

Polycentrism & West London Emerging Findings

Centre for London

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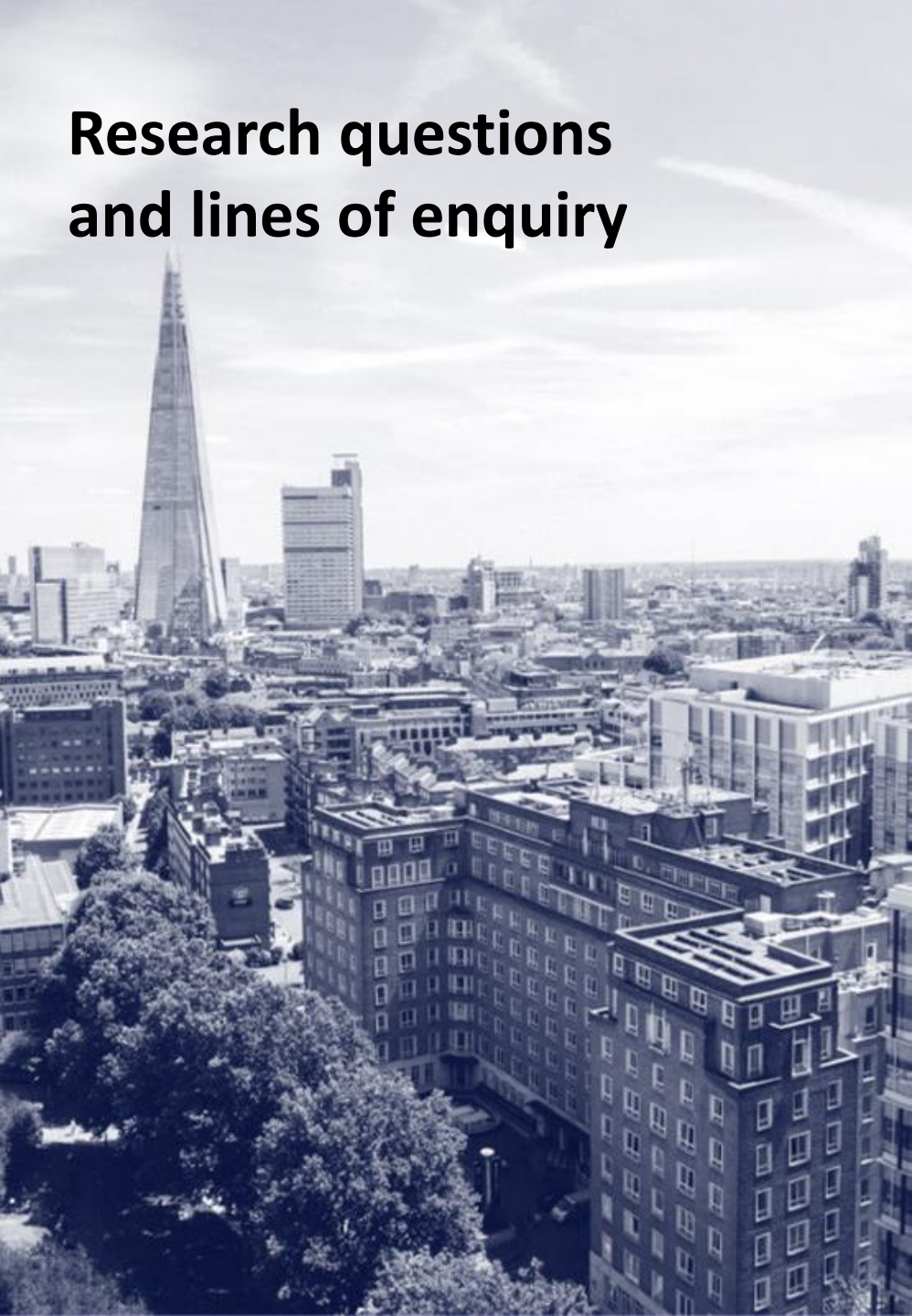
With the generous support of
**London Borough of Ealing
West London Alliance
Imperial College London**

Project Objectives



1. Analyse the current and emerging economic landscape in West London, with a focus on Ealing and comparison with Central London and the Central Activities Zone (CAZ).
2. Identify opportunities for high-growth, sustainable economic development in West London and Ealing, learning from promising models from the wider UK and beyond for potential replication/inspiration.
3. Outline key principles and narrative case for a polycentric approach to growth in London and what is needed for West London to succeed.
4. Outline the economies and diseconomies of agglomeration in London with particular reference to the evolving role of the CAZ and its relationship with emerging growth corridors (e.g. West Tech).

