

AFFORDABLE WORKSPACE

EVIDENCE BASE

A report to support the provision of Affordable
Workspace in the City of Westminster
July 2023

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1 Preface

1.1 Preface

This Affordable Workspace Evidence Base report outlines evidence to:

- support the provision of Affordable Workspace in Westminster in accordance with guidance in the Planning Obligations and Affordable Housing SPD and the accompanying Affordable Workspace Informal Planning Guidance Note ; and,
- inform the City of Westminster’s Enterprise Space Programme which is the council’s programme related to investing in and creating new affordable and supportive workspace.

The report relies upon several data sources, including studies to support City of Westminster and the Mayor of London’s policy development, the council’s own planning decisions system and annual pipeline and property industry reports.

2 Executive Summary

2.1 Executive Summary

The City of Westminster’s vision is to deliver a Fairer Economy where people live in a healthy, sustainable and safe environment, can grow and learn throughout their lives, build fantastic careers in world-leading industries, have access to high quality, affordable homes and retire into the community with dignity and pride. Our mission is to improve the lives of those that live in, work in or visit our city. We always put residents at the heart of all we do and also recognise that we are one of many organisations that can make positive changes. That’s why we are committed to working collaboratively with residents, businesses and partners to deliver our ambitious vision. Having the right planning policies in place is crucial in delivering these ambitions.

The City of Westminster is the beating heart of both the London and national economy. Home to world-class business clusters, commerce and culture, learning and research, our diversity contributes to our economic resilience. We have one the largest concentrations of jobs in the UK. Policy looks to promote sustainable growth and deliver economic development so that Westminster remains an unparalleled place to live, work and invest.

The City of Westminster not only needs to generate more workspace in order to accommodate the business growth that will be required to deliver more jobs and greater economic prosperity in the city; but it also needs to ensure the right mix and balance of uses is secured to support a sustainable and diverse economy.

Affordable workspace is an important use of space for supporting a sustainable and diverse economy. The Mayor of London defines affordable workspace as space available for small businesses provided at below market rates for a specific economic, social, or cultural purpose such that small businesses can afford the space without suffering undue hardship. As set out in Policy 13 of the City Plan 2019-40, the City of Westminster recognises the role of affordable workspace in supporting small start-up businesses, supporting the growth of small businesses and enhancing job opportunities.

This report demonstrates the need for more affordable workspace in the City of Westminster. It highlights the type of affordable workspace that the city needs to achieve maximum benefits for entrepreneurial residents, start-ups, small businesses and enhancing job opportunities for people looking for employment within start-ups or small businesses.

Benefits of affordable workspace:

- animates developments, injecting dynamism to sites
- gives much needed help for residents becoming self-employed
- enhances job opportunities in areas of deprivation
- adds value to Westminster’s life changing regeneration programmes
- makes constructive use of physically challenging parts of sites
- retains and gives opportunities to cultural organisations
- contributes to Westminster’s diverse, balanced and mixed economy
- supports and adds to the character and vitality of areas
- delivers future long-term tenant opportunities
- helps attract larger businesses to developments

3 Case Studies

3.1 Affordable Workspace Case Studies

Paddington Works



Launched in 2019, Paddington Works is a flexible workspace and training centre focussed primarily on creative and tech start-ups with over 200 desk spaces. The landlord and operator both invested in the fit out. Major adaptations were required to make it fit for purpose, the learning from which has informed the affordable workspace informal planning guidance note. Through planning obligations over an 80-year period, some of the space is rented to the workspace operator at 60% below market rent, which in turn is provided at below market rates to small businesses. Paddington Works runs a scholarship programme for local entrepreneurial residents to increase accessibility to the space as well as hosting a range of business support events, some of which are free or low cost to local residents. Community groups have also made use of the venue for events and training.

Lisson Arches



Anticipated practical completion in 2023, Lisson Arches will be a council mixed use development in Church Street ward that will provide over 11,000 sq. ft of high quality, flexible, creative production space. A 15-year lease and services contract opportunity will be competitively and openly marketed in 2023 to managed workspace provider. Planning obligations with an obligation period of 80-years include leasing the space to an operator at 70% below market rent. The council and the operator will agree and work together on activity that will contribute to the Church Street regeneration programme such as through giving new skills, employment, and entrepreneurial opportunities for local residents.

