

Heart Of London Business Alliance

A proposal for the Renewal and Alteration (of name) of the
Piccadilly and Jermyn Street Property Owner Business
Improvement District 2025-2030

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Introduction

In February 2025, Heart of London Business Alliance (HOLBA) will invite property owners to vote on securing £9.7million of direct investment for the Piccadilly and Jermyn Street District.

The investment will be ring-fenced to deliver an ambitious five-year improvement plan which will address the district's challenges, drive prosperity and garner pride in the community.

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 district.

There is a lot at stake:

- A vote in favour will allow HOLBA to deliver the £9.7million plan over the next five years.
- A vote against will mean the £9.7million investment will be lost; the plan will not be delivered; all projects, services and campaigns currently provided by HOLBA will be terminated; and, the district, after 20 years, will return to basic statutory provision.

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

Heart of London Business Alliance (HOLBA) has been the catalyst for positive, tangible change in London's West End for 20 years.

2020-2025

In 2020, a 98% majority of property owners voted in favour of renewing the Piccadilly and Jermyn Street Business Improvement District for a further five-year term.

They also voted in favour of investing £6.1 million to deliver the five-year business plan for the district. A further £1.2 million was secured via sponsorships and partnerships.

This provided a combined total of £7.3 million of ring-fenced investment that would not otherwise have been achieved and enabled HOLBA to:

- Develop a master plan of street improvements for the district, including design area improvements for Green Park, Piccadilly and its adjacent streets, attract £6.6 million investment, conceptualise a new Arts Quarter and establish a strategic working group for Piccadilly Circus
- Secure funding and commence construction of landscape improvements on Sackville Street and Vigo Street
- Develop a net zero carbon programme, with specific support and inward investment for property owners to retrofit buildings
- Launch a ground-breaking series of area performance reports with monthly updates for members on footfall, visitor behaviour, demographics and a series of insights reports focused on the real estate market in the Heart of London area
- Create and deliver first-of-their-kind visual art initiatives including Art of London, Art After Dark and Scenes in the Square to attract new visitors, showcase the area as a truly dynamic destination and inspire reasons for people to visit and return
- 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.
- Provide My Local Bobby 24/7 security, resulting in crime falling by 4%, compared to a rise of 17% in the Core West End area
- Enhance street cleaning, including pavement washing, stains, chewing gum and graffiti removal
- More than 2,000 people sleeping on the streets received one-to-one support via HOLBA's outreach programme
- Reduced 11,000 tonnes of CO₂ emissions via HOLBA's waste disposal scheme and saved participating members £250,000 via our Waste Collection Scheme.

2025-2030

In February 2025, property owners will have the opportunity to vote on securing £9.7 million to deliver the ambitious five-year improvement plan set out in this document.

Priorities for the Piccadilly and Jermyn Street District will be to:

- Coordinate a single, multi-agency Crime Reduction Strategy for the West End that is fit for purpose
- Complete the Sackville Street and Vigo Street public realm scheme which will encourage footfall from Regent Street to Piccadilly and Jermyn Street District
- Commence the Green Park Gateway public realm scheme
- Contribute to the development of new design proposals to transform Regent Street St James's
- Decrease and better manage pedicabs, dockless bikes and e-scooters to create uncluttered, safer streets
- Reduce carbon emissions from the district's older buildings to deliver a net zero carbon West End, ensuring commercial buildings remain lettable in response to tightening minimum energy standards set for 2030
- Make the case for the Heart of London area to be given special recognition as an International Centre for Culture and Entertainment; this will allow for plans to be coordinated and tailored to allow the area to fulfil its potential, drive investment and contribute to the growth of the London and UK economies
- Collaborate with the world's greatest institutions to allow art and culture to spill out onto the streets for everyone to explore
- Support the area's evening and night-time economy, attract new audiences and give existing audiences further reasons to visit to the area's cultural offer

In addition to the tangible delivery of projects and services, and the direct return on investment, HOLBA will provide the additional benefits of:

- Being a convening force for our members and wider community
- Championing and advocating for changes that will benefit our members and their trading environment
- Leveraging investment for the area and raising its profile
- Elevating the experience of the area for everyone
- Mobilising the business community, keeping them informed, setting standards and helping them to play a part in caring for the wider community

Focus Areas

The improvement plan for the district will focus on five delivery pillars

Shaping Piccadilly and Jermyn Street

- Transforming public spaces
- Net zero
- 24-hour economy
- Inward investment

Managing Piccadilly and Jermyn Street

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

Promoting Piccadilly and Jermyn Street

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

Advocating for Piccadilly and Jermyn Street

- Championing businesses
- Special area designation
- Strategic crime reduction
- Protecting transport passengers
- Reinstating tax-free shopping

Supporting Piccadilly and Jermyn Street

- Dedicated member engagement
- Keeping everyone safe
- Keeping businesses informed
- Area, economy and investment insights

Statement from the Chair and Chief Executive

For 20 years, Heart of London Business Alliance (HOLBA) has been trusted by businesses to unlock the area's full potential and drive its success as a commercial and cultural centre of global significance.

