

# St James's Business Improvement District

A proposal for the St James's Business Improvement District  
2025 - 2030

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## Introduction

**In February 2025, the business community** (including commercial and not-for-profit organisations, leading institutions and property owners) **will be invited to vote on establishing St James's as a Business Improvement District (BID) and in so doing, will secure an investment of £17.8 million for the area.**

At ballot, unlike a political election, businesses are not being asked to vote between parties or candidates, instead they are being invited to vote on whether they would like to secure the proposed investment and programme of delivery, outlined in this document, for the St James's District.

There is a lot at stake:

- A vote in favour will allow St James's Business Improvement District to deliver the £17.8 million plan over the next five years.
- A vote against will mean the £17.8 million investment will be lost; the plan and all projects described herein will not be delivered; and instead, only basic statutory services will be provided.

**Please read this document, watch the film and meet the team before the ballot because there is a lot to be gained or lost depending on your vote.**

# Executive Summary

St James's Business Improvement District will be the catalyst for positive, tangible change in the St James's District.

Business Improvement Districts (BIDs) are locally-focused partnerships that are formed by businesses to improve their trading environment. They are statutorily established once a successful ballot of businesses has been achieved.

Whilst the demand for statutory services continues to rise, councils have had a 26% real term cut in core spending power since 2010, weakening their ability to deliver services and meet new challenges. The consequences of these pressures are visible on the streets and threatens London's world-leading reputation.

The £17.8 million investment will be ring-fenced to deliver an ambitious and coherent five-year delivery plan for the St James's District. It has been produced following 24 months of consultation with businesses and the wider community including amenity and conservation groups and the St James's Steering Committee.

## Day One Delivery

From day one the St James' Business Improvement District will deliver:

- A dedicated security patrol team to tackle crime and provide reassurance 24 hours a day, 7 days a week
- An enhanced street cleaning programme, including:
  - Weekly bin washing
  - Daily hot-washing of pavements stains and chewing gum removal
  - Removal of graffiti within 45 minutes of reporting
- Dedicated sustainability programme for the office sector to ensure St James's remains an exceptional place to work and tightened minimum energy standards are met, with free retrofitting advice and energy assessments
- Co-design with the local community and businesses much needed walking, cycling and public realm improvements
- Deliver campaigns to attract targeted audiences, whilst also promoting the area to employees, residents and domestic audiences
- Convene a strategic crime taskforce to bring together all the key agencies, businesses and organisations in the St James's District
- People sleeping rough and begging
- Access to business-critical data and insights specific to the economic performance of the St James's district

## Five Years Delivery

Over five years St James's Businesses Improvement District will deliver:

- A bespoke West End Crime Reduction Strategy

- Advocating for additional policing based on visitor numbers (rather than resident population) and CCTV to protect everyone who lives in, works in or visits the St James's District
- A sustainability programme to reduce carbon emissions, improve air quality, reduce waste and support a circular economy
- More trees and planting to support climate adaptation and biodiversity
- Support, diversify and celebrate St James's academies, galleries and architectural heritage, attracting new audiences.
- A rolling programme of culture, art and educational promotional activities, events and activations linking wherever possible to London's cultural calendar
- Support for hospitality businesses on the predominantly commercial streets with to encourage more consumers to these parts of St James's
- A programme of better, safer and wider footways, quiet cycle routes and safer crossings, potentially including some of the projects shown [here](#)
- Reduction in the number and impact of dockless bikes and e-scooters

**The shared aim for the business community** (including commercial and not-for-profit organisations, leading institutions and property owners) **is to provide the support and services that St James's needs in order to meet its full potential whilst also preserving what makes it unique.**

## Focus Areas

The improvement plan for the St James's District will focus on five delivery pillars.

### Managing St James's

- Daytime safety
- Night-time safety
- Cleaning and maintenance
- Caring for the community
- Sustainable management
- Resilience support

### Shaping St James's

- Protecting and celebrating heritage
- Transforming the public realm
- Sustainability and net zero
- Inward investment

### Promoting St James's

- Publicity campaigns
- Local privilege scheme
- Activations, events and attractions

### Advocating for St James's

- Championing St James's
- Strategic crime reduction
- Protecting transport passengers
- Reinstating tax-free shopping

### Supporting St James's

- Dedicated member engagement
- Keeping everyone safe
- Keeping businesses informed
- Business critical insights

# Statement from the St James's Steering Committee

There is nowhere else in the world quite like St James's, with its exceptional history, distinguished character, exquisite architecture and specialist businesses. However, St James's has been neglected of investment for decades and is absent of a single organisation equipped to manage the district.

Today, St James's relies entirely on basic street services, delivered by statutory bodies, which continue to deteriorate in line with government cuts. The consequence is evident in rising crime, declining footfall, dwindling sales, a tired public realm, an alarming stock of energy-inefficient buildings and businesses relocating out of the district. This is in stark contrast to neighbouring areas which use Heart of London Business Alliance (HOLBA) to deliver their business improvement districts.

Over the past 24 months we have established the St James's Business Steering Committee and, with HOLBA's support, have developed a plan that has been tailored to the specific needs of St James's. The SWOT analysis section provides a solid foundation on which the proposed plan has been developed. It is a fully financed and bespoke five-year plan that will commence on the 1<sup>st</sup> April 2025.

From day one, HOLBA will deliver services that will make St James's safer, cleaner and more attractive to investors, businesses, workers and visitors today; while also convening the St James' community and decision makers to plan for the district's future.

HOLBA offers St James's the reassurance of a 20-year track record in managing some of the most demanding and unique parts of London. It is an expert in the industry and is highly respected by its members.

We are unanimous in our view that St James needs HOLBA. At ballot in February 2025, each of our organisations will vote in favour of HOLBA delivering the St James' Business Improvement District. There is a lot to be gained or lost depending on the outcome. We, therefore, invite you to get in touch to discuss it further.

We look forward to hearing from you.

Tim Allibone - The Crown Estate

Rick Bains - Saranac

Kia Baxter - Warburg Pincus

Adrian Bunnis - Greycoat

Chris Gilbert - London Library

Jeff Singleton - KSL

Charles Howard - Lazari

Dermot Herlihy - Dukes

Dominic Higgitt - Resolution

Liz Hutchinson - British Academy

Phil Muller - Oak Hill Advisers

Richard Townsend – Institute of Directors

Geordie Willis – Berry Brothers & Rudd



## Heart of London Business Alliance

Heart of London Business Alliance (HOLBA) is a 500-strong multi-sector business membership organisation in the Heart of London's West End.

Comprising property owners and occupiers, HOLBA brings businesses together to agree, address and invest in their shared short- to long-term priorities. This delivers economies of scale, joint procurement of key services, greater influence and better results for all, as the table below reveals. Further information about HOLBA can be found in the FAQ section.

A comparison of HOLBA's recent delivery in the areas it manages compared with performance in St James's over the same period reveals the difference that a BID can make to an area:

Heart of London Area	St James's District
Over five years crime fell by 4% in the Heart of London area compared to a 17% increase for the Core West End area	Crime increased by 30%
£42 million of direct investment secured	No investment secured
2% increase in sales over 12 months	11% decrease in sales
Over £1 billion saved for members in business rates, payroll and VAT relief	No savings secured
£250,000 saved by members who signed up to the discounted Waste and Recycling Collection Scheme	Businesses pay standard rates for waste collection
11,000 tonnes of CO <sub>2</sub> emissions saved through our waste disposal methods	No reduction in emissions achieved
Secured government and council support for businesses during the pandemic, including alfresco dining on St Martin's Lane	The outcomes of HOLBA's advocacy case were made available to all qualifying businesses in Westminster
£6.6million (including council contributions) secured for St Martin's Lane, Sackville Street and Vigo Street public realm schemes	No recent public realm investment
Sackville Street and Vigo Street public realm schemes are largely complete	Public realm, in particular pedestrian routes, are in poor condition with no improvements delivered in recent years

16,777 incidents resolved by HOLBA'S 24/7 security team in 2023/24 alone	No private security available to support businesses, resulting in vulnerability to crime
More than 2,000 people sleeping on our streets received our support	No dedicated or coordinated support for rough sleepers resulting in entrenched challenges
£3.1million through consumer activations	No coordination of cultural and educational activities and missed opportunities to secure sponsorship funding

## Heart of London Area

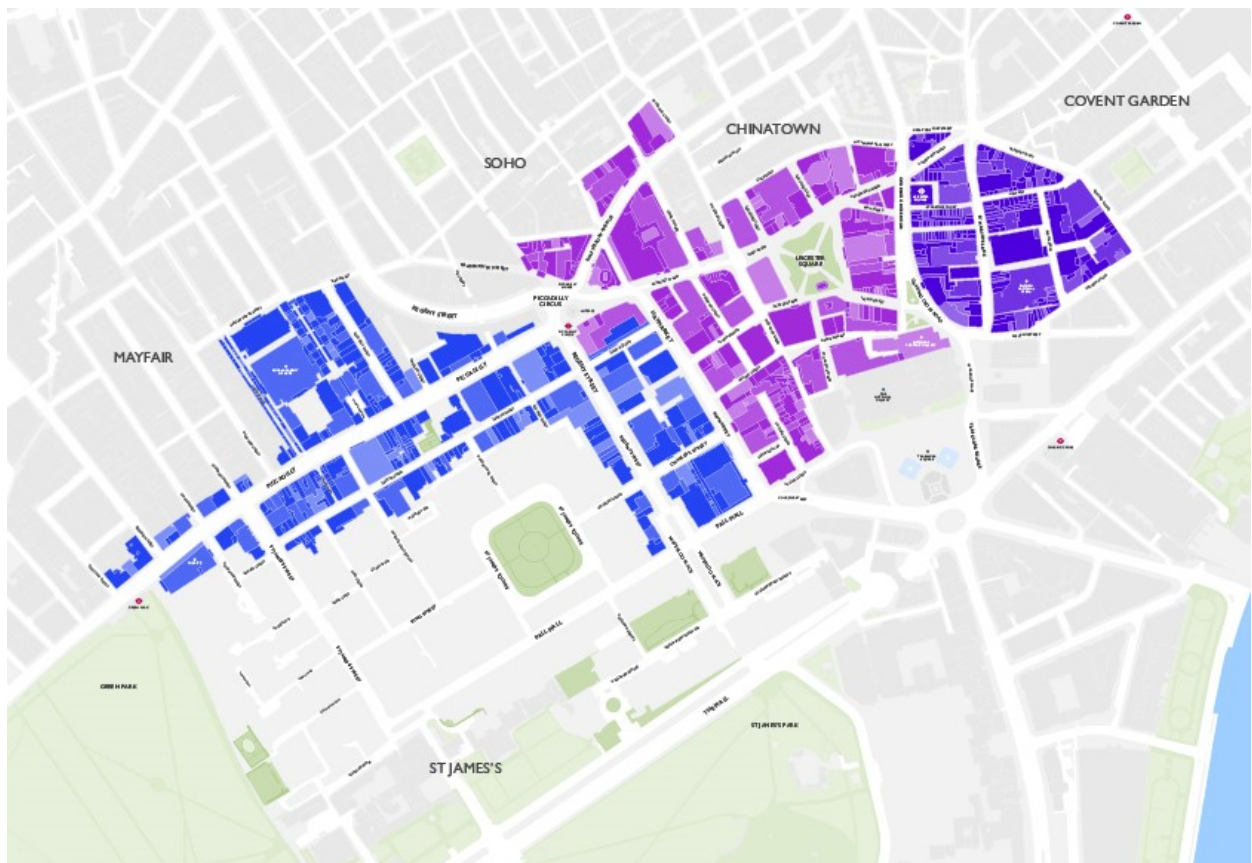
The Heart of London area, as seen on the map, currently comprises three districts:

- Piccadilly, Green Park station, Regent Street St James's and Jermyn Street
- Leicester Square, Haymarket and Piccadilly Circus
- St Martin's including Charing Cross Road

Each district, distinctive in character, is neighbouring, complementary and contributes to the ecosystem of the whole area.

