaviour being connected to alcohol use rises as the day progresses. Recent national figures show that while 23 per cent of violent incidents that occur between noon and 6pm are alcohol-related, this figure rises to 52 per cent between 6pm and 10pm, and 83 per cent between 10pm and midnight.[7] This is particularly problematic for the West End, where a higher-than-average number of venues are open late in the evening and into the early hours of the morning.

Alcohol-fuelled crime and disorder has both immediate and long-term consequences for those overseeing the streets of the West End. Violent incidents not only require police attendance at the scene: they

can also result in other emergency services being called (there were over 5,000 ambulance attendances across Westminster in the year to September 2015 for alcohol-related incidents), and in overcrowded custody suites full of people arrested for drunken behaviour.[8]

As a consequence, officers may be removed from their patrols to supervise offenders until a cell becomes available – often many hours later. In an era of constrained budgets, squandering resources like this is not only inefficient; it also has the potential to affect the ability of agencies to keep the public safe.

Third, the large number of public events taking place each year places significant demands on the police and other local agencies.[9] Annual occasions such as Trooping the Colour, the London Marathon and London Pride, for example, place a strain on resources due to the sheer volume of people in attendance. Much of the challenge here is in ensuring the smooth flow of crowds along London's streets onto the public transport network, or reducing anti-social behaviour, rather than fighting crime.

These major events also come with a substantial price tag. In financial year 2010/11, for example, the Metropolitan Police Service estimated that the state opening of Parliament alone had a total policing cost of nearly £500,000, while the Festival of Remembrance and Remembrance Sunday Celebrations totaled £607,000.

This substantial source of demand for warranted officers to provide crowd control and event stewardship has a significant impact on the effective deployment of police resources in the West End. It also calls into question whether the contribution of other agencies, including local businesses that benefit from such occasions, is sufficient – particularly in an environment of constrained finances.[10]

Finally, policing everywhere is having to deal with a rising set of challenges linked to vulnerability and, in particular, individuals with overlapping and complex needs. Such people come into contact with a range of different services and, all too often, a failure to take an integrated approach to their problems means that they end up getting into trouble with the police.

In the West End there is a major issue around the levels of rough sleeping. Compared with a wider London average of 0.27 (per 1,000

inhabitants), Westminster has a rough sleeping rate of 2.38. This level of street homelessness is unmatched anywhere across England and Wales.[11]

A tailored response to transience

A globalised district with a transient population requires a different approach to public safety than more stable and predominantly residential neighbourhoods.

Where communities work together in order to reduce crime and disorder, greater communication and collaboration between the public, local leaders and frontline officials can build more responsive neighbourhoods. In the West End, however, which hosts a much more diverse and transient community, these key drivers of public safety are often absent. In the borough of Westminster, a significant number of those present on a day-to-day basis are only there briefly – most notably the millions of tourists who visit fleetingly for leisure.

When we also consider that 16 per cent of homeowners in the area have a second home elsewhere, and a further 1 per cent of properties are either long-term empty or vacant – a figure much higher than the national or even city average – it becomes clear that seeking to strengthen social bonds is unlikely to be a plausible or effective crime reduction strategy.

The socio-demographic of the area, combined with the high volumes of low-level crime, means that agencies must employ alternative approaches to improve public safety. Rather than rely on social interventions, the West End has traditionally seen greater use of situational crime-prevention techniques – most notably restrictions on the number and density of premises licensed to serve alcohol – coupled with greater police visibility and attempts to harden potential targets through greater awareness of the ways in which criminals operate. This combination aims to both reduce the opportunity for offending and increase the risk of detection.

Evidence suggests that in neighbourhoods where a high number of outlets are licensed to sell alcohol, more violent assaults occur. In Cardiff, for example, serious violence in the city's entertainment districts was directly proportional to the density of licensed premises.[12] While this may in part be due to the higher volumes of individuals in these areas,

limiting the provision of alcohol is likely to be an important part of reducing crime in the West End – although to date no robust evaluations have been able to demonstrate the success of this strategy.

Future opportunities and threats

Looking ahead, the West End seems set to become even busier. The Night Tube is rolling into action across a number of lines – all of which will cross the West End – and by 2018, Crossrail will mean that residents outside London have quicker and easier access to the capital's leisure and business districts.

With these changes, the risks to public safety also change. While the Night Tube will drive higher footfall within the streets of the West End, to the benefit of local businesses, it will also create an opportunity for people to arrive much later. To date there has been a natural 'exodus' of some parts of the West End at the time of the last tube, but with the new extended hours a much higher volume of people are likely to remain for much longer.