While the demand for statutory services continues to rise, councils across the UK 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 across the UK and threaten London's world-leading reputation.

In 2004, businesses in the West End took matters into their own hands and established HOLBA, a unique vehicle that allows businesses to raise and spend money on improving their area.

This document summarises Heart of London Business Alliance's (HOLBA's) exceptional catalogue of achievements as well as its plans for the next BID term. The area has enjoyed exceptional economic growth of 34% (2017-2021), which is three times that of London as a whole. The strength of the area's performance is testament to HOLBA's work over the past 20 years.

In February 2025, property owners will be invited to vote on securing £9.7 million for HOLBA to deliver the 2025-2030 plan. The plan sets out how it will promote the district's strengths, tackle its weaknesses, capitalise on opportunities and mitigate the threats. These have been thoroughly explored and candidly set out in the SWOT analysis section of the document.

This is the business community's only chance to collectively drive the future of its district. There is a lot to be gained or lost depending on the ballot outcome. Please, take the time to read the proposal and meet with us to discuss your thoughts before casting your vote.

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. Further information about HOLBA can be found in the FAQ section.

HOLBA's sole purpose is to protect and promote the cultural and commercial well-being of the Heart of London area on behalf of the business community.

The Heart of London Area

The Heart of London area, as seen on the map, 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.

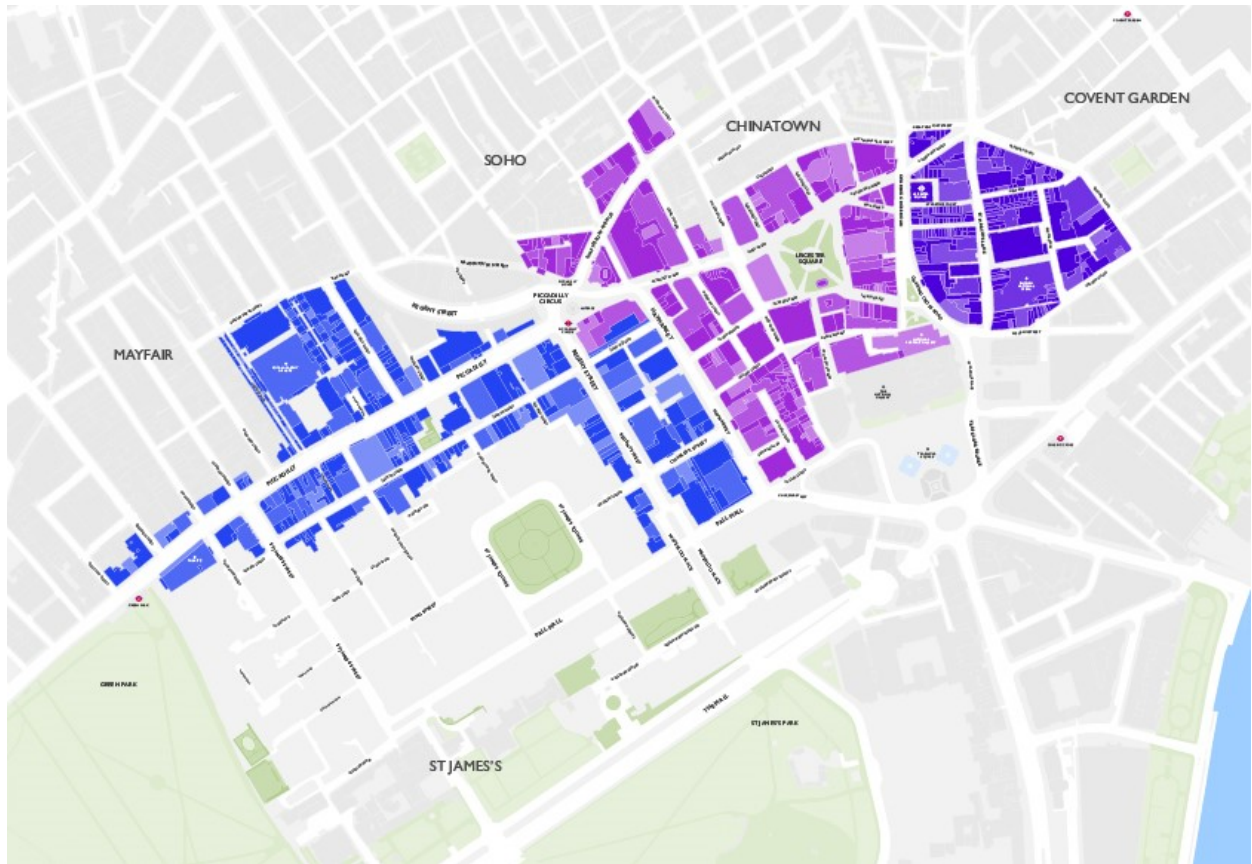
The Heart of London area plays a significant role in the wider London and UK economies. A full set of our bespoke data and insights for the Heart of London area and its districts is available [here](#).