Taxi House, Westbourne Park



Taxi House received planning permission in 2020 for a mixed-use development in Westbourne Ward which included 11,500 sq. ft. of workspace, 50% of which is space for any industrial process (which can be carried out in any residential area without causing detriment to the amenity of the area). 20% of the workspace (c. 2,300 sq. ft.) will be affordable. Planning obligations set out that the affordable workspace will be no higher than 80% of market rates to end users (inclusive of reasonable and proper service charges which shall be directly applicable to the space). Furthermore, 75% of the affordable workspace needs to be for local residents and businesses. An operating plan will be agreed with the council that will set out the strategy for letting and sub-letting of the affordable business space. This development will contribute to addressing a much sought after need for affordable workspace space in the local community.

4 Evidence Base

4.1 Evidence Base

Loss of affordable workspace

City of Westminster (2021-22) Authority Monitoring Report

In the most recent evaluation period there was a net loss of over 137,000 sqm of Class E floorspace under construction in the city. This net loss of implicitly includes a loss of workspace suitable for small businesses through the redevelopment of lower grade commercial premises, including through permitted development rights which have seen some such stock converted to residential.

RICS (2018) Assessing the impact of extending permitted development rights to office-to-residential change of use in England¹

Research undertaken by the RICS in 2018 considered the impact of PDR and the loss of commercial space to housing, highlighting the economic and community impacts arising from the loss of secondary and tertiary employment space. This report showed that London had lost 7.5m sq. ft of office accommodation to housing through PDR alone. Significantly, 39 percent of the affected floorspace was occupied at the time that prior approval (for change of use) was granted. Much of the space lost in existing communities, whilst contributing to housing delivery, has significantly contributed to the decline in cheaper employment space.

Demand for office space

Savills (2020) Office Fit Adapt, Evolve, Improve²

In a survey by Savills, 89% of respondents believe the office will remain a necessity. The report acknowledged that the office is important in fulfilling the broader dimensions of work but noted that desk space densities may decrease as office space is reconfigured. In a survey year later, 87% of the respondents believe the physical office will remain essential, in line with the 89% recorded at the start of the pandemic, suggesting attitudes towards the office have remained broadly consistent.

Instant Group (2022) UK Flex Market Review³

The pandemic has triggered changes in behaviours, and employees now have more choice over how and where they work. This is boosting demand for flexible workspace, which is up 22% year on year across the UK in 2021. London remains a strategic business location for many, but the pandemic has eroded the geographical boundaries of work resulting in growing number of businesses looking to capitalise on the lower real estate and people costs in regional cities. Whilst some areas of London are still very much in recovery, central areas like West End are seeing demand levels return and as result desk prices are rising significantly. In 2021, the fight for increasing occupancy came with a lower price tag per workstation, with operators lowering prices to counteract the drop in demand. However, rates are moving in line with demand and returning to pre-pandemic levels.

Savills (October 2022) West End Office Market Watch⁴

Despite rising cost pressures, occupational demand continues to remain strong. Year to date take-up is up 19% on the previous year. Vacancy rates remains at 6.1% which is notably below the Mayor of London's availability rate threshold of 8% (as set out in the GLA (2017) London Office Policy Review). Despite overall supply rising, this indicates that demand for space continues to remain strong, resulting in instability for occupiers, rising rents and narrowing of accommodation options; all of which constrains growth for small businesses.

Major barriers to small business growth

City of Westminster (2020) Local Economic Assessment

The vast majority (96.7%) of the City of Westminster's 51,410 businesses are small businesses (1-49 employees) or micro businesses (0-9 employees). Specifically, 43,460 businesses (84.5% of Westminster's total) are micro businesses, and these

1 Impact of extending development rights to office-to-residential change (rics.org)

2 https://pdf.savills.com/documents/Savills-Office-FIT-Survey-Results_.pdf

3 <https://www.theinstantgroup.com/media/1624/uk-market-summary-2018.pdf>

4 https://www.savills.co.uk/research_articles/229130/335013-0

tend to be located in the residential areas in north and southern parts of the city. Whereas the small businesses more generally, are located primarily in the central activity zone, but also in the NWEDA.

