

The West End.

Year One Review

The West End Partnership
Annual Report June 2015 to June 2016





The West End.

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|--------------------------------|----|
| Foreword | 3 |
| Our Vision | 4 |
| Major Investment Programme | 5 |
| Year Two Priorities | 13 |
| About the West End Partnership | 14 |

foreword

Celebrating Year One

London's West End is one of the most celebrated and exciting places in the world. It is an economic powerhouse, a mixture of urban neighbourhoods, a focus for culture and entertainment, a centre of learning and research and a leading retail destination with the internationally-recognised Oxford Street at its heart.



Cllr Philippa Roe

Leader, Westminster City Council
Chairman, West End Partnership



Peter Vernon

Chief Executive, Grosvenor Britain & Ireland
Board Director, London First
Vice-Chairman, West End Partnership

As a national asset with £51 billion annual GVA, it generates 15% of London's economic output and 3% of the country's; larger than the City of London's contribution. It has one of the largest and most diverse concentrations of jobs anywhere in the UK hosting 610,000 employees, and is a magnet for tourism attracting 31.5m international and UK visitors in 2015 spending £11 billion.

However, in the face of fierce international competition, the West End's success cannot be taken for granted. Although there have been recent improvements to the West End's infrastructure and more are due shortly, with the Elizabeth line the most high-profile example, there is much to do to alleviate the growing pressure on London's infrastructure. Indeed without the need for more investments, the improvements will create greater demand for, and pressure on the West End.

Viewing these pressures as an opportunity, the West End Partnership last year launched a 15 year vision and early delivery plan for growth, to meet rising demand and enhance the quality of life for all users of the West End. The vision and delivery plan seek to secure the West End's future as an economic powerhouse, iconic destination and great place in which to live and work.

The Partnership's approach to delivery is founded on establishing effective relationships between a wide range of partners and stakeholders. We are pleased that a genuine coalition has formed within the West End

Partnership - a coalition that is wider than has previously been the case - and that is beginning to tackle the Partnership's priority projects and programmes. It is doing so from a strong evidence base and a deeper understanding of the challenges facing the West End than ever before.

Across an area from Marble Arch to Tottenham Court Road and Euston to Aldwych, plans are now underway to encourage investment and jobs and create the new work places needed to accommodate them; deliver transformative improvements to the public realm; capture the benefits of Crossrail 1 and 2; reduce traffic; and improve air quality. Several infrastructure improvements such as those to transform Baker Street, Tottenham Court Road and Bond Street are due to start in the next few months.

The Partnership's investment plan will require sustained public funding alongside private capital and commitment. As we build on the significant progress made in the past 12 months, we will continue to make our case for funding, alongside the deeper collaboration required from all tiers of government and the private sector to deliver the Partnership's vision.

our vision

To support London's competitiveness the West End must accommodate growth whilst at the same time strengthening its unique cultural character, amenity and openness

Maintaining growth and cultural character are twin goals. We believe they are compatible and deliverable. This is why the West End Partnership was formed – to be the catalyst and mechanism for action and delivery, with new policies, plans and actions.

But as London grows, the demands on the management of the West End intensify. Stakeholders in the West End will have to collaborate more closely than ever if reasonable expectations of liveability, the need to respond to growth and competition, and the imperative to enable changing patterns of retail, business, culture and lifestyle are to be met.

We have established a set of principles to unify the purpose and plans of many voices and partners. Our vision for the West End is summarised below and accompanied by some of the challenges the Partnership will tackle .

Our vision is that over the next 15 years the West End will be:

1. Vibrant, productive, resilient, creative and surprising
2. Playing a pivotal role in London's continued economic success
3. Providing new jobs and skills opportunities

4. Easy to reach, with less congestion and better air quality
5. Safe and secure as well as open and relaxed
6. Renowned for the quality, interest and extent of its public spaces, helping to differentiate London from other world cities
7. Inspiring a sense of common purpose
8. More self-reliant

To ensure that our vision for the West End becomes reality, our delivery plan is focused on three core areas:

People: Improving the lives of those who work, live and visit the West End

Place: Maintaining the West End as a place of vital importance in the UK's capital city