The Heart of London area plays a significant role in the wider London and UK economies. A full set of bespoke data and insights for the Heart of London area and its districts is available [here](#).

## Heart of London Area Map



The above map shows the districts currently managed by Heart of London Business Alliance. A list of streets in the proposed St James's District can be seen in the [Frequently Asked Questions](#) section.

## St James's District

St James's is a unique treasure and plays a critical role in London's global success.

St James's as an area has existed from the eleventh century and today retains most of its historic grid form, which is elegantly framed by the key thoroughfares of The Mall, Pall Mall, St James's Street, Piccadilly and Regent Street St James's, with St James's Square at its centre. St James's is adjacent to, but distinct from, the rest of the West End.

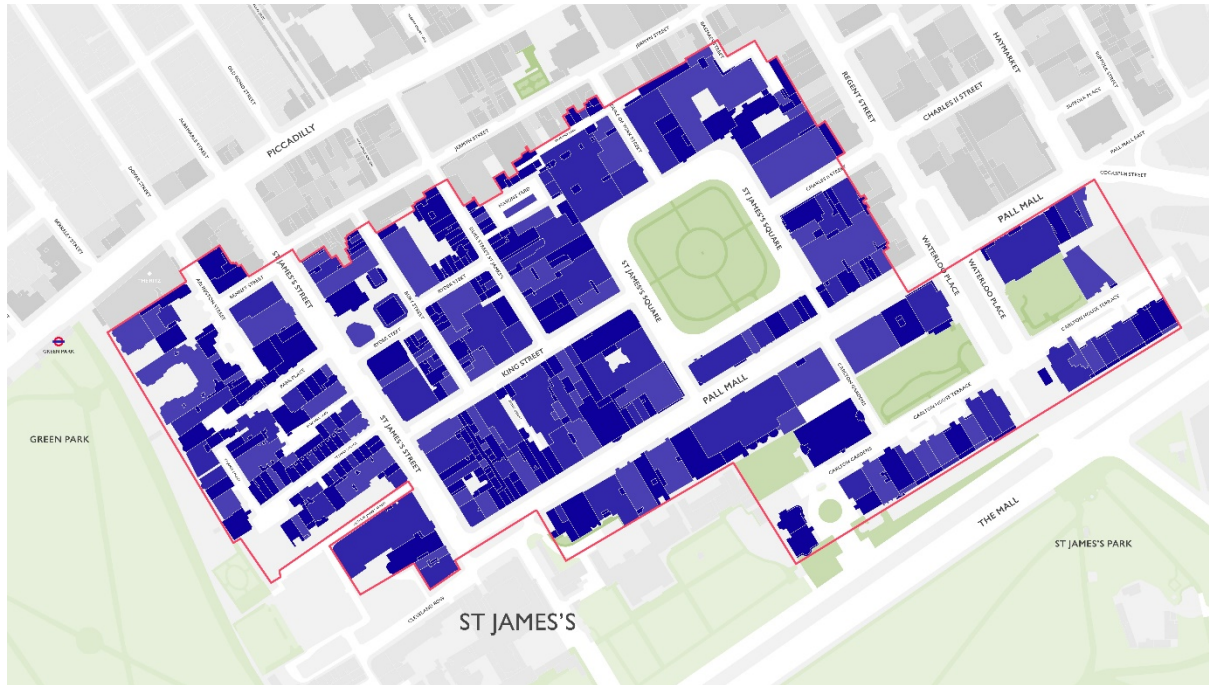
A former royal estate, it is the historical heart of London, which is reflected in its handsome architecture, townscape and gardens. St James's retains many of its historical amenities, notably high-quality menswear, art galleries and antique dealerships, which reflect the area's distinct identity. St James's has long been the home of royalty, aristocracy, political, industrial and military leaders, artists, visionaries, thinkers and creatives. It is also home to a residential community whose homes are rightly protected in planning policy.

Today, St James's is designated as a Conservation Area and is a place of imposing historic architecture, including the Tudor St James's Palace in its south-west corner and St James's Church on Piccadilly. St James's Church has been at the heart of the community since 1684. Generations of Londoners and international visitors have found a connection there, attending services, dinners and concerts, meeting in its unique courtyard or taking some time to enjoy the garden. This is demonstrated by the [Wren project](#), an ambitious plan to restore and rejuvenate the historic Sir Christopher Wren-designed church and its surrounding area. St James's is home to three of the four national academies, with leading thinkers shaping the future and contributing to education and insight.

### St James's District in numbers:

- 16.8 million visitors in 2023
- 193 offices, representing 82% of the area's commercial sector
- 1,056 residents

## St James's District Map



The above map shows the proposed St James's District. A list of streets can be seen in the Frequently Asked Questions section.

# St James's BID Delivery Plan

This section outlines how, over the next five years, St James's Business Improvement District will deliver £17.8 million of improvements for St James's.

The delivery plan and vision have been developed following a thorough SWOT analysis of the district and comprehensive engagement with the business and wider community. The full reports are available in their respective sections.

## Vision for St James's District

To protect, promote and enhance the character and heritage of St James's, supporting its businesses to thrive into the future.

The vision will be delivered across five distinct pillars:

- **Manage** – We will create an environment that is clean, safe and well-managed, elevating the experience for everyone.
- **Shape** – We will revitalise the area, protect its heritage, secure its sustainable future and attract new investment, delivering tangible results.
- **Promote** – We will deliver experiences that delight and enrich visitors, celebrating the art, character and heritage of St James's.
- **Advocate** – We will protect, defend and promote our members' interests, listening and campaigning on the issues that matter most.
- **Support** – We will empower, inform and raise our members' profiles, providing a one-stop shop of support and services to help your organisation thrive.

## Delivery pillars

This section considers each of the delivery pillars in turn. It describes the aim of each pillar; looks back at what Heart of London Business Alliance (HOLBA) has achieved over last five years; explores the district's strengths, opportunities and threats; and then looks ahead to how the St James's Business Improvement District will address these over the next five years.

# Managing St James's

St James's Business Improvement District will create an environment that is clean, safe and well-managed, elevating the experience for everyone.

## Looking Back (2020–25)

Much was achieved and progress made over the last five years, including:

- Responded to 30,000 street cleaning issues with the rapid response service
- 16,777 on-street incidents resolved by the 24/7 security team
- Kept the streets clean across the Heart of London area:
- Over 12 months 1,059 items of graffiti removed within 45 minutes
- Over 12 months 10,250 fly-posters removed
- Over 12 months 1,045 fly-tipping incidences resolved
- 1.9m pieces of chewing gum removed annually
- 180 businesses participated in the waste and recycling preferred supplier scheme, saving themselves £257,000 while also significantly increasing levels of recycling.

The benefits of HOLBA's commitment to high-quality street services will be extended to St James's.

## SWOT Summary

The SWOT indicates the barriers to, and benefits from, investing in services that make the area clean, safe, professionally managed and easier to navigate, summarised here:

### Strengths

While reported crime has risen by 17% in the Central West End and 30% in St James's, it fell by 4% in the Heart of London area. Heart of London Business Alliance's additional security and coordination of multi-agency responses has been crucial to addressing persistent crime, antisocial behaviour and street nuisance; and it already operates in Jermyn Street.

### Weaknesses

Police funding does not fully take account of visitor numbers. The St James's District has just 1,050 residents compared with more than 16.8 million visitors a year, resulting in the area being significantly under-policed.

The lack of police response has created a high level of apathy amongst the business community to report crime. Consequently, the true level of crime is under-reported and the area is under-policed.

Staff, especially shop workers, are daily targets of abuse, threats, and attacks.

The impact of over 46,000 visitors per day places disproportionate demands on street services.

The high volume of visitors also attracts criminal activity, particularly theft and shoplifting.

State occasions, parades, events and demonstrations generate periods of exceptionally high footfall, necessitating an enhanced street cleaning and security provision which is not fully resourced.

## Opportunities

The Labour government's commitment to increasing police numbers could contribute to reducing crime and antisocial behaviour in the West End.

Emerging technologies, in particular autonomous vehicles, are a potential opportunity to increase the frequency of street cleaning. The introduction of a monitored CCTV system could contribute to making St James's safer.

## Threats

Perceptions that the narrow streets of the St James's District are unsafe after dark could deter visitors, especially those from diverse communities.

Resilience to issues such as extreme weather and cyber-crimes are increasing threats to businesses and organisations.

## Looking ahead (2025-2030)

Over the next five years the St James's BID will focus on:

- Daytime safety
- Night-time safety
- Cleaning and maintenance
- Caring for the community
- Sustainable management
- Resilience support

### Daytime safety

A key priority for the St James's Business Improvement District is ensuring that the area is amongst the most inclusive and safe places to visit, live, trade and work. This means making it safe for everyone. Over the next five years the St James's BID will:

- Provide a 24/7 on-street security presence, which members can call upon for rapid assistance
- Deliver a crime-reduction strategy and action plan that holds stakeholders to account and lobby for increased police presence and patrols
- Operate joint patrols and surveillance with the police and the council



- Provide and fund a peer-to-peer radio link network, which enables members to be informed and updated about disturbances or threats
- Collate and share crime intelligence with the police and the council
- Partner with local police to implement a community policing approach
- Work with members to implement anti-theft guidance and prevention measures
- Provide resilience training for members and their teams, so that we all know how to respond together to unexpected events
- Explore the use of technology-based solutions such as CCTV cameras and facial recognition software to deter criminals
- Review and advise on public realm designs to ensure that crime is designed out and safety improvement opportunities, in particular better lighting, are designed in.