London Councils / London Chamber of Commerce and Industry (2019) London Business 1000⁵

In a survey undertaken by ComRes of 1,000 businesses it was found that the lack of the availability of affordable workspace was cited as a major barrier to growth, with around one in three business leaders highlighting this concern consistently across London's sub-regions. Nearly half of London businesses (46%) identified increased property costs as among the top three factors that would impact most on profitability, rising to 51% in Central London.

GLA Economics (2020) Evidence Base for the London's Local Industrial Strategy – Final Report⁶

Diversity is one of London's economic strengths. The high costs of doing business in London could adversely affect the diversity of London's economic base in terms of SME growth and- at least at the margin- its competitive position. The evidence base cited Savills (2018) Live/Work Index which highlights that London is the most expensive place to accommodate workers in Europe, and the third most expensive in the world (after New York and Hong Kong).

Future for London (2017) Workspaces that Work⁷

Qualitative study of several workspaces across London that highlighted that rent affordability is a headline issue for SMEs. In addition, it was noted that business rates relief, sharing management overheads and allowing flexibility in contracts can have as much of an impact on SME costs as rent. With affordable space in short supply, it's important to have clear and fair mechanisms to choose who can benefit from it.

Tech Nation (2018) Tech Nation Report 2018⁸

One of the main challenges faced by the UK's tech firms is accessibility of affordable workspace. 42% of respondents to the Tech Nation survey rated positively their access to affordable workspace, with firms in London, particularly negative about the availability of suitable office space.

GLA (2019) Cultural Infrastructure Plan⁹

Creative communities are being priced out of most parts of London, such as Soho, resulting in creative people and organisations often leaving London. Furthermore, permitted development rights have resulted in the loss of many creative businesses. Without affordable workspaces, which support emerging talent and incubation of ideas, London and Londoners will lose their rich opportunities for culture and the creative industries.

Local Demand for Affordable Workspace

City of Westminster (2020) Quarterly Business Survey

In the October 2020 quarterly business survey, 61% of 376 business respondents said that affordability of premises was a serious barrier for their business, and 22% said affordability of premises was a minor or moderate barrier. It's worth noting that 81% of the survey's respondents rent their premises.

City of Westminster (2023) Business Unit Enquiries

The City of Westminster regularly receives enquiries for affordable workspace, that are then passed to affordable workspace providers in the City of Westminster where possible.

Last year, the Business Unit received 15 direct enquiries from entrepreneurs and businesses looking for office space in Westminster, majority of which are from businesses looking for flexible, low-cost workspace.

In addition, last year the Enterprise team also received enquires from 8 businesses looking for affordable workspace in Westminster, out of which, one of them is an existing operator that already manages a 7,500 sq. ft of workspace in the city and is now looking for a bigger space. The enquiries range from start ups looking for 1-2 desks up to 10,000 sq. ft of enterprise space.

5 <https://www.londoncouncils.gov.uk/download/file/fid/25358>

6 <https://www.london.gov.uk/sites/default/files/lis-evidence-base-final.pdf>

7 <https://www.futureoflondon.org.uk/wp-content/uploads/delightful-downloads/2017/11/Workspace-that-Works-report-WEB-270317.pdf>

8 <https://35z8e83m1ih83drye280o9d1-wpengine.netdna-ssl.com/wp-content/uploads/2018/05/Tech-Nation-Report-2018-WEB-180514.pdf>

9 https://www.london.gov.uk/sites/default/files/cultural_infrastructure_plan_online.pdf

During the preparation of guidance on affordable workspace, the Enterprise team has also received feedback from the existing operators of their experience within Westminster.

At PopHub Leicester Square, they have reported significant demand for low-cost enclosed studio units, low churn rate and extremely brief void periods. High demand for partially enclosed and open-plan units with similarly low churn rate. Moderately high demand for desk-based memberships- higher churn rate and requires regular and active promotion. Demand for studio units (enclosed/open-plan) is exceptionally high from creatives and small businesses who need physical space to store materials, manufacture bespoke products, create artworks, build teams to deliver services, and provide workshops and classes for customers and training for staff. Demand for desk-based memberships at PopHub comes mainly from the creative sector with 46% of desk-based members freelancers in the arts and design. 30% of desk-based members are registered charities or social enterprises, with the remaining members SMEs or micro-businesses.

