



THE EVOLUTION OF LONDON'S BUSINESS IMPROVEMENT DISTRICTS

Report

March 2016





Future of London is an independent not-for-profit urban policy network focused on the challenges facing regeneration, housing, infrastructure and economic development practitioners in the Capital. We are a borough-led membership organisation with a number of external partners, which provides top career development, expert-led policy research, and topical networking and speaker-led events.

Future of London

70 Cowcross Street
London, EC1M 6EJ

futureoflondon.org.uk

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Rocket Science UK Ltd.

70 Cowcross Street
London, EC1M 6EJ

rocketsciencelab.co.uk

[@_RocketScience_](https://twitter.com/_RocketScience)

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LONDON
ENTERPRISE PANEL

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1 INTRODUCTION

Like so many of the systems and services Londoners take for granted, Business Improvement Districts (BIDs) have become integral to the liveability of this complex city. Quantitative economic impact may still be difficult to assess, but move from a high street managed by a solid BID to one without that support, and the difference is marked. What's starting to happen behind the scenes has even more potential – for BID members, the communities they serve and the boroughs that host them, as well as for London's competitive edge in the international destination rankings.

Since their introduction in 2005, London BIDs have evolved to generate project funding in the millions; explore new service, regeneration and Neighbourhood Planning opportunities; and thanks to Greater London Authority and London Enterprise Panel grants, become a cohort of 50 organisations stepping up in an increasingly self-sufficient municipal environment.

In the context of London's growing population and councils' shrinking budgets, the recent Department for Communities and Local Government consultation on BIDs has opened the door to far more participation in service delivery.

Many BIDs already have a better relationship with central government and entities such as Transport for London than their local authority hosts do, and are an effective lobby. At street level,

while many people can't say which initiatives and services are provided by BIDs, their absence would be obvious. Now, with more opportunity to move from 'branding, bins and baskets' to regeneration, planning and place-shaping, Business Improvement Districts are poised to become truly integrated into the municipal landscape.

This growing influence also means BIDs must be increasingly accountable for their actions, reporting not only to levy-paying members, but to a far wider group of stakeholders. BIDs, boroughs and other tiers of government also need to navigate changing relationships – political, contractual and operational.

This report charts that path, through a detailed, independent assessment of the role, impact and potential of BIDs in London, with a focus on high street and town centre BIDs. It builds on existing knowledge, updating the GLA-commissioned 2012 study, but goes beyond economic impact – notoriously difficult to gauge given London BIDs' variety and the economic rollercoaster from 2005 to 2016 – to back up the numbers with experience, and produce actionable intelligence.

Since 2012, several new BIDs have emerged, many with GLA and borough support, and the Mayor's target of 50 London BIDs by the end of his second term has been met. Capturing the experience of these newcomers, especially

in the context of gradual economic recovery, is already proving extremely useful.

The research has followed and complemented other projects, including a London Assembly review of BIDs¹ and current research on business rates, streetscape, planning policy and related developments, to make the project outcomes as current and as broadly useful as possible.

Finally, this report is designed to be shared beyond the GLA/LEP as commissioner and the London BID industry, to make the wider public aware of what Business Improvement Districts can offer, how they can be sustainable – and what Londoners can expect of them.

Notes on scope and research process

Project partners Future of London and Rocket Science used desk research, data analysis, surveys, focus groups and case studies to assemble the report evidence.

The research is concerned with the 36 high street and town centre BIDs that were operational in October 2015. It does not include the industrial BIDs or those that have since had successful ballots.

For more information on the research process and scope, see Appendix 1.

1.1 Executive Summary

Like many of the systems and services Londoners take for granted, Business Improvement Districts have become integral to this complex city. Quantitative economic impact is still difficult to assess, but move from a high street managed by a solid BID to one without that support, and the difference is marked. What's starting to happen behind the scenes has even more potential – for BID members, the communities they serve and the boroughs that host them, as well as for London's competitive edge in international destination rankings.

As an industry, London's Business Improvement Districts are still emerging. Some are agents of growth and influence, while others may have to prove their value to members to survive business rates reform. It is a staggered field in which leading BIDs, trade bodies, partnerships and the Greater London Authority and London Enterprise Panel are working to bring along the whole – and there is potential to do much more.

This report charts that path. Commissioned by the GLA and LEP as London approached the Mayor's target of 50 BIDs – a quarter of the UK total – the research assesses the impact and potential of London BIDs in a fast-changing municipal environment. The findings build on existing data, and back that up with front-line experience as a basis for practical short- and longer-term recommendations.

With a focus on high street and town centre BIDs (industrial BIDs are being researched separately), this report covers the current state of BIDs in London; support, impact and collaboration to date; funding, planning and other threats; and opportunities for new services, partnerships and influence.

In particular, the research highlights the growing number of London BIDs with a significant effect on – and beyond – their areas, bringing in vital investment and forging useful partnerships with the public and voluntary sectors, as well as with other BIDs. In addition to their traditional 'bins, branding and baskets' remit, BIDS are now directly involved in regeneration, place-making, air quality and employment initiatives.

Given the context of London's growing population and councils' shrinking budgets, the recent Department for Communities and Local Government consultation on BIDS has also opened the door to far more participation in council service delivery.

That opportunity and the 50-BID milestone make this a fitting time to shift gears. BIDs offer a five-year revenue stream, flexibility, government support and lobbying muscle, local expertise and a focus on results. This gives them a unique ability to innovate and make tangible improvements at a time when local government is struggling to deliver basic services.

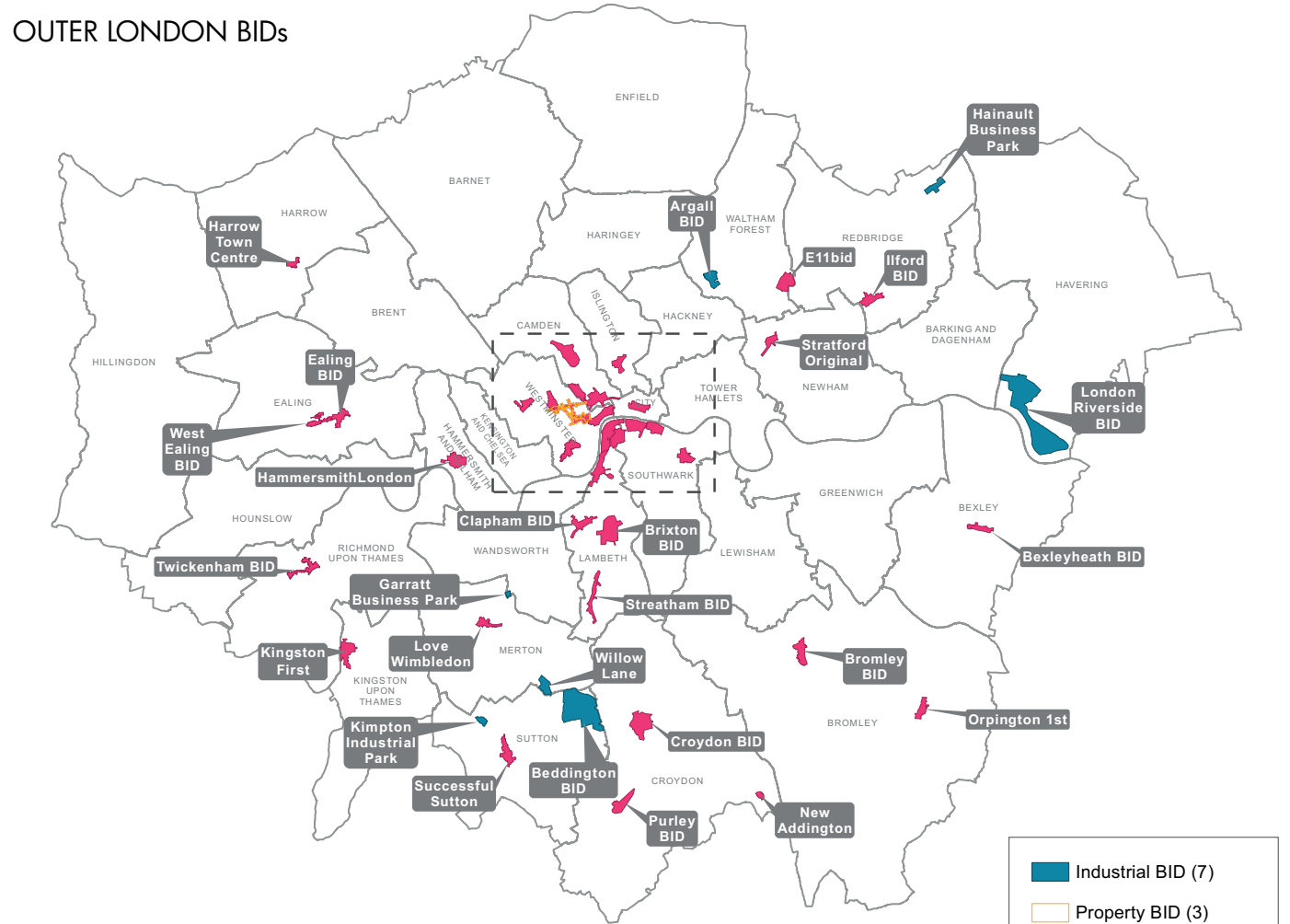
There are challenges, of course. BIDs must serve their business members first. Higher business rates and additional levies could sap member willingness to renew BID mandates. BIDs are not keen to become default council delivery bodies, and conversely, some councils and voters may balk at transferring control to the private sector.

All of this leads to BIDs' need to be increasingly professional and accountable for their actions, reporting clearly not only to levy-paying members, but to a wider public. BIDs, boroughs and other tiers of government also have to navigate changing relationships – political, contractual and operational.

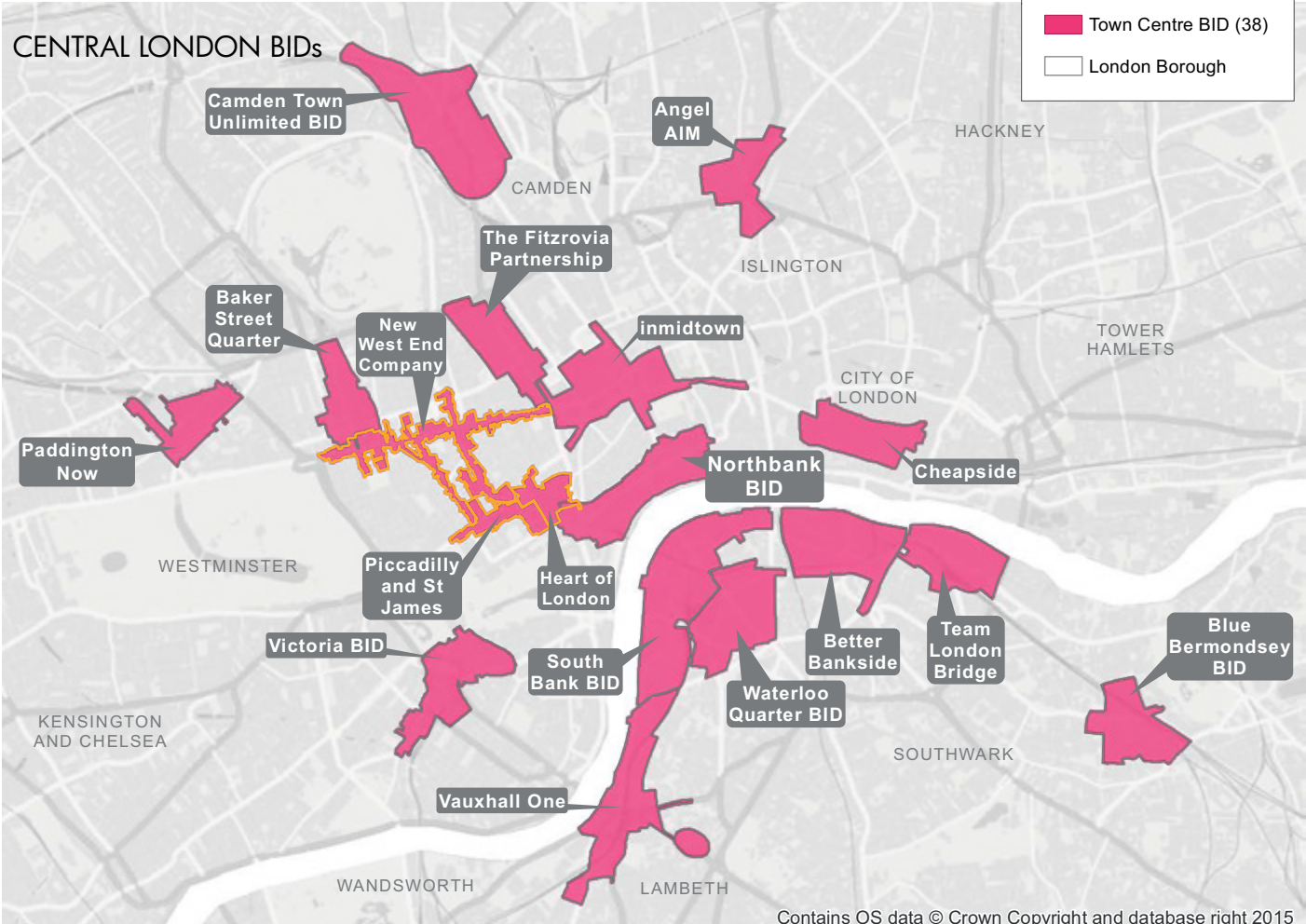
Many of these factors will be tipping points for existing BIDs. There are still areas of the capital that could really benefit from a viable BID, but this is also a good moment to weigh up the balance between support for creating new BIDs and nurturing the health, best practice and potential of existing BIDs.

As funding becomes increasingly competitive, BIDs must work together – and with councils and other partners – to secure their status as credible, integrated partners for the long term. It will take all parties to drive the whole industry forward, but the potential for London is enormous, and the time to act is now.

OUTER LONDON BIDs



CENTRAL LONDON BIDs



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2 BIDs IN LONDON²



Total
annual
levy
income

£24.9 m

61,000



Total number of
firms in BID areas



905,250

People employed
in BID areas

Total additional
income

**£5.5
million**

78



Partnerships with
key stakeholders

13,300

Total number of
levy-payers

Businesses on
BID boards



489

56

Local authority
representatives
on BID boards



Total
turnover
in BID
areas

**£356.5
million**

156



Full-time
employees

Additional services
provided by BIDs



287

66

Property owners
on BID boards

2.1 The emergence of BIDs

BIDs are a vehicle for coordinating business-led responses to the needs of a defined area of a town or city. They originated in North America in the 1960s and 1970s to halt the decline of downtown commercial centres. Following 2003³ enabling legislation, BIDs steadily emerged in the UK, largely developing from the Town Centre Management (TCM) movement and following a different path from the US model. BIDs could secure a sustainable income and act as a “funding remedy”⁴ for the TCM model’s reliance on voluntary business contributions.

There are now more than 200 town- and city-centre in the UK, almost a quarter of which are in London. Since 2012 alone, an additional 20 BIDs have been established in the capital, with the greatest increase (28%) between 2012 and 2013 (see Figure 1).

The London BID landscape is to some extent a reflection of the recent his-

tory of urban renewal in the capital. BIDs are a legacy of both top-down and bottom-up approaches to local economic development and urban regeneration. These include government-funded programmes such as City Challenge and the Single Regeneration Budget (eg Stratford Original and South Bank BID); developer/property-owner initiatives (eg Baker Street Quarter Partnership, Victoria BID); and those led by local business associations (eg Blue Bermondsey, Orpington First).

BIDs have been set up in very different parts of London. Some tackle manifestations of decline, particularly poor-quality public realm and the subsequent negative perception of the area. Others have emerged in already-prosperous areas to address challenges associated with growth.

The first BID in London – Kingston First – was set up in 2005 and in 2015 entered its third term. Six others have

also entered their third term: Better Bankside, Inmidtown, New West End Company (NWECC), Team London Bridge and the two Heart of London BIDs. Term renewal is one of the most telling indicators of a BID’s success. Eight BIDs with renewal ballots since 2012 all had increased turnout and approval rates (see Figure 2).

The 36 BIDs in the scope of this research⁵ tend to cluster in particular boroughs, with eight in Westminster and six in Lambeth. The 36 BIDs are in 19 of London’s 33 local authority areas.

Since 2013, five London boroughs have opted to host their first BID: City of London, Newham, Harrow, Bromley and Richmond (see Figure 3). This suggests that, although still concentrated within the Central Activities Zone and inner London, BIDs are increasingly a London-wide industry.

BIDs’ recent growth in inner London

Fig.1: Number of BIDs in London by Year

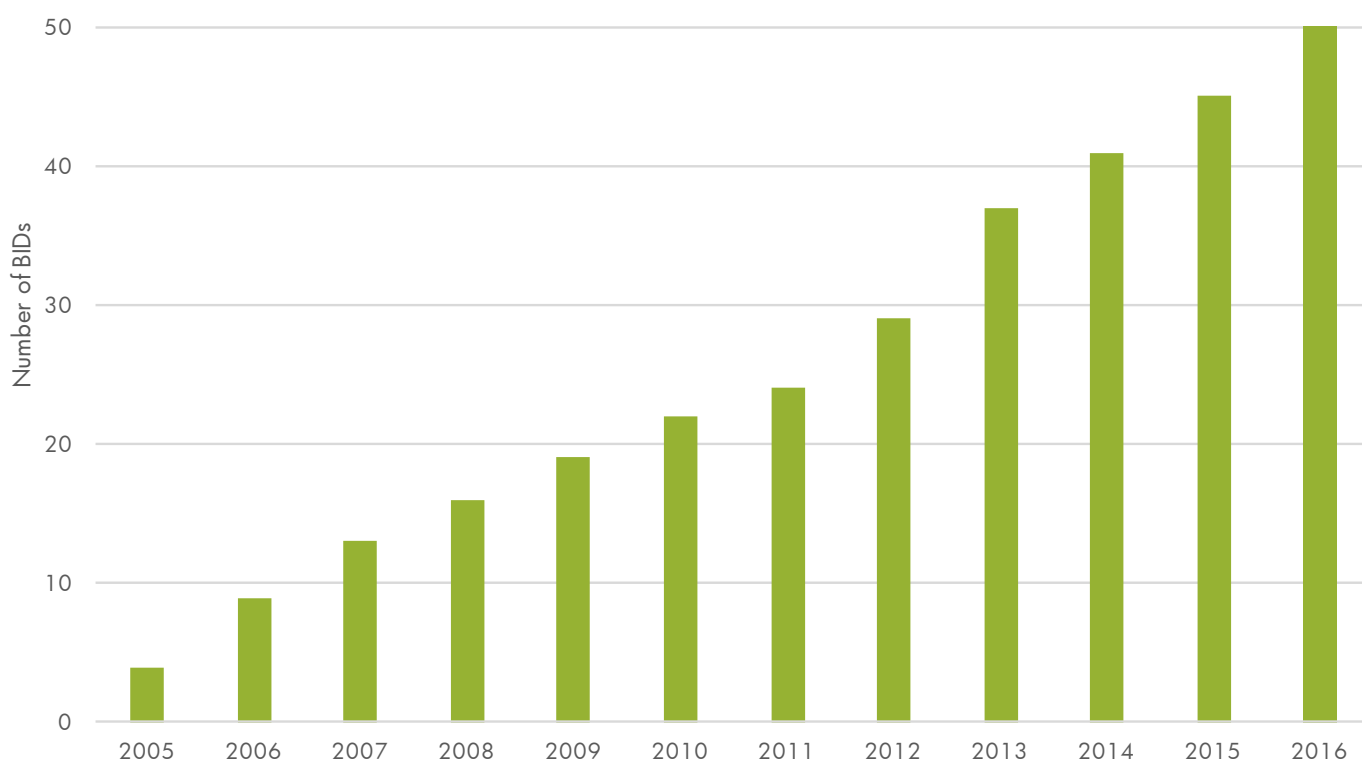
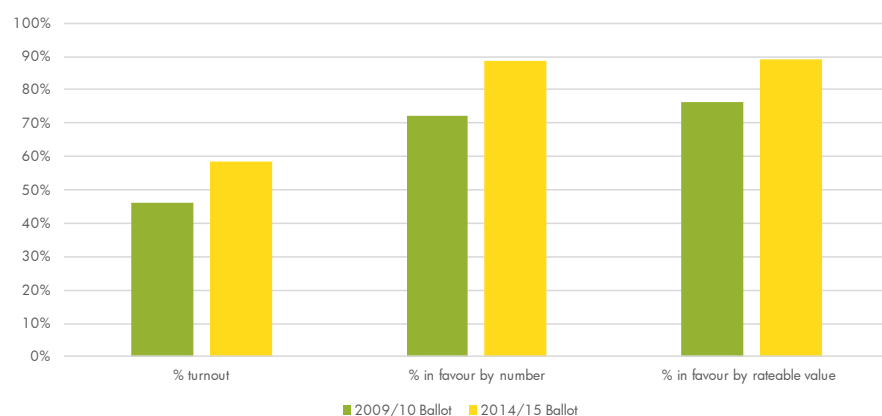