Planning for an additional level of police presence over an increased number of hours will be an essential step to ensure that the benefits of connectivity don't outweigh the potential for increased crime. One potential mechanism for this may be through the adoption of the Late Night Levy in the West End. Since 2011, it has been at licensing authorities' discretion to place a charge on businesses that are licensed to sell alcohol between midnight and 6am. This has already been rolled out in the borough of Islington.

By introducing contributions from those involved in the night-time economy it may be possible to prevent a further burden being placed on scarce public resources, while still allowing the area to thrive. Given their financial impact, it may also be desirable to introduce charges for some public events: even if this is only nominal, the numbers in attendance may mean the overall funds raised are substantial.

Given the particularities of policing such a transient district, the biggest opportunity for enhancing public safety in the West End lies with technology. The introduction of tablet computers for frontline officers has the ability to keep them out on the street for longer, and fresh insights gleaned through greater use of sensors, drones and predictive

analytics have the potential to make fighting crime and ensuring safety more efficient as policing faces changing demands.

New technologies also have the power to fundamentally change the ways the police interact with citizens. Apps can allow victims to report crimes, facilitate the payment of fines, and provide people with relevant information about additional support services.

These capabilities also allow the police and other agencies to communicate with visitors to London both before and after their visit, which can play a critical role in boosting people's confidence in the West End's safety. Many of these techniques are already being utilised in Dubai, a city that is at the forefront of new technology-powered ways of working.[13]

Whilst the West End's hyper-connected and highly mobile population poses its own particular challenges to public safety, new technologies – combined with existing targeted situational crime interventions – have the potential not only to keep people safe, but also to help the area thrive. As always, there will be further challenges to overcome. Yet, with the correct approach, the West End can help to drive greater prosperity across London and provide a blueprint for crime prevention in other globalised districts – both within the UK and internationally. This is a prize worth striving for.

Endnotes

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Freedom pass – funding and finance

Alexandra Jones

The West End is one of the best-known city centres in the world. Renowned for its tourist attractions, retail, and cultural offer, its internationally competitive businesses are in sectors from advertising to finance, medicine to fine art. The area generates more taxes for the Exchequer than any other comparable area in the UK.

Yet, despite its prosperity and international prominence, the West End – like most areas in England – has very limited control over its tax base and funding regime, and this is becoming an increasing constraint on future growth.

It's easy to take the prosperity of an area like the West End for granted. Yet success is taking its toll: many businesses are struggling with issues such as lack of new offices to expand into, high rents, an increasingly dilapidated public realm, and workers being unable to afford to live nearby due to the high cost of housing.

Councils and the GLA have responsibility over many of these issues but they are struggling to tackle them. One of the reasons is lack of control over funding and finance, which makes it harder for the West End to manage these risks to future growth through investment – either directly in public sector projects, or in partnership with the private sector where public money provides a catalyst.

Given the taxes the West End generates and the jobs it helps support, there are significant implications if the area does not achieve its growth potential – not only for London, but also for the rest of the UK. A recent report by my organisation, Centre for Cities, found that the UK relies on London for £3 in every £10 of taxes generated by economic growth.[1]

This matters even more at a time of greater economic uncertainty, following the vote to exit the European Union. If the UK is to make

the most of the West End's potential to support economic growth and employment, there is a need to look again at funding, finances and taxes.

The West End's economy

Any discussion about the West End's finances needs to start with a look at the West End's economy and why funding matters. The West End covers a small part of central London, yet it generates 3 per cent of the UK's economic output – more than any other comparable part of the UK – and £17bn of taxes per annum, including 8 per cent of all business rates (National Non Domestic Rates or NNDR).

It hosts 120,000 businesses and around 650,000 jobs, two-thirds of which are filled by people living in other parts of London.

Why funding matters to economic growth in the West End

This highly prosperous economy is, however, facing challenges – partly because of its success. Congestion is high, streets are overcrowded and infrastructure is increasingly inadequate for the volume of commuters and visitors. Air quality is poor and the public realm is patchy; hardly a match for the area's beautiful architecture.

Low levels of office development, despite high demand, also mean there is a shortage of space (office vacancy rates are below 2.6 per cent). As a result, rents are high, with an impact on some of the independent small businesses and start-ups so important to the area's prosperity and attractiveness.

