West London

Economic Development Strategy
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WEST LONDON ALLIANCE

West London Business
Chamber of Commerce

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Introduction

As a dynamic economic powerhouse, and a model of successful cultural and racial diversity, West London is a cosmopolitan and globally minded sub-region that contributed £27 billion pounds towards the nation's wealth last year. Home to almost 1.5 million people, blue-chip multinationals, thriving small and medium enterprises, Heathrow Airport and Wembley, it offers a unique place to live and work.

West London is also set to grow and change. With the London Plan forecasting major increases in population, homes and jobs, the sub-region is determined to shape its own future. It aims to harness the opportunities being generated, and to realise its own vision for a sustainable, high quality environment for work, life and leisure.

Our West London Economic Development Strategy, developed by the West London Partnership, represents a road map for the future. It takes a hard look at the issues facing individuals and businesses in the sub-region.

Our vision celebrates diversity, promotes social cohesion and positions West London as a choice location for companies and individuals. It pictures a sub-region where businesses invest and expand, where there is an entrepreneurial culture with a vibrant and thriving SME sector, and where a strong and active voluntary and community sector plays an essential role.

We want to create a place where environmental resources are valued, enjoyed and protected, and high quality education, health care and leisure facilities are available for everyone.

Transport must be at the heart of the vision and we are committed to improving the sub-region's accessibility and reducing congestion.

This document is a framework for future action. It provides the rationale for a comprehensive programme to support West London's economic prosperity and long-term fiscal competitiveness. Steered by extensive consultation, with professionals and stakeholders, it proposes a strategic direction to focus the energies of all stakeholders towards a common vision. The West London Economic Development Strategy exists to complement and support the delivery of the vision of the London Plan and the forthcoming Sub-Regional Development Framework. If necessary it also challenges it, offering solutions which we feel are the best for West London and the capital as a whole.

A continuing theme is to keep West London forefront in the minds of those who make key investment and policy decisions. Nurturing entrepreneurship and promoting technological advance will secure West London's future as a significant location for corporate management and HQ activities. The challenge for business is to adopt policies which facilitate rapid integration and support for newcomers with transferable skills.

The production of this Strategy is an important milestone in itself, but now the strategic objectives will be translated into reality in an Implementation Plan. This will provide the opportunity for innovative forms of private/public partnerships to participate in concrete programmes and projects.

The integration of this Economic Development Strategy with the sub-region's environmental and social development will be furthered by the production of the London Plan's Sub-Regional Development Framework for West London.

We warmly acknowledge the many contributions made to strengthening sub-regional collaboration across West London. Only with strong partnership between the public, private and voluntary sector in West London, working together with the major regional players, can we deliver a West London that has pride of place in the capital.

Councillor John Cudmore, WLA
Joint Chair West London Partnership

Peter Handcock, WLB
Joint Chair West London Partnership

Executive Summary

1 Executive Summary

The Strategy and the Wider Context

1.1 A great deal of work has already been completed by pan-London and regional agencies, in particular the production of the London Plan and the draft London Economic Development Strategy (EDS). A key role of the West London EDS is to support and build on this work. This Strategy has also been developed in line with the strategies of West London's partners.

Implementing the Strategy

1.2 The lifespan of the Strategy will coincide with that of the London EDS and will be fully reviewed within the next year to ensure that it is compatible with the final West London Sub-Regional Development Framework as well as the final London EDS.

1.3 This will be a living, breathing, constantly evolving document and will provide a platform from which to plan and deliver real projects during the period of its lifespan. These will be realised through an Implementation Plan that will be produced in consultation with partners and stakeholders across the sub-region.

1.4 Primarily, it will be implemented through the mainstream programmes and action plans of partner agencies such as the London Development Agency, Transport for London, the London West Learning and Skills Council, the six West London borough councils, businesses and voluntary and community sector organisations.

West London Partnership

1.5 The West London Alliance, comprising the six West London borough councils and West London Business (the sub-regional business membership organisation for West London), formed the West London Partnership in 2000. The West London Network for voluntary and community organisations and the London West Learning and Skills Council joined the Partnership in 2004.

About West London

1.6 West London possesses a number of unique factors that distinguish its economy from its neighbours and the rest of the UK. These include Heathrow Airport, a significant creative industries sector, some of the biggest blue chip businesses in the world, a significant concentration of employment within the transport and logistics sector, particularly within air transport, and excellent road, rail and air links to all parts of Britain.

1.7 With a population of almost 1.5 million people West London is a large and diverse economy which contributes £27 billion to the UK economy and employs almost 750,000 people. One of West London's key strengths is that it has a diverse, energetic and dynamic population, with some 35% of residents from black and minority ethnic communities. This rich, multi-cultural and international base provides a strong link to international communities and markets.

1.8 Whilst an overview of West London reveals a relatively prosperous area the reality for some is very different: significant pockets of deprivation exist within the sub-region. Unemployment in West London is also relatively high at 6.4%.

1.9 West London generally possesses a high quality environment, with large areas of open space, parkland and green belt land for leisure and recreation. However, its natural environment is under pressure from development – population densities, transport levels and economic activities exert significant pressures on environmental quality

1.10 The sub-region's public transport network is extensive, with a large number of underground, overland and bus connections with the centre of London. However road traffic congestion on major roads such as the A4, M4 and M40 is a growing problem, as is the associated pollution. Also, access to public transport is variable across the area, as is the quality of transport around and within the sub-region.

International Setting

1.11 West London has a number of global sector strengths, some of which are clearly linked to Heathrow. They include tourism; logistics; ICT; media and creative industries and food processing.

West London and its Surrounding Regions

1.12 Located between the economically prosperous areas of Central London and the Home Counties, West London's accessibility characterises its competitive position relative to other sub-regions. West London contributes approximately 17% of the output of Greater London.

1.13 Output per capita and per worker within West London exceeds the British average, although West London lags behind the rest of London.

1,14 Employment growth experienced by West London since 1994 has exceeded national growth in employment, but is similar to growth in London.

1.15 Whilst overall levels of health are not dissimilar to London and the South East generally, in West London there are local concentrations of poor health.

1.16 West London, like London as a whole, has a considerably higher level of residents with NVQ level 4 or above than the British average. However, it is of concern that a relatively high proportion of West London residents also have relatively low level skills – around 13% have no formal qualifications.

Drivers

1.17 There are a number of key economic drivers in West London:

1.18 Heathrow Airport - Employment within air transport has grown by 6% per annum between the years 1998 and 2002 – an increase of over 25% during the four year period.

1.19 Tourism and the visitor economy - Already a significant contributor to the sub-regional economy, the economic impact of tourism and the visitor economy will grow, with an expected increase of 30 million passengers per annum passing through Heathrow Airport as well as the projected development of the 'Visiting Friends and Relatives' and 'Business Tourism' markets that West London is ideally placed to exploit.

1.20 Recreational and cultural activities - The new Wembley Stadium project epitomises the growth within these sectors.

1.21 The food cluster - With particular concentrations around the Park Royal/Wembley area and Southall.

1.22 The creative industries – West London has a strong representation within the creative industries, with TV and radio having a particularly strong representation within the area epitomised by the BBC studios at White City. The digital media and ICT sectors are also strong in West London.

1.23 Other important features of the West London economy include the key employment and development areas of Wembley, Park Royal and White City:

1.24 Park Royal - is an economic area of national significance, centrally located within the West London sub-region. Straddling the three London boroughs of Brent, Ealing and Hammersmith & Fulham, it is the largest industrial and business location in the UK and home to 2,000 businesses.

1.25 Wembley Development - The new 90,000 seater, £757m Wembley Stadium development is not only a new iconic sporting venue, the 42 acre area around it will be a sporting, leisure, cultural, accommodation and commercial centre for London, unprecedented in its scale and scope. It demonstrates the importance of the growing leisure and tourism industry in West London.

1.26 White City - represents one of the most significant urban regeneration projects in West London. The £600 million, 1.2 million sq ft project will include a new retail centre and transport links, and is expected to leave a legacy of 5,000 full and part-time jobs.

1.27 The voluntary sector also provides a considerable level of employment within West London. Over 6,000 formal, active voluntary and community organisations are based here and currently employ 20,000 paid staff.

Sustainability, Diversity and Health

1.28 The cultural and racial diversity of West London is a great strength and asset that provides many opportunities for the sub-region's economy, particularly in terms of the broad range of language skills and a high level of connectivity to international markets.

1.29 Within this Economic Development Strategy, however, it is important that we acknowledge and address disadvantages and weakness alongside the advantages and strengths noted above, in order to seek a fair and equitable outcome for all residents. Disadvantage affects people in many different ways, for example poor housing, low income, high crime environments, poor health and access to services.

1.30 These problems can often lead to social exclusion. Our vision is about creating an environment where people can go about their lives with a feeling of dignity and security. This will involve addressing the needs, aspirations and cultures of the different communities. This Economic Development Strategy celebrates and promotes cultural diversity and the contribution different communities have to make to life in West London.

1.31 It is also important that we recognise health as a cross-cutting theme throughout the West London Economic Development Strategy. Health not only has an important influence on economic activity, but is also a major employer within the West London economy.

Skills for Growth

Strategic Context

1.32 The Government's Skills Strategy White Paper affirms that skills are a key asset which impact positively on productivity, innovation, profitability and, ultimately, the competitiveness of business. The London Economic Development Strategy 'Sustaining Success' lists a number of objectives aimed at investing in people to tackle barriers to employment, and improve the standard of training and business support to meet the needs of the wider community. These are objectives that also concern issues to be addressed within the London West LSC Strategic Area Review due for completion in 2005.

Key Issues

1.33 A significant proportion of individuals across West London posses an NVQ level 4 qualification or above, while at the same time a relatively large proportion of individuals posses only low level skills and / or have basic skills' difficulties. Indeed, over a fifth of West London's population has poor literacy and numeracy skills, creating real barriers to employment.

1.34 As noted above, the rich ethnic diversity of the West London population contributes to the wide language skill base that exists across the sub-region. However, a number of individuals within West London's BME communities, particularly amongst the 60,000 refugees and asylum seekers, have little or no English language skills, again creating barriers to employment.

1.35 Skill development forms not only an essential element of improving the pathways to employment but also of improving progression within employment. Groups such as single parents, the disabled, non-English speakers, and ex-offenders are often excluded from training opportunities.

1.36 While there is an increasing need and demand for high level skills, due to the focus on the development of the knowledge economy, it is also recognised that within West London there is a shortage of intermediary skills and qualifications at level 2 and 3. These shortages act as a break on the overall productivity and competitiveness of West London businesses.

1.37 The Government advocates a demand led approach to skills provision and as such it is essential that employers in West London are fully engaged in identifying skill needs and embrace a culture of lifelong learning. However, the West London business base is made up of a number of micro businesses that face additional barriers to workforce development training.

1.38 In addition to addressing current skill requirements, it is essential to consider the changing skill needs of West London's emerging growth sectors, as well as those such as construction which have recognised skill shortages. It is also important to recognise the ongoing skill requirements of the community, voluntary and public sector, which currently employ over a fifth of West London's workforce. It is essential, therefore, that training provision meets these needs and delivers them in a manner that stimulates participation by individuals and organisations alike.

1.39 West London should also create opportunities to capitalise upon its innovative potential by expanding the transfer of knowledge and expertise between Higher Education Institutions and organisations in the sub-region through such initiatives as WestFocus.

Objectives

1. Focus skills provision on identified skills gaps and needs of key and emerging sectors in West London.
2. Create comprehensive, innovative and joined up provision of English Speakers of Other Languages (ESOL) courses ensuring that it is sufficiently workplace focussed and accessible to hard to reach groups.
3. Improve numeracy and literacy skills amongst schoolchildren and the adult population
4. Address the current workforce skills gaps across level 2 and 3 qualification levels
5. Seek to offer support to increase the demand for workforce development training amongst West London employers, in particular SMEs, micro businesses as well as community and voluntary organisations.
6. Help foster a culture of workforce development within the private, public and voluntary sector in West London.
7. Remove barriers to improve training access and employment opportunities for currently excluded groups and excluded and disadvantaged pupils.
8. Encourage further development in the lifelong learning culture in West London
9. Ensure that skills development programmes meet the changing skill needs of business and are sufficiently flexible to meet business access requirements.

Business Competitiveness

Strategic Context

1.40 West London lies within the UK's most competitive regional economy. However, the West London economy is distinct, and differs considerably from those of its neighbouring sub-regions.

1.41 An analysis of sector employment within West London reveals a number of specialisms in the sub-region. High levels of employment within the transport and communication sector arise from the accessibility of the sub-region, particularly assisted by the presence of Heathrow Airport.

1.42 The creative industries are a strength, particularly film, TV, audio and digital media. The area has a significant ICT sector – although in comparison with the neighbouring Thames Valley this sector is relatively under-developed.

1.43 Ensuring support for small and medium sized organisations is integral to the development of the sub-region. For example 87% of businesses in West London employ ten people or less. However relatively few small organisations currently take up such support and there must be efforts to make them more aware of the business services available to them

1.44 The level of business support on offer tends to be generic and does not cater specifically for high-technology, knowledge-based or BME businesses. More tailored business support is therefore required to help such businesses flourish.

Key Issues

1.45 There are obvious strengths in the sub-region, such as transport and communications, but West London needs to develop more specialisms in the knowledge-based sectors.

1.46 Around 80% of those entering the West London workforce in the foreseeable future will be from ethnic minority communities. It is important to ensure that employment and business support services meet their needs.

1.47 The density of higher education institutions, as well as the large number of knowledge based businesses in West London and its surrounding sub-regions, provide significant future opportunities. Initiatives such as Higher Education commercialisation programmes and the development of further links with knowledge institutions will significantly aid economic development within West London.

1.48 The tourism market offers significant opportunities for West London. In particular, the meetings, incentives, conferences and exhibitions market is growing. Locations such as Heathrow, Park Royal, White City and Chiswick Park offer opportunities for business tourism to be fostered.

1.49 Geographic concentrations of particular populations in specific locations (for example people from the Asian sub-continent in Southall) give some neighbourhoods a distinctive quality. There is a visible concentration of activity in terms of BME entrepreneurship in West London and successful examples are particularly noticeable within food processing and distribution.

1.50 However, in order to ensure that West London capitalises on these opportunities it is essential that recruitment problems and skill shortages are fully addressed.

Objectives

1. Develop a coordinated and more integrated support service for businesses and the voluntary and community sector that caters for the wide range of business activities undertaken in West London. Additional business support services should be aimed at emerging and high value added businesses.
2. Provide a world-class and targeted inward investment and aftercare service.
3. Further develop links between private, public and community and voluntary sector and academia at all levels (ranging from school to university education) through the activities of WestFocus, for example.
4. Provide business support for under-represented groups, such as ethnic minority businesses.
5. Develop the growth and competitiveness of key sub-sectors within knowledge-based industries. These should seek to incorporate where relevant those growth sectors already identified by the London Development Agency, but should concentrate on the creative industries, tourism and ICT, as they provide the economic linkage highlighted by the first objective.
6. Ensure provision of training in business skills and foster a strong entrepreneurial culture, particularly targeted toward high growth and/or high employment sectors.
7. Ensure the West London economy benefits to the full from its cultural and ethnic diversity, harnessing the growth potential of minority ethnic community owned businesses through targeted support and development.

Land and Property

Strategic Context

1.51 The strategic context in terms of land and property is set out within the newly adopted London Plan. In delivering land for employment, industrial policies in the London Plan reflect the broader policy concerns and over-riding need to achieve sustainable development patterns. Critically in the context of West London and strategic site development, there should be a closer relationship between public transport accessibility, making efficient use of land and encouraging a diversity of uses.

1.52 A critical issue for West London will be its ability to accommodate employment growth and economic development in physical terms. The need to supply appropriate sites and premises to meet projected employment growth must be accompanied by action to ensure the vitality of town centres which combine leisure, business and commerce activities with strong inclusive communities. It is important to ensure strategic employment areas, as well as key local employment sites, are safeguarded for employment use.

1.53 Going forward the West London Economic Development Strategy will inform the West London Sub-Regional Development Framework of the London Plan and, subsequently need to take account of its contents, in order to ensure that the application of land use policies meets economic development objectives.

1.54 Key current developments in West London include the construction of T5 at Heathrow; the new national stadium and the surrounding area in Wembley; the modernisation of Park Royal and the development of White City.

1.55 The London Plan recognises that West London has relatively limited brownfield development land and as such must make better use of existing urban / brownfield areas and empty properties. At the same time it is important to ensure high quality design and to preserve historic sites in order to create a sense of community.

1.56 A number of strategic areas of opportunity within West London are identified in the London Plan. These include Wembley; White City; Park Royal; Heathrow; Feltham/Bedfont Lakes; Hounslow; Hayes; West Drayton; Southall; Stockley Park and Willesden Junction. These areas will need to be the focus of support that provides the appropriate mix of development opportunities to meet demand as well as encourage mixed use developments.

1.57 The London Plan also identifies a number of Strategic Employment Locations (SELs) sub-divided into Industrial Business Parks (IBPs) and Preferred Industrial Locations (PILs) and town centres.

Key Issues

1.58 West London has strong urban centres but also vulnerable or declining secondary town centres and suburban areas. Town centres have an important role to play in accommodating some of the projected growth in housing and employment, and it is important for West London to rejuvenate these town centres through the re-use of vacant and underused land. There is a need to boost the confidence and image of its town centres.

1.59 Heathrow Airport, West London's transport network, and the quality and availability of attractive sites and premises, will be critical factors in determining the extent to which West London can maintain its attractiveness to business and support London's position as a world city. In terms of future capacity, another critical issue is the extent to which current land supply will be maintained.

1.60 There is a need to ensure that the key strategic sites identified attract inward investment, as well as support the development and growth of indigenous firms. There is also a requirement to ensure that an appropriate mix of opportunities is created to meet market demand and cluster opportunities in higher value sectors. In addition, it is important to achieve a balance between economic, environmental and social needs, as well as adequate accessibility particularly in terms of public transport.

1.61 Evidence of unmet demand for small managed workspaces currently exists, specifically business incubators for SMEs and community and voluntary organisations, and this demand pressure is likely to continue into the future.

Objectives

1. Inform and contribute to land use policy objectives for West London, specifically the Sub Regional Development Framework and Local Development Frameworks, to ensure delivery of spatial elements of the economic development vision.
2. Ensure that there is sufficient development land of the right quality to meet the investment needs of West London and balance the tensions around demands on land use.
3. Identify and agree a policy for sustainable development of appropriate strategic sites, which provide a mix of development opportunities to meet current and future demand, and encourage mix use developments.
4. Promote, manage and enhance the quality of the existing stock of key strategic employment locations and improve transport links to these locations.
5. Promote high standards of design and environmental good practice, including encouraging sustainable construction and waste management practices as well as effectively recycling major industrial sites.
6. Promote historic sites and design new cultural buildings to create a sense of community.
7. Support the rejuvenation of town centres of all sorts (district metropolitan etc) in West London as centres for employment, shopping and living. Design out crime and incorporate mixed-use development in town centres to make them sustainable.

Housing

Strategic Context

1.62 There is a chronic shortage of housing in West London. The need to develop decent, affordable homes is a key priority within national, regional, sub-regional and local housing strategies as well as operational policies. Housing and quality of life are inextricably linked. We aim to build upon West London Housing Strategy, the key aims of which are to increase the supply of housing across all tenures, grow the number of affordable houses, improve housing conditions and develop sustainable communities.

1.63 Good quality housing is needed to attract and retain workers of all skill levels. It is essential that West London develops and maintains an appropriate mix of privately owned housing, intermediate housing and social rented accommodation in order to avoid skill shortages and improve social and economic inclusion.

1.64 In light of the impact housing has upon key workers in frontline public services, such as health and teaching, the Deputy Prime Minister announced a key worker programme in October 2003 offering support to workers within these categories. The London EDS also outlines the need to ensure that an adequate supply, mix and choice of housing be made accessible to all income levels and meets the differing needs of West London's communities.

1.65 It is important that houses are built to a high standard of design utilising cost effective and environmentally sustainable materials that are in tune with the local setting and that improvements are made to the existing housing stock.

1.66 The London Plan outlines the spatial dimension of housing policies within areas of intensification and opportunity, identified on the basis that they are capable of accommodating new jobs or homes, and as such their potential should be maximised.

Key Issues

1.67 By 2016 there will be substantial population growth across West London. As a consequence the rate of growth on housing demand will also rise substantially. In order to ease demand pressures on open space resulting from the need to develop new housing, higher density build should be considered where appropriate.

1.68 West London has a particularly transient population, which housing strategies and planning need to take into account by ensuring that there is a suitable and diverse range of housing available. The main source of accommodation that meets this need is likely to come from the private sector. It is important therefore to include the private sector as much as possible within implementation and planning processes.

1.69 The amount of newly built housing in West London represents only a tiny proportion of the total stock, with older housing stock in some of the poorer areas deteriorating. An important issue in meeting the current housing needs within the sub-region is the degree of investment secured to improve the quality and status of existing housing stock.

1.70 Encouraging a strategic approach developed jointly between the private sector, housing associations, local authorities and other public bodies is essential to meeting the housing needs of West London.

1.71 The housing sector, through the construction industry and the stock maintenance and refurbishment activities of Local Authorities, also provides an important employment base within West London. Ensuring that a reasonable proportion of this employment is directed towards West London residents will result in up-skilling within the community, additional income opportunities and reductions in unemployment. The economy will also benefit if local suppliers are used in new housing developments.

Objectives

1. Encourage an appropriate mix of housing provision, e.g. tenure, type, size, reception, move on.
2. Increase supply of affordable housing for rented, key worker, shared ownership (where it meets local need) and supported housing.
3. Improve quality of older housing stock and adjacent public space.
4. Engage with the rented (private and RSLs) sector to raise standards and establish dialogue between LA planners, RSLs and private developers about increasing supply.
5. Local Authorities across the West London sub-region should promote a reasonable amount of employment for local workers and support local employers within local housing development initiatives.
6. Promote sustainable housing, including waste management good practice, sustainable construction practices and design for the whole human life cycle.
7. Ensure higher density build where appropriate and where sustainable homes can be built, particularly where there is good access to public transport.
8. Provide greater choice of affordable housing.
9. Ensure sufficient availability of intermediate housing.
10. Develop more cohesive and sustainable communities by, for example, breaking up areas of dense, poor quality social housing by including a mix of tenures.
11. Ensure that West London lobbies strongly for its share of housing support and resources.

Transport

Strategic Context

1.72 The strategic context for the development of transport strategy in London is set by a range of documents including the Draft London EDS, the Mayor's Transport Strategy for London, the London Plan, and the West London Sub-Regional Development Framework of the London Plan (set for completion in 2005). The strategic context will also include government policy and strategy, and the policies and strategies of South East Regional Assembly.

1.73 The London Plan sets an objective of increasing the capacity, quality and integration of public transport to meet London's needs. In particular, the Mayor is to work with strategic partners to increase the capacity of public transport in London by up to 50% and to improve the integration, reliability, safety, quality, accessibility, frequency and attractiveness of the existing public transport system.

Key Issues

1.74 Transport in West London is characterised by local mobility problems, significant cross-London commuting and poor orbital communications within the sub-region. West London, from a transport perspective, is focused on movement to and from Central London.

1.75 The current planned strategic transport intervention covering West London primarily consists of Crossrail Line 1, the establishment of a number of major strategic interchanges, the West London Tram and improvements to the West London Line (as part of Orbirail).

1.76 The West London Tram, along with increased bus priority, will: improve access to town centres, the rail and Underground networks and the suburbs; and provide public transport options that offer a real alternative to cars and support development and regeneration priorities.

1.77 Road congestion in West London is severe compared with the rest of London – excepting Central London. Many radial and orbital routes need upgrading to meet both current and future demand. The main road routes in West London are predominantly east-west and include the M4 motorway, the A4 and the A40.

1.78 Road congestion is not the only issue, within West London there is also a shortfall in the provision for commuter parking and the level of accessibility to industrial sites. Both the London Plan and national and regional planning guidance recommend that parking in new developments be subject to maximum limits. As a result, however, there is the possibility that by allowing higher levels of parking, local authorities outside London could gain a competitive advantage in attracting new business investment.

1.79 Alongside further investment in the transport network, there needs to be increased promotion and investment in the use of non-motorised travel, in particular continuing to expand the cycling infrastructure and improving conditions for pedestrians. Most journeys in West London are relatively short in distance and could be undertaken on foot or bicycle provided that infrastructure and environmental conditions are appropriate.

1.80 Establishing a fluid and integrated labour market across the sub-region is an important factor; however, some transport issues act as barriers to achieving this goal. These must be addressed through initiatives aimed at improving public transport access to town and employment centres and housing developments. Initiatives should also be developed to address overcrowding on public transport.

1.81 A major feature of West London is the presence of Heathrow Airport, which not only generates a huge demand for surface travel on the western fringe of London – as well as to the centre – but also provides substantial employment. At present, the full economic benefits of Heathrow Airport are not being maximised by West London, due to high levels of outflows of associated activities to other regions and sub-regions. West London must aim to capture these benefits.

1.82 The West London economy is clearly very dependent on Heathrow Airport and related activities, and any planned increase in air travel capacity will only be possible as long as there is no further environmental deterioration in air quality and noise.

1.83 West London has a strong freight industry presence. Freight movements in West London are all adversely affected by congestion, particularly at peak hours. Good access to the motorway and trunk road network is essential, as are reliable journey times on the M25, M4 and A40 and the provision and protection of suitable freight locations, including rail terminals. There is also a need to reduce the large volume of heavy goods vehicle traffic that currently travels through West London's residential areas and town centres.

Objectives

1. Establish a clear vision and blueprint for the future of West London's transport network that is recognised by and influences any review of the Mayor's Transport Strategy for London.
2. Meet or exceed the Mayor's objective of increasing the capacity of public transport by up to 50%, through a design framework appropriate to West London, and improve the integration, reliability, safety, quality, accessibility, frequency and attractiveness of the West London's existing public transport system.
3. Improve and expand West London's transport interchange facilities as a mean of strengthening links between radial corridors and addressing 'orbital' and 'orbital-radial' transport provision. These interchanges should initially be identified in conjunction with Transport for London.
4. Reduce problems of congestion and parking through interventions based on a cost-benefit analysis of the options for: further development of the road network; managing the demand for access to the road network; and providing alternatives to the road network.
5. Ensure that the sub-region's transport network plays a key role in enabling West London to strengthen and fully capture the benefit and impact of economic activity associated with Heathrow Airport and its future growth without degrading the environment further.
6. Minimise the environmental impact of transport through supporting the West London air quality action plans.
7. Minimise the environmental impact of high levels of freight transport by supporting the work of the West London Freight Quality Partnership.
8. Achieve a modal shift to other forms of transport than the car, particularly for short trips.
9. Promote and support investment in major transport infrastructure improvement through the implementation of the Crossrail Line 1 proposal (and in the longer term the south-west and north-west extensions), the West London Tram and improvements to the West London Line.

Environment and Quality of Life

Strategic Context

1.84 For the purposes of this Strategy sustainable quality of life is defined as a protected natural environment, a healthy and inclusive society with safer streets, a well-connected and accessible sub-region with high quality local services and cultural amenities. Meeting the quality of life and environmental objectives of business and residents is vital if economic growth, prosperity and community inclusion aspirations are to be met.

1.85 Environmental and quality of life issues encompass a broad range of national, regional and local strategies. The London Plan outlines a number of unsustainable trends within West London that need to be addressed, including traffic congestion, lack of affordable housing, economic and social polarisation, pollution and general damage to the environment. The London Plan also outlines the need to prioritise urban design, culture and sport and these issues will be addressed within the Sub-Regional Development Framework.

1.86 The Mayor's Green Procurement Code and the development of public sector green purchasing policies offer an opportunity to contribute to the creation of new employment within the environmental and green technology industries.

1.87 Borough community strategies, produced by the West London councils and their local and sub-regional partners, will also make an essential contribution to sustainability and environmental quality.

Key Issues

1.88 Improving public transport links and reducing the use of private vehicles are important aspects of improving air quality and reducing noise pollution. Tackling the level of crime and the fear of crime is also a high priority for many residents and businesses.

1.89 As well as addressing issues that are potentially harmful to the quality of life and environment in West London, it is also important there is a focus on promoting positive quality of life aspects including conserving natural and historic assets, promoting good quality urban design and the regeneration of environmental assets such as canals, as well as other waterways and green open space for leisure and recreation.

1.90 Opportunities to improve quality of life by building on West London's cultural creative and sporting assets are central to our Strategy, as well as strengthening West London's community and voluntary sector to deliver key aspects of community capacity building and improvements to the urban environment. The community and voluntary sector play a vital role in supporting initiatives that seek to reach disadvantaged and hard to reach groups and individuals.

1.91 Encouraging businesses to adopt Corporate Social Responsibility policies can improve environmental practices amongst the business community and increase green procurement levels. Opportunities to take forward local improvement schemes present themselves within the Business Improvement District (BID) partnership arrangements. There are opportunities through partnership activity to improve the public realm of town centres and promote good quality urban and architectural design.

Objectives

1. Invest in sustainable business communities and encourage businesses to play a greater role in the management, maintenance and improvement of their business neighbourhoods, for example, through the Business Improvement District pilot areas.
2. Support businesses and other employers to improve their environmental management systems, including assisting them to achieve environmental standards such as ISO 14001, and encourage the adoption of Corporate Social Responsibility (CSR) policies by businesses.
3. Ensure high quality landscape / design of future housing and employment site developments. Specifications for designs should include the need to consume resources more efficiently, minimise and recycle waste and improve energy efficiency.
4. Support boroughs to produce strategies which aim to provide quality and accessible green space and promote schemes for the regeneration and protection of environmental assets that are under-utilised or under threat, such as canals and waterways, and the Green Belt and areas on the urban fringe.
5. Build the capacity of the voluntary and community sector and community enterprises, particularly where they contribute to the sustainability and environmental improvement objectives of this Strategy, and encourage volunteering and active citizenship and participation.

Branding

Strategic Context

1.92 The development and use of a West London brand is important to generate investment and confidence in the West London economy and to enthuse the local populations of the sub-region.

1.93 The Draft London EDS recognises the importance of marketing and promotion. The development of a brand for West London, however, must be mindful of the pan-London brands that already exist and should therefore complement rather than compete against them.

1.94 The stakeholder consultation on the branding of West London identified a number of key strengths and unique characteristics that make up West London's identity.

1.95 In terms of business strengths, the consultation process outlined that West London is characterised by unparalleled access to markets via the motorway network and Heathrow Airport; has strong cluster developments in growing industries such as media, creative industries and food manufacturing, and is home to a number of multinational HQs.

1.96 West London's social strengths are identified as being: good employment prospects; a culturally and racially diverse population, better than average communication links in and out of town; great sporting arenas and access to the whole world.

Key Issues

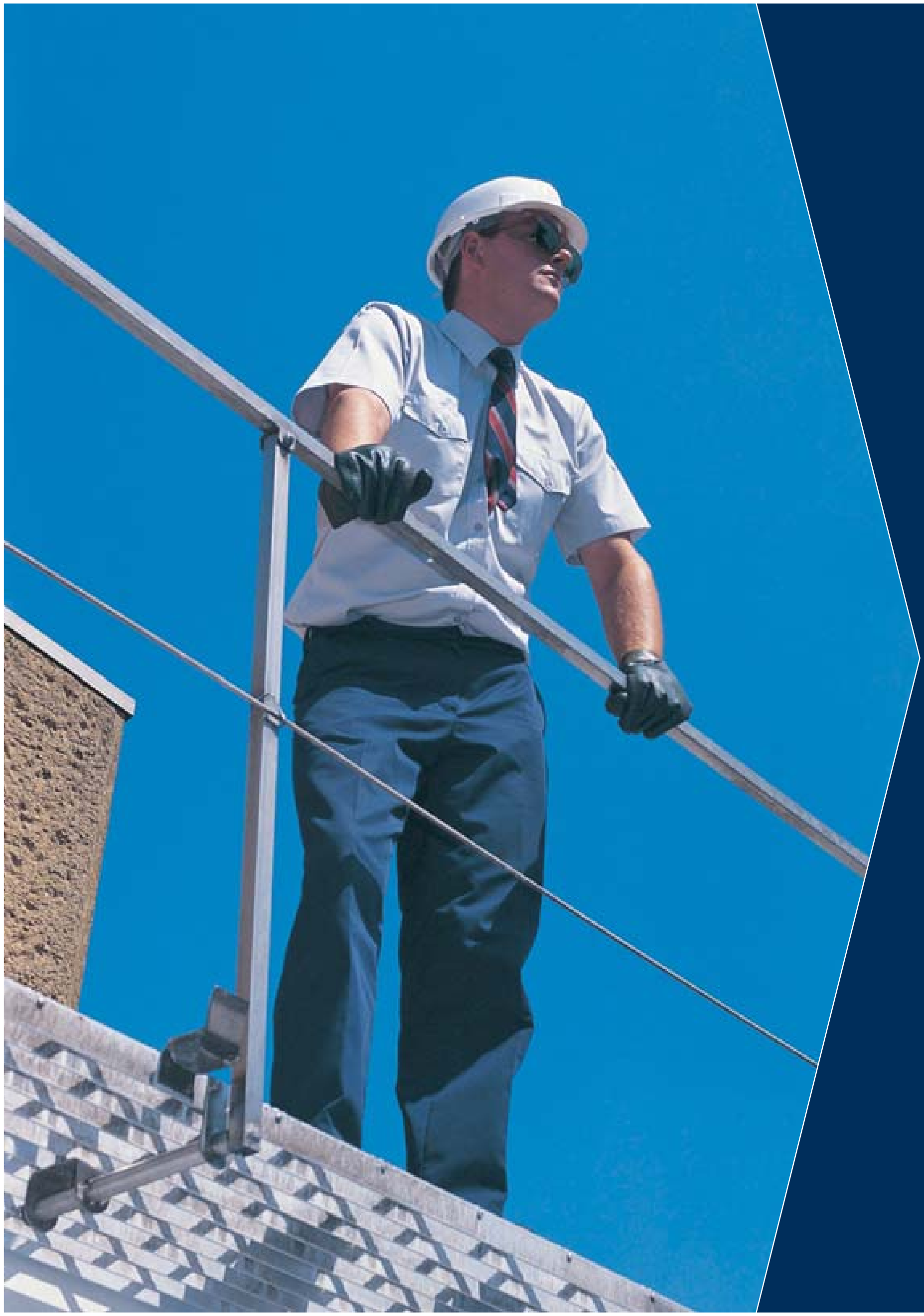
1.97 A complex map of public sector brands, many of which have a direct interest in West London already exist. Similarly, West London has an interest in a large number of both regional and pan-London organisations and their activities. It is important, therefore, that the West London brand is not only distinctive but also works in harmony with other brands. Furthermore, the West London brand must develop a sense of shared ownership and achieve high levels of buy-in from organisations and communities in West London.

1.98 In West London, perhaps the most obvious application for branding is as part of marketing communication to support inward investment activity. However, it can have external applications such as tourism and transport.

1.99 Five brand themes have been identified which start to capture the key qualities of West London. The themes, which aim to develop the distinctiveness of West London and to make an intuitive connection with people are: diversity, success, access, partnership and assets.

Objectives

1. Raising awareness – For West London to be widely recognised amongst internal and external audiences as distinctive in London, the UK and globally, with positive association of the identified brand themes as a means to drive better economic performance and perceptions of the area/quality of life.
2. Re-orientating the business model – For West London to clearly communicate to public and private sector audiences the link between continued success and the need for strategic investment to overcome social issues, including deficits in learning and skills, lack of affordable housing and pockets of deprivation.
3. Influencing consumers – For West London to be widely recognised as an attractive place to live, work and participate in cultural and leisure activity. Not just for existing high profile places such as Wembley for sport or Chiswick for upmarket living, but a much wider spectrum of places that reflect the diversity and assets of the area that are often hidden.
4. Clarifying and unifying – For West London stakeholders to have a clear and consistent understanding of the sub-region's qualities and vision. For this understanding to be underpinned by a variety of initiatives that will support this shared understanding and sense of purpose for the area. To capitalise on the effective partnership working in the region.



Vision

2 Vision

Sustainable and Inclusive Economic Development

2.1 This Economic Development Strategy has been produced **to ensure that sustainable and inclusive development is achieved for all those who work and live in West London**. The Strategy aims to build on the unique competitive strengths of West London, to identify new opportunities to develop these strengths, and contribute to West London's environmental and social development needs.

The Challenge

2.2 Economic growth is vital but does not always result in sustained and inclusive development. If unmanaged, this growth can result in effects that are harmful to West London's long-term economic, environmental and societal development. The framework for the Strategy, therefore, is very much based on meshing West London's future economic agenda with its environmental and social development.

Key Principles

Our approach has been to develop the Strategy through the application of these key principles.

2.3 Success – Building on West London's leading role in the UK economy, developing a sustainable creative and knowledge-based economy with a vibrant small and medium size (SME) business base and an entrepreneurial culture that values and prioritises learning and skills.

2.4 Diversity – Championing West London's cultural and racial diversity to realise the social and economic benefits in a region noted for its community cohesion, quality of life and cultural amenities.

2.5 Access – Ensuring that West London continues to benefit from its historical pre-eminence in connecting people, business and movement. Ensuring West London takes a leading role in developing transportation.

2.6 Entrepreneurial culture – Developing our SME base to ensure that they are able to access the high quality business support, skills and learning resources they need to increase their competitiveness and sustainability.

2.7 Participation – That local people, whatever their socio-economic position and wherever they live, are able to access the employment and training opportunities created in West London and that we build a lifelong learning culture so that they have the necessary skills and knowledge.

2.8 Partnership – Continuing to develop the strong record of integration, developing a well-connected sub-region, specifically connecting the more deprived areas and communities with the most successful parts of the West London sub-region. Demonstrating the power of effective partnerships.

2.9 Sustainability – Achieving economic growth and prosperity whilst ensuing that there are positive impacts on the well being of West London communities and the sub-regions environmental quality.

2.10 Assets – Recognising the importance of developing West London's environmental assets – its green spaces, water resources and biodiversity and creating high quality built environment. Re-establishing our town centres as centres of economic activity. Promoting an urban renaissance and design excellence throughout the built environment.

The Vision

2.11 Synthesising these themes, the overall vision can be stated as follows:

> *West London will be the choice location for both businesses and individuals, an inclusive and sustainable society where business and communities benefit from a global perspective, a leading player in the development of London as **the** global hub. 'A destination renowned for creating richer solutions and opportunities through its ability to embrace and celebrate diversity, change and success with all its participants.'*

2.12 To deliver this vision, the Strategy sets out a way forward for West London under six core framework headings:

- **Skills for Growth** – Improve levels of employability and reduce the polarisation of West London's skills economy primarily by improving training access opportunities for excluded groups, improving literacy and numeracy skills and fostering a culture for lifelong learning and workforce development.

- **Business Competitiveness** – Establish a competitive economy underpinned by sustained and sustainable growth and value-added output principally through ensuring high and effective levels of appropriate support for both indigenous businesses and foreign-owned investors. There is also a need to further develop knowledge-based economic activity through heightened linkages and interaction between businesses in West London and the academic community, as well as with businesses in surrounding sub-regional economies.

- **Land and Property** – Secure a sustainable economy through the appropriate utilisation, including mixed use development, of West London's land and property by promoting, managing, and enhancing the quality of the existing stock of key strategic employment locations, and promoting higher standards of design and environmental good practice. Supporting the rejuvenation of town centres in West London as centres for employment, shopping and living.

- **Housing** – Increase the supply of affordable housing and supported housing, improve the quality of older housing stock, and ensure the sustainability of housing developments. A focus on developing an appropriate mix of housing provision, in terms of tenure, type, size, reception and move-on property and ensuring higher density build where appropriate, particularly where there is good access to public transport.

- **Transport** – Invest in public transport infrastructure, in particular to support the suburban centres and where the main employment and housing growth will occur. Plan public transport to link residential areas and the town centres in West London.

- **Environment and the Quality of Life** – Invest in sustainable business communities, and encourage businesses to play a greater role in the management, maintenance and improvement of their business neighbourhoods. Support businesses and other employers to improve their environmental management systems. Ensure high quality design of future housing and employment site developments. Improve access to quality green space and cultural resources. Quality of life issues must also address crime and the underlying causes of crime.

2.13 Each of the six themes is highly interdependent and there are some areas within West London where there are concentrations of multiple thematic issues which require rounded and holistic approaches and solutions.