Fig.2: BID Ballot Turnout and Approval Rates

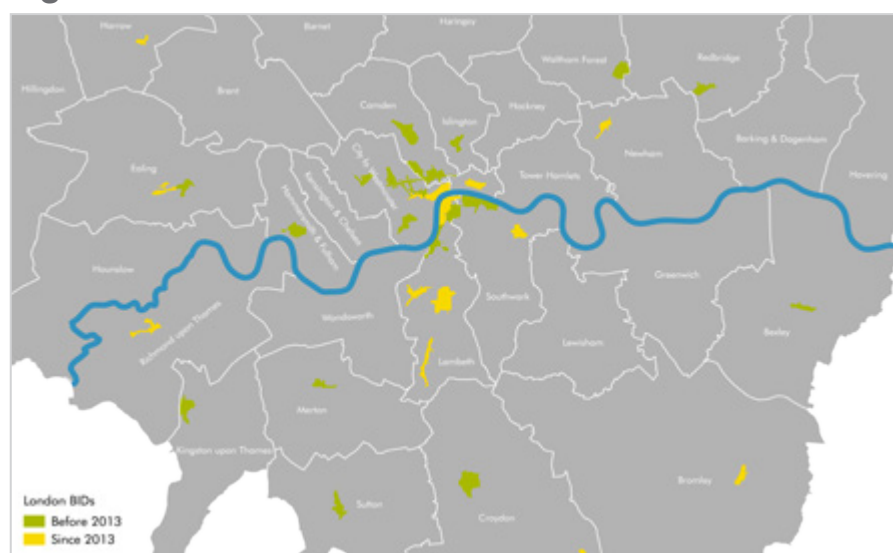


Source: BID ballot results.

explains why the number of businesses, employees and turnover have increased disproportionately to the growth in the overall number of BIDs:

- The number of firms in BID areas has increased by 89%, from 32,250 in 2012 to 60,980 in 2014;
- The number of people employed in BID areas has increased by 90% from 475,530 in 2012 to 905,240 in 2014;
- The turnover within BID areas has increased fourfold from just over £72m in 2012 to over £356m in 2014.⁶

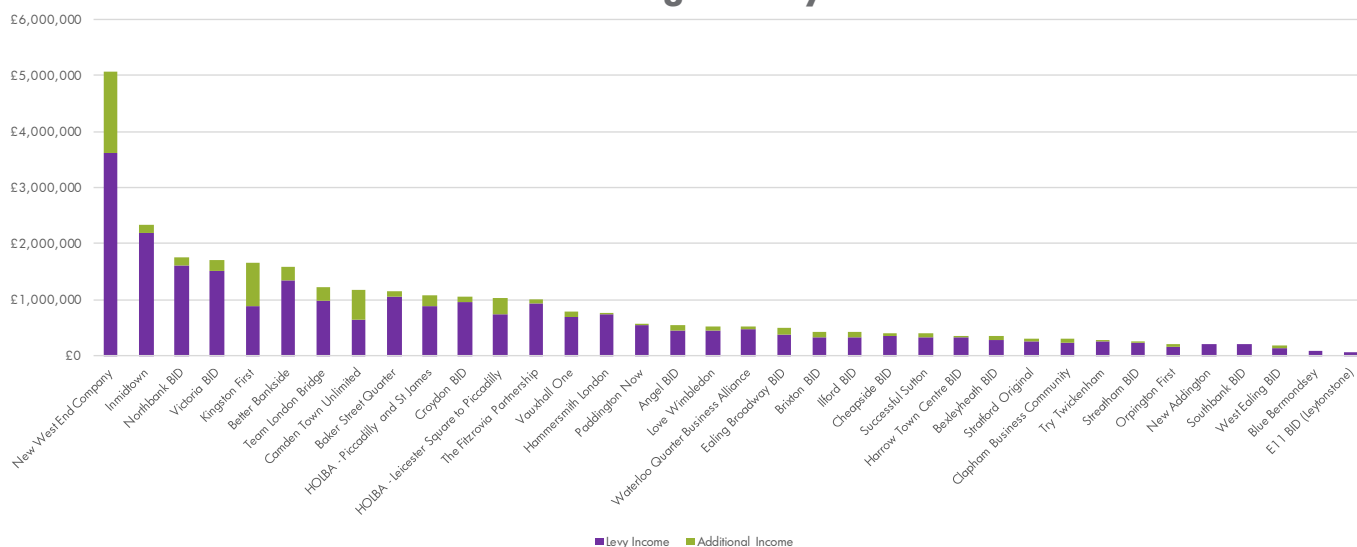
Fig.3: New BIDs in London since 2013.



Source: Adapted from GLA and Ordnance Survey data.

Total levy income secured by London BIDs has similarly increased from £14.6m in 2012 to £24.9m in 2015, at 71% markedly higher than the increase in the number of BIDs over the same period (39%). A major cause of this financial boost is the emergence of three property-owner BIDs in Westminster, home to some of the biggest rate-payers in London.

Fig.4: Levy income and additional income



Source: British BIDs.

2.2 BID funding and the local authority relationship

Despite the recession, BIDs' income from additional sources has seen a small increase as a proportion of their total income, rising from 16% in 2012 to 18% in 2015.⁷ Additional income sources are also relatively unchanged since 2012, with local government and voluntary business contributions being most common (see Figure 5).

However, these figures don't tell the whole story. As several of the case studies in this report show, London BIDs are effective in using their position to lobby for resources and investment in their areas, whether in the form of additional policing (through the Mayor's Office for Police and Crime), funding for streetscape and transport improvements (via Transport for London), or local regeneration schemes (through joint bids with borough partners to the Mayor's High Street Fund). These sums may not show up in the BIDs' financial accounts, but BIDs have been instrumental in securing them on behalf of local

partners.

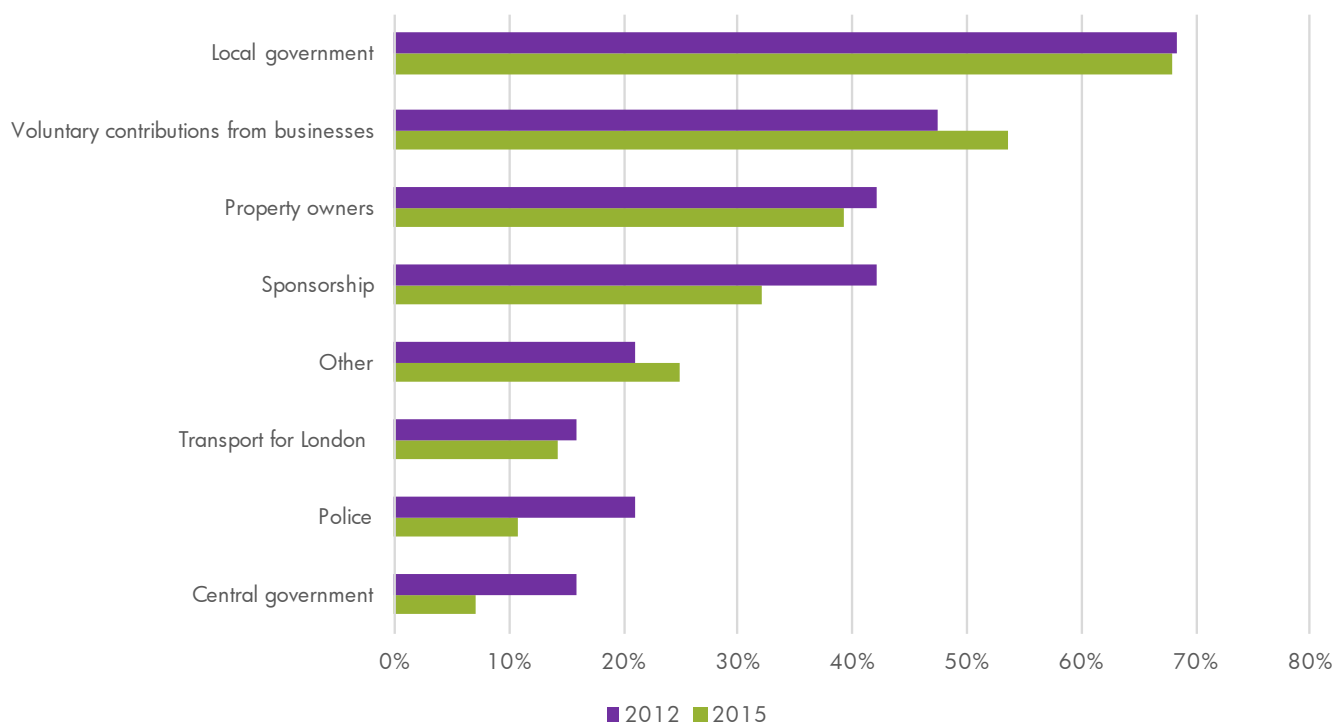
The continued prominence of income from local government may seem surprising given that council funding was cut 28% from 2011-15, and a further 10% in 2015/2016.⁸ Those cuts are sharpest in poorer areas, whose residents have experienced the greatest reduction in spending per person (31% compared to an average 23% nationwide).⁹

BIDs' financial strengths – a five-year revenue stream, flexibility and leveraging (see SWOT, Section 4) – are among the things that make them attractive to local authorities, perhaps especially in uncertain times.

Operationally, an increasing number of London BIDs are taking on the management of council services in their areas, particularly community safety, cleaning and environmental management. However, the rate of increase in the last three years has been low, with the number of BIDs

recording a service contract with their local authority inching up from 38% in 2012¹⁰ to 41% in 2015.¹¹ BID managers surveyed or interviewed for this research either said they had insufficient capacity to take on council services, or they were reluctant to do so when it compromised their *raison d'être* of providing additionality.¹² However, as councils hunt for further savings over the next four years, BIDs are likely to feel increasing pressure to do more.

Fig.5: Sources of Additional BID Income



Source: Survey responses, ATCM.

2.3 Diversity in BID types

London BIDs are no longer confined to town centre and city centre models with a retail focus. Although retail still accounts for an average 38% of levy income,¹³ there has been a steady diversification of BID types in London:

- City centre BIDs (eg Victoria BID, Inmidtown, Northbank BID)
- Town centre/high street BIDs (eg Ealing Broadway, Orpington First, Croydon)
- Property-owner BIDs (eg New

West End Company, Heart of London Business Alliance)

- Partnership BIDs (eg South Bank BID, Baker Street Quarter Partnership)
- Local authority-led BIDs (eg Cheapside BID)
- Community-led BIDs (eg Blue Bermondsey)

Note that this report does not address industrial BIDs, the subject of separate GLA research.

2.4 Summary

The last 10 years have seen steady growth in the number of BIDs in the capital. In that time, only one (Bayswater) has been disestablished. BIDs which have gone for a second or third renewal of their five-year term have all succeeded, often with an increased mandate.

Though some BID propositions outside London have failed,¹⁴ and large areas of the capital remain untouched by BIDs, the growth in number in London

and nationwide suggests a buoyant – and maturing – industry. London is home to the UK's only property-owner BIDs, with their larger income streams, and many of the capital's occupier BIDs attract significant inward investment. As they evolve, London's Business Improvement Districts are increasingly important not just as effective place managers, but as vehicles of business-led economic regeneration and urban renewal.

3 FUNDING POLICY CHALLENGES

3.1 Austerity and devolution

The state is shrinking. Nationwide, local government grant is being cut by 56% between 2016 and 2020, from £11.5bn to £5.4bn.¹⁵ The Chancellor has also signalled an end to formula grant post-2020, in exchange for a “devolution revolution”, with local authorities having the power to raise council tax and retain 100% of their business rates.¹⁶

Despite these self-financing mechanisms, there will be a funding gap. London Councils estimates that the decade of cuts could lead to a gap in London of over £3bn (31%) by 2020. In terms of where these cuts would fall, nearly 80% of local government revenue spend in London (£5.7bn of £7.3bn) would be on statutory services – adult and children’s social care, public health and waste management. Spending on non-protected services

would need to be squeezed by as much as 58% by 2019-20, inevitably leading to further significant cuts.¹⁷

Professor Tony Travers of the London School of Economics and chair of the London Finance Commission has suggested that local government must transform from “mini-welfare state into local economic growth agency”,¹⁸ fully responsible for generating sufficient revenue for service provision through economic growth.

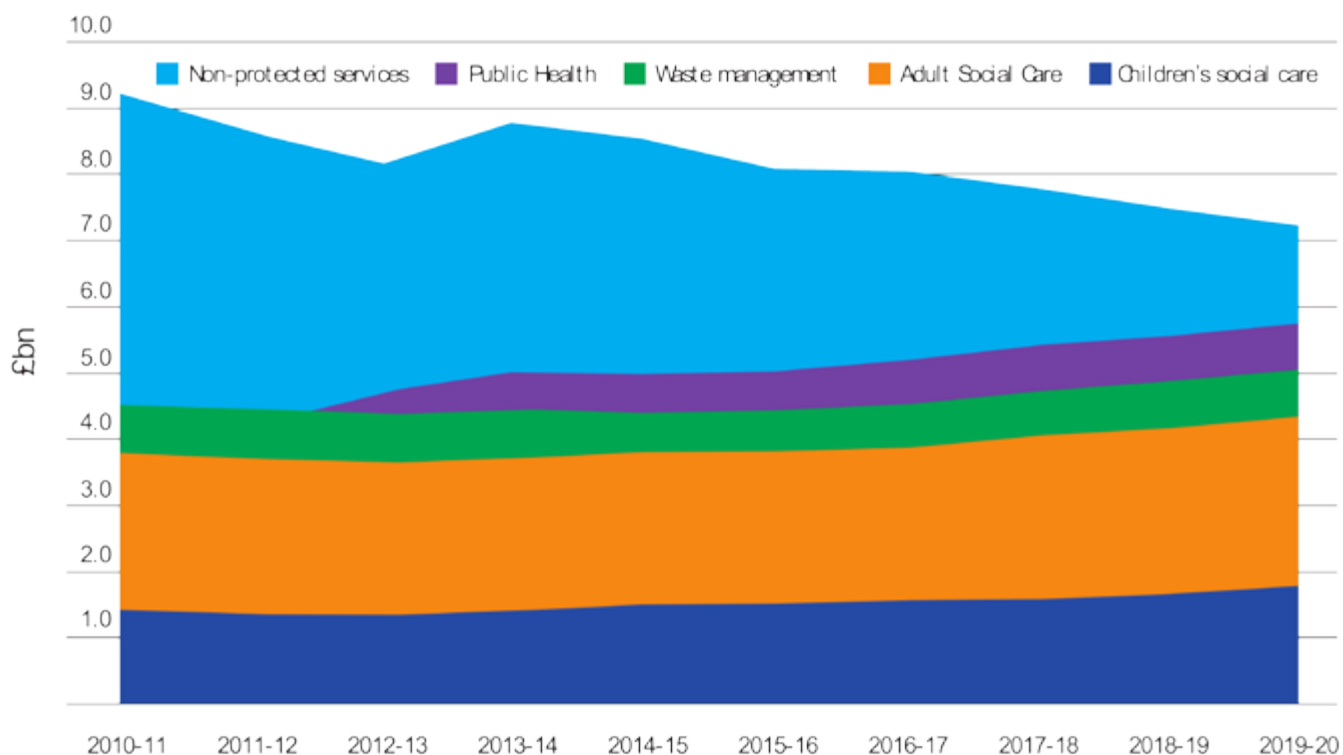
This dramatic re-think is easier for some than others – local authorities differ enormously in scale and capacity. For those used to being supported by more prosperous areas through rates redistribution, the “spectre of failure”¹⁹ may loom larger now. The government announced two years of modest transitional grant to local

authorities to bridge between cuts and rates retention, but whether some element of redistribution continues for vulnerable areas remains to be seen.²⁰

Some councils find it natural to prioritise economic growth, but others may find the increased focus on business uncomfortable, especially when commercial interests don’t align with resident (ie voter) priorities.

Surveys suggests that these relationships are already fraught, with considerably fewer people recognising the need for council cuts in 2015 (35%) than in 2011 (47%).

Fig.6: Projected expenditure on services – 2010-20 London local government.



Source: DCLG RO and RA data, 2010-11 to 2014-15; London Councils modelling 2015-16 to 2019-20

Figure 6: Projected expenditure on services – 2010-20 London local government. Source: London Councils.

3.2 Business rate reform

Business rates, worth £26bn to the Treasury, are on the brink of major reform. On top of devolution, the whole system is under review, with details to be announced in the March 2016 budget.²¹ This is in response to concerns from business rate payers that the system is “in need of reform to make them fit for purpose in a 21st century economy”.²²

Many organisations, including the Association of Town Centre Management (ATCM) believe the current system is archaic and unjust:

“It is not fair that some highly profitable multi-national corporations minimise their tax liability by shifting profits to low tax jurisdictions leaving property-based businesses from local shops to manufacturers to pick up the bill simply because property cannot be shifted.”²³

The rate revaluation, deferred to 2017, will hit London harder than the rest of the country, as the government’s desire for the system to remain “fiscally neutral”²⁴ means the economically resilient capital will compensate for the impact of the recession in other regions. Investors are concerned that this will have a profound effect on

business occupiers, particularly in London growth areas, which will bear the brunt of the rates shock, predicted by BNP Paribas to include increases of 80% in St Pancras and King’s Cross, 60% in Bond Street and 50% in new developments on the South Bank.²⁵

This reform seriously threatens the viability of businesses facing abrupt increases, with smaller businesses in high-growth areas particularly vulnerable. Furthermore, on the council side, austerity could make it difficult to continue protective initiatives such as small business rates relief.

Decentralisation of rates points to a changing relationship between BIDs and their local authorities, especially as it will be more in councils’ interest to see their business communities thrive. However, while local authorities won’t be able to increase rates, they may be pressured to add other charges to their funding strategy such as late night levies and tourism taxes.

Despite the government’s firm commitment to devolution, most of London’s businesses continue to be affected by both central and pan-London decisions. Although the proposed power for combined authorities with mayors

to charge a 2p supplement to fund infrastructure projects will be new for the other city-regions, London businesses have been charged a Crossrail supplement since April 2012. While the target end date is 2037-38,²⁶ a similar value-capture funding mechanism has been proposed for Crossrail 2. If the project goes ahead, London’s businesses could be locked into the financing of major infrastructure till the late 2060s.²⁷

In addition, the National Living Wage will rise sharply in April 2016, and it is assumed that the next Mayor of London will continue to put pressure on businesses to pay the considerably higher London Living Wage, which can be challenging for small businesses. At the other end of the scale, larger employers will be paying the Apprenticeship Levy from April 2017.²⁸ Businesses could start to object to paying for this gamut of national, pan-London and local financing mechanisms.

3.3 Summary

In 2014, Ward and Cook wrote that “the combination of the financial crisis and the state-led austerity programme has made the operating climate for UK BIDs harsher.”²⁹ Business rates reform has changed the game again, and it remains to be seen whether getting (part of) the fiscal devolution London business and government leaders have called for will be a blessing or a curse.

4 LONDON BIDs SWOT ANALYSIS

STRENGTHS

- Define and promote a geographic area
- Have reliable five-year income stream
- Have clear focus on membership
- Respond nimbly and with local knowledge
- Provide enhanced services to their areas
- Deliver public realm projects for the wider community
- Improve area safety and security
- Provide conduit for boroughs and pan-London entities to engage with business
- Advocate on behalf of BID members and area
- Leverage funding from different sources
- Initiate/support inward investment
- Broker and develop partnerships between public, private and voluntary sectors
- Have formal working agreements with host boroughs
- Have ongoing national political support

WEAKNESSES

- Don't always have funds to match ambitions
- Can't always demonstrate hard economic impact
- Lack of awareness (businesses, boroughs, residents) of BIDs and their impact
- Conflicts between business and borough interests, and occupiers (levy-payers) and property owners
- Less professional BIDs hamper overall sector maturity
- In strengthening thriving areas, BIDs can increase inequality, and shift socio-economic problems to surrounding areas
- Other business networks compete to broker services
- Those against privatisation of London's public space could find BIDs unpalatable

OPPORTUNITIES

- Local authority cuts could provide opportunities to bid for more borough services
- Cuts could allow greater role as agents of economic development and regeneration delivery
- Rates devolution could make BIDs more pivotal as strong conduit between council and businesses
- Localism agenda could mean long-term role in place-making through Neighbourhood Planning
- Strengthen borough and public relationships through increased visibility/accountability
- Establish more property-owner BIDs to increase levy income for designated areas
- Growing focus on place-based giving initiatives and the opportunity to link with BID work on CSR
- Reduce costs through more joint procurement and shared services

THREATS

- Local authority cuts leave BIDs vulnerable to picking up services not in their business plan or skill-set
- Budget pressures of rates devolution could strain BID-borough relationships
- Additional levies could compete for business revenue
- Rates revaluation could mean unsustainable hikes in businesses' tax burden in growth areas
- Continuation of permitted development (office-to-residential) could undermine BID base and income
- Increasingly competitive funding landscape
- Streamlined process for BID to form neighbourhood plans could give developer members disproportionate influence over area
- Insufficient stewardship could lead to BID business community turning against it
- BID may lack capacity to benefit from collaboration
- GLA/LEP could reduce funding/support for BID

4.1 Analysis

Three themes cut across the SWOT: Funding, awareness and collaboration.

Funding

Changes to the business rates system, propelled by the government's austerity and decentralisation initiatives, present a clear opportunity to strengthen the BID-council relationship. For local government, BID's interest in **improving, defining and promoting an**

area, plus their **local-level knowledge**, are real strengths. Regeneration is fundamental to London's growth and prosperity, but regeneration and planning departments face significant cuts. With their **responsiveness, flexibility and ability to leverage funding**, BIDs are logical partners for boroughs in uncertain times.