Occupancy rate at PopHub is currently at around 95% which has been fully rebounded since the pandemic.

Another operator has reported occupancy rate at around 90% and demand for flexible space as very strong. They have highlighted that margins have been reduced significantly because of the following reasons:

- Utilities cost increasing
- Labour cost/salaries increasing
- High business rates charge
- Companies are using the offices 3-4 days per week (instead of 5 days) and therefore asking reduced rates

Impact on Westminster's strategic position

British Council (2020) How others see us: Perceptions of the UK abroad¹⁰

Research conducted by Ipsos MORI on behalf of the British Council including a survey of 20,612 people aged 18-34 year finds the UK to be within the top 5 most attractive and trusted among young people in the G20. This matters those who trust in the UK are almost twice as likely to say they intend to do business/trade with the UK. An attractive, trusted UK will find it easier to make trade deals and build the necessary international alliances to respond to global challenges like COVID-19 and climate change.

Westminster Property Association (2022/23) Annual Report

The West End continues to be a hotspot, with Grade A office space commanding a higher rent in the West End than other locations, with Knight Frank finding that prime headline rent in the core West End is 67% higher than the City and Southbank. 2022 was a record year for high value office take-up in the West End according to CBRE. The West End's vacancy rate is also far lower, at 4.4%, than its global peers, according to the London Property Alliance's Global Cities Survey.

Benefits to residents and communities

Westminster Property Association (2020) The Future of Westminster Post Covid-19: Planning for Recovery¹¹

This report recommends a 10-point plan to support economic recovery which includes: business support at a local and national level targeted at businesses and sectors which need most help; and greater support for sustainable office development, recognising 18 jobs in retail, leisure and hospitality are sustained by every 100 office workers.

Regus (2019) The Flex Economy¹²

The average flexible workspace generates 218 new jobs of which 121 jobs are based in the local community. Specifically: temporary jobs are created to fit-out existing office space and prepare it for its new role as a flexible workspace; permanent jobs are created to run the space including receptionists, cleaners, maintenance and security staff; and jobs are attached to the businesses that occupy the flex space. The presence of a workspace – its employees and its clients – stimulates local economies through local business procurement activity for services, such as utilities, security, cleaning, catering and maintenance. A flexible workspace can help boost local property markets. It does this by increasing demand for modern, flexible workspaces and catalysing construction of office developments. What's more, by encouraging the growth and expansion of local businesses, a workspace can also potentially further boost the market for expansion and grow-on space. An individual flexible

10 <https://www.ipsos.com/ipsos-mori/en-uk/how-others-see-us-perceptions-uk-abroad>

11 https://www.westminsterpropertyassociation.com/wp-content/uploads/Future-of-Westminsterv2_added-16.11.2020.pdf

12 <https://assets.regus.com/images/nwp/the-flex-economy-report.pdf>

workspace will generate \$16.47 million per annum in GVA. Of this, factoring in leakage and displacement, an average of \$9.62 million would be expected to be retained by local economies on an annual basis.

Arup (2018) Good Growth for Central London¹³

Reserving a certain portion of new commercial stock for local start-ups, social enterprises, or third sector organisations might be a way of strengthening linkages between residential communities and

businesses – perhaps with an emphasis on less well-off parts of the community.

Future for London (2017) Workspace that Works¹⁴

Qualitative study of several workspaces across London that highlighted regeneration benefits including: activating unused spaces; providing opportunities for learning, work experience and apprenticeships; providing business support, both formal and informal; providing space for charities and social enterprises bringing activity to underused buildings or high streets, or to sites awaiting development; supporting economic sectors which are underserved by the property market; and, working with local institutions (colleges, universities, major employers) to provide pathways for employment or developing businesses.

JLL (2020) Affordable Workspace – a challenge for UK Tech¹⁵

The UK performs worse than its European rivals in the affordability of workspace. The cost of office space in London continues to exceed any other European tech hub. Some firms manage this high cost through basing themselves in flexible workspaces, which is particularly helpful for enabling the firms to scale up their commitments on amount of space to hire as their businesses grow.

North Westminster Economic Development Area

Instant Group (2019) The Global Flex Market¹⁶

A trend of flexible workspaces to moves beyond its traditional base in the West End and City Fringe to establish bases elsewhere across the UK capital as a result of the impact of the high cost of property in the West End and City Fringe.

