Daniel Reast and Rob Anderson

West London's Growth Potential:

Leveraging the opportunity for a more polycentric city

CENTRE FOR LONDON

West London's Growth Potential:
Leveraging the opportunity for a more polycentric city

Daniel Reast and Rob Anderson

Published by Centre for London, February 2025

About the Authors

Daniel Reast

Daniel is Research Officer at the Centre for London. He joined in September 2024 from LCA where he worked as a member of its Insight team. Before joining the Centre, Daniel worked as a senior researcher for a policy conference production company, as well as a freelance writer and journalist. His writing credits include Metro, the Independent, Big Issue, and Daily Mirror. He has comprehensive insight and interest in political geography, local government and the built environment. Daniel holds a Master of Research (MRes) in History, and BA (Hons) in History and Politics, both from the University of Portsmouth.

Rob Anderson

Rob is Research Director at the Centre for London. Rob joined from the Centre for Homelessness Impact where, as Director of Knowledge Implementation, he worked to transform the use of evidence and data in local and national government to end homelessness faster across the UK.

Rob has worked across numerous government departments, including HM Treasury. Prior to working in government, Rob worked for charities tackling social injustice across London. Rob holds a BA Hons from the University of Oxford where he was a Craythorne Scholar and an MSc in Inequalities and Social Science from the London School of Economics.

Acknowledgements

This project would not have been possible without the support of our funders, Ealing Council, who initiated the project, and our supporters the West London Alliance, and Imperial College London.

We are grateful to everyone who shared their time and expertise with us throughout this project. We would also like to thank Cllr Peter Mason (Leader, Ealing Council) for his insight and engagement with the research team throughout the delivery of this project. We also thank the members of our Project Group: Kasem Abbas (Senior Regeneration, Investment & Jobs Officer, Ealing Council), Sophie Beagles (Head of Regeneration, Investment and Jobs, Ealing Council), Stuart Bridgett (Finance Policy Manager, London Councils), Dr Katy Ingleby (Public Affairs Manager, Imperial College London), and Majeed Neky (Assistant Director, Economy, West London Alliance).

We would also like to thank everyone who gave their time to be interviewed or take part in roundtables for this research, including John Anderson (Chief Investment Officer, Imperial College London), Dr Jack Brown (Lecturer in London Studies, King's College London), Mark Frost (Director, Heathrow Strategic Planning Group), Ben Gomez-Baldwin (Director, Park Royal & London, SEGRO), Tom Goodall (Chief Executive Director, Related Argent), Bonnie Minshull (Head of London, SEGRO), and Paolo Nistri (Head of Regeneration and Economic Development, Old Oak and Park Royal Development Corporation).

Thanks also go to our partner Savanta, who provided exclusive polling data referenced in this report through our What London Thinks programme.

Thanks also go to our colleagues at Centre for London - particularly Antonia Jennings, who represented Centre for London at a roundtable hosted by the West London Alliance, Ealing Council and Imperial College London.

Nonetheless, the findings, interpretations, and conclusions presented in this report are the result of independent research conducted by the authors. The views expressed are solely those of the authors, and all errors and omissions remain our own.

Foreword

So much of what makes London a great city also creates some of its biggest challenges. Economic and urban policy has concentrated growth and investment in Central London, resulting in the unequal distribution of wealth and opportunity across the capital. Competition for land, the space that makes growth happen, has ratcheted up London's residential property market whilst also constraining the opportunity for business led growth.

We are at a tipping point for London's economy. We need more homes but equally, we need the jobs that will allow people to afford those homes. To achieve this, we must move the needle on London's established pattern of economic growth, and resist the temptation to return to the economic orthodoxy of the pre-pandemic patterns of work.

London must equally resist the embedding of 'dormitory suburbs' where people commute from London's outer sub-regions to work in the centre and be radical in returning to the patters of local employment and centres of production across the city that defined the economic geography of the nation's capital. West London is the industrial heartland of the capital and a competitive hub for high growth sectors and frontier innovation and has been throughout its history. With the regeneration of Old Oak, the WestTech Corridor, and a resilient secondary and tertiary economy, West London can once again be the powerful engine of growth for London.

This will require a refocus of our policy, economic and political models. A more polycentric approach that leverages the true potential of sub-regions like West London would secure a more equitable and sustainable economy for London and the UK as whole, whilst generating the wealth people deserve a share of in West London. For Ealing, this means bringing well-paid jobs to the borough through the revival of our local shopping parades, the growth of our office corridor, and the revival and increased productivity of our industrial estates.

We want all parts of London to be as vibrant and dynamic as the heart of the city and that starts with understanding what we are good at and where different parts of London are best placed to exploit their unique advantages. To deliver this we need to grow our economy and this doesn't happen overnight. We are willing to work with anyone that wants to provide opportunities for our residents.

Cllr Peter Mason, Leader of the London Borough of Ealing

Summary

London's monocentric economic model, reliant on an internationalised service sector clustered in the centre, has driven the national economy since the 1990s, but with substantial trade-offs and diminishing productivity and growth returns.

- Recent economic and urban policy has sought to concentrate economic activity in Central London, leading the city to become more monocentric and reliant on the city's Central Activities Zone as London's – and the UK's – economic engine.
- This economic model has significant trade-offs, fuelling substantial socio-economic and geographical inequalities that see the city's other sub-regions, and many Londoners, reaping little of the proceeds of growth.
- Vulnerable to global economic shocks, this model has also generated diminishing economic returns since 2008, with productivity and growth stagnating.
- These diminishing returns could also signal diseconomies of scale in Central London, with mounting housing and infrastructure pressures acting as headwinds to the city's economic success.

A more polycentric approach that unlocks the latent potential of London's sub-regions outside Central London is critical for the economic success of the capital as a whole.

- To achieve the Government's goal of a budget surplus by 2029-30, UK GDP must grow by more than £65bn. Between 2021-22, London's total GDP grew by just 0.8% of this target. If London is to continue to power the national economy and drive new growth, a new approach is needed.
- Continued policy emphasis on the Central Activities Zone risks narrowing opportunities for the established industries and emerging high-growth sectors in London's sub-regions outside Central London.
- A more polycentric approach that better utilises the economic potential of all of London's sub-regions could re-ignite the capital's economic engine and accelerate progress towards a more sustainable and inclusive economy. In particular, this should include leveraging the sectoral strengths and economic resilience of West London.

As the industrial heartland of the capital, West London has the potential to become a powerful engine of growth for the city – in symbiosis, not competition, with the centre.

- A thriving consumer economy worth £70bn GVA, greater than that of Birmingham and Manchester combined, West London generates the same combined product taxes as Central London and has seen rising prosperity in recent years, with household disposable income and median pay growing faster than in the centre of the city.
- Forthcoming research from Oxford Economics suggests that if each of West London's industry sectors performed at the London sector average, West London would contribute an additional £7.3 billion per year in GVA to the economy. This is close to the estimated economic output of Cambridge at £8.4 billion in 2024.
- An increasingly competitive hub for frontier sectors and industrial innovation, over the last ten years West London has outpaced the centre in attracting and nurturing high-growth potential businesses in the professional, scientific and technical sectors. New investment in the WestTech Corridor and high-tech industry and advanced manufacturing at Old Oak and Park Royal indicates this trend will continue apace.

- With a resilient secondary and tertiary economy, West London's strategic and locally significant industrial land is spacious, well-distributed and flexible and its transport links – including Heathrow Airport – generate regional and national economic impact.

Empowering sub-regions to shape and deliver London's industrial strategy would enable West London to capitalise on its economic potential, strengthening London and the UK economy as a whole.

- There is an ambitious economic vision for the sub-region, led by the West London Alliance and its seven boroughs, plus strategic stakeholders including the OPDC and Heathrow Airport Ltd. However, this is limited by a lack of devolved powers and infrastructure constraints. There is scope and opportunity for regional and national policymakers to work with West London to enable sub-regional growth that works in symbiosis with the city's established economic centre and the wider national economy.
- For example, despite a strong base in human capital development seen in the sub-region's competitive skills achievements and high-performing education sector, West London does not have the devolved powers and funding to convert this into higher productivity through a fully-fledged regional and sub-regional skills and employment strategy.
- Further, an established radial transport network and the outsized role of Heathrow as the UK's largest port gives the sub-region strategic national and regional economic importance. However, orbital infrastructure improvements such as the West London Orbital and the Southall and Heathrow link rail lines remain uncertain, limiting opportunities for agglomeration of economic activity within the sub-region.
- Capacity constraints in the electricity transmission and distribution grids also act as a major blocker for commercial and residential development. An accelerated programme of upgrades is needed, to be led by national government.

Based on analysis of West London's economic opportunities and potential, we set out a number of recommendations on how such a shift to a more inclusive, resilient and higher-growth economy grounded in London's polycentric economic history could begin.

National government should:

- Go further and deeper with its legislative programme for devolution, to enable local and regional government to drive growth.
- Expand proposals for devolution of skills, employment and training policy to local government.
- Ensure planning policy reforms recognise, protect and enhance the economic role and potential of strategically significant industrial and commercial land in areas like West London, alongside delivering on national housing ambitions.
- Prioritise tackling West London's electricity capacity constraints through targeted, urgent investment, beyond the current electricity reforms in progress, to ensure that industrial and commercial as well as residential developments can be delivered at pace.

- Invest resources to expand and enhance West London's transport network, including new orbital connectivity to encourage intra-regional economic activity.

Regional government should:

- Ensure the London Growth Plan capitalises on the unique economic strengths of London's sub-regions to accelerate and more evenly distribute economic growth city-wide.
- Ensure the next London Plan gives emphasis to economic development across London as well as residential housing delivery, with new job targets outlined alongside new homes targets.
- Protect, enhance and expand West London's unique industrial and commercial assets to boost growth and employment.
- Further expand Transport for London's investment, maintenance and development portfolio in West London to drive growth.
- Ensure that the the WestTech Corridor and Old Oak and Park Royal are fully developed into a central economic district and a catalyst for growth in London's industrial heartlands.

A NOTE ON AREA DEFINITIONS

This report is an analysis of London's economy and the growth opportunities presented in London's sub-regions, with a focus on West London. This is defined as the seven boroughs and constituent members of the West London Alliance: Barnet, Brent, Ealing, Hammersmith and Fulham, Harrow, Hillingdon and Hounslow. For Central London, this refers to the seven local authorities as defined in the London Plan: Camden, City of London, Islington, Kensington and Chelsea, Lambeth, Southwark and Westminster.

This report also references the Central Activities Zone (CAZ). Representing around 10% of the UK's economic output, the CAZ is defined in supplementary planning guidance to the London Plan as stretching from Kensington Gardens and Nine Elms to the City Fringe, Shoreditch and an enclave at Canary Wharf. The zone's boundaries do not reflect the same local authority boundaries as Central London, making comparisons with other regions of London challenging. Unless specifically stated, quantitative data used in this report which refers to Central London is inclusive of the boundaries of its seven local authorities and not the Central Activities Zone.

Introduction

London's economic geography

Since industrialisation, London's economy has been characterised by the clustering of local and sub-regional self-sustaining economies inhabited by communities skilled to similar or complementary sectors and industries.

These clusters were fundamental to London's industrial economic success, driven by historic centres for manufacturing, such as in Woolwich (armaments), Hackney (fabrics), Dagenham (automotive), and Hounslow (consumer goods).

Through the second half of the twentieth century, however, deindustrialisation saw a reduction in heavy industry across Greater London, a process which saw these sub-regionally unique economic identities diminish.[1]

At the same time, economic activity shifted both sectorally – from industry and manufacturing to service sectors – and geographically. Most prominently, the 'big bang' of financial service reform saw the establishment of Central London as a pre-eminent global centre of financial services.