However, not all BID are financially equal, and smaller BID may lack the

skills and capacity to meet growing borough and business expectations. An **insufficient number of levy payers** is a significant threat to the viability of individual BID, and can be exacerbated by **competing policies and levies** (see Section 3.2). Larger BID may be cushioned from the worst, though their members could face the highest **business rates revaluations**. How many smaller BID will stay viable?

Awareness

In a devolved landscape with more competition for business rates revenue, BIDs must become indispensable to both levy payers and the wider community.

Currently there is no consistent measurement of BID impact; some measure footfall or employment change, but few consider wider socio-economic impacts and there is no London-wide set of indicators or timeframes. Being able to **demonstrate hard economic impact** would be a huge help in proving their worth. Property agents acknowledge the positive effect of BID improvements to a neighbourhood, but don't believe that being a BID area has a positive **effect on the saleability/value of property**.

In this situation, perceptions become more important. If the **wider community** is not aware of a BID's positive impact, it could engender negative feelings and associate them with the '**privatisation of public space**' debate. Sian Berry, Green Party mayoral candidate, recently pledged a change to the London Plan regarding the governance of publicly accessible places,³⁰ and University of East London academic Anna Minton recently gave evidence against BIDs at the London Assembly Regeneration Committee.³¹

Are **weaker, less professional or transparent BIDs damaging the sector's reputation**? How best to counter the '**empire-building**' stigma of one managing company running a number of BIDs? What can these companies do to publicly safeguard the BID USPs of independence, uniqueness and ultra-local knowledge? Clarity will also be key as BID involvement in

Neighbourhood Planning increases. BIDs may be best resourced to lead these efforts, but being seen as 'taking over' could foster bad feelings from community groups lacking the corporate weight (and interests) of their BID counterparts.

Collaboration

"Councils know they will have to work more with their business communities – the question is how." – Senior borough economic development officer

It has already been noted that relationships between local government and business are being redefined. It is worth reflecting on how complex this is. Not only are businesses and public bodies entirely different in terms of structure, objectives and accountability, but BIDs represent the interests of a specific business community which needs to see a return on its investment.

The **growing maturity of the sector** is an asset. Individually and as an industry, BIDs are earning higher levels of trust, more money and greater room for manoeuvre; all useful in collaborations with local government. As this report shows, this is borne out through the **brokering of effective partnerships between the public, private and voluntary sectors**. Discussions around BID capacity and appetite for taking on more municipal responsibility through **service transfer** will become more frequent, and easier if the relationship is solid. This would open up new income streams for BIDs, but they could start to feel like victims of their own success; by demonstrating that they are able to procure a service efficiently and cost-effectively, they will be expected to do more, potentially at

the cost of their business plans and of additionality.

Further, local authorities will have to consider all revenue options, and the private sector will always be a target. For example, **additional levies** such as the Late Night Levy are already starting to appear across London. Faced with more of these mandatory charges, businesses could withdraw support from the BID at the next ballot in an effort to cut the one optional charge. To avoid this, it is the responsibility of BID management to **lobby the authority** to keep charges reasonable.

BIDs also need to have their collective voice heard on national policy. The **General Permitted Development Order** in particular poses a serious threat to BID viability. The conversion of a single block from office to residential could permanently erase part of a BID's levy if occupiers relocate outside the BID area. Although the Central Activities Zone (CAZ) and Tech City are exempt till 2019 (see Section 5.1), the rest of London remains vulnerable. Similarly, conversations on the **Crossrail 2 levy**, which will affect a significant proportion of London's business community, are starting to heat up.

In 2016, the London BID community has strength in numbers, with 50 BIDs – the Mayor's target – now in place. Whether it's a group of BIDs in one area jointly procuring or sharing services, or the whole industry having one voice on a policy matter, the opportunities for collaborating exist. But BIDs' individuality means that collaboration is not always possible, and **competition for funding** is inevitable in some cases.

5 IMPACT: PROJECTS AND SERVICES

The following assessment of London BID's front-line impact measures their evolution against the significant changes to boroughs' role and capacity. As illustrated here, BIDs are already delivering far more than town centre management. They have the potential, particularly through col-

laboration with other BIDs and public authorities, to have strategic influence on a range of London-wide priorities. This brings a number of challenges for management, governance and transparency, not least around the measurement and reporting of their impact.

5.1 The roles of London BIDs

BIDs' roles are multi-faceted: as **service providers** on behalf of levy payers in specified locations, but increasingly also meeting the needs of a wider community; as **catalysts and enablers** of innovative projects which address different policy priorities for London, including employment and skills, environmental management and air quality; as **influencers and campaigners** again on behalf of levy payers and the BID area, but with the capacity also to speak out on London-wide issues; as local **convenors and conduits** to the business community, and as **research repositories** for a wide range of socio-economic data and intelligence on different localities across London. Some BIDs are all of these but many, for want of resources, focus on particular activities.

BIDs as service providers

Providing services is the most visible way that BIDs demonstrate their impact. The original remit of BIDs remains the provision of enhanced cleaning, environmental management and community safety initiatives. These are increasingly complemented by a range of additional services including place-shaping and marketing, as is evident in newly-branded areas of the capital such as Midtown and Northbank, and in the proliferation of uniformed street ambassadors in London's town centres.

"We have two restaurants; the other one is in [an area of] west London where there isn't a BID and I can really feel the difference."
– Levy payer, Angel BID

London BIDs tend to diversify their offer through their initial five-year lifecycle. Having proven their ability to deliver core services, they become trusted with more complex projects, leveraging additional income and becoming recognised as public-private sector conduits.

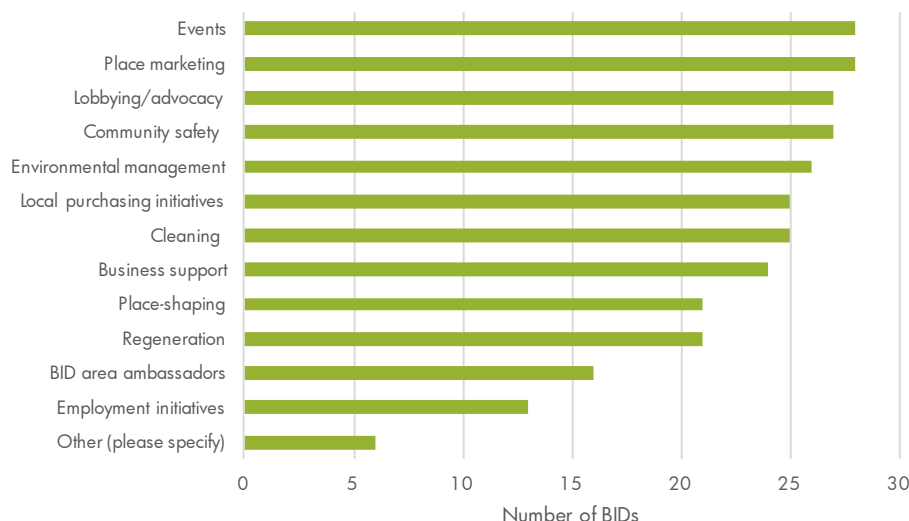
The rate of that transition can vary. A number of BIDs still in their first term are benefiting from partnering with TfL on local projects, including sustainable transport, safety and security and environmental and greening schemes.

For example, TfL co-funded Vauxhall One BID's Green Trail project,³² which has helped to regenerate the local area through sustainable planting, and jointly funded the Wonderpass with Baker Street Quarter Partnership to offer pedestrians an immersive art experience as they cross safely beneath Marylebone Road.³³

Meanwhile, Blue Bermondsey, established in October 2014, is already forging ahead with initiatives to challenge perceptions of the area, including art projects and guided walks building on the area's history as the 'larder of London'.

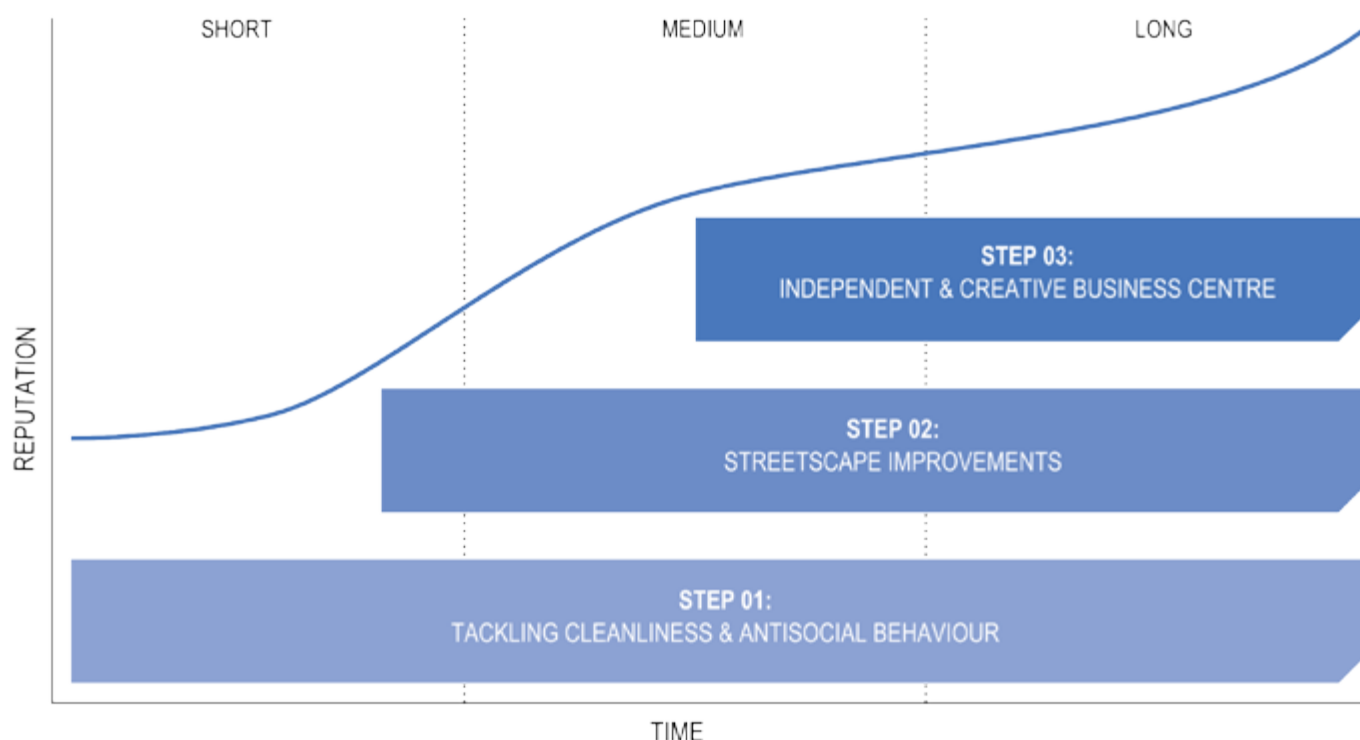
In the context of continued council cuts, BIDs are also having to redefine the 'additionality' of their services, calling into question the validity of their baseline agreements with councils. Whilst BIDs have historically provided services beyond a minimum level agreed with the local authority, some BIDs are starting to deliver services themselves when these come under threat (eg Better Bankside street

Fig.7: BID Activity Areas



Source: Survey responses.

Fig.8: Evolution of BID as service providers.



Source: Camden Town Unlimited Renewal and Extension Proposal, 2016-2020

cleaning; Victoria BID additional uniformed security).

Government grant cuts usually target councils' revenue, rather than capital, funding. BIDs' regular revenue source makes them attractive partners for local authorities, especially where premium services are expensive to maintain. For example, Heart of London Business Alliance (HOLBA) funds an enhanced cleaning programme for Leicester Square, following a major public realm improvement scheme funded by property owners, Westminster council and TfL. Partners agreed the baseline service was no longer adequate to maintain a high-quality environment for this international destination. Heart of London now provides the additional service.

Statutory services, however, are a harder sell. A number of councils (including Camden, Lambeth, Southwark and Westminster) are interested in their BIDs' capacity to deliver local services. However, most BIDs are cautious. As one BID chief executive put it: "We would love to deliver more

council services, but we simply do not have the resources to do so." As many BID leaders are former local authority officers, they appreciate how difficult – and expensive – it can be to run high-quality public services. For them it also represents a potentially risky distraction from their core business of meeting the needs of levy payers.

Of the 28 BIDs surveyed on this issue, 11 currently have a service contract with a council, and of the 17 who do not, seven expressed an interest (see Figure 9).

BIDs as incubators and catalysts

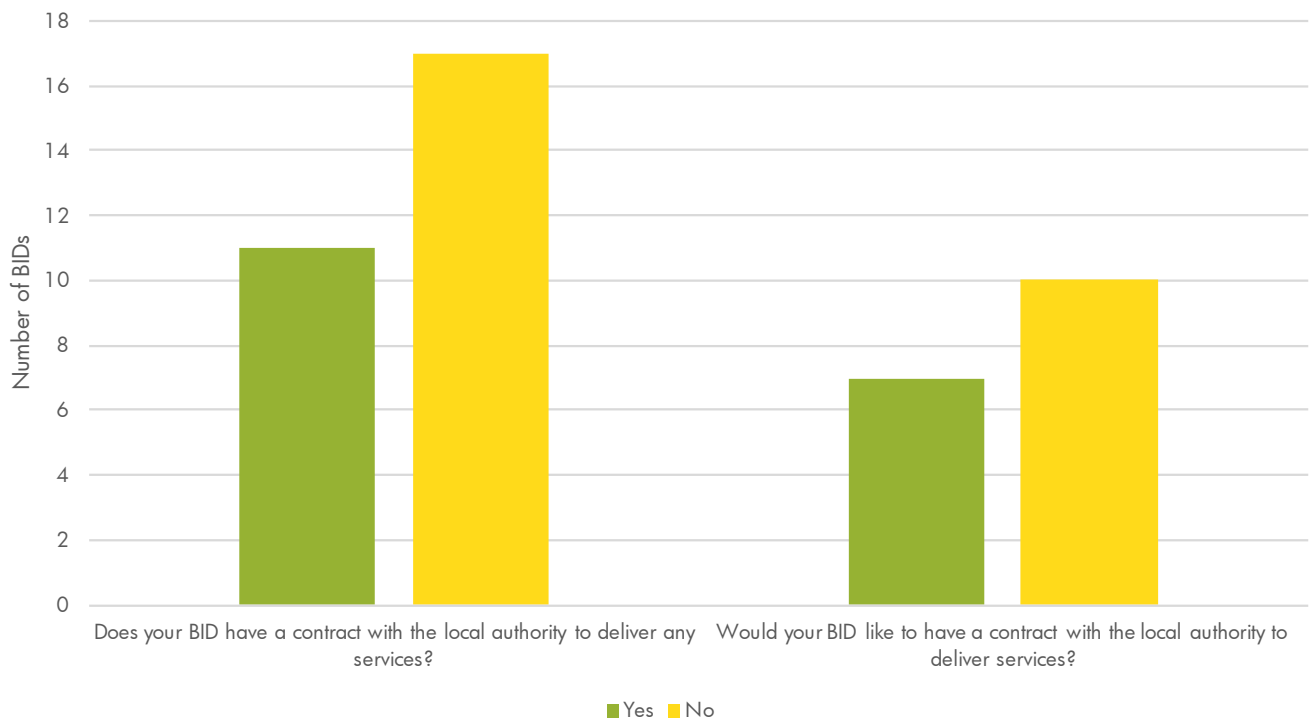
A BID's levy income provides flexible funding for an annual programme of services which the BID's management agrees with its members. This tends to be drawn from a set menu of activities including place-marketing, events, public realm improvements and cleaning, loyalty cards, shared procurement schemes, security and, increasingly, uniformed street ambassadors (see Figure 7).

The flexibility of the levy also gives BIDs the option of co-investing in initiatives with a longer-term economic development benefit. BIDs are well placed to act as incubators and catalysts for a range of pilot projects which, if successful, can be replicated or scaled up in partnership with other organisations.

BIDs of all stages and sizes play this catalytic role. Blue Bermondsey, for example, acted as an enabler for the Bermondsey Community Kitchen,³⁴ offering unemployed 16-25-year-olds the opportunity to train for a career in professional cookery. Although the idea came from a local cafe owner, the BID included the community kitchen in its initial business plan and has since identified various sources of funding, establishing links with local schools and youth services which have been instrumental in its foundation.

In Angel, the BID initiated a project in partnership with the council, local businesses and the voluntary sector called Age Friendly Angel.³⁵ This comprises a range of marketing measures,

Fig.9: BID interest in delivering services for local authorities



Source: Survey responses.

streetscape and public safety improvements which, by enhancing Angel as a place to shop and dwell, will attract more of the 'grey pound' into local shops, cafes and restaurants.

Established BIDs with small management teams thrive on this catalyst role. Team London Bridge, for instance, piloted an employer-facing job brokerage, then worked with BID partners (Better Bankside, We Are Waterloo

and Vauxhall One) to increase its scale and impact under a shared brand, Employ SE1.³⁶

The continuous chain of BIDs along the south side of the Thames now provides a wider business-led partnership for collaborating on larger-scale projects. This includes the Low Line, coordinated by Better Bankside, to maximise the regeneration potential of the railway viaduct which runs

through several of the BIDs.³⁷ The Low Line is a nod to the High Line in New York which also re-imagined an under-used stretch of railway infrastructure. The viaduct already houses a variety of small businesses; the Low Line will help more locate in the railway arches so the routes become busier, safer and more welcoming.

BOX1

Collective Temperance Hospital

Collective, run by the charitable arm of Camden Town Unlimited (CTU), offers free hot-desking and subsidised office space to creative start-ups. In 2015, CTU acquired the lease of part of the derelict National Temperance Hospital and has opened the space to entrepreneurs as Collective Temperance Hospital. The Temperance Hospital will be demolished to make way for new rail lines if the High Speed 2 (HS2) rail line goes ahead, preventing long-term regeneration of the site. Collective's meanwhile use was supported by Camden council to help minimise the blight of vacant buildings in the area potentially affected by HS2.

The hub also provides meeting, event and classroom space. The project has used its High Street Fund award to make the ground, first, and second floors of the building available. Collective is now inviting proposals for the upper floors which match its objectives of supporting local businesses and regenerating the high street.



BIDs as influencers and campaigners

London's BIDs have become increasingly vocal. This campaigning role has grown in parallel with local authority budget cuts, and with the increased threat to BID members of double- or triple-paying through new levies, higher business rates and infrastructure charges. A BID's ability to provide a voice for local businesses is valued by members:

"If you are a resident you can vote, but as a business you have no vote, you just pay the rates. It's a very passive relationship." – Business owner in a London BID

BIDs need to be politically savvy. From one issue to the next, they can find themselves in partnership or in opposition to their council. Angel BID has a strong relationship with Islington council but still found itself leading a successful campaign against a change to the council parking policy.

London BIDs also speak individually and collectively to nurture London's competitive advantage as a global city, and as one competing for investment with other UK city regions. The New West End Company (NWE),

for example, lobbied the Home Office to relax visa regulations, which it says would increase the number of Chinese tourists coming to London and bring in an estimated £330m. NWE has also lobbied the Treasury on reform of Sunday trading hours, which the BID believes could generate an extra 2,000 jobs in the West End and more than £200m a year in additional sales.³⁸

At one point, NWE was lobbying on as many as 25 separate issues, but it has recently changed tack, recognising that other business groupings – including the new Inner London BIDs group (see Section 7.2) – can be a more effective voice on common issues.

London BIDs' independence does mean they will disagree on some of the capital's policy challenges; BIDs are in separate camps, for example, on Heathrow vs Gatwick airport expansion. Nevertheless, when BIDs do coalesce on an issue they can be a very effective lobby.

BIDs as conduits

London's high street and town centre BIDs provide a conduit to over 60,000 businesses across the

capital. They are particularly useful for targeted communications, given their locations in places of strategic importance. Of the 15 metropolitan centres and two international centres identified in the London Plan, 10 are now home to a BID.

Pan-London authorities have found BIDs to be invaluable partners. Senior officers from the Metropolitan police regularly provide briefings to BID chief executives so that they can cascade information and advice on business resilience and community safety. Transport for London (TfL) has recognised the importance of BIDs to its programme of stakeholder and public engagement, liaising with BIDs both on day-to-day operational issues, travel advice and strategic projects such as Crossrail 1, the Tube modernisation programme and the £4bn Road Modernisation Plan.