Research questions and lines of enquiry



RQ1. What does polycentric growth mean?

- *What do we mean by polycentric growth – are we talking about an expansion of the CAZ, growth opportunities in outer London or something else?*

RQ2. To what extent is London, specifically within Ealing and wider West London context, already a polycentric city?

- *Are there any indications of dis-agglomeration of the CAZ and how does this vary across different sectors (e.g. office, light manufacturing)?*
- *Are there any examples of other major conurbations with historic and well-established central business districts experiencing dis-agglomeration? What forces are causing this, market-led, infrastructure-led, city policy interventions or others?*
- *How have recent changes to the economy (e.g., Brexit, post-pandemic changes to working patterns), policy interventions (e.g. London Plan, Town Centre Hierarchy, Central Activities Zone), infrastructure investment (e.g. public transport), and development investment reshaped the patterns of economic growth in London?*
- *To what extent does the evidence on the nature, drivers and spatial distribution of Ealing and West London's economic growth and productivity suggest a polycentric growth pattern?*
- *How does this compare to current economic profile of the CAZ?*

Research questions and lines of enquiry



RQ3. What is the potential for more polycentric growth in Ealing and the wider West London context?

- *How can more polycentric growth deliver new plans under the Labour government? (e.g. New Towns, economic growth, new housing targets?)*
- *What are the specific sectors and geographic areas with the greatest potential for future polycentric growth in West London, and what are the key barriers and enablers for realising this?*
- *How might this relate to neighbouring economies (e.g. CAZ, non-London neighbouring local authorities, and home counties)?*

RQ4. What lessons can be learned from cities in the UK and across the globe that have been developed around polycentric growth principles or have polycentric growth strategies in place?

- *How can these be implemented in London, particularly in Ealing and wider West London context?*
- *What can be learned from other London sub-regions and neighbouring non-London local authorities in developing a polycentric approach to local economies?*

Research questions and lines of enquiry



RQ5. How do we enable and capitalise on a more polycentric approach to growth in Ealing and the wider West London context, and what might the benefits be?

- *What should the key elements of a more polycentric economic model for London be, and how should these influence policies related to transport, housing, and economic development at both the city and sub-regional and borough level?*
- *What implications, if any, does this have for the CAZ, and how can a more polycentric approach to growth support the vitality of London as a whole?*

This briefing is intended to...

1. Summarise **emerging findings** from the analysis we have undertaken to date.
2. Prompt **questions** for discussion and insight development.
3. Highlight areas of **further enquiry** and set out **next steps**.

Work undertaken over the last month...

1. **Literature review** – investigating the definition of polycentrism and existing economic policies in the region.
2. **Primary data analysis** – assessing a variety of metrics on business and economy, planning, transport, and population.
3. **Expert Interviews** – gathering insights from sector leaders (e.g. Imperial) and expert voices (e.g. KCL) to better understand the region's nuanced economy and policy environment.
4. **Bi-weekly advisory group sessions** – continuous feedback and input from expert partners at LB Ealing, West London Alliance and Imperial College.

What is polycentrism?

- A city with multiple centres of growth and urban areas with distinct local characters, complemented by development to support those centres rather than as 'enclaves' to growth in the metropolitan centre.
 - **Physical polycentrism**: multiple urban centres within a wider geographical framework or governing structure.
 - **Functional polycentrism**: multiple economic centres of growth which are evenly distributed to support sub-regional development.
- Polycentrism is not solely the existence of growth clusters but **self-sustaining** urban centres in support of a wider sub-regional economy.
- Without an effective and evenly-distributed transport network, polycentrism is harder to achieve. In polycentric cities, deepening regional transport connectivity opens new growth opportunities without creating unintegrated 'new town' style developments.