This economic transformation was underpinned by the twin forces of agglomeration and specialisation, where the clustering together of high-skilled service industries in a small number of districts drove greater productivity benefits and higher growth.[2]

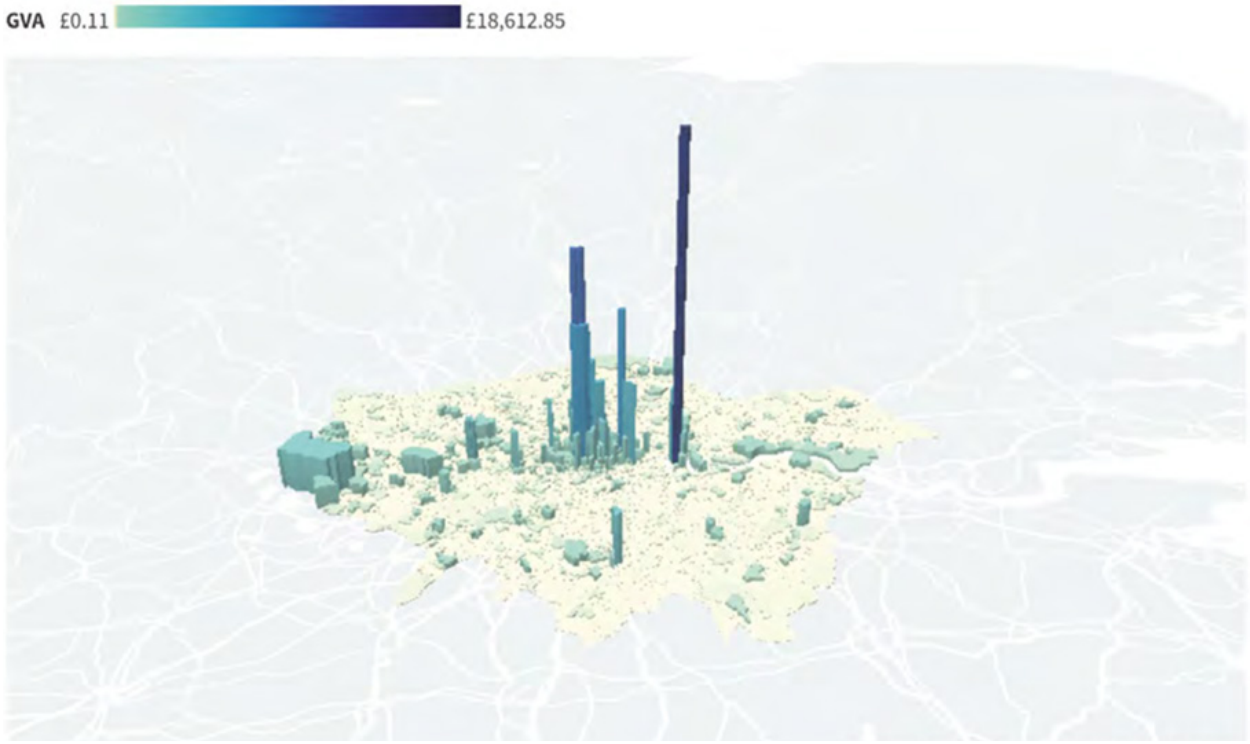
For much of the 1990s and 2000s, London's economy prospered on this model, delivering high levels of GDP and economic output which drove the national economy; productivity growth averaged around 3% per year between 1998 and 2007. During this time, policy initiatives such as the delineation of the Central Activities Zone (CAZ) and predominantly radial transport infrastructure investments (e.g. the Jubilee Line extension) helped further drive economic activity towards the centre of London.

This can be clearly observed in Transport for London's (TfL) geographic representation of rail and Tube lines across the city, where the radial nature of the city's transport links is pronounced.

Today, London's economic output is highly geographically unequal, with activity and output concentrated in a few localities, almost exclusively in the centre of the city, as starkly illustrated in the below map of London's estimated GVA output by Lower Super Output Area in 2020.

London's economic output is highly geographically unequal

Figure 1: Estimate GVA per LSOA, 2020



Source: ONS Open Geography Portal, UK small gross value added estimates[3]

The CAZ generates 48% of London's Gross Value Added (GVA) despite making up just 2.2% of the city's total land.[4] It also hosts 41% of the city's jobs, 33% of the city's commercial floorspace, and 65% of London's total office space.[5]

However, since the 2008 Global Financial Crisis, the trade-offs inherent in London's services specialisation and internationalisation have become increasingly visible, with diminishing economic returns, rising socio-economic inequalities, and a dysfunctional and radically unaffordable housing market.[6] Productivity growth has fallen to just 0.1%, below the UK average, with the high-value financial and business services sectors which had generated the lion's share of productivity growth prior to 2007 unable to return to sustained growth.[7]

What's more, even while productivity was growing, the economic benefits accrued to a diminishing number of Londoners. Income inequality has risen in London over the last 20 years while remaining relatively stable in England overall. This can be explained through the 90:10 net income ratio which measures the income inequality gap between the top 10% of earners and remaining 90%. In 1996/97, the gap between London and the rest of England was 2.5 – today it is 4.9, showing the gap between higher and lower earners is now much larger.[8]

Despite these substantial challenges, a new model to replace London's pre-crisis reliance on high-productivity and high-growth specialised services, clustered in a small number of districts, is still emerging.[9]

A polycentric future for London?

Polycentrism is an economic model where cities or city regions support multiple centres of economic activity. These complement the development of the wider city or city region, rather than cluster economic activity in a single city centre.[10]

Polycentrism does not solely imply the existence of population centres in close proximity, however. Polycentric cities consist of linked urban areas with substantial and interdependent economies and distinct local characters, connected by a dense transport network.[11] Transport connections which distribute economic activity orbitally, rather than just channelling activity to a central economic hub, are critical – without this, economic activity cannot be distributed more evenly across a region.[12]

© Simon Hazelgrove

Whereas monocentric cities dependent on a single, often specialised, economic 'cluster' may be disproportionately vulnerable to shocks and longer-term economic change, more diversified polycentric city economies can offer greater resilience and adaptability, as well as bringing economic growth to a more dispersed population.[13] During periods of economic downturn, sub-regions in polycentric cities can also be easily regenerated due to their pre-existing connectivity, not requiring extensive new transport infrastructure. Single-site or district-level examples of this include Docklands in Melbourne, Orchard Road in Singapore, and Puerto Madero in Buenos Aires.

London displays many of the physical characteristics of a polycentric city, with its distinctive and sizeable sub-regions home to regionally significant economies and large populations. These are underpinned by historic roots, in part thanks to the gradual conversion of former industrial hubs into residential or mixed-use districts, which can be observed still in London's historic neighbourhoods (e.g. film and television in West London). More recently, new growth sectors have established themselves in districts outside of the historical centre, such as tech in the East, life sciences in the West, and creative industries in the North and West.

With the city's monocentric reliance on a few districts faltering, in this report we explore the potential for a more polycentric model for London. We do this by taking a deep-dive into the economic role and potential of one the capital's most economically critical sub-regions – West London – and explore what might be needed to unlock the sub-region's potential to act as a 'second engine' of London's economy.

Case Study: Los Angeles

The benefits of interconnectivity for a polycentric global city

As the USA's second largest metropolitan area behind New York City, Los Angeles operates with a complex web of governance arrangements which are very different in both structure and vision from the UK's system of local government. Local districts are governed at school board level, in municipalities, and at state and federal government level. After the Second World War, Los Angeles experienced a boom in urban development as land developers capitalised on low land values to boost residential growth, expanding the city's population from 576,000 in 1920 to nearly 3 million by 1980.

Los Angeles is the 'poster child' for urban sprawl, due to a devolved and decentralised approach to spatial planning with a zoning system to enable expansion. The city grew into a polycentric region through its freeway system, which was built in the postwar period to enable connectivity to Los Angeles' emerging suburbs and districts.

This connectivity links several major multiple economic centres across the city region, including higher education, technology and innovation industries in Irvine, aerospace in Downey, a historic automotive industry base in Torrance, and the growing services hub in Santa Clarita, rather than clustering economic output in Los Angeles' more densely populated districts. Importantly, however, the freeway system has been criticised for severing neighbourhoods and reinforcing neighbourhood inequality.

This offers a lesson for global cities to ensure transport infrastructure maximises interconnectivity and disperses economic activity and development, while balancing the needs of residents and communities. The heavier reliance on car use in Los Angeles, and the dominance of the city's road network for transport connectivity, also serve as a lesson for West London's growth – highlighting the need to ensuring that businesses can benefit from better orbital interconnectivity, in a more environmentally and socially sustainable way.

Chapter 1
West London's economy today

© Imperial College

"Looked at from above, West London isn't so much a city as a forest with buildings."

- Bill Bryson

Since the earliest days of industrialisation, West London has been key to London's economic growth and has fuelled its development. From Heathrow's status as the 'front door to London', to motor manufacturing in Cricklewood and Park Royal, health and scientific research in White City, and the famed Ealing Comedies – West London's output has driven the city's future.

Bryson's description of a 'forest with buildings' reflects West London's integrated urbanisation, driven by rapid residential growth in the Victorian era prompted by new transport links to Central London. The 'Metroland' of Neasden, Wembley, Harrow and Pinner entrenched West London's characteristic 'leafy green' low-density suburban development.[14] Today, the total amount of land for residential gardens in West London is over 1.29 times the amount of developed land in the whole of Central London.[15]

Figure 2: West London: Economic Centres and Transport Routes

Source: Centre for London, West London's Growth Potential

West London's economic geography today is unlike that of many other global cities. Its industrial heritage and rapid residential growth has created a sub-region with a diversity of places, where development has occurred organically as the city has grown. This is unlike other polycentric global cities such as Manila and Los Angeles, where districts have been more deliberately developed through central planning and aimed at fulfilling a specific economic focus. Business parks in Ealing and Hounslow sit alongside residential streets and industrial buildings, while transport hubs at Old Oak, Willesden Junction and Hayes are infused into their urban makeup of town centres, public service buildings, a diversity of residential developments, and an evenly distributed network of green spaces. Unlike other new destinations in London, West London's emerging sites such as Brent Cross Town, Wembley Park, and Olympia incorporate existing transport corridors and public services, benefitting from increased footfall and locational benefits.

West London's history has also conferred important economic advantages today, thanks in part to strong transport links. While deindustrialisation saw East London's manufacturing bases decimated, West London has retained manufacturing, transport and utilities businesses, aided by Heathrow, access to the M1 and M4 motorways, rail links to the North and West of England, and shipping on the River Thames at Brentford and the Grand Union Canal. Ealing is a clear example of the retention of industry in West London, boasting the largest reservoir for strategic designated industrial land of any London borough at 481 hectares.

Today, this infrastructure and economic history have allowed foundational sectors in the sub-region's secondary and tertiary economies[16], such as construction, to maintain growth alongside the emergence of new high-growth sectors. Examples of this include the emergence of the WestTech Corridor, where pre-existing industrial land and workforces in manufacturing, transport and logistics support and complement the development of a growing cluster for frontier sectors in Old Oak and Park Royal. These frontier sectors include life sciences, and growth sectors including the creative industries, advanced and high-tech manufacturing and green industry. Similarly, the growth of the experience economy around Wembley, now a major destination for events, hospitality and creative activities as well as new housing, has been supported by well-connected workforces, particularly in the construction and retail sectors.

A large, diverse and geographically dispersed economy

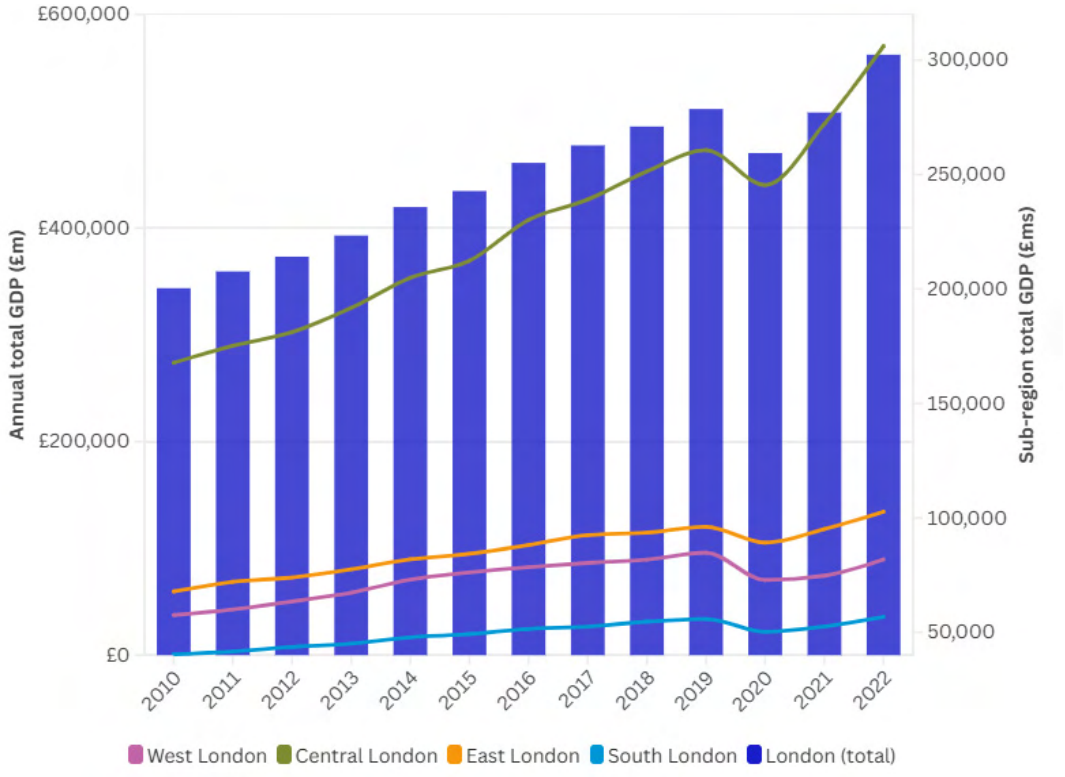
As a result, West London's economy today is substantial, with a Gross Value Added (GVA) of over £70bn, larger than Leeds and Manchester combined.[17]

The anchor to the sub-region's economy is Heathrow Airport, whose economic footprint equates to £7.75bn in GVA, both directly and indirectly through supply chains.[18] The UK's only hub airport, and the largest in Europe, it also supports over 105,000 jobs in the Heathrow region, with 6.3% of the region directly employed in Heathrow's economic footprint.