West London Context

3 West London Context

Introduction

3.1 The West London Partnership has prepared this Economic Development Strategy for West London. The Strategy describes a vision for the economic future of West London and the objectives that will need to be achieved to realise that vision. This is in the context that the Mayor's London Plan anticipates significant growth for West London, with thousands of additional homes and jobs forecast. The challenge, which this Strategy will contribute to meeting, is to realise the benefits this growth offers for people and businesses in West London in a way that is environmentally and socially sustainable.

Strategic Planning in West London

3.2 This Strategy builds on a long-term commitment by a wide range of partners in West London to strategic planning. In the 1990s West London partners produced two editions of a West London Economic Development Framework and in October 2000 West London partners published an Economic Manifesto for West London. This was a statement of strategic economic aspirations aimed at policy and decision makers in London.

Developing the West London Economic Development Strategy

The Process

3.3 In 2003 West London Business and West London Alliance, the two founding member organisations of the West London Partnership, made a proposal to the London Development Agency for the development of a new Economic Development Strategy for West London. This proposal was accepted by the LDA who have financially supported the production of the Strategy through their LDA2 programme. West London Business has acted as the project manager for the development of the Strategy on behalf of the Partnership.

3.4 This Strategy is a forerunner for the development of other sub-regional economic development strategies and sub-regional engagement programmes in London and learning from its development will be used by the LDA to inform the production of the other sub-regional strategies. It was developed concurrently with the London Economic Development Strategy which remains in draft at this time.

3.5 The Strategy has been developed through a process of research and analysis coupled with an extensive consultation programme. The first stage, a baseline research study, was completed in 2003 and reviewed with Partners at a major Consultative Conference in October

2003. A number of themes for development in the Strategy were agreed: Housing, Quality of Life and the Environment, Skills for Growth, Business Competitiveness, Land and Property and Branding, with Diversity and Sustainability as cross-cutting themes. Based on the results of this conference, other consultation with partners and following further detailed analysis, draft objectives and rationales were produced and agreed and, subsequently, a Draft Economic Development Strategy was produced. Further consultation involved written representations from public, private and voluntary sector partners, a second consultative conference in Spring 2004, a series of topic focus groups and an internet questionnaire. The results of this consultation process have informed the preparation of this final version of the Strategy.

The Strategy and the Wider Context

3.6 The policies and strategies of national, regional and local government form an important element of the operating context for West London's economy that has been taken into account in developing our approach. In particular, this Strategy has been developed in line with partners' strategies, and with the Draft London Economic Development Strategy and London Plan. We have taken account of the guidance and principles in the Sustainable Development Framework for London.

3.7 This Strategy seeks to develop and realise the Mayor's strategic objectives by providing framework through which they can be implemented. The research, analysis and policy formation that has been undertaken in the preparation of this Strategy is also being used to inform the preparation of the London Plan Sub-Regional Development Framework for West London.

3.8 However, to achieve a shared vision for West London some objectives and proposals in the West London Economic Development Strategy go beyond those of the Mayor's in terms of scale, level of intervention and time horizons. In this sense the Strategy is challenging in its ambition and aspirations. Indeed, one of the aims of the Strategy is to influence the operating environment for West London's economy – national, regional and local government law, regulation, policy, and strategy and resource allocation – that would enable earlier or more effective achievement of our objectives.

Implementing the Strategy

3.9 The lifespan of the Strategy will coincide with that of the Draft London Economic Development Strategy and it will be fully reviewed over the next year to ensure comparability with other sub-regional documents and the Final London Economic Development Strategy.

3.10 In consultation with partners and stakeholders in West London, the West London Partnership will produce an Implementation Plan for this Strategy setting out how the strategic objectives will be achieved.

3.11 Primarily, the Strategy will be implemented through the mainstream programmes and action plans of partner agencies such as the London Development Agency, Transport for London, the London West Learning and Skills Council, the West London borough councils, businesses and voluntary and community sector organisations. The role of the Strategy will be to improve the co-ordination and alignment of these programmes, including their allocation of resources, and positively influence their development and future direction in line with the Strategy.

3.12 The Implementation Plan will also identify where further research and analysis of the opportunities and needs of the West London economy is needed to support strategy and will set out where the partners believe that changes to local, regional or national polices and strategies are needed to improve the prospects of West London and the realisation of the vision.

3.13 The Implementation Plan will contain processes for its performance management and monitoring and set out how progress on the Strategy and Implementation Plan will be evaluated on a regular basis.

3.14 The role of the West London Partnership is to maintain and review the Strategy, develop the Implementation Plan, monitoring and evaluation processes and to ensure that all West London's partners and stakeholders are fully engaged in this. The WLP will formulate partnership arrangements with stakeholders to take overall responsibility for this and for ensuring the Plan contains clear deadlines and milestones, specific, measurable outcomes and evaluation criteria. In addition, through its own Work Programme and business plan, it will, where necessary, develop and deliver actions and initiatives under the Strategy Implementation Plan particularly where they are new, innovative or developmental and seek to influence local, regional, policy and strategy developments.

3.15 Information on progress will be published on the West London Alliance and West London Business websites and in the quarterly Stakeholder Bulletin which is distributed across the sub-region.

West London Partnership

The West London Alliance of the six West London borough councils and West London Business, the sub-regional business chamber for West London, formed the West London Partnership in 2000. In 2004 the West London Network for Voluntary Organisations joined the Partnership. The WLP's aims are as follows:

- promoting the social, economic and environmental well being of West London's communities
- promoting and supporting the competitiveness of West London's economy and its businesses
- promoting and raising the image and brand of West London and encouraging a sense of place and community in West London for both residents and businesses
- championing diversity and equality and community cohesion in West London
- providing community leadership for the residents and businesses in West London
- generating a vision for the kind of place that West London should be and proposing, supporting and evaluating the strategic objectives and interventions that will realise that vision
- providing strategic leadership in developing and co-ordinating regeneration and economic development policies and activities in West London
- lobbying on behalf of West London so that government and London agencies' policies and strategies are formulated in the best interests of West London and so that the maximum resources are made available to West London
- engaging in activities only when they are clearly sub-regional and not best done at a local, cross boundary or London-wide level.

3.1 Overview of West London

West London's Economy

3.16 West London possesses a number of unique factors that distinguish its economy from its neighbours and the rest of the UK. These include:

- Heathrow, the world's fourth busiest airport
- excellent export and import access through its international connectivity
- a significant creative industries sector throughout the sub-region, embodied by clusters such as the BBC studios and surrounding audio-visual cluster in White City and Park Royal
- some of the biggest blue chip organisations in the world, many of which have their headquarters located there, including GlaxoSmithKline - Diageo - Cisco - British Airways - IBM - BBC - United Biscuits - BSkyB - Kodak - Bechtel - Carphone Warehouse
- a significant concentration of employment within transport and logistics, particularly within air transport
- road, rail and air links to all parts of Britain.

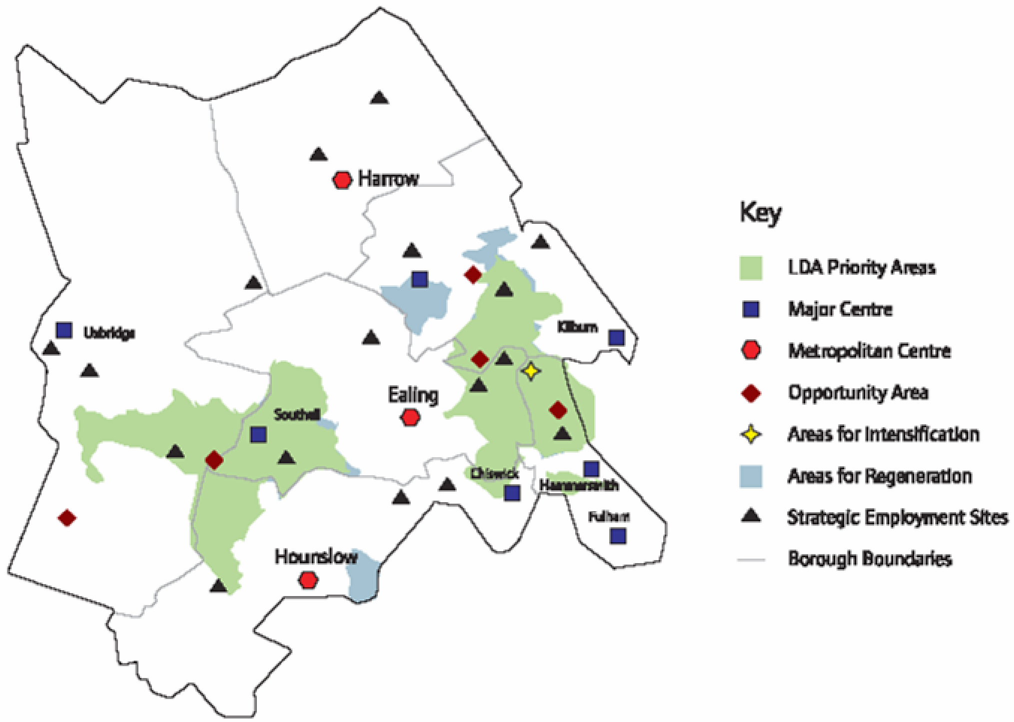
3.17 West London is a diverse and vibrant economy; it is a hugely important economy in the context of the London and South East regions. As an economy West London:

- contributes £27 billion to the UK economy
- has a population of 1,430,000
- has a richly diverse workforce
- employs ¾ million people with employment growing at a rate of 1% per annum[1]
- has an unemployment rate of 6.4% of the total working age population
- rewards its workers with higher weekly pay than the UK average (£564 – compared with a UK average of £474 and a London-wide average of £637)
- diverse BME communities, which experience far higher levels of unemployment than their white counterparts.

- [1] Growth rate based on figures between the years 1998 and 2002 (annual business inquiry data).

Figure 3.1 below highlights the key strategic areas within West London, as well as the main towns and local authority boundaries. More detail on the key strategic areas can be found later on within the document.

Figure 3.1: West London Sub-Regional Map: Key Strategic a Areas



Source: LDA Corporate Plan, 2004 - 07

Socio-Economic Context

3.18 Whilst an overview of West London reveals a relatively prosperous area the reality for some is very different. Significant pockets of deprivation exist within West London. This has been recognised by central government and the London Development Agency, which has identified a number of wards in the Hayes/Heston/Southall area (Heathrow City) and Park Royal/Wembley for programme intervention.

3.19 Table 3.1 below highlights the average score for the constituent wards of the West London boroughs. A higher score represents a more deprived area. The rank of the average score illustrates the relative deprivation that exists for some of the West London boroughs. Three of the six boroughs that form the West London sub-region are ranked amongst the worst in England, emphasising the deprivation that exists within their constituent wards.

Table 3.1: Index of Multiple Deprivation Scores 2005

	Average Score	Rank of Average Score (out of 354 localities)
Brent	25.95	81
Ealing	23.40	99
Hammersmith and Fulham	27.82	65
Harrow	13.50	232
Hillingdon	17.68	166
Hounslow	23.25	102

Source: ODPM

Environment and Quality of Life

3.20 West London enjoys a high quality environment, with large areas of open space, parkland and green belt land for leisure and recreation, with natural habitats and important biodiversity resources. However, West London's natural environment remains under pressure from development – population densities, transport levels and economic activities exert significant pressures on environmental quality in the area. The River Thames passes through the Boroughs of Hammersmith & Fulham and Hounslow, which – together with a range of canals and other waterways in West London – has been declared a Blue Ribbon Network by the Mayor (to promote their use for sport and leisure, whilst protecting biodiversity). There are also a series of valuable wetland habitats in the Colne Valley in North Hillingdon – a popular destination for recreational walking.

3.21 Transport is one of the biggest issues in West London. The public transport network is extensive, with a large number of underground, overland and bus connections with the centre of London. However road traffic congestion on major roads such as the A4, M4 and M40 remains a growing problem. Relatively large levels of car-based commuting bring associated noise and air pollution impacts to the area. A planned tram link and Crossrail are designed to help ease the congestion, and local authorities in West London have established planning frameworks that will favour the development of more sustainable transport patterns.

3.22 Heathrow is also a highly significant source of air and noise pollution (currently exceeding national air quality objectives). However, the advent of newer, quieter aircraft, the decrease in the defined area (0.35km-2 to 0.15 km-2 over the period 1996-2003) around Heathrow, within which aircraft noise may cause annoyance and the London Borough of Hillingdon's air quality action plan should act to ease the situation.

3.2 International Setting

West London in the Global Economy

3.23 More than ever before, global trends are relevant to local level economic prospects. The degree of flexibility in international industry and services is such that structural industrial changes on a global scale can impact on regional economies over a relatively short time frame. This is especially true for West London. Around 90% of the worldwide GDP is accessible from Heathrow (Estates Gazette January 2004) – this fact reaffirms the need for an international outlook for any Economic Development Strategy for West London.

3.24 West London has a number of global sectoral strengths, some of which are clearly linked to Heathrow. Such sectoral strengths include tourism; logistics; ICT; media and creative industries and food processing. Gateway Asia is a key initiative, developed by partners in Heathrow City led by the Southall Regeneration Partnership, to assist companies to increase sales and profitability by developing active trade links with South East Asia.

3.25 The following sub-section is intended to highlight the international opportunities and threats for West London, and as such does not reflect trends or characteristics of the West London economy itself, but instead focuses upon international trends and characteristics.

Global Trends – Local Opportunities

3.26 Arguably, the most important trends to examine are those taking place in sectors that are liable to changing fortunes and changing location. These are the sectors in which growth and investment opportunities lie and where threats to economic success exist. Local level retail and decentralised service activity may be a vital part of any economy, but these activities tend to achieve a degree of stability and their fortunes depend largely on the prospects of other sectors. These other sectors provide goods and services to be consumed primarily outside the local area. They tend to employ more people in fewer business units and add higher value to the economy.

3.27 The locational flexibility in the production of much of the world's output and the mobility of screen based service activities has had profound effects on the global economy. Many observers, particularly in the developed world, have been pessimistic about the impact this will have on high cost economies. In many industries the brunt of production is in the hands of a few, large firms. It is logical to assume that these multinational firms would seek the lowest cost bases. As developing economies started to win more and more manufacturing contracts, it seemed to many like one-way traffic.

3.28 The above view ignores the bigger picture of the world economy. There has been an eastward migration of much labour intensive activity. This has been a part, and a consequence, of a move towards wider international competition. In this environment a variety of locations retain competitive advantages. Developed countries, however, still dominate skilled manufacturing and high technology production. While the location decisions of much of the raw materials and unfinished goods production is based on reducing labour costs, further processing and production locations are more dependant on the quality of the workforce. However, other factors such as land values and access to new markets are also significant in choice of location. Knowledge-based industries where the latter factors are of less importance are sectors in which West London could develop and maintain a competitive advantage.

3.29 In the context of sustainable development, London takes up a disproportionate share of global environmental capacity, according to a study commissioned by the Mayor to measure London's 'Ecological Footprint'. The report concludes that, to be ecologically sustainable by 2050, Londoners will need to reduce their consumption of resources and production of waste by 85%.

3.30 A number of sectors have particular relevance to West London – a summary of global trends within certain sectors likely to affect the development of the West London economy is presented below.

3.31 The **creative industries** represents a particular sector in which West London is strong, and is likely to be increasingly influenced by international markets. Like many of the creative industries, the TV and radio market has been characterised by technological change and changes in modes of delivery. Digital television not only offers a clearer picture for the consumer, but also offers new methods of generating revenues for the industry. As a result mainly of advancements in technology, the TV and radio market size increased by more than 100% during the 1990s, including growth in both TV network distribution and TV programming.

3.32 Continued growth in the global TV and radio market is forecast for at least the next three to four years. Cable and subscription spending is expected to rise by around 8% per annum in the United States and 6% per annum in Europe between the years 2002 and 2006.

3.33 Within the creative industries, advertising is one of the sectors most closely linked to the overall performance of the economy. In times of recession the advertising budget is often one of the first to be cut by major businesses, and similarly as an economy grows advertising is seen as a quick way to enable a product to enter a flourishing market.

Forecasts predict that the dip in the global advertising market growth at the beginning of the millennium will be followed by an increase in advertising spending in line with overall economic growth throughout the United States and Europe.

3.34 A March 2003 Entertainment and Leisure Software Publishers' Association report suggests that the computer games industry is growing faster than ever, and the global market tripled in size between 1995 and 2003. The global console software market is expected to grow by 15% per annum over the next five years.

3.35 The beginning of the millennium saw a contraction in growth of the computer software and services sector, partly as a result of global economic conditions, and partly as a result of the 'dot.com' boom and bust. However, the market is expected to regain strength and display continued significant growth in output over the next few years. International Data Corp (IDC) estimates that compound annual growth in systems and applications software will exceed 10% between the years 2002 and 2005. Growth in North America, Western Europe, Asia/Pacific as well as the rest of the world will remain stable, with proportionally equal growth forecast across these regions.

3.36 **Biotechnology and pharmaceuticals** continue to be high-risk sectors but at the same time these are areas of potential growth. The developing world will achieve high growth rates due to mass-market chemical production. Developed countries will see modest gains attributed to high end, niche chemical production and scientific research.

3.37 The decline of the UK as a base for its own customer service operations has been overstated. Most commentators expect some further relocation of activity to the Indian sub-continent.

3.38 Whilst **logistics and transportation industries** have suffered as a result of global unrest, particularly in the case of the aviation industry, the short term-dip is expected to be a minor blip in a high growth international industry. Air passenger numbers, for example, are expected to rise steadily in forthcoming years. A rise in imports and exports are also likely to have a positive effect on these industries.

3.39 The **tourism sector is** likely to experience growth in the near future. Tourism is closely linked with global growth – as individuals' wealth rises so does their propensity to spend on recreation and other activities. Positive signs of recovery of the economies of the United States, Japan and Western Europe will only re-enforce the view that the prospects of the tourism industry are rosy. Attracting large scale international sports events (such as the potential London Olympics in 2012) can also have a significant impact upon tourist numbers. The growth in air passenger numbers expected in forthcoming years is also likely to have a positive effect on West London's tourism industry, as a natural consequence of the positioning of Heathrow Airport.

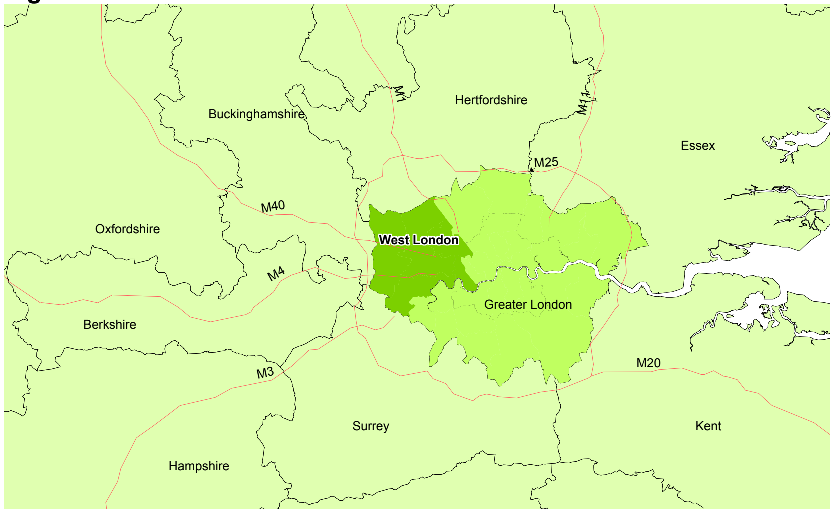
3.40 It is also important to recognise that much of the West London economy is *not* dependent upon export sales or interaction between the sub-regional and international economies. For example growth in personal and other services (as documented in chapter 4 below) is very much dependent upon the local economy. The key to developing the West London economy is finding the right mix between focussing upon high-technology, high value added sectors and the lower value added sectors that remain important to the sub-regional economy and provide considerable local employment opportunities.

3.3 West London and its Surrounding Regions

3.41 West London is located between the economically prosperous areas of Central London and the home counties of Southern England. West London has been characterised by its competitive position as it is very accessible in comparison to other sub-regions. London and South East England contribute 31.1% of the UK's economic output, despite comprising only 25.9% of the population. [2] It is these regions that drive forward the UK economy. West London contributes roughly 17% of the output of Greater London.

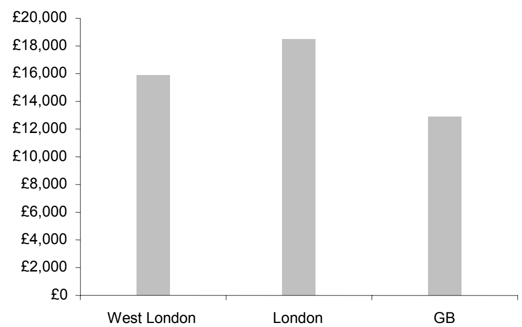
[2] 1999 GDP Figures from Regional Trends

Figure 3.2: Location of West London



3.42 Output per capita within West London exceeds the British average. However it is important to recognise that high earnings also create high prices. Housing costs in particular are higher in West London than most other areas in the UK, and hence real GDP per capita may be slightly lower than the output figures suggest. West London lags behind the rest of London in terms of per capita output. 1998 figures reveal that output per head in West London of £15,900 was some £1,600 short of the average level of output per head for London as a whole. Whilst 1998 data is somewhat old it is the most recently available and highlights the overall economic performance of the sub-region.

Figure 3.3: GDP per Capita 1998



Source: DTZ Locus

3.43 Similarly (as illustrated in figure 3.4 below) output per worker in 1998 for West London exceeds the British, but lags the London average. Again, if the data presented below were to be deflated using local price information we may expect that West London would perform much closer to the British average.

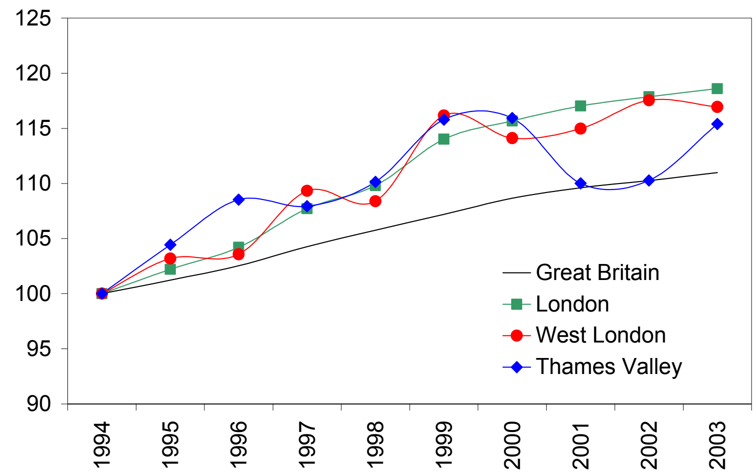
Figure 3.4: Output per Worker 1998

Source: DTZ Locus

3.44 In comparison with the UK as a whole, West London is an economically diverse and dynamic economy. However, whilst the West London economy may look relatively healthy, there are a significant number of economically deprived areas within the sub-region of London. As described in section 3.1 above, three of the six boroughs that form the West London sub-region are ranked amongst the worst in England in terms of the Index of Multiple Deprivation.

3.45 Over recent years, West London has witnessed considerable increases in employment and population. Figure 3.5 below highlights the employment growth that has been experienced by West London since 1994, exceeding national growth in employment, and mirroring employment growth enjoyed within London.

Figure 3.5: Employment Growth (1994 = 100)



Source: Labour Force Survey

3.46 Population growth in West London has closely followed that of Greater London in the past 10 years, and greatly exceeded population growth for Great Britain. By 2002 West London accounted for 19% of the Greater London population, a figure that has remained roughly stable in the past 10 years. Table 3.2 below illustrates population and population growth for Great Britain, London and West London and other London sub-regions between the years 1992 and 2002.

Table 3.2: Population and Population Growth

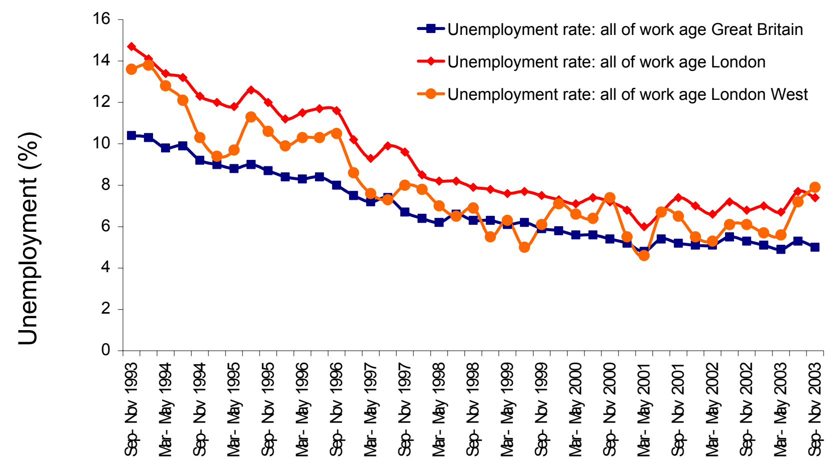
	1992	2002	Compound Annual Growth Rate 1992 -2002
West London	1,317,146	1,428,999	0.8%
Central London	1,417,745	1,536,187	0.8%
East London	1,857,416	2,008,424	0.8%
North London	979,326	1,050,508	0.7%
South London	1,250,958	1,331,236	0.6%
Thames Valley	757,037	803,566	0.6%
Great Britain	55,939,800	57,532,344	0.3%
London	6,822,591	7,355,354	0.8%

Source: NOMIS

3.47 Unemployment within West London has roughly followed the London average for the past 10 years, and despite a considerable fall in unemployment rates in recent years, West London still possesses a higher unemployment rate than the British average.

3.48 Whilst overall levels of health are not a particular concern within West London, areas of poor health can often be localised and concentrated. The 2001 Census revealed that 8% of West London residents considered their health to be 'not good' – a figure that fluctuated considerably when analysed on a ward by ward basis. Within the College and Old Park ward in Hammersmith & Fulham for example 10.6% of the residents described their health as 'not good' as opposed to just 5.4% of the residents of the Pinner South ward in Harrow. Improving the levels of health within the more deprived wards within West London would be a key driver to improving not just the economy within those wards, but across West London as a whole.

Figure 3.6: Unemployment 1993 to 2003



Source: Labour Force Survey

3.49 Long-term unemployment is also an issue within West London – as illustrated in table 3.3. Variations within West London are also of great concern. Within table 3.3 we can see that over one in every four claimants within Brent has been claiming benefit for one year or more. Compare this with Hounslow where less than 1 in 10 has claimed benefit for the same time period.

Table 3.3: Proportion of claimants claiming benefit for more than 12 months 2003			
Brent	26.4%	Harrow	15.3%
Ealing	16.4%	Hillingdon	13.4%
Hammersmith and Fulham	21.2%	Hounslow	8.2%
West London	18.7%	Great Britain	15.5%
Source: NOMIS			

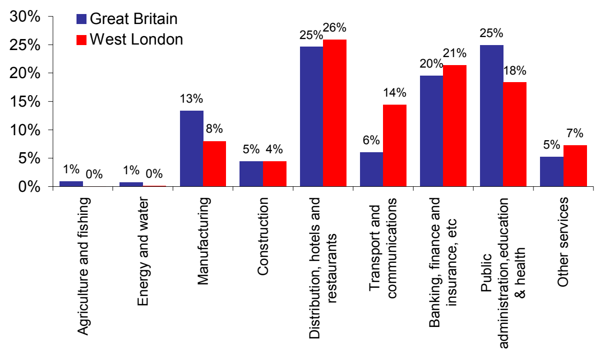
3.50 West London's above average performance with respect to Gross Domestic Product per capita has already been documented. As a result of this, we also find that West London possesses above average levels of earnings. Figure 3.7 below highlights the significantly higher levels of earnings found in West London in comparison with Britain as a whole. West London does, however, lag behind some of its neighbouring regions. East London in particular – boosted by the development of the Docklands area and the financial businesses on its western fringe – has considerably higher levels of earnings than those found in West London.

Figure 3.7: Gross Weekly Pay (Workplace Based) 2003

Source: New Earnings Survey

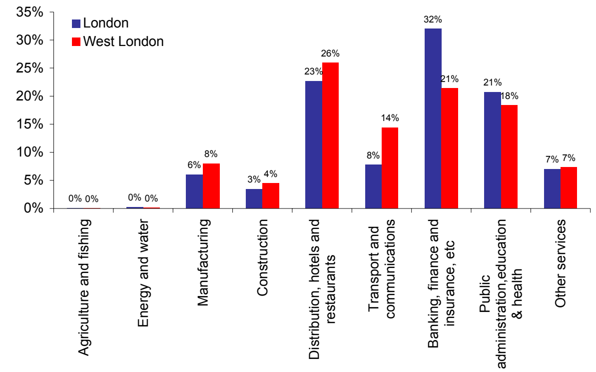
3.51 West London possesses a considerably larger proportion of employment within the transport and communications sector in comparison with Great Britain as a whole. As illustrated in figure 3.8a, 14% of all those employed in West London are employed in the transport and communication sector – compared with just 6% for the UK as a whole. Only two other broad sectors have a higher proportion of employment in West London than found across Britain as a whole – these sectors are distribution, hotels and restaurants and the banking, finance and insurance sectors. Figure 3.8b highlights the contrast in employment between West London and London as a whole.

Figure 3.8a: Employment by Sector 2002 (As a proportion of total employment)



Source: Annual Business Inquiry

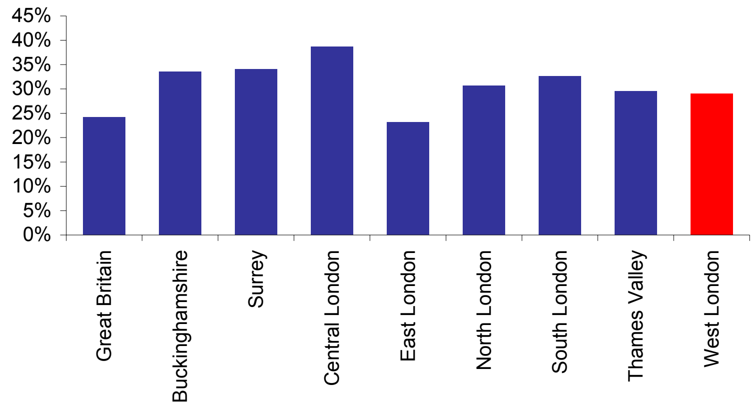
Figure 3.8b: Employment by Sector 2002 (As a proportion of total employment)



Source: Annual Business Inquiry

3.52 West London, like London as a whole, has a considerably higher level of residents with NVQ level 4 or above than the British average. As illustrated in figure 3.9 below, approximately 30% of residents in London and West London boast NVQ level 4 or above (or equivalent) qualifications – this compares with a figure of less than 24% for Great Britain.

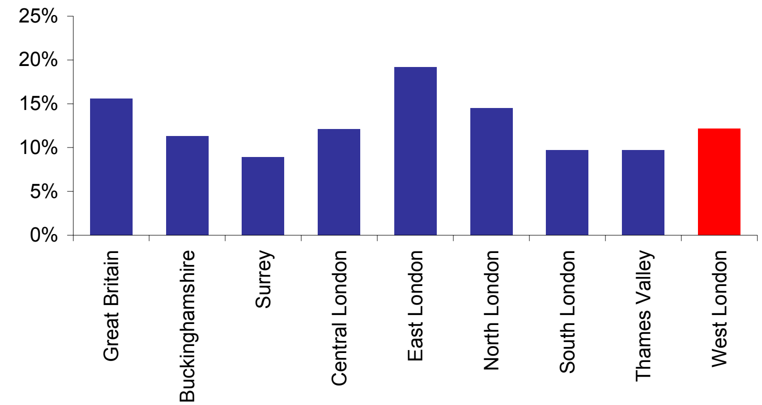
Figure 3.9: % working age population with NVQ4+ - working age 2002



Source: Labour Force Survey

3.53 At the opposite end of the scale we find that there are fewer residents in West London with no qualifications than can be found for London and Great Britain as a whole. Less than 13% of West London's residents have no form of qualifications. This compares with 15% of London's residents and over 16% of the residents of Great Britain.

Figure 3.10: % working age population with no qualifications 2002



Source: Labour Force Survey

3.4 Drivers

3.54 The power of Heathrow Airport means that it is an important driver of growth in West London. Table 3.4 below highlights those sectors that have displayed the highest levels of growth in recent years within West London. Employment within air transport has grown by 6% per annum between the years 1998 and 2002 – an increase of over 25% during the four year period. It is important, however, to note that the period post 2002 has been marked by a decline in activity within the air transport sector (particularly following the events of September 11th and the SARS epidemic in the far east) followed by a gradual recovery. High growth has also been experienced in the hotels and restaurants sector followed closely by growth in the real estate activities sector (where growth has followed the recent growth in UK house prices).

Table 3.4: Employment Growth (Compound Annual Growth Rate) 1998-2002

	West London
Air transport	6.0%
Hotels and restaurants	5.2%
Real estate activities	5.1%
Recreational, cultural and sporting	4.7%
Other service activities	3.7%
Manufacture of other transport equipment	3.6%
Education	3.4%

Source: Annual Business Inquiry

3.55 Tourism and the visitor economy is a major-driver of the sub-regional economy. VisitLondon, the Mayor's strategic tourism plan for the capital, highlighted the importance of London's tourism industry and outlined the framework for the development of the sector. The London Development Agency has developed the London Tourism Action Plan to achieve the goals of the VisitLondon plan and sub-regional tourism strategies are now being prepared. In West London the LDA is working with the West London Partnership to develop the Strategy and Action Plan which will support the development and promotion of a distinctive sub-regional tourism offer; set the priorities for tourism projects to be funded – in whole or in part – by the London Development Agency in the sub-region; and define an organisational structure for future strategic interventions in tourism.

3.56 Recreational, cultural and sporting activities are also an important driver of growth within West London. The new Wembley project epitomises the growth within these sectors. The completion of the new Wembley stadium will also mean the return of major sporting events to West London, including the FA Cup and play-off finals as well as England international football matches.

3.57 The voluntary sector provides a considerable level of employment within West London. Over 6,000 formal, active voluntary and community organisations are based within West London and currently employ 20,000 paid staff. It is estimated that the voluntary sector contributes around £380m in GDP terms towards the economy of West London, and that for every £1 of government grant income received by the voluntary sector it spends £6.60. The voluntary sector also provides unpaid employment for 140,000 people – which not only provides services for the people of West London but also provides a ladder for those currently unemployed to gain experience and employment.[3]

3.58 Social enterprise activities also act as important drivers for growth creating positive impacts including:

- employment and training opportunities for the most disadvantaged
- enabling individuals and communities to help regenerate their local neighbourhoods
- helping deprived communities benefit from the economic success of surrounding areas
- demonstrating new ways to deliver and reform public services.

3.59 The LDA's new Draft London Economic Development Strategy observes that Social Enterprise in London as a whole face a number of challenges and opportunities. A key objective of the LDA's Draft London Economic Development Strategy is to support the development of, and advice to, social enterprise and voluntary organisations. The LDA cited the following steps to improve the environment for social enterprises in London:

- greater political leadership
- better overall support infrastructure
- more creative financing mechanisms.

[3] Sustaining Success: Valuing the Impact of West London's Voluntary Sector

3.60 The London Assembly's Economic and Social Development Committee, in April 2004, identified the need for greater political leadership and better financial and business support in order to ensure that social enterprises realise their full potential.

3.61 It is important that the West London Economic Development Strategy also recognizes the importance of its social enterprises and ensures that it supports the potential positive impact that they may have on a local level.

3.62 The food cluster is another important driver of the West London economy, with particular concentrations around the Park Royal/Wembley area and Southall.

3.63 Other employment drivers in the West London economy include the key employment areas of Park Royal and White City. West London's specific sector strengths in media and the creative industries are becoming an increasingly important sector within the economy. Further analysis of employment growth is contained within section 4 of this document.

Permeability

3.64 West London is not a free-standing city. It is part of Greater London, one of the largest and most economically successful cities in the world. Much of West London consists of suburbs that grew in response to the need to supply labour to the older core industries and services. The suburban housing areas were linked by rail and tram lines back into the inner areas. The radial connections thus established still handle the bulk of movement beyond the West London sub-region.

3.65 But West London is not just a collection of suburbs attached to the parent city. It is also an area with substantial employment, business and services of its own. Some of these activities are not linked solely to the population of West London, but have catchments and linkages extending into other sub-regions, the Thames Valley, and further afield. The West London economy is highly dependent upon commuters from beyond the Greater London boundary. Heathrow in particular is not only a national hub but also Britain's most important international gateway. Accessibility to Heathrow is one of the key advantages for businesses located in West London.

3.66 Significant local economies have developed, often around a nucleus of an older village, or suburban centre, such as Hounslow, Southall or Uxbridge, and others with a more specific purpose and identity, such as Wembley and Park Royal. Some of these local economies have been subject to economic re-structuring, creating the need for regeneration and support.

3.67 Transport provision, and especially public transport, has not changed sufficiently in response to these developing economic and spatial patterns. Access to employment is difficult, interchange between different services is often poor, and travel to destinations other than Central London is often slow and unreliable.

3.68 Some attempts are being made, however, to address this problem. For instance, BAA and First Great Western are introducing Heathrow Connect in February 2005. At a cost of £30m, the service will provide two trains per hour between Heathrow and Paddington calling at Hayes, Southall, Hanwell, West Ealing, Ealing Broadway and Paddington. The service will enhance access to airport employment, specifically in food and retail, for local residents, specifically with the deprived wards of Southall and Hayes, either directly or via the local bus network.

3.69 At the same time, there are increasing demands on the existing transport system, including rail services to Central London. Peak hour trains are expected to be just as crowded in 2016 as they are today, even on the assumption that substantial extra capacity is provided with Crossrail.

3.70 One aim of the Strategy, therefore, must be to improve the ‘permeability’ of the sub-region so that travel within it, and to other areas, is more reliable, and more pleasant. This must apply to everyone, not just those with access to a car. The most important way of achieving this will be to develop transport facilities as an integrated network, where interchange between services is much simpler than today, and where the entire network of public transport services is presented and perceived as a single network.

Sustainability, Diversity and Health

3.71 Globalisation has seen mass movements of peoples as well as capital. West London is a primary point of entry to London and the UK, which is reflected in the fact that it is more ethnically diverse than anywhere else in the country. In recent times the Western sub-region has seen an influx of Irish, Polish and Punjabi communities, followed by Sri Lankans, East African Asians and Eastern Europeans. More recently people from the Middle East and the Horn of Africa have joined the evolving mix.

3.72 Describing West London as a diverse community is more than the wide range of ethnicities or spoken languages that may be observed. There are variations within groups and neighbourhoods which include indicators such the ratio of young persons to adults, individuals who have fled persecution or experienced trauma, differing levels of educational attainment, social class and differences culture which may not be perceptible. Some families may feel settled in a location while others will have aspirations to move on.

3.73 West London also has a growing population with a relatively high proportion of young people. The diversity of West London is a great strength and asset and provides many opportunities, and is particularly associated with the relatively high levels of entrepreneurship in West London in comparison with national levels of entrepreneurship.

Table 3.5: Ethnicity of Residents 2001

	White	Mixed	Asian or Asian British	Black or Black British	Chinese or Other Ethnic Group
West London	64%	3%	21%	9%	3%
London	71%	3%	12%	11%	3%
England	91%	1%	5%	2%	1%

Source: 2001 Census

3.74 Within this Economic Development Strategy it is important that we seek a fair and equitable outcome for all residents. Disadvantage affects people in many different ways, for example poor housing, low income, high crime environments, poor health and access to services. These problems can often lead to social exclusion. The sub-region also depends upon in-commuting for much of its workforce, and many of the residents in the sub-region find difficulty in accessing the labour market within the area.

3.75 It is imperative that this Strategy looks to fair and equitable outcome for all of the sub-region's residents, and outcomes which can be measured in terms of quality of life. Each theme of the Strategy has been subject to a rigorous critique in terms of whether it has addressed these issues in the visioning process and the Implementation Plan will translate the vision into actions and measurable outcomes.

3.76 The vision is about creating an environment where people can go about their lives with a feeling of dignity and security. This will involve balancing the needs, aspirations and cultures of different communities. The Economic Development Strategy celebrates and promotes cultural diversity and the contribution different communities have to make to life in West London.

3.77 A 'Community Cohesion' Pathfinder, funded by the Home Office, has been able to build on West London's successful experience of integrating diverse groups by promoting initiatives pre-empting for example the marginalisation of new migrants, as well as disaffected white youth.