Key highlights include:

- Covers 36.7 hectares of prime London real estate
- Home to over 3,000 people
- Worth £10 billion to the UK economy
- Gross value added per worker increased by 18.1%, compared with London's growth of 6%
- Generates £345 million in business rates
- Boasts a 93.1% occupancy rate for office space and 96.5% for commercial
- 1.8 million square metres of commercial space and 4.1 million square feet of office space across over 3000 units
- Employs over 112,000 people, of which over 47,000 are office based, 19,000 are in hospitality and 5,000 are in retail
- Enjoys 78 global cultural institutions
- Attracts over 158 million visitors per year

The strength of the Heart of London area's performance is testament to the focused and agile work and commitment of Heart of London Business Alliance over the last 20 years.

Heart of London Area Map



The above map shows the districts managed by Heart of London Business Alliance. A list of streets in the Piccadilly and Jermyn Street District can be seen in the Frequently Asked Questions section.

Piccadilly and Jermyn Street District

The Piccadilly and Jermyn Street District is integral to London's West End, situated between Green Park and Piccadilly Circus, with Mayfair to its north and Waterloo Place to the south of Regent Street St James's.

Piccadilly is home to world-famous institutions and businesses, including The Royal Academy of Arts, BAFTA and Fortnum & Mason. Over 50% of commercial space in the Piccadilly and Jermyn Street BID District is dedicated to office use. Piccadilly is benefiting from new mixed-use developments including Sackville House, Nuffield House and French Railway House. Piccadilly's hospitality sector is similarly being transformed, with the extension and refurbishment of The Ritz, the new 1 Hotel Mayfair and recent refurbishment of The Dilly.

Regent Street St James's and Haymarket are home to luxury hotels and restaurants, theatres, offices and more traditional high street businesses that serve the residential and daytime worker markets.

Jermyn Street continues to uphold its reputation as the home to London's finest men's tailors, shirt makers, food and wine merchants, restaurants, hotels and art galleries.

Business Sector Breakdown (Heart of London Business Alliance members)

	Total	% of total
Office	125	52.08%
Retail	69	28.75%
Hospitality	35	14.58%
Education	5	2.08%
Leisure	4	1.67%
Club	1	0.42%
Other	1	0.42%

The Piccadilly and Jermyn Street District Map



The above map shows the Piccadilly and Jermyn Street District. A list of streets in the district can be seen in the Frequently Asked Questions section.

Delivery Plan

This section outlines how, over the next five years, Heart of London Business Alliance (HOLBA) will deliver £9.7 million of improvements to drive growth in the Piccadilly and Jermyn Street District.

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 Appendix 1 and 2 respectively.

Vision for Piccadilly and Jermyn Street District

A 24/7 destination that celebrates and grows the district's world-class cultural and commercial proposition.

The vision will be delivered across five distinct pillars:

- **Shape** – We will revitalise the area, secure its sustainable future and attract new investment, delivering a world-class destination.
- **Manage** – We will create an environment that is clean, safe and well-managed, elevating the experience for everyone.
- **Promote** – We will deliver standout experiences showcasing the West End as the world's most iconic cultural and commercial destination.
- **Advocate** – We will protect, defend and promote our members' interests, listening and campaigning on the issues that matter most.
- **Support** – HOLBA will empower, inform and raise our members' profiles, providing a one-stop shop of support and services to help your businesses 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 HOLBA will address these over the next five years.

Shaping Piccadilly and Jermyn Street

Heart of London Business Alliance (HOLBA) will revitalise the area, secure its sustainable future and attract new investment, delivering a world-class destination.

Looking back (2020-2025)

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

- Secured £1.9m investment to deliver transformational public realm improvements on Sackville Street and Vigo Street
- Reduced carbon emissions by up to 22% from buildings which participated in the Business Climate Challenge
- Successfully made the case for – and delivered – alfresco dining on key streets during the pandemic, saving many businesses from collapse
- Coordinated partners to look at the future of Piccadilly Circus as a place of spectacle and to reimagine Regent Street St James's and Haymarket
- Successfully lobbied for a £1.57billion package to save the arts and culture sector during the pandemic
- Published the West End's first Evening and Night-time Strategy and Action Plan, with over 70 actions to drive the area's full potential.

SWOT Summary

The SWOT analysis highlights that the Piccadilly and Jermyn Street District is an exceptional cultural, architectural, historical and experiential place in which to spend time and do business. However, it faces several challenges and threats, which are summarised here.

Strengths

The Piccadilly and Jermyn Street District's iconic vistas, landmarks, rich and varied fabric, layers of history and architecture all contribute to attracting 36 million visitors a year. It is a world-famous arts and cultural destination with unparalleled theatres and cinemas enhancing its renowned evening and night-time experience.

The area is only 30 minutes from Heathrow, with the Elizabeth line potentially increasing footfall in the area in the coming years. The area's nearest Underground stations – Green Park and Piccadilly Circus – respectively bring 30 and 28 million people a year to the area.

Weaknesses

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

The district 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, digital screens, safety, sustainability and public spaces.

Opportunities

The considerable opportunities to shape the district include: attracting and retaining the pre- and post-theatre and galleries audiences; activating side streets with new cultural and experience offers.