National government has worked with London government and businesses to co-fund major projects like the Elizabeth line (Crossrail 1), and there are various smaller-scale projects, such as investment in Regent Street by the Crown Estate and the pedestrianisation of streets around St Christopher's Place.

However, the West End still faces significant challenges – investing in improved transport and making the most of transport hubs; building more and affordable homes; and improving utilities. The public sector is often best placed to pull together private and public sector sources of funding to tackle these issues – many of which are devolved responsibilities – but the current local funding and finance regime does not support this.

Tax and funding regime for the West End

The local government funding system in England is highly centralised. This leaves London underpowered relative to other global capital cities.

Even after some welcome reforms in 2013, which allowed councils to retain 50 per cent of local business rates (albeit with policies in place to redistribute funds between councils), barely 7 per cent of all tax paid by London residents and businesses is kept by the Mayor and boroughs. In New York the equivalent figure is over 50 per cent.[2]

While international peers can more rapidly build metro systems, enhance education facilities and develop new homes to boost economic success and quality of life, London and its boroughs are reliant on a small and narrow set of local funding levers.

They have little flexibility and few financial incentives with which to fund projects to boost economic growth, and instead must compete with other areas of the country for limited central government largesse.

Particular challenges of the current funding regime include:

High reliance on (shrinking) central government grants, including ring-fenced grants for education, together with limits on the autonomy of West End councils and their ability to invest in growth.

London is more reliant on central government transfers – and therefore more sensitive to public funding reductions – than global peers: grants account for 74 per cent of revenue for London councils, compared to 31 per cent in New York, 18 per cent in Paris and 8 per cent in Tokyo.

Restrictions on how much local authorities can raise from council tax in response to need for services or investment. Council tax is a "localised" tax – accounting for, on average, 18 per cent of local funding – but if councils wish to increase council tax by more than 2 per cent – or, from 2016–17, 4 per cent for those with social care responsibilities – councils need to hold a referendum to get approval from local voters.

This means many local authorities (including Camden in 2016–17) are increasing council tax by 3.99 per cent to avoid triggering a referendum, even if this increase does not necessarily match what is needed to fund services or invest in growth.

The complex, centralised business rates system does not always benefit the fastest-growing authorities. Under the current system, in operation since 2014, local authorities retain 50 per cent of rates generated by local businesses (albeit within a complex redistributive system) and the remainder is redistributed as grants, via the Treasury.

In London, of the 50 per cent of business rates revenue kept by local authorities, 40 per cent goes to the Greater London Authority (GLA) – funding more than three-quarters of the GLA's revenue expenditure, as well as contributing towards Transport for London and London Fire Brigade budgets. The GLA also has the power to levy a precept on council tax raised in Greater London, and a supplementary business rate (which funded Crossrail and raised £220m in 2015–16).[3] The Mayor will soon be able to levy an additional 2 per cent on business rates to fund further infrastructure projects.

From 2017–18, 100 per cent of business rates in London – and within it the West End – will be devolved to local government, which will replace the current formula grant funding system.

This should give councils greater control over their finances, but the results will depend on how well the system balances vital redistribution from the wealthiest to the poorest with sufficiently strong incentives for councils to support growth and businesses through investment in transport, the public realm, skills, and so on.

Limitations on setting local sales, fees and charges can reduce services delivered. These charges include parking fees and payments for publicly provided amenities like local swimming pools – and account for 10 per cent of local income on average. Unlike international peers, however, UK councils are limited in setting rates and introducing new levies, as well as by regulation.

This can limit authorities' ability to raise revenue even if this benefits those paying the fees. For example, in 2013 a sex shop chain in Soho won a court case against Westminster City Council over license fees, because they were set at a higher level than the cost of the licensing process.[4] Westminster argued (unsuccessfully) that higher fees funded enforcement work preventing illegal shops – lower licence fees would mean this work needed to be funded from elsewhere or cut.

The impact of the Community Infrastructure Levy schedule is still unknown. Levied on new residential – not commercial – developments, the expenditure of funds raised is limited to the provision, improvement, replacement, operation or maintenance of infrastructure that is needed as a result of development or new growth, with neighbourhood fora determining how much is paid.

However, it is not yet clear how developers view this new charge (made typically in addition to section 106 payments), what impact it may have on developments, or whether there could be opportunities to incentivise commercial developers to support new housing.

Caps on borrowing further restrict financing options. Local authorities are able to borrow money prudentially and do so, with the Public Works Loans Board usually offering the cheapest borrowing rates.