Prosperity: Increasing the prosperity of the West End, London and the UK

All of our work will be relentlessly focused on delivering these objectives including the work that has started this year and is outlined on the following pages.

major investment programme

The West End Partnership investment programme is expected to deliver substantial benefits

- 102,000 additional jobs – ensuring that the West End supports London’s growing population with the work, skills and enterprise the capital needs
- A net Growth Value Added increase of £12.3 billion in Net Present Value terms over the period 2016-2036, with a growth of over 2 million square metres of additional commercial floor space for firms of all sizes across a diverse range of sectors

A big vision calls for bold moves: The West End Partnership has taken an innovative and partnership led approach to finding new ways of addressing old and emerging challenges. This is demonstrated by the business case to support the proposed investment programme that we recently presented to Government. The business case outlined how the programme would deliver growth, increased productivity, more jobs and financial benefits for the local area, London and the nation as a whole. In return, the proposal is asking government for only a small annual increase in the business rate revenue that Westminster City Council retains to fund the investment (the Council currently only retains 4% of the total business rate revenue it collects, with the remainder being redistributed to the rest of local government and to central government).

In line with the Partnership's guiding vision, we have launched an exciting series of place-shaping programmes of work designed to drive success and positively impact the people, places and prosperity of our world-leading city centre

Oxford Street

A West End Partnership priority development project is the transformation of Oxford Street into the world's greatest outdoor shopping experience:

Oxford Street West

We have spent a whole year considering the problems of congestion, overcrowding and the need for substantial public realm improvements for Oxford Street West, including a reduction in the number of buses, taxis and servicing vehicles and the creation of revitalised open spaces. The investment opportunities created by this major renewal project will have significance to the whole of London. A public realm strategy for the district will be designed, following stakeholder discussions and engagement over the autumn.

Oxford Street East

The West End Partnership has commissioned a new study to maximise the potential of Oxford Street East and its surrounding neighbourhoods. The vision, opportunities and priorities will be reported in late 2016 to the Partnership Board. Growth in employment density and development capacity is anticipated to increase over the next 10-15 years, with further opportunities generated by Crossrail 2.



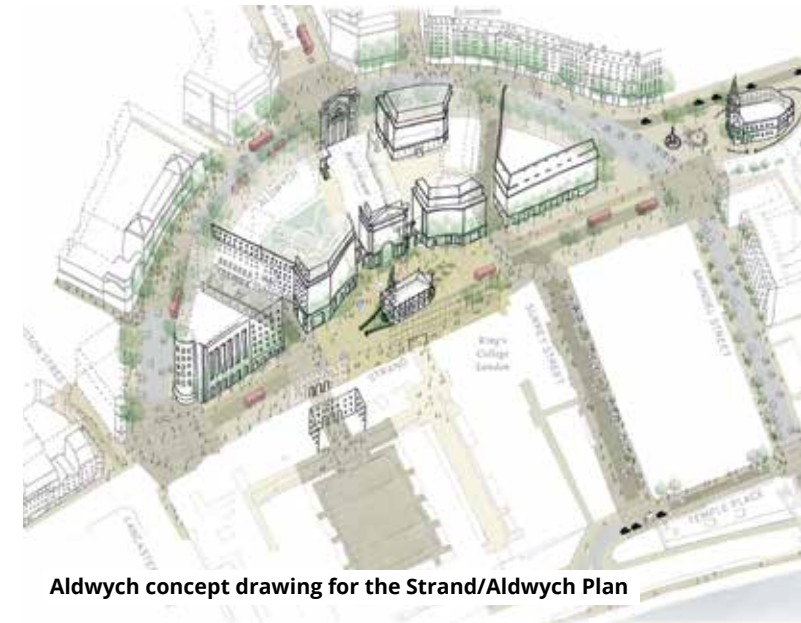
Baker Street Two Way

The West End Partnership, alongside the Business Improvement District, has championed plans for Baker Street, recognising its potential as a critical commercial area able to accommodate up to 17,000 more jobs. A two way traffic scheme funded by TfL and private partners,

delivered by Westminster City Council, will draw in new investment and improvements to benefit local residents and businesses alike. Following extensive public consultation, final plans will be issued this autumn.