Designating the West End as a special policy area will allow venues to stay open later and a more diverse range of venues to flourish, thereby extending the appeal of the West End to new customers.

Regent Street St James's and Haymarket and Green Park Piccadilly can be transformed into safer, sustainable and more attractive places to walk, cycle or dwell, which would attract additional footfall, create new jobs and increase the district's Gross Value Added.

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

Threats

The district faces significant threats, including climate change, changing consumer tastes, the growth of competitor visitor destinations (for tourism and investment) and competition to secure investment in public realm.

The evening and night-time economy is at risk due to the rise of rival destinations, loss of club venues, lack of live music venues and restrictive licensing policies, which all limit the West End economy's potential and enjoyment for workers and visitors.

65% of the district's commercial buildings need to improve their energy efficiency or risk becoming unlettable by 2027 when minimum energy standards are tightened. This figure increases to 88% of all Heart of London area's commercial buildings in 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 Heart of London Business Alliance (HOLBA) will focus on:

- Transforming public spaces
- Net zero
- 24-hour economy
- Inward investment

Transforming public spaces

Heart of London Business Alliance (HOLBA) will create public spaces and routes that reflect the district's historic character, enhance the quality of its proposition and epitomise its world-class status.

The Placeshaping Strategy identifies a programme of 44 projects which will deliver growth of 14% in employment and 122% in Gross Value Added (GVA) by 2040. Without these projects, growth will be restricted to 5% in employment and 104% in Gross Value Added for the same period.

The Placeshaping Strategy sets out to:

- Provide high-quality public spaces
- Enhance gateways
- Improve side streets
- Reduce traffic
- Create opportunities for spectacle
- Promote uses which can animate upper levels of buildings
- Strengthen night-time experiences through varied and complementary uses
- Appeal to visitors and investors.

There are three projects that will be prioritised over the next five years:

Haymarket and Regent Street St James's

Working with the council and The Crown Estate, HOLBA will reimagine these two key boulevards which currently primarily operate as a traffic gyratory, rather than as places for people to enjoy the West End, its vistas, architecture, culture and hospitality.

Sackville Street and Vigo Street

HOLBA will complete the £1.9 million public realm improvements, with wider footways in high-quality materials and new trees and planting, on this key link from Regent Street.

Green Park Gateway

HOLBA will progress the design work for transformational public realm improvements that will serve as a gateway to St James's from Green Park.

Net zero

Heart of London Business Alliance (HOLBA) has proactively responded to climate change and wider environmental threats, working with our partners including Westminster City Council, the Mayor of London and other Business Improvement Districts (BIDs) to deliver a Net Zero Carbon City.

Over the next five years Heart of London Business Alliance will:

- Provide net zero carbon route maps to support businesses in achieving carbon reduction across all three scope types

- Deliver the HOLBA Net Zero Carbon Strategy and Action Plan, which will help businesses 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%
- Expand retrofit services through the HOLBA one-stop shop, which includes free energy assessments and Energy Efficiency Grants to members via a new Sustainability Toolkit
- Engage businesses in the HOLBA Sustainability Members Engagement Group, which was launched in June 2024 and is a source of support, advice, collaboration and funding opportunities for businesses
- 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 HOLBA member businesses money.

24-hour economy

The Piccadilly and Jermyn Street District offers memorable evening and night-time experiences with an unparalleled culture and entertainment offer. However, the sector has recently experienced a period of turbulence and stagnant growth which threatens its future.

Heart of London Business Alliance's (HOLBA) [Evening and Night-time Strategy and Action Plan](#), published in 2023, was the first of its kind for the West End. It provides an ambitious, integrated and deliverable plan for the West End between the hours of 6pm and 6am. It sets out how the area can meet its full potential and become more inclusive, safe, accessible, attractive and dynamic for everyone.

Over the next five years Heart of London Business Alliance (HOLBA) will:

- Make the case for the sensitive relaxation of licensing rules, where appropriate, and for the creation of a special policy area to encourage the West End economy to grow, facilitate better transport, statutory services and provide a positive framework to protect and enhance the evening and night-time economy
- Encourage a positive planning policy framework to protect and enhance evening and night-time venues and businesses
- Seek to diversify and expand the West End's offer to make it more inclusive while attracting new audiences
- Expand the evening offer and extend opening hours on key streets where the evening economy is limited

- Work across sectors to evolve the West End's offer, creating new experiences to attract new audiences
- Make the case for better public transport provision to ensure that the evening and night-time economy can access both the workforce and visitors it needs to succeed.

Inward investment

The Heart of London area 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 market the Heart of London area as an attractive place to invest in property, a location for office-based businesses and to provide new consumer experiences.

Over the next five years Heart of London Business Alliance (HOLBA) will:

- Actively seek and promote increased inward investment into the district, stimulating economic activity and safeguarding the area's status as a world-class destination
- Develop and promote a compelling narrative for the Heart of London area as a place in which to invest and do business using HOLBA economic reports
- Amplify awareness of the success and future opportunities within the Heart of London area by working on HOLBA's strategic priorities with key partners.

Managing Piccadilly and Jermyn Street

Heart of London Business Alliance (HOLBA) 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 our 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.