BIDs' evolving role

The research asked London's BIDs about the importance of involvement in a number of strategic areas. The need to collaborate was recognised as essential by the most BIDs, and was the most important element on balance. Strengthening performance indicators also scored well, dem-

BOX2

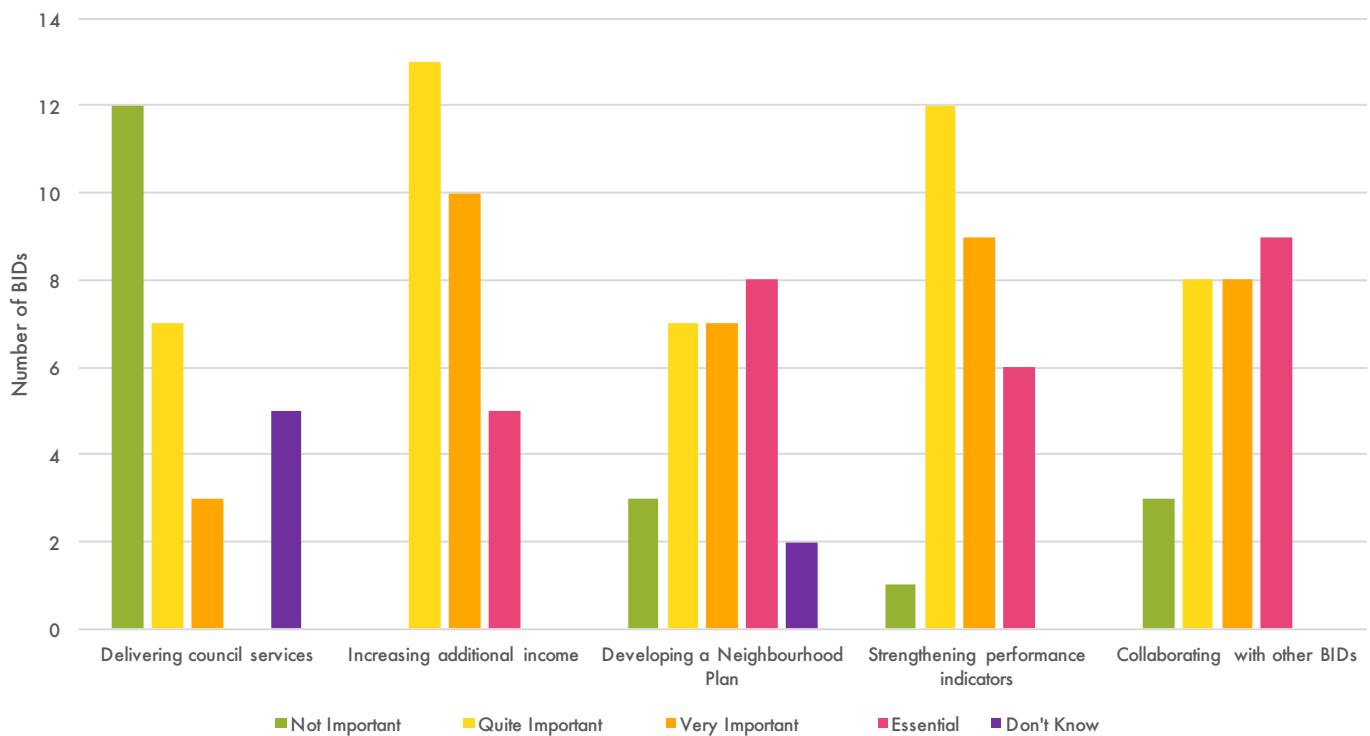
Permitted development rights

In 2013, permitted development rights (PDR) were temporarily amended to allow changes of use from office to residential without the need to seek planning approval. Some areas were made exempt from the new PDR, including London's Central Activities Zone (CAZ) and east London's Tech City.

In 2015, central government announced a consultation to extend PDR and remove the exemptions. London BIDs were concerned about the impact on their member businesses and the local economy. Office-to-residential conversions threaten BIDs' revenue, since loss of commercial property reduces their potential income base. They argued that not only those businesses which lose their premises are affected by PDR, but also those that rely on the custom of employees based in the area. Further, London residential values provide a financial incentive for landlords to change the use of the best commercial property, rather than the less desirable, underused space which the government's policy was intended to target.

London BIDs joined the Mayor of London, the London Enterprise Panel and others in successfully lobbying the government not to remove the PDR exemption. In March 2015, 37 BIDs signed a letter to the Secretary of State asking that the exemption be extended to include all of Greater London. In October 2015, the Department for Communities and Local Government announced that the existing exemption will remain in place until May 2019. In order to keep the exemption after this date, local authorities will be able to issue an Article Four Direction, which allows them to make a local change to the planning regulations.

Fig.10: BID priorities



Source: Survey responses.

onstrating an understanding of the importance of evidence for improving industry perceptions. Delivering council services was seen as the least important, suggesting that there needs to be more dialogue between BIDs and their host boroughs on this critical issue.

BIDs as research and data repositories

Several of London's larger BIDs fund an annual research programme. Data is primarily used to inform BID proposals or to measure the impact of

projects and services, and most of it is publicly available. BIDs' direct access to businesses combined with cuts to council economic intelligence units means BIDs are becoming increasingly valuable sources of socio-economic data.

While many BIDs gather data themselves (or use public datasets for their area), there is no standard set of metrics across all BIDs, making performance comparison difficult. The lack of baseline data for many areas presents a further problem. Collection

of baseline data would allow BIDs to isolate the effects of their own performance, rather than relative effects compared to areas with often wildly different characteristics.

A standard of data-gathering adopted across all BIDs would become a valuable resource to the GLA and borough officers, as well as being shared and updated via the GLA's London Datastore.

BOX3

Crossrail 2

Given Wimbledon's status as a key transport hub, its BID, Love Wimbledon, has forged a close working relationship with Transport for London. This has included using poster sites to promote the town centre and providing a conduit for TfL to engage the local business community.

Crossrail 2's managing director, Michèle Dix, recently spoke at a meeting convened by Love Wimbledon and attended by over 80 businesses and landlords, as well as Merton council senior management, councillors and Merton Chamber of Commerce. As a result of interventions coordinated by the BID, Crossrail 2 published documents which provide clearer information on the potential phasing of the nine-year project in order to minimise disruption.

5.2 Economic data analysis

This research has included the collection and analysis of data from 2005 and 2014 on three key metrics: numbers of businesses within a BID area, their turnover, and number of employees. This data was also compared to a 200m fringe area for each BID.³⁹

The figures show that, in general, BID areas performed more strongly than their fringe areas, and that there is a weak but tangible positive correlation between the number of years a BID has been in existence and the growth in turnover of businesses within the BID boundary (see Figure 11). Longer-established BID areas performed better across all three metrics. However, there are many other factors relating to wider economic trends at national and local level; the nature and strength of neighbouring localities; and, in particular, a BID's proximity to high-profile areas of central London.

The West End, for instance, is home to a strong local economy. Three BIDs where turnover growth was markedly stronger in the fringe than within the BID area are located here – New West End Company, Fitzrovia Partnership and Heart of London. In the West End there are many more powerful drivers of economic growth than the presence of a BID, especially for office-based businesses; in this area there is limited value in comparing a BID with its fringe in terms of turnover growth.

Of the BIDs in outer London where turnover growth was markedly stronger in the fringe than within the BID, Twickenham and Sutton were only recently established, while Croydon and Ilford deserve closer investigation.

Figure 12 demonstrates that there is a positive relationship between growth in turnover of businesses within the BID area and the number of years a BID has been in existence, which suggests that a BID may be partly responsible for business growth.

Analysis of growth in the number of firms was contradictory. BIDs in central London were expected to experience stronger growth than outer London; this was borne out by increases of 30% and 21% respectively, but the fringe areas achieved stronger growth in outer London of 24%.

For jobs growth, BID areas exceeded fringe areas across the whole dataset, and again BIDs in the CAZ were more successful – they had combined growth of 21% compared with 9% across the whole dataset.

Results suggested that analysing data for 2005 and 2014 is still unhelpful, since so many London BIDs are still young: the comparison includes too many years before they were established. To gain real insight into the effectiveness of a BID, analysis should take into account: length of time in existence; characteristics of neighbour-

ing areas; proximity to central London and segmentation of businesses by sector to distinguish between retail and office uses.

Interviews with property agents confirmed the difficulty of directly attributing economic impact to BIDs, although all those interviewed stressed the qualitative impact of BIDs. The consensus was it would not be possible to attribute directly any element of the rental or investment value of a commercial property to the presence of a BID, or to its presence within a BID, although one did acknowledge that, "Yes, probably there is a fall-off in value on the wrong side of the boundary" and that the "walking territory of the ambassadors" is the most visible sign of difference.

On the other hand, all agents acknowledged that the presence of a BID has an influence on the attractiveness of a location. Aspects explicitly mentioned were security, cleaning, events and street ambassadors, as well as a more over-arching observation that a BID improves the image and perception of a town centre. Many of the agents were directly involved with BIDs, some as board members. This would indicate that BID activities – and connections – are valuable, even if they cannot link them directly to increased property rents.

BOX4

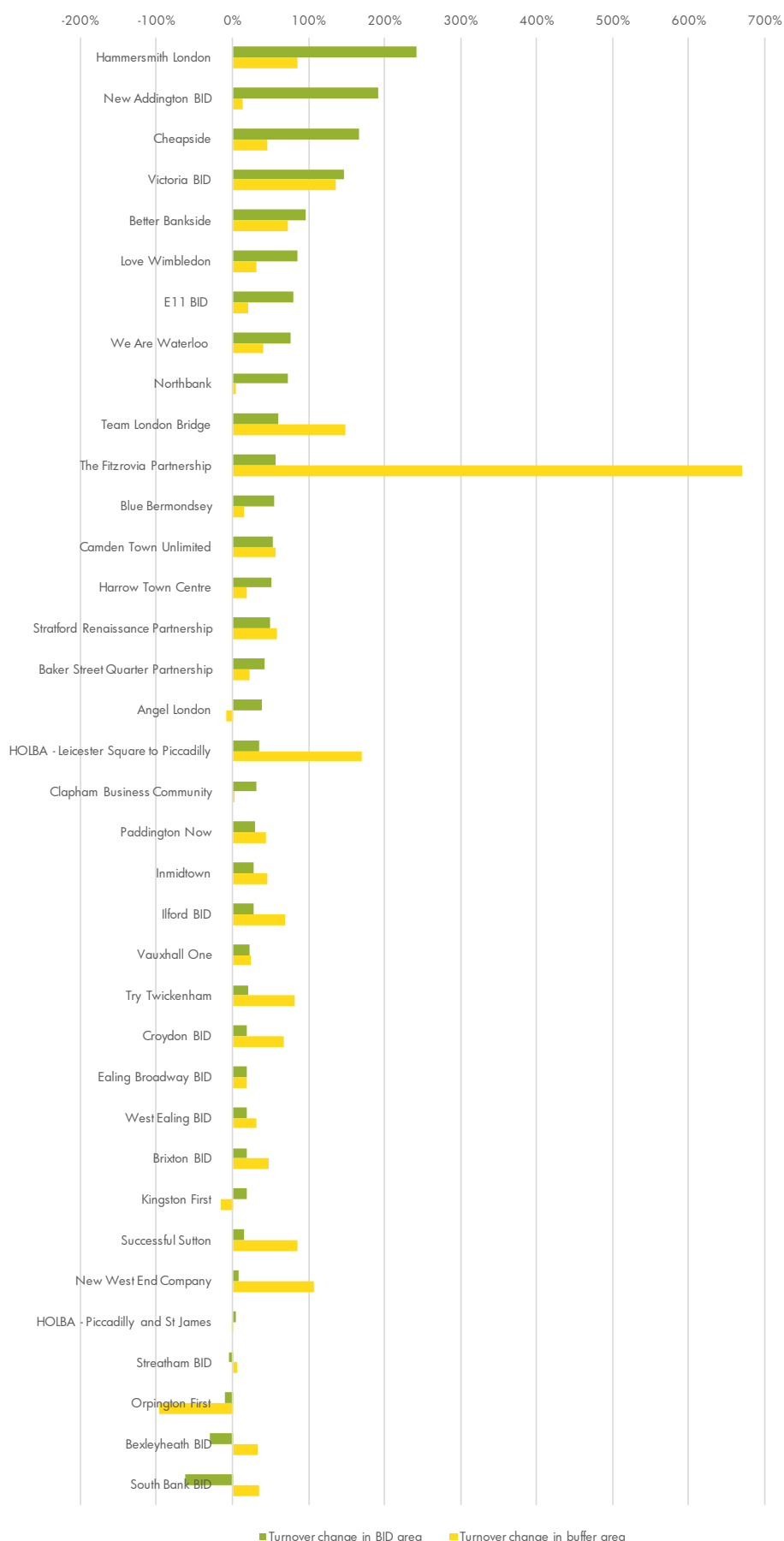
BID research, thought-leadership and data-gathering

Team London Bridge funds a programme of bi-annual research outputs which it makes available on its website. New West End Company publishes analysis on the impact of particular developments and policy changes on the West End, including a recent report which concluded that the opening of Crossrail together with the potential extension of Sunday trading hours could lead to a near 100% uplift in West End turnover. Better Bankside publishes detailed research, along with summary discussion documents, to canvass partners' interest in co-investing in local initiatives. Northbank and Victoria BIDs have commissioned books on each of their areas in order to ensure the BIDs' work acknowledges the longer-term, historical context.

Property agents confirming that the appearance and condition of a town centre is critical to attracting shoppers and retailers suggests an 'implied value'. There may be some evidence of this:

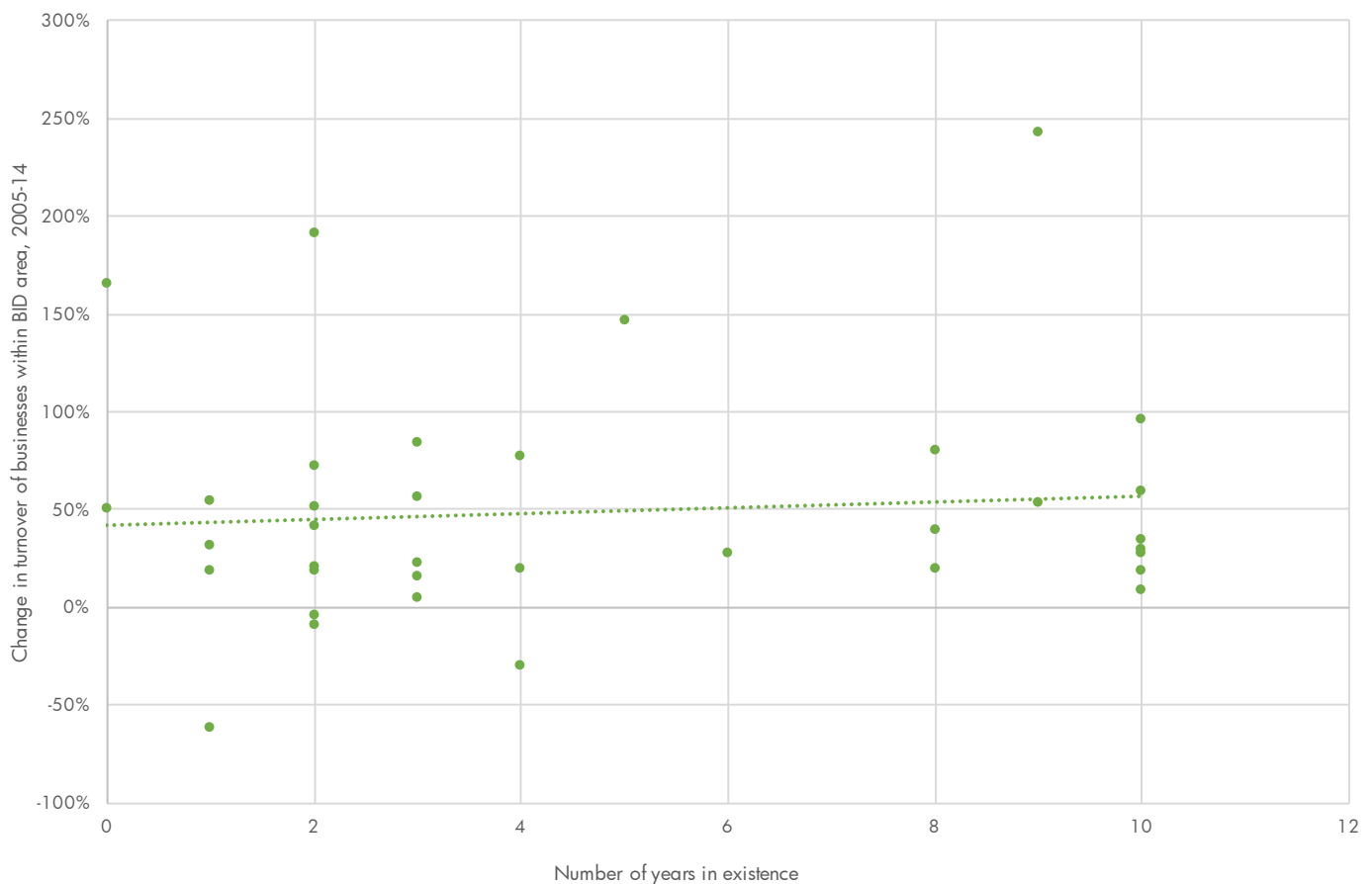
- Events bring in shoppers and if they generate additional turnover that enhances the desirability as a business location, which ultimately translates into rental value.
- In centres that have both an indoor, managed shopping centre and a BID, the occupiers inside the centre pay a service charge for maintenance of the indoor environment and a BID levy for management of public realm outside. The fact that they accept both charges suggests support for the work of the BID. The centre managers and major retailers from the covered centre generally become actively involved in the BID; this willingness to be involved is a strong indication that they value the BID's work.
- A key factor for office occupiers when making location decisions is the ability to recruit and retain staff, and the image and perception of a town centre contributes to this. As well as the quality of the public realm and amenities, safe streets and way-finding all contribute to the image, some of which are beyond the control of the BID.

Fig.11: Change in turnover in BID area and 200m buffer area 2005-14



Source: TBR.

Fig.12: Growth in turnover within BID area vs years in existence



Source: TBR

5.3 Summary

This survey of town- and city-centre BIDs in London reveals that they are performing an increasing variety of functions as agents of day-to-day place management and longer-term regeneration. The characteristics which seem common to BIDs operating across these different roles is their flexibility to respond quickly to new opportunities or demands and their capacity to innovate (albeit sometimes in pursuit of a competitive advantage for their particular area).

However, as local authority service delivery does not seem high on BIDs'

agendas, boroughs will need to start a dialogue with their BIDs early, and work towards a situation that benefits both parties. Ten years after the creation of London's first BID, the question remains whether, in the context of councils' increasing focus on nurturing local economic growth, BIDs are only capable of strengthening thriving districts, potentially widening gaps between London's successful and unsuccessful areas, or whether they can also regenerate areas of market weakness.

At the same time, the lack of baseline data for each BID area makes it difficult to link economic effects with BID activity, though older BIDs have naturally had more time to make an impact within the 10-year timeframe of this review. The indications that BIDs have an effect on economic development are worth exploring further, and a standardised set of metrics to be measured regularly for each BID would help provide the level of accuracy required.

6 CASE STUDY Victoria BID: focusing on the BID's role as a catalyst and incubator



Established	2010; mandate renewed 2015
Businesses	260
Staff	5
Levy income	£1,516,970
Additional income (source,value)	£289,503 (business contributions £189,503; property owners £100,000)

6.1 Background

Victoria Business Improvement District is closely involved in the ongoing transformation of Victoria from a rather sterile, office-dominated environment to a lively urban hub, combining new homes, modern offices, high-street retail and diverse cultural and leisure facilities. This revives the area's prestige as the thoroughfare which 150 years ago connected a

new railway terminus to the Palace of Westminster and was given the monarch's name. But it has also established Victoria as a destination, with upgraded rail and tube stations and major developers and landowners like Land Securities and the Grosvenor Estate partnering Westminster council to transform the area.

Now in its second term, Victoria BID

provides complementary services to businesses and residents of the area which range from promoting the area and attracting investment to influencing and mitigating the effects of development itself. As highlighted below, the BID has been the catalyst for a project to promote and enhance its green spaces.

6.2 Impact and value

Victoria BID reports quarterly on a range of indicators with a bearing on the success of the area and the BID's coordinating and, in some cases, catalytic roles.

In 2014, the BID produced a more detailed Vibrancy Report,⁴⁰ based on a format used by US BIDs, which is both a qualitative and quantita-

tive assessment of the returns on the £4bn investment in Victoria's redevelopment. Whilst Victoria BID didn't claim direct responsibility for all those benefits, bringing them together in an annual update helped the BID make a convincing case for the transformation of Victoria and the wider social, economic, environmental and cultural

benefits accruing from this investment.

The 2015 BID renewal ballot was as good an indicator as any of the perceived value of Victoria BID by its members. The results were 85% in favour on a turnout of 62% (compared to 67% and 55% in 2010).

6.3 Relationship with the local authority

The BID has a close working relationship with Westminster council. The council is a strong proponent of BIDs and, where appropriate, is keen to find ways for the eight BIDs across Westminster to work together to deliver services.

The council has encouraged the BID to support the work of the Victoria Neighbourhood Forum which will enable the forum to access Community Infrastructure Levy funding to support the development of a Neighbourhood Plan for the area; it was also supportive of the BID extending its boundary

when it renewed its mandate in 2015. The council has partnered the BID on a range of public safety and security projects, including supporting street wardens and collaborating to address the high number of rough sleepers in Victoria.

6.4 Innovation and replication: Greening the BIDs

In 2010, Victoria BID undertook a ground-breaking green infrastructure audit. This mapped, described and analysed all the existing and potential green infrastructure features in the area. The aim of the audit was to encourage more use of greenery in the area, which is dominated by hard surfaces. The idea of greening the BID complemented developers' objectives to transform Victoria's hard 1960s urban environment, but an independent evaluation also showed that creating a greener Victoria would deliver savings to BID members and the wider community.