West London is 'functional polycentrism-ready'.

Unlike the CAZ, West London features multiple centres of economic activity.

This economic geography could disperse growth and economic opportunity more evenly than the CAZ.

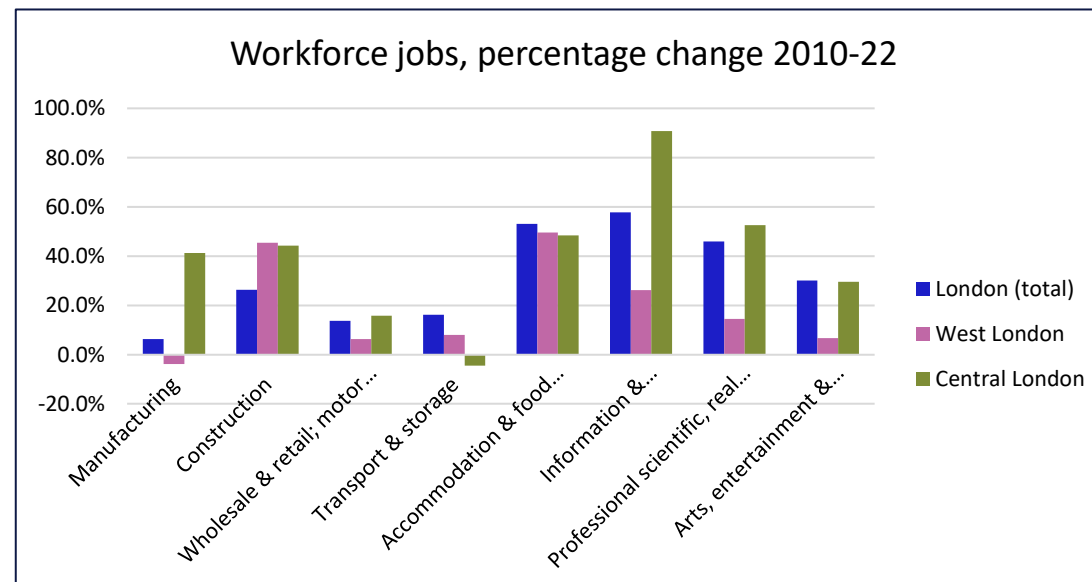
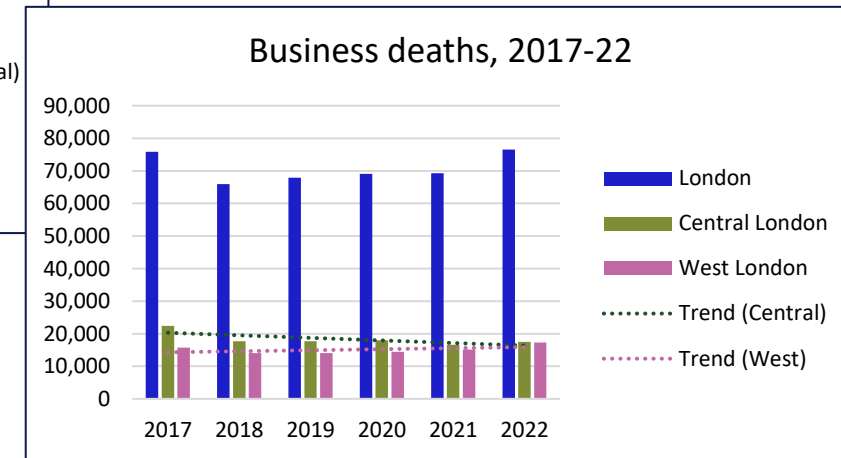
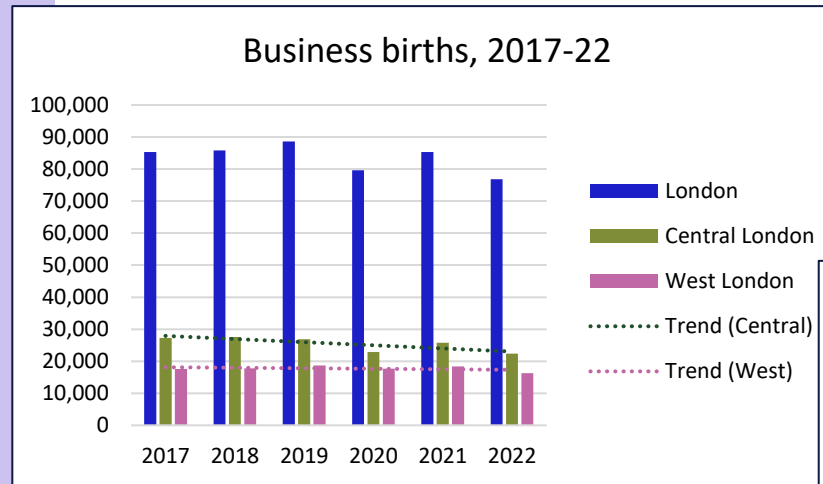