3.78 As a reception point for new migrants, West London has a responsibility to absorb the impact of change and build on the opportunity this offers. At the very least the sub-region will benefit from the consequent growth of workers which are necessary to support and replace the current aging population. However there are other opportunities which flow specifically from celebrating cultural diversity and an appreciation of the potential different communities can make to life in West London.

3.79 It is also important to note that the West London economy is open to 'over-heating' as a result of constraints in the supply of land, labour and transport capacity. The reliance of West London on car-borne commuting, higher than any other London sub-region, is a particular challenge to a sustainable economy. For this reason, any sustainable Economic Development Strategy must look at the aforementioned aspects of the West London economy. For more detail on land, labour and transport issues that will impinge upon the sustainability of the West London economy, refer to chapters 4 to 9.

3.80 The challenges of changing lifestyles and sustainable growth need to be met by focusing more retail, housing, employment, community and leisure development around town centres, supported by improved urban design, a better quality, safer environment, and good public transport.

3.81 It is important that we recognise health as a cross-cutting theme throughout the West London Economic Development Strategy via two key strands.

- Improving health improves economic activity. Ensuring a healthy population not only helps to reduce economic inactivity, but also increases the productivity of the workforce – providing a healthy workforce reduces days lost to sickness, an issue highlighted by the CBI.

- Health and social care as a sector is a major employer within West London, and is likely to grow in importance. Increased government expenditure and an aging population means that spending within the sector is likely to rise at an rate greater than inflation for some time to come.

3.82 According to the latest labour force survey data 12,000 residents within West London are inactive due to long-term sickness. Clearly reducing the number of economically inactive residents within West London would have a significant impact upon the sub-regional economy. It is not just those economically inactive that have an effect on the economy. A CBI survey found that in 2003 176 million days were lost due to sick leave across the United Kingdom – equating to a loss of £11.6 billion for the nation. London fares well in comparison with other areas of the UK – averaging 6 days leave per employee as opposed to the national average of 7.2 days.

Environmental Sustainability

3.83 As London develops towards the Mayor's vision of an exemplary, sustainable world city, economic development and environmental damage are being 'decoupled' and real economic benefits are being generated from improved management of environmental resources.

Environmental Quality and Socio-Economic Development

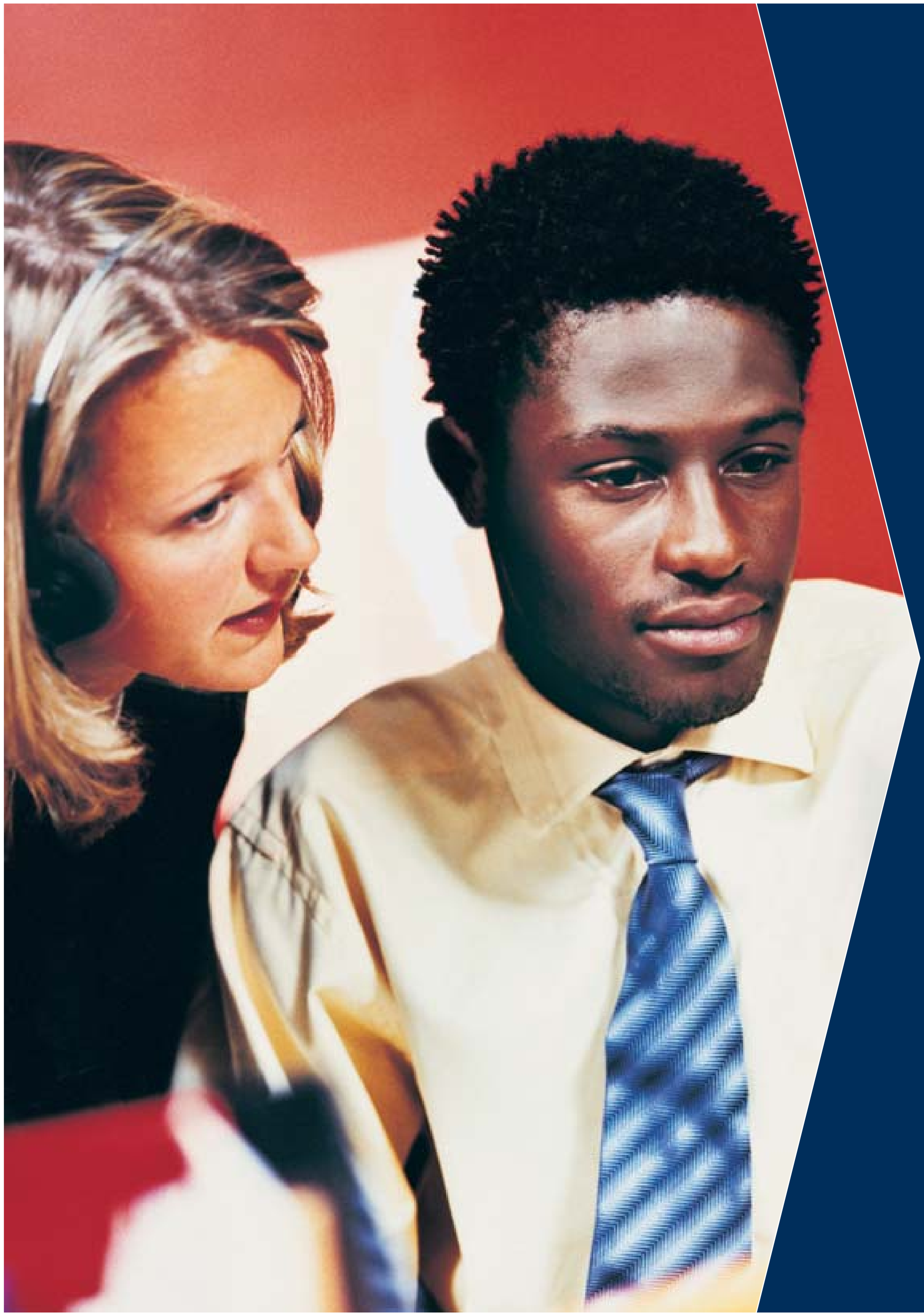
3.84 The process of economic and social development in West London is directly affected – promoted or hindered – by the quality of the local environment. Prevailing environmental conditions strongly affect local communities, their aspirations and their health, and as a result impact on their ability to contribute to the economy. The physical 'attractiveness' of areas and the presence or absence of environmental 'assets' (such as open spaces, watercourses, trees etc) are also crucial factors in the ability of areas to attract inward investment. West London's environmental assets have been essential elements in the area's economic success, and the preservation and enhancement of these assets will help to strengthen West London's economy.

Business Competitiveness

3.85 The efficient management of environmental resources, such as use of energy and raw materials, waste minimisation, procurement of recycled or 'environmentally friendly' products etc, can help to give businesses a competitive edge over their rivals. The Mayor's Green Procurement Code is just one London-wide initiative aimed at supporting businesses to improve their environmental performance and business competitiveness, and purchasing consortia which are being established in West London will enable businesses to benefit from better supply-chain management.

Environmental Goods and Services

3.86 The LDA has identified the environmental goods and services sector as presenting growth opportunities for London. Particular areas include waste processing, renewable energy and information/consulting. West London has its share of companies and research institutions operating in the EGS sector, and these are likely to act as engines for innovation and growth within the West London economy.



Skills for Growth

4 Skills for Growth

4.1 Background

4.1 Improving the overall productivity, knowledge base and competitiveness of businesses to improve employability and reduce social exclusion amongst West London residents depends largely on the development and utilisation of skills. The West London Economic Development Strategy needs to consider skills issues in light of the changing policy context, the evidence relating to the current skills and qualifications base of West London's workforce and residents, as well as the future skill needs of businesses.

4.2 The sub-regional Strategy needs to take account of the recommendations of the wider London Plan and the development of the Framework for Regional Employment and Skills Action, and to challenge these if our assessment of local needs is at variance with their conclusions.

4.2 Strategic Context

4.3 At a national level, the Government's Skills Strategy White Paper, *21st Century Skills: Realising Our Potential*, highlights that skills are a key asset which impact positively on productivity, innovation, profitability and, ultimately, the competitiveness of businesses. Skills are increasingly important for individuals' employability in an era when 'jobs for life' have largely become extinct.

4.4 The LDA recently produced their Draft London Economic Development Strategy. *Sustaining Success: Developing London's Economy* lists the following objectives under the Investment in People Theme.

1. **Tackle barriers to employment**
    - Improve accessibility, affordability and availability of childcare.
    - Act to reduce and, where possible, eradicate barriers to women, disabled people and those from black and minority ethnic backgrounds entering employment in high-level positions.
    - Increase the accessibility of lower paid employment through better use of in-work support.

- Encourage the expansion of flexible and family-friendly employment practices in the public and private sectors.
- Support active labour market approaches to developing pathways to employment.
- Improve the standard of training and business support to meet the needs of the wider community.

2. **Reduce disparities in labour market outcomes between groups**
   - Ensure that employment programmes proportionately benefit disadvantaged groups in London.
   - Target interventions to address specific barriers to the labour market faced by particular groups.
   - Ensure that all London's employers are ready to implement Part III of the Disability Discrimination Act.
3. **Improve the skills of the workforce**
   - Promote and improve links between education and business.
   - Make the case for increased educational resources, particularly to help those facing additional economic burdens, including women, black and minority ethnic groups and disabled people.
   - Support training for those re-entering employment after periods of inactivity, promote progression and ensure sustainability of outcomes.
   - Ensure London businesses are fully engaged in identifying skill needs and developing provision and initiatives to address them.

4.5 The London West LSC is currently undertaking a two year strategic area review, which is due to be completed in 2005. This review will highlight specific plans to meet the needs of learners and workers. It will also outline the way in which the LSC will work with key partners to seek and ensure that the options arising out of the review are achieved.

4.3 Key Issues

4.6 The skills base of West London residents is relatively polarised in nature with a relatively high proportion of individuals qualified to level 4 or above accompanied by a relatively large proportion of individuals with low-level skills and / or basic skill difficulties. This to a large extent creates a dual economy; the high-skill, high-pay economy and the low-skill, low-pay economy. However the proportion of residents with low skill levels is not evenly distributed across West London, indeed areas such as Hammersmith and Fulham for example have the eighth lowest proportion of residents with low qualifications in England. On the other hand the highest incidence of low qualifications in West London occurs chiefly in South Hillingdon and West Hounslow. In eight wards across West London over half the adults have no qualifications above level 1.

4.7 The West London population is made up of a rich diversity of communities with over a third of the population being classed as BME British. The degree of diversity reflects largely the migration patterns of the area over a number of years and West London has attracted a number of immigrants to the area which have formed strong BME communities. Most of these communities are now well settled and fully integrated in the area and consist of second or third generation individuals. Many of the individuals within these communities are highly skilled and qualified. Indeed most young people from Asian communities perform better at school than other pupils of their age.

4.8 Within West London, migration patterns have, however, also contributed to the dual economy. While a large proportion of the new immigrant population often arrive in West London with high qualification and skill levels, a large number also arrive with few qualifications and end up in low-paid work. At the same time, the migration of highly skilled and highly paid 'city' workers into West London suburbs has also taken place and the combined effect is an increased polarisation of skill levels which contribute to the dual economy. Encouraging and increasing the number of local people employed within the West London sub-region has positive benefits not just for the economy but also the environment, and should increase the quality of life for those residents in West London.

Table 4.1: West London wards with the highest proportions of adults with low-level qualifications 2001[4]

Ward name	Borough	% of adults	Rank in West London (123 wards)	Rank in London (633 wards)
Hanworth	Hounslow	56.2%	1	28
Feltham West	Hounslow	54.6%	2	38
Feltham North	Hounslow	54.3%	3	39
Bedfont	Hounslow	53.4%	4	41
Northolt West End	Ealing	52.7%	5	46
West Drayton	Hillingdon	51.9%	6	53
Townfield	Hillingdon	51.0%	7	64
Hanworth Park	Hounslow	50.8%	8	66
Botwell	Hillingdon	49.7%	9	85
Charville	Hillingdon	49.0%	10=	96
Pinkwell	Hillingdon	49.0%	10=	97
Averages				
London		36.7%		
England		45.5%		

Source: 2001 Census of population

4.9 On average across the West London area 14% of the adult population has no qualifications, and over a fifth of the population has poor literacy or numeracy skills. As discussed in more detail below, low skill levels and basic skill difficulties not only create barriers to employment for those currently unemployed or inactive, but also create potential progression barriers for those currently in employment.

[4] Adults covered are persons aged 16 to 74 only; low-level qualifications are those at level 1 or lower

Table 4.2: Proportion of West London residents with poor literacy and numeracy skills by borough 2000

Unitary Authority	Total with Poor Numeracy (%)	Total with Poor Literacy (%)
Brent	23.0%	23.0%
Ealing	23.8%	23.9%
Hammersmith & Fulham	21.7%	21.4%
Harrow	18.6%	19.4%
Hillingdon	22.0%	21.9%
Hounslow	24.1%	23.6%
National Average	*24%*	*24%*

Source: Basic Skills Agency, 2001

4.10 The degree to which West London attracts new immigrants, asylum seekers and refugees has real implications in terms of English language skills. Clearly this does not apply to all new arrivals by any means, as many overseas immigrants have excellent English language skills as well as other skills and qualifications. Nevertheless, a significant proportion of new arrivals lack proficiency in the English language which is likely to constitute a significant barrier to entering employment, regardless of other qualification and skill levels.

4.11 On the other hand, the range of language skills held by these individuals widens the overall skill base of the area and in itself offers a number of potential benefits and opportunities. Furthermore, a number of refugees and asylum seekers are highly qualified with many possessing high level professional skills and qualifications which may not necessarily be recognised in the UK. This demonstrates a high degree of ability which could be utilised in a positive manner. In short, although the diverse cultural base and high degree of asylum seekers within West London creates some potential concerns regarding English language skills, such diversity also creates a number of opportunities based upon the range of language skills generated, as well as the degree of potentially under-utilised skills and abilities that exist.

4.12 An example where such language skills can be utilised is within the health sector, where it is important that both the supplier of healthcare and those needing treatment are able to converse fluently in the same language.

Improving the pathways to employment

4.13 One of the key areas to be addressed within the thematic area of skills within the West London Economic Development Strategy is to encourage those individuals currently excluded from the labour market back into employment. Lack of English language skills amongst some of the minority ethnic jobless may be a barrier to employment and the potential lack of general employable skills amongst some of the socially excluded groups, including the homeless and ex-offenders, illustrate areas where support is required to develop the skills and confidence to enable them to become employable.

4.14 Young offenders in particular face a number of barriers to education and training. The London West LSC Needs Assessment document identifies issues such as poor access to support services and suitable courses, an absence of policies governing the employment of ex-offenders and poor basic skills to be the main barriers which they face. Support services such as Minority Ethnic Outreach (MEO) and the London Homeless Service Team do currently exist and provide some of the support and service required to address these issues. The West London Economic Development Strategy should aim to build further on these current successful initiatives in order to enhance the employment opportunities of potentially excluded groups. The Strategy should also recognise that some target groups will require longer-term support or higher levels of intervention to help them access adequate employment. Actions developed to address pathways to employment should recognise this as well as ensure adequate involvement from the business community.

4.15 An effective strategy will have a preventative element, as well as elements that address already existing social exclusion issues. While the process of economic development will reduce the severity of inequalities and the degree of alienation, the Strategy should in particular target those groups seen to be at risk of social exclusion and alienation, as well as assisting individuals who have already 'dropped out'. The voluntary and community sector has a potentially important role to play as effective intermediaries who are often the closest to potentially excluded individuals.

4.16 Improving pathways to employment is also particularly relevant to individuals who wish to return to employment but face practical barriers. This includes parents who want to work but first require accessible and affordable childcare. Other prospective workers are often prevented from gaining paid employment due to a lack of a suitable means of transport, which prevents them from even considering or applying for some jobs. This is particularly applicable to jobs associated with anti-social hours when public transport services are limited, or jobs located in areas that require travelling either north or south across West London. Developing skills to reduce involuntary unemployment must therefore be addressed in conjunction with other barriers to employment. Removing barriers to employment as well as improving skill levels are key parts of the wider London Plan. A number of programmes are being developed to connect people, places and businesses. For example, building on the Heathrow Connect service, the 'Routes to Work' programme in Heathrow City comprises a number of strands to assist local residents overcome barriers to employment.

4.17 Developing good pathways to employment for those currently unemployed or inactive to some degree goes hand in hand with achieving equality in accessing opportunities and achieving a more even distribution of prosperity. Ensuring that employers adopt an adequate equal opportunities policy that offers equal employment and progression opportunities for ethnic minority individuals as well as other disadvantaged groups including lone parents and the disabled is therefore essential. Although the proportions of employers adopting equal opportunities policies across the five London LSC areas are similar, it is worth noting that the lowest proportion of employers adopting such policies is recorded in West London (see table 4.3).

4.18 Employers are beginning to take such issues seriously as more research suggests that perceptions of corporate social responsibility impact on consumer and investor behaviour. The Corporate Social Responsibility (CSR) Monitor, carried out annually by Globescan, shows that the UK has a high level of ethical consumer activism. Establishing a reputation for socially responsible practice can increase a business' competitiveness through attracting socially aware consumers and investors. The more employers in West London who recognise this, the more widespread appropriate equal opportunities policies will become.

4.19 Education Business Partnerships (EBPs) are one means by which employers can increase their social responsibility. EBPs promote and sustain links between education, business and the wider community to enhance the quality and relevance of the curriculum and assist young people in developing to the best of their ability those skills necessary for adult and working life. The West London Economic Development Strategy should support such activities by supporting EBP programmes, mentoring and partnering schools, supporting work experience opportunities, participating in vocational training with schools including young apprenticeships and investing in academies.

Table 4.3 Proportion of employers with an equal opportunities policy 2002

	%
All employers	71
LSC Area	
Central	71
East	73
North	70
South	71
West	68

Source: London Employers Survey 2002

Workforce Development Training

4.20 The London Framework for Regional Employment and Skills Action (FRESA) outlines that future skills and employment needs of the economy will be at an increasingly high level, predicting that 46% of all jobs by 2010 are likely to demand skills at NVQ level 4 or above. This is partly due to the increasing focus on the development of the knowledge economy and the continued and rapid movement away from production towards services. As such, it will be increasingly important to encourage greater participation in learning across the spectrum and to encourage a greater ethos of lifelong learning amongst existing employees. Indeed, as recognised within the London framework document, developing the skills of the existing workforce is key to achieving the FRESA vision.

Addressing current skill gaps

4.21 The London West LSC Needs Assessment 2003 recognises that although a proportion of workers and residents within West London are qualified to level 4 or above, there remain too few with qualifications at levels 2 and 3. The relative gap in skills at this level potentially acts as a brake on the productivity and overall competitiveness of businesses. Generating sufficient demand for work-based learning aimed at driving up these mid range skills and qualification levels therefore form an essential element of addressing the skill development needs of businesses. From the table below it is clear that employers across West London record the lowest training spend per employee in London. This would suggest that employers in West London do not value the potential gains from workforce training investment to the extent that some other areas do. Indeed, the average spend on training per employee in West London is below the London average and is significantly lower than per employee spend recorded across all other London LSC areas.

4.22 The Sustaining Success, V*aluing the Impact of West London's Voluntary sector* report, outlines that the voluntary sector spends £5.4 million on training. For a sector that employs 20,000 across West London, this amounts to an annual training spend of £270 per employee, far greater than the West London average. Indeed according to the report two thirds of all voluntary organisations in West London provide training for paid staff and almost half (46%) train volunteers while over a quarter (26%) train trustees. This evidence indicates that the voluntary sector places a higher value on training compared to most other sectors across West London.

4.23 The issue extends further than that for individual employees who only possess level 1 qualifications or even no qualifications. For individuals in these positions, the rate of return to training aimed at achieving a moderate increase in qualification levels is often less visible, as the costs are perceived to be greater than the benefits. Encouraging the demand for training investment amongst these individuals, therefore, is often more difficult. Individuals qualified to only a relatively low base often encounter career progression ceilings. On the other hand, individuals with higher level qualifications tend to be equipped with skills that enable them to be more adaptable to change and as a consequence are often more able to capitalise on career progression opportunities. As a result much of the workforce development training is aimed at individuals who are already qualified to a relatively high level, except in sectors such as care or construction where statutory requirements compel employers to train at all levels.

4.24 Efforts should be made to improve the visibility and therefore appreciation of the rates of return generated by training aimed at low skilled individuals. Enhanced appreciation of, and as a consequence demand for, training could be achieved through initiatives aimed at reducing training costs and therefore enhancing the visibility of the returns. Pilot initiatives in 12 areas across England aim to generate increased demand for workforce development training of this nature through various cost reducing incentive schemes. The pilot initiatives are currently being evaluated by the Institute of Employment Studies (IES), and lessons emerging from the evaluation findings should be considered within the implementation of similar programmes in West London.

4.25 Supporting employers to recognise their current and future skill needs will also improve the visibility and appreciation of the value of workforce training at all levels. Employers, especially small businesses, should be supported in the process of monitoring skill shortages in order to encourage further workforce development investment.

Table 4.4: Variation in average spend on training per employee 2002

	Average spend per employee £
All employers	239
LSC Area	
Central	248
East	235
North	274
South	231
West	209

Source: London Employers Survey 2002

4.26 An additional barrier exists for individuals with basic skills difficulties. For many of these individuals, the lack of literacy and / or numeracy skills creates a barrier to other training participation. Many employees with basic skills difficulties are often reluctant to admit that they have such difficulties and prefer to avoid training opportunities than address their basic skill development needs. The roles of Union Representatives within unionised workplaces offer the opportunity to encourage these individuals to address their basic skill needs in a non-threatening manner. Indeed Union Representatives have the opportunity to identify a number of skill needs within workplaces, especially amongst low skilled workers, and as such have the potential of stimulating further demand for work-based training at this level. This only applies to workers within unionised workplaces, which in the case of West London is in the order of 25% of all workers.

4.27 The LDA Draft London Economic Development Strategy emphasises the need to ensure London businesses are fully engaged in identifying skill needs and developing provision and initiatives to address them. It must be made clear to West London businesses that appropriate workforce development structures will not only improve their reputation as employers but will lead to their company being perceived as socially responsible.

4.28 As outlined in the business competitiveness section of this document, the West London business base consists of a relatively large proportion of micro businesses (employing between 1 and 10 employees). The London West LSC recognises that there is a direct correlation between the employment size of businesses and the degree to which businesses participate in workforce development training. This is largely due to the fact that micro businesses encounter additional barriers to training including:

- fewer resources to allocate to training needs
- less internal labour mobility to enable staff to be released for training
- weaker / less formalised links with training providers
- information mismatches regarding the training needs of employees
- the training opportunities available.

As such the vast majority of West London businesses require additional support to overcome these barriers.

Addressing potential skill shortages to meet the changing needs of priority growth sectors

4.29 As well as stimulating the demand for workforce development training that meets current skill requirements, it is also essential that this Strategy document considers the future and changing skill requirements of emerging growth sectors within the West London area. The London West LSC identifies in its first Local Strategic Plan a number of sectors that are particularly important in the West London area. They are:

- hospitality and leisure
- engineering
- construction
- retail
- health and social care
- media
- transport and logistics
- information technology (cross sectoral).

4.30 As well as these identified key sectors there are currently a number of sectors that have hard to fill vacancies (see figure 4.1). These include banking and finance and distribution hotels and restaurants. It is essential that any barriers to filling these vacancies relating to skill shortages should be addressed by appropriate training and education provision.

4.31 It must also be realised that charting skills needs within private industry alone will provide an incomplete picture. The skill needs of the voluntary and community sector must also be taken into consideration as those employed within the sector make up 2.4% of the West London workforce.

4.32 The Strategy must also engage the public sector as it is one of the largest employers within West London, accounting for almost one in five of all employment opportunities (see table 5.1 of the Business Competitiveness section). Establishing and fulfilling skills needs in the public sector will benefit public sector agencies, current and prospective employees, and will contribute to the quality of service provision in West London.

4.33 The London West LSC Needs Assessment 2003 outlines key recommendations associated with a number of these sectors. For **the engineering manufacturing sector** the document recommends:

- a focus on the development of generic skills
- skill audits for businesses operating in the sector to identify current skills gaps
- developing better links between businesses and providers
- raising the awareness of training benefits
- raise the awareness of employers within the sector to training opportunities.

4.34 As already stated, **the media and creative industries** are becoming an increasingly important sector within the West London economy. Connections with the creative industries are probably strongest within Hammersmith and Fulham due to the presence of the BBC at White City. As the BBC is also planning to relocate all employees from Central London to Shepherd's Bush/White City during the next year, the presence of the sector in the area will naturally increase further. A number of specific skill shortages have also been cited within the sector, especially in the following areas:

- broadcasting engineering / cable and satellite
- film animation and commercials
- interactive media, facilities and corporate production.

4.35 The London West LSC recognises that efforts to increase employer engagement, develop and fund training provision and drive up the quality of work-based learning must include clear responses to the needs of these sectors if it is to be successful in achieving its objectives.

4.36 Despite this, the continual shortage of staff within the **healthcare sector** in West London is a cause for concern. Not only does the shortage restrict growth within the sector, but it also affects the provision of healthcare within the sub-region. Staff shortages cover all occupations within the sector – North West London NHS Workforce

Development Confederation report significant staff shortages of middle and senior grade, particularly clinical, staff who have transportable skills and qualifications.

4.37 Skills shortages in the **construction industry** in London have been described as chronic by the London Development Agency. The number of big construction projects in the pipeline in London is considerable including the National Stadium and Heathrow's T5. There is the potential that shortages in skilled labour in the industry may prove a considerable headache for the residential construction industry in London over the next few years (*Source*: Market failure and the London housing market, GLA Economics, May 2003). These rapid expansions within the industry create additional demands on skill requirements across all areas of the sector. For example, the Terminal 5 construction programme, which started in September 2002, encompasses 16 major projects. Over the construction period, the programme will generate over 16,000 person-years of employment, with a workforce that peaks in 2005 at around 5,000. BAA, in partnership with other stakeholders, in making a significant investment through its local labour strategy to increase the ability of the local area to meet the workforce requirements of the airport

4.38 Desperate skill shortages being experienced in the construction sector are being partially answered by the availability of young eastern European casual workers, amongst others, with manual skills. So, for example, there is a need for dedicated refugee employment initiatives in West London which have an understanding of forecast skills shortages, are able to accredit existing skills and academic qualifications and encourage employment opportunities which are not exploitative. This will require an ongoing dialogue with the private sector and educational institutions.

4.39 According to the London Tourism Action Plan 2003/2004, critical to offering a world-class tourism product is the need to offer visitors truly exceptional standards of service. Research undertaken by the London Skills Forecasting Unit indicates that London's hotel and catering sectors suffer from rapid staff turnover and specific skills shortages. The forecast increased capacity of tourism supply in London, through geographical spread of the tourism product, will require a more co-ordinated investment in promoting employment opportunities, development of training and other programmes to increase quality and staff retention levels in the sector.

4.40 It is essential that a full understanding of the emerging skill needs of these sectors is gained and that provision is aligned and planned to meet them. The demand for training within some sectors, such as construction, outlined above already outstrips the supply or provision. In particular London West LSC has identified the following specific issues relating to the sector

- existing training is not meeting requirements
- more part-time and weekend requirements
- need to engage women, black and Asian workers who are under-represented in the sector.

4.41 Ensuring that the supply of training opportunities meets the needs of businesses is not just about ensuring that courses based around the relevant subject areas are provided, although this is clearly an important factor. The delivery of these courses is also an essential element as employers increasingly require more flexible training delivery modes. Employers often require training provision that fits around the operation schedules of their business, to cater for shift workers and / or part-time employees. This may require training provision delivered during evenings and / or weekends etc. However, training providers and colleges currently find it difficult to offer the degree of flexibility that employers desire due to funding stipulations.

4.42 It is essential that the West London Economic Development Strategy works with its partners and stakeholders including the voluntary sector to ensure that employers audit and become aware of their own skill gaps and training needs. In addition, the Strategy must aim to ensure that work-based training provision adequately meets these demands and is delivered in a manner that stimulates sufficient participation.

4.43 West London can be regarded as a successful area in many respects, however, the area does not fully realise its innovative potential, which in turn acts as a brake upon the overall growth and performance of its economy. This inability to fully harness this innovative potential stems from the apparent gaps that exist in terms of innovation and knowledge transfer.

4.44 Knowledge and expertise held within Higher Education Institutions (HEIs) is often embedded and the transfer and exchange of such knowledge is often limited. Higher Education Institutions often have excellent facilities that could be very beneficial to private sector businesses and entrepreneurs as well as researchers and innovators. Forging strong links between HEIs and private sector enterprises creates the potential to enhance knowledge exchange opportunities. The Draft London Economic Development Strategy encourages improved links between education establishments and business and the WestFocus partnership seeks to ensure that the knowledge, expertise and resources of West London and the Thames Valley are fully realised.

4.45 WestFocus is a flexible partnership involving seven HEIs, led by Brunel University, extending in an arc from the M40 to the North around to the A3 in the South West of London. The main objectives of WestFocus are to encourage innovation and entrepreneurship through the exchange of knowledge; support the creation and growth of successful businesses; ensure that existing knowledge, expertise and best practice is capitalised upon; integrate and improve access to facilities and services in order to improve the commercialisation of knowledge and to ensure that higher education is relevant to and linked to innovation.[5] The WestFocus Partnership has recently secured £10.6m government funding for the development of partnership activities to support knowledge exchange between higher education (HE), business and the voluntary sector in West London, specifically in the areas of health, manufacturing design, environment and ICT.

4.46 Details regarding the nature of the gaps in innovation and knowledge transfer are highlighted in the business competitiveness section of this document. However, it is worth emphasising again here the lack of effective technology and knowledge transfer identified by the WestFocus review across West London despite the apparent strength in research and development employment (See figure 5.13 in the business competitiveness section). It is also worth noting that this state of innovation review revealed underdeveloped intermediary support structures within the area which could act as a 'bridge' between HEIs and business sectors. It is these gaps amongst others that the WestFocus partnership aims to address.

4.47 The West London Economic Development Strategy should support the aims of the WestFocus partnership and ensure that the knowledge exchange opportunities that arise from its development are fully utilised by ensuring that the outcomes of the partnership activities address the needs of West London businesses.

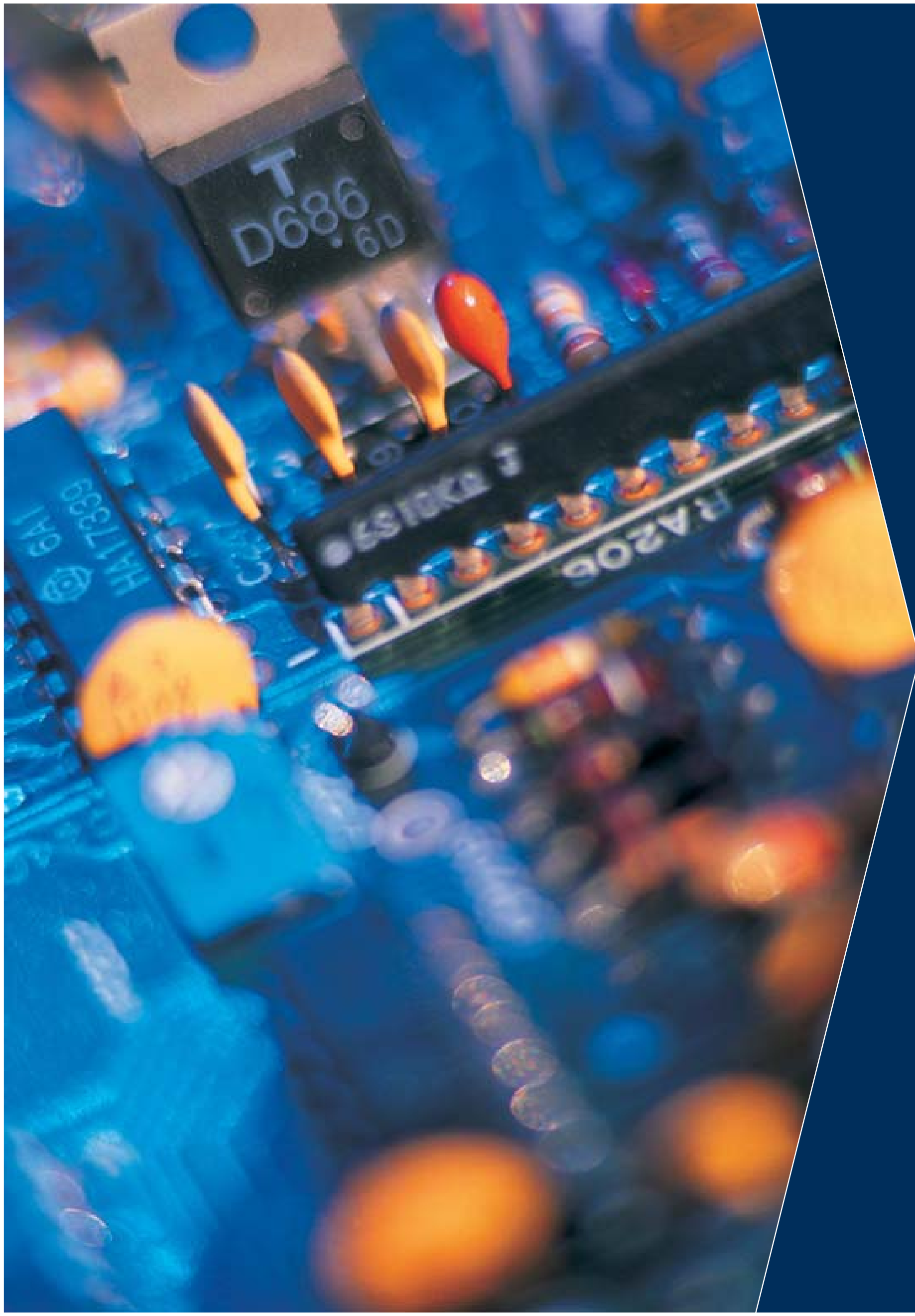
4.48 The Strategy should also focus on encouraging stronger links between educational institutions and businesses, particularly small businesses, in order to encourage the development of higher level skills amongst employees. Encouraging closer coordination between HEIs, FEIs, the LSC and the community and voluntary sector would also aid medium term skills investment plans.

[5] See section 4: Business Competitiveness for objective relating to academic and business links.

4.4 Objectives and Rationale

Objectives	Rationale
1. Focus skills provision based on identified skills gaps and needs of key and emerging sectors in West London.	The Government advocates a demand-led approach to skills provision. Skills provision should be targeted at local skills shortages in West London's key sectors.
2. Create comprehensive, innovative and joined up provision of English for Speakers of Other Languages (ESOL) courses ensuring that it is sufficiently workplace-focused and accessible to hard to reach groups.	An estimated 60,000 refugees and asylum seekers live in the sub-region as well as a number of BME individuals with little English language skills. Language skills are usually necessary to overcome barriers to employment.
3. Improve numeracy and literacy skills amongst schoolchildren and the adult population.	Over a fifth of the West London population have poor literacy or numeracy skills, constituting a significant barrier to accessing local employment.
4. Address the current workforce skills gaps across level 2 and 3 qualification levels.	There remain too few individuals across West London with qualifications at levels 2 and 3. The relative gap in skills at this level potentially acts as a brake on the productivity and overall competitiveness of businesses.
5. Seek to offer support to increase the demand for workforce development training amongst West London employers, in particular SMEs, micro businesses and community and voluntary organisations.	The West London business base consists of a relatively large proportion of micro businesses that encounter a number of barriers to participating in workforce development training.

6. Help foster a culture of workforce development within the private, public and voluntary sector in West London.	It is generally accepted that providing skills and training for employees will lead to increases in productivity. Workforce development also fits into the wider 'lifelong learning' agenda. Workforce development also improves employer's reputation and demonstrates that they are socially responsible.
7. Remove barriers to improve training access and employment opportunities for currently excluded groups and excluded and disadvantaged pupils.	Groups such as single parents, the disabled, non-English speakers, migrants and ex-offenders are often excluded from training and education participation as well as employment opportunities.
8. Encourage further development in the lifelong learning culture in West London.	The need for individuals of all ages to develop new and updated skills and ensure that existing talents are not under utilised.
9. Ensure that skill development programmes meet the changing skill needs of businesses and are sufficiently flexible to meet business access requirements.	The West London business agenda aims towards expanding activity within the higher value sectors; skill development strategies should aim to complement these business aims and objectives.



Business Competitiveness

5 Business Competitiveness

5.1 Background

5.1 West London lies within the heart of the UK's most competitive regional economies. On its eastern edge is Central London, by far the UK's most productive region and also the focus of knowledge-based business activities in the UK. To the south and west of West London are Surrey and the Thames Valley which are key drivers of the UK's high-technology sectors. Although West London forms part of Greater London, the influence of the surrounding areas outside the London region should not be ignored. Motorway links bring West London close to the neighbouring Thames Valley area, with the M4, A40 and M25 providing important linkage routes. The location of Heathrow on the 'border' between West London and the Thames Valley area should also promote economic interaction between the two neighbouring sub-regions. West London is also a highly diverse area – over 200 languages are spoken within its boundaries.

5.2 Strategic Context

5.2 In terms of sectors, if the West London economy is to be differentiated from other sub-regional economies, it is the high level of employment within transport and communications that affords this differentiation. In Heathrow, West London has one of the world's busiest airports, but also has a particular concentration of employment within the distribution, hotels and restaurants sector.[6]

5.3 West London employs a small proportion of its workforce (in comparison with neighbouring sub-regions) within banking, finance and insurance. In relation to surrounding areas West London employs a smaller proportion in public sector activities, although this does equate to 18% of the total workforce.

5.4 Despite having a relatively low proportion of employment within finance and related industries, these sectors account for almost one-half of all vacancies within local job centres in West London. The other sectors that currently experience high levels of vacancies are distribution and hotels and restaurants.

[6] World's fourth busiest airport according to Airport Council International Data

Table 5.1a: Employment by Sector 2002

	Agriculture & fishing	Energy & water	Manufacturing	Construction	Distribution, hotels & restaurants	Transport & communications	Banking, finance & insurance, etc	Public administration, education & health	Other services
Buckinghamshire	0.2%	0.1%	12.5%	4.5%	27.3%	4.6%	23.8%	20.5%	6.6%
Surrey	0.4%	0.5%	6.8%	4.4%	25.4%	6.5%	29.1%	20.9%	5.8%
Central London	0.0%	0.3%	4.4%	1.9%	22.5%	6.8%	33.9%	20.9%	9.2%
East London	0.0%	0.2%	6.3%	3.3%	17.4%	6.3%	43.4%	18.7%	4.3%
North London	0.1%	0.2%	7.7%	4.8%	27.6%	5.8%	20.4%	27.7%	5.6%
South London	0.2%	0.1%	6.6%	5.8%	26.5%	6.1%	25.5%	23.0%	6.3%
West London	**0.0%**	**0.1%**	**8.0%**	**4.5%**	**25.9%**	**14.4%**	**21.4%**	**18.3%**	**7.3%**
Thames Valley	0.0%	1.1%	9.9%	2.7%	25.0%	8.2%	29.6%	18.8%	4.7%
London	0.1%	0.2%	6.0%	3.4%	22.7%	7.8%	32.0%	20.7%	7.0%

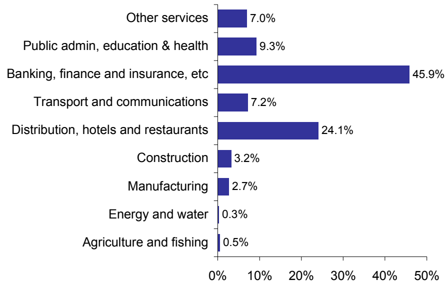
Source: Annual Business Inquiry

Table 5.1b: Employment Location Quotients for West London 2002

	Agriculture & fishing	Energy & water	Manufactu ring	Constructi on	Distributio n, hotels & restaurant s	Transport & communic ations	Banking, finance & insurance, etc	Public administra tion, education & health	Other services
Employment LQ compared with London	0.0	0.5	1.3	1.3	1.1	1.8	0.7	0.9	1.0
Employment LQ compared with Great Britain	0.0	0.1	0.6	1.0	1.1	2.4	1.1	0.7	1.4

Source: Annual Business Inquiry

Figure 5.1: Job Centre Vacancies by Sector in the West London Job Centre Plus Districts 2003



Source: Job Centre Plus

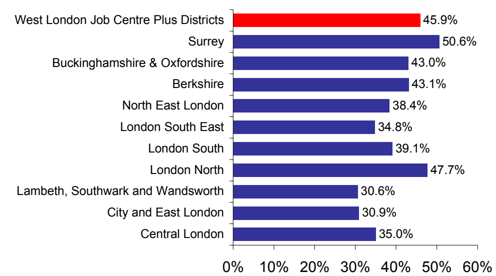
5.5 Figure 5.1 illustrates the relatively low demand for workers outside the finance and distribution sectors. For example, transport and communications employs almost 15% of the West London workforce – but vacancies within the West London Job Centre Plus districts account for just 7.2% of all vacancies. Whilst Job Centre vacancies do not account for all job vacancies, a significant proportion is advertised there. Estimates suggest that between one third and a half of all vacancies are handled by Jobcentre Plus.[7] However, it has also been commented that Jobcentres tend to be used for employers advertising lower level vacancies, and some sectors, such as construction, make very little use of them.