## Night-time safety

The St James's BID will actively support safety at night, across public and private streets, spaces and venues and protect quiet enjoyment of residential areas.

Over the next five years the St James's BID will:

- Provide a 24/7 on-street security presence, which members can call upon for rapid assistance
- Deliver Welfare and Vulnerability Engagement (WAVE) and Ask Angela training and support Night Haven services
- Foster partnerships between businesses, property owners, the council and police, with a key focus on prevention, intervention and support
- Establish and raise awareness about “safe spaces” (a place where people can go to if they feel vulnerable or threatened and can feel confident that they will not be exposed to discrimination, criticism, harassment or any other emotional or physical harm) across the district
- Conduct night safety audits, with specific focus on women and people with disabilities, to hear first-hand priorities for improving their experiences to help them feel safe and welcome in the area at night
- Actively encourage all businesses to sign up to the Mayor's Women's Night Safety Charter and designate a Women's Night Safety Champion
- Deliver the [Best Bar None accreditation scheme](#), which recognises and celebrates excellent management of evening and night-time venues and offers free advice and guidance to participants
- Retain Purple Flag status for Heart of London area by working with the entire evening and night-time economy
- Host bi-monthly Pub Watch meetings for all businesses, the police and local council, with the aim of helping to achieve a safe, secure, and responsibly managed commercially active environment

- Raise business' concerns with public bodies through a coordinated neighbourhood tasking meeting, as well as providing access to the online crime reporting system.

## Cleaning and maintenance

The St James's BID will invest in additional, regular cleaning and waste management services to maintain clean streets for the benefit of everyone. These are in addition to the basic level of services delivered by the council.

Over the next five years the St James's BID will:

Over the next five years HOLBA will:

- Wash all street bins once a week
- Remove pavement staining daily as required
- Hotwash pavements and remove chewing gum daily
- Remove graffiti within 45 minutes of reporting
- Identify and report cleaning and maintenance, infrastructure and utility issues, suspicious behaviour and dockless bike or pedicab issues pursuing a response until rectified
- Act as a conduit between businesses and the statutory bodies and agents, removing hassle and saving business resources
- Provide member businesses with key information that affects them, operational updates, event notifications and introductions to their peers
- Provide a knowledgeable, friendly welcome and offer directions to visitors.

## Caring for the community

The St James's BID will be committed to working with its partners, including the council and its front line services, to deliver long-term solutions to people sleeping rough on the streets of the West End and to support vulnerable people out of gangs, trafficking and organised crime.

Over the next five years the St James's BID will:

- Fund, homelessness charity partner, Connections at St Martin's-in-the-Fields, who provide a rough sleeping engagement programme, assisting those seeking accommodation, mental health and substance abuse support
- Provide an on-street service referring vulnerable individuals to Street Link for further support and assistance
- Support our members in social value initiatives and encourage services such as the London Device Bank to reduce digital exclusion and Open Roaming free WiFi services to reduce data poverty.

## Sustainable management

Over the next five years the St James's BID will:

- Provide a preferred commercial waste and recycling supplier scheme with Veolia, maximising recycling, guaranteeing that no waste goes to landfill and minimising vehicle movements to reduce traffic congestion, delays and air pollution
- Offer discounted member rates for commercial waste and recycling collection, saving St James's BID members money
- Update the whole fleet of cleaning, waste and recycling collection vehicles to emit zero emissions by 2026.

## Resilience support

Over the next five years the St James's BID will:

- Work with partners to deliver measures to protect members and the St James's District from the effects of extreme weather events due to climate change
- Work with specialist agencies to provide support and advice to organisations on cyber-threats and crime
- Work with utilities to ensure reliable and sufficient supply including ultra-fast broadband to buildings.

# Shaping St James's

St James's Business Improvement District will revitalise the area, protect its heritage, secure its sustainable future and attract new investment, delivering tangible results.

## Looking back (2020-2025)

Heart of London Business Alliance's (HOLBA) key achievements over the last five years include:

- Secured a £1.9 million investment to deliver transformational public realm improvements on Sackville Street and Vigo Street, £4.7m to transform St Martin's Lane and £180,000 for public realm designs for the Green Park and Piccadilly gateway
- Reduced carbon emissions by up to 22% from buildings which participated in the Business Climate Challenge
- Successfully advocated for, and delivered, alfresco dining on key streets during the pandemic
- Successfully lobbied for a £1.57 billion package to save the arts and culture sector during the pandemic.

## SWOT Summary

The SWOT analysis highlights that the St James's District is an exceptionally rich cultural, architectural, historic and culinary place in which to spend time and do business. However, it faces several challenges and threats, which are summarised here.

### Strengths

The St James's District's iconic vistas, landmarks, rich and varied fabric, layers of history and architecture all contribute to attracting 16 million visitors a year and its reputation as a premium location for professional services businesses.

### Weaknesses

The current offer and occupier mix is not keeping pace with the latest consumer trends for cultural and experiential activities.

The district has many agents and public bodies responsible for its management and maintenance. The consequence of this is frequent duplication or gaps in services and resources, as well as conflicting priorities and timescales. The tangible impact is visible across the streets.

Absence of a dedicated strategy for London's West End, resulting in an uncoordinated approach for the area including management, planning, licensing, safety, sustainability and public spaces.

## Opportunities

The considerable opportunities to shape the district include: attracting and retaining the pre- and post-theatre and gallery audiences; activating some of the district's commercial streets with art and cultural experiences.

A programme of sensitive footway and wayfinding enhancements across St James's which reflect the historic character of the neighbourhood, while supporting and encouraging safe and sustainable ways to travel, could vastly improve everyone's experience of the district.

Expanding buildings retrofit services would build on the success of the Business Climate Challenge programme.

## Threats

The St James's District faces significant threats, including climate change, changing consumer tastes, loss of visitor numbers, competition from other visitor destinations and competition to secure investment in its public realm.

Almost 50% of St James's commercial buildings might soon become unlettable due to changes to minimum energy standards ratings. This figure increases to 66% of all the district's commercial buildings by 2030 when minimum energy standards are further tightened. The impact of these changes could be damaging if left unaddressed.

## Looking ahead (2025-2030)

Over the next five years the St James's BID will focus on:

- Protecting and celebrating heritage
- Transforming the public realm
- Sustainability and net zero
- Inward investment.

## Protecting and celebrating heritage

Over the next five years the St James's BID will:

Support, diversify and celebrate St James's academies, galleries and architectural heritage, attracting new audiences

- Work with the St James's Conservation Trust and the St James's Neighbourhood Forum to protect and restore heritage and architectural assets
- As part of the visitor economy, support key commercial streets where the evening economy is limited and make the case for the sensitive relaxation of licensing rules, where appropriate.

## Transforming the public realm

A detailed audit of the entirety of the St James's public realm identified 24 location-specific opportunities to improve the area, summarised below.

### *For pedestrians*

Over the next five years the St James's BID will:

- Improve crossings, introducing tactile surfaces and continuous crossings at priority junctions, all in natural stone materials that are appropriate for this conservation area
- Deliver sensitive and appropriate widening of footways to improve pedestrian comfort and accessibility
- Review existing lighting and introduce CCTV as part of a West End-wide monitored system, on passages and courtyards
- Declutter footways to remove redundant street furniture and clutter Repair and update the Legible London wayfinding signs along the main thoroughfares.

## Enhance heritage and local character

Over the next five years the St James's BID will:

- Introduce consistent footway materials across the neighbourhood – some streets have a patchwork of surface materials that is not consistent with the historic heritage and character of this conservation area
- Bring heritage to the forefront, restoring and celebrating historic features and ensuring heritage plaques are visible
- Restore or repaint existing heritage street furniture
- Seek to relocate cycle parking, particularly dockless bikes, away from important historic locations, such as St James's Palace, and key pedestrian routes where they detract from the enjoyment of St James's and are a hazard to pedestrians
- Where appropriate, and possible, provide more trees and greenery to support biodiversity to enhance the experience of walking through St James's; when locations are considered for additional trees, we will retain historic vistas
- Consider Smithson Plaza as an opportunity for cultural activations which showcase and celebrate St James's.

“The St James's Business Improvement District will be the much-needed trusted partner in restoring and protecting the character and heritage of historic places in St James's.”

Andrew Love, Chair, St James's Conservation Trust

### *For cyclists*

Over the next five years the St James's BID will:

- Enhance conditions for cyclists, including safer lane widths and crossings, and improved signage.

More detail on the pedestrian, cycling and public realm proposals, including their locations, can be seen [here](#).

### Sustainability and net zero

We are proactively responding to climate change and wider environmental challenges, working with our partners including Westminster City Council, the Mayor of London and other Business Improvement Districts to deliver a Net Zero Carbon City.

Over the next five years the St James's Business Improvement District will:

- Deliver the HOLBA Net Zero Carbon Strategy and Action Plan, which will help businesses, not-for-profit organisations and institutions to retrofit older buildings, decarbonise supply chains, shift to zero-emissions deliveries, reduce waste and increase recycling, contributing to the Mayor of London's net zero carbon target by 2030 and recycling rate of 65%
- Provide net zero carbon route maps to support members to achieve carbon reduction across all three scope types
- Expand retrofit services through the St James's BID one-stop shop, which includes free energy assessments and Energy Efficiency Grants to members via a new HOLBA Sustainability Toolkit
- Engage St James's members in the HOLBA Sustainability Members Engagement Group, which is a source of support, advice, collaboration and funding opportunities for organisations
- Promote circular economy principles and inclusivity such as the donation of digital devices to the London Device Bank ([see here](#))
- Seek new tree and other planting scheme opportunities across the district; create rain gardens to make the area more climate-resilient; and support biodiversity as part of our public realm schemes
- Promote the waste and recycling preferred supplier scheme, with discounted prices for members and free education programmes, saving members money.

### Inward investment

The St James's District will continue to face stiff international and regional competition from other destinations to attract visitors, occupiers and inward investment. We will harness future trends analysis to deliver a coordinated programme to promote St James's District as an attractive place to invest in

property, a desirable location for office-based businesses and also to provide cultural and educational experiences.

Over the next five years St James's Business Improvement District will:

- Actively seek and promote increased inward investment into the district, stimulating economic activity and safeguarding the area's future
- Develop and promote a compelling narrative for the St James's District as a place to invest and do business, utilising commissioned economic reports
- Amplify awareness of the success and future opportunities within the St James's District by working on HOLBA's strategic priorities with key partners.



## Promoting St James's

St James's Business Improvement District will deliver experiences that delight and enrich visitors, celebrating the art and heritage of St James's.