SWOT Summary

The SWOT indicates the barriers to, and benefits from, investing in services that make the Heart of London area cleaner, safer, better managed and easier to navigate. They are summarised here:

Strengths

Heart of London Business Alliance (HOLBA) has invested significantly in additional security in Piccadilly and Jermyn Street District, and whilst reported crime has risen by 17% in the central West End, it fell by 4% in the Heart of London area.

Weaknesses

A finite budget and recruitment challenges in the Metropolitan Police Service has resulted in the Service being under-resourced the West End.

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 area under-policed.

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

The impact of over 98,000 visitors per day places disproportionate demands on street services.

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

Film premieres, festivals, events and demonstrations generate peak periods, necessitating an enhanced street cleaning and security provision which is not resourced.

Opportunities

Labour'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 an opportunity to increase the frequency of street cleaning; similarly, the introduction of a monitored CCTV system could contribute to making the district safer.

Threats

Perceptions that the Heart of London area is unsafe, in particular after dark, deter visitors.

Resilience to issues such as extreme weather, cybercrime, protests and demonstrations are increasing threats to businesses and organisations.

High crime rates and antisocial behaviour will continue to harm the reputation of the West End.

Looking Ahead (2025–30)

Over the next five years Heart of London Business Alliance (HOLBA) will focus on

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

Daytime safety

Safety and security of people is fundamental to the district's success. Over the next five years HOLBA will:

- Work with partners to deliver a multi-agency crime-reduction strategy and action plan that is fit for purpose
- Lobby for increased police presence and patrols
- Provide a 24/7 on-street private security team, known as My Local Bobby, which will ensure a visible presence across the district and rapid assistance to member businesses
- Operate increased joint patrols and surveillance with the police
- 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 Westminster City Council
- Collaborate with local police to implement a community policing approach
- Assist businesses to implement anti-theft guidance and prevention measures
- Provide resilience training for employers and their teams, so that we have a coordinated response to unexpected events
- Explore the use of technology-based solutions such as CCTV cameras and facial recognition software to deter criminals
- Review and advise public realm designs to ensure that crime is designed out and safety improvement opportunities, in particular better lighting, are designed in.

Night-time safety

Heart of London Business Alliance (HOLBA) actively supports a safe night out for all, across public and private streets, spaces and venues.

Over the next five years HOLBA will:

- 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

Heart of London Business Alliance (HOLBA) provides daily cleaning and waste management services to enhance the basic provision delivered by the council.

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

Heart of London Business Alliance (HOLBA) are committed to working with our 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 HOLBA will:

- Fund HOLBA's homelessness charity partner Connections at St Martin's-in-the-Fields, which directs support to people living on the streets, assisting those seeking accommodation, mental health, and substance abuse support
- Signpost and refer vulnerable individuals to Street Link for 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 Wi-Fi services to reduce data poverty.

Sustainable management

Over the next five years HOLBA will:

- Provide a preferred commercial waste and recycling supplier scheme with Veolia, maximising recycling, guaranteeing that no waste goes to landfill and contributing to reducing traffic and pollution

- Offer discounted member rates for commercial waste and recycling collection, saving members money
- Migrate the whole fleet of cleaning and waste and recycling collection vehicles to zero-emission by 2026.

Resilience support

Over the next five years HOLBA will:

- Work with partners to deliver measures to protect members and the district from the effects of extreme weather events due to climate change
- Work with specialist agencies to provide support and advice to organisations on cyberthreats and cybercrime.

Promoting Piccadilly and Jermyn Street

Heart of London Business Alliance (HOLBA) will deliver standout experiences showcasing the West End as the world's most iconic cultural and commercial destination.

Looking Back (2020–25)

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

- Published the area's [Arts and Culture](#) Strategy in 2020 which connects businesses and cultural institutions to deliver major new cultural innovations
- Established first-of-their-kind initiatives including Art of London and Art After Dark which create experiences that attract new visitors, showcase the area as a truly dynamic destination and inspire reasons for people to visit and return
- Delivered a new installation as part of London Festival of Architecture to reimagine and encourage footfall to key areas
- 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 in 2020
- Delivered the Take a Moment mental well-being art campaign, reaching over 398m people through a variety of media
- Secured £3.1million of investment for consumer activations through collaborative relationships
- 5.7 billion press reach generated from Art of London projects
- Introduced new festive lights and Ramadan lights to the West End, contributing to celebrating diversity and attracting new audiences to the Heart of London area.

SWOT Summary

The SWOT analysis highlights the rise of competing destinations to London's West End and the importance of not only having a compelling, attractive and accessible offering, but also the need to champion and tackle issues presenting a barrier to residents, tourists, businesses and investors.

Strengths

London has a world-class status, ranking No.1 in the World's Top 100 Cities, ranking top for culture with 4 out of 5 visitors to London drawn by London's culture.

Weaknesses

London is heavily dependent on international tourism (84% of the overnight market). The West End's arts and cultural offer is targeted to an ageing and narrow demographic.