One interviewee described Heathrow as a "major asset which remains underappreciated" in a national and regional context. With a workforce of more than 76,000 people on top of an expansive local supply chain network, it is a strategic catalyst for other foundational and growth industries in West London as well as vital enabler for realising the UK's GDP ambitions and deepening trade links with the global economy.

Over the last decade or so, West London has seen stable, if not spectacular, growth, with GDP growing by 42% between 2010-22. This is, however, considerably lower than Central London at 82%. The sub-region was hit hard by Covid-19, likely due to the outsized role of Heathrow: by 2022, Central, East and South London had all surpassed their 2019 GDP levels in 2022, while West London had not bounced back.[19]

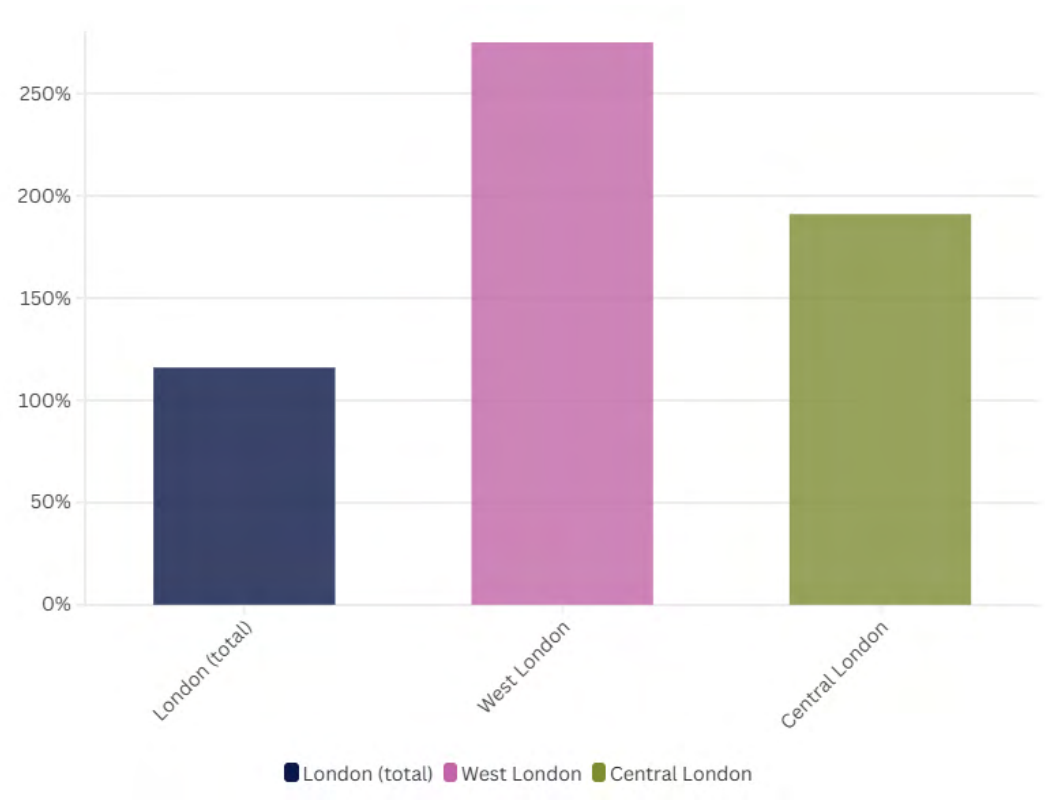
Figure 3: London: GDP by sub-region (£m), 2010-22



Source: Office for National Statistics (2024), Regional gross domestic product: local authorities.

Underneath these headline figures, however, there are signs of relative economic resilience and opportunity, even when compared to Central London. West London's business activity has grown steadily in recent years, overtaking Central London in the number of active businesses. Analysis of London's total number of businesses shows West London's business sector has flourished, with the number of businesses rising by 171% between 2010 and 2024. In comparison, the number of businesses in Central London rose by just 50% in the same period.[20] Analysis of workforce numbers suggests that this growth is driven by West London having a greater number of SMEs utilising the sub-region's transport connections and comparatively affordable workspace.

Figure 4: London: Percentage change in number of businesses (sub-region), 1998-2024



Source: Office for National Statistics (1998). Size Analysis of United Kingdom Businesses: Data for 1998.

Data also suggests West London is a competitive destination for new businesses, with new business growth more resilient than in Central London. In 2017, the number of business births in West London was 17,625, decreasing slightly (7.4%) to 16,305 by 2022, contrasting to Central London where business births fell at a significantly higher rate of 17.9%.[21]

This growth in business activity is thanks in part to the sub-region's diversity of industries, having seen substantial growth in employment footprint across foundational, secondary and tertiary economic sectors such as construction, transport and retail between 2010-22.[22]

This diversity can also be observed in West London's economic geography, with multiple areas of commercial and industrial activity located close to major public transport connections and relatively dispersed across the seven boroughs. This economic geography could lend itself to more inclusive and evenly distributed economic opportunity and growth.

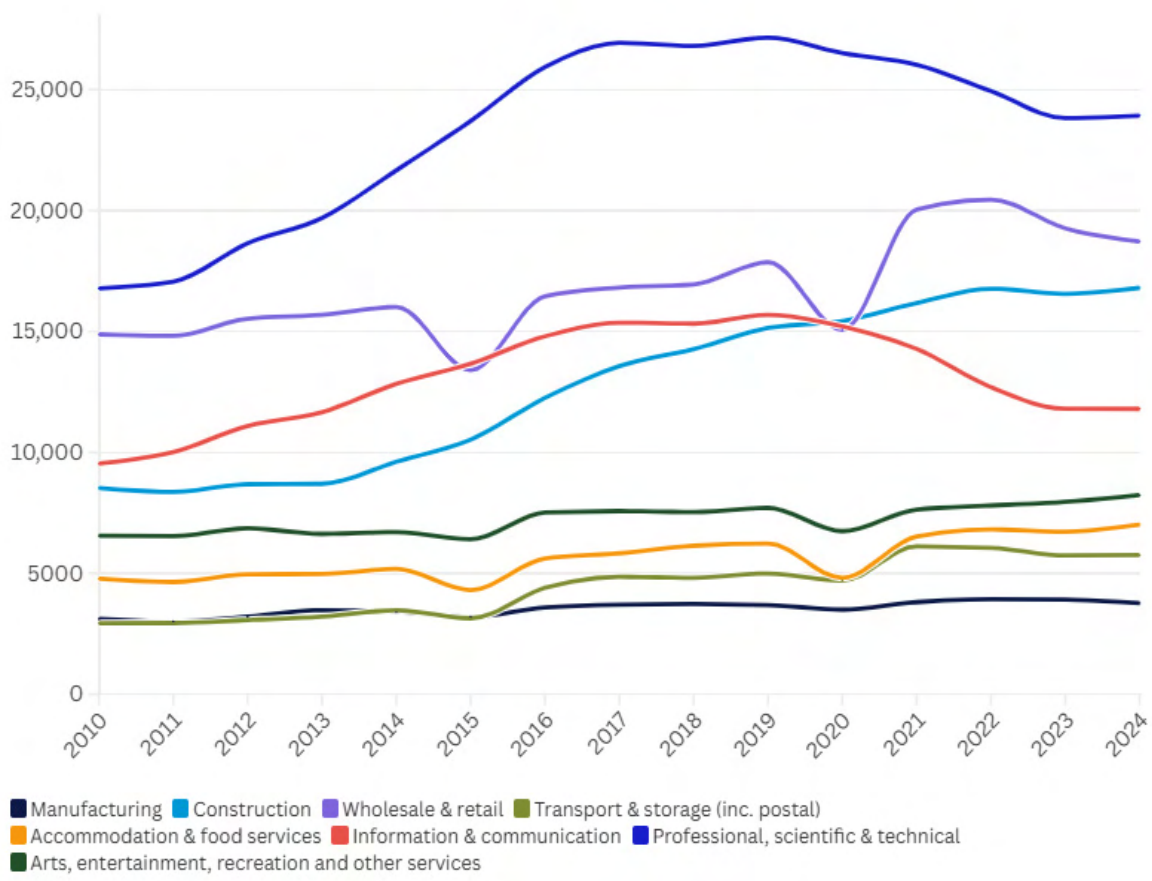
Comparative success in attracting and nurturing new business activity in high growth industries could be an early signal of diseconomies of scale in Central London

Factors such as high land prices and rent costs along with transport congestion often act as an disincentive for new business growth in crowded city centres, raising the comparative appeal of industrial districts elsewhere in the metropolitan area.

There is some evidence of this in recent sectoral trends in London, where West London business growth in some key sectors is outpacing growth in the rest of the city. Since 2010, West London's highest sectoral growth was in construction, where the total number of businesses in the sector rose by over 97% and above the total growth rate for Greater London at 90%. West London also outperforms the wider London growth rate for the number of businesses in the accommodation and food services sector (hospitality) by 47% to 26%.

Specifically, interviewees highlighted the clear "window of opportunity" to harness the existing breadth of West London's sectoral mix to boost inclusive growth, utilising the sub-region's complementing supply chains for industries such as storage and logistics, manufacturing, retail and hospitality.

Figure 5: West London: Number of businesses by industry group, 2010-24



Source: Office for National Statistics (2024). UK Business: activity, size and location.[23]

[i] Enterprises in this sector include biomedical and natural sciences, engineering, architectural and technical research, veterinary activities, and agricultural science. Businesses in the science, innovation and research sector are primarily classified as part of the 'Professional, scientific and technical' category of the UK Standard Industrial Classification. This category also includes businesses in legal and accounting, management consultancy, advertising and market research.

Notably, West London is increasingly home to clusters of life sciences, research and innovation businesses, responsible for developing new technologies, products and processes which have rapidly become a high growth sector and UK export.[i] While overall West London has 77% fewer employees in these professional, scientific and technical sectors than Central London[24], the number of businesses in these sectors was 43% in West London between 2010 and 2024, above the 39% growth seen in in Central London.[25]

Growth Area: The WestTech Corridor

Innovation as a catalyst for growth

© Imperial College

In March 2024, Imperial College London launched a new strategy to develop the WestTech Corridor, a vibrant new innovation ecosystem across West London. It will become a powerful engine for investment, inclusive economic growth and job creation in life sciences and innovation, based primarily at five major assets in South Kensington, Paddington, White City, Old Oak and Park Royal, and Silwood Park in Berkshire.

The Corridor is an ambitious project to create a globally competitive hub for innovation, entrepreneurship and technological advancement- an ecosystem in West London. It builds on the strengths of Imperial's College's existing campuses research and innovation in South Kensington, Paddington and White City and expands opportunities for start ups and SMEs to co-locate and grow their activities in the industrial heartland of Old Oak and Park Royal. The Corridor will also benefit from the development of transport infrastructure and local assets, such as the opening of Old Oak Common station. This will enable knowledge exports through connections to other innovation clusters in the UK in cities such as Oxford, Birmingham and Warwick, as well as around the world through the proximity to Heathrow.

The WestTech Corridor is intended to promote cooperative enterprise and nurture new and expanding ventures from start-up to scale-up phases, enabling companies to grow in West London with dedicated spaces for incubation and growth, from testing ideas and prototypes all the way through to advanced manufacturing on a large scale. This will maintain and build momentum for science, innovation and research industries in the sub-region. The WestTech Corridor is already in development, with Imperial College London investing into a prime industrial site in Old Oak from logistics developer SEGRO in November 2024, aimed at driving the development of flexible and affordable spaces for new science and innovation projects.

This 'frontier economy' of West London is "modest but growing", particularly for industries with strong links to higher education, science and innovation sectors. Imperial College London's White City Innovation District campus, a centrepiece of Hammersmith and Fulham's industrial strategy, brings together academia and the private sector, including small businesses in life sciences, medtech, sustainability, data and digital, and wider innovation industries. The district's attractiveness for technical and scientific employment has increased the number of deep tech businesses in the area by 79% between 2019-2023 with 219% more employees.[26] Similar expansions in this area include the business engagement and research activities of Brunel University, which has demonstrated significant strengths in frontier and applied innovation based at its Uxbridge campus, and ARC West London, which sits on the former site of a former sugar processing factory in Fulham.