### Looking back (2020-2025)

Much was achieved and progress made over the last five years, including:

- In 2020, published the [Arts and Culture](#) Strategy which connects businesses and cultural institutions to deliver major new cultural innovations
- and toolkit to enable the collaborative delivery of new cultural innovations
- Created and delivered first-of-their-kind visual art experiences including Art of London, Art After Dark and Scenes in the Square to attract and inspire people to visit and return
- Delivered Scenes in the Square, an evolving programme of statues that celebrate the film industry and premieres in Leicester Square, generating over 750 pieces of press coverage since its launch
- Delivered the Take a Moment mental well-being art campaign, reaching over 398 million people through a variety of media
- Secured £3.1 million of investment through for consumer activations through collaborative relationships.

### SWOT Summary

The SWOT analysis highlights the rise of competing destinations and the importance of having a compelling, attractive and accessible offering that celebrates the unique character and heritage of St James's.

#### Strengths

London ranks No.1 in the World's Top 100 Cities, with 4 out of 5 visitors drawn by London's culture.

St James's offers outstanding heritage, architecture, galleries, public art and knowledge and education.

#### Weaknesses

London is heavily dependent on international tourism (84% of the overnight market).

The loss of footfall and consumer spend in St James's may affect the viability of the district's hospitality businesses and the cultural sector.

#### Opportunities

There is an opportunity to engage cultural and educational organisations and artists to activate and promote the existing galleries and auction houses of St James's.

Extending HOLBA's established Arts and Culture Strategy to bring businesses and institutions together to celebrate the art in suitable places, such as Smithson Plaza.

The academies in St James's, in particular the research and lecture series, are an opportunity to enrich people's lives.

## Threats

There is increased competition from other destinations locally, nationally and internationally.

There is currently no economic development strategy or inward investment plan for the West End.

## Looking ahead (2025-2030)

Over the next five years the St James's BID will focus on:

- Publicity campaigns
- Local privilege scheme
- Activations, events and attractions
- Festive lights

## Publicity campaigns

Over the next five years, St James's Business Improvement District will:

- Deliver campaigns to attract international audiences, whilst also promoting the area to employees, residents and domestic audiences for whom St James's is 'on their doorstep'
- Leverage the Heart of London Business Alliance's arts and culture programme alongside destination marketing to target and attract increasingly diverse visitor audiences
- Present St James's cultural offer as a comprehensive package by collaborating with its world-class institutions and independent galleries, and working in partnership with The Crown Estate and Westminster City Council
- Deliver integrated campaigns with London-wide partners, as well as international campaigns with London & Partners
- Promote the area as the "go-to" destination for visitors seeking authentic heritage experiences as well as its rich public arts and academies sectors.

## Local privilege scheme

Over the next five years, St James's Business Improvement District will:

- Encourage businesses to take advantage of the [Heart of London Club](#) privilege scheme to showcase their offer to over 3,000 employees across the Heart of London area

- Grow employee participation in the scheme, which provides employees across the West End with access to exclusive discounts, offers, giveaways and experiences across the entire area.

## Activations, events and attractions

Over the next five years, St James's Business Improvement District will:

- Form a St James's Arts and Culture Steering Group to foster community, collaboration and strategic guidance for our work in St James's
- Deliver experiences for visitors to enjoy, from Scenes in the Square through to Art of London and Art after Dark, and to work with businesses to help them maximise footfall and spend
- Deliver a programme of art, architecture and heritage trails and installations, connecting our cultural partners whilst also encouraging footfall and diverse audiences
- Deliver a rolling programme of cultural, art and educational promotional activities, events and activations linking to London's cultural calendar
- Prioritise delivering free art and culture experiences to all, contributing to making art accessible for everyone
- Extend the Art After Dark Gallery Hop to create even more reasons for enthusiasts and the curious to spend an evening discovering galleries which offer unique events curated for the occasion.

## Festive lights

Over the next five years, St James's Business Improvement District will:

- Support the programme of Christmas lights on Piccadilly and Jermyn Street, which add vibrancy, benefit businesses and bring joy to visitors
- Support businesses in curating an elegant lighting programme across the commercial streets.

## Advocating for St James's

St James's Business Improvement District will protect, defend and promote our members' interests, listening and campaigning on the issues that matter most.

## Looking back (2020-2025)

Much was achieved and progress made over the last five years, including:

- Secured legislation that gives Transport for London the power to regulate and licence pedicabs
- During the pandemic, helped to secure the £1.57 billion Culture Recovery Fund (by commissioning new economic data and analysis), a VAT reduction

from 20% to 12.5% for hospitality and tourism businesses, business rates relief for eligible businesses and implementation of alfresco dining on key streets

- Contributed to regulating and licensing street entertainment and busking in Westminster
- Successfully campaigned to keep the one-day Travelcard in 2023, freeze Tube fares and lower travel costs on Fridays to encourage people back to the office.

## SWOT Summary

The SWOT analysis demonstrates that it is vital that work continues to advocate for, and represent, the St James's District at the highest levels of local, regional and national government.

### Strengths

Heart of London Business Alliance represents the Heart of London area on key strategic boards and groups to promote and better manage our area and that of wider London.

### Weaknesses

No single body currently making the case for better coordination of services, better management and control measures in St James's. This, compounded by duplication of services, means that there are important gaps that need to be resolved.

### Opportunities

Secure public sector investment in the area's footways and public spaces. The current business rates system adversely affects businesses in the Heart of London, and the new Labour government has made a commitment to review the current system.

### Threats

Attracting 16.8 million visitors a year and the St James's District's comparative wealth makes it a target area for criminals who indulge in shoplifting, robbery and theft.

Loss of investment, professional service businesses and visitors to destinations with policy and regulatory frameworks that support a vibrant consumer experience.

## Looking ahead (2025-2030)

Over the next five years the St James's BID will focus on:

- Championing St James's businesses
- Strategic crime reduction
- Protecting transport passengers

- Reinstating tax-free shopping

## Championing St James's businesses

Over the next five years, St James's Business Improvement District will:

- Engage fully with government consultations on business rates and other business issues including proposed changes to employment, planning and environmental laws and regulations to fully represent members' views and interests
- Advocate for, and represent, the St James's District at the highest levels of local and national government to effect change on the issues affecting St James's to ensure that the trading environment is as good as it can be, helping businesses flourish
- Deliver a programme of engagement with Rachel Blake, MP for Cities of London and Westminster
- Work together with the St James's Conservation Trust, the St James's Neighbourhood Forum and other Business Improvement Districts in Westminster
- Champion businesses' interests by participating in key groups including:
  - The Tourism Advisory Group for London
  - BusinessLDN's quarterly West End Streets Group
  - London & Partners Sustainable Tourism Group
  - The Business Advisory Group run by TfL
  - London's Deputy Mayor for Business's Strategic Coordinating Group
  - London's Deputy Mayor for Culture and Creative Industries' London Creates Campaign
  - Westminster MP Business Advisory Group
  - TfL's Business Advisory Group
  - New London Architecture's New Sounding Board
  - Night-time Commission Group for the Greater London Authority
  - Westminster City Council's Business Improvement District Group
  - Business LDN's London Business Improvement District Group
- Police Ward Panels and meetings:
  - St James's
  - West End
  - Holborn and Covent Garden
  - Safer Business Network Steering Group
  - London Chamber of Commerce Business Crime Forum.

## Strategic crime reduction

Over the next five years, St James's Business Improvement District will:

- Convene a strategic crime taskforce to bring together all the key agencies, businesses and organisations in the Westminster area
- Call for a dedicated CCTV system and harnessing new technologies for London's West End and a dedicated, ring-fenced policing and enforcement patrols.

## Protecting transport passengers

Over the next five years, St James's Business Improvement District will:

- Liaise with TfL on the development and implementation of a new licensing and enforcement regime which will keep transport passengers, pedestrians and other road users safe from unlicensed and antisocial transport operators
- Campaign for investment to upgrade Piccadilly Circus station, including step-free access

## Reinstating tax-free shopping

Over the next five years, St James's Business Improvement District will:

- Campaign to reinstate tax-free shopping, recognising that the economy is losing out on billions of pounds following the previous government's decision to remove tax-free shopping in 2020, contributing to reduced footfall from international visitors
- Campaign for a fresh set of impact forecasts based on new data to be commissioned either by industry or by government
- Support the campaigns led by the Association for International Retail.

## Supporting St James's

St James's Business Improvement District will empower, inform and raise our members' profiles, providing a one-stop shop of support and services to help your organisation thrive.

## Looking back (2020-2025)

Much was achieved and progress made over the last five years, including:

- Over 12 months a total of 3,210 direct support actions for businesses' activities, ranging from Best Bar None assessments, recruitment services, content photoshoots and much more
- A bespoke series of insights reports focused on the real estate market in the Heart of London area
- Helped members create promotional content for our Heart of London Club and consumer channels

- Member visits and meetings with 379 businesses and a total reach of 2,144 people over 12 months
- Hosted briefing and networking events that reached 242 businesses over 12 months.

## SWOT Summary

The SWOT analysis highlights that businesses, not-for-profit organisations and institutions in the St James's District would benefit from support in dealing with crime and antisocial behaviour, as well as guidance on navigating planning and licensing policies.

### Strengths

HOLBA is knowledgeable on every aspect of the area, its businesses and organisations and has good relationships with statutory bodies and other organisations. These are invaluable in resolving issues for members.

Collection of performance data and insights, assisting businesses in their decision-making.

### Weaknesses

The St James's District lacks coordinated services and is suffering from poor management and control measures yet is London's busiest night-time destination. This, compounded with duplication of services, means there are important gaps that need to be resolved.

### Opportunities

There is an opportunity to expand initiatives such as the net zero and buildings retrofit programme, the privilege discount scheme, discounted waste collection and crime reduction and safety training for front line staff.

### Threats

Attracting millions of visitors each year makes St James's District attractive to criminals who target business, workers and visitors.

Businesses, not-for-profit organisations and leading institutions face challenges on several fronts including staff shortages, rising costs and regulatory restrictions.

## Looking ahead (2025-2030)

Over the next five years the St James's BID will focus on:

- Providing a dedicated member engagement service
- Keeping everyone safe
- Keeping businesses informed
- Area, economy and investment insights

## Providing a dedicated member engagement service

A dedicated Engagement Team will work with all businesses and their staff to resolve issues and improve everyone's experience of trading in the district.

Over the next five years, The St James's Business Improvement District will:

- Provide weekly communications to help businesses keep up to date with what is happening in the district, including protests, premieres, roadworks and filming
- Provide regular insights and performance reports on the district and the wider Heart of London area; these include crucial data and benchmarking metrics such as transport ridership data, West End footfall, sales figures, area planning and licensing applications
- Identify, advise on and secure external funding for initiatives such as energy saving measures in buildings
- Feature businesses on the privilege scheme and encourage staff to enrol to take advantage of the offers available
- Advise businesses on how to challenge highways and licensing issues.
- Deliver a comprehensive on-boarding service for new businesses in St James's District, proactively connecting new businesses with their new neighbours, stakeholders and the wider community.