However, there are restrictions on how much local areas are allowed to borrow, with the amount an individual council is able to borrow usually limited to £500,000 in any one year, a negligible amount for an area with the investment needs of the West End.[5] These challenges mean councils have limited flexibility over how they raise, spend and borrow money.

A new tax and funding regime for the West End

There are big potential prizes to be gained from giving greater financial and fiscal control to the West End and London. If London voters and politicians prioritised long-term investment in the infrastructure they rely on day-to-day, this could unlock economic growth and productivity, and creates opportunities for more people to access jobs.

This in turn generates higher tax yields that can be part-reinvested in the West End and London's physical and social infrastructure, as well as generating funds to support investment across other areas such as the North and Midlands. To make this happen, government should:

1. Give London and the West End the ability to reinvest some of the West End's business rates to kick-start infrastructure projects, within an overall GLA business rates retention system

This could have a quick impact: the West End Partnership, a private-public partnership (for which I chair the Prosperity Group), is committed

to transforming the West End by co-financing and supporting a £814m programme of work, but has identified a need for £409m to get key projects started.

A small increase in retention of Westminster City Council's business rates, from 4 per cent to 6.5 per cent, would enable Westminster – within a GLA system – to borrow in order to finance the programme at around £40m per year. The West End estimates benefits of around £12bn in additional GVA and around £3.8bn in additional taxes, as well as more space for small businesses, more jobs, better air quality and safer streets.

The City of London already has a similar provision to keep some of its business rate income, albeit a lower amount.

2. Reform business rates and devolve other property taxes to London and other major cities

This autumn's review of the business rates system should introduce more frequent valuations to keep rates in step with the local economy. West End rates are currently based on April 2008 rental values: they are likely to go up significantly following the 2017 revaluation, which could jeopardise many small businesses.

The New West End Company, representing many West End retailers, has called for CPI rather than RPI increases in rates, as well as transitional arrangements to be put in place to help businesses manage the expected doubling of business rates in the West End.[6]

The financial burden of business rates appeals should also be tackled to create greater financial certainty for councils. Westminster had 35,000 appeals after the 2008 revaluation and still has 12,000 to resolve years later, leaving the council short of those funds.

The business rates system should look to reward growth in business rates as a result of refurbishment of existing space, as well as new floorspace growth. Otherwise, councils will continue to gain more financially from large new retail premises than from small refurbished offices for ICT firms, regardless of what generates the most productivity or jobs.

Devolution of other property taxes, including stamp duty, would also mitigate the risk of over-reliance on one tax, and sharpen the incentive to build (or permit) more new homes, keeping the city within reach of as many firms and workers as possible.

3. Additional bands for council tax

All councils should be able to raise council tax rates without referenda – with voters having their say at elections. The tax should also be reformed. Currently it is based on the number of people living in a property, and the property's estimated value in 1991.

In an area like the West End, where property values have soared, small one-bedroom flats can pay the same as multi-million pound mansions. Local authorities should also be able to introduce extra council tax bands at both the higher and lower end where locally appropriate, to better reflect local property prices and the local economy.

In addition, the restriction on additional revenues should be lifted to allow councils to spend these funds in ways that best match local needs and priorities.

4. Greater flexibility over smaller taxes, fees and charges, to recoup the costs of success

The West End should be able to levy small, geographically specific taxes – such as tourist taxes and hotel taxes – where this can be agreed by the businesses involved in Business Improvement Districts.

Tokyo's accommodation tax and New York's hotel room occupancy tax, for example, are set and levied by the city to generate revenues that can be reinvested into tackling the costs of being a successful tourist location.[7] Camden and Westminster, alongside all other councils, should also be able to recover full costs for discretionary services.

The West End is an area of significant economic potential within a thriving capital city but it needs to act quickly to tackle constraints to growth. Giving London greater devolved tax powers, fewer borrowing constraints, and the ability to invest prudentially, in partnership with the private sector, would give areas important tools to boost economic growth and generate additional tax to fund infrastructure in the West End, London and across the UK as a whole.

Endnotes

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Patchwork city – how should the West End be governed?

John Dickie

What is the West End? If you asked someone to describe it, they'd probably talk about some of the iconic shopping areas, like Oxford Street or Bond Street. For others, the West End is a cultural area stretching from Soho, through Theatreland, all the way down to the South Kensington Museums.