Employment growth in high-tech sectors has not been restricted solely to West London's inner boroughs. Between 2010 and 2022, the outer London borough of Harrow had the highest rate of growth for employees in professional, scientific and technical businesses, increasing by 71% from 7,000 employees to 12,000.[27] This change in Harrow's employment profile coincides with the recent development of the borough's higher education sector – for example, South Harrow hosts University of Westminster's Harrow Campus, which has been developed across 9.6 hectares to include student accommodation, sports facilities and teaching and workshop facilities, hosting the university's creative and digital subjects.

Compared to other polycentric global cities, West London's growth has been resilient and organic with industry dynamically matching the needs of markets, consumers, and the wider London economy. There is an opportunity to build on this base through more assured, deliberate investment in West London which has previously delivered significant returns for economic growth in the sub-region. One interviewee described this as the willingness of the "entrepreneurial state" to target investment to specific areas with high growth potential. In West London this has been seen through the development of White City, Heathrow Airport and the Old Oak and Park Royal Development Corporation area. In Barnet, the regeneration of Brent Cross, Cricklewood and Staples Corner is also an example of how the 'entrepreneurial state' has unlocked opportunities for mixed-use redevelopment, driven by a successful public-private approach to investment and a compelling economic vision.

Furthermore, this integration of investment and innovation as a key enabler for economic growth is also part of the OPDC's emerging economic 'vision'. This prioritises frontier and industrial innovation to underpin the transformational growth and redevelopment of the area, with the OPDC's location at the heart of the WestTech Corridor, the HS2 interchange at Old Oak Common which will enable rapid links to manufacturing in the West Midlands, and the ease of links to Heathrow via the Elizabeth Line acting as the primary anchors for this.

© Imperial College

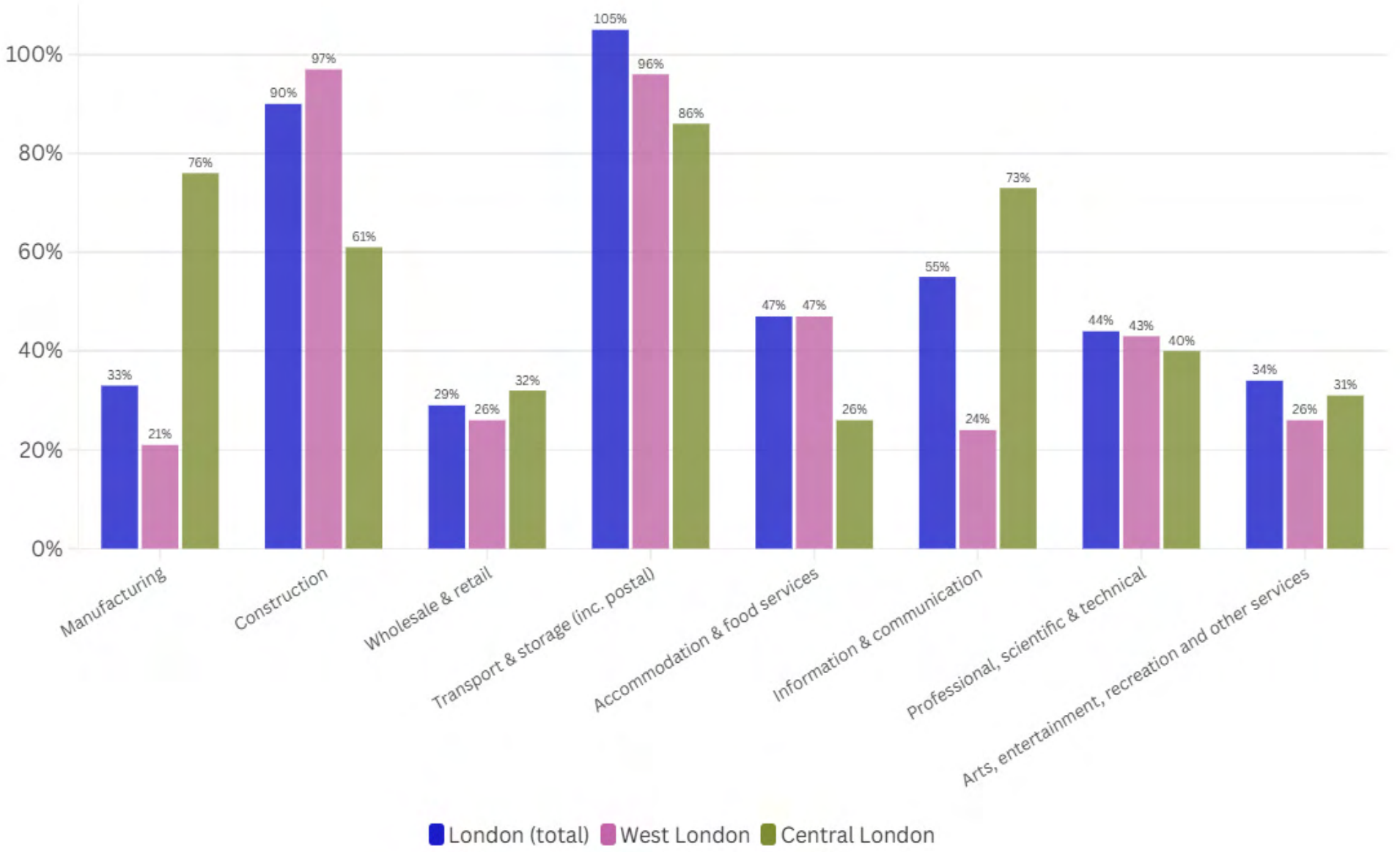
These positive trends are not restricted to the 'frontier economy', however. For example, West London's transport assets, including Heathrow Airport and motorway connections, have established the sub-region as a growth market for flexible, accessible and dense storage facilities. As a result, West London is home to a significant proportion of the capital's land used for logistics and storage space, at more than 298 hectares, equating to around 38% of London's total land use in this category.[28] This total increased by 20% between 2018 and 2022, accelerated partly by conversions under permitted development rights.[29]

One interviewee said the ability to "transform spaces to match market needs" was a "major benefit" for new industrial growth in West London, noting several locations in West London, including industrial estates in north Ealing, Southall and Hayes, where new developments have adapted to the business needs of SMEs, scale-ups and start-ups, including light industry and services uses. For example, new warehouses are increasingly designed to a higher specification than has been the case in the past, including to low carbon and green standards.[30] SEGRO and St George's innovative multistorey logistics hub at Grand Union is one example of this adaptability – a unique and pioneering design integrating logistics and residential space.

This is the bolder edge of how industrial land can adapt and is not always a viable option for development. However, more broadly, work programmes by West London Business, Imperial College London, Brunel University, SEGRO and others have taken an innovative approach to making industrial spaces multi-use, flexible and affordable, particularly to SMEs, start-ups and scale-ups. Ensuring that planning policy reflects this adaptability is crucial to facilitate the growth of new and emerging industries, while supporting foundational industries as the keystone of the sub-regional economy.

In the words of one interviewee, these recent trends in the business activity of the sub-region presents an "opportunity to be bold", suggesting that Central London may have "peaked" as a destination for growth sectors, presenting the opportunity for West London to "deliver the conditions to support smaller businesses, start-ups and scale-ups". Another interviewee suggested that business engagement at micro and SME level of enterprise is "essential to promote the frontier economy," noting that this is harder to achieve in Central London due to its established and intense concentration of major businesses and lack of affordable workspace.

Figure 6: London: Percentage change in the number of businesses by industry group, 2010-24



Source: Office for National Statistics (2024). UK Business: activity, size and location.[31]

Growth Area: The Great West Corridor

Creating the conditions for technology and creativity

Identified in 2018 as one of the Mayor of London's Opportunity Areas, the Great West Corridor is host to several major creative, digital and media companies, plus a well-established culture of engagement with local businesses and higher education institutions. Known as the 'Golden Mile', the Corridor runs from Osterley to Chiswick and includes corporate offices for companies such as SEGA, Paramount, CBS and Pokémon. Funding from the Mayor of London in 2018 enabled the creation of London's largest Creative Enterprise Zone in Hounslow, aimed at growing the local creative economy. Hounslow Council has since supported the Corridor's growth through the implementation of a Spatial Development Plan (SDP) for the Great West Corridor, with policies for affordable creative workspace and active travel improvements.

2025 is a significant year for the Great West Corridor in marking the centenary of the opening of the Great West Road in 1925. Its opening was the catalyst of a century of transformation for the formerly low-density Middlesex suburb into a corridor of manufacturing, creative and digital industries. The Corridor is an example of how West London's diverse industries have supported growth alongside community-led cultural assets and events, including the Creative Mile arts programme in Brentford, plus an emerging community of freelance, independent and SME cultural and retail businesses in Chiswick. To ensure the Great West Corridor remains a competitive, vibrant centre for creative industries, new planning policies through the London Plan and London Growth Plan should ensure spaces for creative industries are protected, affordable and flexible.

A creative industries powerhouse

West London has a strong heritage of supporting creative industries, particularly in film, television and digital & telecommunications, with the number of sub-regional businesses in this sector having increased by 24% between 2010-24 from 9,535 businesses to 11,800.[32] In terms of workforce estimates, Hounslow has had the most significant growth in this sector, increasing its employee numbers by 80% from 15,000 in 2010 to 27,000 in 2022.[33]

In the postwar period, the Ealing comedies, filmed at Ealing Studios at Ealing Green, were one of the sub-region's biggest cultural exports. The legacy of this successful film industry remains, with 50% of the capital's TV and broadcasting jobs based in West London, along with a significant population of TV and media production, film studios, and creative technology businesses.[34]

In addition, the sub-region's postwar manufacturing base and creative heritage facilitated the growth of telecommunications, digital and information industries across West London. These include technology multinational companies such as Sky, IMG Digital, Google and Cisco Systems. Initiatives such as West London Alliance's joint Digital West London programme have aimed to maximise fibre broadband and mobile connectivity, supporting tech, creative and indeed many other sectors across the sub-region.

Where the cross-pollination of industrial activity has had a positive effect on innovation industries in West London, creative industries have achieved the same effects for the sub-region's visitor economy. Destinations such as Wembley Park, Brent Cross and Earl's Court, plus five major sport stadiums, have benefitted from sub-regional access to a skilled creative workforce and base for future growth.

Generating fiscal dividends and rising prosperity

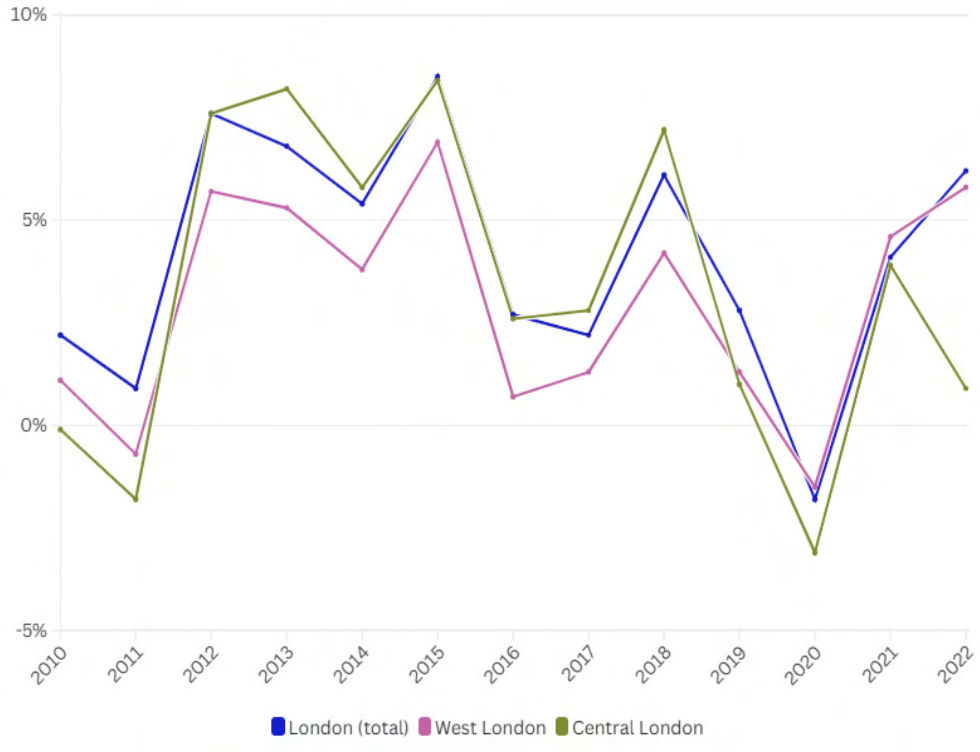
Innovation, business growth and economic activity are not ends in themselves. Importantly, there are signals that West London's economy is delivering rising prosperity, visible in tax receipts and household wage and income growth.