Over several weeks, a team mapped parks, verges, streets and rooftops to identify options for adding green spaces and enhancing existing areas. The audit provided recommendations on how green features could reduce flood risk, increase biodiversity and make the area more appealing to visi-

tors. It also led to the implementation of green infrastructure projects including a 350m² living wall at the Palace Hotel; the development of a tree strategy and the installation of beehives along with beekeeping courses.

Each BID green infrastructure scheme is funded in thirds, by the BID, grants and business(es) benefiting from the scheme. The recently installed rain garden outside John Lewis's headquarters in Victoria Street, for example, was part-funded as a demonstration project along with the GLA and Natural England.

Carrying out a green infrastructure audit provides a BID with potential projects and partnership opportunities within its area; Victoria BID's membership of the Cross River Partnership (CRP), has given the initiative a wider catalytic effect. CRP now manages the Greening the BIDs project for the GLA.⁴¹ The project contributes to

the objectives of the Mayor's green infrastructure strategy, the All London Green Grid. Supported by £150,000 of Drain London funding, 15 central London BIDs have now completed green infrastructure audits, identifying opportunities for 300 rain gardens, 200 green walls and more than 100ha of green roofs.

A further £210,000 of Natural England, Drain London and mayoral funding secured by Cross River Partnership has levered £440,000 of private-sector investment to increase London's biodiversity and enhance its environmental resilience. To date, the Greening the BIDs programme has delivered 22 green infrastructure assets in central London, including bird boxes, planters, green walls and roofs and rain gardens. Each project is majority match-funded by the private sector.

6.5 Lessons

Working with partners like Cross River Partnership has rapidly scaled up a project proven to work within one BID area, taking the 'think global, act local' environmental credo to the sub-regional level.

The green infrastructure audit is also an example of how BIDs can collabo-

rate effectively to deliver considerable public-private investment for a London priority. It counters the assumption of many BIDs that their differences (often highlighted for competitive advantages) mean they have little to gain from working together.

7 COLLABORATION AND PARTNERSHIP

7.1 BIDs and boroughs

Section 3 highlighted the extent of the changes facing local government. Councils are now running out of ways to deliver further cuts through savings. Instead, many are considering how they can become ‘enablers’ rather than direct providers of certain services.⁴² Now encouraged by central government to raise more of their own revenues locally, many London boroughs are showing growing interest in BIDs and the opportunities they present for collaboration and partnership working. However, public–private partnerships are far from straightforward and need to be carefully nurtured.

BIDs appeal to councils for different reasons. Inevitably, as councils become more stretched, they will become more aware of BIDs’ ability to procure services at a competitive price, and will want to consider whether further cost-savings could be made if a BID took on a greater role on their behalf.

Local authority structures vary and relationships with BIDs are handled by different departments in different boroughs. Some are the responsibility of the chief executive’s department; in others, the relationship lies with regeneration or economic development; and in some, reflecting the town centre management origin of BIDs, it sits with environmental services.

This lack of consistency in how councils engage with BIDs may also explain differing views on the value of BID baseline agreements, which are used to set out the existing level of service provision in order that the BID can demonstrate the additionality it will offer. Most of the newer and smaller BIDs which took part in this review commented on the usefulness of their baseline agreement. They also recognise that in the context of localism and continued cuts, baseline agreements need to be more flexible, to accommodate service changes from one year to the next, and to be far clearer in defining statutory versus non-statutory services.

The existence of a baseline agreement template, funded in part by the GLA, has been invaluable in setting up BIDs. However, as several council officers concurred, the agreement should not be a short-cut for detailed preparatory work to ensure that the agreement is an accurate reflection of each BID’s unique circumstances.

As there is not a mechanism to force the local authority to adhere to a baseline agreement, a council can unilaterally reduce the level of service. Representatives of some of London’s more established BIDs have questioned the continued value of baseline agreements, especially with diminished council funding for services. An alternative view expressed by some BIDs is that a regularly updated baseline would provide transparency and allow for more informed decision-making. On the other hand, the recent government consultation considers whether a standard and legally binding form of service level agreement between BID bodies and local authorities should become mandatory.

Public–private partnership

In contrast to the laissez-faire approach some councils have adopted with BIDs, others are seeking public–private partnerships. Councils that

have responded to cuts by redefining their role as enablers see BIDs as integral to establishing new forms of service delivery and stimulating local economic growth. Boroughs which have taken this approach so far include Westminster, home to eight BIDs; Lambeth (six); Southwark (four) and Camden (three).

Westminster, for example, recently instigated regular meetings between the leader of the council, the cabinet member for regeneration, business and economic development and the borough’s BID chief executives. This is a clear signal to the BIDs that they are regarded as key to the economic growth of the borough. The meetings will identify opportunities to contract out services, including to local BID partnerships, as well as enabling the BIDs to report back on council services in their areas.

In Lambeth, a bi-monthly BID forum brings together the borough’s BIDs and senior officers from different departments to identify joint initiatives (eg established BIDs supporting new or proposed BIDs in the borough) as well as opportunities for joint procurement and sharing of back-office services. Lambeth’s transformation into a ‘Cooperative Council’ includes

Fig.13: Cross River Partnership members



Source: Adapted from Cross River Partnership.

reviewing whether there are opportunities to break up bigger contracts as they come up for renewal. Smaller contracts, delivered more locally, will provide opportunities for BIDs (eg Vauxhall BID will take over management of Vauxhall Park under a council contract). The forum also lets BIDs propose and test new ideas, including South Bank BID's proposals for a shared apprenticeship scheme and an initiative to promote the living wage in the area (see Section 8.4).

At a sub-regional level, Cross River Partnership (CRP) brings together 15 BIDs and eight local authorities from the central London area to collaborate on a range of pilot programmes. CRP often uses a cocktail of private and public funding sources to both achieve economies of scale and stimulate in-

novation in the design and delivery of services (see Section 7.2).

Communication

"This government listens to business a lot more than it does local authorities." – Senior council officer

It is in the mutual interest of BIDs and local authorities to have regular points of contact and clear communication channels. A visible and proactive BID can support the council by lobbying for its area. BID chief executives who have a profile locally and with central government can be useful allies.

Camden Town Unlimited, for example, lobbied the council strongly to help secure a 30% discount on the Late Night Levy in all Camden's BID areas. After making the case for the significant effect the levy would have on the

council's business community, CTU and the other Camden BIDs worked with officers to explore the extent of BIDs' investment role, in order to strengthen their case to the council. Central London councils are now considering a tourist levy on hotels, and BIDs need to be part of those conversations.

Systems for engagement need to be robust, however, as there will be occasions when the BID's and the local authority's interests conflict. In Croydon, relations between the BID and the local authority became temporarily strained last year when the council's Labour administration took umbrage at the blue uniforms, along with bowler hats, of the BID's new street ambassadors. They now wear an eye-catching pink.

7.2 The London BIDs community

Drivers of collaboration

A survey of 31 London BIDs conducted in 2015 identified numerous examples of collaboration, and considerable interest in doing more.⁴³ The main drivers cited were the opportunity to achieve greater economies of scale and better value for money from sharing procurement or expertise, and to give BIDs a stronger collective voice within London.

Perceived impediments to collaboration included the strong sense of difference between BIDs in terms of their aims, location and size, and an inherent sense of competition which stems from championing a particular locality. BIDs' lack of time and resources was also noted.

Certainly inter-BID collaboration is neither easy, nor always appropriate. As London's BIDs reach 50 in number, they are an increasingly diverse group, with varying interests, dynamics and agendas. As one BIDs expert put it: "Partnership is vital, but what you see on the surface is only ever a fraction of what's going on. It takes a lot of work to engender those relationships." This is challenging for

organisations which typically have a relatively small permanent staff.

London's businesses would undoubtedly benefit from a unified business voice for lobbying, and a coalition of London's BIDs could be an effective means of doing so. While this would not be easy to coordinate, or indeed to reach consensus across numerous separate business entities, a cohesive BIDs voice could play a key role in sharpening London's competitive edge. This will become increasingly important as devolution is rolled out to the city-regions, some of which – such as Newcastle upon Tyne – have one well-respected BID representing the city's business community to its local authority.

As the following examples show, collaboration is happening as much by chance as by design, with an ad hoc mix of BID-financed infrastructure and area-based partnerships, supporting inter-BID collaboration and cross-borough public-private initiatives.

Industry and trade bodies

BIDs have two national trade bodies: British BIDs and the Association of

Town Centre Management (ATCM). Many of London's BIDs are members of both organisations, recognising that they provide complementary expertise and services, particularly in relation to set-up, management and governance, as well as their representation at a national level.

Both British BIDs and ATCM also see their roles as enabling BIDs to collaborate. Between them they manage various regional BID networks and, in ATCM's case, last year coordinated a number of applications from BIDs in the capital to the London Regeneration Fund. Both organisations observe, however, that in comparison to some other parts of the country, London BIDs are a relatively weak network, with one spokesperson referring to a "loss of collegiate spirit." A similar sentiment has been expressed by senior GLA officers who have said that, compared to other business groupings in the capital, BIDs do not yet "punch their weight" on matters of business and economic policy.

A group of BID chief executives has recently taken steps to address this by proposing an Inner London BIDs

alliance as a vehicle for lobbying at a London government level. The goal is to promote greater awareness of their BIDs' work and maximise collaboration opportunities on shared interests with other inner London stakeholders. Several interviewees, including BID chief executives and a BIDs expert at the Department for Communities and Local Government, have questioned the necessity of another representative body. However, in the context of further government devolution, to London and on to sub-regions of the capital, this development is only a reflection of current realities, and of the increasing divergence of BID interests in London.

Cross-borough and inter-BID collaboration

Any recommendation relating to London BIDs' collaboration or joint representation has to be tempered by the fact that they remain fiercely independent organisations. GLA officers are the first to acknowledge that future collaboration at a pan-London level, or in any alternative multi-borough or shared-interest group, needs to come from the BIDs themselves, working with the grain of existing infrastructure and partnerships, rather than imposing new top-down structures.

There are already numerous instances of formal and informal collaboration between BIDs in London. Established BIDs are piggybacking and mentoring newer ones, both within a borough (eg Ealing Broadway supporting West Ealing BID, a process helped by the fact that they share a chief executive), or across a sub-region (eg Kingston First providing advice to Love Wimbledon on preparing for its term-renewal ballot next year).

Neighbouring BIDs are likely to find the logistics of sharing staff and services more straightforward. The new Bromley BID is keen to develop a joint approach to public realm improvements by working in partnership with the longer-established Orpington First. Within central London, where a number of BIDs share borders, there is a strong case for local partnerships, a process facilitated in Westminster by the council's BID forum. One BID is in effect another's gateway, with mutual interest in the quality and efficiency of services across multiple BID areas. The New West End Company (NWECC) and the Heart of London Business Alliance (HOLBA) have recognised this in the marketing and promotion of London's Luxury Quarter, which for

the last few years HOLBA has formally subcontracted to its neighbour.

The same two BIDs, plus Northbank and Baker Street Quarter Partnership, are also members of the West End Partnership, comprising the West End's two boroughs (Camden and Westminster) and strategic partners which include the GLA, TfL and the Metropolitan police.⁴⁴ The BIDs, however, work as one within the Partnership, and are currently represented on its board by the Baker Street Quarter Partnership.

Networks and partnerships

The growing number of BIDs in south-west London (Croydon, Kingston, Sutton, Twickenham and Wimbledon) has prompted informal networking with the makings of a more formal arrangement for exchanging ideas and collaborating on projects. Skills development and knowledge transfer are essential to any maturing industry, and particularly vital to one that needs to raise its profile. The consultancies which manage multiple BIDs across the capital also cross-fertilise ideas and projects between BIDs, countering the perception and negative connotations of empire-building

BOX5

Employment schemes

The provision of local employment schemes, particularly job brokerage services, is a key commitment for a number of BIDs. Individual BIDs like Angel collaborate with their local council's employment services and Orpington First is partnering a large housing association, Affinity Sutton, to prepare their unemployed residents for job opportunities in the town centre. In the City of London, the Cheapside Business Alliance has commissioned Step Ahead to run an employment service targeted at getting unemployed City and City Fringe residents into work within the Square Mile.

A good example of BIDs working together at scale to provide such services is Employ SE1, a job brokerage scheme established by four BIDs in Southwark and Lambeth: Better Bankside, Team London Bridge, We Are Waterloo and Vauxhall One. Launched in 2011, Employ SE1 now employs two staff and advertises over 100 vacancies a month. As of June 2015, the project had 300 local employers registered and was advertising more than 200 jobs.

Cross River Partnership, the public-private partnership comprising both boroughs and BIDs, also set up and manages Recruit London, supported by the New West End Company and Westminster council, along with landowner partners the Crown Estate, Capital and Counties and Jobcentre Plus. The scheme uses landowner-hosted workplace coordinators to find and train job seekers for local vacancies. It is an inclusive service, with a recently appointed specialist available to provide support for candidates with additional needs such as health conditions, aligning it well with the proposed focus of the government's new Work and Health programme.

highlighted in the SWOT (see Section 4).

As members of Cross River Partnership, a group of central London BIDs has gone furthest within a sub-regional partnership structure to demonstrate the value of BID collaboration and take successful pilot projects to scale. Eight boroughs and 15 BIDs are members of CRP, each with a place on the board, alongside the GLA, London and Partners, TfL, Network Rail, and voluntary-sector representa-

tive Groundwork London. This politically neutral shared space is key to helping BIDs and boroughs work with other strategic partners on a common agenda.

Providing project management resources and specialist expertise to support the BIDs, CRP is also experienced at leveraging additional income from the GLA, TfL, Department for Work and Pensions and European Union Structural Funds. The BIDs each pay an annual membership fee to

CRP of £3,000 (local authorities pay £10,000), providing a core income for 2015/16 of £102,000. Between 2012-15, for every £1 paid in membership fees, CRP leveraged £45 in external funding. The Greening the BIDs project (see Victoria BID case study, Section 6) and the Clean Air Better Business initiative (see Box 6) illustrate how working in partnership helps local authorities, BIDs and the voluntary sector have a significant impact on London's key policy priorities.

7.3 Summary

As the “new kids on the municipal block”,⁴⁵ BIDs are having to find their feet in a fast-changing environment for both local government and wider governance arrangements in London. In these uncertain times, it will be BIDs with an enterprising mindset, political nous, an open and supportive relationship with their local authority and a propensity to collaborate with others which succeed. Figure 10

shows that many BIDs are already aware of this point and are up for the challenge. As new BIDs continue to emerge whilst others mature, the London BID community will become increasingly diverse. This will require a variety of support arrangements and partnerships – both area- and issue-based – to help BIDs maximise their contribution to London's policy priorities.

BOX 6

Clean Air Better Business

Clean Air Better Business (CABB) is an initiative led by Cross River Partnership (CRP) and funded by the Mayor's Air Quality Fund Round 1, with match funding from 15 BID and local authority partners. Poor air quality is a major problem for London. Recent research commissioned by the GLA and TfL suggests that it is responsible for the early deaths of over 9,500 people a year in the capital. The CABB programme brings together public and private partners to deliver a number of projects aimed at mitigating harmful emissions from transport, particularly from the freight industry and London's taxis.

In addition to awareness-raising and nudging behavioural change among the business community, CABB's outputs have included delivery and servicing plans for businesses to reduce trips and emissions, a zero- and low-emission supplier directory, travel-to-work planning, a pool bike scheme and the development of an air quality widget for inclusion on individual BID websites.

The scheme works on the principle that better information, resources, and joint working not only reduce air pollution, but also deliver efficiencies and savings for partners. CRP has applied to the second round of the Mayor's Air Quality Fund in order to expand its activities and offer more services via the BIDs.

8 CASE STUDY South Bank BID: delivering services within a wider strategic partnership



Established	2014
Businesses	184
Staff	Nil
Levy income	£450,000
Additional income (source,value)	Significant income generated through other (re) investment mechanisms that operate in the South Bank area, such as the London Eye section 106 agreement.

8.1 Background

South Bank is one of the newest London BIDs, servicing one of the city's most vibrant and popular destinations for Londoners and visitors. The BID was proposed and developed by the South Bank Employers' Group (SBEG), a partnership of 18 major employers which has operated in the area for 25 years, having come together to lead the regeneration of an area tagged as "cardboard city" for its rough-sleeper encampments, dilapidated public realm, and rising levels of crime.

SBEG secured a GLA grant to help set up the BID and successfully balloted local businesses in 2014. Straddling

the Lambeth/Southwark boundary, South Bank BID is part of a chain of south London BIDs stretching from Vauxhall to London Bridge.

The redevelopment of the South Bank since SBEG was established has been hugely successful, with the number of visitors per year increasing from three million in 2000 to an estimated 25 million in 2015. A victim of its own success, the area is now seen as a 'neighbourhood under pressure', also the title of the South Bank Partnership's 2014 Manifesto and Action Plan.⁴⁶ The BID was created as one way to relieve some of that pressure,

by engaging a wider range of businesses in area development, service design and delivery.

SBEG provides the BID with management and operational support, along with access to well-established revenue streams plus the expertise of the South Bank Partnership, a group co-chaired by the two local MPs and including all key stakeholders in the area's management and development.⁴⁷ Whilst the BID has a board separate from SBEG, it has no staff, and maximises value to levy payers by keeping overheads low.

8.2 Impact and value

South Bank BID reports quarterly to members on indicators such as crime rate, footfall, environmental indicators and savings to businesses. It is distinct – and has considerable potential – in operating within the regeneration context of a key commercial and cultural district of inner London, and across two boroughs.

As one of several organisations which is committed to the vision and aims of the South Bank Partnership, the BID both benefits from and contributes to the management and regeneration of the area. One example is how the BID contributes funding, in addition to revenues SBEG receives from the London Eye section 106 agreement, for extra neighbourhood policing. Another is how BID members tap into the

valuable South Bank brand, managed by SBEG's marketing team, and can use its visitor data and analysis at no cost, or list on SBEG's popular south-banklondon.com website,⁴⁸ with its high traffic. As a next step, SBEG is looking at innovative ways to monitor visitor patterns and experience, making this data available in a way which demonstrates clear public benefit.

8.3 Relationship with the local authority

Most of the South Bank BID is in Lambeth, though a small area falls within Southwark. In accordance with legislation regarding cross-boundary BIDs, Lambeth is the lead authority and was responsible for the ballot, with Southwark the consultee. The BID has separate operational and base-line agreements with each borough. Regular, constructive meetings are held with Lambeth and Southwark councils, and the South Bank BID

board has councillor and officer members from both. South Bank BID is an active member of the Lambeth BID forum, a discussion group which focuses on common interests, including the identification of opportunities for BIDs to take on borough service contracts as they come up for renewal.

In 2014, SBEG secured a grant from the government's Community Right to Challenge Fund to build skills in secur-

ing local service contracts, provided they relate to its primary focus on ensuring that the South Bank is clean, safe and well-managed. The training supports SBEG's discussions with Lambeth and others on the opportunities and challenges of the devolution agenda, including maximising the BID's potential.

8.4 Examples of innovation – New employment initiatives and Living Wage South Bank

SBEG has supported local employment initiatives for several years and was instrumental in setting up and managing the *Waterloo Jobshop*⁴⁹ in 2002. The SBEG chief executive is keen to use the South Bank BID to extend the reach of the Employ SE1 job brokerage (currently supported by four BIDs south of the river – see Box 5) and explore the potential of a South Bank Apprenticeship Programme.

BIDs have been identified as a way to drive up the number of employers paying the London Living Wage by promoting it to members. The London Assembly's 2014 report, 'Fair pay: Making the London Living Wage the norm',⁵⁰ highlighted Team London Bridge and Vauxhall One as examples of good practice, nudging employ-

ers by making the Living Wage the default entry-level pay rate on the Employ SE1 job brokerage site.

In collaboration with the Living Wage Foundation and London Citizens, South Bank BID has started Living Wage South Bank. Moving from an initial concept of a Living Wage Zone and the notion of a defined geographical area with rules around compliance,⁵¹ Living Wage South Bank is a commitment to support employers to work towards accreditation as a Living Wage employer. The redesign reflects some of the lessons and learnings from work in other potential zones which ultimately struggled because many businesses, especially small retailers, could not meet the criteria whereby 75% of businesses must pay

the living wage, with the zone working to make this 100%.

The new approach remains innovative, but is also more achievable in terms of securing both large and small employers' buy-in. The resource to support this work will be channelled through SBEG, drawing on funding from the South Bank BID, charitable trusts and business sponsors; it will be delivered with support from London Citizens, the Living Wage Foundation and the GLA, which will provide senior office time and strategic leverage through the Mayor's Office.

8.5 Lessons

Few BIDs in London have the luxury of operating in the way South Bank BID does, tapping into the experience, resources and infrastructure of an established business-led regeneration partnership. It is an example of how, as approaches to inner-city regeneration adapt to changing fiscal

circumstances and new political priorities, a BID can be a useful vehicle of business engagement alongside other stakeholders and multi-agency partnerships. SBEG and the South Bank BID are looking to collaborate with others in order to develop, test and roll out new approaches to place-

management and area regeneration. As the concept of Living Wage South Bank moves ahead, there is a readiness to work with other BIDs and local authority partners on its potential replication.