[7] ONS Vacancy Survey

5.6 West London performs fairly similarly to the surrounding areas in terms of the broad occupations that constitute the vacancies advertised in local Job Centres. The exception is for process, plant and machine operatives, for which the operation of transport equipment would dominate the demand for workers. During December 2003, 12.4% of all vacancies within West London were for transport drivers and operatives.

5.7 Figure 5.2 highlights that the demand for finance related employees is particularly high in West London in comparison with surrounding areas. The chart depicts job vacancies by surrounding Job Centre Plus districts. The level of vacancies is particularly high in West London, even compared with areas such as Central London, where the demand for finance workers is traditionally high.

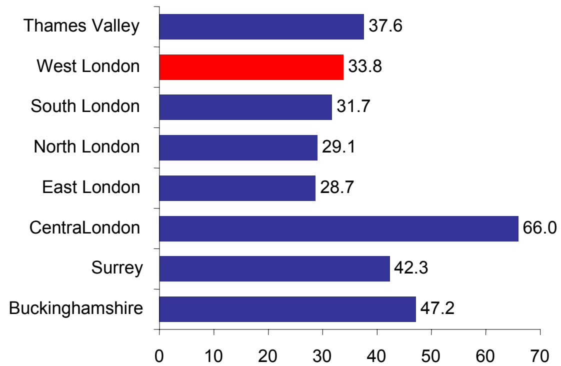
Figure 5.2: Percentage of Job Centre Vacancies within Finance, Banking and Insurance, 2003



Source: Job Centre Plus

5.8 West London has a relatively high business density compared with neighbouring areas in the London region. Only Central London has a higher business density than West London.

Figure 5.3: VAT registered businesses per 1,000 inhabitants 2002

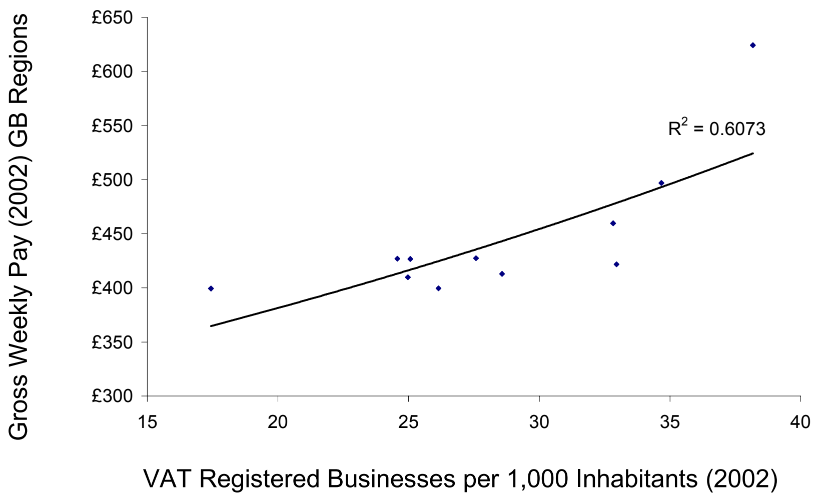


Source: NOMIS

5.9 High levels of business density are generally associated with high levels of economic competitiveness, earnings and economic output. Fundamentally, the more businesses there are within an area the greater the level of competition, causing an increase in economic competitiveness.

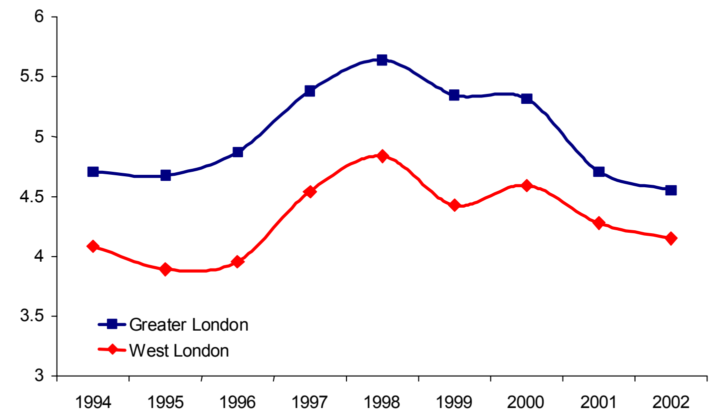
5.10 Figure 5.4 highlights the association between business density and earnings for the regions of Great Britain. This is an intuitive link – the more businesses within an area the greater the demand for labour, and the greater the demand for labour the higher its price.

Figure 5.4 Relationship between business density and earnings



Source: Annual Business Inquiry; ONS Mid Year Population Estimates; New Earnings Survey, Robert Huggins Associates

Figure 5.5 VAT Registered Business Registrations per 1,000 Inhabitants



Source: NOMIS

5.11 Business start-up rates in West London lag the regional average by some way. Figure 5.5 illustrates the differential in business start-up rates (measured as the number of VAT registered business registrations per 1,000 inhabitants) between West London and Greater London.

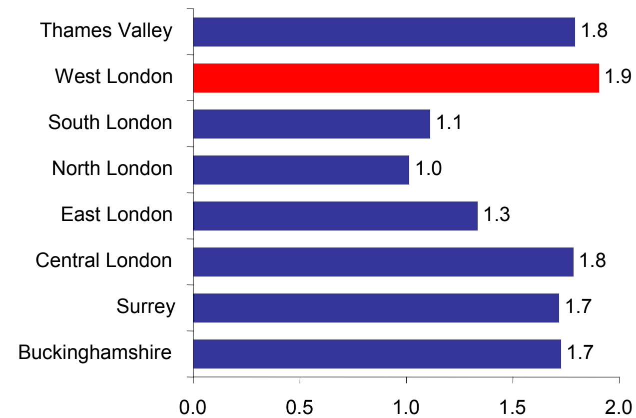
5.12 This large differential has been a constant throughout much of the late 1990s. Whilst the gap has diminished slightly in recent years, much of this can be attributed to falling registration rates across London as a whole rather than a rise in registrations in West London.

Figure 5.6: VAT registered Finance businesses per 1,000 inhabitants 2002

Source: NOMIS

5.13 West London's business density for finance related businesses is lower than a number of nearby areas. All of the areas bordering West London, with the exception of London North, have a greater level of business density within the finance sector.

Figure 5.7: VAT registered Transport and Communication businesses per 1,000 inhabitants 2002



Source: NOMIS

5.14 As we would expect, there is a relatively high proportion of transport and communication businesses within West London. This, along with the number of vacancies within the sector, indicates the importance of transport and communications to the sub-region.

5.15 Businesses within West London are, on average, smaller than their fellow London and British counterparts. Over 87% of businesses within West London employ 10 people or less. This is broadly similar (if slightly higher) than the London figure of 86.3%, and significantly higher than the GB figure of just over 83%. The large proportion of small businesses within West London can be partly attributed to the large number of small retail and personal services businesses that operate within West London, a characteristic that is common amongst many urban areas.

Table 5.2: Percentage of businesses by employee size-band 2002

	1-10	11-49	50-199	200+
West London	87.1%	9.7%	2.6%	0.7%
London	86.3%	10.4%	2.7%	0.7%
Great Britain	83.1%	13.1%	3.1%%	0.7%

Source: Annual Business Inquiry

5.16 Ensuring that some of these micro businesses within West London grow, as well as developing routes for new businesses to emerge, is an integral element of developing the West London economy. However, as illustrated in table 5.3 below, 40% of businesses within West London have not sought any advice in order to develop their business in the past three years. These businesses should be made more aware of the business services available to them. Business Link for London in particular was only used by 9% of businesses within West London between the years 2000 and 2003. Businesses should be signposted to the correct organisation in order to meet their requirements.

Table 5.3: Sources of business advice used in the past three years 2003 (%)

	London	West London
Accountants	43	45
Banks	34	37
Trade Associations	9	9
Business Link for London	8	9
Business Consultancies	7	8
Local Authority	5	4
Central Government Departments	4	4
Chamber of Commerce	4	3
Other	2	2
None of these	43	40

Source: London Annual Business Survey 2003

5.17 A number of business support services are available in West London. The list below highlights some of the organisations that offer support services within the sub-region.

- Brent Business Venture
- Business Enterprise Centre, Hammersmith & Fulham
- Business Link for London
- Gateway Enterprise
- Harrow in Business
- Park Royal Partnership Ltd
- Regenasis
- Southall Regeneration Partnership
- West London Business
- Winning in Business

5.18 Despite the wealth of support services available, provision of more specialist business support advice is also required within West London. Currently the support offered to businesses within West London tends to be quite generic, and does not cater specifically for high-technology, knowledge-based businesses. High-technology based business growth is also being restricted by a lack of business incubation facilities that are required to enable such businesses to flourish.

5.19 West London Business is the main point of contact in West London for international companies considering re-location or expansion and for growing SMEs to find new premises. Last year WLB received over 650 property enquiries, and assisted 60 businesses to either re-locate or stay in the area, creating or safeguarding 800 jobs.

5.20 Historically, inward investment has been under-resourced within the sub-region. However, this issue is currently being addressed and has improved in the last year or two via increased resources dedicated to inward investment will that allow West London Business to adopt a more pro-active, rather than purely reactive, approach towards attracting inward investment.

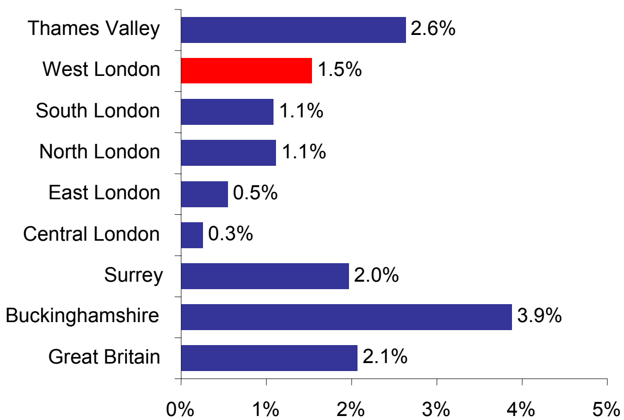
5.21 Whilst many have suggested that geography is no longer important in business – as a result of technological change in products such as digital communication – we find that workers will still want to work in places that are desirable living areas.

5.22 The environment and quality of life is an area that is becoming an increasingly important determinant within companies' investment decisions. Generally, the better the environment and quality of life, the more likely it is that a company will invest in an area. Groundwork West London has highlighted that congestion and the quality of the environment are key factors affecting and influencing businesses looking to locate in West London.

5.23 It has been argued by the GLA that parks and open spaces contribute substantially to London's marketing image and may have an important role in encouraging inward investment. Green space is also believed to contribute significantly to the local economy by attracting new retail units and generating additional customers for local shops.

High Technology Businesses and the Knowledge Economy

Figure 5.8: Proportion of Total Employment in High-Tech Manufacturing 2002



Source: Annual Business Inquiry

5.24 Just 1.5% of employment in West London is within the high-technology manufacturing sectors.[8] This represents a divide with the neighbouring areas of the Thames Valley, Berkshire and Surrey, all of which have significantly higher levels of employment within these sectors.

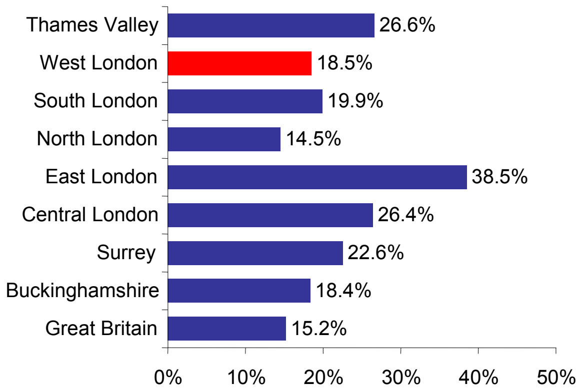
5.25 On the other hand, West London has higher levels of high-technology manufacturing employment than the other sub-regions of London.

5.26 The question this raises is whether the economy of West London is more economically linked with other parts of London or parts of the South East region. The issue is undoubtedly more complex than this, and in many respects a business competitiveness strategy for West London should not be one that becomes either increasingly west or east facing in terms of its economic development outlook. The opportunity for West London is to act as the economic and business bridge predominately between Central London and the wider Thames Valley area.

[8] High technology manufacturing sectors are based around the following SIC codes: 2214, 223, 244, 300, 311, 312, 314, 316, 321, 322, 323, 331, 332, 334, 335, 353

5.27 Employment within high-technology services is lower in West London than in most of the surrounding areas.[9] Although West London has a proportion of employment within high-technology services that exceeds the national average, given the proliferation of high-technology service sector employment in neighbouring areas, we would expect this figure to be higher.

Figure 5.9: Proportion of Total Employment in High-Tech Services 2002



Source: Annual Business Inquiry

5.28 West London does, however, possess a number of strengths within the high-tech service sectors. These include a relatively high proportion of employment within the digital media sector. However, if we compare West London with the Thames Valley we find that there is a considerable differential in the IT and communications sector (which includes software development) – a substantial differential given that these two areas neighbour each other. Similarly we find that West London is under-represented in comparison with a number of its neighbours in the business and management consultancy sector. Only North London has a lower proportion of its employment within this sector. This is another sector that we may expect to be more prevalent with West London given its location in the heart of the UK's knowledge economy.

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[9] High technology service sectors are based around the following SIC codes: 642, 651, 652, 660, 671, 672, 721, 722, 723, 724, 725, 726, 731, 732, 741, 742, 743, 744, 745, 921, 922

Table 5.4: Employment (as a proportion of total employment) in selected service sectors 2002

Area	Business/management consultancy	Digital Media	IT and Communication
Buckinghamshire	2.6%	5.5%	5.3%
Surrey	1.6%	6.0%	5.9%
Central London	2.4%	6.0%	4.0%
East London	1.3%	4.0%	4.1%
North London	0.8%	3.3%	3.0%
South London	1.7%	4.5%	4.3%
West London	1.2%	7.6%	4.4%
Thames Valley	1.4%	11.8%	12.5%

Source: Annual Business Inquiry

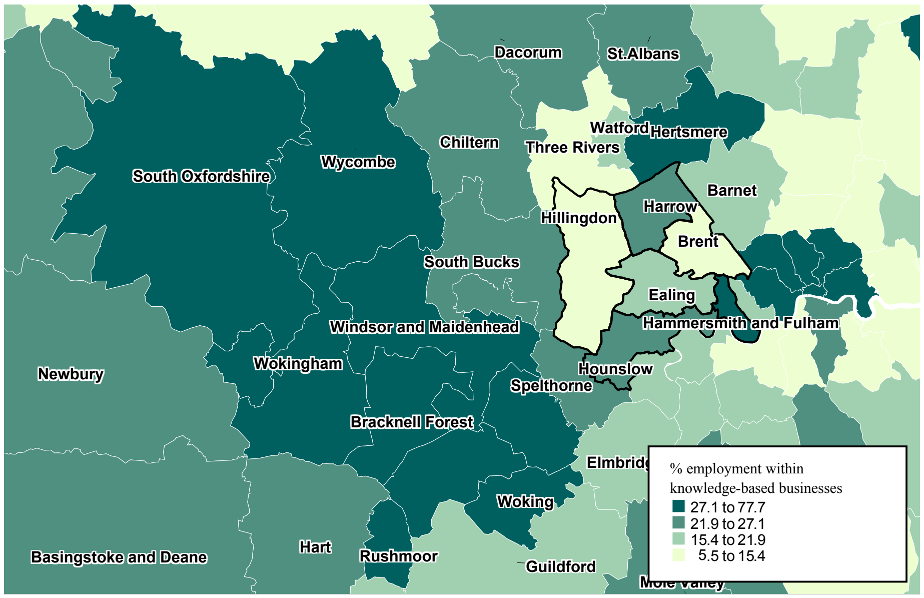
5.29 Increasing levels of employment within key high-technology service sectors will be the crucial factor in developing West London's role as a high added-value business bridge between the areas lying to its east and west.

5.30 Figure 5.10 illustrates the density of employment within knowledge-based sectors. At present, we can see that rather than acting as a bridge between the knowledge economies of Central London and the wider Thames Valley area, its role is more akin to that of a partition, since its overall levels of knowledge-based employment are lower than both its counterparts.

5.31 This all suggests that there is a lack of economic interaction between West London and its surrounding localities. In particular, given their locations next to the knowledge hotspots of Westminster and the Thames Valley, the localities of Hillingdon and Brent have significantly low levels of knowledge-based employment.

5.32 Modern economic growth theory points to the importance of spillovers as key generators of wealth. Also, spillover creation is not a zero-sum game – all areas can benefit at the expense of none. If West London can generate wealth as a result of geographic spillovers then we would expect to see a significant increase in knowledge-based activities.

Figure 5.10: Employment within Knowledge-Based Businesses[10] 2002

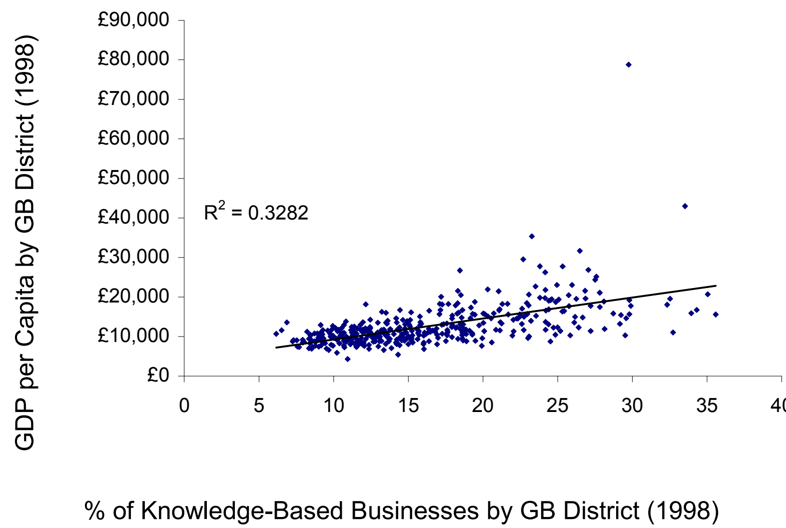


Source: Annual Business Inquiry; Robert Huggins Associates

[10] Knowledge-Based Businesses are based around the following SIC codes: 2214, 223, 244, 300, 311, 312 , 314, 316, 321, 322, 323, 331, 332, 334, 335, 353, 642, 651, 652, 660, 671, 672, 721, 722, 723, 724, 725, 726, 731, 732, 741, 742, 743, 744, 745, 921, 922

5.33 There is a significant correlation between the proportion of knowledge-based businesses and the levels of economic output across localities in the UK. Although knowledge-based activities do not account for all the variation in economic performance between localities in the UK, they do account for a large proportion of such variation, although price differentials (in terms of economic output) also have a bearing.

Figure 5.11: Relationship between proportion of knowledge-based businesses and economic output

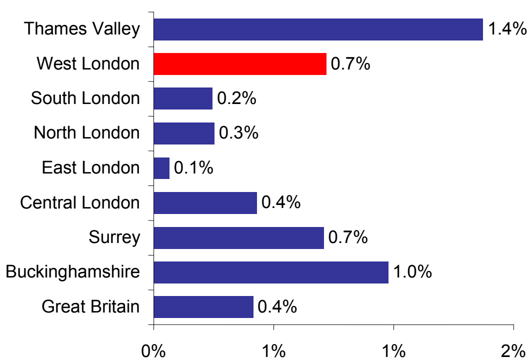


Source: Annual Business Inquiry; Robert Huggins Associates

The Innovation Economy - Research and Development

5.34 Within West London 0.7% of the workforce are employed within research and development – this compares with a national average of 0.4%. Research and development is not only a high value-added sector within its own right, but also indicates the presence of other knowledge-based businesses within the area. The Thames Valley sub-region has a relatively high density of research and development employment.

Figure 5.12: Employment in Research and Development as a proportion of total employment 2002



Source: Annual Business Inquiry

5.35 West London has a significant opportunity to grow employment within the R & D sector, particularly if there is increased linkage and interaction with the high-technology driven Thames Valley area and the concentration of research universities within Central London.

5.36 Foreign direct investment attraction in West London has traditionally focused on administrative headquarters functions, as opposed to higher value-added R & D functions. This is a UK-wide issue, in that many multinationals are happy to place their headquarters in the UK, but look for other sites elsewhere in Europe when locating their R & D facilities. However, West London should develop aftercare and business expansion programmes that will encourage existing investors to consider creating R & D functions within the area.

5.37 WestFocus is a partnership of Higher Education Institutions in the West London and Thames Valley area. The geographical focus of the partnership is flexible and also includes areas of south West London. A recent study undertaken by WestFocus highlights that the innovative performance of the area is not being fully realised – and this is inhibiting the growth potential of the wider London and South East regions.

5.38 WestFocus identifies a number of gaps in innovation and knowledge transfer within the region that are restricting the commercialisation of technology and knowledge. These gaps include:

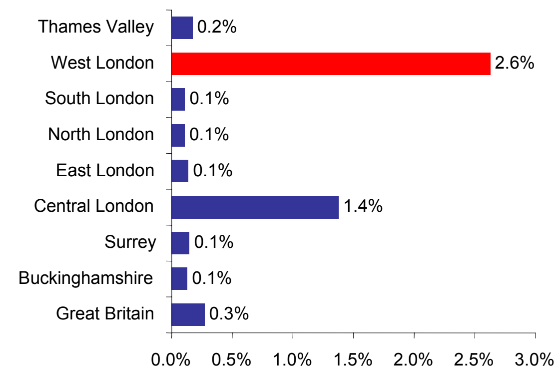
- a lack of quality incubation space for SME development – including a lack of appropriate space and associated services for inward investment
- underdeveloped intermediary support structures between HEIs, research institutions and business sectors
- weak business support structures in the areas of: information and business support, business planning, design, finance, manufacturing and service development, quality, marketing and human resources
- a lack of emphasis on skilled workers and little provision available for training in ways that is appropriate to industry sector needs
- lack of specific skills relating to ICT and technical occupations, and also in managerial positions and administrators
- shortage of seed funding.

Source: WestFocus Strategic Framework and Business Plan

The Creative Industries

5.39 The creative industries are an important element of West London's economy. A strong presence in the TV and radio sector is centred on the BBC studios in White City. Film studio facilities in Ealing also embody West London's presence in the creative industries sector. However, it is not just these large visible examples that constitute the creative industries sector in West London – the sector is also heavily reliant upon small businesses and freelance workers.

Figure 5.13: Proportion of Total Employment in TV and Radio 2002



Source: Annual Business Inquiry

5.40 An important factor in the decision of small businesses and freelance workers within the TV and radio sector to locate in West London is the quality of life on offer within the area, and also the importance of clustering within the sector.

5.41 Digital TV and radio are expanding the scope of the industry, and are offering new methods of generating revenues. Overall, growth in the global market is expected to outstrip UK growth, as the market for TV and radio in lower income countries expands. There is a significant opportunity for West London, as a cornerstone of the international TV and radio industry, to take hold of the new prospects that are opening within the industry as a result of recent technological advancements. Also, it is precisely these sectors that can develop the business bridge between Central London and Thames Valley. In essence, it is the applications side of the creative industries that provides the platforms for the technologies being developed in Thames Valley and the content within Central London.

Tourism

5.42 The tourism industry is an important element of West London's economy and one with significant potential. West London is home to the UK's premier international gateway, Heathrow Airport, and the high profile exhibition venues of Earls Court and Olympia Group. The new Wembley Stadium is under construction and the sub-region is also home to Brentford football club, the London Wasps rugby club, and the Queens Club, venue of the traditional pre-Wimbledon tennis tournament. Riverside Studios, the Carling Apollo, and the Shepherd's Bush Empire form the foundation of a strong creative entertainment sector, while the sub-region's rich cultural diversity has resulted in places, such as Southall and the Shri Swaminaryan Temple in Neasden, visited for their strong cultural identity and vibrancy. High-quality heritage attractions, such as Syon House, Osterley Park, Chiswick House and the Gunnersbury Park Estate, combine with major festivals, including the Ealing 'Mela', contributing to West London's unique tourism offer.

5.43 A well-planned and managed tourism sector can also provide exceptional 'quality of life' benefits through the varied range of visitor attractions and leisure facilities that local communities can also enjoy. The industry enables the celebration of cultural diversity, and can be an important catalyst for regeneration.

Health and Social Care

5.44 The health and social work sector is an important employer within West London; over 52,000 are employed within the sector in the sub-region according to the latest Annual Business Inquiry figures published for 2002. Proportionately less people work in the sector within West London in comparison with the national and regional averages – 7.7% compared with 8.6% for London and 10.9% for Great Britain. More importantly the recent announcement by Gordon Brown that the Government will continue to increase spending on the NHS across the country by an amount greater than the level of inflation is likely to result in an increase in employment in the sector within West London. In the recent Government Spending Review for 2004 Gordon Brown outlined the Treasury's plans by quoting:

'I can report that, with debt low, Britain can continue with historically high and rising investments in hospitals, schools and our public services - so combining the longest period of sustained economic growth for a generation with the longest sustained investment in public services for a generation.'

Gordon Brown – 2004 Spending Review

5.45 The longer-term view is that growth within the health sector (both publicly and privately provided healthcare) is likely to continue for some time across Europe as a result of the aging population. Richard Scase of Kent University recently suggested that health budgets across Europe would need to rise by 12% over the forthcoming decade in order to keep up with demographic change.[11]

5.46 In addition, there are a number of voluntary organisations, which provide health-related and other services to people in West London. Some 6.6 million people benefited from the work of the West London voluntary sector in 2001, of these almost 40% accessed health or illness-related services.

5.47 Alongside employment within the provision of healthcare the production of pharmaceuticals is also a key employer within West London. Global companies such as GlaxoSmithKline (who have headquarters within West London) epitomise the importance of the sector in the sub-region. The sector is one that is expected to grow in forthcoming years as demand for pharmaceuticals rises. Ensuring that West London compounds its global position is crucial to the development of the West London knowledge economy.

5.48 The health sector also contributes significantly to West London's innovation economy. For example, 22% of England's health R & D levy is spent within North West London. It is also worth noting the significant

[11] Public opinion: Real problem of the public sector, The Times, 27 June 2004.

linkage and interdependence between Imperial College and the pharmaceuticals industry.

5.49 It is also important that West London also utilises the benefits that can be gained from the use of Section 106 agreements. Most notably large scale public sector construction projects can be used to gain training and employment opportunities for local residents within the construction industry. Opportunities arising from construction projects within the health sector are numerous and will provide a further avenue for growth within the construction sector.

5.50 A number of significant developments emerging from the NHS in West London are likely to create significant employment opportunities. The Paddington Health Campus is due to begin construction around the beginning of 2006. The £800m is expected to take at least five years to complete, and will provide significant employment opportunities for local residents. Other schemes spearheaded by the NHS in West London include a £300m Hillingdon Hospital rebuild and a similarly large rebuild of Northwick Park Hospital.

5.51 The Brent, Harrow and Hillingdon Local Improvement Finance Trust describes the LIFT scheme as:

‘a government initiative, it is a joint venture between the Department of Health, the local health and social care services and the private sector to make this idea a reality. The result will be increased investment in primary, community and social care facilities.’

5.52 It would be expected that the LIFT scheme across West London would provide a number of smaller projects that, when aggregated, would result in a boost for local employment and skills within the construction sector. Within the Brent, Harrow and Hillingdon areas a number of schemes are underway that are likely to impact upon the local economy, such as:

- Monks Park
- Northwood Primary Care Trust
- Alexandra Avenue
- Sudbury Primary Care Centre
- Kingsbury Primary Care Centre.

5.53 Ensuring, via the use of Section 106 agreements, that West London has the trained workforce to take advantage of the opportunities from the development of the health sector will enable the minimisation of ‘leakage’ from the economy that can arise when workers are recruited from outside the sub-region. Training put in place by Section 106 agreements for construction workers will also enable construction workers to move up the value-added chain.

Transport

5.54 The transport and communications sector is an obvious area of strength for West London. The development of Terminal 5 at Heathrow would have a significant impact upon the economy and environment of West London. The area is already heavily reliant upon the airline industry. Over 1 in every 20 employees within the sub-region is employed within the scheduled air transport sector. Much employment is also reliant upon this sector, including other transport sectors and cargo, storage and warehousing. Table 5.5 below highlights employment within selected transport sectors.

Table 5.5: Employment (as a proportion of total employment) in selected transport sectors 2002

Industry	West London	London	Great Britain
Transport via railways	0.1%	0.3%	0.2%
Other scheduled passenger land transport	1.1%	1.0%	0.5%
Taxi operation	0.2%	0.1%	0.1%
Other passenger land transport	0.1%	0.1%	0.1%
Freight transport by road	0.7%	0.4%	1.0%
Scheduled air transport	5.6%	1.0%	0.3%
Non-scheduled air transport	0.1%	0.0%	0.1%
Cargo handling	0.2%	0.0%	0.0%
Storage and warehousing	0.5%	0.2%	0.4%
Other supporting air transport activities	1.1%	0.2%	0.1%

Source: Annual Business Inquiry

Employment Growth

5.55 West London's employment growth in recent years has been highest in distribution, transport and communications, and banking and finance. This growth has, however, been mirrored by the areas surrounding West London.

5.56 West London experienced annual growth of almost 3% in the transport and communications sector between 1994 and 2003. Other areas of substantial growth include the distribution, banking and finance sectors and the public sector. Employment fell within the manufacturing sector and surprisingly within the construction sector, possibly due to growth in management contracting and greater use of offsite fabrication. Despite the recent falls in employment in the construction industry, the number of jobs in this sector is expected to increase in the short- to medium-term as a result of some of Europe's largest construction projects such as the new Wembley development and Heathrow Terminal 5.

5.57 Heathrow currently has 58 million passengers per year and this will increase by 30 million. For the UK economy, it is essential that Heathrow is successful as it contributes £10 billion a year to the UK and this would be affected without a first class airport provision. There are opportunities for West London in terms of spend by 30 million extra passengers to boost supply chain work in food and drink sectors and hospitality. The airport presently employs around 68,000 people and Terminal 5 will protect or create 16,500 jobs as well as providing an additional 6,000 construction jobs. Tourism in the UK is worth £10 billion a year and depends on Heathrow as the country's principal gateway. Terminal 5 is essential if the airport is to remain the cornerstone of tourism in the UK.

5.58 An analysis of growth that looks at employment by sector between the years 1982 and 2003 paints a similar picture to recent growth trends, with business and financial services dominating the growth of employment. However, as can be seen in table 5.7 below, there has been a decline in employment in the public sector between 1998 and 2002 in West London. The transport and communications sector has also seen a decline in employment over this time period for the sub-region.

5.59 Those sub-sectors that have recently experienced the highest growth in West London include air transport, hotels and restaurants as well as real estate activities. It is important to note that the effects of September 11th dampened growth within the transport, hotels and restaurants sectors and recovery in the tourism sectors will result in even greater growth in employment within these sectors.

5.60 Growth in real estate activities, whilst substantial, mirrored the UK growth rate and is more likely to have been the result of continued house price inflation as opposed to any West London specific characteristics and a cooling down of the housing market will be expected to lead to a similar result in employment within the sector.

Table 5.6: Employment Growth (Compound Annual Growth Rate) 1994-2003

	Bucks	Surrey	Central London	East London	North London	South London	West London	Thames Valley
Manufacturing	-3.9%	-2.2%	2.3%	-1.9%	-1.8%	-1.1%	-0.2%	-2.6%
Construction	3.9%	1.3%	3.1%	3.9%	-0.9%	2.8%	-0.9%	2.1%
Distribution	3.2%	0.1%	1.8%	1.2%	1.4%	1.6%	2.1%	1.2%
Transport & Communications	1.5%	-0.9%	-0.1%	1.2%	2.8%	2.1%	2.7%	4.5%
Banking & Finance	4.2%	2.8%	5.0%	2.1%	2.6%	2.5%	2.8%	1.9%
Public Administration	0.6%	2.0%	1.5%	2.2%	2.8%	1.8%	1.6%	3.6%
Other Services	2.8%	1.4%	2.0%	3.8%	1.1%	3.0%	2.0%	2.4%

Source: Labour Force Survey

Table 5.7: Long – Term Employment Growth (Compound Annual Growth Rate) 1982-2002

	CAGR (%) London 1982-2002	CAGR (%) West London 1982-2002		CAGR (%) London 1982-2002	CAGR (%) West London 1982-2002
Agriculture, Forestry & Fishing	-2.9%	2.0%	Rubber & Plastics	-3.2%	-3.6%
Oil & Gas Extraction	3.4%	-3.8%	Other manufacturing	-3.7%	-3.6%
Other Mining	-16.7%	-18.2%	Construction	-1.8%	-1.0%
Gas, Electricity & Water	-4.9%	-6.9%	Retailing	0.9%	1.0%
Fuel Refining	-21.0%	-14.5%	Wholesaling	0.3%	-0.5%
Chemicals	-3.7%	-4.5%	Hotels & Catering	2.8%	2.5%
Minerals	-2.0%	-4.2%	Transport	1.5%	-0.3%
Metals	-7.0%	-7.3%	Communications	-0.4%	-2.0%
Machinery & Equipment	-7.1%	-6.6%	Banking & Insurance	-0.5%	1.0%
Electrical & Optical equipment	-6.5%	-6.5%	Business Services	5.3%	4.1%
Transport Equipment	-4.8%	-3.8%	Other Financial & Business Services	1.9%	3.2%
Food, Drink & Tobacco	-3.1%	-4.0%	Public Admin. & Defence	-0.9%	-1.2%
Textiles & Clothing	-6.9%	-6.0%	Education & Health	-0.5%	-0.4%
Wood & Wood Products	-3.0%	-3.1%	Health	0.7%	0.5%
Paper, Printing & Publishing	1.1%	-0.7%	Other Services	3.8%	3.6%

Source: Greater London Authority

5.3 Key Issues

5.61 A key constraint to business growth in West London may be a lack of economic connectivity with neighbouring areas such as Central London and the Thames Valley. It has its obvious strength in the transport and communications sectors, but also needs to develop more tradable specialisms in the knowledge-based sectors. The creative industries sector is perhaps the best example of such an activity within which West London can excel and create opportunities across sectors and geographies.

5.62 Other constraints, highlighted within the analysis so far, on the development of the West London economy include recruitment problems within the finance, business and insurance sectors, problems in recruiting transport operators, a lack of knowledge-based businesses and a lack of interaction between West London and the Thames Valley, Surrey and Buckinghamshire areas.

5.63 It is important that the recruitment problems that exist in West London, particularly any transport, tourism and creative industry related occupations (given the importance of the sector within West London) are addressed quickly.

5.64 In order to develop the West London economy, the sub-region should also seek to integrate itself more with its surrounding sub-regional economies. Whilst the Thames Valley, Surrey, Buckinghamshire and Central London have a large density of knowledge-based employment, the same cannot be said of West London – which is wedged between all the aforementioned sub-regions. Significant opportunities exist in West London to 'bridge' these areas and increase the sub-region's endowment of knowledge-economy employment. Indeed, the closeness of Hammersmith & Fulham within West London with areas of Central London, both geographically, economically and in terms of sector mix, suggests that the area may be a sensible focus point to develop links between West London and Central London.

5.65 An example worth looking at here is the economic interaction that has developed across the wider Bay Area of San Francisco, which has a spatial dynamic that is not unlike that encountered by West London. First, there is the city of San Francisco itself, which is the financial administrative centre of the Bay Area (not unlike Central London); second, there is the southern Silicon Valley strip (similar to the Thames Valley/M4 Corridor), and third, there is the rest of the Bay Area which provides the linkage between the city and Silicon Valley. In this case, it is a very real linkage with a high density of value-added economic activity that provides the support for both the city and the Valley. There is much here than West London can learn from.

5.66 Further constraints include skills shortages within the construction industry which have been described as chronic by the London Development Agency. There are a considerable number of construction projects planned for West London, and a failure to resolve the skills problem within the sector may result in a contraction of any possible employment growth within the sector. Given the nature of construction demand, a strategic approach needs also to take account of the underlying capacity of the local labour market to supply the industry in West London, given competition with other sectors.

5.67 Around 80% of those entering the workforce in the foreseeable future within West London will be ethnic minorities. Appropriately designed recruitment and employment policies which value the diversity of London's communities will create a more motivated, skilled and productive workforce.

5.68 A further consideration is the scale and scope of business support activities in West London. Business support has been described as fragmented and confusing and reliant on public funding. Whilst the overall business support infrastructure is adequate for the needs of new and growing business, there is a particular lack of specialist support for the higher value-added, knowledge-based businesses. The current review by the LDA of business support in London provides an opportunity to improve the integration and cohesion of services to businesses within the sub-region in terms of the prioritising the support infrastructure and driving up quality.

5.69 It is worth noting that much work is currently been undertaken on business competitiveness within the SBS City Growth Strategy scheme. Heathrow City and Park Royal have been designated as pilot City Growth Strategy areas within West London.

5.70 West London boasts a number of attractions for businesses. The proximity of Central London, as well as its proximity to the Thames Valley, other high-performing South East England sub-regions and Heathrow Airport means that West London is within the centre of the UK's most competitive regions.

5.71 Significant opportunities exist for West London's businesses if they can make full use of the resources open to them. Initiatives such as HEI commercialisation programmes (especially with the success of Brunel University's commercial activities) and the development of further links with knowledge institutions would significantly aid economic development within the area.

5.72 The creative industries are one area of activity where West London has a current competitive advantage and also particular opportunities for the future. The advancements made in digital media mean that there are many more outlets for creative energies – and the current density of creative sectors that exist in West London suggest that the sub-region is an ideal area to locate such businesses. It is also an area where activities are currently taking place. Hammersmith & Fulham for example have received funding from the LDA to develop their local media sector.

5.73 The tourism sector is also an industry of opportunity for West London. Key trends in the tourism market spell significant opportunities for West London. Discretionary income is increasing and people therefore have more money to spend on leisure. People will be increasingly concerned about leading a healthy lifestyle, and there will be increasing demand for activities and sports related breaks. Leisure time, however, is decreasing, fuelling the desire for high-quality products and experiences that enable relaxation. The Meetings, Incentives, Conferences and Exhibitions (MICE) market is growing and centres of business such as Heathrow, Park Royal, White City, and Chiswick Park create locations of need for business tourism. Other developments such as Heathrow Terminal 5, the regeneration and development of the Wembley area, and London's 2012 Olympic bid will also have an impact on West London.

5.74 There are a number of geographic concentrations of particular populations in specific locations, for example people from the Asian sub-continent in Southall, which have given some neighbourhoods a distinctive quality. There are opportunities here, not only for local residents, but also neighbouring communities. Concentrations of restaurants, ethnic markets or entertainment for young people may form a critical mass which has the potential to be developed further. Media, cultural industries, tourism and the night-time economy are examples.

5.75 There is a visible concentration of activity in terms of BME entrepreneurship in West London. A particularly successful example is food processing and distribution. Links to home economies for particular ethnic groups will be a great advantage for developing other areas – opportunities that build on family connections and a shared language. Marketable cultural products will be attractive both for overseas and local markets. Gateway Asia is a key flagship initiative, developed by SRP, to assist companies to increase sales and profitability by developing active trading links with South East Asia.

5.76 Recognition that the 200 plus languages spoken in West London is an enviable resource will serve to enhance business ambitions and overseas trade in all sectors. Expansion and promotion of sustainable tourism activities, for example, is an area that, if supported could be a major growth area.

5.77 It is imperative that whilst the above factors should be addressed in order to maximise business competitiveness within London we realise that there are huge links between the business competitiveness and other elements of the West London Economic Development Strategy. Indeed, increasing business competitiveness is as reliant on addressing factors such as skills, land and property and infrastructure as it is on business support schemes. The benefits of local employment need to be sold to both employers and residents and their belief in the concept developed.

5.78 Incentives to employ local labour will also reduce recruitment, relocation and retention costs, travel to work in terms of time and money and the negative impact on the environment of travelling by car.