Greater London returned over £46bn in combined product tax income to the Exchequer in 2022, inclusive of VAT, stamp duty and excise duties.[35] Despite the CAZ's established role as London's economic heart, West London's contribution has closely matched Central London's since 2010, rising to £11.07bn in 2022 to Central London's £11.24bn.[36]

West London has also seen promising trends in the translation of economic activity into household prosperity, where West London employees have reaped greater benefits in terms of household income growth than those living in the centre of the city. Between 2010 and 2023, gross median pay increased in West London by 31% from £500 per week to £653.[37] In Central London, pay growth increased at a lower rate of 21% from £631 per week to £763. Similarly, median pay in West London increased at a faster rate than the Greater London average, rising 29% from £532 per week to £687.

Growth in prosperity relative to Central London can also be seen in recent trends in disposable household incomes. Where West London's growth rate has diverged dramatically from Central London's, rising by 8.9% between 2019 and 2022 compared to a decline of 8.4% for Central London.[38]

Figure 7: London: Percentage growth in disposable household income per head, 2010-22



Source: Office for National Statistics (2024). UK Business: activity, size and location.

While it is notable that this improvement in living standards is being felt by households in West London, and is occurring despite the ongoing dominance of Central London in terms of economic output, it is important to note that these trends are averages of the broader economic experience of households in West London. The impact of economic shocks and inequalities persist in the sub-region, where high housing costs, low earnings and challenges to living standards are often visible and stark.

These economic challenges have left a lasting impression on both the industries of West London and its residents. This is illustrated in polling by Savanta which shows 45% of West Londoners believe more focus should be placed on economic growth outside the centre of London, compared to 30% for Central Londoners.[39] This belief is not reciprocal however as 50% of people living in Central London believe the current focus of economic growth in the centre of London and areas outside the centre was about right, compared to 37% of West Londoners.

A more polycentric economic vision for the city that leans into dispersing opportunity and output across the city could lean into this trend and be both popular and, over time, reduce inequality.

Summary conclusions

West London's economy is large, diverse and increasingly competitive in frontier economy and high-growth sectors.

A thriving consumer economy with GVA greater than that of Birmingham and Manchester combined, it generates the same combined product taxes as Central London, and has returned greater prosperity than the centre in recent years in the form of household disposable income growth and higher growth in median pay.

An aspirant, competitive hub for frontier sectors over the last ten years, boosted by the economic advantage of Heathrow Airport and upcoming HS2 interchange at Old Oak Common, the sub-region has outpaced the centre in attracting and nurturing high-growth potential businesses in the professional, scientific and technical sectors, particularly for SMEs. New investment in prospects such as the WestTech Corridor and high-tech advanced manufacturing industries at Old Oak and Park Royal gives confidence in this trend continuing.

As such, West London could play a vital role in reigniting growth, not just for London but for the UK as a whole.

However, the sub-region faces challenges and constraints to unlocking this potential which we explore in the next chapter.

Case study: Greater Manchester

Devolution as a road to growth

As the UK's 'unofficial' second city, Greater Manchester has experienced high levels of foreign direct investment, urban regeneration and sectoral growth since the 2014 Greater Manchester Agreement, which established the Greater Manchester Combined Authority (GMCA). This trailblazer deal was deepened in March 2023 to include further levers for fiscal devolution, notably the ability for GMCA to retain 100% of its business rates. Ambitious local leaders and the densification of urban centres have led to Greater Manchester's regional economy seeing similar growth trends to Greater London.

The City of Manchester has the second largest student population outside London, with around 124,000 students and a regular turnover of graduates and international students. This has boosted Greater Manchester's employment growth for finance, digital and communications, manufacturing businesses, and public sector organisations. Annual job growth for the city region increased by 84% between 2002-15, capitalising on investment and at twice the rate of employment growth for the wider north of England. Similar to West London, Greater Manchester has a resilient real economy and good transport connectivity through the city region's newly enhanced tram and bus network. Growth sectors are largely located to the south of the region, anchored by the expansion of manufacturing, life sciences and digital & communications industries in Salford, Trafford and the City of Manchester. Overall, the region represents the largest regional economy outside of London and generates nearly £79bn in GVA for the UK economy.

Regional ambitions to maximise its 'trailblazer' status as a devolved combined authority has led to increasing programmes for spatial development, housing, and regeneration of the region's outer boroughs such as Bury, Wigan and Oldham. This long-term and sustainable vision for development was boosted by the adoption of the city region's development plan, Places for Everyone, in March 2024, which supports the delivery of new infrastructure, allocates sites for development, and identifies housing need. However, while central Manchester has experienced significant investment and growth, its development has not been without critics, with some local communities reporting feeling 'sidelined' by development. Indeed, one of Greater Manchester's constituent local authorities, Stockport Council, is not part of the region's spatial framework. In the context of West London, having a sub-regional spatial development plan, underpinned by increased amount of devolution, could generate a similar boom in economic growth through new, emerging business sectors while capitalising on existing foundational industries.

This long-term and sustainable vision for development was boosted by the adoption of the region's development plan, Places for Everyone, in March 2024 which supports the delivery of new infrastructure, allocates sites for development, and identifies housing need. A similar sub-regional spatial development plan for West London, supported by suitable devolved powers such as over business rates and skills policy, could generate a similar boom in economic growth through new, emerging business sectors while capitalising on existing foundational industries. Ensuring planning policy more widely is aligned with economic ambitions, while also reflecting the needs of local communities should form the basis of strategic development.

Chapter 2
Unlocking West London's economic potential

A strong skills base, but not currently translating into higher productivity

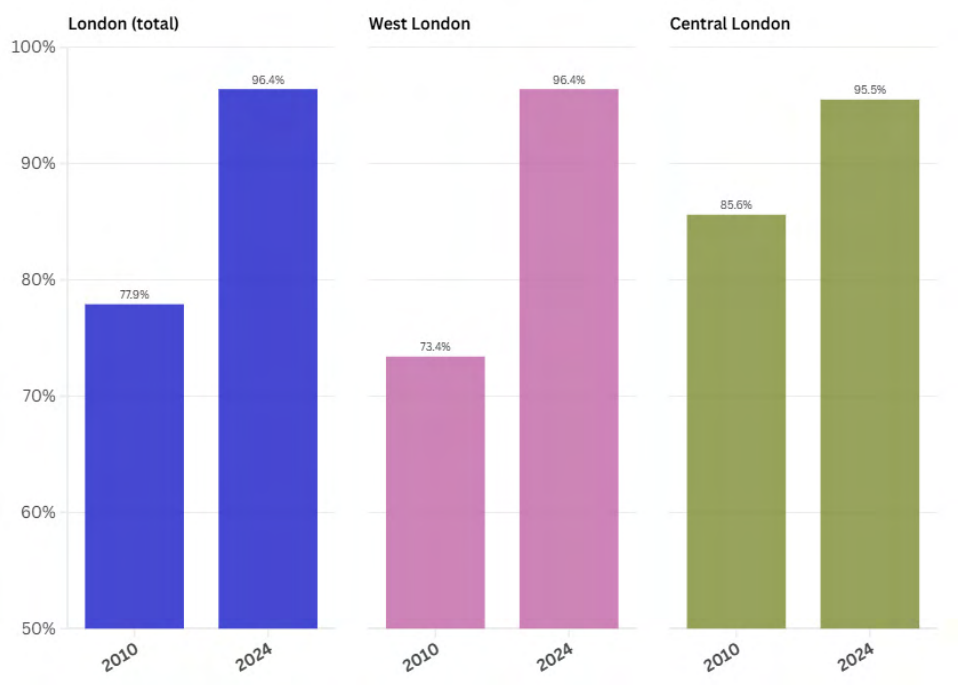
West London has a strong foundation in human capital development, thanks to a high-performing education sector. Despite this and the potential for productivity boosts offered by retaining skilled human capital, the sub-region has seen trends in productivity growth lagging behind even the weak growth seen in the rest of London.

The sub-region hosts seven university campuses, including Imperial College London, University of West London, Brunel University, Middlesex University, and Buckinghamshire New University. The higher education sector is evenly located across the sub-region, capitalising on local skills and talent and enabling engagement with high growth industries and business development in multiple boroughs. West London is also the base for four of the Mayor of London's Skills Academies which lead the delivery of skills hubs to create clear pathways to employment, with employers and further education providers delivering programmes on green skills, film and TV production, nursing, midwifery and health services, and social care.

As a further example of the sub-region's strong skills base, Imperial College's next phase of development at White City will expand the world-leading Innovation District to include new research and collaboration spaces. This will sit alongside its current provision as a centre for co-locating academic research with the sub-region's start-ups, scale-ups and other businesses.

At a primary and secondary level, West London's education system has also seen recent improvements, with the number of West London state schools overtaking Central London for schools assessed as 'Good' or 'Outstanding', having lagged behind in 2010.[40]

Figure 8: State schools funded good or outstanding, percentage total (2010-24)

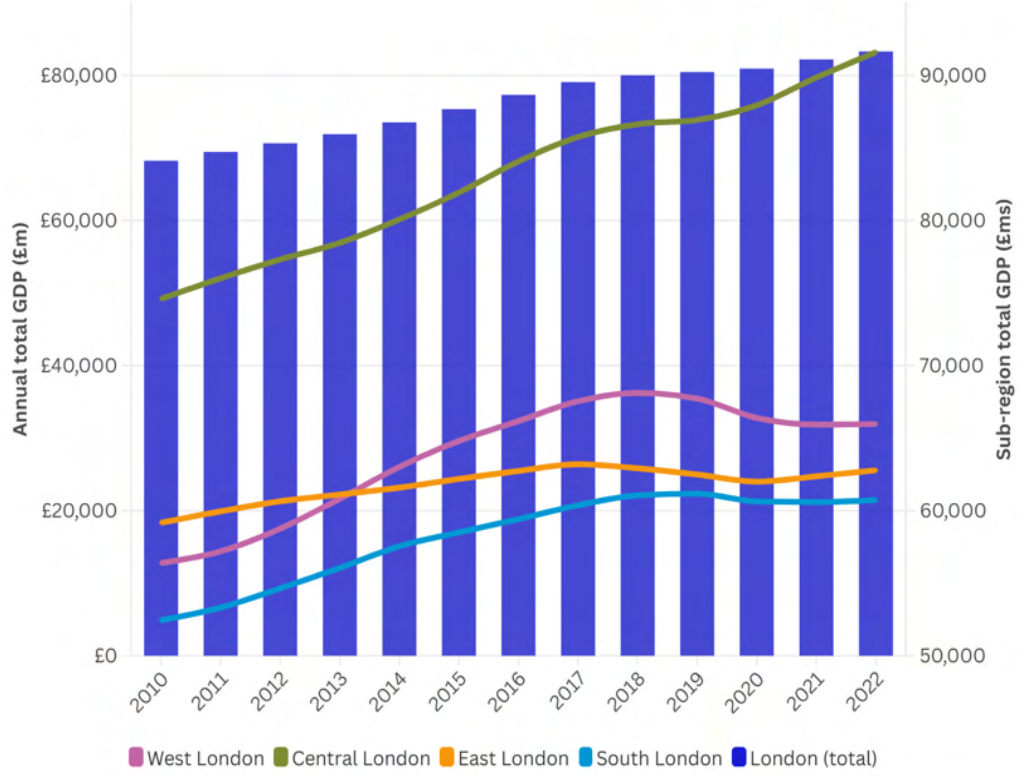


Source: Department for Education (2024). State-funded school inspections and outcomes: management information.

West London also has a higher output of students in further education (FE), apprenticeships and other adult skills qualifications. In 2018, 42,370 FE students achieved qualifications compared to 30,700 in Central London.[40]

West London also has a higher output of students in further education, apprenticeships and other adult skills qualifications. In 2018, 42,370 FE students achieved qualifications compared to 30,700 in Central London.[41]

Figure 9: Average GVA per filled job by sub-region, 2010-22



Source: Department for Education (2024). State-funded school inspections and outcomes: management information.

While these differences in educational outcomes are partially a function of West London's larger population, a larger pipeline of skilled workers should present a comparative economic advantage. It is notable, however, that despite this strong educational and skills performance, West London is currently not converting this into productivity gains in the workforce. This is symptomatic of structural inequality in London's economic model and also reflected in Census data where between 2011-21, West London was the only sub-region in the capital where the proportion of residents with no qualifications rose (by 0.7%).