Opportunities

Cultural organisations and artists could collectively activate and promote the district. HOLBA's Arts and Culture Strategy brings businesses and institutions together to deliver pioneering projects that contribute to the consumer and commercial tenant experience. The high-profile brand of the West End could be used to promote cultural activity as a driver for tourism.

Threats

Increased competition from other destinations locally, nationally and internationally puts the Heart of London area at risk. Inflation and the cost-of-living crisis are impacting disposable income from the domestic market. 52% of those surveyed by the Night-Time Industry Association cited financial circumstances as impacting how often they go out. There is currently no economic development strategy or inward investment plan for the West End.

Looking Ahead (2025–30)

Over the next five years Heart of London Business Alliance (HOLBA) will focus on

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

Publicity campaigns

Over the next five years HOLBA will:

- Deliver campaigns to attract international audiences, whilst also promoting the area to employees, residents and domestic audiences for whom London's West End is 'on their doorstep'
- Leverage our arts and culture programme alongside destination marketing to target and attract increasingly diverse audiences
- Amplify the reach and impact of our cultural initiatives through PR and marketing, including HOLBA's destination-focused [Art of London](#), [Discover LSQ](#) and [WestEnd.london](#) channels
- Deliver integrated campaigns with our London-wide partners, as well as international campaigns with London & Partners
- Profile individual members whilst promoting the area as the "go-to" destination for visitors seeking authentic and immersive travel experiences.

Local privilege scheme

Over the next five years HOLBA will

- Encourage more 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 is exclusive to HOLBA members and provides employees across the West End with access to exclusive discounts, offers, giveaways and experiences across the entire area.

Activations, events and attractions – Art of London

Over the next five years HOLBA will:

- Transform the West End into a living gallery through HOLBA's award-winning cultural programme Art of London
- Expand the programme of art trails and installations, connecting our cultural partners whilst also driving footfall and widening appeal
- Explore and deliver new and exciting collaborations and activations to generate profile, creating a “buzz” for the area and the Heart of London area's cultural offering
- Deliver a rolling programme of promotional activities, events and activations linking wherever possible to London's cultural calendar
- Grow and strengthen the Art of London brand through multi-channel promotional advertising and partner collaborations to maximise awareness.

Activations, events and attractions – Art After Dark

Over the next five years HOLBA will:

- Expand Art After Dark to support the area's evening and night-time economy, attract new audiences and give existing audiences further reasons to visit to the area's cultural offer.
- Art After Dark will be delivered twice a year in spring and winter, providing visitors with memorable experiences, further reinforcing its value to the West End's cultural calendar
- Present the Heart of London area's cultural offer as a comprehensive package by collaborating with the area's world-class institutions including The Royal Academy of Art and independent galleries and working in partnership with Greater London Authority, Westminster City Council and leading property owners
- Offer 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

- Promote specially created itineraries for visitors to successfully plan their evening with exclusive dining and drinks offers from the area's hospitality businesses.

Activations, events and attractions – Scenes in the Square

Over the next five years HOLBA will:

- Extend Scenes in the Square, with new statues. This public art initiative has brought together global entertainment giants to create a brand-new, award-winning and free tourist attraction in the Heart of London area

Activations, events and attractions – Festive Lights

Over the next five years HOLBA will:

- Deliver a programme of festive lights on Piccadilly, Leicester Square Gardens and St Martin's Lane. These add vibrancy to our streets, benefiting businesses and bringing joy to workers and visitors
- Work to extend the Ramadan lights, initially launched in 2023 in collaboration with the Aziz Foundation, to attract new audiences, widen the Heart of London area's appeal and create opportunities to increase spend and dwell-time to benefit businesses in the area.

Advocating for Piccadilly and Jermyn Street

Heart of London Business Alliance (HOLBA) will protect, defend and promote our members' interests, listening and campaigning on the issues that matter most.

Looking Back (2020–25)

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.
- Successfully lobbied the council for the licensing of street entertainment
- Successfully campaigned to keep the one-day Travelcard, freeze tube fares and lower the cost of travel 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 Piccadilly and Jermyn Street District at the highest levels of local, regional and national government.

Strengths

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

Weaknesses

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

Opportunities

There is an opportunity to make the case to become a special policy area, with licensing and management of the area that is suitable for a 24/7 world-class destination.

The new Labour government has made a commitment to review the current system of business rates, which adversely affects businesses in the Heart of London area.

Threats

Loss of visitors to destinations with policy and regulatory frameworks that support a vibrant consumer experience.

Looking Ahead (2025–30)

Over the next five years Heart of London Business Alliance (HOLBA) will focus on:

- Championing business
- Special area designation
- Strategic crime reduction
- Protecting transport passengers
- Reinstating tax-free shopping

Championing businesses

Over the next five years HOLBA will:

- Engage with government consultations on business rates and other business issues including proposed changes to employment, planning and environmental laws and regulations to fully represent our members' views and interests
- Advocate for, and represent, the district at the highest levels of local and national government to effect change on the issues affecting businesses and ensuring that the trading environment is as good as it can be, helping businesses flourish
- Deliver a programme of engagement with the Member of Parliament for Cities of London and Westminster
- Work together with the other Business Improvement Districts in Westminster on joint campaigns for the West End
- Champion our members' 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 Transport for London (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
 - BusinessLDN's London Business Improvement District Group
 - Police Ward panels and meetings:

- West End
- Holborn and Covent Garden
- St James's
- Safer Business Network Steering Group
- London Chamber of Commerce Business Crime Forum

Special area designation

Over the next five years HOLBA will:

- Develop and advocate the concept of a Special Area Designation for the Heart of London area, with a tailored, coherent, comprehensive and funded plan across statutory bodies, as an International Centre for Culture and Entertainment.