There is a ward within the City of Westminster which is called "West End" – including large parts of Soho and Mayfair – but no one uses that to define its borders, apart from the Returning Officer and the competing candidates at local elections.

The West End as a cultural and geographic concept has been around for over 200 years, apparently picking up the name when major development took place from the 18th century onwards. Villages and parishes then on the edge of London – such as Soho, Marylebone and Mayfair – became part of the growing urban metropolis.

With all of these confusing historic and geographical concepts, it's easier to define what the West End is *not* – it is definitely not a unit of governance. And therein lies the origin of many of its challenges.

This problem is not unique to the West End. Many places in London that have a definite identity for the local resident or visitor can find themselves on the fault line between two or more London boroughs. This often presents challenges in looking at an area holistically, and ensuring a coordinated approach to development.

Who has a say in what happens in the West End?

One geographic definition, used in this essay for simplicity, is that of the West End Partnership, which defines the West End as the area bounded by Marylebone Road to the north, Kingsway and Park Lane to the east

and west, and Birdcage Walk to the south. It is a dense concentration of economic activity, largely within the City of Westminster, with the eastern part in the London borough of Camden.

Businesses within these three square miles are responsible for contributing £51bn to London's gross value added (GVA), or nearly 3 per cent of the UK's entire output. On average, 750,000 daily visitors use the area's stations, with more than 610,000 people working in the area, representing around 10 per cent of London's workforce.[1]

The shopping area around Oxford Street, Regent Street and Bond Street contains 244 flagship stores and more than 350 other shops which together turn over £24m every day.[2] The West End's historic and unique cultural attractions include 30 museums and galleries, three Royal Parks and 40 theatres representing the bulk of London's £634m theatre market.[3] Adding in hotels and restaurants, the area's 31.5 million international and domestic tourists spend £11bn per year. By comparison, the West End's economy is easily larger than that of four EU members – Estonia, Latvia, Cyprus and Malta.[4]

However, the only people who have a say in decisions around planning, licensing and the provision of local public services that affect the West End are those people fortunate enough to live within the City of Westminster or the borough of Camden.

This doesn't result in the kind of governance structure that gives equal balance to businesses, residents, workers, tourists, and the hundreds of thousands of Londoners who make use of West End facilities every day.

Other London governance models

As noted above, other seemingly cohesive areas are split between different local government units, so the challenge is not novel to the West End. But the West End's sheer economic scale, and its importance – not just to London, but to the country's prosperity – makes meeting the challenge all the more important. Other governance models are available for similarly important parts of the London economy, which come with their own advantages and challenges.

The City of London is perhaps the area most similar to the West End in terms of its concentrated economic impact. It has a governance

structure all of its own, drawn from its medieval past. The history is too complex to go into here, but essentially 25 wards elect councillors and aldermen, with four of these wards being largely residential and the others dominated by the votes of businesses (with the number of votes based on the size of the business).

The ratio of workers to residents is much greater than the West End, with some 414,600 workers and only 7,400 residents.[5] The model is easily derided: Guardian journalist George Monbiot described it as the "place where democracy goes to die", which depends on whom you're seeking to represent. It is clearly arguable that the interests of the City's very large workforce needs to be properly taken account of in decision-making.

However, whatever the merits, it is difficult to see it being replicated elsewhere – particularly in the West End, where the overlapping interests of residents, shoppers, businesses and tourists are even more complex.

At Canary Wharf, development has been managed to create a mix of commercial, retail and hospitality services as its owners have built a new central business district. Again, the governance arrangements are difficult to replicate, in this case for two reasons.

The first is that Canary Wharf is in single ownership, which has enabled cohesive, long-term commercial planning. The second is that, in its early phases, Canary Wharf was under the auspices of the London Docklands Development Corporation (LDDC). The LDDC had sweeping planning powers that enabled swift growth without the usual requirements for resident/borough approval.

Since the LDDC's demise, Canary Wharf has reverted to being subject to the planning and other policies of the London borough of Tower Hamlets; however, it remains one cohesive estate, which owns and manages the local infrastructure, and has established its high-rise, high-density development model.

Estates of a somewhat different kind also play a key role in the West End, with the Crown Estate, Grosvenor, Portman, Howard de Walden and City of London Estates all holding significant swathes of property in the area. This has the benefit of providing a more united voice from property owners than is the norm in London, and supports a more strategic and long-term view of the West End's future.