In quantitative terms, West London's rate of growth for GVA per filled job is stagnating and has decreased in output to rates last experienced in 2016-17. Meanwhile Central London's output has continued to increase – even with the Covid-19 pandemic disrupting economic output. This diverging trend is also the case for GVA per hour worked. Overall, West London's GVA in total output has not recovered to its previous benchmark of over £75bn per annum recorded in 2019.[42] Furthermore, analysis of filled job indices, commonly referred to as a 'productivity index', shows West London's productivity has fallen 10.8% between 2010-22, compared to 6.4% for Central London.[43]

Furthermore, forthcoming research from Oxford Economics suggests that if each of West London's industry sectors performed at the sector average for London, West London would contribute an additional £7.3 billion per year in GVA to the economy. This would be a significant increase in economic output – as to put it in context, the output of Cambridge is estimated at £8.4 billion for 2024.

This disparity between achievement and productivity growth presents a challenge for policymakers, but also for employers to promote training and skills development in emerging growth sectors. This is especially pertinent when considering the higher proportion of West London's workforce employed in foundational sectors, where requirements for reskilling and upskilling workforces or for local skills programmes to reflect emerging sectoral needs are particularly salient.

Spacious, well-distributed and flexible industrial land is a significant asset, but its potential must be protected and harnessed

West London makes up 27% of the total land area of Greater London compared to 8% for Central London.[44] It is also home to a substantially larger population with over 2.1m people living in West London to 1.4m in Central London. As such, West London is significantly less dense than Central London. As of 2022, West London's non-developed land was just over 24,700 hectares compared to just 4,930 hectares in Central London.[45]

As such, West London has significant unrealised opportunity to maximise the use of land for high growth industries, residential development, and associated infrastructure and amenities.

It is, however, residential densification in particular that has accelerated in West London over the last ten years. Since 2011, the number of dwellings per hectare of land in West London increased by 16% compared to 12% for Central London.[46] This has been enabled by comparatively strong housing delivery. Between 2010-23, West London boroughs saw 115,531 homes completed, compared to 84,065 in Central London, comprising 25% of London's total completed housing stock in this period.[47] Within this, West London completed a higher number of affordable homes, delivering 32,862 additional dwellings for affordable tenure compared to 26,673 for Central London.[48]

While this strong housing delivery is certainly welcome in the context of London's dire housing crisis, one expert interviewee cautioned that "further densification" of this kind should also emphasise development of "strategic industrial land" to support economic growth, rather than "sacrificing key sites" to new housing developments. Another expert interviewee added that the future of development in West London "was not a simple question of choosing more homes or more warehouses, but a fair balance" to make the sub-region "a world-leading economic hub."

According to the GLA's Brownfield Land Register, out of 3,060 brownfield sites across the capital, 550 are found in West London with a combined land area of more than 977 hectares.[49] As a percentage of London's total brownfield land, West London makes up 38.5% of sites.[50] This presents an opportunity to maximise development and economic growth through the use of brownfield sites, particularly in the context of the Government's newly updated National Planning Policy Framework.[51] It should also contribute to wider economic growth strategies including the Government's Industrial Strategy and the London Growth Plan.

West London's rate of approvals for major planning applications for different development categories further reflects its potential to continue to grow as a hub for industry, transport and logistics developments. For example, between 2010 and June 2024, West London approved 219 major schemes for general industry, storage and warehousing. This is considerably greater than Central London, which approved 37 projects.[52] More generally, West London offers more commercial land than Central London across the majority of categories, offering strong roots for future growth. For example, West London's industrial land footprint in 2022 consisted of more than 131 hectares of dedicated space, while Central London's footprint was just 16 hectares, around 12% of West London's total.[53]

©West London Alliance

The value of this industrial land can be seen in West London's manufacturing base, producing broad range of goods including a well-established steel and plastics cluster, textiles, packaging, food and machinery production companies. The majority of West London's manufacturing is located on strategic or locally significant industrial land, as identified by the London Plan. These sites include North Feltham, Honeypot Lane in Stanmore, Wembley, Staples Corner, and the Hayes and Uxbridge industrial areas. The location of these sites in areas with direct access to the wider sub-region and beyond through major roads is vital to the success of industrial land in West London.

However, despite West London's manufacturing heritage and its importance as part of the sub-region's foundational economic growth, the sector faces decline and challenges from an increasing demand for land for other types of development. The West London manufacturing workforce declined by 3.8% from 39,000 people in 2010, which was then 31% of the total London manufacturing workforce.[54]

It is notable that, despite its relative abundance of developable land, there is a risk that the sub-region's industrial land is lost to other uses. High demand for industrial space and the significant demand for residential development, likely to be further heightened by the Government's new housing targets, further highlights the need for planning policy to support the sub-region's economic strengths and potential.

Growth area: Mixed use development at Old Oak and Park Royal

The UK's biggest brownfield regeneration site – a new hinge for London's industrial growth and development

As one of Europe's largest regeneration projects, the transformation of Old Oak and Park Royal represents a key pillar of growth potential for the boroughs of West London, the wider city, and UK as a whole. Set across 650 hectares in Ealing, Brent and Hammersmith and Fulham, the project was launched in 2015 by the Mayor of London, establishing the Old Oak and Park Royal Development Corporation (OPDC) as acting planning authority and development agency. Since 2015, OPDC has approved planning permissions for around 60 major projects across residential, industrial and commercial categories, with long-term targets to create 56,000 new jobs and deliver 25,500 new homes.

OPDC has been supported by strategic interventions from its constituent councils and the Greater London Authority, with the Mayor of London designating the district as an Opportunity Area with funding to establish a Creative Enterprise Zone and new Design District. OPDC's vision for regeneration was stimulated further in June 2022 with the adoption of the statutory Local Plan.

At the centre of the OPDC area lies an unparalleled benefit for West London residents: the delivery of the High Speed 2 rail terminal at Old Oak Common. The importance of the station for West London's growth has, disappointingly, been understated by national government following the Conservative Government's decision to cancel the HS2 line construction to Manchester in October 2023. However, Old Oak will be a destination in its own right, and following the confirmation in the 2024 Budget from Chancellor Rachel Reeves that the Government will financially support HS2's link from Old Oak Common to Euston Station, the OPDC area represents an even greater opportunity as one of the anchors for West London's local councils and businesses to plan for growth.

The regeneration of the OPDC area is being spearheaded by the GLA and local partners to protect vital industrial space while maximising the number of homes that can be delivered. Located on the 650 hectare site are 50 of West London's 550 brownfield sites with high potential to redevelop in line with the sub-region's emerging growth sectors. The district is creating a base for larger industries to scale up and grow, benefitting from transport connections at Old Oak Common station, Heathrow Airport, the M1 and M4 motorways, as well as the financial primacy of Central London. The OPDC area can provide a well-connected site for innovative, green and high-tech manufacturing and a crucial base for new and emerging industries. The district's existing strengths and heritage in industrial and manufacturing, including a substantial population of food manufacturing businesses and an emerging heat network, emphasise the need for and the potential opportunities arising from strategic planning and development.

As a reflection of the area's strategic importance, in November 2024, Imperial College London announced new investment into a prime industrial site in Old Oak from logistics developer SEGRO, aimed at driving the development of flexible and affordable spaces for new science and innovation projects, as well as accommodating start-ups and scale-ups.

Energy and transport infrastructure constraints could hamper growth and limit opportunity

A major barrier to West London's future development is electrical capacity. In June 2022, the GLA began a series of short-to-medium term programmes to improve power network capacity development in Ealing, Hounslow and Hillingdon.[55] These programmes have been coordinated and implemented with Distribution Network Operators, including Scottish and Southern Electricity Networks (SSEN) to unlock capacity for new developments and reduce the impact of rapid growth in new high-demand operators, particularly data centres and commercial buildings.

West London boroughs have worked with the GLA and network operators to develop a Local Area Energy Plan[56], aimed at finding pragmatic and deliverable solutions to unlock capacity. While this has already unblocked the development of thousands of new homes, the scale of this challenge has meant that there is a pressing need for further network capacity in the medium term. Local authorities, the GLA, business groups and other partners have prioritised addressing this to ensure that proposals for new homes, commercial premises and industrial units can be brought forward and enter the development pipeline. Analysis of land affected by electrical capacity shortages in the SSEN operating area of West London shows that as many as 192 brownfield sites may be at risk of delays without further action, including all 50 brownfield sites within the OPDC boundary.[57]

In terms of transport infrastructure, West London is well-connected. The M1 and M4 motorways and major A-roads, including the A406 North Circular, are also significant enablers of economic activity, particularly for the sub-region's heavier industries and logistics businesses. Access to major roads and highways is vital to the economic success of West London's foundational industries, growth sectors and the frontier economy.

It is also served by a largely radial network of rail lines suited to suburbanite commuting into Central London. The seven boroughs are host to 128 rail and Tube stations operated by eight transport companies. The busiest Tube station, Hammersmith, recorded nearly 29 million passenger entries and exits in 2023,[58] while the completion of the Elizabeth line has generated significant connectivity for suburban stations in West London. The sub-region is served by 284 of Transport for London's 675 bus routes, meaning 42% of London's bus routes operate in West London, connecting to nine local authority areas outside Greater London.

However, despite this high number of connections, parts of the sub-region are isolated from its multiple centres of economic activity, limiting agglomeration of intraregional economic activity.

Unlike Central London, there is limited interborough connectivity in West London, especially for public transport and active travel routes. For example, a series of low-density settlements based along the Uxbridge Road (A4020) are particularly isolated from rail connections including centres such as Belmore, Hayes End and Hillingdon Town. Further north, town centres at Pinner, Harrow Town and Edgware lack the same level of interconnectivity as other economic centres in the sub-region. This increases pressure on routes such as the North Circular, which at points along its route is one of the most congested roads in the entire country.

Public transport travel times highlights these discrepancies in integration between West London's centres.[59] For example, the fastest rail route between Southall and Pinner, despite being seven miles away by road, requires travelling double the distance via Central London and changing twice.

Proposed orbital rail routes such as the West London Orbital, Southall, and Heathrow rail link lines could reduce these journey times and provide better interborough access. The West London Orbital, for example, would cut journey times substantially through better interconnectivity, including a 57% reduced average journey time for orbital travel between Brentford and Neasden.[60] However, as it stands, West Londoners looking to take advantage of the sub-region's multiple areas of economic opportunity must rely largely on road transport or take their skills elsewhere, via a transport network that functions largely to channel commuters and visitors to the centre of London. Improving rail infrastructure in this way would also contribute to reduced road congestion, which in turn would allow West London's businesses, particularly those requiring access to main roads, to operate more smoothly and with less disruption.

Case study: Metro Manila
Facilitating business cluster growth through central planning

Metro Manila, capital of the Philippines, is the sixth densest urban region in the world with a total population of 14,942,000 people. Since the People Power revolution in 1985-86, Metro Manila has rapidly grown into one of the world's fastest growing economic centres and pre-eminent locations for commerce, finance and banking in South East Asia. The region is constituted by 17 local authorities including Manila proper, Quezon City and Taguig, which have a more disconnected approach to planning and development than UK local authorities. In Metro Manila, planning policy is largely managed on a regional basis by the Metropolitan Manila Development Agency, which is accountable both locally and directly to the President of the Philippines.

Metro Manila is home to more than 30 Central Business Districts which are strategically planned to maximise inclusive growth, while seeing a far greater level of involvement from private sector businesses. These districts are highly urbanised and operate through an effective integrated public transport system, connecting districts to residential areas and to the wider region. Examples of these districts include financial services powerhouse Makati Central, retail district Ortigas and Filinvest, which focuses on health and wellbeing.

There have been clear benefits to this model from a governance and economic perspective. At a baseline, Metro Manila's economic growth since 2000 has been double that (nearly 10%) of the whole Philippine economy. Specialisation of districts has enabled public and private investment to be more strategic and focused on sector outcomes, as well as promoting investor incentives and competitiveness for different markets. This includes foundational industries in the outer suburban districts which host major logistics hubs for Metro Manila's thriving economy.

The region's polycentric model has benefitted from a strategic, regional approach to development where commercial sectors have direct involvement in decision making processes. But in its rapid growth, Metro Manila has deep, persistent inequalities. Across the region approximately 500,000 people live in slums. Investment into sanitation, waste and water infrastructure since the 1990s has aided the region's expansion and improved living standards but significant gaps in access to amenities remain, including digital and communications networks.

The rapid growth of Metro Manila is an example of where urbanisation has delivered thriving economic centres, at the risk of leaving communities without adequate basics. In comparison to West London, Metro Manila's polycentric model has delivered strategic development to support growth in high-growth sectors. However, it also shows the clear need for a strong culture of anchor institutions, cooperative working and a shared vision to take polycentrism forward while representing the needs of residents and businesses.