9 BID MANAGEMENT AND GOVERNANCE

As BIDs deliver more services and become more visible, they will come under increasing public scrutiny. The industry recognises this. In the light of the government's review of BIDs in 2014,⁵² British BIDs acknowledged:

*"increasing concerns raised regarding transparency and accountability of BIDs. With an industry nearly a decade old, it is no longer good enough to rely just on a 'leap of faith' but instead high quality professionalism targeted at benefiting those who pay must be paramount."*⁵³

Evidence gathered for this review suggests that, by and large, London's BIDs are up to the challenge and in many cases their pursuit of good governance goes beyond accounting to levy payers.

9.1 Transparency and accountability

London's BIDs vary in size and geography, membership and priorities, and their activities reflect that. However, there are areas in which greater consistency would be beneficial, including governance.

BID managers acknowledge the value of the GLA-funded 'BIDs Handbook' which, echoing British BIDs' guidance, recommends a number of measures to ensure BIDs are accountable and transparent.⁵⁴ It is in BIDs' interests to demonstrate high standards of governance from the outset, to reassure pri-

vate and public partners that they can confidently engage and support BIDs

Transparency and accountability assume even greater importance when BIDs take on additional services and responsibilities. If these are under contract to the local authority, the BID also becomes subject to Freedom of Information requirements.

A national high-street retailer which is a member of several BIDs in London is aware that they are at a key moment in their development:

"At their best, BIDs can be genuine drivers of change and catalysts for renewal, growth and jobs, [but] the consistency of their delivery is mixed. The government is keen to empower BIDs further, however any development towards additional powers needs to be accompanied by greater transparency and accountability for those that pay."
– BID chair and senior manager at national retailer

9.2 Quality standards and accreditation

Acknowledging that some BIDs in London have work to do on governance, one CEO put it bluntly: "My chair has been in post too long, but he isn't going anywhere." Many are more proactive. Croydon BID, for example, following its successful second ballot in 2015, initiated a major governance review which involves benchmarking practices against the UK Corporate Governance Code⁵⁵ and installing a senior independent director and an audit committee to increase transparency and inject some new blood.

Croydon has also been accredited by British BIDs, one of 13 London BIDs to do so (out of 23 nationally). Accreditation is a five-stage process involving elements of self-assessment and an independent audit leading to external verification.⁵⁶ This assesses all aspects of a BID's work, including governance, management and operations,

finances, performance management, communication and reporting. Similar to standards like Investors in People, the accreditation costs between £1,875 and £2,500 and lasts for three years, after which a full reapplication is required.

"Accreditation ... is a mark of the robust and transparent governance that underpins our organisation providing assurance to our members and stakeholders."
– London BID CEO

"With the BID industry still relatively young and not always well understood, we feel accreditation is especially important in setting straight those who do not appreciate the significance and substance of the industry."
– London BID CEO

Few smaller London BIDs have been accredited, but an exception is Love Wimbledon, whose chief executive saw this quality mark as demonstrating the organisation's professional capabilities to national retailers such as Boots and Marks & Spencer.

Team London Bridge found seeking accreditation useful the first time around, as it challenged the BID to exceed the minimum standard. However, the BID found the process less helpful the second time. This suggests that there is an opportunity for the reaccreditation process to reflect better the changing needs of more mature BIDs, which would also address a common refrain among BIDs that it is hard to apply a one-size-fits-all approach.

9.3 BID staff and management

To date, BIDs have attracted executive and front-line staff with a range of backgrounds. These include regeneration professionals, local authority officers, town centre managers, marketing, event management and communication specialists. BIDs' different origins, priorities and ambitions account for some of this diversity, but the sector is also starting to standardise skills and training.

Professional development

The growing number of people making a career in BIDs has generated demand for a learning and development framework, which has been recognised by the industry. British BIDs provides its members with the opportunity to develop and accredit staff skills, through a post-graduate-level Certificate in BID Management.⁵⁷ Since the launch of the course in 2013, 23 BID staff have graduated, including 11 from London.

Another driver for continuing professional development is likely to come from growing external expectations. As more BIDs move into place-shaping, neighbourhood planning and regeneration, in addition to place management and marketing, they

will require different skills. However, survey responses suggest that the make-up and number of staff have not changed significantly since 2012.

London's BIDs remain lean organisations. As Figure 14 demonstrates, 70% of BIDs have five or fewer full-time staff.⁵⁸ BID chief executives cite the need to minimise overheads to provide value for money to members and ensure that revenue is spent on services. As the nature and mix of these services change, BID leaders will have to consider how to balance overheads and effective delivery.

One option is for BIDs to share back-office services; another is to use specialist consultants to advise on particular issues. Six BIDs in London currently employ at least one full-time consultant, whilst 16 engage consultants on a part-time basis.⁵⁹

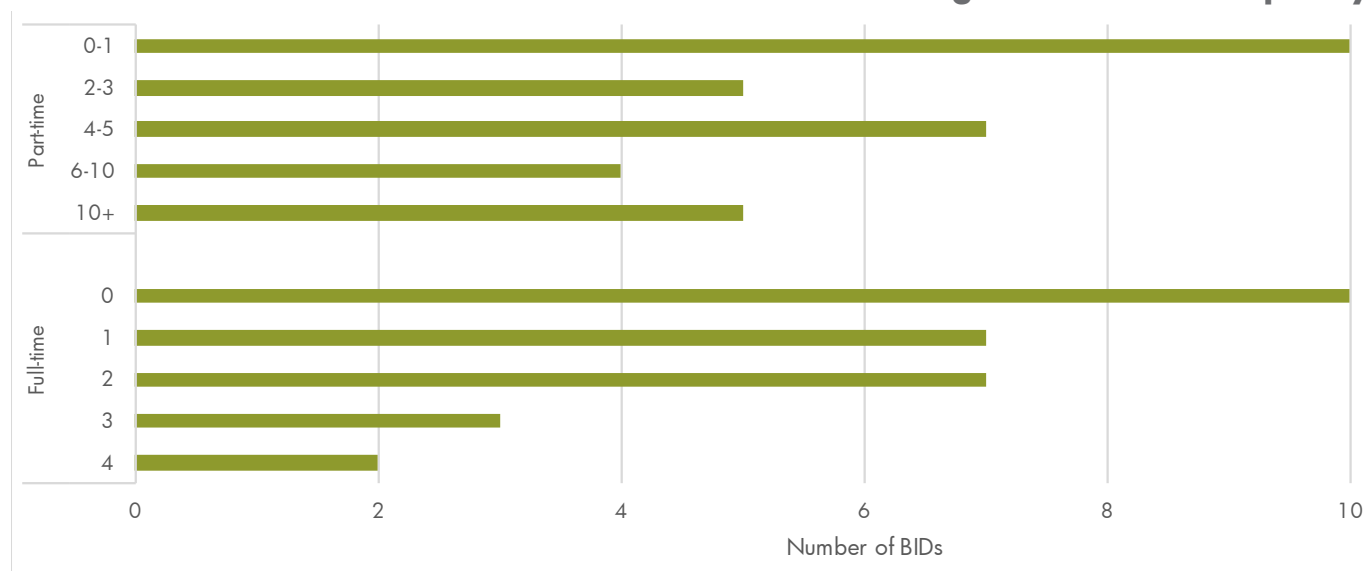
Role of consultants

A small number of specialist consultancy organisations provide management services to around a quarter of the town and city centre BIDs in London. Their systems for setting up and managing BIDs offer efficiencies and economies of scale which are attrac-

tive both to local authorities looking to initiate BIDs and – by providing the management team – to cost-conscious business members once the BID is in place. Some interviewees suggested that the prominence of a few BID management specialists may be limiting the development of more permanent skilled professionals fully embedded within a BID.

This management model does, however, provide these BIDs access to a level of staff resource and expertise which are out of reach for small or start-up BIDs. Indeed, it also brings into focus the question of a BID's optimum size, and the long-term viability of smaller BIDs where the levy income cannot support a sufficient management team. Nevertheless, it is unclear whether BID boards which choose to outsource their management are reviewing and re-tendering these contracts (eg at the start of each five-year term) to be sure they achieve best value for money.

Fig.14: BID Staff Capacity



Source: Survey responses.

9.4 BID boards

British BIDs' guidance states that: "The overall governance of the BID should be representative of the business area covered by the BID."⁶⁰ However, as London's BIDs evolve, there are signs that their adherence to this principle is beginning to change.

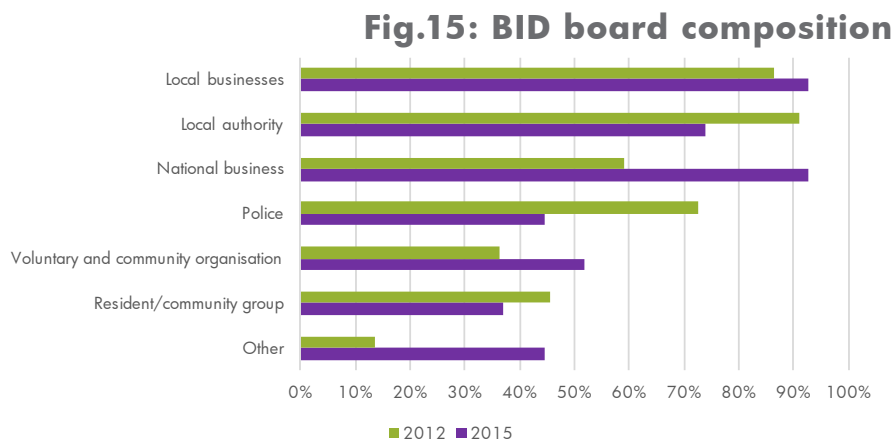
Several CEOs of older BIDs note that in the formation and early days of the BID, it was important in establishing credibility that the board represented its levy payers and that members were drawn from different sectors (SMEs and larger businesses, independents and national retailers). However, once the BID has shown its capacity to enhance essential services for members and begins to take on a more strategic and influencing role, knowledge and skills requirements – and demands on board members – change.

There has been relatively little change in the average size of BID boards (12 members in 2012; 13 in 2015). However, as illustrated in Figure 15, possibly reflecting the growing maturity and diversification of BIDs, there is a shift in the composition of boards, including a decrease in local authority representation and an increase in

the representation of larger national businesses.⁶¹ More than half of BIDs surveyed report that they now have a local voluntary/community organisation on the board, up from just over a third in 2012.

More than 480 business representatives sit on BID boards across London.⁶² The level of business engagement with BIDs is significant and is indicative of the value levy-payers attach to the BID. Most of the larger CAZ BIDs attract senior managers and directors from blue-chip companies, to work alongside owner-manag-

ers of smaller firms. However, many BIDs – even some of the high-profile ones – have found sustaining board member engagement a challenge, despite having terms of reference setting out expected levels of attendance and involvement. As a response to this, Victoria BID decided in 2012 to recruit and pay a part-time executive chair, and is also now considering paying board members in recognition of the increasing demands on their time.



Source: Survey responses.

9.5 Managing conflicts of interest

The recent establishment of three new property owner BIDs in central London on the same footprint as existing occupier BIDs (the New West End Company, as well as two within the Heart of London Business Alliance) presents a new governance challenge. There may be occasions when occupiers' and owners' interests do not align. The former are more likely to be concerned with BID services, which address the area's current needs; the latter will have more of an eye on the long term, and the BID's potential to increase property values.

The chief executives of London's property owner BIDs are confident in their governance models. In HOLBA, the

levy from every member business (occupiers and owners) is pooled, funding a variety of interventions across both BID areas; by contrast NWECA ring-fences the levy for each of its streets (Oxford Street, Bond Street and Regent Street), reflecting the tradition of their strong and independent street associations and the need to work with the grain of local community politics and existing structures.

Baker Street Quarter Partnership, although not a property BID, is something of a hybrid set-up, established in 2013 with strong backing from the Portman Estate. Voluntary contributions from landowners make up £100,000 of its income each year,

supplementing £1.05m from the levy on occupiers. The BID has separate boards for owners and occupiers, with representatives of both on a BID directors' board. This structure was set up partly to accommodate the large number of property owner members of the BID, but also to ensure that owners and occupiers can discuss issues separately in a safe space. The BID's experience to date suggests that combining the interests of both groups is feasible.

Many central London BID boards have a strong representation from major developers. Several BIDs are being increasingly drawn into planning (in or adjacent to their areas) through

Neighbourhood Forums and their development of Neighbourhood Plans; this is fertile ground for conflicts of interest. A number of responses to the Department for Communities and Local Government BIDs consultation flagged this issue, stressing the requirement for clear governance structures to avoid giving unfair commercial advantage or influence to individual BID members, even if

they can bring considerable financial resources and expertise to the table. BIDs do seem increasingly aware that, in facilitating the work of Neighbourhood Forums, they must be clear on whether they are representing the interests of the neighbourhood as a whole, or of their levy payers, whether owners or occupiers.

9.6 Local authority representation and engagement with BIDs

As a manifestation of localism, BIDs reflect both its strengths and weaknesses. Empowering business communities to become involved in shaping places has brought new energy and ideas to town centre management and area-based regeneration. London's BIDs are, however, unevenly spread, which has led to a patchwork of models.

The piecemeal emergence of BIDs in London means there is no standard approach to local authority representation on boards; even in the same borough, council representation can vary from one BID to the next. In Camden, different arrangements exist with each of the borough's three BIDs (Camden Town Unlimited, where a cabinet member, but no officer, is on the board; The Fitzrovia Partnership, which has both a cabinet member and officer on the board; and Inmidtown

where the board includes the local ward councillor and an officer).

The same story is repeated across London, with widely varying levels of council representation on BID boards, in terms of whether officers and/or elected members are on boards; whether members are portfolio holders or ward councillors; and whether the council's representatives have voting rights or observer status.

In 2015, Westminster council, following consultation with its BIDs, introduced a policy that no elected member or council officer would sit on a BID board. This has brought greater consistency and openness in the authority's relations with its BIDs, signalling a new phase in their working relationship.

The council had recognised that as BIDs develop their capacity to deliver

council services, independence is key. Communication occurs in other ways, such as the BIDs' regular meetings with the leader of the council. Whilst this is clearly an arrangement which works for Westminster, structures for engagement and representation will continue to vary from borough to borough.

BIDs tend to have relationships with different council departments (town centre management, economic development, electoral services, business rates) and their services intersect with even more (public realm, community safety, waste management, skills and employment). It is not easy for a small BID team to maintain a dialogue with everyone across the council, so having a senior-level single point of contact with the local authority is invaluable.

9.7 Community engagement

Most BIDs in this review recognise the governance implications of their changing relationship with local authorities. As they become fixtures in more London communities, and take responsibility for the delivery of more local services, BIDs will be accountable to a far wider constituency than their levy payers.

This presents a dilemma: on the one hand, as many chief executives and their board members are quick to point out, BIDs are first accountable to levy payers, which is what makes

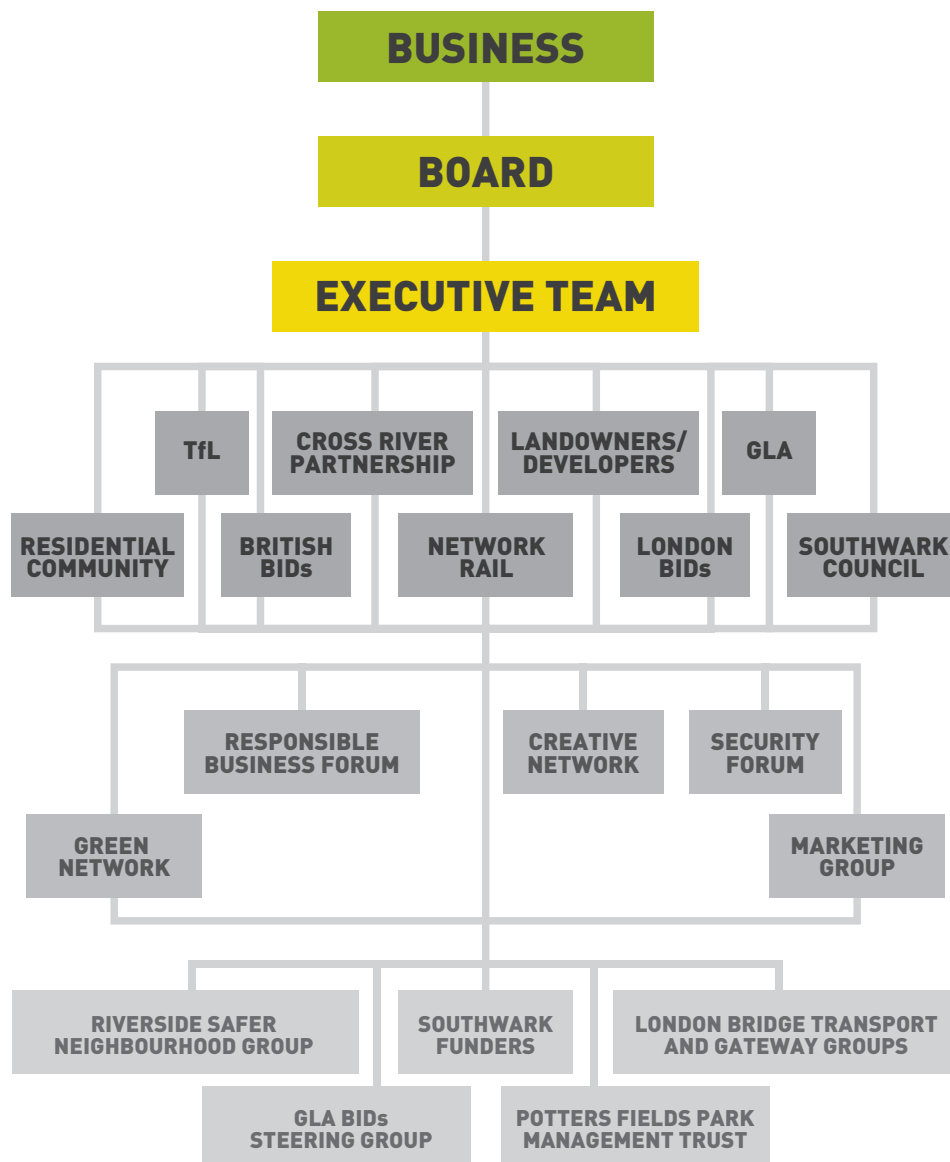
them distinctive as organisations. On the other hand, BIDs are under increasing pressure to review their governance to accommodate representatives from the wider community.

BIDs can cite council representation on boards (where this exists) as providing a voice for the community. However, this may not suffice as BIDs continue to develop. Most BIDs have significantly increased their use of print and social media in order to communicate beyond their membership. A number of BIDs such as Better

Bankside, Brixton BID and The Fitzrovia Partnership now have a community representative on the board.

Indeed, BIDs like Angel have intentionally positioned themselves as community-based organisations. Others, like Team London Bridge, include the residential community alongside other stakeholders in their structure (see Figure 16).

Fig.16: Team London Bridge organisational structure



Source: Team London Bridge, Business Plan 2016-21.

9.8 Summary

As London BIDs take on additional responsibilities for place-making and associated service delivery, their management and governance will increasingly be tested. This presents economic development practitioners and BID leaders in particular with the challenge of managing complexity and a number of paradoxes:

- How to continue to keep BID overheads low whilst responding to opportunities to deliver more services, either on behalf of local authorities or in partnership with them.
- How to retain the essence of a BID as a business-led agency in local development at a time when BIDs are under increasing pressure to open governance and involvement to the wider community.
- How to increase the transparency and accountability of BIDs without burdening the organisation with disproportionate bureaucracy, which risks losing businesses' interest.
- How to ensure councils and BIDs can work effectively towards shared strategic objectives, whilst recognising that their interests will not always be aligned.

10 CASE STUDY Love Wimbledon: the BID as a convenor and enabler



Established	2010; mandate renewed 2015
Businesses	420
Staff	5
Levy income	£1,516,970
Additional income (source,value)	£28,000 (businesses £9,000, including £2,000 voluntary contributions; property owners £5,000; sponsorship £14,000)

10.1 Background

The Love Wimbledon BID is funded by over 70% of the 600 businesses in Wimbledon town centre with a rateable value of at least £20,000. In 2015, the BID was accredited by British BIDs, which the chief executive says is important in securing the confidence of major high-street retailers. The BID provides a range of services to members, who are sustaining Wimbledon's place as one of London's most popular shopping and business destinations and one of its busiest transport hubs, combining tube, rail,

tram and bus services. Membership benefits are clearly spelled out and range from communications and marketing support (including a Wimbledon Privilege Card) through access to shared services like recycling, to regular networking events and free membership of Merton Chamber of Commerce.

Like most small town-centre BIDs recently established in London, Love Wimbledon has paid considerable attention to the improvement of the pub-

lic realm ("any start-up organisation has first to earn trust and establish its track record"). The BID has actively used its baseline agreement with Merton council to ensure that agreed standards of service are maintained, in spite of financial pressures on the borough. The BID has no desire to take over or maintain council services, since its offer to businesses is focused on providing additional value.

10.2 Impact and value

Love Wimbledon reports quarterly on crime rate, footfall, environmental indicators, satisfaction of members and the public, and quantifiable savings to businesses. The BID also holds an annual consultation event for all stakeholders, which helps set priorities for the year and engages a wider range of community interests. The BID uses social media as an increasingly

valuable two-way communication tool for members, who tend to use Twitter during the workday, and for the wider Wimbledon community, which comes alive on Facebook in the evenings.