## Keeping everyone safe

Over the next five years, St James's Business Improvement District will:

- Provide free training to keep the St James's District's residents, staff and visitors safe and secure, including content on counterterrorism, welfare and vulnerability and conflict resolution
- Provide training on the radio link network and ALERT, which is our security management platform. Members using these can share intelligence and are informed of disturbances or threats, and can call on our private security team for rapid assistance
- Coordinate Pub Watch meetings for our members, the police, licensing, Neighbourhood Coordinators, Safer Business Network and other partners to exchange security information to keep venues, customers and staff safe

## Keeping businesses informed

Over the next five years, St James's Business Improvement District will:

- Host quarterly networking events to bring together the district's diverse portfolio of businesses, providing a platform for development opportunities and creating a sense of community among the Heart of London districts



- Produce weekly operational and company updates, ensuring that members are first to know about upcoming consultations, protests and events, political updates, as well as regular reminders of St James's BID services,
- Ensure that members' issues are escalated to the relevant authorities and stakeholders, particularly common and repeated issues – St James's BID will follow through to tackle and resolve businesses' issues
- Regularly meet with:
  - Westminster City Council Neighbourhood Coordinators
- Police Ward Panels
  - TfL
- Theatre Watch, enabling sharing of common challenges in the theatre sector

### Area, economy and investment insights

Over the next five years, St James's Business Improvement District will exclusively for members provide:

- Exclusive, tangible, actionable and accurate data to track St James's District performance and inform business decisions
- A better in-depth understanding of the St James's District's and surrounding areas' performance, sector trends, economic profiles, footfall, sales and occupancy, benchmarked against central London through the new Economic and Real Estates Insights available exclusively to members
- A data and insights programme, which includes:
  - Monthly area performance reports
  - Quarterly reporting on the health of the real estate market and other key sectors
- An Annual Report, establishing a regular summary baseline for future reporting.

# Frequently Asked Questions

## What is a Business Improvement District?

Heart of London Business Alliance (HOLBA) is a Business Improvement District (BID). BIDs are business-led, locally funded partnerships that are formed to improve a defined commercial area. BIDs are statutorily established once a successful ballot has been secured.

## How is a BID established?

Under the [Business Improvement Districts \(England\) Regulations 2004](#), BIDs are statutorily established once a successful ballot has been secured.

## What is the duration of the BID term?

BIDs have a maximum term of five years before returning to their electorate for renewal. For more information on BIDs in the UK please visit the Government's [website](#).

## St. James's BID Area

The following streets are included in the St. James's BID area

- Angel Court
- Apple Tree Yard
- Arlington Street
- Babmaes Street (part street)
- Bennet Street
- Blue Ball Yard
- Bury Street
- Carlton Gardens
- Charles II Street (part street)
- Crown Passage
- Duke of York Street
- Duke Street St. James's (part street)
- King Street
- Mason's Yard
- Ormond Yard
- Pall Mall (part street)
- Park Place
- Ryder Street
- St. James's Place
- St. James's Square
- St. James's Street (part street)
- Carlton House Terrace (part street)

- Waterloo Place (part street)

## What is Heart of London Business Alliance?

Heart of London Business Alliance (HOLBA) is a more than 500-strong membership organisation established, led and financed by businesses within the Heart of London area. For the past 20 years, HOLBA has proven its ability to improve the commercial, cultural and trading environment of the Heart of London.

Comprising property owners and occupiers from all sectors, HOLBA brings businesses together to consider, agree on and invest in improvement plans for their individual and shared trading environments.

Throughout HOLBA's lifespan, we have already invested a total of £42million of BID levy funds directly into the Heart of London area to address the shared priorities of our property owners as well as occupier members.

## How does HOLBA operate?

HOLBA currently consists of six BID entities: one occupier BID and one property owner BID in each of the three districts. This will increase to eight once St James's BID is established. Each entity has separate budget accountability while contributing to the overall business plan. This allows for economies of scale, joint procurement, greater influence and better results for all.

Indeed, the Heart of London area is home to three of just four property owner BIDs in the country; this structure best reflects the short- and long-term interests of those who own, occupy, manage and rent property and spaces in the area.

## How is HOLBA governed?

Our board of directors is responsible for the long-term success of the company. Its role is to provide oversight of the company's strategic and fiscal management. It is made up of non-executive directors and presided over by an elected chair. The membership of the board is representative of all business sectors operating in the Heart of London Business Alliance Districts. The liability of each director is limited to £1.

The board membership is representative of the current BIDs and includes:

- BAFTA
- Capital Arches Group
- Criterion Capital
- Delfont Mackintosh Theatres
- Edwardian Hotels
- Fortnum & Mason

- Gascoyne Holdings
- Great Portland Estates
- Hearst UK
- Odeon Cinemas
- Old Park Lane Management
- Royal Academy of Arts
- Soho Estates
- The Crown Estate
- The Hippodrome Casino
- The Ritz London

Once St James's BID is established, board membership will be updated to include members from the district.

HOLBA employs a team of experts to execute the business plan in accordance with the board's strategic direction and agreed budget. HOLBA's directors are unpaid.

## How is HOLBA financed?

HOLBA is a not-for-profit company, limited by guarantee. It is primarily financed by its members via an annual fee. The money is ring-fenced to be spent in the Heart of London area. We also secure and leverage additional non-levy investment for the area.

Following a successful ballot, invoices are likely to be sent out between the announcement of the ballot result and 1 April 2025.

## Where do business rates go?

Westminster City Council is responsible for the administration and collection of business rates and council taxes in the City of Westminster. The council only retains 5% of the money it collects annually, with the remaining 95% going to central government to be spent elsewhere. Click [here](#) for more information on business rates in Westminster.

## What do business rates pay for?

The council uses the money it retains to deliver a range of services across the borough including education, libraries, social services, housing, planning, licensing, trading standards, enforcement, fire and public safety, waste management, refuse collection and recycling.

## Why do we need the Heart of London Business Alliance if we are already paying business rates?

Whilst the demand for statutory services continues to rise, councils across the UK have had a 26% real terms cut in core spending power since 2010, weakening their

ability to deliver services and meet new challenges. The consequences of these pressures are visible on the streets across London and threaten the West End's reputation as a world-leading destination for culture and commerce.

In 2004, businesses in the West End decided that they could not stand by and allow their streets to deteriorate. Instead, they had the foresight to set up HOLBA, a vehicle that allows businesses to raise, control and determine how their money is invested to improve the trading environment of the Heart of London area.

## Is HOLBA part of the council?

Heart of London Business Alliance and the statutory providers including Westminster City Council are separate entities.

HOLBA is non-political and has a business electorate. It is an entirely not-for-profit company and 100% of its income is ring-fenced to spend on business priorities. It is established, controlled and funded by businesses in the Heart of London area.

It is established via an independently regulated ballot of businesses and has a maximum five-year term.

## Will we be paying the council and HOLBA for the same services and projects?

Westminster City Council provides HOLBA with a statement of baseline services it will fund and deliver over the five-year term. This provides transparency, prevents duplication and allows HOLBA to focus on investing in services that enhance those of the council, or entirely new services. Ultimately, the baseline services agreement ensures that businesses are not paying twice for the same services.

That said, HOLBA proactively works in partnership with public and private organisations to align priorities, optimise investment and enhance the standards of the Heart of London area.

## BID Rules – Occupier

Heart of London Business Alliance is governed by statutory regulations. As such, once a majority vote has been achieved, the BID levy becomes mandatory for all defined ratepayers and/or property owners. Our BID rules provide the basis for calculating the BID levy, which forms the substantive proportion of Heart of London Business Alliance's budget.

The rules are:

- The BID term will be 5 years, from 1 April 2025 to 31 March 2030
- The BID levy will apply to office, retail, leisure, hotel, car parks and advertising uses (as defined in the Operating Agreement)
- The BID levy will be applied to rated properties with a rateable value of £225,000 or more
- The BID levy will be a fixed rate of 1.35% of rateable value as of 1 April 2025 using the 2023 business rating list, rising annually by 0.03 percentage points (i.e. 1.38% in year 2, 1.41% in year 3, 1.45% in year 4, 1.48% in year 5)
- A levy payer will not be liable to pay more than £50,000 on any hereditament in each BID in any financial year (1 April-31 March)
- Where the rateable value for individual hereditaments (rated properties) changes and results in a lower BID levy, it will only come into effect from the start of the fiscal year in which the change is made
- Charitable organisations in receipt of mandatory charitable relief from rates will receive an 80% allowance
- The BID levy will not be increased other than as specified in these levy rules
- There will be no VAT charged on the BID levy
- The BID levy is to be paid in full within 14 days of receipt of invoice
- The liability for the daily BID levy will fall on the eligible ratepayer.

## BID Finances – Occupier

Income generated from the BID levy is ring-fenced to be invested in the area and to deliver our business plan. Projects delivered by our BID are over and above those carried out by public services through statutory provision.

### Five-year budget (2025 – 2030)

	2025-26	2026-27	2027-28	2028-29	2029-30	Total
<b>Income</b>						
BID Levy	1,494,752	1,539,595	1,585,782	1,633,356	1,682,357	7,935,841
Other	10,995	10,995	10,995	10,995	48,495	92,475
<b>Total</b>	<b>1,505,747</b>	<b>1,550,590</b>	<b>1,596,777</b>	<b>1,644,351</b>	<b>1,730,852</b>	<b>8,028,316</b>
<b>Expenditure</b>						
Corporate Communications	78,249	80,596	83,014	85,505	88,070	415,434
External Affairs	48,340	49,790	51,283	52,822	54,407	256,641
Placeshaping	171,031	176,162	181,447	186,891	192,497	908,028
Promoting	324,264	333,992	344,012	354,332	364,962	1,721,563
Managing	431,264	444,202	457,528	471,254	485,392	2,289,640
BID Renewal	9,247	9,525	9,811	10,105	76,800	115,488
Core Costs	235,103	242,156	249,421	256,904	264,611	1,248,194
Contingency	74,738	76,980	79,289	81,668	84,118	396,792
<b>Total</b>	<b>1,372,236</b>	<b>1,413,403</b>	<b>1,455,806</b>	<b>1,499,480</b>	<b>1,610,856</b>	<b>7,351,781</b>

## Budget assumptions

- The budget figures are indicative and based on the anticipated levy income using 2023 rateable values
- There is an assumed 0.03% annual inflationary increase
- The BID levy income reflects 100% of the amount that will be invoiced; a 5% allowance has been made for non-collection in each year
- The levy income may fluctuate and is subject to the market at the time of the ratings assessment
- The other income is the minimum level of projected additional funding
- The projects and services expenditure reflect the current priorities. These may change, causing variances across the five-year term
- Any material variations will be approved by the HOLBA board
- Core costs will cover the company's operational costs with the intention of maintaining them beneath the industry benchmark of 20%.