Indeed, the grand and attractive architecture which entices so many visitors is largely thanks to the regenerative zeal of these estates at the beginning of the last century (coupled with some ambitious investment plans more recently). But unlike Canary Wharf, those estates neither own the public realm nor, as in the City, have a vote in local elections.

The emergence of BIDs

There have been a number of initiatives to try and bring together businesses and empower them with more control and responsibility over the local areas upon which they depend. The latest such model is the Business Improvement District (BID), a concept pioneered in the US and Canada in the 1960s, and allowed under UK law since 2003.

In essence, BIDs are business-led and business-funded bodies formed to improve a geographically defined commercial area with the goals and funding agreed by majority ballot.[6] There are currently seven BIDs operating in the West End area: New West End Company, Marble Arch, Baker Street Quarter, Northbank, Heart of London, In Midtown and the Fitzrovia Partnership.

BIDs give a voice to local businesses in setting and driving forward the improvement and promotion priorities for their local area. They also provide financial resources through a BID levy on business rates to allow businesses to supplement council activity, such as paying for additional promotion, street cleaning, security or other benefits.

However, there is always a nagging question around whether additional activity by business means proportionally less spending by the local authority in the longer term. If the BID takes over street cleaning duties, does the council see that as an opportunity to reduce its overall spend by the same amount? And if not in Year One, what about Year Four…?

This issue was explored in a review of the London BIDs undertaken by the London Assembly Regeneration Committee, which recognised BIDs' concerns that their activities need to be seen as "additional to, and not a replacement for, councils' management of the high street".

BIDs in both Vauxhall and Brixton cited the impact of falling local authority funding on their work programmes, and the report recommended that BID revenues should not become a "substitute funding

source for cash-strapped public services". Aware of this risk, the London BIDs have generally been careful to take on the running of public services only where they can improve the management or delivery, rather than filling financial holes.

Developing the West End Partnership

Recognising the complex relationship between business, investment, growth, visitors and residents, the City of Westminster set up the West End Commission in 2012 to look at the West End's operational and strategic challenges and opportunities.

The Commission conducted a major enquiry into how the West End works, its potential and how to manage the tensions between residents, businesses and visitors. With commissioners drawn from across residents' groups, academia, government and the business community, it took evidence from 80 different participants as diverse as the Welsh Church and G-A-Y nightclub.[7]

Its final report in April 2013 found that "the West End is a key national and regional asset without a naturally coherent governance and incentive system", and that "this fundamental weakness must be corrected if the West End's long term success as a place to live, work, visit and invest is to be actively promoted". One of its proposed solutions to this problem was the formation of a West End Partnership.

The West End Partnership was launched in 2015 and is a coalition of public and private sector partners – including the borough of Camden, Westminster City Council, Transport for London, the Greater London Authority, London First, residents' associations, BIDs, property developers and others. It has a board to provide strategic direction, with a cross-section of senior players from across all sectors, chaired by the Leader of Westminster City Council, Councillor, the Baroness Couttie.

In consultation with other local stakeholders, the Partnership has agreed a vision of what the West End should be in 2030. The vision protects and promotes the West End's vibrant economic creativity, providing jobs and opportunities not just for immediate residents but for all Londoners. There will be improved transport flow and air quality, high-quality public spaces, and an environment that is safe but relaxed.

Alongside this vision, the Partnership has a delivery plan with an agreed set of projects and programmes, some of which are already in train. For example, Westminster and Camden have committed, through the Partnership, to determine a more flexible and consistent planning regime to encourage growth, density and the mix of uses in a way that also works for residents.

This will mean both councils further coordinating their strategies in areas of shared interest, as was the case with the approach taken to Tottenham Court Road Opportunity Area. The split of the London Plan homes and job targets for the area has now been agreed between the boroughs – around 60 per cent of the homes and half of the expected jobs will be provided in Camden, with the remainder in Westminster.[8]

Looking forward to devolution

As always, one of the biggest barriers to success is money. The West End collects very high levels of business rates: more than £1.8bn is collected by Westminster every year, or more than 8 per cent of the total collected in England.[9]

However, these go to national government and are centrally pooled and redistributed. This redistribution fails to take into account the burdens on the West End from managing the impacts of its high number of visitors and workers, and the need to create a business environment capable of supporting 3 per cent of the UK's GVA.

The Cameron government had announced plans to restore local business rates to local authorities, but the details were vague. It remains to be seen how the new government will approach devolution. But local government in general – and the West End in particular – will be strengthened by a fiscal regime which incentivises local councils to encourage economic growth by allowing them to retain the increase in business rates that such growth generates.