Strategic crime reduction

Over the next five years HOLBA 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 a dedicated, ring-fenced policing and enforcement patrols.

Protecting transport passengers

Over the next five years HOLBA will:

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

Reinstating tax-free shopping

Over the next five years HOLBA will:

- Campaign to reinstate tax-free shopping because the economy is losing out on billions of pounds following the previous government's decision to remove tax-free shopping in 2020
- Campaign for a fresh set of impact forecasts based on new data to be commissioned either by industry or by government
- Support the campaign led by the Association for International Retail.

Supporting Piccadilly and Jermyn Street

Heart of London Business Alliance (HOLBA) will empower, inform and raise our members' profiles, providing a one-stop shop of support and services to help our member businesses thrive.

Looking Back (2020–25)

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

- A ground-breaking and bespoke series of area performance reports with monthly updates for members on footfall, visitor behaviour and demographics
- 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
- Business 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 in the Piccadilly and Jermyn Street District need support in dealing with crime and antisocial behaviour, as well as guidance in navigating planning and licensing policies.

Strengths

HOLBA is knowledgeable on every aspect of the Heart of London area and its businesses and has good relationships with statutory bodies and other organisations, which is invaluable in resolving issues for members. HOLBA collects performance data and insights, which assist businesses in their decision-making.

Weaknesses

The Heart of London area lacks coordinated services and is suffering from poor management and control measures yet is London's busiest night-time destination. This, compounded by duplication of services, means that 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, the West End is a target area for criminals who target businesses and customers, indulging in shoplifting and theft. Businesses face challenges on several fronts including staff shortages, rising costs and regulatory restrictions.

Looking Ahead (2025–30)

Over the next five years Heart of London Business Alliance will focus on:

- Dedicated member engagement
- Keeping everyone safe
- Keeping businesses informed
- Area, economy and investment insights

Dedicated member engagement

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 HOLBA 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 *Heart of London Club* and encourage staff to enrol to take advantage of the offers available
- Advise businesses on how to challenge highways and licensing issues.

Keeping everyone safe

Over the next five years HOLBA will:

- Provide free training to keep the 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 HOLBA 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 BID services
- Ensure that members' issues are escalated to the relevant authorities and stakeholders, particularly common and repeated issues – HOLBA follow through to tackle and resolve businesses' issues
- Regularly meet with:
 - Westminster City Council Neighbourhood Coordinators
 - Police Ward Panels
 - Transport for London
 - Theatre Watch, enabling sharing of common challenges in the theatre sector.

Area, economy and investment insights

Over the next five years HOLBA will provide exclusively for members:

- A quarterly detailed and insightful overview of key economic indicators for real estate and key market sectors
- A better in-depth understanding of the Piccadilly and Jermyn Street District's and the Heart of London area's performance, sector trends, economic profiles, footfall, sales and occupancy, benchmarked against central London through HOLBA's new Economic and Real Estates insights which are exclusive to members
- Data to track Piccadilly and Jermyn Street District's performance and inform business decisions
- 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 baseline for future reporting.

Frequently Asked Questions

What is a Business Improvement District?

Heart of London Business Alliance is a Business Improvement District (BID). BIDs are business-led, locally funded partnerships that are formed to improve a defined commercial area.

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](#).

Piccadilly and Jermyn Street District Area

The following streets are included in the Piccadilly and Jermyn Street District.

Babmaes Street (part street)	Pall Mall (part street)
Berkeley Street (part street)	Pall Mall Place
Burlington Arcade	Piccadilly (part street)
Burlington Gardens (part street)	Piccadilly Arcade
Burlington House	Piccadilly Place
Carlton Street	Princes Arcade
Charles II Street (part street)	Princes House
Church Place	Regent Street (part street)
Dover Street (part street)	Sackville Street
Duke Street (part street)	St Alban's Street (no longer there)
Eagle House	St James's Market
Eagle Place	St James's Street (part street)
Haymarket (part street)	Swallow Street (part street)

Jermyn Street (part street)	Vine Street
Norris 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 area.

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, it has already invested a total of £42 million of Business Improvement District levy directly into the Heart of London area to address the shared priorities of its property owners as well as occupier members.

How does HOLBA operate?

HOLBA consists of six BID entities: one occupier BID and one property owner BID in each of the three districts. 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?

The 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 HOLBA Board of Directors is unpaid and the liability of each director is limited to £1.