5.4 Objectives and Rationale

Objectives	Rationale
1. Improve private, public and community and voluntary sector interaction and connectivity between West London and the localities lying to its east and west.	Whilst the Thames Valley and Central London are two of the most prosperous areas in the UK, West London does not fare quite so well. Given its location and transport links, West London has a massive opportunity to capitalise upon the opportunities on offer as a result of its location by increasing interaction and acting as a 'bridge' between Central London and the Thames Valley.
2. Develop a coordinated and more integrated support service for businesses and the voluntary and community sector that caters for the wide range of business activities undertaken in West London. Additional business support services should be aimed at emerging and high value-added businesses.	There is little evidence that current business support mechanisms are creating the level of business growth required in West London, particularly for high value-added businesses, where market failures are often more difficult to address.
3. Provide a world-class and targeted inward investment and aftercare service.	Over recent years an increasing amount of foreign investment in the UK has come from expansions by existing investors rather than from new investors. West London should also focus on seeking to ensure that investment projects have as high an R & D element as possible.

4. Further develop links between private, public and the community and voluntary sector and academia at all levels (ranging from school to university education) through the activities of WestFocus, for example.	Potential benefits of industry-academia links, particularly across knowledge economy sectors, will be a vital catalyst for stimulating future economic growth.
5. Provide business support for under-represented groups, such as ethnic minority businesses.	Ensure that under-represented groups are given the opportunities to develop business ideas.
6. Develop the growth and competitiveness of key sub-sectors within knowledge-based industries. These should seek to incorporate where relevant those growth sectors already identified by the London Development Agency, but should concentrate on the creative industries, tourism and ICT, as they will provide the economic linkage highlighted by the first objective.	West London trails behind the rest of London and other counterpart areas in its level of knowledge-based business activity.
7. Ensure provision of training in business skills and foster a strong entrepreneurial culture, particularly targeted towards high growth and/or high employment sectors.	Business start-up rates in West London lag the regional average, and are not occurring in those sectors that have a high growth potential.
8. Ensure the West London economy benefits to the full from its cultural and ethnic diversity, harnessing the growth potential of minority ethnic community owned businesses through targeted support and development.	There advantages to be gained from exploring supply chains to support local and BME businesses, in terms of strengthening local economies and in particular international links. Gateway Asia is an example of an initiative aimed towards assisting companies to increase sales and profitability by developing active trading links with South East Asia.

Land and Property

6 Land and Property

6.1 Background

6.1 The potential for the West London economy to grow will depend mostly on the competitiveness and productivity of businesses. A critical issue will be the capacity and ability of the sub-region to accommodate population and economic development in physical terms.

6.2 The West London Economic Development Strategy will need to take into account the spatial policies set out within the London Plan, which will be implemented in the sub-region through the Sub-Regional Development Framework.

6.3 All businesses need appropriate premises for their operation – whether a small office or a major development site. West London has to ensure a supply of appropriate sites and premises to meet projected employment growth over the next 15 years. In particular, the sub-region has to develop property that can support and encourage higher value enterprises and investment, specifically high technology and growing clusters, e.g. creative industries; and needs to ensure the development of strategic sites that provide major opportunities for investment and growth.

6.4 Securing a sustainable economy must also entail securing the future of West London's towns as centres of economic activity. The town centres throughout West London still play a vital role as centres for business, commerce, leisure and recreation and in knitting communities together. However, falling employment, low levels of investment and the construction of out-of-town retail and leisure facilities have taken much of the social and economic life from many town centres. Co-ordinated action will be required to promote and intensify retailing, services, employment, leisure and housing in town centres across the sub-region. Boosting the confidence and image of town centres will play a critical role in reinforcing the culture and character of communities.

6.5 West London has a clear and successful identity in the property market underpinned by London Heathrow Airport, an economic driver of national significance and a major contributor to the success of the London and South East economies.

6.6 The West London sub-region can be characterised as having a number of key employment areas.

- **Park Royal / Wembley** area is dominated by distribution and service businesses serving the West End and Central London. Park Royal is a significant employment area in West London characterised by a large concentration of industrial activity.

There is a strong demand and relatively short supply of industrial land in the area. Manufacturing of food and other businesses are concentrated there. Its property and infrastructure are ageing but has it has shown itself to be capable of regeneration through market processes. Rising values are also acting to displace lower value activities. Wembley also has an old industrial stock and is less well served by the road network.

- **Southall / Hayes / West Drayton** is a varied business location, which includes a modern high quality business park at Stockley Park and older industrial estates along the Great Western railway line between Southall and Yiewsley. The area includes the Southall British Gas site, the largest brownfield site in West London. Market-driven property investment is underway and will be significantly enhanced with improvements to rail connections. BAA's £30 million investment in the Heathrow Express will see trains stopping half-hourly at Ealing Broadway, West Ealing, Hanwell, Southall and Hayes.

- **Hounslow / Bedfont Lakes.** Within Hounslow the town centres of Hounslow, Brentford and Feltham, together with the key employment locations of the Great West Road, Chiswick Business Park and Bedfont Lakes, offer significant opportunity for new development and growth. Bedfont Lakes needs to consolidate its position as a key employment location for commercial activity within West London, which is able to compete (together with Stockley Park) as an office investment location.

- **The area around the A4 / M4 corridor** includes a significant concentration of employment activity. Along the 'Golden Mile' of the A4 is situated the national and international headquarters of companies that include GlaxoSmithKline, Carillion, BSkyB, Gillette and Data-General. It is also important for distribution and servicing of the West End and Central London. The Great West Road needs to redefine its position in the London economy to adjust to underlying long-term trends in the office property market and the limitations of future planned public transport access to the surrounding area.

- **The specialised market area of Heathrow**, the vast majority of the businesses being airport related with distribution, administration and service sectors often combined. Heathrow Airport is clearly of major importance to the London / UK economy as well as the immediate catchment area. Certain types of businesses will base their location decisions on proximity to Heathrow, particularly those with important HQ functions. Around 90% of the worldwide GDP is accessible from Heathrow (Estates Gazette January 2004).

6.7 Future development activity in West London is likely to be dominated by:

- the redevelopment of Heathrow Airport, specifically the construction of Terminal 5 and the outcome of any decision on a third runway.
- the concentration of new investment in Wembley associated with the building of the national stadium
- the continuing modernisation of Park Royal
- the development of White City.

6.8 The areas around Hayes / Heston / Southall and Park Royal Wembley have been identified as priority investment locations by the London Development Agency in recognition of economic needs and opportunities.

6.2 Strategic Context

6.9 The strategic context in terms of land and property is set out within the newly adopted London Plan. In delivering land for employment, industrial policies in the London Plan reflect the broader policy concerns and over-riding need to achieve sustainable development patterns. Critically in the context of West London and strategic sites development, there should be a closer relationship between public transport accessibility, making efficient use of land and encouraging a diversity of uses. The strategic objectives that relate to the economic development spatial element for West London are set out in Table 6.1.

Table 6.1

The London Plan (Selected) Strategic Priorities for West London: 2004
• capture the benefits of the economic generators, including Heathrow, within the sub-region for residents, whilst ensuring that this development improves not degrades the environment • realise the potential of Wembley as a national and international sports, leisure and business location • identify capacity to accommodate new job and housing opportunities and appropriate mixed-use development • promote and intensify retailing, services, employment, leisure and housing in town centres and opportunities for mixed-use development • improve the variety, quality and access to available employment sites, especially within Strategic Employment Locations, to meet the identifiable demands for employment land • ensure that new development is sustainable, safe, secure and well designed, improves the environment, and takes account of the sub-region's heritage • identify areas suitable for tall buildings.

6.10 Within the London Plan period, the forecast is for the sub-region to accommodate around 45,000 additional homes and 86,000 new jobs. Much of this growth is expected to be located in the Western Wedge, the London part of which extends from Paddington through Park Royal and Wembley to Heathrow and its environs.

6.11 The London Plan recognises that West London, in comparison to East London, has a relatively limited amount of brownfield development land and therefore much of the planned growth will need to be realised through higher density development, exploiting locations with good existing or potential access by public transport.

6.12 In terms of strategic context, a number of pan-London and sub-regional studies are currently being undertaken to assess demand and supply issues with regard to employment land. The Sub-Regional Development Framework will need to balance demand and supply issues to encourage continued economic development in a way which is compatible with environmental objectives, which may include protecting valuable industrial sites from competing uses, particularly residential.

6.13 The SRDF will set a clear framework for the development necessary for West London to fulfil its ambitions for balanced economic success as well as for social inclusion and a quality environment.

Opportunity Areas in West London

6.14 Within West London, there are a number of strategic 'areas of opportunity', which are areas of substantial concentrated economic activity with significant development potential. The scope is to ensure that these areas and specific sites realise their development potential and make a significant contribution to supporting a prosperous, dynamic, inclusive and sustainable sub-regional economy.

6.15 The West London Opportunity Areas are shown in Table 6.2, with indicative estimates for homes and jobs growth.

Table 6.2: Opportunity Areas in West London – indicative estimates of growth

Opportunity Area	Area (ha)	New jobs to 2016	New homes to 2016
Wembley	238	5,000	400
White City	30	11,000	1,200
Park Royal	470	10,000	
Heathrow, Feltham, Bedfont Lakes, Hounslow	91	5,500	930
Hayes, West Drayton, Southall, Stockley Park	371	35,000	5,800
Willesden Junction[12]	96	3,600	500

Source: The London Plan 2004

[12] Area for Intensification

Strategic Employment Locations

6.16 The London Plan also identifies a number of Strategic Employment Locations (SELs) across London. These are sub-divided to reflect the locational needs of different businesses, recognising that industries of different types will have different spatial and environmental requirements.

- Industrial Business Parks (IBPs) are for businesses requiring a high quality environment.
- Preferred Industrial Locations (PILs) are for businesses with less demanding requirements.

The SELs located within the study area are listed in Tables 5.3 and 5.4 below.

6.17 In line with PPG12, the Mayor's Supplementary Planning Guidance (SPG, September 2003) and the London Plan, there will be a clear need to ensure that West London manages and provides an adequate stock of industrial employment capacity to meet the future needs of different types of industry, including the need for good quality and affordable space. This will mean working in partnership to provide choice and flexibility to meet the requirements of different types of developer and occupier. However, there is also a requirement to ensure that the sub-region plans, monitors and manages the release of genuinely surplus industrial land so that it can better contribute to strategic and local planning objectives, with housing needs being a particular priority.

6.18 The development of the Sub-Regional Development Framework will be the mechanism to identify and justify any changes to the SELs to ensure that a balance is maintained to promote economic growth whilst utilising land assets.

Table 6.3: Preferred Industrial Locations

Borough	**Preferred Industrial Location name**
Brent, Ealing, Hammersmith & Fulham	Park Royal (part)
Brent	Wembley Stadium (part)
Brent, Barnet	Staples Corner
Ealing	Great Western Road (part)
Ealing	Northolt, Greenford, Perivale (part)
Harrow	Wealdstone Industrial Area
Hillingdon	Uxbridge Industrial Estate
Hillingdon	Stonefield Way / Victoria Road
Hillingdon	Hayes Industrial Area
Hounslow	North Feltham Trading Estate

Source: The London Plan 2004

Table 6.4: Industrial Business Parks

Borough	**Preferred Industrial Business Park name**
Brent, Ealing, Hammersmith & Fulham	Park Royal (part)
Brent	East Lane
Hammersmith & Fulham	Wood Lane (part)
Harrow	Stanmore (part)
Hillingdon	North Uxbridge Industrial Estate
Hounslow	Great Western Road (part)

Source: The London Plan 2004

6.19 The SELs are priority locations for employment use and clear planning frameworks need to be in place to manage, protect and enhance these designated strategic employment opportunities.

Town Centres

6.20 West London has strong urban centres but also vulnerable or declining secondary town centres and suburban areas. Some of these provide both the need and the opportunity for significant redevelopment. Maintaining and improving the competitive performance of town centres in West London will be an important strand of the Economic Development Strategy. Economically, town centres continue to dominate retail activity, with nearly two thirds of retail floor space located in town centres despite the growth of out-of-town formats over the last 20 years (Association of Town Centre Management (ATCM)). Socially, town centres remain the focus for the delivery of a wide range of both public and private sector services and have an important role to play in accommodating some of the projected growth in housing and employment.

6.21 The London Plan sets out the strategic context to support the development of London's town centres over the lifetime of the Plan to meet the needs and aspirations of local communities. Further work on categorisation, as well as an assessment of retail need and reconciliation with town centre capacity, will be provided through the Sub-Regional Development Framework. The classification of town centres in West London is set out below.

Table 6.5: Town Centre Classifications

Metropolitan Centres	
Borough	***Centre***
Ealing	Ealing
Harrow	Harrow
Hounslow	Hounslow
Major Centres	
Borough	***Centre***
Brent	Wembley
Brent / Camden	Kilburn
Ealing	Southall
Hammersmith & Fulham	Hammersmith
Hammersmith & Fulham	Fulham
Hillingdon	Uxbridge
Hounslow	Chiswick
District Centres	
Borough	***Centre***
Brent	Harlesden Willesden Green Wembley Park Preston Road Neasden Ealing Road
Ealing	Acton Greenford Hanwell
Hammersmith & Fulham	Shepherds Bush
Harrow	Pinner Wealdstone Rayners Lane South Harrow

	Stanmore North Harrow
Hillingdon	Yiewsley / West Drayton Ruislip Hayes Eastcote Northwood Ickenham
Hounslow	Feltham High Street Brentford

Source: The London Plan 2004

6.22 The West London Economic Development Strategy will need to enhance and strengthen the role played by town centres as a focus for employment, service and leisure functions and community and voluntary sector activity.

6.23 A comprehensive approach will be required to fully optimise development potential in these key locations, ensuring the provision of sustainable transportation links, attractive development opportunities and an appropriate range of housing. It is vital that policy is developed and implemented in such a way to strengthen the ability of town centres to compete for economic activity and investment.

6.3 Key Issues

6.24 The extent to which West London can continue to be attractive to businesses will be its ability to maximise its competitive advantage, specifically London Heathrow Airport, the transport network, the quality of the urban environment and the continued provision of attractive sites and premises.

6.25 In terms of developing a land and property programme to secure economic development objectives, it is important to understand capacity issues that currently exist within the West London sub-region. Detailed work is currently being undertaken to assess current and future capacity issues, which will inform the development of the SRDF. This may impact on the key spatial economic development objectives set out within this Strategy.

6.26 In terms of future capacity, the critical issue for West London is the extent to which current land supply will be maintained. A report on the demand and supply of business space in London (RTP Report on the Demand and Supply of Business Space in London) confirms that there is forecast to be available land to accommodate the likely growth in both office and industrial jobs up to 2016 across West London. However, it is worth noting that confidently predicting the demand and supply of land is difficult, and any forecasts should be treated with caution.

6.27 Currently, demand for residential investment property seems to be fairly healthy, however evidence suggests that in the medium term there will be some downward pressure exerted by rising interest rates on the value of both commercial and residential land.

6.28 Historically, West London has been the largest office market in outer London, when considered in aggregate and includes:

- major town centres, including Hammersmith, Chiswick, Ealing, Hounslow and Uxbridge
- office campus style business parks, including Stockley Park, Bedfont Lakes, Chiswick Park, Park Royal, Hammersmith Embankment
- arterial roads, offering very high visibility for major corporates, including the Great Western Road and Bath Road.

Each of these location types still retains substantial development capacity within the sub-region.

6.29 The decline in the office market has had a significant impact in the sub- region. In West London, Heathrow has been badly affected by falling demand, with the availability of premises surrounding the airport more than doubling.

6.30 The largest schemes outstanding in the West London area are the Hounslow town centre re-development (with an office component of 250,000 sq.ft.), the 780,000 sq.ft. at Chiswick Park and the 500,000 sq.ft. extension at Stockley Park.

6.31 There is likely to be continuous demand for space from the health sector in forthcoming years. Increases in government expenditure will lead to more construction projects within the sector for West London (such as the Paddington Health Campus scheme), whilst overall demand for health services is predicted to rise in developed nations for some time to come.

6.32 With regard to future capacity, the Western Wedge report includes a review of potential developments within West London between 2000-2021, based on a review of current UDPs and an assessment of the London Development Database. This information is included in Table 6.6 below.

6.33 Key issues that will impact on the development of the West London Economic Development Strategy in line with the London Plan will include:

- the need to ensure that key strategic sites will be coming forward as a key resource for attracting inward investment and accommodating indigenous growing firms
- the need to ensure that the right mix of opportunities come forward to meet market needs and 'cluster' opportunities specifically within higher value added sectors
- the need to balance competing land uses to meet economic, environmental and social needs
- the need to ensure that potential developments are accessible, particularly in terms of public transport provision.

6.34 A pressing challenge is to promote an appropriate mix of development opportunities. These should include distinctive residential opportunities, a hierarchy of linked employment and business sites and accommodation (including incubator units for start-up enterprises, the voluntary and community sector, BME business and facilities for inward investors), thriving town centres, an unrivalled green environment and easy access and movement throughout the sub-region. In addition, it will be critical to balance competing land uses.

6.35 In terms of land and property, an important consideration is where employment growth and future demand is likely to come from. Employment is forecast to grow in the region of 10-14% between 2001 and 2016.[13] There are significant regional variations, with Hammersmith & Fulham projected to see the largest growth (19%). In terms of sectors, there is expected to be growth in the following sectors in West London:

[13] GLA/Voltera

- higher value logistics and distribution, which will influence demand for warehousing space
- media and creative industries
- knowledge based enterprises, which are likely to require high quality sites in accessible locations
- medium tier value activities in finance and business services
- construction (until the completion of Terminal 5 and Wembley)
- leisure / hospitality sector.

Data on recent employment trends is highlighted in section 4.

Table 6.6: Potential Developments 1999-2021

BOROUGH	SITE AREA (HA)	OFFICES (M2)	INDUSTRIAL (M2)	B-SPACE FLOORSPACE (M2)	NON B-SPACE FLOORSPACE (M2)	A1;A2;A3 (M2)	D1;D2 (M2)	FINAL ALL JOBS ESTIMATED
Hillingdon	104.8	144,105	121,118	265,223	13,067	13,067		29,653
Hounslow	18	236,445	112,878	351,904	0	0	2,581	26,861
Ealing	48	102,022	85,700	214,542	330,085	10,360	319,725	14,474
Brent	46.4	160,975	136,595	319,440	66,802	49,040	17,762	21,371
H & F	16	195,532	44,725	255,992	157,555	95,660	61,895	17,420
Harrow	19.6	147,839	159,390	796,179	19,445	11,768	7,677	27,962
West London	252.7	986,918	660,406	2,203,280	586,954	179,895	409,640	137,740

Source: Western Wedge Report 2002 SDS Technical Report 14

6.36 West London has an important role in providing space for the activities that support London's position as a world city and the international hub of Heathrow. Land, sites and premises are important in attracting inward investors and supporting home-grown businesses. In West London, there are a number of headline issues, which will shape strategic objectives and priorities for the sub-region.

6.37 There is a need to promote, manage and enhance key strategic employment locations throughout the sub-region. The contraction in manufacturing, utilities or public sector may lead to sites becoming available which could be utilised to find new uses in growing sectors, though there may be transitional and market-orientated barriers.

6.38 There is a need to ensure that industrial land is protected to support a range of higher, medium and lower grade activities. Although there is an overall aim to protect and retain sites for employment use, this is now being challenged by changes to policy at the national level (PPG3 and PPG4) as a result of the demand for new housing. The issue will be to ensure that local authorities not only retain those sites in industrial use which are considered to be most important for industrial uses, but also those lower cost premises, which are critical in providing scope for low cost industrial accommodation.

6.39 Because of size, scale and location, there are a number of key strategic locations, which provide the opportunity for an integrated development agenda, which will contribute to economic growth as well as for social inclusion and a quality environment. Specific characteristics of strategic locations include:

- catalyst sites, where new investment will have a significant economic impact throughout the sub-region
- key 'gateway' locations close / adjacent to current or planned transport improvements
- sites which have the scale and scope to provide an integrated approach that realises strategic objectives in terms of jobs, homes, transportation improvements and improved quality of life
- sites that contribute to sustainability objectives.

6.40 The choice of sites will be subject to review as part of the SRDF but are likely to include:

- Park Royal
- Wembley
- White City
- Bedfont Lakes
- Hayes / West Drayton
- Hounslow Town Centre
- Southall
- Brentford and the A4/M4 corridor.

6.41 The future development of these strategic sites in West London will be an important factor in supporting competitiveness and growth prospects. They will enable local partners to focus on large-scale projects with a timeframe beyond five years.

6.42 New opportunities for commercial property development are scarce, and housing needs are placing pressure on those major sites still available, but in overall terms there is little evidence of unfulfilled demand for industrial or office property in West London.

6.43 There is evidence of unfulfilled demand for small, managed workspaces at sub-marketplace rentals to support start-ups, specifically business incubators to support growing clusters and help stimulate local enterprise. There is also unmet demand amongst community and voluntary organisations seeking relatively low cost accommodation.

6.44 There may be a requirement to specify interventions to procure development that the market and the underlying economy are less likely to produce.

6.45 Maintaining and improving the competitive performance of town centres in West London is central to the West London Economic Development Strategy. This requires town centres to attract and retain investment and to enhance their competitive position as centres for retail, business, leisure and social activity.

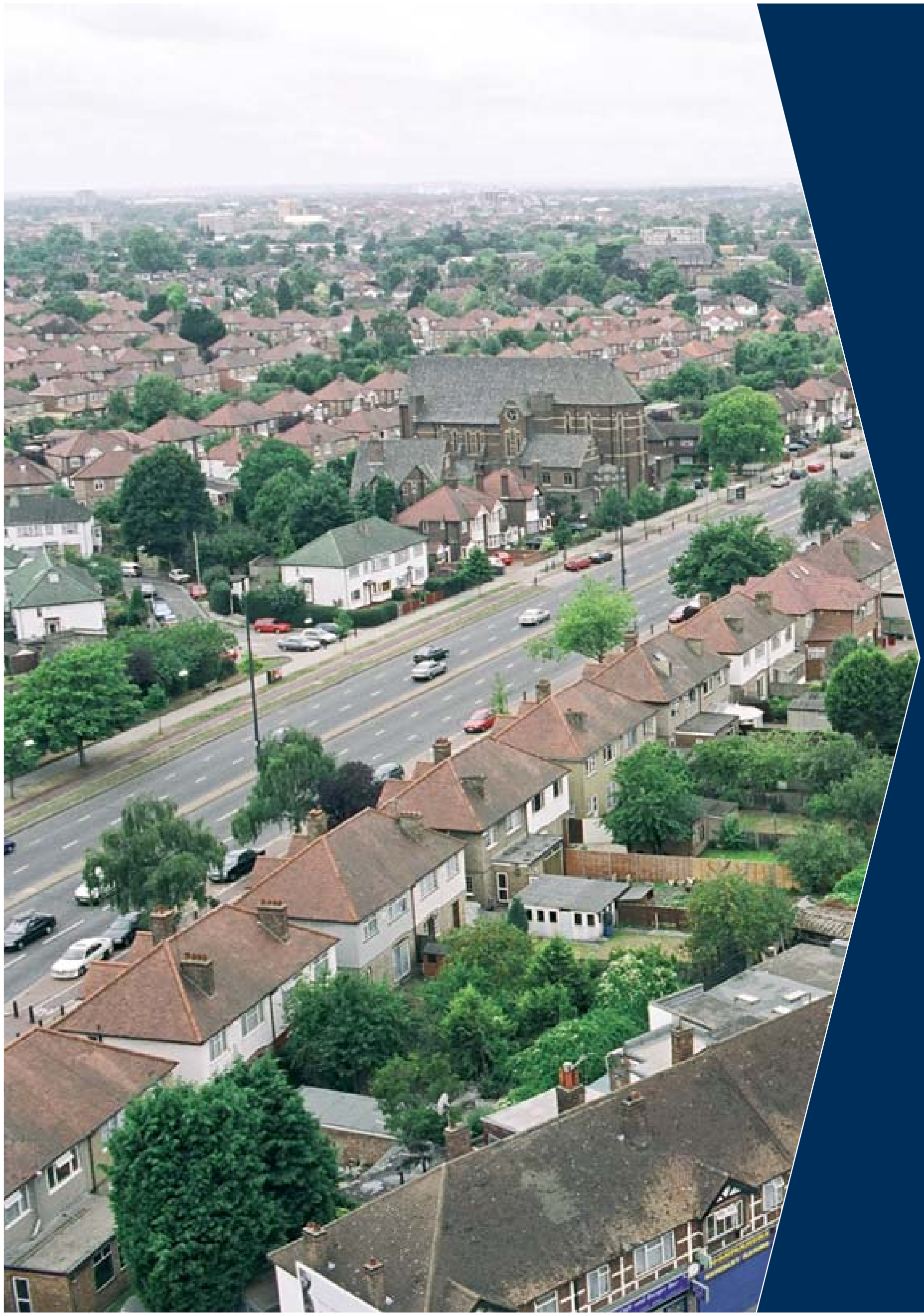
6.46 Partners in West London are committed to ensure that businesses in the sub-region are able to grow and develop in response to rapidly changing technologies and new business opportunities. There is a need to ensure that the planning system is able to provide certainty and speed of response to proposals for development.

6.4 Objectives and Rationale

6.47 The Strategic Objectives are setting the scene for actions for the next 5 to 10 years. This is very much a ‘live’ document and the objectives and programme will need to evolve over time. The Strategic Objectives are, at this stage, indicative and will need to be refined in line with the evolving spatial plan and priorities that are being developed for the sub-region.

Objectives	Rationale
1. Inform and contribute to land use policy objectives for West London, specifically the Sub-Regional Development Framework and Local Development Frameworks, to ensure delivery of spatial elements of the economic development vision. Ensure that there is sufficient development land of the right quality to meet the investment needs of West London, and balance the tensions around demands on land use.	SRDF will be the key spatial policy framework for West London. Economic Development Strategy will be informed by and need to contribute and influence future land use policies in West London to meet economic development objectives.
2. Identify and agree a policy for sustainable development of appropriate strategic sites, which provide a mix of development opportunities to meet current and future demand, and encourage mixed use developments.	There are a number of key strategic opportunity areas in West London, which will need to be the focus for support and intervention to meet the anticipated needs for land and buildings for industries, services and housing. An important determinant will be locations close / adjacent to current or planned transport improvements.
3. Promote, manage and enhance the quality of the existing stock of key strategic employment locations and improve transport links to these locations.	There is a need to concentrate actions and realise the potential of future sustainable development on established industrial and commercial locations (PILs and IBPs) in the area.

4. Promote high standards of design and environmental good practice, including encouraging sustainable construction and waste management practices, as well as effectively recycling major industrial sites.	West London needs to make better use of urban / brownfield land and empty properties. Important to promote and secure high quality urban design and ensure better management of the urban fabric.
5. Promote and secure a balance of employment opportunities, including inward investment, support for existing businesses and business incubator facilities.	There is a need to ensure that a mix of employment opportunities is available within the sub-region to meet new investment, indigenous growth and future cluster opportunities. Pan-London and local research has identified a need for quality business incubator units to support higher value enterprises, emerging small companies, graduate businesses and voluntary and community sector organisations in West London.
6. Preserve historic sites and design new cultural buildings to create a sense of community.	To improve people's quality of life within the area where they live.
7. Support the rejuvenation of town centres of all sorts (district, metropolitan, etc) in West London as centres for employment, shopping and living. Design out crime and incorporate mixed-use development in town centres to make them sustainable.	Key policy objective to encourage economic development in town centres, specifically the reuse of vacant and underused land. Economic growth must be concentrated within modern built environments, which offer good public transport provision. A major objective will be to boost the confidence and image of town centres in West London.



Housing

7 Housing

7.1 Background

7.1 Housing has a major influence upon local regional and national economic development. Not only is housing and quality of life inextricably linked, but for any economy to flourish it is imperative that a sufficient housing capacity and a healthy housing market exists to sustain that economy. It is clear however, that in West London there is a chronic shortage of housing. Given also that increased housing provision is necessary to meet the forecast substantial growth in population (45,000 additional homes) and employment (86,000 new jobs) between now and 2016 addressing housing issues is a high priority.

7.2 Good quality affordable housing will not only attract the highly-skilled workers that are needed for an economy to grow, but will also provide a home for the key workers that are needed to sustain any economy. Building homes to bring workers closer to their workplace also alleviates congestion and pollution. It is also important to note that people spend a large proportion of their disposable income on goods and services available within the local area where they live. This spending in turn is likely to have positive effects on local employment and income.

7.3 West London housing can be considered within three broad segments:

- privately owned housing
- intermediate housing (housing accommodation aimed at low to intermediate income earners £15 - £40K)
- social rented accommodation (including council housing).

7.4 It is important that the Strategy addresses all these segments of housing needs. An adequate supply and range of privately owned housing, for example, is essential in order to attract and retain individuals across the whole range of occupations and income brackets to live and work within the West London area. Ensuring an adequate supply of intermediate housing is particularly important for West London in this respect in order to retain low to intermediate income earners within the area. A failure to meet the housing requirements of intermediate income earners would result in many of them moving to areas outside of West London to commute, often on an unsustainable basis, or simply moving to work in other areas. There is plenty of anecdotal evidence, for example, to suggest that intermediate housing problems are a major factor in the recruitment crisis in both education and the health service. The high house prices in West London threaten to undermine government aspirations to raise the quality of public services in the sub-region. Key skill leakages of this nature can only be to the detriment of the West London economy and developing housing initiatives to address them should include open dialogue between employers and housing providers.

7.5 Ensuring an adequate supply of social rented accommodation is also very important and is a strong influencer upon improving social and economic inclusion amongst West London residents. This is important both in terms of bringing economically inactive working age individuals closer to the labour market as well as enhancing the social and community participation and contribution of current socially excluded members of West London's population.

7.6 As well as ensuring an adequate supply of housing, the West London Economic Development Strategy must also address the quality of housing in appreciation of the influence that the quality of housing has upon other socio-economic factors. Much of the housing stock is ageing and such requires investment to maintain and improve its quality. West London also needs a range of good quality housing types to cater for the diverse population. Failure to provide good quality housing is stressed within '*The Real Cost of Poor Homes: Footing the Bill*', published by the Royal Institution of Chartered Surveyors in April 1996, which confirms 'beyond any doubt that bad housing conditions are a factor in producing a wide range of conditions that generate extra costs on health and educational budgets.' The link between housing quality, education attainment and health should therefore not be overlooked.

7.7 Poor quality housing is often linked to medical conditions such as respiratory diseases, gastroenteritis and skin disorders. Improving poor quality housing is likely to lead to an increase in overall health levels of those living in such housing.

7.8 A report produced in August 2003 for the Shepherds Bush Housing Association entitled '*Health & Housing Uncovered*' outlined the strong link between quality levels of rented accommodation and health, concluding that heating, sound insulation, space and security were the most important factors influencing the health of tenants surveyed.

7.9 The links between poor housing and educational disadvantages are complex and cumulative. Children within overcrowded housing conditions often have poor school attendance records. Educational problems are also more prominent amongst children whose families are in temporary accommodation. These findings further stress the need to develop not only an adequate supply of permanent accommodation but also ensuring that the housing is of sufficient quality.

7.2 Strategic Context

7.10 The need to develop decent affordable homes is outlined as a key priority within national, regional, sub-regional and local housing strategic and operational policies. The Government set out its review of the housing agenda in its Housing Policy Statement, '*The Way Forward for Housing*', published in 2000 (with an indication of how these principles could be taken forward outlined in the '*Sustainable Communities in London*' document produced by the Government in 2004). The 2000 document sets out the following key strategic objectives that the Government expects UK local housing authorities to deliver:

- a more strategic role for Housing Authorities
- promoting private rented housing
- supporting sustainable home ownership
- providing new affordable housing
- raising the quality of social housing
- new forms of tenure for social housing
- implementing a new system of affordable rents
- improving Housing Benefit
- promoting choice in social housing lettings
- stronger protection for homeless persons
- tackling social exclusion.

7.11 In April 2003, the Chancellor and Deputy Prime Minister asked Kate Barker, member of the Monetary Policy Committee, to undertake a review of issues affecting housing supply in the UK. The final report was published in March 2004 and concluded that housing demands had been generated largely due to demographic reasons and that regional high house prices place restrictions on labour mobility. This is certainly an issue across West London where the affordability of housing is a decisive factor in attracting and retaining workers across all income brackets.

7.12 The report also outlines that the availability of land is a particular constraint on housing development, again a factor that is particularly relevant in West London.

7.13 In light of the influence that national housing issues have on the availability of key workers, the Deputy Prime Minister announced a new key worker programme to succeed the Starter Home Initiative (SHI) on 21st October 2003. The new programme focuses on those delivering frontline public services, such as health workers and teachers, where there are significant recruitment and retention issues. Around 6,000 key workers are expected to be helped in each of the next two years (2004/05 and 2005/06) in London, the South East and Eastern Regions. The key worker definition currently applies only to certain public sector workers. As such, further consideration may be required within West

London to widen the definition to include key jobs within other areas of the public and private sector that experience similar difficulties attracting and retaining workers due to a lack of affordable housing.

7.14 On a regional London-wide level, key strategic actions outlined in the LDA's Draft London Economic Development Strategy include 'Ensuring an adequate supply, mix and choice of housing that is accessible to all income levels and is suitable to meet the diverse needs of all people.' These are also outlined as key strategic aims within the 2002 London Housing Statement, the West London Alliance Housing Strategy. Given the diverse ethnicity of the West London population and the need to maintain and its sustainable communities, this is a particularly relevant strategic aim for the sub-region. The London Plan also states as its aim:

'…to build up development around locations with good public transport and create more locations people can get to easily without using cars. At the same time there will be a new drive to achieve quality in development: in new buildings, by getting design principles enshrined in project master-planning, and in a new focus on the public realm: the street scene and our green spaces.'

7.15 The London Plan outlines the need to make better use of existing housing and sets out strategic priorities for West London.

- Realise the potential of Wembley as a nationally and internationally significant sports, leisure and business location, co-ordinated with town centre regeneration and new housing.
- Identify capacity to accommodate new job and housing opportunities and appropriate mixed-use development. This is especially important in relation to the Western Wedge, Heathrow Airport, Opportunity Areas and Areas for Intensification. It will include co-ordinating skills development, transport and planning to improve access to jobs for people from deprived communities in the sub-region.
- Maximise the number of additional homes, including affordable housing, by exceeding housing provision targets set out in this Plan and secure mixed and balanced communities.
- Promote and intensify retailing, services, employment, leisure and housing in town centres and opportunities for mixed-use development.
- Ensure that social and community infrastructure is retained, enhanced and expanded where needed.
- Ensure that new development is sustainable, safe, secure and well designed, improves the environment, and takes account of the sub-region's heritage.

7.16 The London Plan sets out targets for the provision of additional homes, which currently range from annual additional home targets of 330 in Harrow to 680 in Brent. Even in the London Plan, however, it is recognised that in reality these figures may need to be greater. For example, within the Wembley Opportunity Area the Plan states that 'new homes expected to be substantially greater than the minimum 400' highlighted within the document. Indeed Brent council recently approved outline planning permission for a major regeneration proposal around the new national stadium site which includes plans for over 3,500 new homes, 40% of which will fall within the affordable housing definition. The Mayor of London will carry out a new housing capacity study in 2004 in order to update the borough figures.

7.17 The London Plan also outlines the spatial dimension of its housing policies within areas for intensification and opportunity areas (see also the Land and Property section of this document). The area of intensification identified within West London is Willesden Junction, while the areas of opportunity include:

- Hayes/West Drayton/ Southall
- Heathrow/Feltham/ Bedfont Lakes
- Park Royal
- White City.

7.18 These opportunity areas have been identified on the basis that they are capable of accommodating new jobs or homes, and as such their potential should be maximised. However, as well as optimising the positive impacts that areas of opportunities offer, the West London Economic Development Strategy must be mindful of potential negative impacts. For example the development of T5 at Heathrow could create potentially negative impacts in terms of increased house prices and rates for rental residential property in the surrounding area. As such, actions will need to be considered to minimise the effect that such price factors may have on the wider economy.

7.19 The 2002 London Housing Statement, jointly developed by the Government Office for London and the Housing Corporation, provides a steer and emphasis for local housing strategies. It identifies the key priorities for action in London within the following broad objectives:

- to decrease homelessness and develop more suitable forms of temporary accommodation and support for vulnerable people
- to develop an effective private sector strategy
- to ensure social housing achieves the decency standard by 2010 and that housing renewal is contributing effectively to wider regeneration strategies.

7.20 As well as addressing issues of supply and affordability, the West London Alliance housing strategy aims to:

- improve the quality of housing – to ensure that all housing in the social rented and a private sector is of a decent standard and that housing services are excellent and continuously improving

- create sustainable communities – to ensure that the social and ethnic diversity of the population of West London is effectively served and that housing plays a full part in promoting the well being of local communities and supporting community cohesion.

7.21 The West London Housing Strategy developed by the six West London boroughs in conjunction with Kensington & Chelsea has been agreed by all seven Local Authorities and work is now being undertaken to implement the recommendations.

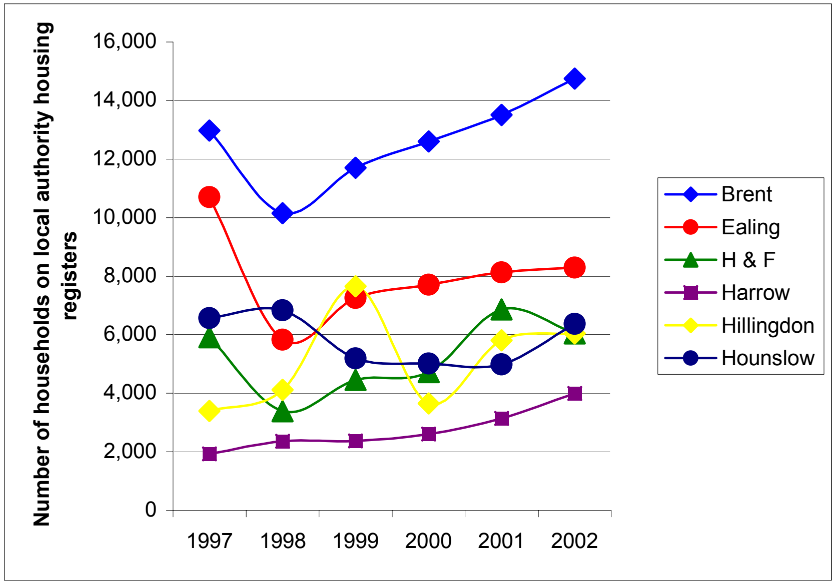
7.22 As well as these strategic documents the implementation of the West London Economic Development Strategy can draw upon the findings of a number of surveys of housing need which are currently in progress. These include a survey of housing needs of key worker groups and an aggregation of housing need data as well as the housing study currently being undertaken by GLA/ALG.

7.3 Key Issues

7.23 The Greater London Authority (GLA) predicts that by 2016 there will be substantial population growth across West London, particularly in Hammersmith & Fulham and Brent. The rate of growth of housing demand is also rising substantially. The main contribution to recent household growth has come from net in-migration (mostly attributable to net international in-migration) and natural growth, but with an additional and growing contribution from social factors such as the tendencies towards a higher divorce rate and people living alone, resulting in decreased average household size. Another contributor to household growth is longer life expectancy. Although the number of people living alone has increased, this does not necessarily translate into demand for small, one-bedroom flats or bedsits, as many people want a spare bedroom for visitors and family.

7.24 In addition to meeting the housing needs of the forecast growth in population and employment, it is essential that housing policies are able to meet the substantial existing housing needs of the sub-region. In particular, housing policies need to meet the needs of those who are unable to afford private sector solutions to their housing need (Figure 7.1 and Table 7.1).

Figure 7.1: Households on LA housing registers, 1997 - 2002



Source: Housing Investment Programme, HSSA, Section C

Table 7.1: Estimated dwelling stock by tenure, 1 April 2002

	Public sector (including social housing) %	Private sector %	Total dwellings
Brent	24	76	104,264
Ealing	19	81	119,644
H & F	35	65	75,206
Harrow	10	90	82,550
Hillingdon	18	82	99,983
Hounslow	24	76	87,560

Source: Housing Investment Programme, 2002

7.25 West London has a particularly transient population. Recent NHSCR migration data highlights that 236,905 people moved into the West London area from other parts of the UK between September 2000 and September 2003. It is important, therefore, that a housing strategy for West London takes into account the role of the sub-region's transient population in order to serve its needs and capture its successful and richly diverse nature. This may be addressed by ensuring that there is a suitable and diverse range of housing that will not only aid immigrants (both international immigrants and also immigrants from other areas of the UK) into the West London economy, but also ensure that after people arrive into West London there is a supply of housing that will meet their future as well as current needs. The main source of accommodation of this nature is likely to come from the private sector and as such it is important that private sector is fully involved in the implementation planning process.