## Voting process – Occupier

If you would like to secure five years of dedicated investment in the St James's District and the delivery of this plan, please cast your vote.

The voting process is as follows:

1. Notice of ballot issued on 24 January 2025
2. Ballot papers distributed on 7 February 2025
3. Voters cast and return ballot papers by 5pm, 11 March 2025
4. Ballot result announced on 12 March 2025

## Making your vote count

If you would like to secure five years of dedicated investment in the St James's District and the delivery of this plan, please cast your vote.

In the instance of an unsuccessful ballot, the projects, services and campaigns outlined in this plan and funded by Heart of London Business Alliance will not take place.

St James's District will continue with the basic statutory services solely provided by public bodies.

## BID Rules – Property Owner

Heart of London Business Alliance is governed by statutory regulations. As such, once a majority vote has been achieved, the BID levy becomes mandatory for all defined ratepayers and/or property owners. Our BID rules provide the basis for calculating the BID levy, which forms the substantive proportion of Heart of London Business Alliance's budget.

### Owner Definition

The liability for the BRS-BID (Business Rate Supplement - Business Improvement District) levy will fall upon the owner of a leasehold interest granted for a term of 75 years or more or, in the absence of a relevant lessee, the freeholder as identified from the records held on His Majesty's Land Registry. This rule applies on the total term length of the lease.

The rules are:

- The BRS-BID term will be 5 years from 1 April 2025 to 31 March 2030
- The BRS-BID levy will apply to office, retail, leisure, hotel, car parks and advertising uses (as defined in the Operating Agreement)
- The BRS-BID levy will be applied to rated properties with a rateable value of £225,000 or more
- The BRS-BID levy will be a fixed rate of 1.5% of rateable value as of 1 April 2025 using the 2023 business rating list, rising annually by 0.03 percentage points (i.e. 1.53% in year 2, 1.56% in year 3, 1.59% in year 4, 1.62% in year 5)
- A levy payer will not be liable to pay more than £50,000 on any hereditament in each BID in any financial year (1 April-31 March)
- Where the rateable value for individual hereditaments (rated properties) changes and results in a lower BRS-BID levy, it will only come into effect from the start of the financial year in which the change is made
- Charitable incorporated organisations (UK-registered charities) that are eligible owners will receive 80% reduction on the BRS-BID levy
- Any exemptions for vacant listed properties in the ratepayer BID do not apply to the BRS-BID
- Organisations liable for BRS-BID levy that are also the ratepayer for the property will be liable for both the BRS-BID levy and the ratepayer BID levy in full. No discount or relief is applicable
- The BRS-BID levy will not be increased other than as specified in these levy rules
- There will be no VAT charged on the BRS-BID levy
- The BRS-BID levy is to be paid in full within 14 days of receipt of invoice
- The liability for the daily BRS-BID levy will fall on the eligible property owner (see owner definition)

## BID Finances – Property Owner

Income generated from the BID levy is ring-fenced to be invested in the St James’s District and to deliver our business plan. Projects delivered by our BID are over and above those carried out by public services through statutory provision.

### Five-year budget (2025 – 2030)

	2025-26	2026-27	2027-28	2028-29	2029-30	Total
<b>Income</b>						
BID Levy	1,832,620	1,887,599	1,944,227	2,002,553	2,062,630	9,729,628
Other	10,995	10,995	10,995	10,995	48,495	92,475
<b>Total</b>	<b>1,843,615</b>	<b>1,898,594</b>	<b>1,955,222</b>	<b>2,013,548</b>	<b>2,111,125</b>	<b>9,822,103</b>
<b>Expenditure</b>						
Corporate Communications	95,940	98,819	101,783	104,837	107,982	509,361
External Affairs	59,269	61,047	62,878	64,765	66,708	314,666
Placeshaping	209,700	215,991	222,471	229,145	236,019	1,113,327
Promoting	397,578	409,505	421,790	434,444	447,478	2,110,796
Managing	528,770	544,633	560,972	577,801	595,135	2,807,310
BID Renewal	11,338	11,678	12,029	12,390	76,800	124,235
Core Costs	288,258	296,906	305,813	314,988	324,437	1,530,402
Contingency	91,631	94,380	97,211	100,128	103,131	486,481
<b>Total</b>	<b>1,682,484</b>	<b>1,732,959</b>	<b>1,784,948</b>	<b>1,838,496</b>	<b>1,957,690</b>	<b>8,996,577</b>

## Budget assumptions

- The budget figures are indicative and based on the anticipated levy income using 2023 rateable values
- There is an assumed 0.03% annual inflationary increase
- The BID levy income reflects 100% of the amount that will be invoiced; a 5% allowance has been made for non-collection in each year
- The levy income may fluctuate and is subject to the market at the time of the ratings assessment
- The other income is the minimum level of projected additional funding
- The projects and services expenditure reflect the current priorities; these may change, causing variances across the five-year term
- Any material variations will be approved by the HOLBA board
- Core costs will cover the company's operational costs with the intention of maintaining them beneath the industry benchmark of 20%.

## Voting process – Property Owner

If you would like to secure five years of dedicated investment in the St James's District and the delivery of this plan, please cast your vote.

The voting process is as follows:

- Notice of ballot issued on 27 January 2025
- 5. Ballot papers distributed on 10 February 2025
- 6. Voters cast and return ballot papers by 5pm, 12 March 2025
- 7. Ballot result announced on 13 March 2025

## Ballot outcome

Following a successful ballot, Heart of London Business Alliance will begin the term on 1 April 2025. Invoices will be sent out between announcement of the ballot result and 1 April 2025.

Following an unsuccessful ballot, the projects, services and campaigns proposed and funded by Heart of London Business Alliance in this document will not take place. This means that only the statutory basic services provided by public bodies will be carried out.

## Making your vote count

If you would like to secure five years of dedicated investment in the St James's District and the delivery of this plan, please cast your vote.

In the instance of an unsuccessful ballot, the projects, services and campaigns outlined in this plan and funded by Heart of London Business Alliance will not take place.

St James's District will continue with the basic statutory services solely provided by public bodies.

## Contact details

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Chief Executive

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# Appendix 1: Heart of London SWOT analysis

The following appraisal of the Heart of London area strengths, weaknesses, opportunities and threats (SWOT) is based on data, evidence, foresights, observation, consultation, engagement and expertise gathered over the last five years. It underpins HOLBA's five-year business proposal that directly focuses on building on the area's strengths, addressing the weaknesses, capitalising on growth opportunities and protecting it from potential threats.

The SWOT analysis has been used as the basis for our action plan in the main body of this document, with a summary included under each of the five pillars. It is reproduced in full here.

## Contents

The SWOT analysis is presented thematically, as follows:

- Economy
- Built environment, place and public realm
- Accessibility and transport
- Experience and culture
- Evening and night-time economy
- Safety and security
- Cleaning and street services
- Sustainability
- Public and statutory services: council
- Public and statutory services: digital
- Public and statutory services: water
- Public and statutory services: gas and electricity

## Economy

### Strengths

- Heart of London area has a Gross Value Added (GVA) of £10 billion, 112,000 direct jobs, also generating business for supply chains and jobs to support the West End economy.
- 33% growth in Gross Value Added since 2019.
- The Heart of London area economy makes a disproportionately positive impact, creating 20% of the West End's total Gross Value Added, while covering only 12.8% of its area.
- The Heart of London area has an ecosystem of interdependent and diverse businesses, with the arts and culture sector securing customers for hospitality, food and beverage.

### Weaknesses

- Current licensing and planning policy, along with the Cumulative Impact Assessment which includes Regent Street St James's, are focused on restriction and curtailment. This risks other competitor areas taking market share of audiences away from the Heart of London area.

### Opportunities

- HOLBA's Investment Case shows that the Heart of London area could achieve an increase in local Gross Value Added by 122% and create at least 6,000 new jobs by 2040 by investing in the area's public realm.
- The new Labour government is focused on economic growth and is committed to simplifying and accelerating the planning system for infrastructure projects.
- The government have also committed to improving workers' rights which could help with recruitment and retention.
- Forecast growth of London's population potentially creates additional demand for the Heart of London area's restaurants, cafés, hotels and shops.

### Threats

- The fall in the number of planning applications indicates that the growth of the West End economy may be slowing down.
- The rise in working remotely for part of the week has suppressed demand for some West End businesses, including lunchtime and evening food and beverage.
- The new Labour government's proposed changes to workers' rights could impact adversely on businesses.
- Footfall and spend have not fully recovered since 2019.



## Built environment, place and public realm

### Strengths

- The West End has an attractive network of streets and lanes, which varies in scale and architectural style. Some are traffic-free and accessible with good wayfinding and connectivity.
- The many Listed Buildings are some of the most architecturally attractive, culturally rich and historically significant in the world.
- Historic architecture, vistas and landmarks such as Waterloo Place provide a unique world-class cityscape to enjoy 24/7.

### Weaknesses

- There are limited opportunities to create new traffic-free or green spaces or widen footways.
- Streets are also littered with hundreds of dockless bikes and unregulated pedicabs which block footways, make streets inaccessible and spoil the aesthetics, experience and reputation of the area.
- Older buildings are challenging to improve in terms of their accessibility and to retrofit to a high standard.
- The provision of amenities for workers has dropped since the pandemic discouraging workers from coming into the office.

### Opportunities

- HOLBA's placeshaping programme of 44 public realm projects would deliver growth of 14% in employment and Gross Value Added by 122% by 2040 (without these projects, growth would be restricted to 5% employment and 104% Gross Value Added respectively).
- HOLBA's Tenant Curation Plan would help retain and attract the best mix of ground-floor uses, enhancing and protecting the area's character and quality of experience for users whilst securing a material return on investment for tenants and landlords.
- The council's and The Crown Estate's "Park to Park" scheme includes proposals for Regent's Street St James's, Piccadilly Circus and Haymarket and will create a traffic-free boulevard with a vista towards Waterloo Place.
- The "Park to Park" scheme fulfils another public realm project identified in HOLBA's Placeshaping Strategy and incorporates the principles of our other strategic documents including the Cultural Strategy and Evening and Night-time Economy Strategy.
- The new Labour government has committed to simplifying and accelerating the planning system to unlock economic growth.

## Threats

- Absence of a dedicated strategy for London's West End, resulting in an uncoordinated approach for the area including planning, licensing, digital screens, safety, sustainability, etc. HOLBA has stepped in to identify, fund and deliver strategies which are also available for the council to adapt to help other areas realise their potential.
- 49% of the St James's District's office commercial space requires significant upgrades and investment to meet the legal minimum energy standards and net zero targets set for 2030. Unmet, this might lead to an exodus of businesses and their workers, leaving buildings empty and completely changing the face of the area.
- Whilst Westminster remains one of the busiest boroughs for planning, it has seen the largest relative drop in major applications (75%) between 2013-2023.