Emerging Findings

West London's strong foundational economy provides resilience, which could lend itself to self-sufficiency.

West London's resilient construction and logistics base has enabled the region to grow consistently despite recent shocks. This contrasts with the CAZ where footfall and consumer activity has heavily determined growth.

Rate of business births and deaths, while lower overall, are also more stable and consistent than Central London.

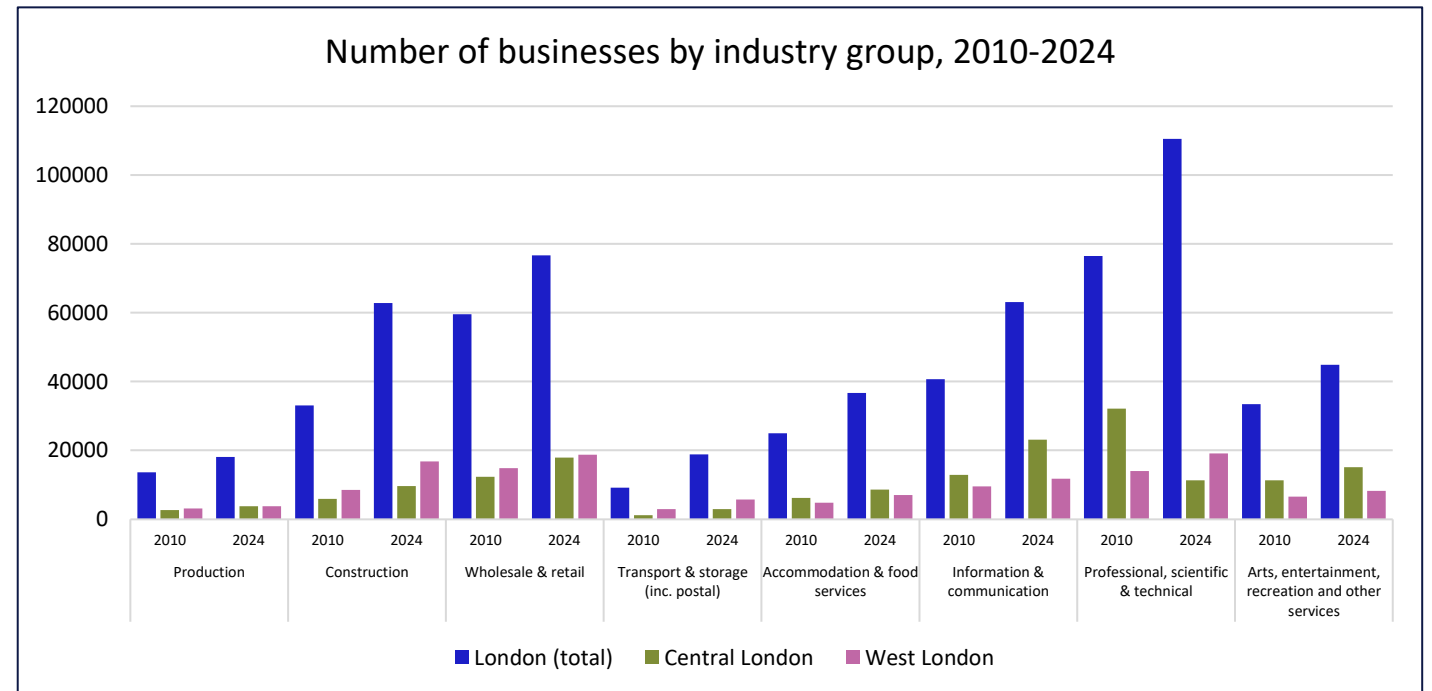