7.26 An important issue in meeting current housing needs within the sub-region is the quality and status of existing housing stock. A relatively high proportion of Local Authority dwellings fall below the decent homes standards or are unfit, particularly in Brent and Hounslow where 59% and 71% of Local Authority dwellings respectively fall within this category.

7.27 Around 90% of all unfit dwellings are owner occupied or in the private rented sector. The private rented sector can therefore play a key role in housing economically active individuals if improvements in standards are made to these dwellings.

7.28 The West London Housing Strategy argues that the private rented sector is a valuable resource, especially for groups such as those requiring employment-related mobility, single people and childless couples and key workers. The overall aim of the West London Housing Strategy with regard to private sector renewal is to 'ensure effective regulation while supporting and encouraging expansion of the sector'.

7.29 The priorities of the private and public sector are often polarised. For example, many private developers will seek to produce more profitable one or two bedroom homes, whereas the public sector often concentrates upon larger two or three bedroom properties that are able to house families. Dialogue with private housing developers is crucial in order to develop the varied supply of housing required within West London.

7.30 Ensuring that a variety of housing is provided is a key concern. Housing is required for a spectrum of income earners – West London is traditionally an area where people of different income levels have lived side-by-side. Housing development plans should aim to maintain this tradition which will not only enable the development of a sustainable economy but also further encourage the diversity and attractiveness of West London.

7.31 Monitoring new housing developments will aid housing strategy development and implementation within West London. In order to achieve this it is important that optimum use is made of the most up to date information and evidence available. The London Development Database offers a source of monitoring data of this nature and can also provide information on all planning permissions granted in London since 1 April 2004; including applications for proposed changes of residential units.

7.32 The wealth of experience that boroughs and Registered Social Landlords (RSLs) within West London possess is invaluable. West

London RSLs are unique in so much that they are strongly community based and have tradition of working closely and strategically together on a number of new and existing housing investment initiatives. In order to maximise the effectiveness of these organisations' housing policies and strategies it is crucial that dialogue is maintained between all parties to ensure that best practice is identified and implemented. Developing a common approach to housing using best practice models adopted by the London Boroughs and RSLs within West London will also help in terms of developing a more geographically targeted housing strategy.

7.33 Each West London borough has established an Arms Length Management Organisation (ALMO) for their stock which will bring in additional resources from central government to enable all properties to be brought up to the decent homes standard. It is important that West London capitalises on these resource and investment opportunities.

7.34 Empty properties within the sub-region are a potential source of supply of housing. Table 7.2 highlights the number of properties within the West London sub-region that were empty in April 2002. Once again, the table clearly shows the importance of working with the private sector to increase the supply of housing.

Table 7.2: Empty properties by tenure, by borough, 1 April 2002

	Local Authority	Housing association	Other public sector	Private sector	Total dwellings
Brent	197	448	257	4,734	5,636
Ealing	261	64	5	1,335	1,665
H & F	259	377	37	3,573	4,246
Harrow	74	20	33	1,030	1,157
Hillingdon	163	150	3	2,785	3,101
Hounslow	273	44	10	1,664	1,991
West London Total	1,227	1,103	345	15,121	17,796

Source: Housing Investment Programme, HSSA, Section A

7.35 Increasing housing density is another potential source of supply. Local Authorities are encouraged to tap capacity through the application of higher densities, including initiatives such as developments over existing buildings such as shops. The London Plan has advocated the intensification of housing provision through development at higher densities particularly where there is good access to public transport. Whilst it is unlikely that there will be universal agreement across all West London boroughs as to what level of density is acceptable, efforts to find potential sites within each borough which are capable of sustaining higher density levels should be made. However, it is essential that any developments aimed at increasing housing density must also ensure that the design is of sufficient quality and conducive to the rich cultural diversity of West London's communities. It is also important that the subsequent management of the estates is carried out in a manner which reflects the overall density already within those areas.

7.36 It is important to stress the need to invest in success and note that investment in housing within West London can provide better value for money in terms of economic impact in comparison with other areas of London. Currently many areas where substantial public sector backed housing developments are taking place (such as those in the East London and the Thames Gateway) are within areas of particularly high levels of deprivation. Within many of these areas there is a relative shortfall of employment opportunities in comparison with West London that inhibit the economic impact that such housing development can have. West London, on the other hand, has the capacity not only to provide decent housing but also improve the economic opportunities for its residents. Furthermore West London has, in relation to other parts of London, excellent opportunities to utilise existing infrastructure improving further the potential value for money of housing support investment. Ensuring that West London lobbies for its fair share of housing support (in terms of grants and resources) from both government and the LDA is a crucial element of the West London Economic Development Strategy.

7.37 Table 7.3 shows the population density in the six West London boroughs. This table reveals the stark contrast between population density in West London and the average density in England and Wales. Even the most sparsely populated area, Hillingdon, is over six times more densely populated than the average GB local authority. It also reveals the wide variations that exist within West London: Hammersmith and Fulham is, itself, almost five times more densely populated than Hillingdon. With over 100 people per hectare, the 2001 Census revealed that it is the fourth most densely populated authority in the UK. Kensington and Chelsea, which developed the West London Housing Strategy in conjunction with the six West London boroughs, has existing density levels which match those of Hammersmith and Fulham and therefore has limited opportunities for further development. Two other boroughs, Brent and Ealing, are more heavily populated than the London average.

Table 7.3: Population density, 2001

	Population Density (people per hectare)
Brent	60.9
Ealing	54.2
H & F	100.8
Harrow	41.0
Hillingdon	21.0
Hounslow	37.9
London	45.6
England and Wales	3.4

Source: National Statistics

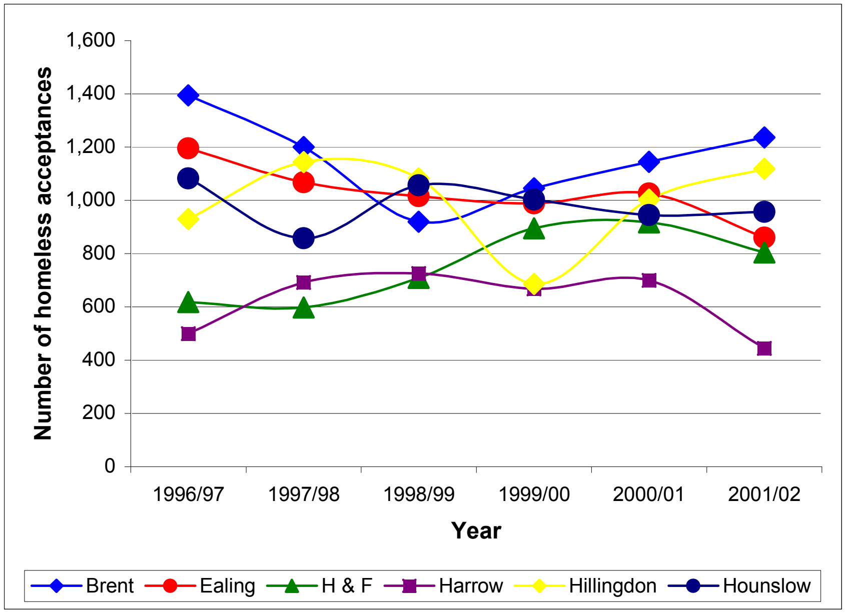
7.38 In West London there is also evidence of rapidly increasing house prices (see Table 7.4), increasing homelessness (see Figure 7.2) and numbers of households in temporary accommodation running well above the average for London (Table 7.5).

Table 7.4: House Prices, 1996 – 2003

Borough	Overall price 2003	Growth in overall house prices 1996 – 2003
Brent	224,652	190%
Ealing	228,710	145%
H & F	327,730	117%
Harrow	228,473	154%
Hillingdon	204,857	154%
Hounslow	224,254	142%
London	240,126	149%

Source: Land Registry Bespoke Reports

Figure 7.2: Homeless acceptances in West London 1996/97 – 2001/02



Source: Housing Investment Programme, HSSA/Housing Operational Information

Table 7.5: Homeless households in temporary accommodation, by borough 31 December 2002

Borough	Total
Brent	3,632
Ealing	2,314
H & F	1,743
Harrow	1,736
Hillingdon	2,001
Hounslow	1,422

Source: London – GLA, England – DTLR P1E returns

7.39 The general shortage of affordable housing in London has been compounded by the fact that, in the last 10 years, the number of low rent homes in London has fallen by more than 50,000 due to the impact of Right to Buy sales and demolitions on housing estates.[14]

7.40 The shortage has also led to increasing number of households in priority need being forced to live for longer periods in temporary housing and in overcrowded conditions.[15] Many others are being squeezed out of

[14] The London Plan.
[15] Homes and Communities in London, London Housing Strategy. London Housing Board, 2003.

living in London and are either travelling longer distances to work or are leaving the capital altogether.[16]

7.41 People living in temporary accommodation may be living in reasonable quality leased accommodation and being charged a relatively high rent which may make them benefit dependent, thus reducing the opportunity for them to be an active part of the West London workforce. One of the aims of the West London Economic Development Strategy should therefore be to ensure that there are opportunities for those in temporary accommodation to join the waged economy.

7.42 Another of the growing consequences of the overall housing crisis is that tenants of both councils and housing associations are increasingly living in overcrowded accommodation, as the opportunity for them to gain a transfer to larger accommodation is reduced because of the overall pressure on housing.

7.43 The West London Housing Strategy outlines the challenge of creating mixed and healthy communities within the sub-region. Indeed, the diversity of the sub-region, coupled with high levels of disadvantage and exclusion, highlights the key role housing can play in building cohesive and sustainable communities.

[16] The London Plan.

7.44 One of the ways to build more cohesive and sustainable communities is to provide greater choice of affordable housing. An example of a choice-based lettings agency is LOCATA. LOCATA currently consists of five West London boroughs (Brent, Ealing, Harrow, Hillingdon and Hounslow) and three Housing Associations (PCHA, Ealing Family and Paradigm Housing) that have joined forces to provide greater choice in lettings.

Housing as an employer and training provider

7.45 It is important to understand the importance of the housing sector as an employer and a direct contributor to the sub-regional economy of West London. The latest Annual Business Inquiry data (producing data for 2002) estimates that over 30,000 people are employed within the construction sector in West London. Despite recent fluctuations in construction employment across the sub-region, job numbers within the construction industry are expected to rise considerably in forthcoming years. Ensuring that a reasonable proportion of this employment consists of West London residents will help to increase income and reduce unemployment within the sub-region. Furthermore, the skills gaps reported in the construction sector are significant, and ensuring training is provided in this sector will benefit both the developers who need a reliable stream of skilled construction workers, as well as those in the local population seeking employment and/or up-skilling.

7.46 Work undertaken for the West London Construction Training Planning Forum sought to develop best practice guidelines for ensuring construction training opportunities on commercial, regeneration and housing association development schemes within West London via the use of tools such as Section 106 agreements. The report highlighted that ensuring that developments use local employment and train local residents in the relevant construction skills is beneficial to all parties involved.

7.47 The West London Construction Training Planning Forum outlined a series of recommendations to help identify which developments could be targeted to improve local employment and training obligations. The Forum recommended that only developments with costs exceeding £2 million and taking more than three months to complete should be considered to be of sufficient scale to accommodate on-site trainees. Further categories of development that were considered appropriate to accommodate trainees included:

- housing developments over 25 units
- commercial developments over 3000 sq.m.
- schemes of strategic importance defined in that the Mayor has planning powers in relation to these projects
- Opportunity Areas as defined in the London Plan.

7.48 The Forum also suggested that employment creation schemes should be targeted towards:

- schemes in identified accessible regeneration areas
- developments that involve the loss of employment space in defined employment areas.

7.49 t is not only the direct employment and up-skilling effects that may benefit the local economy. By ensuring that new housing developments use local suppliers, further growth in the local economy can be attained.

7.50 Housing associations also provide employment for local residents. In particular BME housing associations play a particular role in providing employment opportunities for BME groups within West London and opportunities should be sought to strengthen these roles.

7.51 The process of managing stock, repairs and refurbishment is also an area where West London can aid economic development. By training and employing local residents to maintain its housing stock the local authorities that comprise West London can not only provide routes into employment for the unemployed, economically inactive and low-skilled within West London, but also provide a growing pool of construction workers – an area that currently suffers from skill shortages within the sub-region.

7.4 Objectives and Rationale

Objectives	Rationale
1. Encourage an appropriate mix of housing provision, e.g. tenure, type, size, reception, move on.	There are both social and economic reasons for maintaining the broadest possible mix of households. This is essential to the continued economic growth of West London and particularly in encouraging a range of professional skills necessary to maintain the sub-region's role as a key driver in London (see Business Competitiveness section).
2. Increase supply of affordable housing for rented, key worker, shared ownership (where it meets local need) and supported housing.	Need to provide housing for those unable to afford private sector housing. The London Plan has argued that the bottleneck in moving families into permanent social housing must be addressed. Affordable housing is necessary to reduce the number in people in temporary housing and caught in the poverty trap. Key workers and other lower paid workers are essential to the West London economy, the social economy and social infrastructure of the sub-region, and they need to be able to live in reasonable accommodation well located for employment and the full range of community and social facilities. Key workers such as teachers and social workers, earning public sector wages, face a significant equity gap. Supported housing is needed as care needs change. This type of accommodation is important as it enables employment for local people in the care sector, and enables younger residents to move gradually from the streets or institutional care into the community.

3. Improve quality of older housing stock and adjacent public space.	The amount of newly built housing in London in any one year represents a tiny proportion of the total stock (less than half a per cent).[17] The older housing stock in the poorer areas is deteriorating and needs investment in it and the public realm around it. This will also contribute to improving sustainability of housing.
4. Engage with the rented (private and RSLs) sector to raise standards and establish dialogue between LA planners, RSLs and private developers about increasing supply.	The private sector has an important role to play in terms of providing and improving rented accommodation as well as new housing developments.
5. Local Authorities across the West London sub-region should promote a reasonable amount of employment for local workers and support local employers within local housing development initiatives.	The construction industry, including housing construction, is an important employer within West London. Ensuring that at least a proportion of this employment is directed towards West London residents will help to increase income and reduce unemployment within the sub-region.
6. Promote sustainable housing, including waste management good practice, sustainable construction practices and design for the whole human life cycle.	Houses need to be built to a high standard of design (whilst controlling costs) so that they enhance and sustain communities. Sustainable materials and local labour should be used in the development of sites.
7. Ensure higher density build where appropriate and where sustainable homes can be built, particularly where there is good access to public transport.	Higher density build is an additional source of supply of housing. It also means there is less demand on open spaces.
8. Provide greater choice of affordable housing.	This is necessary to meet demands of different target groups and to encourage mobility in the sector. A choice-based letting agency for West London has been established – LOCATA. Not all of the West London boroughs have yet signed up to it, although it is expected that they will do so in due course.

[17] Market failure and the London housing market, GLA Economics, 2003.

9. Ensure sufficient availability of intermediate housing.	It is important for the West London economy to retain workers on low to intermediate salaries (between £15,000 and £40,000 per annum) within West London.
10. Develop more cohesive and sustainable communities by, for example, breaking up areas of dense, poor quality social housing by including a mix of tenures.	Will improve the overall well being of people from diverse backgrounds living within the same communities.
11. Ensure that West London lobbies strongly for its share of housing support and resources.	West London has excellent housing development opportunities that offer good value for money in relation to other areas of London.

Transport

8 Transport

8.1 Background

8.1 The aim of this part of the Strategy is to prioritise strategic objectives for changes in West London's transport network that catalyse and support the future economic development of the sub-region, as well as seeking to pave the way towards establishing an overall vision and blueprint for the future of its transport network. This blueprint should aim to develop a transport system which both safeguards and contributes to the wider economy by facilitating the efficient movement of people, materials, goods and ideas.

The Transport Network and Economic Development of West London

8.2 Access to an effective transport network is at the very heart of achieving the vision of the West London Economic Development Strategy in creating both a competitive and sustainable economic environment. It is also consistent with the London Plan's strategic priority for West London of improving access to available employment sites and meeting the identifiable demands for employment and land. Furthermore, as the London Plan makes clear, the relative lack of brownfield development land in West London, compared for instance with East London, means that planned growth will need to be more focused on higher intensity development areas with potential to establish good accessibility by public transport.

8.3 A highly efficient transport network is a crucial requirement underlying West London's conversion towards a modern knowledge-based economy. The Economic Development Strategy as a whole seeks to outline the various wide-ranging components required to achieve this aim, many of which are necessarily reliant on the standard and effectiveness of West London's transport network. For instance, attracting potential and retaining current inward investors in and to West London is dependent on providing high levels of accessibility for the movement of both people and freight.

8.4 An effective passenger transport network is an important factor in ensuring high levels of social inclusion and enabling socially excluded individuals to take advantage of opportunities aimed at improving their employability and skills. Also, the relative standard and capacity of the passenger transport network plays a role in establishing a culture of workforce development in economies such as West London where the very high number of micro and small businesses means that most workforce training has to be undertaken at a location outside of the business. Fundamentally, the transport network has an important role to play in stimulating the demand for workforce development across West

London and improving access to training opportunities for currently excluded groups. Without improved access many of those currently outside the workforce, as well as existing employees, will be unable to attend and visit key training locations.

8.5 The further development of knowledge-based clusters of economic activity in and around West London, involving actors from the business and higher education sector, will be best facilitated through an infrastructure that enables the vital face-to-face interaction underpinning cluster development to occur without individuals needing to overcome significant travel and transport barriers. Also, the increased supply of housing foreseen for West London will increase the burden on the transport network, and in particular the public transport system.

Key Drivers

8.6 The key drivers of future economic change across West London will necessarily have a major impact on the requirements of the sub-region's transport network. For instance, as air transport and Heathrow Airport continues to grow, sectors such as logistics and distribution will further flourish. Also, further pressure will be put on existing roads as West London continues to be the most important national and international gateway to London via Heathrow and from other parts of the UK. In particular, the economic impact of Terminal 5 must be strongly balanced against negative environmental impacts. The Government inquiry into the development of Terminal 5 concluded that the benefits of Terminal 5 will substantially outweigh the environmental impact provided its effects are properly controlled. It is clear that the number, routes and times of flights, as well as access to Heathrow by car, must be closely managed.

8.7 Although Heathrow is a key driver of the West London economy, it will not be the only one. Employment growth in areas such as Park Royal, Wembley and White City will result in changing transport requirements across the whole of the sub-region.

8.8 Some of the primary concerns for West London that impinge on the sub-region's transport network are:

- strong future population and employment growth
- the redevelopment of Heathrow Airport
- the construction of the national stadium and additional new investment at Wembley
- the ongoing modernisation of Park Royal
- the development of White City.

8.9 It is clear that the overall economic development of West London needs to be set within a framework for establishing strong relations between those responsible for creating efficient and diverse land uses and the sub-region's transport network.

Key Data

8.10 It useful to summarise some of the key statistical data on travel patterns and modes in West London (more detailed data is shown in the Appendix) in order to further frame the context of the above developments. Importantly, a significantly higher proportion (40%) of residents drive to work in West London compared with the London-wide proportion (34%). In terms of public transport journeys, 49% of these journeys in the sub-region are by National Rail, less than the London-wide proportion (56%). The Underground has the second largest share of public transport journeys at 38%, which is significantly higher than the London-wide proportion (28%).

8.11 Almost three-quarters (72%) of all trips originating in West London are made wholly within the sub-region, while more than one half (55%) of these are made by car. Overall, public transport accounts for 56% of the trips made to Central London, compared to only 16% of trips within West London. This highlights the dominance of radial public transport into Central London, especially for work, as well as the relatively small role currently played by public transport for other trip categories in suburban West London.

8.12 For all weekday private transport trips originating in London as a whole, 19% are destined for West London, with only East London (22%) and South London (20%) having a higher number of destined trips. However, if weekday private transport trips from outside London were included it is likely that West London would have the highest proportion of destined trips.

8.2 Strategic Context

8.13 In establishing a blueprint for the future development of West London’s transport network, it is vital that stakeholders from the sub-region seek to work closely with those responsible for the development of London’s transport network as a whole. It is through such collaboration that the particular challenges faced by the West London transport network can be addressed in a manner coherent across London.

8.14 In order to develop such collaboration it is important to understand the strategic and policy context within which the current and future development of West London's transport network is set. In broad terms, this context will consist of a number of key documents that will offer a framework for the future development and planning of both London as a whole as well as the West London sub-region, and in particular its transport needs. These documents are:

- the Draft London Economic Development Strategy
- the Mayor's Transport Strategy for London
- the Mayor's London Plan
- approved Local Implementation Plans of the West London boroughs
- the West London Sub-Regional Development Framework of the London Plan.

The strategic context will also include government policy and strategy – a new 10 year plan etc and the policies and strategies of SERA.

London's Economic Development Strategy

8.15 Overall, the Draft London Economic Development Strategy does not deal in depth with the transport issues facing London, but rather sets them within the broad context of the further economic development and regeneration of London. It raises key transport issues with respect to the future development of the network in West London.

- The transport network across London has come under increasing pressure, particularly in terms of its ability to deliver to key workers.
- Falling travel speeds and declining transport reliability are both reducing London's productivity. It makes clear that without further investment there is the real threat of a permanent loss of competitiveness.
- The priority for the phased completion of Crossrail Line 1 by a target year of 2012.
- That lessons are learnt from previous intervention and that successful pilots are scaled up whenever appropriate.
- That a fully accessible transport network for both travellers and freight is needed to make London easy to travel around.
- London's international transport links and its roles as an international transport hub and gateway to the wider South East region and rest of the UK need to be supported and developed.

- The requirement to secure funding for vital improvements to the existing transport system, and to implement the Mayor's Transport Strategy.

8.16 The raising of these issues within the Draft London Economic Development Strategy implies that from a transport perspective the key role of the Strategy is basically to ensure the implementation of the Mayor's 2001 Transport Strategy for London.

The Mayor's Transport Strategy for London

8.17 The key aim of the Mayor's Transport Strategy is to support the vision of London as an exemplary world city through increasing the capacity, reliability, efficiency, quality and integration of the transport system to provide the world class transport system the capital needs. The key transport priorities underpinning this are:

- reducing traffic congestion
- overcoming the backlog of investment in the Underground
- making radical improvements to bus services
- better integration of the National Rail System with other transport systems
- increase the overall capacity of London's transport system
- improving journey time reliability for bus users
- supporting local transport initiatives
- making the distribution of goods and services in London more reliable, sustainable and efficient
- improving the accessibility of London's transport system
- bringing forward new integration initiatives.

8.18 This Strategy laid out a 10 year vision for development between 2001 and 2011 and is ongoing at the present time, with the close involvement of London's boroughs through annual borough Spending Plans and the proposed Local Implementation Plans (LIPs). However, the publication and recommendations of the London Plan in February 2004 means that the Mayor's Transport Strategy may have to be reviewed shortly in the light of this Plan.

8.19 This review of the Mayor's Transport Strategy will be the key means by which stakeholders can influence the development of London's pan and sub-regional transport networks. Other routes include the progression of Sub-Regional Development Frameworks that will accompany the London Plan – highlighted below – which will involve a consideration of transport issues in relation to land use, as well as working directly with Transport for London to discuss and resolve issues.

The London Plan and Sub-Regional Development Framework

8.20 The London Plan advocates an integrated approach to transport provision and development, making major improvements to public transport and tackling traffic congestion, with a commitment to making public transport and the pedestrian environment accessible to everyone, especially disabled people. The five key transport themes covered by the Plan are:

- the integration of transport and spatial development
- enhancing international, national and regional links
- better public transport
- reducing congestion
- freight.

8.21 A recommendation of the London Plan, which is currently being implemented, is the development of five Sub-Regional Development Frameworks (SRDF) that act as the spatial masterplans for future infrastructure projects at a sub-regional level.

8.22 The Plan states that the objectives of the West London SRDF should include securing local and sub-regionally important public transport improvement and reducing pressures for car use and parking. Among the wide-ranging strategic planning priorities the Plan sets for

West London, it highlights the need to capture the benefits of the economic generators, including Heathrow, within the sub-region for residents, while ensuring that this development improves not degrades the environment.

8.23 The London Plan also states that in West London there is a need to plan for and secure the necessary financial resources to deliver planned transport infrastructure for the sub-region, including local schemes that improve public transport, walking and cycling connections to town centres and employment locations. The particular priorities set for the sub-region are Crossrail 1, the West London Tram, improved bus services and enabling more sustainable access to Heathrow Airport.

8.24 In terms of the spatial priorities for West London, the London Plan states that strategically designated town centres in the sub-region should be considered as opportunities for more intensive development. According to the Plan, the forthcoming SRDF should be exploring the implications of developing a wider role for Uxbridge, of better integrating Ealing Broadway/West Ealing and Shepherd's Bush/White City, regenerating Wembley, the implications for Hounslow's Western International Market, and the intensification of Harrow and Hayes.

8.25 Although West London is served by the London Plan the majority of future public transport improvement it proposes cover developments across other sub-regions – in particular, East London – which is very much in line with achieving the spatial development priorities of the Plan as a whole. It is also in line with more general London transport policy promoting development in East London (e.g. East London Line, East London and Greenwich Transits, DLR extension, and the Thames Gateway Bridge) and more 'restraining' policies for West London (rejection of M4, M3 widening, congestion charge extension, road area charging pilots, and high occupancy lanes pilot). This suggests that there is an important role for local stakeholders in West London in ensuring that the London Plan is implemented in a manner that is as appropriate as possible to the needs and requirements of West London.

8.3 Key Issues

Public Transport Accessibility

8.26 Within the London Plan there is a priority to improve access to and within town centres and their residential hinterlands by public transport – including by improved bus services, walking and cycling – and between town centres by improved bus services, more frequent rail services and, where appropriate, new tram and bus transit schemes. The Plan also notes the need for enhanced bus services, pedestrian facilities and local means of transport to improve accessibility to jobs for the residents of deprived areas.

8.27 The Plan sets an objective of increasing the capacity, quality and integration of public transport to meet London's needs. In particular, the Mayor is to work with strategic partners to increase the capacity of public transport in London by up to 50% and to improve the integration, reliability, safety, quality, accessibility, frequency and attractiveness of the existing public transport system. The key question for West London is if and how this can be achieved in the sub-region, in particular what new initiatives are required beyond those already approved, such as Crossrail.

8.28 The Mayor is to work with strategic partners to facilitate the phased implementation of public transport improvements and to co-ordinate improved public transport capacity as closely as possible with its development priorities and phasing. This indicates that in West London there is a need to evaluate the current and future accessibility requirements of the public transport system set against those infrastructure and transport developments planned to take place.

Strategic Intervention

8.29 The current planned strategic transport intervention covering West London primarily consists of:

- Crossrail Line 1
- the establishment of a number of major strategic interchanges
- the West London Tram
- improvements to the West London Line (as part of Orbirail).

8.30 According to the London Plan, the West London Tram, along with increased bus priority, will:

- improve access to town centres and the rail and Underground networks and the suburbs
- provide public transport options that offer a real alternative to cars, including orbital journeys
- support development and regeneration priorities.

8.31 The West London Tram (or West London Transit) proposal is an example of the commitment to the innovative, high quality, efficient and high capacity public transport that West London needs, and is an exemplar of how a local initiative – in this case the success of the Uxbridge bus routes – can be positively built upon. The Tram proposal will complement Crossrail by providing local access into and through town centres on an important radial corridor. Support should be given to West London boroughs seeking to develop further transit routes of various types within the sub-region in the longer term.

8.32 Also, the establishment of new strategic interchanges is welcomed, as is Crossrail Line 1, which represents an opportunity to alleviate current transport problems both in West London and London as a whole. Crossrail will improve access to and through Central London, thereby making the Crossrail corridor in West London a more attractive place to live, work and run businesses. It has the potential to improve access into West London, thus widening the local labour market. It also has the potential to improve access within West London by providing services at local stations and from certain local stations to Heathrow, and offers a genuine opportunity to expand westwards to Maidenhead.

8.33 In this context, it is important that the role of the West London Line, which forms the eastern boundary of West London, is not overlooked. Service improvements for the line include planned and committed additional stations, increased frequencies and, in the longer term, interchange with Crossrail and integration with the East London line extensions to form 'Orbirail'. The realisation of these plans and commitments will greatly improve orbital public transport in the eastern part of the sub-region and avoid the need for travel via Central London to reach many destinations.

Developing West London's Public Transport System

8.34 The transport network in West London is not managing to keep pace with the sub-region's restructuring and overall regeneration, particularly across its suburban centres. The further rejuvenation of West London's town centres can only be achieved through improving their accessibility. Furthermore, there is a shortfall in the standard of the heavy and light rail network in West London for both freight and passengers, especially in relation to stations, stock, capacity and lines. There is a similar shortfall in bus routes and respective vehicle fleets.

8.35 Passenger overcrowding on national rail commuter lines in the morning peak period is predicted to increase by 2016 even with the introduction of Crossrail – based on Crossrail operating via the Hayes, Heathrow and Harrow lines – although it is not clear that Crossrail will operate via these lines. Overall, large increases in public transport use are forecast to occur over the next decade or so, with passenger kilometres on national rail expected to increase by two thirds (including Crossrail) and passenger kilometres in crowded conditions expected to increase by 18%. Passenger kilometres on the Underground are expected to increase by one quarter, although the number of passenger hours spent in crowded conditions is expected to fall by 10% – mostly due to transfer to Crossrail. Finally, passenger kilometres by bus are expected to rise by almost a third.

8.36 It is important to prioritise interventions that both alleviate present problems and address future requirements created by increased numbers of residents and workers. A focus on raising the quality of public transport to major employment locations and improving access to all centres in West London is a major issue in this respect. This is particularly so given that West London's centres and the areas around them offer major opportunities for economic and housing growth, and the best opportunity for meeting access requirements without increasing the burden on the road system. Therefore, there is a need to provide high quality access to all centres and main employment concentrations in West London.

8.37 Improving public transport accessibility between the outer and inner areas of the sub-region will serve to reduce the number of relatively long intra-West London car journeys and reduce the parking space burden within employment and shopping centres. Also, a reliable public transport system, which also connects key nodes, employment sites and town centres is essential for the most vulnerable groups who are less likely to have access to car travel, such as women with children, individuals with a disability, the elderly, new migrants and school children.

8.38 The improvement of environmental conditions, whilst at the same time accommodating travel growth, can only be achieved if a higher proportion of travel is undertaken by public transport. This in turn will only be achieved if the public transport system – especially the bus network – operates reliably and efficiently, and a culture of public transport use is created. This requires investment in both quality and marketing. An important feature of increased quality includes the expanded use of accessible, low floor buses for the elderly, disabled and wheelchair users. In addition, there is a need for enhanced bus priority that improves the reliability of bus services without in itself worsening conditions for general traffic. Also, the location of depots and garages for public transport should not be overlooked, and real consideration needs to be given to developing suitable sites, at a reasonable cost and with good access for employees.

8.39 High quality radial travel is an important function of West London's transport infrastructure, providing access to the highly specialised jobs and facilities in Central London. Further investment, particularly in Underground and national rail lines, is needed to allow people living and/or working in West London to reach Central London quickly and reliably in uncrowded conditions.

Network Integration

8.40 As the London Plan makes clear, good transport interchange facilities contribute significantly to network integration and efficiency, and new development opportunities can be created as part of interchange improvement projects and in turn, new developments can help fund and deliver improvements to interchange facilities.

8.41 From both a social and economic perspective, the transport network plays the most important role in attempting to improve the 'permeability' of West London. However, the current network is fragmented and lacks integration. There is a strong requirement for integration and enhanced levels of interchange across different transport modes. The further development of key interchanges is of particular importance to West London given that the transport network serves such a diversified range of passengers, including those commuting to and from other parts of London, as well as from outside London to Central London via West London.

8.42 From a social perspective, it is important to support the work of Local Community Transport schemes, which provide affordable and accessible transport for local disabled people, as well as for voluntary organisations that work with socially excluded communities. Examples of these schemes include transport for disabled individuals, mini buses for outings, transport to and from hospital and Brentlink – a joint pilot project between Brent Community Transport and the Borough of Brent that provides access to the main public transport stations and shopping centres for vulnerable individuals who are not well served by local public transport.

8.43 The further integration of the transport network and the development of interchanges need to be set within the context of the planning recommendations underlying the forthcoming West London Sub-Regional Development Framework. Indeed, it is clear that the implementation of this Strategy as a whole can only be effectively undertaken once there is clarity as to the spatial dimensions of the framework contained within the Sub-Regional Development Framework.

Car and Road Management

8.44 Congestion in West London is severe compared with the rest of London – excepting Central London – and many radial and orbital routes need upgrading to meet both current and future demand. The main road routes are predominantly east-west and include the M4 motorway, the A4 and the A40. The major north-south/orbital route is the A406 North Circular. West London has relatively high traffic levels due to higher than average car ownership – as shown by Table 8.1 – and its location between London and the West of England and South Wales, and the presence of Heathrow Airport.

8.45 The majority of the development undertaken in the past 20 years across West London has been geared towards access by car, since as we have seen it is relatively poorly served by public transport resulting in a high car mode share for employment and other purposes. Also, the regular working hours for many of the employees in key sectors in West London have start or finish times outside periods for which public transport is available. In a number of major employment areas, such as Park Royal, the Underground stations are situated at the periphery with no available inter-nodal transport and lack accessibility by railway for the substantial workforce commuting from outside of London.

Table 8.1: West London Road Vehicle Ownership – Number of Cars or Vans in the Area per Household

Borough/Area	All cars and vans in the area per household
Hammersmith & Fulham	0.65
Brent	0.88
Ealing	0.96
Harrow	1.19
Hillingdon	1.21
Hounslow	1.03
West London	0.99
Total London	0.87

Source: Census 2001
All cars and vans in the area' includes only those cars and vans owned by; or available for use by; households

8.46 Given the existence of certain skill shortages and recruitment difficulties, as well as the high cost and relative competition for sites, continuing congestion will serve only as a further barrier to establishing a fluid and integrated labour market across the sub-region. However, as noted by Transport for London, highway vehicle trip generation between 2001 and 2016 is expected to increase by a total of 4% in West London (the largest percentage increase in London), where the additional car trips generated by 2016 will be almost as many as in the East sub-region, where population growth will be well over twice that of West London.

8.47 Within West London there is already a shortfall in the provision for commuter parking and level of accessibility to industrial sites. These key industrial sites include Park Royal, Hayes/West Drayton, and Shepherd's Bush/White City. The high number of distribution businesses in Park Royal, for example, means there are additional pressures on the surrounding road network.

8.48 There is also a need to ensure that the major commercial office growth nodes around Heathrow, Wembley, Stockley Park, Bedfont Lakes, and Chiswick Park are also effectively provided for. For example, the redevelopment of Wembley will put further strain on a road network that already falls short of requirements. Furthermore, Chiswick Park, Stockley Park, along with the Great West Road need to be well served if they are to consolidate or regain their positions as prime employment locations.

8.49 There is, therefore, a strong requirement to assess and fully understand the best means of alleviating the high volume of road traffic in the sub-region, and the strain this is exerting on the existing road network. There must not be any ill-considered moves to reduce car usage in the short term, since within the undertaking of this assessment there are three broad, although not necessarily exclusive, options for intervention of which full account must be taken:

- further development of the road network
- managing the demand for access to the road network
- providing alternatives to the road network.

8.50 As far as further development of the road network is concerned, the London Plan is explicit in its opposition, fully endorsing the '*Managing our Roads*' report, which states that 'Although there are exceptions…there is only limited capacity for tackling urban congestion by increased road capacity.' However, the Plan does state that there may be some cases where new roads are needed to support regeneration, improve the environment, increase safety or provide essential local services. Given the regeneration strategy for West London, based on the development of areas of opportunity and intensification, there is a requirement to explore whether some further expansion and/or enhancement of the current road network is the only means of fully realising the benefits of these developments.

8.51 The preferred option laid out in the London Plan is tackling congestion through reducing traffic, with the stated aim being between 2001 to 2011 to reduce traffic growth in outer London by a third, and seek zero growth in outer London town centres. The Plan further states that the Central London congestion charging scheme contributes to spatial development policies by reducing substantially congestion in the Central Activities Zone and that the Mayor will consider possible schemes for demand management elsewhere. Therefore, it should clearly be a role for West London's stakeholders to scope any requirement for such demand management in the sub-region and to analyse these against the costs and benefits of other alternatives. A prerequisite being that the financial proceeds of any such initiatives are directed towards improving West London's transport infrastructure.

8.52 Previous studies, in particular the Thames Valley and Orbit Multi Modal Studies, have considered the possibility of road user charging as a means of allowing the continuation of growth in the area whilst improving traffic conditions on the road network, with the suggested introduction of a road user charging zone around Heathrow.

8.53 With reference to other modes of demand management, there have already been a number of attempts to secure a mode shift away from cars for areas of West London that are large scale attractors of car traffic. Examples of these include the BAA Travel Plan targets for access to Heathrow which set an original target, between 1996 to 2001, for 50% of car mode transport to be shared. Furthermore Stockley Park set an original target of a 20% reduction in car use for commuting between 1997 to 2002. . However, the extent to which these initiatives have met their targets is not clear, but given the high car mode share for travel to and within West London it may be beneficial to establish Travel Plan initiatives at the sub-regional level.

8.54 From a parking perspective, both the London Plan and national and regional planning guidance recommend that parking in new developments is subject to maximum limits. This means there is a possibility that by allowing higher levels of parking, local authorities outside of London could gain competitive advantage in attracting new business investment. Local authorities in and around West London should conform to the maximum parking levels when deciding upon new developments, and adopt maximum standards that are harmonised across borders, in order to reduce the risk of losing new investment to other regions. Local authorities in West London should liaise with planning bodies in South East England in order to address the issue of parking standards.

8.55 As the London Plan identifies, the amount of parking provision in new developments should be related to their accessibility by public transport. Parking limitation and control will be an important means of managing demand for car travel and supporting the use of alternative means of travel. Current controls on parking in residential streets and around stations will need to be extended as part of an overall parking and traffic management strategy. Also, Park and Ride schemes have the potential to be further developed in West London, particularly as a means of reducing longer distance car commuting into West London from parts of South East England. A potential fiscal solution is to allow companies – many of which already provide free parking to employees with no taxable benefit arising – the facility to offer employees free or subsided travel passes.

8.56 The most obvious form of alternative provision is the further development of public transport facilities. In order to attract car users, the quality of public transport will need to be enhanced, while at the same time providing benefits to those who depend on public transport. To the extent that public transport use increases, a proportionate response in terms of extra capacity will need to be met, as well as the development of new key transport interchanges.

8.57 For relatively short journeys within West London, there is a requirement for the better provision and promotion of non-motorised travel modes. Options here include the promotion of cycling for which West London has a number of advantages including the fact that the outer parts of the sub-region have lower densities and often more space to accommodate cycle paths and lanes, as well as cycle and ride schemes having the potential to operate at stations on both Underground and National Rail routes.

The Significance of Heathrow Airport

8.58 A major feature of West London is the presence of Heathrow Airport, which not only generates a huge demand for surface travel on the western fringe of London – as well as to the centre – but also provides substantial employment. As highlighted within the business competitiveness chapter, the role of Heathrow Airport is vital to the economy of West London, being the single most important generator of travel and employment in the sub-region. It therefore merits special attention, justified by its prominence as an employment centre and transport hub. However, at present Heathrow is operating significantly over its designed capacity. Furthermore, the growing demand for air travel to and from the London area could result in the throughput of passengers doubling by 2020.

8.59 In general, the growth of Heathrow needs to be facilitated in line with established environmental pollution limits, while also enabling visitors and employees to reach the airport reliably. Growth without increased pollution will be best managed by improving accessibility through public transport investment. Indeed, much of the planned transport investment – especially rail – is linked to air traffic growth, namely passenger, employee and freight growth.

8.60 The airport and its associated activities place much heavier burdens on road and rail facilities than occurs in the outer parts of other sub-regions, with future pressure further increasing due to the opening of Terminal 5. Crossrail will help to cater for much higher passenger numbers at Heathrow in the long term. However, in the short term there is a need to reduce trip generation rates by both employees and passengers.

8.61 The London Plan states that further proposals for improving public transport access will need to be developed and implemented alongside any plans for new runways or terminals. Although both the Piccadilly Line and Heathrow Express are to be extended to the new terminal before it is opened (with Heathrow Express stopping half-hourly at Ealing Broadway, West Ealing, Hanwell, Southall and Hayes), the implementation of Crossrail is vital to ensuring the efficacy of the public transport system to and from Heathrow.