## Accessibility and Transport

### Strengths

- 87 million journeys each year to the Heart of London area (2023-24) are directly served by five Tube lines and three Underground stations, Green Park, Piccadilly Circus and Leicester Square.
- A night Tube service operates on Fridays and Saturdays, servicing the area's evening and night-time economy.
- The Elizabeth line at Tottenham Court Road and Bond Street brings up to 120,000 additional people to the West End every day.
- International visitors can be in the West End in 30 minutes from Heathrow via the Elizabeth line.
- There is a high volume of frequent bus services during the day and night. 11 different bus routes serve Piccadilly Circus, of which eight run 24/7.

### Weaknesses

- Tube stations serving St James's are not accessible.
- There is a complete absence of cycle routes in the Heart of London area which represents a significant gap in London's cycle network and impacts its ability to attract workers and some visitor markets.

### Opportunities

- The Elizabeth line brings up to an additional 65,000 people a day through Tottenham Court Road station, which is a significant potential target audience.
- HOLBA's public realm schemes would include new cycle routes and better pedestrian routes.
- In 2023 Regent Street attracted 71 million visitors with spending of £1billion. Completing construction of the Sackville and Vigo Street public realm schemes would encourage some of this footfall onto Piccadilly and into St James's.
- Changes to Piccadilly Circus need to be future-proofed in the Regent's Park to St James's Park public realm programme to support step-free access to the station, which needs to be built when funding becomes available.
- Expanding and enhancing the provision of night-time transport options would facilitate growth in the evening and night-time economy.
- The new Labour government has committed to improving bus services and giving more powers to local leaders to deliver local transport systems that work for communities.

### Threats

- Absence of a dedicated strategy for London's West End, resulting in an uncoordinated approach for the area including planning, licensing, digital

screens, safety, sustainability, etc. HOLBA has stepped in to identify, fund and deliver strategies which are also available for the council to adapt to help other areas realise their potential.

- TfL only received 50% of its capital funding requirement from government last year, which will continue to negatively impact accessibility, affordability and safety of travel now and into the future.

## Experience and Culture

### Strengths

- The entertainment part of the West End is London's busiest night-time destination.
  - 4 out of 5 visitors come to London for its culture.
- London's cultural and heritage assets are rated amongst the top three in the world.
- West End Arts and Culture Gross Value Added is estimated to be £4.8 billion, equivalent to 23% of all of London's Arts and Culture sector output.
- In 2023, theatres in the Heart of London area generated £238.4 million in gross revenue, accounting for 24% of the total gross revenue across all Society of London Theatre (SOLT) member theatres.
- Heart of London area theatres attracted audiences of 4.2 million, representing approximately one-quarter of the total attendance for all SOLT member theatres.
- The Heart of London area has a strong presence of arts and entertainment venues. It is home to:
  - 60 film premieres each year
  - 15 theatres
  - 4 casinos
  - 3 major galleries
  - 8 commercial galleries
  - 7 cinemas
- The Heart of London area is globally renowned for its experience alongside its unparalleled culture, entertainment and night-time experience (see section below).

### Weaknesses

- London is heavily dependent on international tourism (comprising 84% of the overnight market).
- A traditional, older and narrow demographic for the West End's arts and cultural offer.
- Current offer and occupier mix is not keeping pace with the latest trends which indicate consumers' preferences for culture and experience.
- Some street activities in the Heart of London area do not complement the identity of the area.
- Lack of comprehensive, cohesive and complementary programming of the cultural experience and offer, resulting in a free-for-all that disappoints visitors.
- Street entertainment, although seen by some as a strength of the area is also seen as a weakness because it lacks process, management and fairness.

## Opportunities

- Designating the current Heart of London area as an International Culture and Entertainment Zone would give recognition to the distinct and unique role the area plays in the broader economy. It would allow for licensing and planning policy, cleaning, maintenance and safety regimes and regeneration plans to be tailored to allow the area to fulfil its full potential as a destination of global significance and help to drive critical investment into the area.
- A more proactive, positive and modern approach to digital screens would not only complement the needs of the evening and night-time economy but will ensure the area is relevant to its increasingly media-expectant consumers and investors.
- A single body, actively programming an annual calendar of celebrations and events complementary to the Heart of London area's core identity would attract huge investment and an increasingly diverse audience.
- Engaging cultural organisations and artists to collectively activate and promote the Heart of London area would present the area as a single destination of unrivalled variety and attraction.
- Leverage the high-profile "brand" of the West End to generate additional activity from global brands, leading to increased visitor numbers and spend per person.

## Threats

- Absence of a dedicated strategy for London's West End, resulting in an uncoordinated approach for the area including planning, licensing, digital screens, safety, sustainability, etc. HOLBA has stepped in to identify, fund and deliver strategies which are also available for the council to adapt to help other areas realise their potential.
- There is currently no creative industry strategy for London, which has contributed to Westminster losing 20% of its creative industries sector in the last decade.
- Rising costs, lack of venues and competition from other destinations.
- The growth of rival destinations, with dedicated investment, better, more modern and adaptable venues and spaces.
- Limited opportunities and platforms in the public realm for art.
- Arts Council England cuts have deeply affected the West End arts sector.
- In the past decade, London has lost 35% of its grassroots music venues and 58% of LGBT+ venues.
- Pressures on consumer spending, shifts in working patterns and a challenging international tourism market.

## Evening and Night-time Economy

### Strengths

- The concentration and variety of entertainment available attracts workers and visitors to the area.
- Most night-time activity is clustered between the Leicester Square area and Soho, with a few late-night establishments in St James's and Mayfair, therefore residential areas are protected.
- Cultural venues, particularly theatres, cinemas and live shows in the evening and night-time are critical drivers for the wider ecosystem.
- Evening and night-time customer dwell-time and spend are higher where entertainment venues are located near complementary businesses which are open before and after performances.
- St James's area is used by people throughout the evening and night-time to meet up, enjoy street performers, eat and people-watch, much as they do in the day.
- Iconic vistas, landmarks and open spaces are integral to the Heart of London area's character and that of the Heart of London area after dark and play important functional roles.

### Weaknesses

- The evening and night-time economy relies on a small geographic catchment area for visitors, with the percentage of night-time visitors coming from outside the city falling from 41% of the total to 38%.
- After dark, many of the large buildings and side streets negatively impact on the character and atmosphere of the public realm. They lack architectural lighting, active frontages and upper floor activity.
- The number and variety of places to go to after a show is limited and does not meet the demand.
- There is a lack of club and music venues in the Heart of London area.
- On Piccadilly, evening venues are far apart and fragmented. This leads to a loss of footfall and spend across the area.
- The council's Cumulative Impact Assessment restricts the ability of new venues to open later in the evening or night-time.
- The Cumulative Impact Assessment applied in isolation is an incomprehensive, ineffective and insufficient tool to generate and drive growth.
- The evening and night-time economy is often considered as negative by the council because its definition currently focuses on licensed premises which leads to a management and regulation, rather than an opportunity-focused outlook.

## Opportunities

- The pre- and post-theatre peaks are opportunities to attract audiences earlier and retain audiences for longer in bars, cafes, clubs and restaurants.
- Activating side streets and small spaces would provide an intimate and attractive alternative to larger night-time venues.
- Diversifying the offer would attract new and more diverse audiences.
- Relaxation of licensing regulations in a considered and curated way would allow the economy to grow, creating jobs and increasing tax receipts.
- Expanding the evening offer and extending opening hours in Piccadilly, where the evening economy currently is limited, would drive growth and greater return on investment.
- Expanding public transport provision would ensure the evening and night-time economy can access both the workforce and visitors it needs to succeed.
- Providing a positive planning policy framework would protect and enhance the evening and night-time economy venues and businesses.
- The council is developing an 'After Dark' Evening and Night-time Strategy to improve the nightlife in Westminster that looks beyond the raw data provided in the Cumulative Impact Assessment, with the aim that communities can be safe, sustainable, inclusive and accessible.

## Threats

- Absence of a dedicated strategy for London's West End, resulting in an uncoordinated approach for the area including planning, licensing, digital screens, safety, sustainability, etc. HOLBA has stepped in to identify, fund and deliver strategies which are also available for the council to adapt to help other areas realise their potential.
- London has multiple established and emerging nightlife destinations including the wider West End to the South Bank, King's Cross, Hoxton, Shoreditch and many more across the city, creating increased competition.
- Current licensing and planning policy is focused on restriction and curtailment which risks other competitor areas taking market share of audiences.
- The evening and night-time economy has not fully recovered from Covid-related economic impacts; future threats include labour supply shortages, rising costs and reallocation of Arts Council England funding to areas outside of London.
- The lack of a 24-hour strategy for the borough has created a disjointed and stifling approach to the evening economy.
- There is a need to look at the entire economy including all sectors and users, considering infrastructure and provision that removes economic and social limitations and barriers and instead allows the area to operate over an entire 24-hour period.



- Concentration of uses overlapping daytime, evening and night-time, creating competition for the Heart of London area's limited space, which also increases additional pressure on transport services and the public realm, with footways and sometimes carriageways, full of pedestrians.
- Crowding at bus stops and on night buses and insufficient staffing, with usually just the driver, despite the additional challenge posed by night-time increases in intoxicated and aggressive passengers undermines the visitor experience and their willingness to return to the West End. The frequency, reliability and safety of night buses is crucial to night workers, without whom the evening and night-time economy could not function.
- The rise of working from home to over 50% of Heart of London area office workers for part of the week has impacted the size of the near market for after-work activity.
- Night-time staff can feel priced out of the West End due to affordability of public transport, retail goods and hospitality.

# Safety and Security

## Strengths

- HOLBA's dedicated security team My Local Bobby make staff and visitors feel safer and deter, delay and detect crime, enabling a quick response to incidents and emergencies.
- From 2019, when HOLBA introduced My Local Bobby, to 2023, reported crime fell by 4%, while in the Core West End reported crime increased by 17%.
- Businesses receive a quick response and additional support when dealing with shoplifting and other criminal incidents, helping to minimise impact on visitors and staff.
- A strong track record in ensuring that the Heart of London area remains safe during numerous festivals, events and demonstrations, which have increased in frequency in recent years.
- Agreement with the police and the council to share sensitive information to resolve or prevent crime.
- Heart of London area security teams and businesses share a radio network, which facilitates sharing of live information on crimes and antisocial behaviour.
- 50% of people surveyed think the Heart of London area's safety is 'excellent' or 'good'.
- HOLBA provides a coordinated approach, working in partnership with our businesses, the Metropolitan Police, the council and neighbouring BIDs to tackle persistent crime, antisocial behaviour and street nuisance issues.