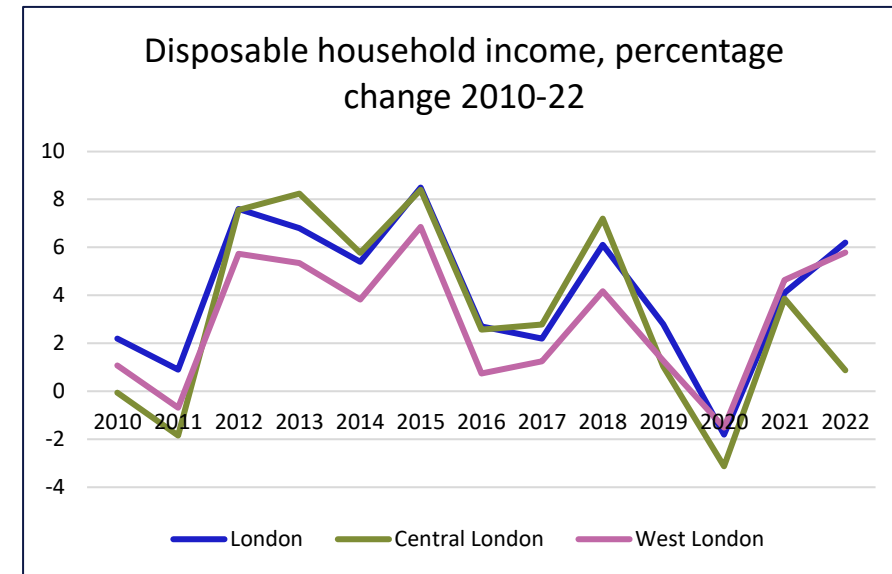
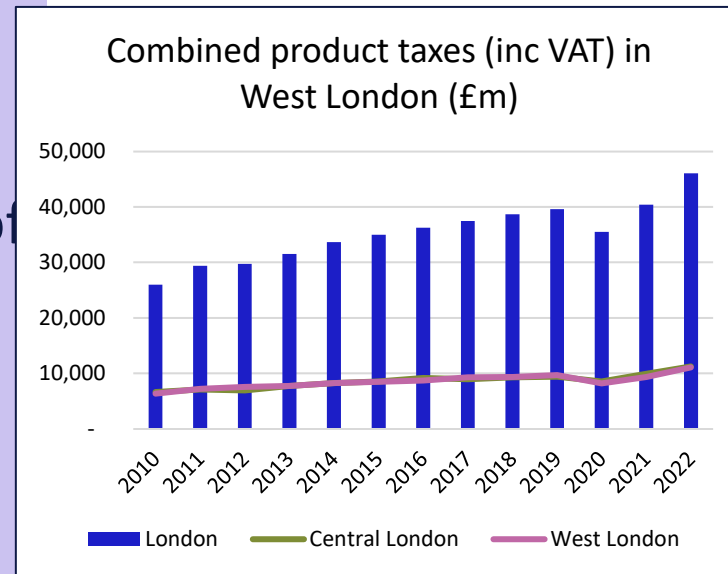


Emerging Findings

West London is outcompeting in key sectors and there are signals of ongoing business strength and rising prosperity.

West London has outcompeted central London in growth in professional, scientific and technical businesses since 2010.

The region has also seen increases in VAT receipts and faster growth in disposable household income than the centre, indicating future potential for further investment and self-sufficiency.