Linking growth to benefits for these local stakeholders is perhaps the biting point for the West End partnership. If residents can see how growth benefits them, and business can be seen to drive that growth, then some of the concerns over development will surely ebb. Similarly, if business rate retention takes place then local authorities will have the resources to manage the impacts of growth.

This is a task for all of the stakeholders in the West End Partnership, as they all have a strong interest in demonstrating that growth is good for the area.

A challenge for the future

Meeting this challenge is urgent. The West End is facing a competitive challenge on all fronts – for retail spend, as an entertainment destination, and as a place to do business. This challenge comes not only from European cities like Paris or Amsterdam, but from elsewhere in London: from the City, Canary Wharf, the Westfield shopping centres, and potentially soon from the development at Old Oak Common.

One thing that all of these centres have in common is a clear sense of place, direction of development and a strategic plan aligned between the developers, owners and borough. The different stakeholders in the West End Partnership must show that they can come together to achieve the same if the West End is to keep pace.

Its key initial test will be delivering its action plan, which requires the Partnership to keep its diverse members aligned and all local stakeholders engaged. Working with the GLA and TfL to deliver the Mayor's commitment to pedestrianising Oxford Street will be a further early test.

Is the Partnership the right structure to bring the West End's interests together and drive change? Some would surely prefer a more *dirigiste* structure: perhaps a mayoral development corporation like the Olympic Park, to drive change rapidly and decisively. Similarly, there will doubtless be some residents' groups who oppose any development that affects their neighbourhood, and who criticise their councils for being open to change.

Nevertheless, a partnership bringing together competing interests which moves in lockstep against an agreed plan, based on shared data and ambitions, feels like the most sustainable path for maintaining and enhancing the West End's future. Rather like democracy, it's the least worst governance solution for one of London's – and the UK's – most important local, global centres.

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Sweating the asset: placemaking leadership for the West End

Craig McWilliam

London's greatest success factor is its ability to attract and retain talent, nationally and internationally. Vital to attracting and retaining that talent are great places: districts with a compelling mix of opportunities, amenities and jobs. It is profoundly challenging to create and manage such places in London. The capital's enviable success, rising demand, and growing population are putting intense pressures on our infrastructure, our communities and our quality of life.

The challenges of placemaking in the West End

The West End – London's powerhouse, more productive than the City of London – sits at the epicentre of these pressures. At its heart, Oxford Street manifests many of them. Half a million people walk down the street every day, but it also has high levels of traffic, poor-quality public realm and inadequate amenities. Air pollution is three times higher than the EU's legal limit, and the street's western section holds the dubious honour of having one of the country's top three pedestrian accident hotspots.

There have been recent improvements to the West End's infrastructure and more are due shortly, with the Elizabeth line being the most high-profile example. But these, in turn, will create greater access to, demand for and pressure on the West End. On Oxford Street alone, the Elizabeth line's two new stations are expected to disgorge 120,000 more people every day: a 40 per cent increase on today's numbers.

What's more, the West End faces a floorspace capacity crunch. Westminster City Council forecasts around 77,000 new jobs in the

borough by 2036. The additional economic activity implied by this target will require around 2m square metres of extra employment space in the next 20 years. This totals three times the amount delivered in the last 20 years. Meanwhile, vacancy rates are at a 15-year low.

The West End will have to grow to overturn these pressures on its infrastructure, communities and quality of life. In response, our civic leaders should increasingly be judged on the quality of the places their policies create. We should judge their ability to create great places that 'sweat' the West End for greater opportunities, better amenities and more jobs. We should assess the way in which they coordinate public and private investment and capture value growth for long-term benefit. Bold placemaking leadership from the public sector – backed by a vision for growth and a transparent depiction of the trade-offs – will be the starting point for the West End's success.

The West End Partnership – the coalition of public-sector agencies, private-sector players, residents and amenity groups – has created a long-term vision for that growth. In doing so it has put discussion of the trade-offs on a more credible footing. It has begun to articulate the local benefits of growth – the residents' dividend – as a counterpoint to currents in local politics that could frustrate the best outcome. And it has avoided the false trade-off between densification and enhancing the unique character of the West End. It is seeking economic growth, the creation of new jobs *and* a better experience for residents, with better facilities, amenities, public spaces and quality of life. It wishes to see the West End meet rising demand *and* improve the experience of all users.