Baker Street Two Way from Marylebone Road (artist's impression)



Aldwych concept drawing for the Strand/Aldwych Plan

Strand / Aldwych

The West End Partnership is supporting the Northbank Business Improvement District (BID) to drive significant public realm improvements to the Aldwych gyratory. Improved traffic flow, reduced air pollution and new pedestrian areas are on the horizon for an area that is home to over 20 listed buildings and monuments. The improvements are also set to achieve at least 159,000 additional square metres of floor space and 6,700 additional jobs.

Tottenham Court Road Two Way

Ahead of the major opportunities brought by Crossrail in 2018, the investment of £38 million will significantly transform the public realm in Tottenham Court Road and the surrounding streets. Delivered by the London Borough of Camden, innovative new traffic arrangements

on Tottenham Court Road and Gower Street will make the area safer and more attractive for residents, boost business, improve air quality and create new public spaces. Research and design work has now been completed and on-site work is scheduled to start this autumn.



“One year into this important partnership, we look forward to continuing this work together to improve air quality, ensure better access to broadband and tackle congestion in this unique area of the City.”

“The £38 million West End project is part of the solution, and will transform the Tottenham Court Road area into one of London’s premier commercial, cultural and academic districts. The project will make journeys quicker and safer and create a more attractive place for businesses, the community and visitors.”

Councillor Phil Jones, London Borough of Camden,
Cabinet Member for Regeneration, Transport and Planning

Proposed Bond Street/Burlington Gardens (artist's impression)



Bond Street Retail Public Realm

Funding commitments have been secured to further enhance the positioning of this iconic street as a world-class retail area of luxury goods, as well as improving connections and places for people. Due for completion in 2018, the public realm scheme will see reduced traffic speeds, shared access for vehicles, pedestrians and cyclists, repaved roads and footways, a new

'town square' and create hundreds of employment opportunities. The scheme is already tackling air pollution – waste companies servicing the street have been reduced from over fifty to under ten firms. This major scheme is a partnership project between Westminster City Council, TfL, New West End Company, Bond Street Management and the Crown Estate.

“ The West End Partnership is integral to the emerging proposals to rejuvenate Bond Street's public realm. It has set a benchmark for how the public and private sectors can work together, creating a shared vision for the future of one of our most iconic streets and a key driver of growth in the West End.”

Jace Tyrrell, Chief Executive of The New West End Company

Hanover Square

Hanover Square is all set for a major facelift that will showcase its striking historic features in the best light possible in order to gear up for the arrival of the Elizabeth Line in 2018, which will have one of its Bond Street stations located on the square. Driven by a partnership between

Great Portland Estates, Crossrail and Westminster City Council, plans include the pedestrianisation of the west side, de-cluttering the street, installing new lighting and better traffic management.

Hanover Square – Bond Street Crossrail station (artist's impression)



Broadband

There are endless benefits to superfast broadband – bringing the West End even closer to its global audiences and increasing business efficiency. Having led the call for the West End's broadband deficit to be addressed with improved connectivity, the Partnership is delighted that BT Openreach has agreed to increase fibre availability and is now installing new connection

cabinets and other providers, some new to the West End, have also stepped up their broadband roll out. In addition, our public realm projects such as Oxford Street and Bond Street will have modern ducting to enable faster rollout of fibre based broadband by all providers and deliver the best superfast broadband network to become top of the table for connectivity in the UK.

Employment and Skills

The West End continues to play a pivotal role in London's economic success and has one of the largest and most diverse concentrations of jobs anywhere. The Partnership's vision to provide new jobs and skills is successfully linking unemployed people with opportunities within a wider range of business sectors. Over 140 unemployed local

people in Westminster have so far been recruited to West End jobs as a result of the West End Partnership promotion through the Recruit London programme. In addition, engagement is taking place to link up Camden residents to job opportunities in the West End and surrounding areas.