The BID's chief executive acknowledges how difficult it is to tie economic impact directly to the BID, partly because there is an automatic contrast

between the BID area and its residential surroundings. Love Wimbledon co-operates with the Wimbledon Village business association, which operates outside the BID area, but its core constituency is its business membership in Wimbledon town centre.

10.3 Relationship with the local authority

Love Wimbledon proved its value early through its work with Merton council and Transport for London. Soon after the BID's formation, the council approached Love Wimbledon to form a partnership project called *Future Wimbledon*, a major exercise in developing a vision and long-term strategy for the town centre.⁶³ The process began with the *Future Wimbledon* conference in 2013, including presentations from architect Richard Rogers and entrepreneur and TV personality Theo Paphitis who has a base in Wimbledon, and political leaders from the GLA and Merton council.

The BID then partnered with the council's regeneration team in 2014 to run an international design competition with New London Architecture and the Commission for Architecture and the Built Environment to attract ideas for the town centre from architects, artists, students and community groups.⁶⁴ As well as the main competition, which attracted entrants from Wimbledon to New York, the BID also organised a local schools' competition which received nearly 150 entries from young people.

The *Future Wimbledon* visioning exercise, whilst serving as a backdrop to town centre masterplanning, also demonstrated the effectiveness of the BID as a champion for Wimbledon as a place. Like other councils, Merton manages a diverse range of town centres, so it is incumbent on the BID to sustain the council's interest in addressing Wimbledon's needs. Merton council recognises the strategic importance of Wimbledon as an employment hub and inward investment brand and retains a close working relationship with the BID, and a senior council officer has an observer role on the board.

The BID's convening and enabling role has since extended considerably in response to a major economic development challenge for the town centre in the form of Crossrail 2, a significant factor in Wimbledon's future development. Given the town centre's status as a key transport hub, Love Wimbledon has, from its outset, forged a close and highly productive working relationship with TfL, for example, using poster sites to promote the town centre and providing

a conduit for TfL to the local business community.

On a more strategic level, the BID lobbies the Crossrail 2 team, keeping businesses informed of emerging plans for Wimbledon through regular meetings, and working behind the scenes to share the views of local stakeholders. Crossrail 2 Managing Director Michèle Dix spoke at a meeting convened by Love Wimbledon and attended by over 80 businesses and landlords, council senior management, councillors and Merton Chamber of Commerce.

The BID also hosted a land owner forum, again in partnership with Merton council to represent the views of land owners and investors in Wimbledon as part of the Crossrail 2 conversation. Following interventions coordinated by the BID, Crossrail 2 has since published clearer information for Wimbledon businesses and residents on the potential phasing of the nine-year project, to minimise disruption.

10.4 Lessons

Largely as a consequence of the BID's work, local conversations on Crossrail 2 have moved from a negative standpoint, encapsulated in one levy payer's comment, "Welcome to blight," to the more positive intention to harness the investment opportunity from Crossrail 2 to enhance the town

centre in line with the council's emerging *Future Wimbledon* vision. Love Wimbledon is keen to learn from the successes and challenges of Crossrail 1, and engage with those involved, including other BIDs along Crossrail routes (see Section 11).

11 SUPPORT FOR BIDs IN LONDON

The Mayor and the London Enterprise Panel (LEP) have strongly endorsed the concept of BIDs and their role in the place-shaping of town centres across the capital. In his 2012 manifesto, Boris Johnson committed to “support the creation of further BIDs, working with boroughs and businesses to double the number to 50 in the next four years, focusing on town centres such as Bromley, Enfield, Richmond and Romford.”⁶⁵

To achieve this objective and take forward the recommendations of the GLA’s subsequent review of London BIDs,⁶⁶ the LEP committed £660,000 to enable the establishment of new Business Improvement Districts, as well

as continuing to support existing BIDs. This section considers the impact of the grant programme and how investment under a new mayoralty could further develop BIDs’ work as local partners in the economic development of London.

Although London contains nearly 25% of BIDs in England, this does not mean it has reached saturation. Several of the 14 boroughs without a BID are considering their feasibility, particularly ones with ambitious local economic growth strategies, such as Haringey, Lewisham, Tower Hamlets and Wandsworth.

Nevertheless, the 50 BID milestone is a good moment for the GLA and LEP and their partners to reflect on how to increase BIDs’ collaborative impact, rather than necessarily continuing to incentivise the setting up of more BIDs.

As this review has highlighted, there are examples of successful smaller BIDs operating largely autonomously and with modest amounts of levy income. However, the cuts, levies and funding policies mentioned throughout may quell the appetite for more BIDs. This strengthens the case for switching the focus of future support to enabling the work of existing BIDs.

11.1 Convening

The GLA/LEP’s engagement with the capital’s BIDs has largely continued what started under the London Development Agency (LDA). Having invested in the Circle Initiative,⁶⁷ the pilot UK BIDs programme, the LDA subsequently supported a London BIDs platform to enable networking and sharing of best practice.

Since 2012, the GLA, supported by a steering group including 12 BIDs, has convened regular network meetings to showcase BID work. This has included twice-yearly meetings open to all London BIDs, local authorities and other stakeholders, including TfL and the Metropolitan police. From 2012-15 these were chaired by Kit Malthouse AM, then Deputy

Mayor for Business and Enterprise. Several BID chief executives commented on the value of this, but recognised they also have to engage with other directorates and parts of the GLA family.

11.2 Grants and loans

Since 2014, the London Enterprise Panel has provided £660,000 largely to support the setting up of new BIDs. Grants of £30,000 per applicant have been based on research suggesting that initial BID set-up costs are in the range of £60-100,000. A BID sponsor has to be less than 12 months from a ballot and able to show evidence of:

- stakeholder engagement
- community support
- communication with TfL and the Mayor’s Office for Police and Crime
- project management experience

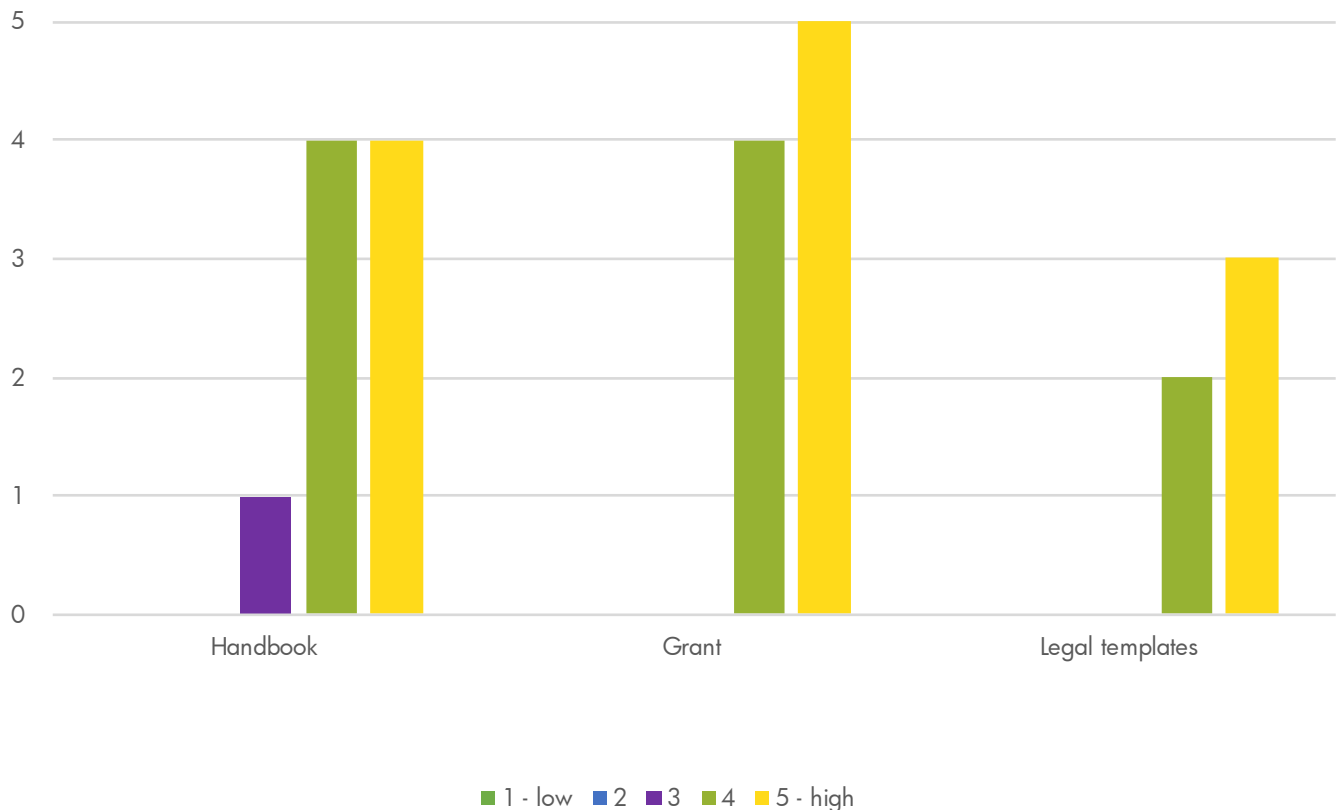
The GLA has also required 50% match-funding as an indication of local support from the council and/or business community. By February 2016, the LEP had funded 16 new BIDs (of which 10 have already balloted successfully).

In the main, interviewees and survey respondents had positive views of the grant programme (see Figure 17), although some said future resources might be better spent consolidating what has been achieved now that the Mayor’s 50-BID target has been reached. Indeed, some experienced BID practitioners also questioned whether the push to reach 50 by spring 2016 may have put an unhelp-

ful emphasis on quantity over quality of new BIDs.

The Department for Communities and Local Government also has a £500,000 fund, administered by British BIDs, which loans up to £50,000 to help set up new BIDs. To date only two London BIDs have applied for a loan; however, this could remain a useful alternative source for start-up BIDs in the capital, should GLA/LEP funding be focused elsewhere.

Fig.17: BIDs reporting on the usefulness of GLA/LEP resources



Source: Survey.

11.3 Legal templates and handbook

In tandem with the grants programme, the GLA commissioned a law firm to review and update a set of legal templates for use by BIDs.⁶⁸ It also had an experienced BID management company produce a handbook on setting up and running a BID.⁶⁹ Again, the survey of BIDs showed strong approval of these documents (see Figure 17).

However, not all BIDs were aware they existed, and some interviewees thought that the GLA BIDs web page could be used to promote live case studies and examples of good practice.

11.4 Regeneration funding

Several London BIDs have worked with the GLA's Regeneration team, with its strong focus on town centre and high street regeneration. BIDs were not eligible to apply directly for the 2011-12 Outer London Fund or the 2015 High Street Fund, but some received funding from applica-

tions submitted by local authorities, including Bromley (Orpington First) and Camden (Camden Town Unlimited), both featured in this report.⁷⁰ Waterloo Quarter (since rebranded as We Are Waterloo) also received funding through Lambeth council's Portas Pilot grant.⁷¹

For the 2015 London Regeneration Fund, BIDs were invited to submit applications themselves. Of the 69 applications, five were from BIDs but none were successful. BID chief executives have suggested that more dialogue with GLA officers and feedback on unsuccessful applica-

tions would be useful, particularly as BIDs become more ambitious and look to access new sources of income. The GLA's good practice guide to applying for funding,⁷²

though not specific to BIDs, does address some of the issues raised by interviewees, which suggests that the information could be more widely disseminated.

11.5 Future support

BIDs' increasing diversification seems to call for greater segmentation of the sector, enabling BIDs to collaborate on different priorities and issues. There is also an emerging case for BID groups to be linked to sub-regional devolution proposals, particularly if this increases the level of business involvement in these partnerships.

This research has identified a number of potential pilot projects on which BIDs could collaborate over the next 12-24 months, with a view to increasing the scale and impact of a particular initiative and addressing current priorities for London and the incoming mayor.

Employment and training

A number of London's BIDs are already involved in local employment initiatives, brokering jobs and training opportunities with member companies and employers in their area for local residents and unemployed jobseekers. Some of these, such as Employ SE1 and Recruit London (see Box 5), are joint programmes across several BIDs. With the government's focus on driving up apprenticeships, and the mayor and London Councils' pushing for more influence over employment and skills funding for the capital, there is a window of opportunity to engage a group of BIDs in the design and delivery of more business-facing employment services targeting particular areas and sectors of the capital.

Regeneration

Several BIDs have shown their ability to be a catalyst for urban regeneration, articulating a strong business case, convening appropriate public/

private and voluntary sector partners and assembling the necessary funding.

The GLA and TfL have an opportunity to prioritise projects which bring BIDs together. The Low Line proposal is one example.⁷³ Another is harnessing the regeneration opportunities and sharing experience from the redevelopment of mainline stations which currently preoccupies several BIDs, including Team London Bridge, South Bank BID, We Are Waterloo, Euston and Victoria BID. A number of these BIDs have said how, in contrast to their relationship with TfL, it has been difficult to engage Network Rail as a partner; with the mayor's increasing influence over national rail services within the capital, now may be the chance.

Corporate Social Responsibility

BIDs also broker engagements between members and local voluntary and community-based organisations. These include fundraising, mentoring, in-kind resources and employee volunteering. These often operate in isolation, at a time when there is growing interest from funders such as City Bridge, Big Lottery and the GLA (through Team London) in providing strategic-level support and coordination to maximise place-based giving. London's Giving, building on the Islington Giving pilot, is looking to support place-based giving initiatives in the following areas, several of which have a BID: Kingston, Camden, Hammersmith, Twickenham, Sutton and Southwark. London's designation as European City of Volunteering for 2016⁷⁴ is an added incentive for

the GLA to provide greater strategic coordination to this array of corporate social responsibility.

Crossrail

TfL has been working with several BIDs as conduits for communicating with businesses and local communities to mitigate the disruption from the construction work on Crossrail and the likely impact of Crossrail 2. The Crossrail projects provide another focus around which to develop collaboration between existing BIDs, as well as with BIDs which may now emerge at town centres which will be linked and redeveloped as a result of Crossrail.

Financial innovation and new local investment funds

As government grant funding for local economic development becomes increasingly competitive, more ambitious BIDs may look to pilot alternative financial instruments, such as local area investment funds or social impact bonds, in order to maximise their leverage over alternative sources of investment. This will have implications for the skills and capacity of BID management teams, as well as the appetite for risk among BID boards, but it may be something which the GLA and participating boroughs would be willing to support and, if necessary, underwrite.

12 CASE STUDY Orpington First: the BID as innovator and catalyst



Established	2013
Businesses	320
Staff	5
Levy income	£151,000
Additional income (source,value)	£127,775 (Local government £12,775; High Street Fund £25,000; New Homes Bonus £50,000; sponsorship £10,000; promotional space and events £15,000; sub-letting property £15,000).

12.1 Background

Orpington First is a relatively small outer London BID, which evolved from the Orpington Business Forum, established in 2007. The forum, with a voluntary membership of around 50 local businesses, helped Bromley council develop strategy and ideas to benefit the town centre. The emergence of Orpington First is an example of how even a small BID, with an annual levy income about a

tenth that of London's largest BIDs, has had considerably more opportunity than its predecessor to influence place-making and local services. Situated at the edge of London, and of the borough of Bromley, Orpington First has developed a dual-facing role as the London-Kent gateway: one of the capital's town centres, but also accessible to Kent for tourism and as a market for Kent produce.

The BID's mission to help create a vibrant and commercially viable town centre. By working with partners to find appropriate solutions to the challenges facing Orpington, the BID ensures that its activity is adding value to levy payers' businesses, whilst securing additional resources to invest in opportunities that deliver wider community economic benefit.

12.2 Impact and value

The BID's chief executive is an experienced regeneration practitioner and is ambitious for the BID to do more than provide proficient town centre management services. She appreciates that in the current economic climate, the BID must deliver more than hanging baskets and Christmas lights if the town centre is to thrive. Orpington has suffered from the impact of out-of-town shopping centres, including Nugent (less than a mile away) and Bluewater, and the BID has had to identify innovative ways to revitalise the town centre and ensure its sustainability.

One of the four priorities of the BID's business plan is to make Orpington First "first for business". As part of this, the BID has developed an enterprise hub by subletting its high-street offices as affordable, flexible work-space, with conference and training facilities.

The BID's offices also serve as rest facilities for a new town centre police team, which the BID lobbied for and to which it contributes financially. In the absence of a town police station, this space means the team can stay

longer in the high street and facilitates day-to-day communication with the BID team.

The enterprise hub led to the BID partnering the council to secure GLA High Street Fund and New Homes Bonus funding for a programme of business training and development. Orpington First is the delivery partner of the Start Up, Step Up & Grow programme⁷⁵ aimed at would-be entrepreneurs, including women returning to work after maternity leave, offering risk-free opportunities to test business ideas in

the town's market, where the BID has a stall.

The BID has been at the heart of efforts to revitalise the town as a shopping destination and has engaged businesses, developers and landowners in efforts to revitalise the three-day-a-week outdoor market.

The BID is also working with Bromley college to develop an enterprise hub at its Orpington campus, enhancing the local food offer by connecting college catering (including a student-run bakery and restaurant) to the market.

The regeneration of the market also included the BID's taking over management of the public toilets from the council in 2014. The toilets received a complete renovation, including baby care facilities, plantings and notice boards. Maintaining high standards has become a challenge; the Walnuts shopping centre contributes 50% to the cost of cleaning, and advertising provides additional revenue.

The BID also engaged procurement specialists to help members save on group buying of items such as business supplies, services, utilities,

telecoms and waste management. This has been well-received and there are already members who have covered their BID levy with the savings.

Orpington First reports annually on performance. The chief executive admits that the BID could be better at reporting, and that standard indicators do not tell the full story, which – as in many BID areas – includes helping existing businesses benefit from town centre regeneration, including an eight-storey housing development and new cinema.

12.3 Relationship with the local authority

There is plenty of political will from the council for BIDs in Bromley to support the regeneration and management of the borough's town centres. This has resulted in significant resources (both financial and staffing) being dedicated to setting up the BID and an ongoing commitment to contributing as levy payer and partner. As well as Orpington, Your Bromley BID had a successful ballot in November 2015, and the council is investigating the feasibility for further BIDs in Beckenham and Penge.

In partnership with the BID and other stakeholders, the council is now leading in Walnuts Square public realm improvements. This follows a £2.1m council investment in a scheme to upgrade public realm and relocate the library, which has increased

footfall in the town centre. The council is involved in BID strategy and project development, through a senior officer and councillor's observer status at board meetings. At the same time, the council is fully aware of the BID's status as an independent organisation and the importance of treating it as such.

This is clearly a delicate balance to strike. The BID sees the relationship with the council as "something of a missed opportunity", which it attributes in part to council budget cuts. However, the council has made efforts to support the BID, and contributed funds from several pots to help advance its ambitions. Current collaborations include engaging members, developers and landowners to establish a planning strategy for

Orpington to identify inward investment opportunities whilst managing impacts, including those of permitted development rights.

Managing the transfer of the public toilets has encouraged the BID to look at other assets, including possible uses for the Priory, a Grade II-listed building which used to house the town museum and library. A petition with nearly 1,200 signatures indicated community opposition to its sale, and encouraged the BID to help galvanise a Friends' Group to nominate the Priory an asset of community value. This gave the community six months' grace to develop alternatives for the Priory, possibly as a self-sustaining cultural venue.

12.4 Lessons

Food is seen by the BID as an opportunity nexus for Orpington, wherein local restaurants provide work experience for college hospitality and catering students, and in turn have a ready supply of emergency staff cover, both in kitchens and front of house. The BID has also introduced a food festival and 'Foodie Friday' to showcase what's on offer.

The BID's role in saving or repurposing community assets has shifted efforts to save local amenities from a campaign footing to a business-led approach dedicated to finding commercially viable solutions.

The recent establishment of the larger Bromley BID signals that the council sees BIDs as a useful partner for both

revitalising and managing the borough's town centres. The Orpington First team is confident that having positioned the first BID in the borough as a connector of "business to business," "business to the local authority" and "business to the community", it is well-placed to collaborate – rather than compete – with other areas across the borough.