Critically, the Partnership has identified the need for £1bn of new investment in the West End over the next 15 years. Half of that investment is unfunded. Arguably, little of it will be delivered without new private capital. Any successful campaign to secure that investment will need to operate under a broad consensus that physical and economic expansion will not erode the West End's unique character.

A new approach could help foster that consensus and attract that investment. With a new approach, the West End Partnership's 15-year vision could be translated into an ambitious district-by-district plan for growth, each informed by an assessment of that district's potential to host more jobs, better places and greater opportunities for Londoners.

The West End's districts all have a different character. Just think of Soho, Covent Garden, Tottenham Court Road or Oxford Street. Each has varying levels of untapped potential and would benefit from a tailored plan backed by predictable and stable funding – which would in turn attract new private capital. Fiscal devolution, through an early retention of business rates if necessary, could finance a transformative programme of stable investment. The Mayor argues that Londoners should benefit more from the proceeds of growth, with more control over incremental tax revenue raised in the capital. There are few other options to deliver the investment the West End needs at the pace required. And perhaps there is no better place to start on the road to fiscal devolution than in the country's most productive commercial centre.

A focus on the Oxford Street district

With that context, we have, with others, commissioned new research to gauge the potential of the Oxford Street district, starting with its western section. The research concludes that the area has substantial untapped potential to host more jobs and fundamentally better places; and that unleashing this potential will require tackling two of the principal risks facing the West End and London.

The first of these risks is that Oxford Street's poor public realm and pedestrian experience, its high volume of bus and vehicle traffic, and its fragile monoculture will erode the West End's competitive advantage if left unchanged. Oxford Street's ability to attract visitors, investment and talent to London, as well as to provide new jobs, will diminish.

The Mayor's commitment to transform Oxford Street's traffic is hugely welcome, as is the West End Partnership's shared aspiration. They are necessary, if not sufficient, conditions for the West End's success. And of course, a traffic plan and its funding have yet to be established.

The second risk is that the West Oxford Street district, and the wider West End, are characterised by an employment space shortfall that will, without intervention, undermine London's competitiveness. As it stands, the area has the second-lowest proportion of commercial space of any district in the West End and roughly half the employment density of neighbouring Regent Street.

From these stark assessments emerge the outlines of an investment and management plan that could unleash the district's potential and see West Oxford Street work harder for London.

First, Oxford Street and its neighbouring areas could complement and drive each other's success. In doing so, they could radically improve the user experience and strengthen the retail offer. Successful retail destinations are in almost all cases conceived as wider districts. Our research makes comparison with Regent Street, Cheapside and Knightsbridge, and with Rue de Rivoli in Paris, Biblioteksgatan in Stockholm and Fifth Avenue in New York.

The most effective shopping centres benefit from leisure and cultural uses beyond retail therapy, often into the evening and night-time. They have high-quality public spaces and connect smoothly to their neighbouring areas. Changes in physical space could create a better, more integrated Oxford Street district for all users – a fundamentally better place, helping to drive a better retail destination.

Second, the area around West Oxford Street could host a greater volume and variety of economic activity to boost jobs growth in London. The district currently has around 70,000 workers (and 6,000 residents) and supports a wide range of jobs: the majority (41 per cent) are in professional services and one-third are in retail. It could do more.

Supported by a new district-wide planning regime promoting growth, it could host around 15,000 more jobs than it does now: a quarter of Westminster City Council's jobs target for the entire borough in the next 20 years. Our analysis suggests job-hosting capacity could be unlocked through a combination of changing uses, more intense use of existing spaces, and physical expansion through development. This could boost the district's economic contribution to London by one-fifth, lifting gross value added (GVA) from £5.6bn to £6.8bn by 2030.

Third, consistent and predictable public funding could unlock private capital and coordination. Businesses could shape their commercial strategies around an agreed and funded placemaking plan. Disparate private ownership on and around Oxford Street need no longer prevent coordination. Improvements to infrastructure, public realm and day-to-day management could be delivered on a continual basis with closer collaboration between the public and private sectors.

Our analysis of the West Oxford Street district suggests that the challenges for the West End are great. The West End faces fierce national and international competition from other commercial centres, new forms of retail and new public spaces. The opportunities for bold, growth-promoting leadership from all tiers of government are substantial. Ambitious place-based policy, a set of district-by-district investment plans, and the consistent funding needed to deliver both, could sweat the West End's substantial potential for great places, and help drive London's greatest success factor.

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