Enterprise

Higher levels of economic growth need to be matched by sustainable creation of new office capacity. The Partnership is working to ensure the West End maintains its diverse mix of businesses – both large and small – and attracts a new breed of entrepreneurs. The shortage of affordable workspace for small and start-up firms is being tackled. New sites are being considered for business incubation and workspace as a direct result of the West End Partnership's work with Westminster City Council: this includes Somerset House Studios which is soon to complete and Ingestre Place in Soho, with a potential 12,000 square feet for creative firms with plans to start on other projects in the next few months.

Case study

Providing new jobs and skills opportunities

Africa, a 31 year-old Westminster resident, who is a single parent, had been unemployed for a year before being supported by Recruit London with training and interview coaching. Africa did exceptionally well on the course and her confidence blossomed. She was placed into work at New Look on Oxford Street a few months ago and rapidly progressed to Supervisor at the store.

"I'm extremely happy and feel grateful for this opportunity! I have been let down a lot in the past but I'm thankful to Recruit London team for their amazing training and ongoing support. I'm now supervisor of my floor and have been given extra responsibilities which I love" Africa



Air quality

Levels of NO_x and particulate matter in the air are unacceptably high in the West End. This issue is the number one concern of residents and many businesses. The West End Partnership is committed to measures which reduce traffic volumes in the West End and will look to set a target for this, in consultation with the Mayor and TfL. We aim to design West End roads and public realm schemes in a way which helps to reduce pollution, introduce more green space and encourage walking and cycling. An excellent example of partnership working

right across the membership is the new Freight Group, which is chaired by the New West End Company and is commissioned to deliver a West End freight plan while seeking to reduce waste, servicing and freight movement.

The West End Partnership supports Westminster City Council's proposed Marylebone Low Emission Neighbourhood (LEN). This is a much needed scheme in a part of the West End chronically suffering from poor air quality.

“The Crown Estate is delighted to be an active champion of the West End Partnership's ambitions to improve the flow of vehicles, reduce congestion and improve air quality in the West End. Our freight consolidation schemes are encouraging more retailers and businesses than ever before to share delivery and waste vans, making the West End a better place to live, work and visit.”

James Cooksey, Director of Central London, The Crown Estate



year two priorities

Building on the success of year one, the West End Partnership is stepping up the pace and moving several schemes into delivery mode

Priorities include:

- Securing a long-term investment package for the West End brokered with the new London Mayor and the Government.
- Starting public consultation on options to improve Oxford Street West and the surrounding areas, as well as completing the complex technical work required on buses, taxis, freight and pedestrian movement.
- Addressing key gaps in the West End's infrastructure such as energy and broadband by working with the providers on solutions and funding to accelerate delivery.
- Developing ideas to tackle air pollution and congestion – specifically looking at targets to reduce traffic volumes in the West End and identifying more green space within public realm projects.
- Agreeing a vision for Oxford Street East with stakeholders, leading to an agreement with Crossrail over the master planning required for its new stations.
- Opening a 'one-stop shop' for jobs and training in the West End to support residents in enhancing their work skills and businesses in sourcing the right people to address the area's needs. This jobs initiative between the West End Partnership, local authorities, the BIDs, and employment and industry skills bodies, will effectively link prosperity and growth in the West End with the needs and aspirations of the community in which it lies.
- Turning the Northbank BID vision submitted for Strand/ Aldwych into a full programme of improvements. We plan to demonstrate how it will impact and benefit business in the area and to investigate options for improved traffic flow in this congested area.
- Starting the Bond Street, Hanover Square, Baker Street and Tottenham Court Road transformation projects to complete in time for the opening of the Elizabeth Line in 2018.

about the West End Partnership

How the partnership works

The West End Partnership ensures that the West End continues to be at the heart of a strong, thriving London and UK economy. This aim drives the critical investment of time, effort and funds into successful partnership working and a robust approach to delivery across multiple organisations.