8.62 At present the full economic benefits of Heathrow Airport are not being maximised by West London, due to high levels of outflows of associated activities to other regions and sub-regions. The London Plan states that West London needs to capture the benefits of key economic generators such as Heathrow for the sub-region's residents, whilst ensuring that this development improves not degrades the environment. In this respect, there is a requirement to ensure that the sub-region's transport network plays a strong role in minimising the leakage of the economic activity, associated with Heathrow, out of West London.

Environmental Quality

8.63 The Mayor's Transport Strategy recognises West London, especially the Heathrow area, as a problem sub-region in terms of air quality. Any proposed expansion of Heathrow must be set within a framework that understands where advantages lie and then avoid, minimise or mitigate the adverse impacts of the decisions made. The impacts concern quality of life objectives, as well as actions relating to the need for traffic limitation via surface access to the Heathrow area. The decisions regarding Heathrow also have a wider dimension in terms of the future overall level of air transport, and its distribution between UK airports.

8.64 In general, it is in the interests of the public and businesses in West London to improve air quality and noise and maintain them within sustainable levels. The West London economy is clearly very dependent on Heathrow Airport and related activities, and any planned increase in air travel capacity will only be possible as long as there is no further environmental deterioration in air quality and noise.

8.65 It may be appropriate to consider congestion charging if it becomes necessary to achieve the overall objectives of the West London Economic Development Strategy. Overall, priorities in this area will need to be linked to the Government's forthcoming study on air quality at Heathrow as well as the West London Air Quality Plans and their emerging work. Hillingdon Council has drafted an Air Quality Action Plan that outlines a number of options that have been grouped into a series of packages and are summarised in Table 8.2.

Table 8.2: Summary of Options to Improve Air Quality in Hillingdon

1. Reduce emissions from road transport	• Increase use of public transport
	• Develop transport infrastructure
	• Further develop traffic management systems
	• Promote cleaner vehicles
2. Emissions from specific sources within the borough	• Measures specific to Heathrow Airport
	• Measures specific to local industries
3. Actions to be undertaken by the Council to promote more effective use of resources in the borough	• Use of planning systems to improve eco-efficiency in the built environment and promotion of travel planning
	• Dissemination of information on ways that the public can contribute to improved air quality
4. Ensuring effective collaboration with other parties	• Actions to be taken in liaison with the Mayor and neighbouring authorities
	• Lobbying international and national government on measures that are outside the control of local government

Source: Hillingdon's Air Quality Action Plan, Draft, January 2004

Freight Transport and Management

8.66 West London has a number of features that mean it has a strong freight industry presence. These include the location of Heathrow, its proximity to Thames Valley, major industrial estates (especially Park Royal) and various town centres. The presence of Heathrow has led to a 'clustering' of international businesses, freight forwarding agents, and transport and distribution companies in the sub-region, which in turn attract other businesses to locate in the vicinity. Heathrow is the UK's main freight airport (with most of the freight being carried in passenger aircraft), and the emphasis in the London Plan on the regeneration of brownfield sites anticipates further business development around the airport.

8.67 The various forms of freight activity taking place in West London are all adversely affected by congestion, particularly at peak hours. Good access to the motorway and trunk road network is essential as are reliable journey times on the M25, M4 and A40. The M4 and M25 are two of the freight industry's 'Trade Routes', which are roads considered to be fundamental for economic growth but most in need of investment. In particular, access is important to the M25, which provides a link to South East England, the Midlands and beyond. The Western Wedge area very much faces Thames Valley, and this means that links between the two areas need to be fit for purpose allowing the efficient movement of goods to support economic growth.

8.68 In general, due to the high flow of freight traffic between West London and South East England it is essential that there is policy integration and co-ordination across the two areas. This is already recognised in the Government Office for the South East's Regional Transport Strategy, particularly in relation to further development of inter-modal interchanges for freight movement. It should also be reflected within West London's Sub-Regional Development Framework.

8.69 The pressure on land needed for transport, distribution and warehousing is a further issue of concern. These are typically low value activities from a property development point of view, and other forms of development are often considered more attractive to developers. Given the importance of freight to West London, it is essential that suitable locations for freight activity with good access to the strategic road network are identified and protected wherever possible.

8.70 There are already a number of positive and innovative developments related to the provision of warehousing facilities in West London. The establishment by BAA of a number of sector consolidation centres, for example, has significantly enhanced the interface between distributors and retailers in dealing with freight carried by air.

8.71 The rail freight dimension is also important. The Willesden rail freight terminal is a Channel Tunnel rail freight facility serving London and South East England, and it is important that the rail network has sufficient and suitable capacity and capability for international traffic. However, the site is not best located to act as a 24/7 inter-modal freight facility and the SRA has identified the need for another large rail freight facility in the Heathrow area in order to support growth in rail freight. If this is to be achieved bypass routes for London will become even more important as will capacity on routes such as the West London Line, which is a key route for freight.

8.72 The lack of rail freight facilities at Heathrow, with the airport possessing neither freight rail links nor a terminal, will need to be addressed in the future, given the increasing demand for air freight services. Coupled with this, the rise in security threats has increased the burden on the freight sector, particularly freight transported by air, with the long-term impact consisting of heightened costs and slower delivery.

8.73 Access to a large number of premises and sites in West London remains difficult, due to both poor road infrastructure and road management systems. For instance, within the Park Royal area signage for delivery vehicles has needed to be reviewed, with the congestion caused by commuter traffic having an effect on access to the estate.

8.74 There are also a number of town centres requiring deliveries and servicing, and where appropriate provision needs to be made for freight. Town centre servicing in West London is often hindered due to access being made more difficult by cars already parked nearby, which is not always helped by a general lack of understanding of needs from the relevant authorities and agencies.

8.75 Some consideration should be given to allowing lorries and other commercial traffic access to bus lanes in town centres, as well as reserved lanes on motorways, to ‘speed-up’ movement and reduce environmental effects. Overall, there should be more government support to reward freight operators who work toward improving environmental standards.

8.76 The freight industry view any expansion of the congestion charging area into West London as significantly increasing the financial pressures on those businesses operating in the sector. It may also compromise the overall competitiveness of Heathrow, compared with airports located elsewhere. If this were to occur, however, there must full coherence nationally (and internationally if possible) with regard to any congestion charge signage, systems, rules and fee categories.

8.77 In general, the freight industry’s preferred means for starting dialogue on the above issues is via the West London Freight Quality Partnership, which was launched in April 2003 and consists of a range of

20 partners from both the public and private sector. The objectives of the partnership are:

- to develop an understanding of distribution issues and problems in West London
- to promote constructive sustainable solutions which reconcile the need for access for goods and services, particularly in urban centres and at Heathrow, with local economic, environmental and social concerns
- to promote the role of working practices and structured risk management in freight delivery.

8.78 The Partnership's Action Plan based on the above objectives includes projects covering the following:

- providing an Information System for deliveries
- improved signing for drivers in Park Royal
- local management of delivery bays in Ealing town centre
- providing overnight parking
- priority allocation of road space

alongside the following supporting actions:

- promoting best practice through the FQP website
- maintaining communication with FQP members and the wider freight community on West London freight issues
- advising borough planners on servicing standards in new developments
- assessing opportunities for rail and water-based freight.

Funding

8.79 A key requirement for the sub-region will be to secure funding for the vital improvements necessary to West London's transport network. However, a number of major obstacles will need to be negotiated in order to secure such funding, in particular government funding for significant public transport infrastructure projects is and will continue to me extremely limited, with it being difficult in many cases to meet Treasury value for money criteria. Furthermore, although prudential borrowing will allow additional funding to be raised from private sources, the ability of local authorities to raise the money to repay is extremely constrained. Where funds are available, East London appears to be favoured both nationally and regionally, although in terms of PFI investment in the Underground there is a need to prioritise development in West London.

8.80 Against the above backdrop, there is requirement in West London to develop future actions related to:

- supporting moves to liberalise local/regional government funding to facilitate greater funding and accountability for transport projects at local level
- taking a more pragmatic approach to scheme development looking at private and public transport solutions on their merits/viability
- promoting private sector involvement/ownership (the Government's conversion to Toll Roads provides a precedent here)
- developing and maintaining a list of viable schemes to take advantage of financing opportunities as they emerge (examples of potential opportunities are listed in the Appendix)
- directing the financial proceeds from any future demand management initiatives in West London towards the vital transport improvements required in the sub-region.

Summary

8.81 Some of the key transport related features of the West London economy can be summarised as:

- high productivity sectors
- IT, Finance, Business Services, Logistics, Media, Food, Headquarters
- importance of Heathrow and the motorway network
- integration with Thames Valley
- highly qualified, mobile workforce
- two professional households
- long distance commuting
- not amenable to public transport solutions
- lower paid/unemployed local workforce
- local mobility problems
- significant cross London commuting
- comparatively low population density
- half the density of New York and less than the London Average
- multiple 'B list' centres
- impact on the viability of major infrastructure investment
- poor orbital connections
- transport system focused on Central London
- Heathrow.

Moving Forward

8.82 In order to achieve the aim of establishing a long-term vision and blueprint for West London's transport network there needs to be a full assessment of the current and future weaknesses of, and strains on, the sub-region's transport network, the potential impact of the proposed developments, and the costs and benefits of particular options for intervention.

8.83 As part of this process, and its outputs, West London's stakeholders should seek to make the GLA, LDA and Transport for London as aware possible as to development requirements of the transport network, in order to inform and influence both the Sub-Regional Development Framework and any review of the Mayor's Transport Strategy for London. In this light, it is important that the outcome of the Local Implementation Plans (LIPs) of West London's boroughs are monitored and taken into account.

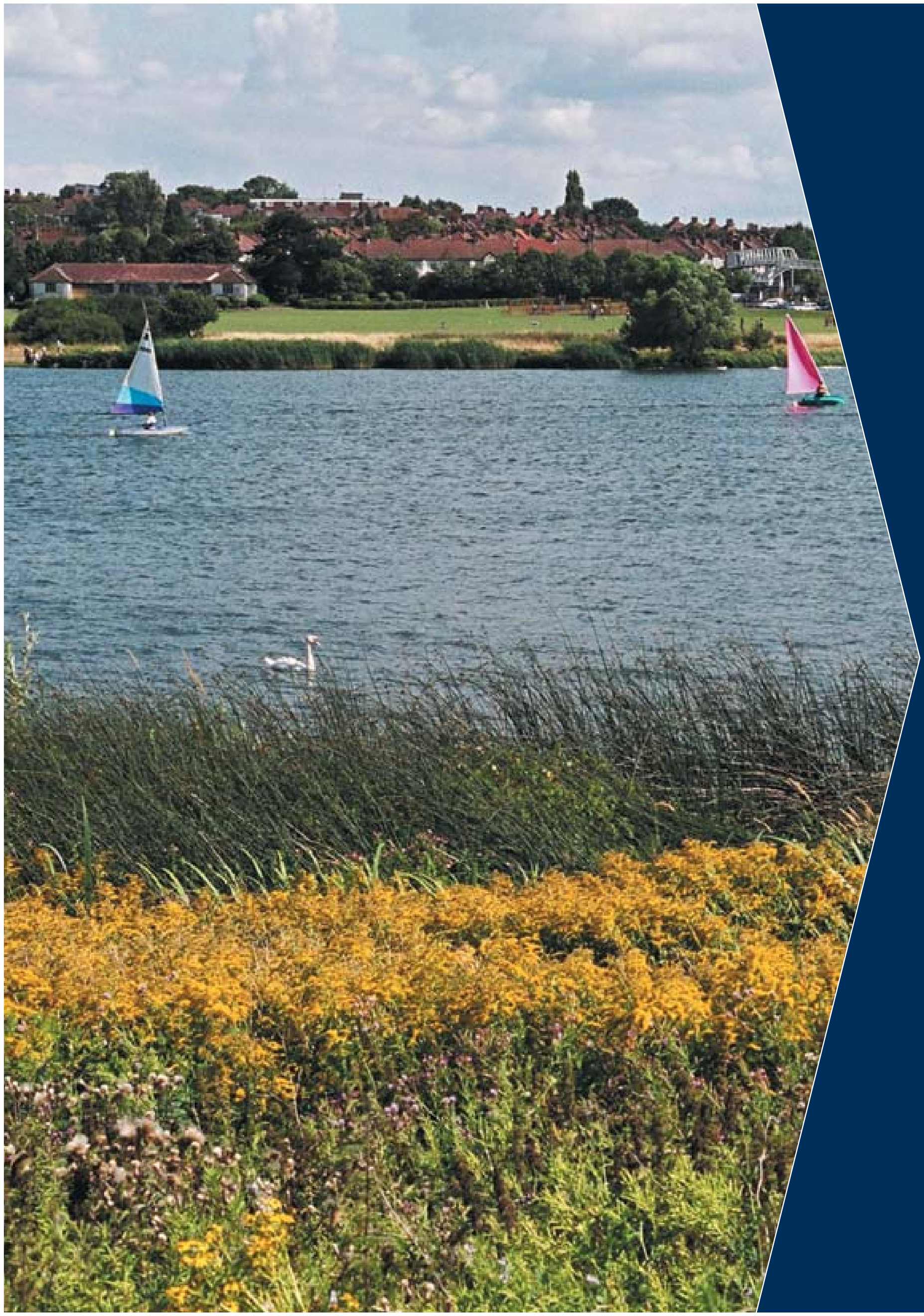
8.84 Primarily, it will be a review of the Mayor's Transport Strategy that will be the mechanism for identifying and making the case for major changes in the development of West London's transport network. A key requirement will be to secure funding for the vital improvements necessary to West London's transport network.

8.4 Objectives and Rationale

Objectives	Rationale
1. Establish a clear vision and blueprint for the future of West London's transport network that is recognised by and influences any review of the Mayor's Transport Strategy for London.	There needs to be a full assessment of the current and future weaknesses of, and strains on, the sub-region's transport network, the potential impact of proposed developments, and the costs and benefits of particular options for intervention. A review of the Mayor's Transport Strategy will be the key means by which West London's stakeholders can influence the development of London's pan and sub-regional transport networks. There is an important role for stakeholders in West London in ensuring that the London Plan is implemented in a manner that is as appropriate as possible to the needs and requirements of West London.
2. Meet or exceed the Mayor's objective of increasing the capacity of public transport by up to 50%, through a design framework appropriate to West London, and improve the integration, reliability, safety, quality, accessibility, frequency and attractiveness of the West London's existing public transport system.	The public transport system in West London is not managing to keep pace with the sub-region's restructuring and overall regeneration, particularly across its suburban centres. Current strategic transport proposals for West London do not fully address the issue of local accessibility to jobs and further transport improvements need to be identified. Within the London Plan there is a priority to improve access to and within town centres and their residential hinterlands by public transport.

3. Improve and expand West London's transport interchange facilities as a mean of strengthening links between radial corridors and addressing 'orbital' and 'orbital-radial' transport provision. These interchanges should initially be identified in conjunction with Transport for London.	From both a social and economic perspective, the transport network plays an important role in attempting to improve the 'permeability' of West London. Links between radial and 'radial-orbital' corridors in West London are weak compared to links within radial corridors. Accessibility across West London should be enhanced to town and other centres, as well as to other intermediate destinations on radial corridors and destinations involving non-radial travel. The London Plan clearly states that good transport interchange facilities contribute significantly to network integration and efficiency.
4. Reduce problems of congestion and parking through interventions based on a cost-benefit analysis of the options for: further development of the road network; managing the demand for access to the road network; and providing alternatives to the road network.	Congestion in West London is severe and without intervention is forecast to worsen further. There is a requirement to assess and fully understand the best means of alleviating the high volume of road traffic in the sub-region without having a detrimental impact on development objectives. For example, there may be cases where new roads are needed to support regeneration, improve the environment, increase safety or provide essential local services. The London Plan is seeking to tackle congestion by reducing traffic growth by a third in outer London, and securing zero growth in outer London town centres by 2011.
5. Ensure that the sub-region's transport network plays a key role in enabling West London to strengthen and fully capture the benefit and impact of economic activity associated with Heathrow Airport and its future growth without degrading the environment further.	The role of Heathrow Airport is vital to the economy of West London, being the single most important generator of travel and employment in the sub-region. At present the full economic benefits of Heathrow Airport are not being maximised by West London, due to high levels of outflow of economic activity to other regions and sub-regions. The London Plan states that West London needs to capture the benefits of key economic generators such as Heathrow for the sub-region's residents, whilst ensuring that this development improves not degrades the environment.

6. Minimise the environmental impact of transport through supporting the West London air quality action plans.	The Mayor's Transport Strategy recognises West London, especially the Heathrow area, as a problem sub-region in terms of air quality. Air quality is a critical issue for the proposed expansion of Heathrow. The West London air quality action plans are engaged in setting the priorities for improving air quality across the sub-region.
7. Minimise the environmental impact of high levels of freight transport by supporting the work of the West London Freight Quality Partnership.	There is a need to ease problems of congestion and pollution – as well communities that have become divided or cut off by extremely busy roads – across West London. This includes reducing the amount of large volume and heavy goods vehicle traffic that currently travels through West London's residential areas and town centres. The West London Freight Quality Partnership is committed to developing sustainable solutions to meet freight problems across West London.
8. Achieve a modal shift to other forms of transport than the car, particularly for short trips.	Alongside further investment in the public transport network, there needs to be further promotion and increased investment in the use of non-motorised travel, in particular continuing to expand the cycling infrastructure and improving conditions for pedestrians. Most journeys in West London are relatively short in distance and could be undertaken on foot or bicycle provided the infrastructure and environmental conditions are appropriate.
9. Promote and support investment in major transport infrastructure improvement through the implementation of the Crossrail Line 1 proposal (and in the longer term the south-west and north-west extensions), the West London Tram and improvements to the West London Line.	Major investment in infrastructure is required to significantly improve the transport network – enhancing accessibility, contributing positively to modal shift, and managing increased passenger growth in the sub-region. Crossrail 1 will have a direct beneficial effect on managing the impact of the growth of Heathrow Airport.



The Environment and Quality of Life

9 The Environment and Quality of Life

9.1 Background

9.1 This Strategy promotes economic growth, an increasingly prosperous and inclusive community and improved business competitiveness in West London. A vital component of the Strategy's success in meeting the aspirations of businesses and residents in West London is that issues of environmental quality and the efficient use of resources are addressed alongside the social and economic dimensions of sustainability.

9.2 A good quality, sustainable environment has positive impacts on business investment decisions and on business competitiveness and is a valuable asset for West London's success. Conversely, poor quality urban environmental conditions, traffic congestion, low air and water quality, excessive noise and waste clearly detract from the potential for economic success. Moreover, they have negative impacts on the residents', employees' and visitors' health and well-being. Some localities in the sub-region have a greater concentration of poor environmental conditions than others and this can lead to an inequality of opportunity for residents and businesses in those localities.

9.3 A good quality of life and a sustainable community is one that is inclusive and provides opportunities for all. The vision for London, as stated by the Joint Chair of the London Sustainable Development Commission, supported by the Mayor, and to which this Strategy subscribes, says, 'Our vision for the 'World Class' London for the future is a place where all Londoners and visitors feel the greatest possible sense of physical, emotional, intellectual and spiritual well-being. Our thinking and decision-making will be long-term, meeting the needs of the present without compromising the ability of future generations to meet their own needs.'

9.4 In considering these issues in this Strategy, our definition of a sustainable quality of life includes a protected natural environment, a healthy and inclusive society, safer streets, a well-connected sub-region, and accessible, high quality local services and cultural amenities.

9.5 Some of the pressures which impact on the quality of life for local people and businesses in West London are illustrated by the environmental indicators shown in table 9.1. Increased economic activity and the related population growth predicted for West London will potentially impact on these and other related indicators and this Strategy, alongside the other key strategies in London and West London which are described elsewhere in this section, should seek to tackle them and promote a better quality of life.

9.6 The planned and promoted growth in economic activity in West London will have impacts on environmental resources and sustainability which are sub-regional, regional, national and global and this issue has to be approached through the inter-relationship between this Strategy and the strategies of regional and national government and be reflected in the environmental policies of the businesses and other organisations undertaking economic activity in the sub-region.

9.7 For businesses and other organisations, the consideration of sustainability and environmental impacts of economic activity provides opportunities for the development of new environmental products and services and this Strategy seeks to encourage innovation, development and growth in this important and expanding sector. The development of strategic planning for sustainability and environmental issues at a sub-regional level in West London is in its early stages, although significant progress is being made over some matters, for instance Air Quality planning. We therefore need to undertake more work on the collection and analysis of relevant data and intelligence on these matters and develop our partnership arrangements to enable further environmental policy and implementation plans.

Table 9.1: Borough statistics 2003

Borough	Dwelling density (no/km)	Overcrowding (% living in overcrowded accommodation)	Crime (Domestic burglaries as a %of adult population)	Per cent green (%)	NO_2 average (ppb)
Brent	2,977.61	6.73	19.07	12.11	21.80
Ealing	2,405.76	5.51	13.11	25.33	21.58
H & F	5,971.42	4.71	17.87	14.72	25.19
Harrow	1,928.37	3.20	11.02	28.40	19.31
Hillingdon	1,342.88	3.26	12.45	44.71	20.92
Hounslow	1,917.76	4.51	14.70	37.91	21.83

Source: Based on Table 3, Valuing Greenness: Green spaces, house prices and Londoner's priorities, 2003

9.2 Strategic Context

9.8 The context for the consideration of sustainability and the quality of life in West London encompasses a broad range of national, regional and local strategies that address the issues of environmental resources and sustainability. These include: the Government's sustainable development strategy '*A Better Quality of Life: a strategy for sustainable development for the UK*' (currently under review); the Mayor for London's strategies and particularly the London Plan, the Economic Development Strategy; the Sustainable Development Framework for London and strategies for air quality, noise, culture, transport, bio-diversity and waste; and local strategies produced by West London Councils, particularly the borough Community Strategies which set out an integrated approach to the promotion of social, economic and environmental well being in their areas.

9.9 This Strategy's principle focus is the economy but it is set firmly in the context of the wider social and environmental issues. A number of these are dealt with in some detail in this Strategy, for instance the strong linkages between transport, especially transport congestion, and economic vitality, health and access. Similarly, this Strategy deals with housing issues, not only as a factor in securing economic growth but also as an issue of social equity. However, in the most part within this Strategy we have considered the economic linkages with the key social and environmental issues and sought to identify positive impacts on sustainability or where there is a prospect of an adverse impact on environmental resources, how this can be avoided, reduce or mitigated.

9.10 However, broadly the success of this Strategy's contribution towards achieving a more sustainable position in West London and improvements to the quality of life will be determined by how well it is informed by and informs the other key strategies and action plans which cover West London and which collectively should address these issues.

9.11 A key contextual document is the Mayor's London Plan. This sets out the strategic spatial framework for the integrated social, economic and environmental development of London for the next 15 to 20 years. Quality of life issues and sustainable development are integral to the aims and objectives of the London Plan, as the Mayor's Introduction to the Plan makes clear.

'*London thus faces a radical challenge, which requires a radical policy response. This should ensure that its rapid expansion of population and jobs within a constrained area maintains and enhances its economic and business efficiency, is accompanied by strong improvements in the quality of life and environment and greater social and economic inclusion. All policies must be inter-related, incorporating sustainable economic and social development, environmental protection and* *enhancement, high quality design and the development of London's culture.*

My vision, which guides all my strategies, is to develop London as an exemplary, sustainable world city, based on three interwoven themes:

- *strong, diverse long term economic growth*
- *social inclusivity to give all Londoners the opportunity to share in London's future success*
- *fundamental improvements in London's environment and use of resources.'*

9.12 The London Plan highlights some of the unsustainable trends that have eroded quality of life in London, namely:

- increased difficulties in travelling around London, with heavy traffic and slow and unreliable journey times
- upward pressure on business costs, made worse by a shortage of appropriate office space, leading to some of the highest office rents in the world
- acute housing shortages resulting in rapidly rising house prices, reducing real living standards, disadvantaging people on modest and low incomes, and creating a destabilising factor in the UK macro economy
- skills gaps in some sectors, alongside social deprivation in many areas and increased economic and social polarisation
- continued social exclusion and discrimination, particularly affecting minority ethnic communities
- increasing pollution, damaged environments and chronic under-investment generally and in particular, in the public realm.

9.13 These problems have been paralleled by a lack of investment in schools and health facilities, by a general growing shortage of skilled workers and rising fears about crime and safety.

9.14 All of these issues have been recognised as areas of concern to be addressed within the West London Economic Development Strategy.

This document has also sought to reflect the Mayor's objectives and the London Plan's Strategic Priorities for West London as they relate to economic development and business competitiveness and the needs of West London's residents.

9.15 The London Plan requires the production of Sub-Regional Development Frameworks (SRDF) for each of London's sub-regions and these are to be completed in draft by the end of 2004 and adopted in 2005. The SRDF will provide an integrated approach to a wide range of social, environmental and economic issues and to the improvement of the quality of life in West London. This Economic Development Strategy will support the development of the West London SRDF and will in turn be informed at its first review by the policies and plans that will be adopted in the SRDF.

9.16 Borough community strategies produced by the West London councils and their local and sub-regional partners will also make an essential contribution to sustainability and environmental quality. They provide an important strategic direction for the local economic activity, inclusion and equity, environmental improvement and management including of the street scene, waste and litter, urban quality and design, heritage and green spaces (with the Local Development Plans), tackling health improvement and inequalities and crime and community safety. Where deprivation is particularly concentrated in geographic areas, local Neighbourhood Renewal Strategies have been drawn up.

9.17 A further context is provided by the '*Sustainable Communities: Building for the Future*' strategy launched by the Deputy Prime Minister on 5 February 2003. The '*Communities Plan*' is a long-term programme of action backed by £22 billion of investment to improve housing and planning in order to build sustainable thriving communities.

9.18 It covers a wide agenda, which recognises that to develop communities in which people wish to live, housing policy needs to be linked to improving economies, public services, transport and the environment at a local level. In particular, the plan aims to:

- increase the provision of high quality and affordable housing in areas of high demand
- further tackle the housing shortage in London and the South East
- regenerate declining communities
- bring all social housing up to a decent standard by 2010 (the Government's guidance on decent home standards is discussed in more detail in the Housing section)
- improve the efficiency of the planning system
- decentralise housing policy and planning by empowering local and regional government
- protect the countryside and improve the local environment.

9.19 A £89 million Liveability Fund is part of a £201 million package of measures to improve the local environment announced in February 2003 as part of the '*Sustainable Communities: Building for the Future*' strategy. In West London the London Borough of Ealing has been selected as a pilot authority for the scheme and its aims are summarised below:

- improved and integrated environmental services for Acton Town Centre, including town centre rangers
- creation of new 'Green Town Square' linking Acton College and South Acton Estate to the town centre
- develop a series of multi-purpose 'pavilions' in Acton parks to provide meeting places, cafes, training and service development spaces
- start one of West London's first 'city car clubs' in Acton and/or Ealing
- programme of other physical improvement schemes, providing better access and facilities in parks, improved pedestrian access to town centre, improved safety (CCTV, street lighting) schemes.

Urban Design

9.20 High quality urban design is important to the business competitiveness of West London and to ensure a good environment for employees, visitors and residents. It is vital in a situation where most of the increase in commercial and industrial building and housing will need to be undertaken within existing urban areas in West London. The London Plan sets out the following design principles for developments, which should also be followed by boroughs. Developments should:

- maximise the potential of sites
- create or enhance the public realm
- provide or enhance the mix of uses
- are accessible, usable and permeable for all users
- are sustainable, durable and adaptable
- are safe for occupants and passers-by
- respect local context, character and communities
- are practical and legible
- are attractive to look at and, where appropriate, inspire, excite and delight
- respect the natural environment
- respect London's built heritage.

9.21 The reclamation and reuse of brownfield sites is recognised as essential to achieving sustainable development by the London Plan and the Draft London Economic Development Strategy although their number is limited in West London, the largest being the Southall Gasworks site which is dealt with in the Land and Property section.

Culture and Sport

9.22 Culture and sport in all its facets is one key area of the London Plan where quality of life and economic growth potential are very closely linked. West London has very important cultural assets including sporting stadiums, theatres, museums, etc., a very large creative industries sector and considerable community-based arts, cultural and sports activity.

9.23 The Mayor's Culture Strategy argues that: 'A better balance between facilities at the centre and the outer regions is needed. More local cultural provision in the town centres will reduce the need for people to travel. At a sub-regional level, there is a need for greater coordination to ensure that those many residents who do not use facilities within borough boundaries are catered for. There are opportunities, for example, to add larger scale facilities, such as theatres, museums and arts centres that serve the residents of several boroughs.'

9.24 One of the priorities set out by the Mayor is to: 'Facilitate strategic partnerships to maximise growth of cultural provision through the London Plan Sub-Regional Development Frameworks particularly in outer London, opportunity areas and strategic cultural areas.'

9.25 Sport is included within the definition of culture for the purposes of the Culture Strategy. According to the Mayor's Culture Strategy: 'Participation in sport will be promoted to Londoners, improving health and well being.' The London Plan for Sport and Physical activity seeks to promote increased participation in sport and sporting excellence. It proposes that the development and management of sports programmes be undertaken at a sub-regional level.

9.26 Major culture, creative and cultural developments are taking place at White City, Ealing Studios and Wembley in West London. Wembley is the largest development and the one with the greatest impact. The objectives for the Wembley Stadium are:

- to ensure that London has a quality national stadium capable of staging major world events such as the World Cup or European Championships
- to ensure that London's cultural infrastructure is comprehensive and appropriate to a world city
- to regenerate Wembley, one of the most deprived communities in the whole country, ensuring that the residents of Brent enjoy the benefits of the regeneration through the provision of a major cultural facility
- to boost the economy of North-West London through the creation of new jobs and other benefits
- to ensure that an adequate transport infrastructure is in place, making most efficient use of public transport
- to ensure that London gains from the broader benefits of the national stadium in terms of hotel accommodation, hospitality and other services.

Business and Employer Contributions to Sustainability

9.27 The Draft London Economic Development Strategy provides an important underpinning context for the development of new environmental industries and services and has targets which the West London Strategy can contribute to for the creation for new employment in the environmental and green technology industries.

9.28 The Draft London Economic Development Strategy also recognises the benefits that can accrue to this sector and to the environment through the purchasing policies and power of the businesses and the public sectors. The Mayor's Green Procurement Code, the development of public sector green purchasing policies and the adoption by businesses of environmental management systems which incorporate green purchasing are relevant to this Strategy and its objectives.

9.29 The adoption by businesses and other employers of environmental policies and environmental management schemes (EMS) is also important to assist them in reducing their environmental impacts, improving their competitiveness and reducing costs. In West London there are a number of programmes and agencies, Groundwork for example, that support businesses to adopt EMS and improve their environmental performance. The EU Objective 2 strategy for part of West London also promotes business environmental improvement.

9.30 The quality of the physical environment of employment areas is important in securing and retaining business investment in the sub-region and poor physical environments can damage businesses' competitiveness through inefficiencies of operation and by deterring potential customers and employees. The importance of good quality design and environmental management and maintenance, including of waste, the street scene, traffic, crime and safety, and employment areas, are underlined in the Draft London Economic Development Strategy, the EU Objective 2 strategy for part of West London and in the London Plan. Local councils are addressing these issues through local plans in the context of their community strategies and they are also being addressed through local partnership action. For instance Park Royal Partnership has been very active in working with businesses and local agencies in schemes to improve the physical environment of industrial areas in Park Royal. Works have included, for example, tree planting, public squares and enhancements to public areas in general, lighting and pedestrian links, as well as the betterment of the canal.

9.31 Business Improvement Districts (BIDs) also have a potential role in businesses engaging in enhancing their environment and the local councils and businesses, together with Town Centre Managers and local partnerships have been developing proposals for BIDs in, for instance, Hammersmith & Fulham and Ealing.

9.32 Businesses can also make a significant contribution to social inclusion and equalities through working in partnership with local communities. Encouragement to businesses to develop Corporate Social Responsibility programmes is being strategically driven in some areas of West London, for instance by Park Royal Partnership.

Crime and Community Safety

9.33 Concerns about crime and community safety normally rank top in any survey of residents' opinions about the area they live in. Crime has a major impact upon people's quality of life, including their health, and on business confidence and competitiveness and their ability to recruit and retain staff. Crime rates in West London, in all categories of offending, are higher than elsewhere in England and Wales although lower than in some parts of London. The strategic context for community safety is the Metropolitan Police Authority Policing Plan and the borough Crime Reduction Strategies produced by the Crime Reduction Partnerships. These borough strategies are being reviewed and updated at this time.

9.34 This Strategy can contribute to crime reduction and community safety through the promotion of good quality urban design and management, particularly of business areas, and by businesses and employers, through Corporate Social Responsibility approaches, supporting community initiatives to reduce crime and offending.

Community and Voluntary Sector

9.35 A vibrant and well-resourced community and voluntary sector and engaged and active citizens are important to ensuring a good quality of life, as recognised in the Draft London Economic Development Strategy. In West London the West London Network brings together the councils for voluntary service in the six boroughs. The councils support and help develop a wide range of voluntary and community groups in West London and a very significant amount of volunteering by individuals. Voluntary and community groups are important deliverers of services and are frequently innovative and close to local people and their needs. They are often very effective in reaching out to the most marginalised and excluded members of the community and helping them to access services and participate in employment and training. In many deprived areas in West London, where there is a lack of community capacity, Neighbourhood Renewal Strategies provide capacity building support to the sector. In addition, local councils, grant-giving trusts, government departments and lottery funds provide support to the sector, as do businesses through their CSR programmes.

9.36 Social enterprises have an important role to play in regeneration and economic development and in their contribution to the quality of life. Their importance is recognised by the LDA's Social Enterprise Business Support Strategy for London, the EU Objective 2 strategy for part of West London and borough economic development strategies.

Sustainability Appraisal

9.37 This Strategy has been appraised in terms of its contribution to the quality of life and sustainable development in West London. This appraisal used the London Sustainable Development Framework as its basis. The lessons from this process were used to inform the production of this edition of the Strategy and its objectives and will be used further during the development of implementation plans.

9.3 Key Issues

9.38 West London possesses many high quality assets in terms of quality of life for both residents and visitors. However, in common with the rest of London and the country, it faces the challenge of how to grasp the social and economic opportunities that arise from economic activity and growth whilst protecting and enhancing environmental assets and raising the quality of life for residents, employees and visitors. This Strategy recognises that quality of life and sustainable development are central to addressing its vision and the strategic priorities for West London identified in the London Plan.

9.39 The key issues, which are fundamental to the successful delivery of a good quality of life and sustainable development for West London, include:

- improving public transport links and reducing the use of private vehicles within and to and from the sub-region
- addressing the level of crime and issues of safety in the sub-region
- improving air quality, especially areas close to transport hubs and major roads
- reducing noise pollution – again closely linked to the location and intensity of transportation
- conservation and pro-active management of the sub-region's natural and historic assets for the benefit of local residents and visitors
- promoting good quality urban design and management and the regeneration of derelict land
- tackling crime and the fear of crime
- regeneration and protection of environmental assets that are under-utilised or under threat, such as canals and waterways and the Green Belt and areas on the urban fringe, and the improvement of open space for leisure and recreation.

9.40 Key issues such as housing and skills and aspects of land and property, noise and air pollution are dealt with in other chapters of this Strategy and diversity and equality issues are addressed throughout the document.

9.41 In addition to addressing the key issues, major opportunities to promote an improved quality of life include:

- building on our cultural, creative and sporting assets by improving our strategic management and co-operation between stakeholders and by encouraging new investment and economic and community activity – in this context the cultural diversity of our community in West London is a particular strength upon which we can build

- developing the strength and potential of voluntary and community groups and social enterprises in the sub-region and using this resource to assist in the delivery of key aspects of the Economic Development Strategy including skills development, community capacity building, quality of the urban environment, green and open space improvement and management, biodiversity, etc

- promoting increased adoption by businesses in the sub-region and other employers of environmental management systems and good environmental practice (including green travel plans – see transport chapter), green procurement policies and business take-up of Corporate Social Responsibility polices and activities

- developing opportunities, through partnership activity wherever possible, to improve the public realm of town centres and employment locations in West London, including through the process of commercial and industrial and housing development

- promoting good quality urban and architectural design and the adoption of green building practices and materials

- supporting and encouraging environmental business product and service innovation and the growth of the environmental business sector.

9.42 As this chapter demonstrates, in considering how to best address sustainability and the protection and enhancement of environmental assets in West London, it is important to take a very broad view of the social, economic and environmental factors involved and set objectives in a rounded and well co-ordinated manner.

9.43 To achieve this requires, firstly, the good availability of data and intelligence on all the key factors and issues affecting sustainability and the environment. Preparation of this Strategy has revealed that in many cases this data and intelligence is not easily available at a West London level, either because it is not currently collected or because it is stored at a different spatial level than the sub-region, for instance health and crime data. The ready availability of relevant data is also important in order to be able to monitor and evaluate sustainability trends and the extent to which objectives are being met.

9.44 Secondly, the preparation of this Strategy has shown that there are many thematic strategies and initiatives, at borough or at sub-regional level, that have as their objective tackling issues concerned with sustainability and the protection and enhancement of environmental assets, for instance the West London Transport Strategy, the Air Quality

Action Plan and the Housing Strategy, borough Community Strategies and Crime Reduction Strategies, etc.

9.45 The formulation of this Strategy and the production of the Sub-Regional Development Framework for West London will have the benefit of providing a better co-ordinated approach to these issues and will have positive impacts on them. However, it is clear that there is still more work to be done on building up a clear picture of how we tackle sustainability and the environment in West London and the communications, partnership and consultative arrangements necessary to achieve this.

End Notes

Business Improvement Districts

9.46 A business improvement district (BID) is a partnership arrangement through which local authorities and the business community can take forward local improvement schemes, which could include projects such as CCTV, rapid responses to graffiti and litter, better local training, improved transport services and tourism promotion. These schemes have to be agreed by local business ratepayers through a formal voting process. Business ratepayers contribute an additional levy on their business rate bill to finance a BID.

EU Objective 2 Programme for West London

9.47 Objective 2 is a European Funding Programme targeting areas in need of industrial restructuring and affected by urban decay. In London, within those areas eligible for this overall EU programme there is an Objective 2 Programme strategy. Its aim is to redress the imbalance in London's economy by tackling barriers to economic opportunity in key areas suffering industrial decline, urban deprivation, low economic activity and social exclusion so that new, sustainable opportunities are open to all people living and working in the Objective 2 area.

9.48 In West London this London programme covers seven eligible wards in the boroughs of Brent, Ealing, and Hammersmith & Fulham. A West London Objective 2 partnership has been set up to manage the sub-regional programme and has produced a strategy for the use of the funds.

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9.4 Objectives and Rationale

Objectives	Rationale
1. Invest in sustainable business communities and encourage businesses to play a greater role in the management, maintenance and improvement of their business neighbourhoods, for example through the Business Improvement District pilot areas.	To both attract new companies and retain those that have already invested in West London. Create more sustainable business communities, that are vibrant, healthy and safe, that respect the environment and where individuals and businesses prosper.
2. Support businesses and other employers to improve their environmental management systems, including assisting them to achieve environmental standards such as ISO 14001, and encourage the adoption of Corporate Social Responsibility (CSR) policies by businesses.	To reduce and minimise their adverse impacts on the environment. CSR polices complement the environmental responsibilities of businesses by engaging them in activities which address broad sustainability issues within their local communities.
3. Ensure high quality landscape / design of future housing and employment site developments. Specifications for designs should include the need to consume resources more efficiently, minimise and recycle waste and improve energy efficiency.	Need to ensure sustainability of investment in business and housing infrastructure (see Land and Property and Housing sections).
4. Support boroughs to produce strategies which aim to provide quality and accessible green space and promote schemes for the regeneration and protection of environmental assets that are under-utilised or under threat, such as canals and waterways and the Green Belt and areas on the urban fringe.	The availability of green open space for leisure and recreation and as a contribution to bio-diversity is a key factor affecting quality of life and choice of people living and working in an area. Green space can help offset some of the potential adverse impacts of high

	levels of population density and the need for people to travel far afield to visit and benefit from such amenities. A well preserved quality built heritage, good quality environmental assets and a healthy bio-diversity are valued by residents, employees and businesses and create an environment which is more attractive for businesses to invest in.
5. Build the capacity of the voluntary and community sector and community enterprises, particularly where they contribute to the sustainability and environmental improvement objectives of this Strategy, and encourage volunteering and active citizenship and participation.	Active and engaged citizens and a capable voluntary and community sector are important elements of a good quality of life and can contribute to the environmental, economic and social objectives of this Strategy, particularly supporting initiatives which seek to reach disadvantaged and hard to reach groups and individuals.