Company representatives on the board include:

- BAFTA
- Hearst UK
- Capital Arches Group
- Delfont Mackintosh Theatres
- Odeon Cinemas
- Criterion Capital

- Old Park Lane Management
- Edwardian Hotels
- Royal Academy of Arts
- Fortnum & Mason
- Soho Estates
- Gascoyne Holdings
- The Crown Estate
- Great Portland Estates
- The Hippodrome Casino
- The Ritz London

How is HOLBA managed?

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

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. It secures and leverages 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 borough of Westminster. Westminster City Council only retains 5% of the money it collects annually, with the remaining 95% going to central government to be spent elsewhere. For more information on council business rates in Westminster visit: www.westminster.gov.uk/contact-business-rates

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 26% real terms cuts 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 threatens 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. 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

Heart of London Business 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. The 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 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 five years from 1 April 2025 to 31 March 2030
- 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 section).

BID Finances

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)

	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	Total
Income							
BID Levy	1,334,130	1,548,290	1,594,739	1,642,581	1,691,858	1,742,614	9,554,212
Other	69,659	10,995	10,995	10,995	10,995	48,495	162,134
Total	1,403,789	1,559,285	1,605,734	1,653,576	1,702,853	1,791,109	9,716,346
Expenditure							
Corporate Communications	84,392	81,074	83,506	86,011	88,591	91,249	514,823
External Affairs	50,943	50,085	51,587	53,135	54,729	56,371	316,849
Placeshaping	210,798	177,205	182,521	187,997	193,637	199,446	1,151,605
Promoting	371,172	335,970	346,049	356,430	367,123	378,137	2,154,881
Managing	444,415	446,832	460,237	474,044	488,266	502,914	2,816,708
BID Renewal	57,852	9,581	9,869	10,165	10,470	67,067	165,003
Core Costs	335,072	243,590	250,898	258,425	266,177	274,163	1,628,325
Contingency	66,707	77,415	79,737	82,129	84,593	87,131	477,711
Total	1,621,351	1,421,751	1,464,404	1,508,336	1,553,586	1,656,477	9,225,905

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 our board.
- Core costs will cover the company's operational costs with the intention of maintaining them beneath the industry benchmark of 20% .

Voting process

This is a renewal and alteration ballot for the name change to Piccadilly and Jermyn Street District and for the programme of activity detailed in this business plan.

If you would like to secure a further five years of dedicated investment in the area and the delivery of this plan, please cast your vote. The voting process is as follows:

1. Notice of ballot issued on 27 January 2025
2. Ballot papers distributed on 10 February 2025
3. Voters cast and return ballot papers by 5pm, 12 March 2025
4. Ballot result announced on 13 March 2025

Making your vote count

At ballot, you are being invited to vote on whether your business would like to secure the proposed investment and programme of delivery for the district.

- A vote in favour will allow HOLBA to deliver the £9.7 million improvement plan over the next five years.
- A vote against will mean the plan will not be delivered; the £9.7 million investment will be lost; all projects, services and campaigns currently provided by HOLBA will be terminated; and the district, after 20 years, will return to basic statutory provision only.

Contact details

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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 Heart of London Business Alliance's (HOLBA) 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 delivery 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 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.
- They 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 to 2019 levels.

Built environment, place and public realm

Strengths

- The West End has an attractive network of streets and lanes, which vary 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 to 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 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 several public realm projects 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.
- 65% of the Piccadilly and Jermyn Street 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, including 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

- Piccadilly and Jermyn Street stations are not fully 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 71million visitors with spending of £1 billion. Completing construction of the Sackville and Vigo Street public realm schemes would encourage some of this footfall onto Piccadilly specifically and the Heart of London area more broadly.
- Changes to Piccadilly Circus must 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 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 £238.4million in gross revenue, accounting for 24% of the total gross revenue across all Society of London Theatre (SOLT) members.
 - Heart of London area theatres attracted audiences of 4.2 million, representing approximately one-quarter of the total attendance for all SOLT members.
- 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.
- Leveraging the high-profile "brand" of the West End would 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 and 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 (ENTE)

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.
- Piccadilly and Jermyn Street District 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, cafés, 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, goods in retail and hospitality.

Safety and Security

Strengths

- HOLBA's dedicated security team My Local Bobby to make staff and visitors feel safer and to deter, delay and detect crime, enabling a quick response to incidents and emergencies.
- From 2019, when HOLBA introduced My Local Bobby, to 2023, crime reported 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 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 said 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 Westminster City 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 area has additional street cleaning services funded by HOLBA provided by Veolia.
- According to a Keep Britain Tidy Area Survey in 2022, standards in dealing with litter and detritus were high and had increased significantly since 2018.
- Heart of London area achieved 92% rating awarded from Keep Britain Tidy (4% better than the London average and 7% better than the UK average).
- Regular inspections and repairs of streetlights, benches, signage and public amenities in Heart of London area ensure that they are in good working condition.
- Supporting 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 operate ambitious standards of refuse collection or 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 demonstrated 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 65% of the Piccadilly and Jermyn Street 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 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 Piccadilly and Jermyn Street District.

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 £8billion 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.
- Piccadilly and Jermyn Street 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 Heart of London area 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.