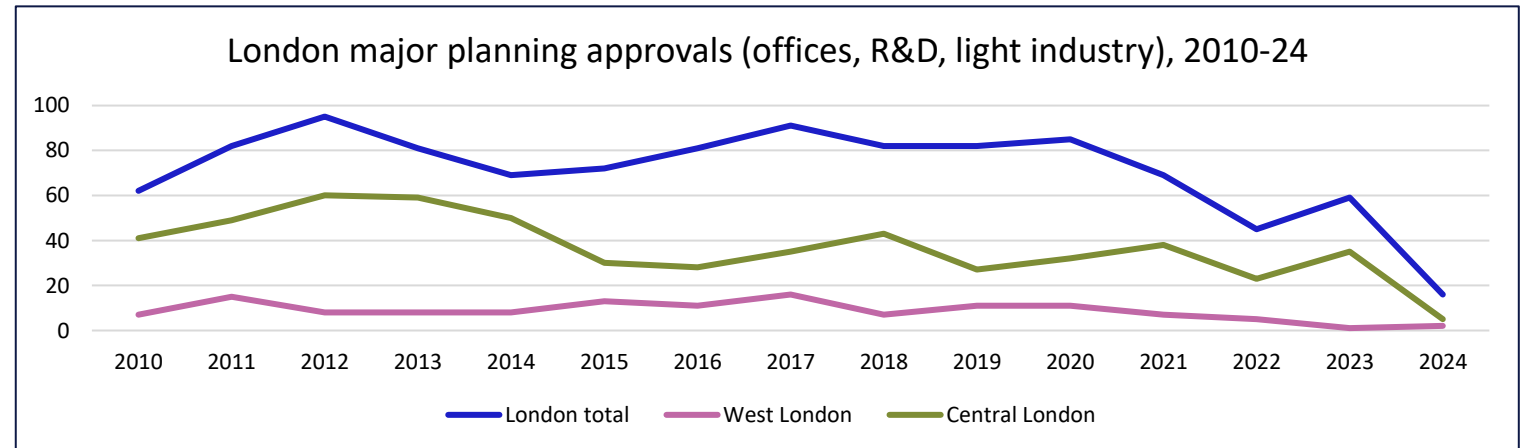
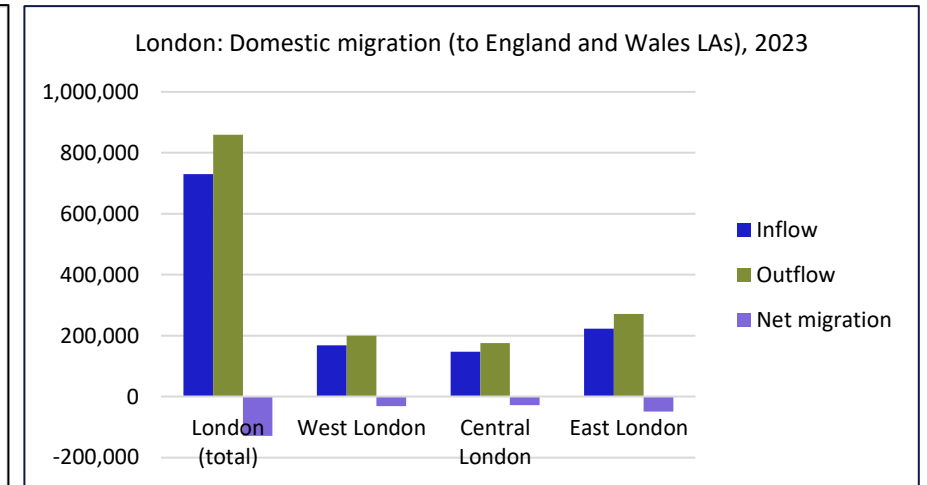
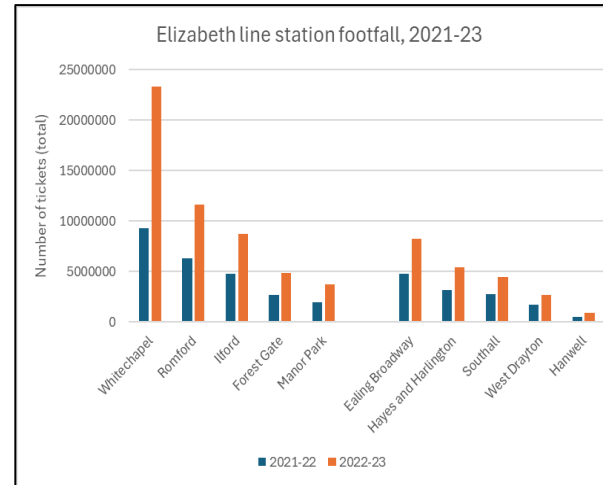
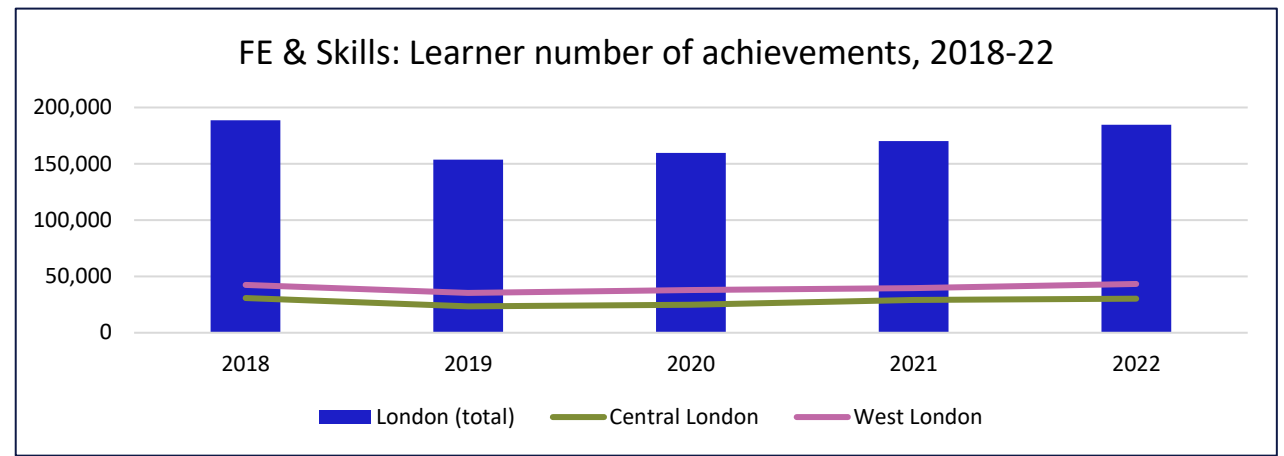
Emerging Findings