13 RECOMMENDATIONS

Quick wins

GLA:

- Continue to provide non-financial support (materials, officer advice, introductions, grant application guidance) to new and prospective BIDs
- Continue to offer start-up grants and prioritise BIDs in boroughs without a BID and/or areas which would clearly benefit from one
- Ensure that new and existing BIDs are aware of GLA resources, including the legal templates
- Commission an updated version of the BIDs Handbook to provide stronger guidance on governance
- Help BIDs promote themselves better, eg develop a case study bank promoting examples of collaboration and innovation
- Help BIDs engage more with all

GLA directorates and project areas

- Encourage BIDs and boroughs to collaborate on funding applications
- Convene a group to share experience and best practice on BIDs' engagement in Neighbourhood Planning
- Lobby/discuss with DCLG how to avoid BID board members gaining unfair commercial advantage in Neighbourhood Planning process

BIDs:

- Engage with boroughs regularly. Request a seat at the table when policy matters are being discussed, eg business rates devolution and taxes.
- Follow and share principles of good governance, such

as transparency, consistency, avoidance of conflicts of interest

- Set up piggybacking and mentoring relationships between established and new BIDs
- Make time to attend BID network meetings

Boroughs:

- Talk with BIDs about providing services before they become vulnerable to cuts
- Set up regular forums for BIDs within a borough to discuss shared interests, joint purchasing and other efficiencies
- Establish BID's main point of contact and ensure regular dialogue; allow officer time
- Use BIDs as a conduit to seek views of businesses and as a partner on consultations

Long-term

GLA:

- Encourage the creation of a risk register which identifies possible threats to all parties, and make this available in the GLA BIDs Handbook
- In collaboration with BIDs, trial a user-friendly impact assessment toolkit to measure social return on investment, and encourage consistent data-gathering from the beginning of a BID's lifecycle
- Develop a space for reporting BID performance/impact data within the London data store
- Establish a pool of freelance or seconded staff (akin to the GLA regeneration team's Specialist Assistance Team or the defunct CABE enabling panel) that BIDs can tap into for mayoral priority areas such as air quality, employment and skills

BIDs:

- Increase professional development for boards and staff, including using existing learning and development programmes
- Increase joint commissioning of services and sharing of back-office resources and professional expertise
- Explore links with relevant European city/BID networks and apply for relevant EU grant funding, eg through Access Europe
- Develop BIDs' collective voice as a vital business lobby, in a similar way to BIDs' lobbying on behalf of northern city-regions

Boroughs:

- Explore fiscal mechanisms that nurture local businesses, eg late night levy discounts or exemptions, SME business rates relief
- Integrate BIDs into town centre strategies
- Engage with BIDs to review baseline agreements together regularly, to anticipate changes and manage expectations
- Include BIDs in the development of service delivery plans
- Include BIDs in any relevant work of multi-borough or sub-regional growth partnerships
- Continue to support organisations which facilitate BID/LA collaborations

14 CONCLUSION

As an industry, London's Business Improvement Districts are still emerging. Some have become agents of economic growth and influence while newer and smaller ones may have to prove their value to members to survive business rates reform. It is a staggered field in which leading BIDs, trade bodies, partnerships and the GLA and LEP are working to bring along the whole – and there is potential to do much more.

This research has highlighted the growing number of BIDs of all sizes having a significant effect on – and beyond – their areas, bringing in vital investment and forging useful partnerships with the public and voluntary sectors. In addition to their traditional 'bins, banners and baskets' remit, BIDs are now directly involved in regeneration, placemaking, air quality and employment initiatives.

The 50-BID milestone is a fitting time to shift gears. BIDs' secure five-year revenue stream, flexible structure and government support are combined with local expertise and the practical focus required to serve business members. This affords them a unique ability to innovate and make tangible improvements at a time when local government is struggling to deliver basic services.

Many mature BIDs – particularly those approaching or already into their

third term – are already balancing private-sector priorities with effective relationships with host boroughs and local communities. This research has shown that ongoing and sometimes more formal dialogue can deliver real benefit to all parties.

There are challenges, of course. A BID is an independent entity which must first meet the needs of its business members. Community groups are apprehensive about BIDs' commercial influence over neighbourhood planning. The added cost of revalued business rates and additional levies could sap members' willingness to renew BID mandates. In terms of service delivery, this research has heard caution on both sides: BIDs are not keen to become default council delivery bodies, and voters can balk at transferring control to the private sector. Dialogue, as mentioned above, is the key, along with greater transparency and an industry-wide commitment to professionalism.

These challenges are also the place to use and strengthen BIDs' influence as a collective voice for London business – including the consumer draws of retail, tourism and leisure, which must be heard alongside financial services, property and tech. Many BID members have the ear of government leaders, and that lobbying weight, bolstered by trade bodies British BIDs

and ATCM and groups such as Cross River Partnership, should be combined and harnessed to safeguard London's interests.

London's reaching 50 BIDs (nearly a quarter of the UK total) does not mean the capital has reached saturation. The GLA and LEP could encourage 'BID-poor' parts of London to develop viable BIDs. Wandsworth, Lewisham, Tower Hamlets and Haringey are all considering BIDs, and all councils should assess where one could help meet local needs. Reaching the 50-BID target is testament to Mayoral and GLA support, which has accelerated the number of BIDs since 2012. This is also a good moment for the GLA and LEP to consider devoting a greater share of funding toward the health and potential of existing BIDs, notably to promote best practice and explore cross-sector and sub-regional partnerships for project delivery, cost-savings and a more coherent London BID voice.

In an increasingly competitive funding landscape, BIDs will need to work together and with local authorities to secure their status as credible, integrated partners for the long term. It will take all parties to drive the whole industry forward, but the potential for London is enormous, and the time to act is now.

APPENDIX 1: SCOPE

The scope of this research was to look at high street and town centre BIDs in London. As of October 2015 when the research was commissioned, there were 36 BIDs within the scope:

1. Angel BID
2. Baker Street Quarter Partnership
3. Better Bankside
4. Bexleyheath BID
5. Blue Bermondsey
6. Brixton BID
7. Camden Town Unlimited
8. Cheapside
9. Clapham Business Community
10. Croydon BID
11. E11 BID
12. Ealing Broadway BID
13. Hammersmith London
14. Harrow Town Centre
15. HOLBA - Piccadilly and St James
16. HOLBA - Leicester Square to Piccadilly
17. Ilford BID
18. Inmidtown
19. Kingston First
20. Love Wimbledon
21. New Addington BID
22. New West End Company
23. Northbank
24. Orpington First
25. Paddington Now
26. South Bank BID
27. Stratford Renaissance Partnership
28. Streatham BID
29. Successful Sutton
30. Team London Bridge
31. The Fitzrovia Partnership
32. Try Twickenham
33. Vauxhall One
34. Victoria BID
35. We Are Waterloo
36. West Ealing

London's seven industrial BIDs were outside the scope of this report.

1. Argall BID
2. Beddington BID
3. Garratt Business Park
4. Hainault Business Park
5. Kimpton Industrial Park
6. London Riverside BID
7. Willow Lane

Also outside the scope are the three property-owner BIDs:

1. Heart of London Business Alliance – Leicester Square and Piccadilly Circus
2. Heart of London Business Alliance – Piccadilly and St James
3. New West End Company

Four BIDs held successful ballots after the start of this research:

1. Bromley (LB Bromley)
2. Euston (LB Camden)
3. Marble Arch (City of Westminster)
4. Purley (LB Croydon)

APPENDIX 2: DATA

Name	Borough	Established	British BIDs data			TBR data - BIDs						TBR data - buffers					
			Income	Hereditaments	Firms % change	Firms CAGR	Employment % change	Employment CAGR	Turnover % change	Turnover CAGR	Turnover p/h % change	Firms % change	Employment % change	Employment CAGR	Turnover % change	Turnover CAGR	Turnover p/h % change
Angel BID	Islington	2007	£430,000	420	23.29%	2.35%	3.46%	0.38%	39.23%	3.75%	34.57%	15.4%	1.6%	-14.7%	-1.8%	-0.8%	8.7%
Baker Street Quarter Partnership	Westminster	2013	£1,050,000	175	29.01%	2.87%	3.09%	0.34%	41.36%	3.92%	37.12%	7.4%	0.8%	2.3%	22.4%	2.3%	19.6%
Better Bankside	Southwark	2005	£1,273,503	578	33.05%	3.22%	25.49%	2.55%	95.81%	7.75%	56.04%	49.2%	4.5%	-16.0%	-1.9%	73.5%	6.3%
Bexleyheath BID	Bexley	2011	£270,000	362	-0.30%	-0.03%	-19.85%	-2.43%	-30.31%	-3.93%	-13.05%	3.4%	0.4%	-9.1%	-1.1%	32.7%	46.0%
Blue Bermondsey	Southwark	2014	£102,000	290	34.72%	3.37%	-9.11%	-1.06%	54.05%	4.92%	69.50%	20.2%	2.1%	5.7%	0.6%	15.7%	9.5%
Brixton BID	Lambeth	2013	£335,000	656	22.71%	2.30%	-3.49%	-0.39%	18.62%	1.92%	22.91%	28.2%	2.8%	-31.3%	-4.1%	48.4%	116.0%
Camden Town Unlimited	Camden	2006	£670,000	307	18.11%	1.87%	15.03%	1.57%	53.88%	4.91%	33.78%	20.4%	2.1%	-1.2%	-0.1%	57.0%	5.3%
Cheapside	City of London	2015	£350,596		63.82%	5.64%	46.13%	4.30%	165.55%	11.46%	81.73%	36.9%	3.6%	26.0%	2.6%	46.3%	16.1%
Clapham Business Community	Lambeth	2014	£220,000	360	23.91%	2.41%	4.80%	0.52%	31.72%	3.11%	25.69%	30.2%	3.0%	-5.6%	0.3%	8.6%	0.9%
Croydon BID	Croydon	2007	£961,155	586	29.61%	2.92%	-7.03%	-0.81%	19.74%	2.02%	28.79%	12.8%	1.4%	13.3%	1.4%	66.9%	5.9%
E11 BID (Leytonstone)	Waltham Forest	2007	£67,000	270	13.02%	1.37%	24.50%	2.46%	80.07%	6.75%	44.63%	57.3%	5.2%	7.9%	0.8%	21.1%	2.1%
Ealing Broadway BID	Ealing	2011	£405,000	470	27.31%	2.72%	-1.09%	-0.12%	19.62%	2.01%	20.93%	13.9%	1.5%	-2.3%	-0.3%	18.0%	1.9%
Hammersmith London	Hammersmith & Fulham	2006	£729,000	365	46.33%	4.37%	19.95%	2.04%	242.88%	14.67%	185.87%	1.2%	0.1%	5.2%	0.6%	85.0%	7.1%
Harrow Town Centre	Harrow	2013	£309,950	205	65.86%	5.78%	1.58%	0.17%	51.61%	4.73%	49.25%	24.7%	2.5%	-5.6%	-0.6%	18.1%	1.9%
HOIBA - Piccadilly and Leicester Squares	Westminster	2012	£892,000	205	20.96%	2.14%	-7.78%	-0.90%	5.30%	0.58%	14.19%	17.7%	1.8%	14.5%	1.5%	-1.1%	-13.7%
HOIBA - Leicester Square	Westminster	2009	£740,000	395	13.80%	1.45%	-0.07%	-0.01%	34.86%	3.38%	10.30%	29.1%	2.9%	9.0%	1.0%	169.4%	11.6%
Ilford BID	Redbridge	2005	£328,000	179	47.00%	4.37%	15.52%	1.62%	27.42%	2.73%	7.32%	29.8%	2.9%	20.1%	2.1%	68.4%	6.0%
Imidown	Camden	2005	£2,200,000	600	29.03%	2.87%	19.09%	1.96%	27.80%	2.76%	7.32%	34.6%	3.4%	7.7%	0.8%	45.9%	4.3%
Kingston First	Kingston	2005	£882,529	950	16.62%	1.72%	-7.01%	-0.80%	18.38%	1.89%	27.30%	5.6%	0.6%	-9.0%	-1.0%	-15.0%	-1.8%
Love Wimbledon	Merton	2012	£438,576	428	25.11%	2.52%	7.91%	0.85%	84.59%	7.05%	71.05%	56.7%	5.1%	-8.3%	-1.0%	30.8%	3.0%
New Addington	Croydon	2013	£20,000	66	15.52%	1.62%	-9.94%	-1.16%	190.91%	12.60%	223.03%	7.4%	0.8%	-8.5%	-1.0%	12.7%	1.3%
New West End Company	Westminster	2005	£3,618,000	420	25.29%	2.54%	14.62%	1.53%	8.38%	0.90%	-5.45%	17.1%	1.8%	6.2%	0.7%	106.9%	8.4%
Northbank	Westminster	2013	£1,600,000	317	19.08%	1.96%	0.30%	0.03%	72.56%	6.25%	72.05%	13.6%	1.4%	10.4%	1.1%	5.2%	0.6%
Orpington BID	Bromley	2013	£210,750	350	7.02%	0.76%	-8.67%	-1.00%	-9.24%	-1.07%	-0.63%	19.7%	2.0%	-40.7%	-5.6%	-95.8%	-29.6%
Paddington Now	Westminster	2005	£536,143	358	25.16%	2.53%	67.67%	5.91%	29.18%	2.89%	-22.95%	36.7%	3.5%	30.9%	3.0%	44.7%	4.2%
South Bank BID	Lambeth	2014	£487,880	184	31.60%	3.10%	-11.65%	-1.37%	-62.02%	-10.20%	-57.01%	55.2%	5.0%	51.7%	4.7%	35.8%	3.5%
Stratford Renaissance Partnership	Newham	2015	£232,000	248	40.04%	3.81%	14.85%	1.55%	50.21%	4.62%	30.79%	32.0%	3.1%	7.5%	0.8%	59.2%	5.3%
Streatham BID	Lambeth	2013	£230,000	624	16.72%	1.73%	-35.09%	-4.69%	-4.23%	-0.48%	47.55%	26.5%	2.6%	-16.9%	-2.0%	5.8%	0.6%
Successful Sutton	Sutton	2012	£325,000	490	-1.45%	-0.16%	6.74%	0.73%	15.71%	1.63%	8.40%	48.4%	4.5%	30.4%	3.0%	85.7%	7.1%
Team London Bridge	Southwark	2005	£972,872	397	55.80%	5.05%	95.81%	7.75%	59.54%	5.33%	-18.52%	45.4%	4.3%	17.1%	1.8%	148.6%	10.7%
The Fitzrovia Partnership	Camden	2012	£925,000	227	33.42%	3.26%	5.03%	0.55%	56.40%	5.09%	48.91%	20.3%	2.1%	12.8%	1.3%	669.5%	25.4%
Try Twickenham	Richmond	2013	£260,000	450	8.48%	0.91%	-29.41%	-3.80%	21.14%	2.15%	71.62%	7.1%	0.8%	8.0%	0.9%	81.5%	6.8%
Vauxhall One	Lambeth	2012	£689,575	177	28.83%	2.85%	31.18%	3.06%	22.78%	2.31%	-6.40%	10.6%	1.1%	4.7%	0.5%	23.9%	2.4%
Victoria BID	Westminster	2010	£1,982,749	266	15.89%	1.65%	9.37%	1.00%	146.43%	10.54%	125.33%	16.2%	1.7%	-38.5%	-5.3%	135.7%	10.0%
We Are Waterloo	Lambeth/Southwark	2011	£473,607	551	38.88%	3.72%	31.03%	3.05%	76.95%	6.55%	35.05%	19.8%	2.0%	-0.2%	0.0%	41.3%	3.9%
West Ealing	Ealing	2014	£143,427	331	14.04%	1.47%	-0.49%	-0.05%	18.67%	1.92%	19.26%	25.6%	2.6%	2.0%	0.2%	31.6%	3.1%
AVERAGE			£704,481	368	26.20%	2.54%	8.69%	0.71%	48.80%	3.76%	38.74%	24.19%	2.36%	2.31%	0.08%	59.99%	3.59%
TOTAL			£25,361,312	13257												57.26%	3.48%

ENDNOTES

1. London Assembly Regeneration Committee work programme <http://bit.ly/1Fnroua>
2. These figures relate to the 36 high street and town centre BIDs within the scope of this research. See Appendix for further information. Data sources: TBR, British BIDs and survey responses.
3. The Local Government Act 2003, <http://bit.ly/1Fnroua>
4. Ian Cook, Policing, Partnerships, and Profits, Urban Geography <http://bit.ly/20VNuDA>
5. At end of February 2016 and this report's publication, there were 48 BIDs in London, 36 fall within the scope of this research; seven of the 48 are Industrial BIDs and five were established after the research was commissioned in October 2015 (Bromley, Euston, Marble Arch, Purley and NWECA property BID). A separate piece of research has been commissioned by the GLA to explore the impact and potential of Industrial BIDs in London.
6. The 2014 data was sourced from Trends Business Research Ltd (TBR). The 2012 data, also sourced by TBR, is taken from the 2012 GLA-commissioned report on BIDs.
7. Additional income data is from the 2015 British BIDs' survey data for 31 of the 36 BIDs covered here. British BIDs define additional income as "the amount in cash £s received into your BID bank account ... over and above the BID levy". Data for the other five BIDs (Bexleyheath BID, Orpington First, New Addington, Brixton BID and Cheapside BID) was from our survey. 2012 data is from the 2012 GLA-commissioned report on BIDs.
8. Local Government Association, Future Funding Outlook for Councils from 2010-11 to 2019-20, <http://bit.ly/1RFPgSW>
9. Institute for Fiscal Studies, Sharpest cuts to local government spending in poorer areas; same areas likely to lose most in next few years, <http://bit.ly/1TiLdMH>
10. This figure was gathered from the 2012 report on BIDs in London commissioned by the GLA. There were 21 respondents to this question in their survey.
11. This figure was gathered from our 2015 survey. 11 out of the 28 BIDs who responded to this question said that they deliver services on behalf of the council.
12. 'Additionality' refers to the idea that BIDs should provide services that are additional to those provided by the local authority and not replace existing public sector services.
13. 22 BIDs responded to this question in our 2015 survey.
14. Against Business Improvement Districts <http://bit.ly/1Wn8sof>
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16. HM Treasury, Chancellor unveils devolution revolution, <http://bit.ly/1PW0sIR>
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18. The Guardian, Local councils warn of critical funding crisis as £18bn grant is stopped, <http://bit.ly/1oDC4mL>
19. Pricewaterhouse Coopers, Local State We're In, <http://pwc.to/214vbca>
20. Regeneris, Business Rates: Who pays and why it matters? <http://bit.ly/1Wn8MU3>; Greg Clark MP, Oral statement to Parliament, <http://bit.ly/1R6OVZv>
21. <http://bit.ly/1oDC4mL>
22. HM Treasury, Business Rates Review: terms of reference and discussion paper, <http://bit.ly/1Cprun0>
23. ATCM, Manifesto for London's Town Centres, <http://bit.ly/1RQhV8o>
24. Outlaw, Business rates structural review will be 'fiscally neutral', says UK Treasury, <http://bit.ly/1wZfkR1>
25. BNP Paribas, London businesses set to be biggest losers in 2017 business rates revaluation, <http://bit.ly/1ObG9Dr>
26. GLA, Crossrail Funding Prospectus, <http://bit.ly/1ogrOQU>
27. London First, Funding Crossrail 2, <http://bit.ly/1kquY0X>
28. Department for Business, Innovation and Skills, Apprenticeship levy: employer owned apprenticeships training <http://bit.ly/20VOibF>
29. Kevin Ward and Ian Cook, Business Improvement Districts in the UK: Territorialising a 'global' model? <http://bit.ly/1SB2HVL>
30. Green Party, <http://bit.ly/1Tl4Gwj>
31. London Assembly Regeneration Committee, <http://bit.ly/1XzxVw6>
32. RIBA, <http://bit.ly/1QGgqEy>
33. Baker Street Quarter Partnership, <http://bit.ly/1Tsau8v>
34. Bermondsey Community Kitchen, <http://bit.ly/1TlceR1>
35. Angel London, <http://bit.ly/1KkOF8h>
36. Employ SE1, <http://bit.ly/1XsZ6Zg>

37. Better Bankside, <http://bit.ly/1XsZ7wl>
38. BBC, Budget to propose longer Sunday trading hours, <http://bbc.in/1KkOlko>
39. Data from TBR.
40. Victoria BID, <http://bit.ly/1SB4jPA>
41. Cross River Partnership, <http://bit.ly/20VOvLV>
42. According to the Association of Public Service Excellence, 'enabling' implies "a minimal or residual role for local government, primarily a role which is founded in procurement and contract management." APSE, The ensuring council: An alternative vision for the future of local government, <http://bit.ly/1otapVR>
43. Collaboration between London Business Improvement Districts (internal document produced by the BIDs for the GLA-convened BIDs group)
44. West End Partnership, <http://bit.ly/20W6EcG>
45. Simon Pitkeathley, The new kids on the municipal block, Public Finance, <http://bit.ly/1KRso8x>
46. South Bank Partnership Manifesto, <http://bit.ly/1VgyVnm>
47. SBEG is a not for profit service-delivery organisation; South Bank Partnership is a high-level strategic network that meets quarterly.
48. South Bank London, <http://bit.ly/1oDCTfd>
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57. British BIDs, <http://bit.ly/1U9Vnjy>
58. This data was sourced from the British BIDs 2015 survey data. Thirty-one London BIDs responded to this question in the survey.
59. This data was sourced from the British BIDs 2015 survey data and so represents the 31 BIDs who responded to the survey.
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61. The drop in the local authority representation is likely to be accounted for by the change in policy of Westminster council – see Section 9.6
62. There are 489 businesses on BID boards. This figure is from British BIDs data and our survey, and represents all 36 BIDs.
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72. GLA, Regeneration guides, <http://bit.ly/1QGwK8G>
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74. GLA, London named Europe's top city for volunteering, <http://bit.ly/1KTtr1o>
75. Orpington First, <http://bit.ly/1KRtlxp>

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NOTES



Rocket Science UK Ltd.

70 Cowcross Street
London,
EC1M 6EJ


 rocketsciencelab.co.uk

 @_RocketScience_


 Rocket Science UK Ltd

Future of London

70 Cowcross Street
London
EC1M 6EJ

futureoflondon.org.uk 

@futureofldn 

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