13 https://www.london.gov.uk/sites/default/files/20181129_gla_wcc_wegg_arup_final_report_released.pdf

14 <https://www.futureoflondon.org.uk/wp-content/uploads/delightful-downloads/2017/11/Workspace-that-Works-report-WEB-270317.pdf>

15 <https://www.jll.co.uk/en/trends-and-insights/workplace/affordable-workspace-a-challenge-for-uk-tech>

16 <https://www.theinstantgroup.com/en-gb/breakthrough-insights/industry-insights/uk-flex-market-review-2022/>

4.2 Strategic Alignment

National Policy

HM Government (2018) UK Industrial Strategy¹⁷

Strong local economies around the world tend to have land available for homes, offices and factories. In some areas the constraining issue may be land supply. Policies should therefore match local needs.

National Planning Policy Framework¹⁸

Significant weight should be placed in planning policies and decisions on the need to support economic growth – allowing each area to build on its strengths, counter any weaknesses and address challenges of the future. Planning policies and decisions should recognise and address specific locational requirements of different sectors. This includes making provision for clusters or networks of knowledge and data-driven, creative or high technology industries.

Regional Policy

Mayor of London (2021) London Plan¹⁹

The London Plan encourages affordable workspace in new developments.

Policy CG5 ‘Growing a Good Economy’ states that reasonably-priced, good quality employment space will be needed across London to strengthen London’s economy for the future. It says that those involved in planning and development must plan for sufficient employment and industrial space in the right locations to support economic development and regeneration.

Policy E1 ‘Offices’ puts forward that unique agglomerations and dynamic cluster of world class cities and other specialist functions of the central London office market, including the Central Activity Zone should be developed and promoted. It states that development proposals should take into account the need for lower cost and affordable workspace (see Policy E3).

Policy E2 ‘Providing Suitable Business Space’ requires that the provision, and where appropriate, protection of a range of low-cost B1 business space should be supported to meet the needs of micro, small and medium-sized enterprises and to support firms wishing to start-up or expand. And, that development proposals for new B1 business floorspace greater than 2,500 sqm (gross external area) should consider the scope to provide a proportion of flexible workspace suitable for micro, small and medium-sized enterprises.

Policy E3 ‘Affordable Workspace’ states that in defined circumstances, planning obligations may be used to secure affordable workspace at rents maintained below the market rate for that space for a specific social, cultural or economic development purpose. The policy lists the defined circumstances as follows:

- for specific sectors that have social value such as charities, voluntary and community organisations or social enterprises;
- for specific sectors that have cultural value such as creative and artists’ workspace, rehearsal and performance space and makerspace;
- for disadvantaged groups starting up in any sector;
- supporting educational outcomes through connections to schools, colleges or higher education; and,
- supporting start-up and early stage businesses or regeneration.

Policy E3 also provides guidance for borough development plans and Section 106 agreements, such as: acknowledging the role of workspace providers in delivering affordable workspace; and, that leasing or transferring of space to workspace providers should be at rates that allow providers to manage effective workspace with sub-market rents and fulfilling the affordable workspace purpose over the long term.

Mayor of London (2018) Economic Development Strategy for London²⁰

17 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/664563/industrial-strategy-white-paper-web-ready-version.pdf

18 <https://www.gov.uk/government/publications/national-planning-policy-framework--2>

19 https://www.london.gov.uk/sites/default/files/the_london_plan_2021.pdf

20 https://www.london.gov.uk/sites/default/files/economic-development-strategy-2018_1.pdf

A range of different types of workspace will be needed to accommodate the growth in London's businesses from those just starting up to those that are growing and in need of new premises. This mix will include affordable workspace- which maintains rent below market rate for specific socio-economic purposes- low-cost workspace, and secondary and tertiary business space available at low rent levels. The Mayor wants to ensure there is adequate business space at competitive rents across the capital, recognising the competing demands for space. He will therefore work with partners to identify innovative models that deliver genuinely affordable workspace through permanent and meanwhile spaces.