## Weaknesses

- Survey respondents say that antisocial behaviour is one of the worst aspects of the area at night, having a major impact on its appeal.
- Police funding does not fully take account of visitor numbers, which results in the Heart of London area being significantly under-resourced because our resident population is around 3,000 against 400,000 visitors every day.
- The lack of police presence is compounded by slow response times and low level of enforcement, e.g. offenders being apprehended, charged and successfully prosecuted.
- There are very few Westminster City Council enforcement officers in the West End – who are needed to enforce against breaches in council regulations such as illegal trading, litter-dropping and busking without a licence.
- Residents believe that antisocial behaviour and perception of safety worsens after 11pm.

- Day workers cited safety, crime, violence, rowdiness, street urination, drunkenness, harassment, and perceptions of lack of safety among the worst things about the Heart of London area after dark.
- Antisocial behaviour, women's safety and safety in the public realm after dark were all highlighted as key challenges by visitors and residents.
- 24% increase in rough sleeping in 2023.
- Lack of HOLBA funding to deploy more security staff.
- Police response times not always adequate when requiring assistance.
- Poor security standards can create hazardous environments and put individuals at risk of a range of injuries.
- Leicester Square is highest in our area in terms of volume of notified crimes.

## Opportunities

- Political alignment at the national, regional and local level and manifesto commitments to prioritise crime reduction.
- The appointment of a new Borough Commander could reinvigorate partnership working between the council, the Metropolitan Police, businesses and private security teams.
- A West End CCTV system, with a control room to monitor and respond to incidents, the capability to speak to people on the street and an enhanced street lighting programme would instantly reduce crime and fear of crime.
- The new government have committed to 13,000 more community police and PCSOs, cracking down on shoplifting and more antisocial behaviour measures.
- Training and workshops to empower businesses to deal with external threats to their employees and property.
- Effectively mobilising the Heart of London area crime-gathering database for logging and reporting incidents, which could be used to track trends to predict and prevent future crimes.

## Threats

- Absence of a dedicated strategy for London's West End, resulting in an uncoordinated approach for the area including planning, licensing, digital screens, safety, sustainability, etc. HOLBA has stepped in to identify, fund and deliver strategies which are also available for the council to adapt to help other areas realise their potential.
- There is no Crime and Safety strategy for the West End across both councils.
- Police funding does not fully take account of visitor numbers, which results in the West End being significantly under-resourced.
- International visitor perception that the West End is unsafe at night-time.
- Lack of shared political responsibility and resources between public authorities.

- High visitor numbers make the Heart of London area appealing to opportunistic criminals and organised crime.
- High crime rates and poor perceptions of safety could trigger economic decline, falling property values and job losses.

# Cleaning and Street Services

## Strengths

- The Heart of London Business Alliance funds additional street cleaning services provided by Veolia.
- According to a Keep Britain Tidy Area Survey in 2022, litter and detritus management standards were high and had increased significantly since 2018.
- Heart of London area achieved 92% rating awarded by Keep Britain Tidy (4% higher than the London average and 7% higher than the UK average).
- Regular inspections and repairs of streetlights, benches, signage and public amenities in the Heart of London area ensure that they are in good working condition.
- Support daytime outreach services, which provide a social care response to help those sleeping rough on the Heart of London area's streets to access services and achieve a route away from rough sleeping.

## Weaknesses

- Basic council service provision is insufficient for the area's volume of footfall, traffic and its international status.
- No restriction on waste and recycling operators has resulted in circa 50 companies operating in the West End and not all have ambitious standards of refuse collection and adherence to collection times.
- The area has a 24-hour economy which makes it difficult to clean the streets.
- The recent Keep Britain Tidy Area Survey demonstrates increased levels of graffiti and flyposting.

## Opportunities

- Opportunity to use autonomous vehicles to increase the frequency of street cleaning.
- Increase standards in the council services to meet the area's specific demands.
- Review street furniture, signs and bikes to deliver a programme of improvements to ensure that the Heart of London area is clutter-free.

## Threats

- Absence of a dedicated strategy for London's West End, resulting in an uncoordinated approach for the area including planning, licensing, digital screens, safety, sustainability, etc. HOLBA has stepped in to identify, fund and deliver strategies which are also available for the council to adapt to help other areas realise their potential.
- Exceptional demand on management of the Heart of London area from 400,000 visitors a day, plus events, demonstrations and premieres.

- The lack of an enhanced cleaning regime could deter visitors, potential investors and businesses to the area. This could lead to a drain of visitors choosing other destinations and a consequent decline in property values and economic performance.
- Poor waste management can create negative public health issues.

## Sustainability

### Strengths

- An increasing number of Heart of London property owners and occupiers are making the necessary changes to buildings and their business operations to reduce carbon emissions.
- Partnership working with the council to promote net zero carbon support for businesses and the Sustainable City Charter.
- A pilot programme in the Heart of London area, funded by the Mayor of London and Bloomberg Associates, achieved up to a 22% reduction in energy use amongst participating businesses.
- The Heart of London area is benefitting from new planting schemes which support biodiversity.
- Street cleaning plays a vital role in reducing pollution and improving air quality, reducing particulate matter and contaminated waste from entering storm drains.
- Daily monitoring of environmental issues and reporting these directly into Westminster City Council environmental hotline.

### Weaknesses

- The area has many older buildings which are challenging to retrofit, which is more easily done when a building is unoccupied.

### Opportunities

- A Heart of London area-wide coordinated approach can contribute to the area achieving net zero and supporting sustainability, which is being led by HOLBA, involving businesses and the council.
- The programme of public realm schemes is an opportunity to introduce more trees and sustainable urban drainage to help build climate change resilience.
- The new Labour government has committed to more investment in clean energy and improving energy efficiency in buildings including commercial properties.

### Threats

- Absence of a dedicated strategy for London's West End, resulting in an uncoordinated approach for the area including planning, licensing, digital screens, safety, sustainability etc. HOLBA has stepped in to identify, fund and deliver strategies which are also available for the council to adapt to help other areas realise their potential.
- Changes to minimum energy standards, as measured by Energy Performance Certificates (EPCs) mean that 49% of the St James's District's commercial buildings may not be lettable soon.

- Tenant businesses, staff, visitors and investors increasingly include sustainability in their decision-making, which could affect the area's ability to attract tenants for offices, visitors, experienced staff and inward investment.
- Increasing importance of sustainability rating as a principal factor for businesses choosing where to locate in addition to price and quality. The Heart of London area's buildings' EPC ratings need to improve to maintain the area's attractiveness to current and potential tenants, particularly for the office sector.
- Climate change and extreme weather could affect the ability of businesses to trade and willingness of consumers to visit the St James's area.



## Public and Statutory Services: Council Services

### Strengths

- Westminster City Council is responsible for the collection of business rates in the City of Westminster. As the largest business rate collector in England, it collects over £2 billion in business rates annually, mainly from West End businesses.
- Although just one of 33 rating authorities in London, Westminster collects over 25% of London's £8 billion total. This one local authority collects around 8% of the total business rates in England.

### Weaknesses

- Due to central government redistribution, Westminster keeps just five pence out of every pound it collects. 95% of Westminster business rates are redistributed by central government to be spent elsewhere.
- St James's District businesses paying such substantial amounts of business rates find it hard to reconcile the level of business rates against the standard of services provided.

### Opportunities

- The council retains just 5% of the business rates and council tax that it collects annually. The remaining 95% goes to central government to be spent in other areas. This severely constrains the council's ability to invest in necessary services to meet the exceptional demands of the Heart of London area.
- The new Labour government has committed to giving mayors and other local leaders more say on economic decisions.

### Threats

- Absence of a dedicated strategy for London's West End, resulting in an uncoordinated approach for the area including planning, licensing, digital screens, safety, sustainability, etc. HOLBA has stepped in to identify, fund and deliver strategies which are available for the council to adapt to help other areas realise their potential.
- Without government action, councils face difficult choices about cutting vital services, along with increasing council tax, fees and charges during a cost-of-living crisis.

## Public and Statutory Services: Utilities – Digital

### Strengths

- Westminster is one of the most connected boroughs in London with over half of its total premises able to access full-fibre broadband.

### Weaknesses

- High density of Heart of London area businesses places high demand on digital infrastructure.

### Opportunities

- Develop and deliver a Digital Infrastructure Strategy for the West End, which could include:
  - Supporting the introduction of ultrafast fibre networks to buildings
  - Supporting the introduction of 5G network to the West End
  - Delivering connectivity without interruptions and losses to support the Heart of London area's key sectors, technology use and hybrid working
  - Harness Smart City technologies to better manage crime (see *Safety and Security* section), environmental performance and customer and visitor data
- Provide enhanced digital security through leased fibre lines.

### Threats

- Cybercrimes affecting businesses and inadequate digital security in the West End might lead to businesses relocating to other areas with enhanced digital security.

## Public and Statutory Services: Utilities – Water

### Strengths

- Utilities companies in the West End and St James's have a well-established infrastructure to provide reliable services to residents and businesses.
- The West End has a high population density and many businesses, providing a strong customer base for utilities companies.

### Weaknesses

- Thames Water has an ageing infrastructure. This results in 24% of Thames Water supply (equivalent to 600m litres a day) being lost through leaks; the repair of leaks is disruptive to the Heart of London area road network, impacting on the visitor experience and ability of businesses to trade.

### Opportunities

- Water capture and harvesting can be built into public realm schemes, which would contribute to climate adaptation and resilience.
- Encourage Thames Water to invest in public realm schemes, specifically the water capture elements.

### Threats

- Disruption to water supply due to current leaks and future climate change could affect the reliability of water supply.

## Public and Statutory Services: Utilities – Gas and Electricity

### Strengths

- Utilities companies in the West End have a well-established infrastructure to provide reliable services to residents and businesses.
- The West End has a high population density and many businesses, providing a strong customer base for utilities companies.
- The West End has multiple utilities companies competing for market share, leading to pricing competition.

### Weaknesses

- Some utilities companies have aging infrastructure that could lead to service disruptions and maintenance issues.
- High demand for gas in Heart of London area buildings, and the net zero transition, means these buildings will need to be refitted with alternative, renewable heating and cooking energy sources.
- The busy, complex and multi-layered uses of the Heart of London area's built environment makes it highly challenging to repair utility infrastructure.
- Planned and urgent road works are disruptive and unsightly, affecting the visitor experience and ability of businesses to trade.

### Opportunities

- Collaborate with utility companies to deliver an accelerated buildings retrofit programme.
- Build-in power supply resilience, such as Power Purchase Agreements and on-site micro energy generation, such as solar and wind sources.
- Upgrade utilities as part of public realm schemes, bringing forward their scheduled renewal dates to align with public realm investment.

### Threats

- The growth of the West End economy increases pressure on the power grid, which soon may require further upgrade to its infrastructure, including sub-stations.
- Climate change may cause disruption including loss of power supply or rationing of power at peak times.

## Appendix 2: Consultation Summary

Please see separate document.