Conclusion and Recommendations

Conclusion

London's economic geography has been shaped over recent decades by policies which drive economic activity to the centre of the city, with the result that output is concentrated in a small number of districts.

Today, however, this economic model is faltering, with significant implications for the city and its sub-regions. London's economy faces stagnating productivity and high inequality which diminishes its prosperity and harms Londoners' quality of life, while reducing the capital's competitiveness as a global economic centre.

As a sub-region, West London is far from immune to these city-wide trends, with productivity declining more steeply than other sub-regions and growth rates yet to recover to pre-pandemic levels.

This is despite the sub-region's substantial economic role and latent potential. West London is the global doorstep to London and the UK via Heathrow, the base for London's creative and manufacturing heartlands, and, in recent years, an aspirant hub for high-growth industries with a resilient foundational economy. West London's economy has benefitted both West Londoners who have seen rising disposable incomes, and the Exchequer which receives substantial tax revenues from the sub-region's combined product taxes.

However, West London faces constraints on its growth potential. Despite a strong base in human capital development seen in the sub-region's competitive skills achievements and high-performing education sector, West London currently lacks the powers and funding to convert this into higher productivity through a fully-fledged regional and sub-regional skills and employment strategy.

Further, an established radial transport network and the outsized role of Heathrow as the UK's largest port gives the sub-region strategic national and regional economic importance.

However, the future for orbital infrastructure improvements such as the West London Orbital, Southall and Heathrow link rail lines remain uncertain, limiting opportunities for agglomeration of economic activity within the sub-region. Restrictions for electricity transmission and distribution grids also act as major blocker for commercial and residential development.

These interlinked issues of a stagnating city-wide economy and a sub-region unable to lean into its economic potential points to the need for a rethink of London's economic model.

A shift in approach that seeks explicitly to harness the potential of London's sub-regions outside central London, and reconnects with London's past as a polycentric city characterised by multiple interdependent hubs of economic activity, could be transformative, spreading economic opportunity and the benefits of growth more evenly across the city.

Polling by Savanta for Centre for London's What London Thinks programme suggests that West London residents in particular are ready for such an agenda, with high support for devolution and regional government. West Londoners have the highest level of trust in regional government of all London's sub-regions, with 26% trusting the Greater London Authority and Mayor and 45% supportive of devolving taxation and public spending to local government – the highest any London sub-region.[61]

Based on this report's analysis of West London's economic opportunities and potential, we set out a number of recommendations on how such a shift to a more inclusive, resilient and higher-growth economy grounded in London's polycentric economic heritage could begin:

Recommendations for national government

1. National government should go further and deeper with its current legislative programme for devolution to enable local and regional government to drive growth.

The English Devolution White Paper sets out bold and historic proposals for reorganising local government. London and its four sub-regions outside the centre must also benefit from this, including the implementation of flexible, integrated, multi-year settlements for main budgets, housing and transport policy streams. As London's devolution settlement marks its 25th year, there is appetite and urgency to review the capital's devolved powers and responsibilities. But a renewed settlement for London, with responsibilities as highlighted by the Government's English Devolution White Paper, will require robust mechanisms for shared decision-making mechanisms between the GLA, sub-regions and boroughs. A failure to do so could exacerbate the trend of economic centralisation and represent a missed opportunity to drive growth in London's sub-regions.

The Government should also go further in its devolution plans and introduce fiscal devolution that ensures that London retains a higher share of tax revenues, allowing it to reinvest in good incentives for growth and productivity across the city through the tax system. This should include reviewing the share of business rates London is able to retain and redistribute between boroughs. As part of the more structured approach to devolution set out in the Government's White Paper, the rate of retention and its potential to enable broader growth across London should be re-considered carefully, and the allocation and investment of London's retained business rates should be developed in partnership between the GLA, boroughs and sub-regions to deliver a more regionally strategic approach to reinvestment. This would also include the ability to set suitable flexibilities and incentives that support new businesses to start up, fledgling businesses to scale up and international businesses to relocate to London. In particular, measures would support significant industries such as life sciences, high-tech and advanced manufacturing, creative industries, and the green economy.

2. The Government should expand its proposals for devolution of skills, employment and training policy to London's local government.

The Government's Get Britain Working White Paper is a positive step to driving better local employment outcomes through reforms to job centres, youth employment policy and the Apprenticeship Levy. However, for this to have maximum impact on growth, the Government should devolve the full fiscal responsibilities of skills and employment policy to the GLA and sub-regions, including the implementation of the Apprenticeship Levy.

Once devolved, sub-regional partnerships should take on responsibility for setting local skills policy, enabling the development of flexible, area-tailored, long-term term skills plans that are well-integrated with the sub-region's overall economic vision and ensure a pipeline of suitably skilled workers for future employment needs. The trailblazers announced as part of the Get Britain Working White Paper are a good starting point, and the Government should look at what more can be done to devolve greater control and responsibility to sub-regions.

To further respond to the potential skills demand from West London's emerging and established high-growth sectors, national government should enable West London to harness the human capital engine of its thriving higher education institutions. Government should extend the terms of the Graduate Visa from two to five years and reduce the costs of applying for Skilled Work Visas.

3. West London's industrial and commercial land is fundamental to its economic role and potential, and the Government's planning policy reforms should recognise, protect and enhance this.

The Government's new definition of low quality 'grey belt' land should protect commercial and industrial land and prioritise their use for employment spaces. This would ensure that the economic potential in London's industrial heartland is protected, enhanced and intensified. In the case of West London, with its higher concentration of significant industrial and commercial land, the grey belt definition should be adapted to be more flexible so strategic protections remain.

The Government should review the current regime for permitted development rights which currently risks loss of key employment space in West London's town centres. Where vacant employment space in town centres exists, the Government's reforms for high street auctions should ensure that viable commercial bids are considered first and foremost. This is especially important for offices, retail and light industrial buildings in or close to town centres.

4. The Government must prioritise tackling West London's electricity capacity constraints to ensure that industrial and commercial developments, as well as residential, can be delivered at pace.

West London faces a significant and immediate pressure on development, both in commercial and residential terms, from its restrictions for electricity transmission and distribution grids. Beyond its medium-term reforms to decarbonise the grid, reform the connections queue and speed up consenting, the Government must urgently work with power network operators, the GLA and West London boroughs and businesses to accelerate upgrades and invest in new infrastructure. If necessary, this could be achieved through different models outside the conventional regulatory asset base financing model. This is essential to protect the sub-region's pipeline for growth, especially in delivering critical infrastructure for frontier economy businesses such as data centres.

5. The Government should invest resources to expand and enhance West London's transport network, including new orbital connectivity to encourage intra-regional economic activity.

The Department for Transport should not see West London's transport network as a 'done deal.' It is encouraging that the Mayor of London is working with TfL and the Government to agree a long-term capital investment settlement. This should ensure that any future settlement is ambitious, flexible and viable for delivering a mixture of capital investment projects, including for enhancing the road network. This would also grant TfL greater ability to improve the reliability, speed and frequency of services in West London, protecting and enhancing its strategically important transport infrastructure.

To capitalise on the opportunity for greater connectivity at Old Oak, it is crucial that the new transport hub is designed to be future-proof. It must accommodate the West London Orbital and other potential overground connections, beyond the High Speed 2, Elizabeth Line and Great Western Main Line connection. The Government should ensure that Old Oak Common will operate as an interchange for services on the Great West Main Line towards Bristol, as well as exploring its viability as an interchange for Chiltern Main Line services towards Birmingham.

Recommendations for regional government

1. *The London Growth Plan is an opportunity to shape the nature and distribution of economic growth in London. This should include greater emphasis on capitalising on the unique economic strengths of London's sub-region to accelerate and more evenly distribute economic growth city-wide.*

The West London Alliance has demonstrated the potential of strategic sub-regional partnerships to develop and implement a sub-regional economic vision. But without the ability to fulfil this vision through more resilient council finances and more devolved responsibilities, West London is constrained by what it can achieve. The GLA should recognise this and ensure that the economic visions of London's strategic sub-regional partnerships are integrated into the London Growth Plan, which are then responsible as accountable governing bodies to implement and coordinate economic policy at a local level. For West London's economy to thrive and prosper as part of a wider city region, it is crucial that sub-regional partnerships have greater autonomy to design and implement locally-delivered policies and projects, representing the priorities of their boroughs while ensuring alignment with pan-London strategies. This includes skills and employment policy, sub-regional planning and development, transport, and economic development.

Furthermore, the GLA should collaborate more closely with London's sub-regional partnerships and tailor new initiatives to sub-regions' unique strengths. For example, the London Growth Plan should enhance the definition of Opportunity Areas to be more holistic to allow for greater sub-regional specificity – for example, taking advantage of any prospective fiscal devolution to consider how measures such as tax reliefs can be deployed sub-regionally to attract investment in areas outside the Central Activities Zone. This would give Opportunity Areas further prospects for investment beyond planning designations.

2. *The next London Plan presents a crucial opportunity to leverage the potential of West London's economy by protecting, intensifying and expanding its unique industrial and commercial assets to boost growth and employment.*

The next London Plan will likely (and correctly) prioritise residential development, but this should not displace much-needed investment to develop West London's strategically significant commercial and industrial land. To ensure there is a clear focus towards boosting the economy alongside delivering new housing, the GLA should explore the implementation of a 'spatial jobs target' – equivalent of housing targets – which quantifies and sets a target for the number of potential jobs it proposes to create through new development in London boroughs. This process should resemble the Strategic Housing Land Availability Assessment (SHLAA) carried out as part of Local Plan review, but with consideration for developing land for employment uses.

This new spatial jobs target would deepen the link between planning, development and the economy. They should be developed in close collaboration with sub-regions to ensure targets are ambitious, reflective of local economic growth potential. and aligned with jobs growth goals set out in the London Growth Plan. As part of this new target, the GLA should also explore mechanisms that could further enable jobs-led development, such as using the planning system to fast-track projects with prospects for high employment.

Further to this, the next London Plan should continue the existing commitment of no net loss of industrial land, and should not release any Strategic Industrial Land or Locally Significant Industrial Land from the existing planning map. This should also extend to land designated for commercial uses, including retail, offices and light industry. Where viable, the London Plan should also recognise the need for West London's industrial land to be intensified and expanded. Once developed and commercially successful, this land should then benefit from the same consequent protections for SIL and LSIL land to maximise the sub-region's economic potential, through a lasting change to West London's planning map.

Where spatial challenges arise through a loss of viable land for investment, either for industrial or residential uses, the Mayor of London and boroughs should explore the potential for other methods of development, including densification, development corporations, uses of fiscal powers such as tax reliefs in specific districts, or considering proposals for a New Town in Outer London or outside the Greater London boundary in the wider South East. Mechanisms in the London Plan for the alignment of London's policy and delivery with that of neighbours in the wider South East should be strengthened, including for the emergence of new cross-boundary developments and infrastructure.

To best guide and co-ordinate industrial and commercial land development, the new London Plan should implement London-wide supplementary planning guidance for protecting, enhancing and expanding industrial land in key districts. This should protect the ability of developers in West London to flexibly convert, retrofit or adapt sites to new occupiers' needs. This ensures that developments can remain an economic and employment asset to the sub-region and wider economy while adapting to changing business trends and environmental needs.

This new guidance should also reflect West London's economic potential through the sub-region being designated as a new Western Activities Zone, with the same model for planning and development as the Central Activities Zone. Coordinating policy changes for this Western Activities Zone should be the responsibility of the West London Alliance and its boroughs, with similar responsibilities offered to the other sub-regional partnerships.

The new London Plan should reflect West London's unique character as an economic engine by enabling sub-regional coordination of permitted development rights and, in the case of West London, introduce appropriate limits on the conversion of offices, light industry and other commercial to residential.

Finally, the Mayor of London has the opportunity to accelerate London's future economy through the ongoing development of the WestTech Corridor, conceived by Imperial College London and now championed and catalysed by a number of strategic stakeholders, including West London boroughs and the OPDC. The next London Plan should therefore implement protections for strategic industrial land developed as part of the WestTech Corridor to ensure its industrial assets and spaces are not lost to other land uses.

3. Greater transport connectivity is essential for West London's economic development. Transport for London should further expand its investment, maintenance and development portfolio in West London to drive growth.

West London's economic strengths lie in its major transport assets. The Mayor of London and TfL should use West London's transport assets as beacons for investment into the sub-region and wider economy, while deploying capital investment through its agreed long-term settlement. This should involve exploring how capital funding can be best deployed but also in attracting private investment for commercial and industrial land around assets such as Old Oak Common station, Heathrow Airport, and motorway interchanges at Brent Cross and Chiswick.