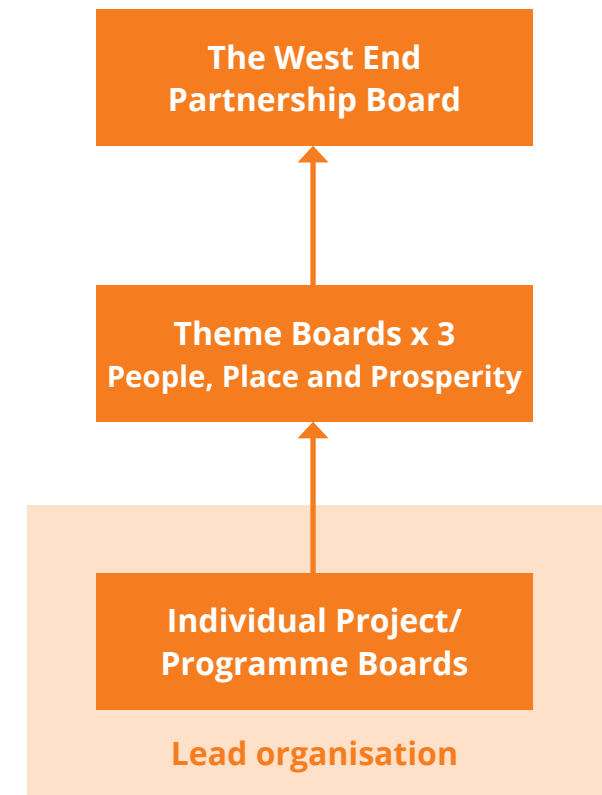
The coalition of public and private sector partners - that includes the London Borough of Camden, Westminster City Council, TfL, the GLA, London First, residents' associations, BIDs, property developers, and a range of other important public and private sector organisations - has agreed a 15 year vision and early delivery plan to bring transformative improvements to the West End.

This plan seeks to drive the critical investment of time, effort and funds into successful, efficient partnership working and a robust approach to delivery.

Governance

The West End Partnership Board was formed to oversee the entire programme and provide overall strategic direction. It is chaired by the Cllr Philippa Roe, the Leader of Westminster City Council and Vice Chair is Peter Vernon, CEO of Grosvenor Britain and Ireland and Board Director London First. The Board has a cross section of senior-level representation from a range of stakeholder organisations.

Overview of West End Partnership Governance



The West End Partnership Board members



| Name | Organisation |
|------------------------------------|--|
| Cllr Philippa Roe, Chairman | Leader, Westminster City Council |
| Peter Vernon, Vice Chairman | Chief Executive, Grosvenor Britain and Ireland and Board Director, London First |
| Alex Beard CBE | Chief Executive, Royal Opera House (cultural sector representative) |
| Matthew Bennett MBE | Soho Society / West End Community Network (representing residents) |
| Val Shawcross | Deputy Mayor for Transport |
| Mike Brown MVO | Commissioner of Transport for London |
| Cllr Phil Jones | Cabinet Member for Regeneration, Transport and Planning, London Borough of Camden |
| David Kaner | Covent Garden Community Association / West End Community Network (representing residents) |
| Simon Loomes | Portman Estate and Baker Street Quarter (representing West End Business Improvement Districts) |
| Professor Tony Travers | Director, London Group, London School of Economics |
| Neil Thompson | Director Great Portland Estates, Westminster Property Association (representing West End landowners) |
| Commander Alison Newcomb | Metropolitan Police |

Each of the three themes of People, Place and Prosperity has a board accountable to the West End Partnership Board. These boards oversee delivery of the relevant projects within their own theme. Membership of these boards is derived from key organisations along with senior individuals holding subject matter expertise in the relevant area. This approach ensures that the outcomes within each theme are successfully coordinated and realised. Each of the projects and programmes also has

its own delivery board, comprising key stakeholders critical to successful delivery.

A coordinating programme team supports the governance of the programme, ensuring the relevant management information is provided to support timely and effective decision-making.



MAYOR OF LONDON



West End
Community
Network



The West End.

Formed in 2013 the West End Partnership brings together senior public service and private sector leaders, academic experts and resident representatives.

It was created to be the catalyst and mechanism to enable the West End to accommodate growth, whilst at the same time strengthen its unique cultural character, amenity and openness.

The West End is one of the most celebrated and exciting places in the world. Comprising just a few square miles, it sits at the heart of a global city projected to expand to ten million people over the next fifteen years.

The Partnership will coordinate and initiate action and delivery in response to this growth with new policies, plans and actions which benefit residents, communities, businesses and visitors alike.