There are opportunities to accelerate West London's economy towards 'true' functional polycentrism, but these will require policy action.

Skills and productivity. West London has a strong skills base but isn't converting this into higher productivity currently.

Housing and population growth. West London is densifying faster than the centre, but a low rate of planning approvals and high outward migration could stymie growth.

Transport. West London has benefitted from strong connections to Central London, most recently including the Elizabeth Line, but has not yet been able to reap the same level of mobility benefits as has been the case in East London.





Next steps

Mid-Nov:

- Deeper data analysis, including comparisons with Central London on land value, investment, living standards and deprivation.
- Further interviews with sector experts to build a broader insight into West London's economy and opportunities.

End of November

- Synthesis and write-up of report draft, including international case study detailed comparisons.

December

- Final draft and launch.

Prompts for Discussion and Insight Development

1. How might West London capitalise on its 'polycentrism-ready' economic geography and what role could the **New Towns agenda** and **grey-belt** development play?
2. How can the West London leverage opportunities like the **West Tech Corridor** and large **investment in R&D and Life Sciences** announced in the Autumn Statement to continue to outcompete Central London in professional, scientific and technical business growth? How could the upcoming **London Growth Plan** further support this growth?
3. What role might **regional housing delivery** in West London and the opportunities presented by **planning reform** (e.g. NPPF, new London Plan) play in enabling a more polycentric model for London's economy?
4. How might West London's **transport infrastructure** better drive growth?