Northwood
Harefield
Ruislip
South Ruislip
Uxbridge
Northolt Airfield
Northolt
HILLINGDON
Brunel University
Hayes
Stockley Park
West Drayton
London Heathrow Airport
Pinner
Rayners Lane
Stanmore
HARROW
Harrow
Waverley Industrial Estate
Kenton
University of Westminster
Colindale Business Park
European Business Centre
Connaught Business Centre
JVC Business Park
Staples Corner Business Park
Hendon
Wembley
BRENT
Willesden
Greenford Industrial Estate
Perivale Industrial Park
Perivale
Greenford
Park Royal Business Centre
Park Royal
EALING
Ealing
Southall
Acton
Middlesex Business Centre
Great Western Industrial Park
Ealing Studios
Thames Valley University
Western International Market
HAMMERSMITH & FULHAM
Hammersmith
Chiswick
Kensington
Earls Court
Paddington
Fulham
Putney
West Cross Centre
Heston
HOUNSLOW
Hounslow
Central Park Estate
Twickenham Trading Estate
Twickenham
Richmond
Feltham
Bedfont Lakes
Hanworth Trading Estate
To The North
M1
M4
A40
A4

Branding

10 Branding

10.1 Background

10.1 In developing the sub-regional Economic Development Strategy, the West London Partnership has identified branding as one of seven major headings of the Economic Development Strategy framework. This reflects the acknowledgement of branding as a significant tool to be used in response to the global and highly competitive environment that West London operates within. Being an integral part of the Economic Development Strategy also reflects an enlightened view that branding has a role to play not only in relation to global competition for inward investment, but also in response to the political focus shifting east to the Thames Gateway region, and the perceived success of Thames Gateway in capturing significant regeneration attention.

10.2 At least as important as the external face of West London are internal perceptions of the area and the wide variety of practical ways in which branding can support co-ordinated and consistent messages and activity between different organisations, people and places within the area.

10.3 West London has found itself needing to raise its voice with a consistent message both to the outside world and the diverse people and places within it. The initial stages of work to develop branding for West London are concerned with putting in place an accurate understanding of West London as a basis for robust foundations to establish the components of a complete brand that will have a clear and useful function in the overall development of the sub-region.

10.2 Strategic Context

10.4 Branding is increasingly recognised as part of the development and communication not just of products, services and organisations in business, but also of the public sector and the public realm. The 'Glasgow's miles better' campaign raised the profile and awareness of Glasgow as a city undergoing transformation. Liverpool's successful capital of culture bid integrated a wide range of city interests to present a strongly unified message to the judging panel. In turn, the city as a whole has added impetus and enthusiasm for regeneration: £15 billion inward funding is identified with 14,000 new jobs anticipated in the cultural sector alone. Prior to the Olympics, Sydney was already a successful city but the highly organised approach with a defined 'look and feel' for all aspects of the games has significantly enhanced Sydney's global image.

10.5 In London the GLA and Visit London have implemented a high profile campaign for visitor attractions under the Totally London brand identity. A completely different type of success is the high profile that Thames Gateway has achieved in the regeneration sector. The 2012 Olympic bidding process is raising the profile of London and regeneration in the east of the city, and is identified by a widely publicised brand identity for the bidding process.

10.6 The Draft London Economic Development Strategy (‘*Sustaining Success’*) recognises the importance of marketing and promotion and also dedicates a framework heading for the subject. But the London examples identified above highlight one of the significant contextual challenges for West London. There are many potentially conflicting messages and activities associated with promoting London. Therefore the branding for West London must acknowledge the complexity of this context and develop a branding platform that not only promotes the distinctive qualities of the region to the range of relevant audiences, but also does this in a way that is individually distinctive and/or beneficially collaborative amongst the complete range of brands in London, both nationally and internationally. Explicitly stated, the development of a brand for West London must take into account the current pan-London branding structures already in place (London Unlimited, London First Centre etc) and look to complement these brands rather than compete. One of the goals of the project will be to identify how a West London brand will sit within the 'Russian Dolls' of current branding initiatives.

10.7 As a professional discipline that incorporates marketing and communications, there are a number of good working practices and processes that need to be put in place in order to fully contribute to achieving West London’s vision.

- **Connection** – The most effective branding, for example Virgin or Orange, or the Sydney Olympics in the public realm, has very strong co-ordination between all aspects of the organisation’s activity and ‘touch points’. This is achieved through consistent use of messages and images and shared values and qualities.

- **Audience analysis** – Understanding and segmenting audiences, both internally and externally. In the West London context the spectrum of audiences is very wide. It is unlikely that one universal message or brand identity can accurately target everyone.

- **Understanding West London** – All effective branding must be based on truths. Brands that fail to deliver fail. Virgin trains received considerable criticism in the early days of their franchise, partly because of the high expectation of quality of service. Ultimately the strength of the underlying brand values has helped Virgin focus on developing and improving their service. In West London the underlying qualities must be fully explored and understood and effectively coupled to an aspirational framework for development.

- **Function and use** – London is communicated and promoted by many overlapping brands (identified as an issue in '*Sustaining Success*'). There is a lack of clarity of how individual brands work to achieve aims, how they are used and by whom. In the public realm the function and use of brands that represent places is often much more complex than with a brand representing a private company, product or service. There are a number of factors to this complexity including the need for consensus amongst stakeholders, overlapping functions of organisations and multiple objectives. The effective resolution of how a brand for West London functions and is used in relation to a wide range of related brands is a key challenge, but also an opportunity to introduce clarity and consistency.

- **Distinctiveness** – Ultimately the overall distinctiveness or distinctive qualities of West London must be drawn out and clearly and powerfully communicated. The distinctiveness must be true, and to achieve its goals must stand the test of challenging competition.

Initial consultation

10.8 To further examine the context specifically in relation to branding in West London an in-depth consultation exercise was undertaken. This exercise was conducted with a number of key stakeholders in the West London economy within the public, voluntary and private sectors.

The consultation exercise followed a format of face-to-face in-depth interviews with open questions relating to the perceived need for a brand, the understanding of West London as an area, a SWOT analysis and exploration of other key issues that impact on West London branding. The key findings of the research are highlighted below.

10.9 **Business strengths / uniqueness overview:**

- access to markets is unparalleled – into London, the motorway network to the rest of the UK and Heathrow-International
- better cluster developments in growing industries: media, creative, food manufacture, transport/logistics, HQ
- good access creates a great catchment area for skills and people
- proven commercial success combined with an established social infrastructure
- global perspective, social/racial diversity
- the successful integration of business, public and community sectors through WLP and other partnership arrangements.

10.10 Social strengths/uniqueness overview: The social strengths are not as easily recognised as the commercial strengths… more anonymous, less well defined and they are countered by areas of significant deprivation and a shortfall of 'premier league' cultural and shopping destinations, but:

- good employment prospects
- the benefit of better than average communication links in and out of town
- great sporting arenas
- access to the whole world from your back yard – integrated, diverse, inspiring, exciting – a buzz
- broad range of housing (but lacking enough affordable housing).

10.11 **Summary of interview findings:**

- the stakeholders interviewed express a clear need and desire to build a brand… in tandem with the LDA but distinct and competitive in a sub-regional sense
- views on the priority issues that branding can tackle vary slightly
- branding can be used as part of a defensive move against Thames Gateway, to lobby for public investment
- branding is vital for helping the public sector realise the linked need of supporting business success (a vital regional and national resource) with support for socially deprived communities
- the need to define the whole area as a desirable residential and business destination, for private investment
- there were opposing thoughts on public investment; either lobby harder for a fairer share or, alternatively, West London can demonstrate the role of private investment to lead public sector investment
- unanimous agreement about the positive cultural diversity of the area
- and the divide between success and deprivation
- the area is defined by its transport links
- London is a brand in its own right; this should be leveraged but a positive relationship needs to be established between a brand for West London and all the pan- London and regional brands that it will work alongside
- transport investment for the region is key but who should initiate development?

10.12 In summary, the big challenge is to develop a brand that celebrates the successes but simultaneously leaves room for the problems to be seen, heard and dealt with.

10.3 Key Issues

Positive brand interrelationships

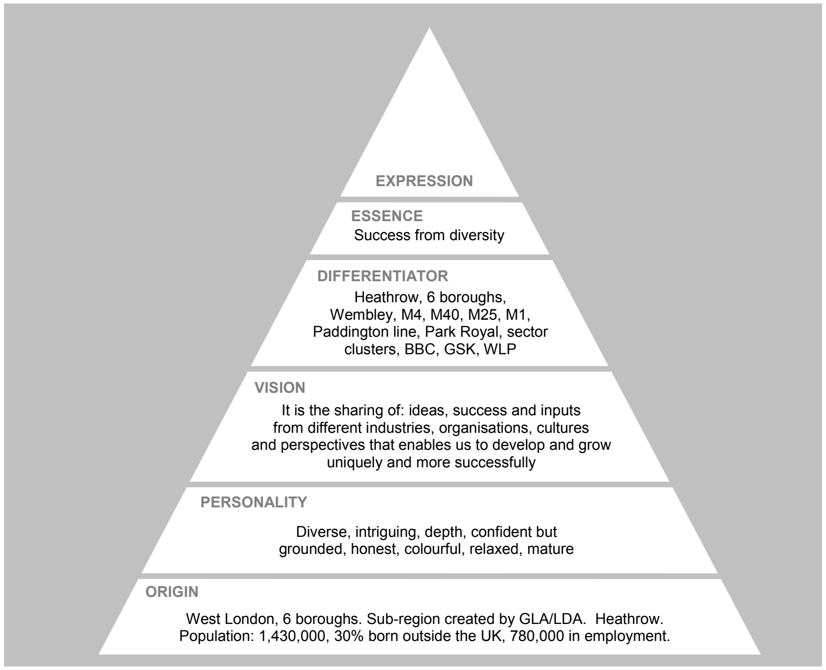
10.13 A study of the operational context for a West London brand reveals a complex map of public sector brands, many of which have a direct interest in West London, and likewise West London has a vested interest in a large number of both regional and pan-London organisations and their activities. A West London brand will not supplant these existing brands. In order for it to effectively support the strategic objectives for the area it must develop in a way that will both create a distinctive voice for West London and work in harmony with existing brands, reinforcing and enhancing the work of others. The brand will not be 'owned' in a conventional commercial sense and its use and application cannot always be dictated as strongly as a commercial brand. A wide variety of organisations will use it because they see the potential added value. If this shared sense of ownership is not achieved, any specific branded devices will be quickly devalued.

10.14 Therefore the process for developing the brand must be sensitive to these issues and work to achieve high levels of buy-in from related organisations, and be able to make a strong and coherent case for a new brand.

Internal and External focus

10.15 Brands are often associated with private business and with consumer markets. Branded approaches are increasingly being used in the public sector and in the public realm, however there is still a strong association with consumers and private business. In the West London context, perhaps the most obvious application for branding is as part of marketing communication to support inward investment activity, adding value to a strong business focus to consumer aware organisations. This is only part of the picture, but the perception of branding can easily be stereotyped in this way. By including branding as a significant component of the Economic Development Strategy, West London is signalling a far broader role (which is mirrored in the work of the LDA and other regeneration organisations). In addition to external applications such as marketing communications for inward investment, tourism and transport, the internal applications and potential benefits are at least as important. For example, helping to develop a common understanding of the area's human and cultural resources, or championing community involvement in the 2012 Olympic bid. The brand development process, therefore, needs to counter a narrow view of the role of branding and be very clear about potential applications and benefits internally as well as externally.

Potential brand model diagram



Developing the Brand

10.16 We cannot change where we are from, nor in the short-term our physical attributes, but we can be more confident in who we are and why businesses should locate here and why people will enjoy living here. Businesses do work and prosper in West London – we are a proven success story. Different ethnic groups also work and live successfully side by side and contribute to the evolving, dynamic face of West London. This outward looking, global perspective of a diverse community directly contributes to the development of business within the sub-region.

10.17 It is this link between diversity and success that we can potentially celebrate from both an industry and social perspective. But this is predominantly a West London stakeholder view.

10.18 We need to deconstruct our potential brand and research with a range of audiences, internal and external, to understand if our claims are believable, different and compelling. This is the end of an initial phase of exploratory work and the beginning of an enlightening phase of work which will seek to bring our brand to life visually, thus enabling a broader range of audiences and interviewees to respond emotionally, as well as rationally, to a potential new vision/direction.

10.19 Five brand themes have been identified which start to capture the key qualities of West London. Each theme has been explored as an introductory paragraph and images, graphics and words that aim to bring the themes to life, develop the distinctiveness of West London and to make an intuitive connection with people. The brand themes are:

- diversity
- success
- access
- partnership
- assets.

10.20 All of these brand themes represent truths about West London. We are not trying to pick a winner, we are developing and understanding how our new brand can function most effectively. What is the hierarchy of appeal; primary, secondary, tertiary, etc? How are people responding emotionally to the visual stimulus? How far can we go with colour palette, typography, photography, iconography, tone of voice, etc?

10.21 The themes also represent the DNA of West London and are at the core of the vision, working as cross cutting themes for all the Economic Development Strategy framework headings.

10.4 Objectives and Rationale

Objective	Rationale
1. **Raising awareness** – For West London to be widely recognised amongst internal and external audiences as distinctive in London, the UK and globally, with positive association of the identified brand themes as a means to drive better economic performance and perceptions of the area/quality of life.	Significant elements of West London, such as Heathrow, have a very high global profile. This highlights the narrow perceptions that can be formed of the region as a whole. A broader, balanced and distinctive profile will be important in the context of increasing competition.
2. **Re-orientating the business model** – For West London to clearly communicate to public and private sector audiences the link between continued success and the need for strategic investment to overcome social issues including deficits in learning and skills, lack of affordable housing and pockets of deprivation.	It has been established that West London is a significant net contributor to the UK economy. But there is an argument that needs to be consistently and forcefully made for investment in ongoing and future success. Particularly through investment in human and physical infrastructure. Branding will play an important role in furthering this argument.
3. **Influencing consumers** – For West London to be widely recognised as an attractive place to live, work and participate in cultural and leisure activity. Not just for existing high profile places such as Wembley for sport or Chiswick for upmarket living, but a much wider spectrum of places that reflect the diversity and assets of the area that are often hidden.	The ongoing economic development of West London requires the whole region, including a number of currently under-valued physical and social assets, to have a positive profile as a place to live, work and play. Branding has a key role in the marketing and promotion of the region and individual assets, either as the lead brand or as an endorsement brand.

4. **Clarifying and unifying** – For West London stakeholders to have a clear and consistent understanding of the sub-region's qualities and vision. For this understanding to be underpinned by a variety of initiatives that will support this shared understanding and sense of purpose for the area. To capitalise on the effective partnership working in the region.	One of the identified strengths of West London is the effectiveness of its partnerships. This can be further strengthened by measures that will enable all the stakeholders to communicate common West London goals and vision, either individually or collectively and with power and consistency. This can be achieved through a wide variety of practical devices, from printed collateral to one to one meetings.
7. **Brand communication 2** – Development of brand marketing and communications strategy and implementation plans.	Marketing and communications planning and implementation should be carried out with the brand values, and the overall economic and social goals at the core of all activity.

Appendix

11 Appendix

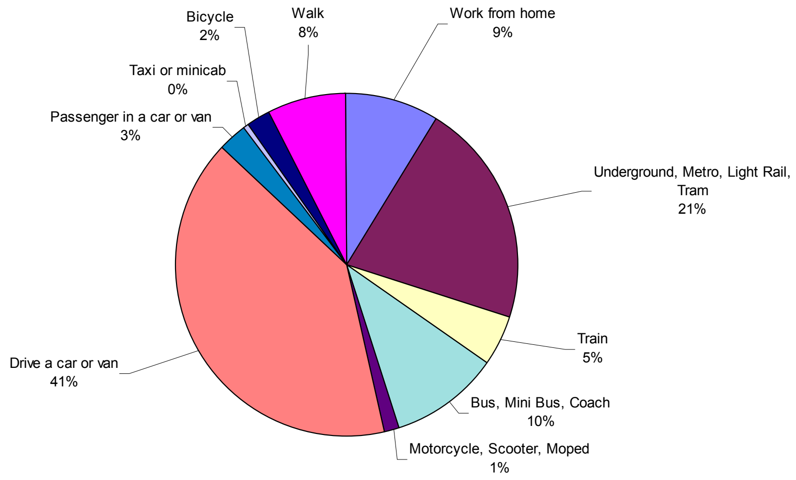
Appendix A: Summary of Transport Data for West London

As a means of outlining and addressing some of the key issues and challenges facing the West London transport network it is useful to initially summarise some of the key statistical data on travel patterns and modes in West London. This section of the chapter draws on the most recent transport and travel data and findings provided by Transport for London (TfL), which is primarily based on an analysis of census and Railplan data.

Figure 11.1 shows a breakdown of journeys to work by main mode for people living in West London (Census, 2001), with approximately 4 in 10 people using public transport and a similar proportion travelling by private car/ van. There are a number of key comparisons with London-wide data.

- A far higher proportion (40%) of residents drive to work in West London compared with the London-wide proportion (34%).
- 21% of West London's residents travel by Underground, metro, light rail or tram, higher than London-wide (19%).
- 5% of West London's residents travel to work by National Rail, less than London-wide (12%).
- 10% of West London's residents use the bus, similar to London-wide (11%).
- Of the remainder, 7% walk, 9% work from home and 2% cycle to work.

Figure 11.1: Main Mode for Journeys to Work by Employed Residents of West London



Railplan data for 2001 indicates the various public transport modes used in West London covering journeys originating or terminating in the sub-region and through journeys. This data indicates:

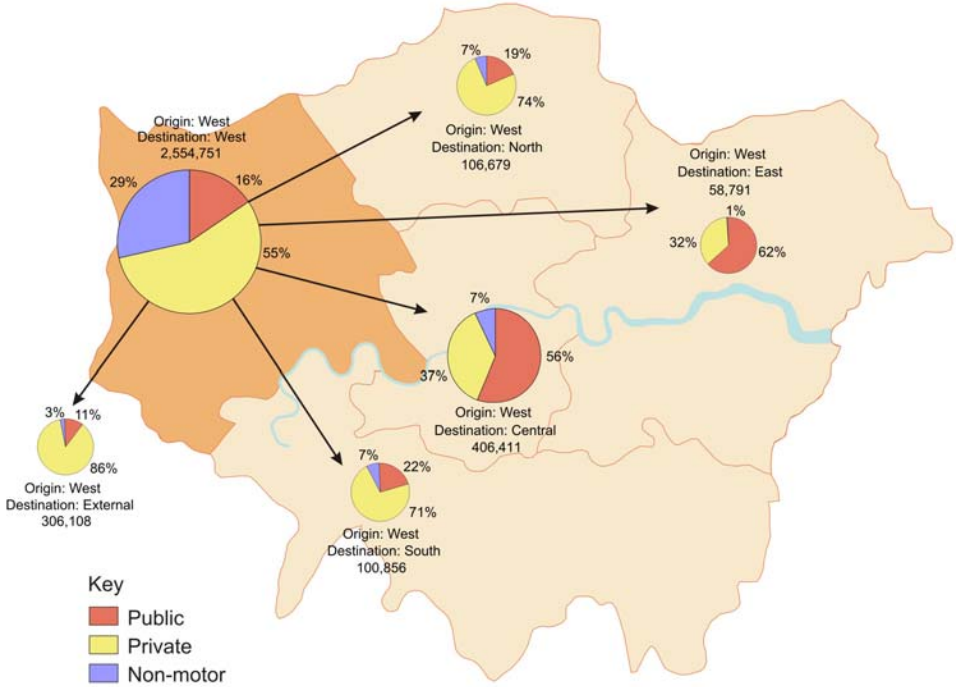
- 49% of all public transport journeys in the sub-region are by National Rail, slightly less than London-wide (56%)
- the Underground has the second largest share of public transport journeys at 38%, higher than London-wide (28%)
- bus usage at 13% is lower than either National Rail or the Underground patronage in the sub-region, but similar to bus usage London-wide (14%).

Weekday travel patterns in West London are shown by Figure 10.2. Based on LATS data, this shows the overall travel patterns in the sub-region, distinguished by public, private and walk/cycle. Trips originating in West London to other sub-regions and trips to areas outside London are shown. Key findings are:

- 72% of all originating trips are made wholly within the sub-region
- 55% of these are made by car
- the second largest share of trips is to Central London
- the third largest share is to areas outside London.

Overall, public transport accounts for 56% of the trips made to Central London, compared to only 16% of trips within West London. This highlights the dominance of radial public transport into Central London, especially for work, as well as the relatively small role currently played by public transport for other trip categories in suburban West London.

Figure 11.2: Weekday Travel Patterns in West London



Source: LATS data (TfL)
Reverse flows are assumed as equal over a full 24-hour day

Table 11.1 shows trips originating in West London classified by the main mode of transport. It shows all trips taking place on a weekday based on the 1991 LATS survey. The daily mode share patterns are shown, together with the percentage of trips for work and the percentage taking place in the peak periods, with every interchange being taken as defining a new stage of the journey. Key findings are:

- 29% of daily trips in the sub-region are for work, of which 47% are made in the peak period
- 63% of daily rail trips are for work, of which 71% are made in the peak period
- 58% of daily Underground/DLR trips are for work, of which 65% are made in the peak period
- 27% of daily bus trips are for work, of which 46% are made in the peak period
- 26% of walking trips are for work, of which 47% are made in the peak period.

Table 11.1: Travel in West London - Trips by Origin in the Sub-Region

Main mode of transport	Daily trips Million	% for work	% of work trips in peak period
Underground (including DLR)	0.29	58%	65%
National Rail	0.05	63%	71%
Bus	0.30	27%	46%
Walk	1.34	26%	47%
Car/motorcycle	2.01	26%	44%
Bicycle	0.06	37%	47%
Taxi	0.02	23%	43%
Total	4.07	29%	47%

Source: Underground, rail, car/motorcycle, taxi - 1991 LATS Combined trips files
Bus, walk, bicycle - LATS 1991 Household survey (London residents)
'Peak period' includes both morning (7-10am) and evening (4-7pm) peaks

In terms of public transport trips originating in West London over a weekday, for both internal trips within the sub-region and external trips (to other sub-regions and areas outside London) the LATS data finds that:

- internal (i.e. within the West sub-region) weekday public transport trips are estimated as 397,569, over half (54%) of all trips
- there is considerable movement from West London to the central sub-region, with 228,208 weekday trips taking place (31%)
- there is also significant movement to the east sub-region, with 36,667 trips from West London to the east sub-region (5%).

For all weekday private transport trips originating from West London, a total of 71% (source: LRTS data from TfL) are for destinations within the sub-region, followed by 13% for destinations outside of London. For all weekday private transport trips originating in London, 19% are destined for West London, with only East London (22%) and South London (20%) having a higher number of destined trips. However, if weekday private transport trips from outside London were included it is likely that West London would have the highest proportion of destined trips.

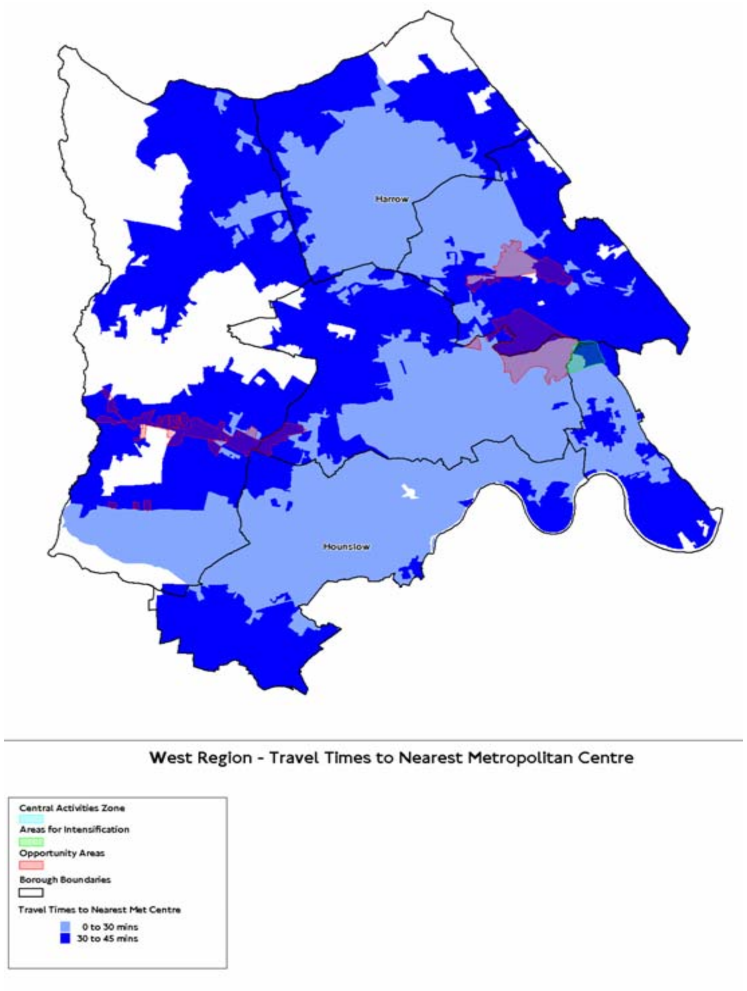
In respect of the current accessibility to West London's public transport system, Transport for London's data indicates that although the inner parts of West London have relatively good accessibility to public transport, the outer three boroughs have relatively poor accessibility, with the exception of the main centres of Harrow, Hounslow, and Uxbridge. Public transport plays a relatively small role in providing for local travel within the sub-region, while the rate of car trip generation is at a high level, second only to South London.

Figures 11.3 to 11.5 highlight the levels of public transport accessibility in West London. As shown by Figure 10.3, the metropolitan centres – Ealing, Harrow and Hounslow – all have large catchment areas within 30 minutes travel time. Most of the sub-region falls within a 45 minute journey time, with the exception of the western extremes of Hillingdon and the northern tip of Harrow. The main opportunity areas are more than 30 minutes from a metropolitan centre. The innermost areas at Willesden and Wembley are relatively well served with access to Central London, but the area west of Southall is mostly more than 30 minutes from a centre of metropolitan status. The large areas to the west and north west of the sub-region that are more than 45 minutes from a metropolitan centre are mostly areas with very low density development, or are undeveloped.

Figure 11.4 illustrates the areas of West London within 30 minutes travel time of the major centres, using public transport. Wembley, Southall, Uxbridge and Chiswick have large catchment areas. There are many major centres grouped together in the south east of the sub-region, and such a close proximity has an effect on their individual catchment areas. Large parts of the boroughs of Hillingdon and Hounslow are outside the 30 minute catchment. Parts of the borough of Ealing are also relatively distant from a major or metropolitan centre. Again, the areas with poorer access to centres are partly explained by areas of undeveloped land or low density development.

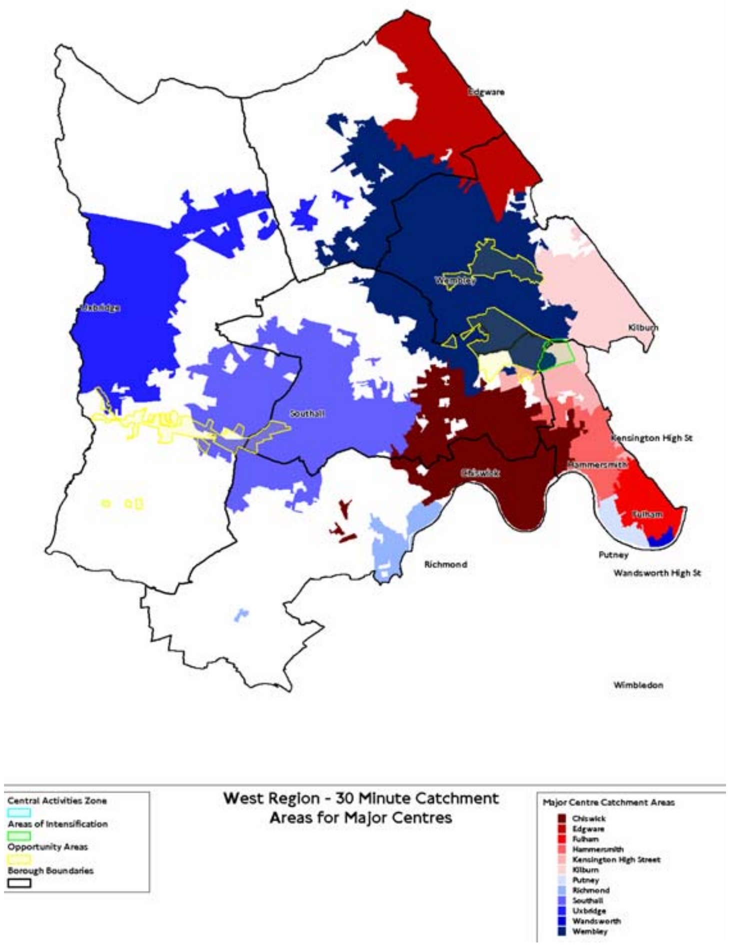
Accessibility to public transport for all areas in the sub-region is shown by Figure 11.5, based on Public Transport Accessibility Levels (PTALs). This highlights all areas according to their proximity to public transport and the quality of the services provided. The Metropolitan centres are focal points on the public transport network and this leads to relatively good access to public transport in their hinterlands. The areas immediately around these centres have mid-high levels of access, as do the areas in the south-east (innermost parts) of the sub-region around Hammersmith and Shepherd's Bush. The rest of West London tends to have a low accessibility level (a PTAL score of either 1 or 2). A score of 3 is achieved mostly in locations within walking distance of an Underground station, but the accessibility provided will be primarily radial towards inner and central London. Most of the Hayes-Southall opportunity area currently has poor access to public transport.

Figure 11.3: Public Transport Accessibility to Metropolitan Centres in West London



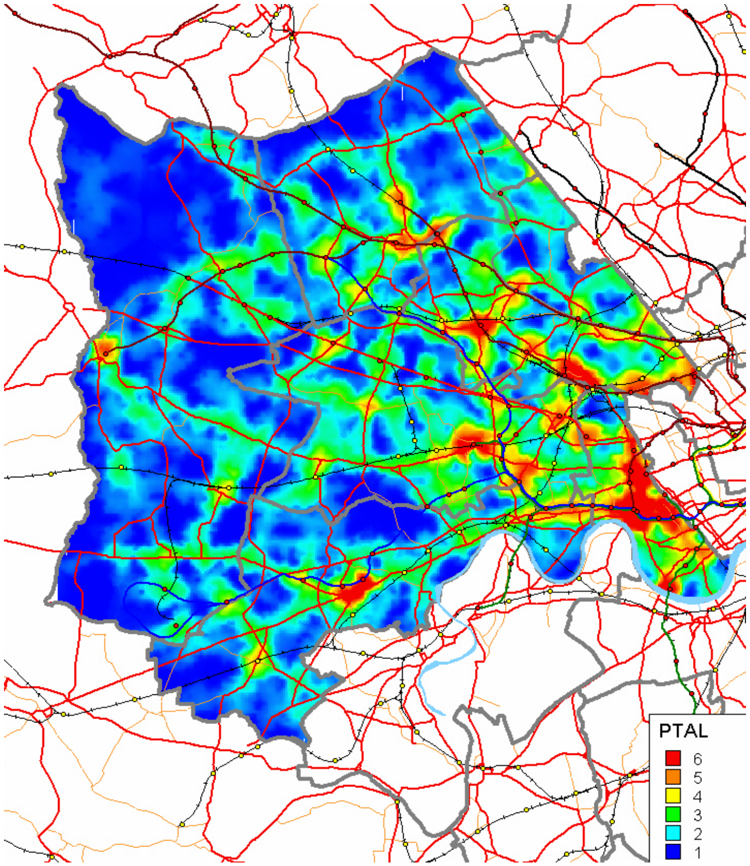
Source: CAPITAL (TfL)

Figure 11.4: Public Transport Accessibility to Major Centres in the West London



Source: CAPITAL (TfL)

Figure 11.5: Accessibility to Public Transport in West London



Source: PTALS (TfL)

Table 11.2 indicates the key opportunity and intensification areas for West London set against the planned transport intervention covering these areas, primarily: (1) Crossrail; (2) the establishment of a number of major strategic interchanges; and (3) the West London Tram.

Table 11.2: Development and Transport Opportunities in West London

Opportunity	Related transport interventions
Opportunity Areas	
Wembley (Inbound access for 5,000 jobs. Outbound for 400 homes)	▪ Crossrail 2
White City (11,000 jobs. 1,200 homes) Also inbound access required for large retail component	▪ Major Strategic Interchange proposed, including new station on West London Line at Shepherd's Bush ▪ West London Tram
Park Royal (10,000 jobs only)	▪ No strategic schemes
Heathrow/ Feltham/ Bedfont Lakes (5,500 jobs. 930 homes)	▪ Major Strategic Interchange and Crossrail at Heathrow
Hayes/ West Drayton/ Southall 35,000 jobs. 5,800 homes)	▪ Major Strategic Interchange and Crossrail at Hayes & Harlington ▪ West London Tram at Southall
Intensification Areas	
Willesden Junction	▪ Major Strategic Interchange ▪ Crossrail
Metropolitan/ Major Centres Intensification	
Ealing	▪ Major Strategic Interchange ▪ Crossrail ▪ West London Tram
Harrow	▪ None, although Crossrail runs close by to the east of Harrow
Hounslow	▪ None
Wembley (see above)	▪ Crossrail
Kilburn	▪ None
Southall	▪ West London Tram ▪ Crossrail
Hammersmith	▪ Major Strategic Interchange
Fulham	▪ None
Uxbridge	▪ West London Tram
Chiswick	▪ None

Table 11.3 highlights examples of new and potential transport schemes relevant to West London.

Table 11.3: New and Potential Transport Schemes Relevant to West London

Scheme	Comment
Uxbridge Road Tram	Strong support by local authorities along the route but considerable local opposition. May suffer from cooling of enthusiasm for tram schemes at government level. Reductions in road capacity reduce effectiveness.
West London Line	Capacity improvements possible if Eurostar slots can be reallocated.
Crossrail 1	West London needs to champion the request for Crossrail but will have to balance any additional funding requested (e.g. through the Business Rate) against the actual benefits.
M25 widening	M3-M4 Scheme underway but likely to be inadequate from day one. Will require additional capacity/restraint measures on the Western Stretch.
Southall Link Road	Linked to Southall Gasworks development.
M4 and M3 widening	Not currently programmed but vital links for the West London/Thames Valley commuter economy.
Great Western Rd Tram/Monorail	Promoters claim monorail is viable and would not reduce existing road capacity.
West London Orbital Rail	WLB preliminary study undertaken. No cost benefit analysis as yet.
Improvements to A312 corridor	Linking A40 (Greenford) with A3 (Hook). Unadopted DfT scheme suggests use of tunnelling on some stretches.
Closed Park and Ride schemes linked to 'Hub' developments	Direct links from highway infrastructure not allowing exit to local road system. Developer/BID financed.
Airtrack rail scheme	Direct access to Heathrow for residents in areas such as Feltham, and more generally easing pressure on other transport modes within West London – taking traffic off the sub-region's roads and from the Piccadilly Line.

Appendix B: Glossary

ALMO	**Arms Length Management Organisation**
ATCM	**Association of Town Centre Management**
BID	**Business Improvement Districts**
BME	**Black and Minority Ethnic**
CAGR	**Compound Annual Growth Rate**
CSR	**Corporate Social Responsibility**
EBP	**Education and Business Partnership**
EDS	**Economic Development Strategy**
EP	**English Partnerships**
FEI	**Further Education Institution**
FRESA	**Framework for Regional Employment and Skills Action**
GDP	**Gross Domestic Product**
GLA	**Greater London Authority**
HEI	**Higher Education Institution**
IBP	**Industrial Business Parks**
ICT	**Information and Communication Technology**
IDC	**International Data Corporation**
IES	**Institute of Employment Studies**
LATS	**London Area Transport Survey**
LDA	**London Development Agency**
LIP	**Local Implementation Plan**
LSC	**Learning and Skills Council**

MEO	**Minority Ethnic Outreach**
MICE	**Meetings, Incentives, Conferences and Exhibitions**
NVQ	**National Vocational Qualification**
PIL	**Preferred Industrial Locations**
PTAL	**Public Transport Accessibility Level**
RSL	**Registered Social Landlord**
SBS	**Small Business Service**
SEL	**Strategic Employment Locations**
SHI	**Starter Home Initiative**
SME	**Small and Medium Sized Enterprises**
SPG	**Supplementary Planning Guidance**
SRDF	**Sub-Regional Development Framework**
TfL	**Transport for London**
UDP	**Unitary Development Plan**
VAT	**Value Added Tax**
WLB	**West London Business**
WLP	**West London Partnership**

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Albanian

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Arabic

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Bengali

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Farsi

این مدرک در وبسایت وست لندن الیانس (www.westlondonalliance.org) و وبسایت وست لندن بیسنس (www.westlondon.com) موجود می باشد. همچنین نسخه خلاصه شده آن با خط درشت، بریل، بر روی دیسک کامپیوتری، کاست صوتی و به زبان شما موجود است.

Gujarati

આ દસ્તાવેજ તમને વેસ્ટ લંડન અલાયન્સની વેબસાઈટ (www.westlondonalliance.org) પર અને વેસ્ટ લંડન બિઝનેસ વેબસાઈટ (www.westlondon.com) પર પ્રાપ્ત થઈ શકે છે. તેનું સારાંશ મોટા અક્ષરમાં, અંધલિપિ (બ્રેલ)માં, ડિસ્ક પર, ઓડિયો કેસેટ પર રેકોર્ડ કરેલ તેમજ ગુજરાતીમાં મળી શકે છે.

Hindi

यह दस्तावेज़ वैस्ट लंडन अलाएंस (www.westlondonalliance.org) और वैस्ट लंडन विज़नैस वैबसाइट (www.westlondon.com) पर उपलब्ध है। यह संक्षेप में वड़ी लिखाई, डिस्क पर, सुनने वाली टेप या हिन्दी में मिल सकता है।

Polish

Dokument ten jest dostępny na stronach internetowych West London Alliance (www.westlondonalliance.org) i West London Business (www.westlondon.com). Skrócona wersja jest również dostępna w dużym druku, w alfabecie Brailla, na płycie kompaktowej, na kasecie magnetofonowej i w Pani/Pana języku ojczystym.

Punjabi

ਇਹ ਪਰਚਾ ਵੈਸਟ ਲੰਡਨ ਅਲਾਇੰਸ ਦੀ ਵੈਬਸਾਈਟ ਦੇ ਇਸ ਪਤੇ 'ਤੇ www.westlondonalliance.org ਅਤੇ ਵੈਸਟ ਲੰਡਨ ਬਿਜ਼ਨਸ ਦੀ ਵੈਬਸਾਈਟ ਦੇ ਇਸ ਪਤੇ 'ਤੇ www.westlondon.com ਮਿਲ ਸਕਦਾ ਹੈ। ਇਸ ਦਾ ਖ਼ੁਲਾਸਾ ਵੱਡੇ ਪ੍ਰਿੰਟ, ਬਰੇਲ, ਡਿਸਕ ਉੱਤੇ,ਆਡਿਓ ਕੈਸਟ ਉੱਤੇ ਅਤੇ ਪੰਜਾਬੀ ਵਿਚ ਵੀ ਮਿਲ ਸਕਦਾ ਹੈ।

Somali

Warqaddan waxa laga heli karaa goobta internetka ee West London Alliance Website (www.westlondonalliance.org) iyo goobta internetka ee West London Business (www.westlondon.com). Waxa kale oo la heli karaa iyadoo la soo koobay oo ku qoran far waawayn, farta loogu talagalay dadka aragga ka laxaadka la, ama ku duuban dhiski, ama cajeladaha maqalka ama ku ku qoran luqaddaada.

Urdu

یہ دستاویز آپ کو ویسٹ لنڈن آلائنس ویب سائٹ (www.westlondonalliance.org) اور ویسٹ لنڈن بزنس ویب سائٹ (www.westlondon.com) پر دستیاب ہے۔ اس کا خلاصہ بڑے حرفوں میں ، نابینا لوگوں کیلئے بریل (ابری ہوئی لکھائی) میں، ڈیسک پر، آڈیو کیسٹ پر آواز کی صُورت میں اور اُردو ترجمے میں دستیاب ہے۔