TfL should reinstate its sub-regional transport planning programmes and work with sub-regional partnerships like West London Alliance to steer the design, scope, governance and development of their remit. These programmes should be designed to facilitate improvements to integrated public transport services in each sub-region, co-led by local leaders and supported by TfL. This renewed approach to sub-regional transport planning should also be enhanced to co-design and implement policies for improving road connectivity, congestion and traffic management. This will ensure that local stakeholders are more strongly involved in the development of roads and highways policy, which in the case of West London, is crucial to its economic growth.

In addition, and rooted in a more stable long-term funding settlement with Government, TfL and the Mayor of London should commit to investing in and delivering key, strategic orbital transport networks in West London to unlock economic opportunities across the sub-region. This includes exploring how capital investment can be deployed to support better road interconnectivity and new opportunities for orbital bus routes across West London, utilising insights from West London's major employers to guide the prioritisation of new or enhanced routes. For rail, this principle should include the funding and delivery of the West London Orbital, Heathrow link routes, the Southall line, and investing in the capacity and reliability of national and Transport for London rail services at the Old Oak Common interchange.

4. Old Oak and Park Royal Development Corporation is London's biggest opportunity for commercial development since the regeneration of the East London Docklands. It is essential that the development is championed as a central economic district in London's industrial heartland.

The Old Oak and Park Royal Development Corporation's emerging economic vision, once confirmed, should be integrated as a key part of the next London Plan and the London Growth Plan. This will enable a long-term, secure future for commercial and industrial redevelopment in West London, championing Old Oak and Park Royal as a central economic district in London's industrial heartland.

The next London Plan should implement a policy of 'jobs-first' redevelopment for Old Oak and Park Royal, to maximise the existing land for commercial and industrial use. This does not undermine the role of the development corporation for building new homes but ensures London and the wider UK economy benefits from the district's integral strengths as a well-connected economic centre.

The OPDC is an opportunity to attract pioneer industries and investment in growth sectors. This includes supporting high-growth innovation typologies and intensified industrial uses for science manufacturing. Functional design of Old Oak and Park Royal should maximise viability for investment and businesses, ensuring new developments in the district contain affordable spaces which are delivered to maximise the innovation ecosystem in West London. This is especially crucial for ensuring West London remains an engine of growth for SMEs, start-ups and scale-ups.

To ensure this, the GLA should work with local stakeholders, including Imperial College London and the private sector, to ensure that future planning policy reflects the spatial and infrastructure needs of this high growth cluster in West London.

Endnotes

1. Centre for London (2020). London at a crossroads. https://centreforlondon.org/reader/london-crossroads/londons-economy-business/#growth-resilience-and-specialisation

2. Greater London Authority (2020). London's Economic Relationship with the Rest of the UK. https://www.london.gov.uk/sites/default/files/londons_economic_relationship_with_the_rest_of_the_uk.pdf

3. London Chamber of Commerce and Industry (2024). London's Economy: A local authority level analysis. https://www.londonchamber.co.uk/LCCI_Media/LCCI/Media/Reports/London-s-Economy-Summary.pdf

4. London Property Alliance (2024). Good Growth in Central London. https://www.londonpropertyalliance.com/wp-content/uploads/V5_CLPA21_Good_Growth_London.pdf

5. Ibid.

6. Martin, R. & Sunley, P. (2023). Capitalism divided? London, financialisation and the UK's spatially unbalanced economy. https://www.tandfonline.com/doi/full/10.1080/21582041.2023.2217655

7. Centre for London (2024). Rebooting London's economy. https://centreforlondon.org/project/rebooting-londons-economy/

8. Trust for London. London's poverty profile: income inequality. https://trustforlondon.org.uk/data/income-inequality-over-time/

9. Martin, R. (2024). Unpacking London's productivity problem. https://www.bennettinstitute.cam.ac.uk/blog/unpacking-londons-productivity-problem/

10. Cabrera-Arnau, C. et al. (2023). Inferring urban polycentricity from the variability in human mobility patterns. https://www.nature.com/articles/s41598-023-33003-7

11. Lin, D. et al. (2018). The Effects of Polycentric Development on Commuting Patterns in Metropolitan Areas. Regional Studies Association. https://www.regionalstudies.org/wp-content/uploads/2018/07/Dong_Lins_Final_Paper_for_RSA_Beijing_Global_Conference_of.pdf

12. David, Q. & Kilani, M. (2022). Transport policies in polycentric cities. https://ideas.repec.org/a/eee/transa/v166y2022icp101-117.html

13. Zhang, L. & Zhang, L. (2022). Evaluation of Urban Spatial Growth Performance from the Perspective of a Polycentric City: A Case Study of Hangzhou. https://www.mdpi.com/2073-445X/11/8/1173

14. London Transport Museum. What is Metro-land? https://www.ltmuseum.co.uk/collections/stories/transport/metro-land

15. Ministry of Housing, Communities and Local Government (2022). Land use in England, 2022. https://www.gov.uk/government/statistics/land-use-in-england-2022/land-use-statistics-england-2022

16. The secondary sector typically consists of processing, manufacturing, and construction companies. The tertiary sector is typically comprised of companies that provide services, such as retailers, arts & entertainment, hospitality, education, medical providers, and financial organisations.

17. West London Alliance (2024). Industrial Strategy Green Paper 'Invest 2035' West London Response. https://wla.london/wp-content/uploads/2024/11/FINAL-Industrial-Strategy-Green-Paper-West-London-response-Nov24.pdf

18. Oxford Economics (2024). The Economic and Social Impact of Heathrow Airport. https://www.heathrowstrategicplanninggroup.com/download_file/force/162/184

19. Office for National Statistics (2024). Regional gross domestic product: local authorities. https://www.ons.gov.uk/economy/grossdomesticproductgdp/datasets/regionalgrossdomesticproductlocalauthorities

20. Office for National Statistics (2024). UK Business: activity, size and location. https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/datasets/ukbusinessactivitysizeandlocation

21. Greater London Authority (2024). Borough by sector employee jobs. https://data.london.gov.uk/dataset/borough-by-sector-employee-jobs

22. Office for National Statistics (1998). Size Analysis of United Kingdom Businesses: Data for 1998. https://webarchive.nationalarchives.gov.uk/ukgwa/20151013215902/http:/www.ons.gov.uk/ons/rel/bus-register/uk-business/1998/index.html

23. Office for National Statistics (2024). UK Business: activity, size and location. https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/datasets/ukbusinessactivitysizeandlocation

24. Greater London Authority (2024). Borough by sector employee jobs. https://data.london.gov.uk/dataset/borough-by-sector-employee-jobs

25. Office for National Statistics (2024). UK Business: activity, size and location. https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/datasets/ukbusinessactivitysizeandlocation

26. Greater London Authority (2024). Borough by sector employee jobs. https://data.london.gov.uk/dataset/borough-by-sector-employee-jobs

27. Ibid.

28. Ministry of Housing, Communities and Local Government (2022). Land use statistics: England, 2022. https://www.gov.uk/government/statistics/land-use-in-england-2022/land-use-statistics-england-2022

29. Ibid.

30. JLL (2022). Do warehouses need green certifications?. https://www.jll.co.uk/en/trends-and-insights/cities/podcast-do-warehouses-need-green-certifications

31. Office for National Statistics (2024). UK Business: activity, size and location. https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/datasets/ukbusinessactivitysizeandlocation

32. Office for National Statistics (2024). UK Business: activity, size and location. https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/datasets/ukbusinessactivitysizeandlocation

33. Office for National Statistics (2024). EMP13: Employment by industry. https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/datasets/employmentbyindustryemp13

34. Champness, S. (2023). Analysis of the Local Economic Benefits of Film and TV Studios in West London. https://westlondon.com/wp-content/uploads/2023/11/West-London-Film-Studio-Studio-Supply-Chain-Economic-Study-final-.pdf

35. Office for National Statistics (2024). Regional gross domestic product: local authorities. https://www.ons.gov.uk/economy/grossdomesticproductgdp/datasets/regionalgrossdomesticproductlocalauthorities

36. Ibid.

37. Office for National Statistics (2024). Employee earnings in the UK: 2024. https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours/bulletins/annualsurveyofhoursandearnings/2024

38. Office for National Statistics (2024). Regional gross disposable household income, UK: 1997 to 2022. https://www.ons.gov.uk/economy/regionalaccounts/grossdisposablehouseholdincome/bulletins/regionalgrossdisposablehouseholdincomegdhi/1997to2022

39. Savanta (2024). What London Thinks.

40. Department for Education (2024). State-funded school inspections and outcomes: management information. https://www.gov.uk/government/statistical-data-sets/monthly-management-information-ofsteds-school-inspections-outcomes

41. Department for Education (2024). Further education and skills dataset: Geography Region, LAD, EDA - Participation, Achievement by Age, Sex, Ethnicity, 2018-19 to 2022-23. https://explore-education-statistics.service.gov.uk/data-catalogue/data-set/be9be4b4-faca-4487-aeda-5ae18525ba4c

42. Office for National Statistics (2024). Subregional productivity: labour productivity indices by UK ITL2 and ITL3 subregions. https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/labourproductivity/datasets/

43. Ibid.

44. Office for National Statistics (2022). Standard Area Measurements for Administrative Areas in the UK. https://geoportal.statistics.gov.uk/datasets/235c70d40c494361bd6b0ddaebdf0bad/

45. Ministry of Housing, Communities and Local Government (2022). Official Statistics: Land use in England, 2022. https://www.gov.uk/government/statistics/land-use-in-england-2022/land-use-statistics-england-2022

46. Ministry of Housing, Communities and Local Government (2024). Live tables on dwelling stock (including vacants): dwelling stock density estimates by local authority district. https://www.gov.uk/government/statistical-data-sets/live-tables-on-dwelling-stock-including-vacants

47. Ibid.

48. Ibid.

49. Greater London Authority (2024). Planning Constraints Map and Data. https://apps.london.gov.uk/planning/

50. Greater London Authority (2022). Brownfield Register. https://data.london.gov.uk/dataset/brownfield_register

51. Ministry of Housing, Communities and Local Government (2024). National Planning Policy Framework. https://www.gov.uk/government/publications/national-planning-policy-framework--2

52. Ministry of Housing, Communities and Local Government (2024). Live tables on planning application statistics; District planning application statistics (PS2). https://www.gov.uk/government/statistical-data-sets/live-tables-on-planning-application-statistics; https://www.gov.uk/government/statistical-data-sets/live-tables-on-planning-application-statistics

53. Ministry of Housing, Communities and Local Government (2022). Land use statistics: England, 2022. https://www.gov.uk/government/statistics/land-use-in-england-2022/land-use-statistics-england-2022

54. Greater London Authority (2024). Borough by sector employee jobs. https://data.london.gov.uk/dataset/borough-by-sector-employee-jobs

55. Greater London Authority (2022). West London electricity capacity constraints. https://www.london.gov.uk/programmes-strategies/better-infrastructure/infrastructure-coordination/development-service/west-london-electricity-capacity-constraints

56. West London Alliance (2024). Shaping West London's energy future. https://wla.london/wla-press-release-on-energy/

57. Greater London Authority (2022). Brownfield Register. https://data.london.gov.uk/dataset/brownfield_register

58. Transport for London (2023). All TfL Station Entries and Exits, 2018-23. https://tfl.gov.uk/corporate/transparency/freedom-of-information/foi-request-detail?referenceId=FOI-0590-2324

59. Journey times calculated using Transport for London's Journey Planner feature.

60. West London Alliance (2024). The West London Orbital: Connecting West London. https://wla.london/wp-content/uploads/2024/11/11242_WLA_Report_V8.pdf

61. Savanta (2024). What London Thinks.

Published by:
Centre for London 2024

House of Sport,
190 Great Dover St,
London SE1 4YB
T: 020 3757 5555
hello@centreforlondon.org
centreforlondon.org
Company Number: 8414909
Charity Number: 1151435

About Centre for London

London faces complex and evolving challenges.
We develop policy solutions to tackle them.
Help us make London better for everyone.

We are London's independent think tank. We are uniquely dedicated to developing new solutions to our city's challenges, for the benefit of all its people. We help policymakers and city leaders think for the long term about London's biggest issues and plan for a better future. We do this through:

Research and evidence: conducting robust, unbiased research and analysis, and collaborating with Londoners and stakeholders across all sectors, to generate new ideas and recommendations.

Convening and collaborating: bringing together citizens, experts and decision makers from diverse standpoints to discuss complex issues in a safe space, devise solutions and work out how to implement them.

Awareness raising and advocacy: being an authoritative policy voice on London and promoting our research and ideas to those with the power to act on them – from the grassroots to London's and the nation's leaders – through briefings, publications, social media, press and events.