City of Westminster Policy

Fairer Westminster²¹

The council's vision for the City of Westminster is to build a more inclusive city that celebrates its diverse communities, and where residents, workers and visitors from all backgrounds will feel welcome and safe. A city where small businesses are supported to grow and remain, whilst our local high streets are prepared to face the future, becoming more vibrant and accessible, at the heart of communities. The council's mission is to nurture a sustainable and strong economy that delivers inclusive growth and increases residents' share in the city's economic success whilst supporting Westminster's unique role in London and the national economy. The Fairer Westminster Strategy has five main ambitions, which will be used to support council's decision-making: A Fairer Council where everyone feels heard and represented; A Fairer Economy that gives everyone chance to succeed; A Fairer Environment where futures are cleaner, brighter and secured; A Fairer Housing that provides better living conditions for all; and Fairer Communities that tackle inequalities and celebrates our diversity.

Westminster City Plan 2019-40²²

City Plan 2019-40 encourages but does not require affordable workspace in developments. Specifically, the council will generally support affordable workspace proposals throughout the commercial areas of the city and will specifically support proposals in the NWEDA and the Church Street/Edgware Road Housing Renewal Area.

Policy 5 'Spatial Development Priorities: North Westminster Economic Development Area' puts forward that the regeneration of NWEDA over the Plan period will deliver increased job opportunities, particularly for local residents. It states that this will include 'the protection of existing employment floorspace, and the provision of additional employment and commercial floorspace, in particular that which is suitable for small and medium enterprises (SMEs) and / or helps diversify the local economy.

Policy 13 'Supporting economic growth' states that proposals involving the provision of affordable workspace will generally be supported throughout the commercial areas of the City, and specifically supported in the North Westminster Economic Development Area and the Church Street/Edgware Road Housing Renewal Area. The policy acknowledges the role of workspace providers in delivering affordable workspace and the role of affordable workspace in supporting the growth in small start-up businesses and enhancing job opportunities in areas of deprivation.

Policy 18 'Education and skills' states that major developments will contribute to improved employment prospects for local residents. In accordance with the council's Affordable Housing and Planning Obligations SPD' and that this will include 'financial contributions towards employment, education and skills initiatives'. Affordable workspace is one of the council's established approaches to creating new employment, education and skills opportunities.

Our Plan for the Fairer Economy 2023-2026²³

In June 2023, the council published its Plan for a Fairer Economy. Its vision is to support small and micro businesses, particularly those that are underrepresented, are nurtured to start, grow and succeed. There remain significant challenges for small businesses such as high barriers to entry, particularly in Westminster, as it is the most expensive place to do business in the UK, featuring high rates and commercial rents. The lack of affordable workspace and flexibility around leases and short-term arrangements continue to be a barrier for startup and business retention. This is impacting businesses in sectors such as the creative industries which are being priced out of Westminster.

The council's plan is to create more inclusive and affordable workspace for small and medium sized business, where possible, using its own assets and use the Planning system to promote the protection of employment space and secure more affordable workspace for small and medium sized business, such as under-represented artists and creatives.

Westminster's Enterprise Space Programme

The City of Westminster aims to lead by example in relation to affordable workspace within its Enterprise Space Programme.

²¹ <https://www.westminster.gov.uk/our-new-strategy-build-fairer-westminster>

²² <https://www.westminster.gov.uk/cityplan2040>

²³ <https://www.westminster.gov.uk/fairer-economy>

Since 2009 the City of Westminster has been catalysing the creation of new enterprise spaces which offers small businesses affordable premises, flexible lease lengths, proactive business support (such as access to finance markets, mentors, and skills), a thriving business community and also provides workspace for local residents with entrepreneurial aspirations. This is achieved by transforming vacant and underused sites or developing new space across the city where small, local businesses can start up and grow. The council directly supported the establishment of 12 enterprise spaces to deliver around 200,000 square feet of enterprise space, 10 spaces of which are still in existence and accommodating an estimated 600 businesses, which represents approximately 1% of the City of Westminster's business count. On the whole, these enterprise space would not exist without the council's efforts.

Going forward the council is actively progressing the establishment of several new flagship enterprise spaces mainly through repurposing council assets or building new spaces with a committed capital programme budget. These enterprise spaces will accommodate a further estimated 550 businesses which could result in the enterprise spaces catalysed by the City Council being home to approximately 2% of the City of Westminster's businesses.

This Evidence Base document will be used to inform and guide the council's Enterprise Space Programme.

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