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London Boroughs Report 2018

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London Boroughs Report 2018

This NLA Report is published by New London Architecture (NLA) in November 2018. This inaugural annual London Borough Report is a resource for Londoners, professionals and international visitors to understand local development across London, alongside a permanent exhibition at NLA's Central London galleries. The Report forms part of the year-round NLA London Boroughs Programme, giving local authorities a platform for discussing shared issues and best practice.

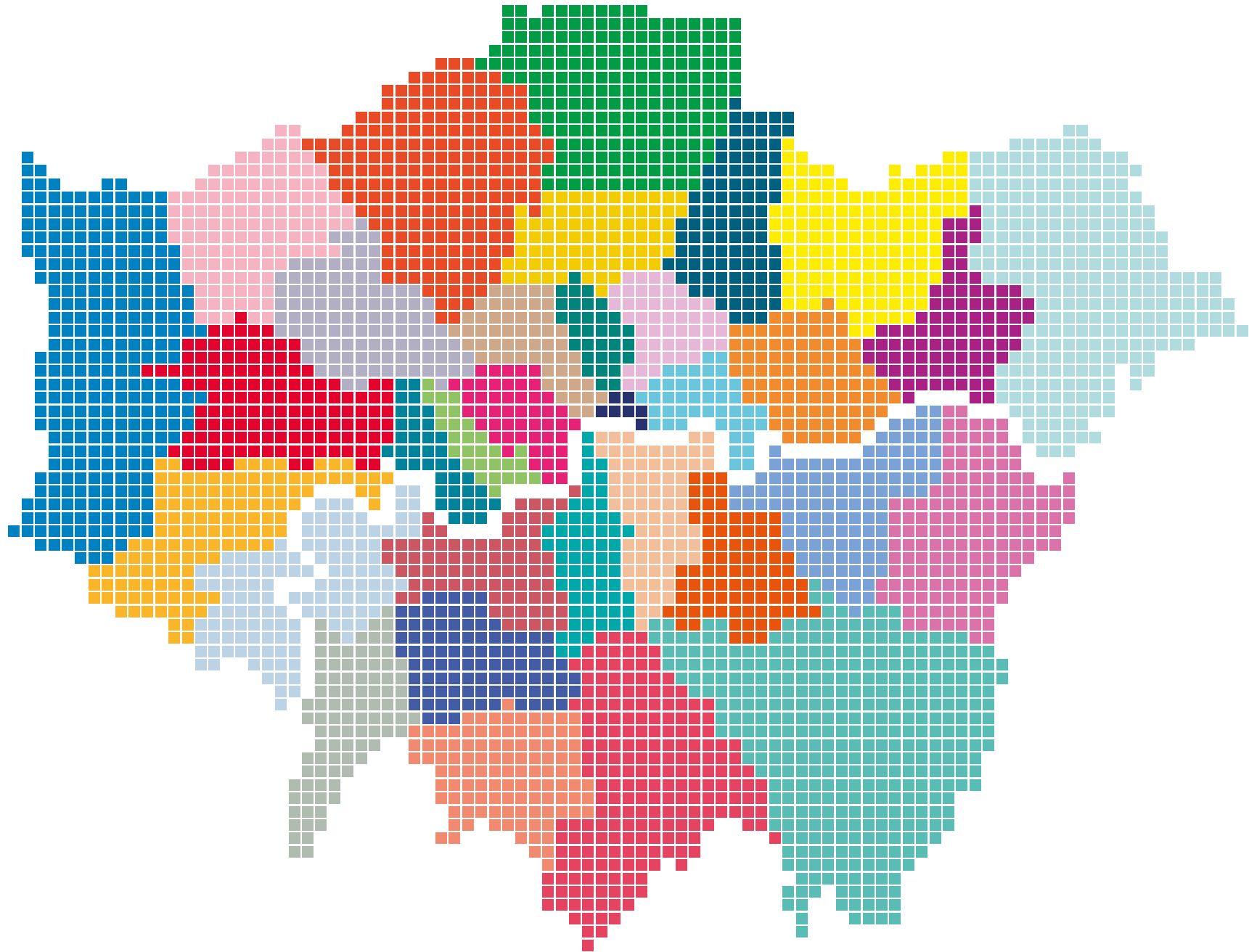
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London’s local authorities

- Barking & Dagenham
- Barnet
- Bexley
- Brent
- Bromley
- Camden
- City of London
- City of Westminster
- Croydon
- Ealing
- Enfield
- Greenwich
- Hackney
- Hammersmith & Fulham
- Haringey
- Harrow
- Havering
- Hillingdon
- Hounslow
- Kensington & Chelsea
- Kingston upon Thames
- Lambeth
- Lewisham
- Islington
- Merton
- Newham
- Redbridge
- Richmond upon Thames
- Southwark
- Sutton
- Tower Hamlets
- Waltham Forest
- Wandsworth



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Foreword



Peter Murray
Chairman
New London Architecture

November 2018

London’s boroughs are on the front line in ensuring that the capital’s citizens can enjoy full and rewarding lives. They reflect the variety and diversity of our great city – some, like Westminster and Kensington and Chelsea, include areas of great wealth as well as areas of deprivation. Others, like Barking and Dagenham, are still recovering from London’s industrial decline but whose lower land values now provide new opportunities for those pushed out of more central areas because of the high cost of housing and workspace.

The delivery of new housing is a key role for the boroughs and one that will be helped by the lifting of the borrowing cap in the Autumn Statement, while the growth of housing delivery vehicles within local authorities is an encouraging sign that public housing is once again being delivered by an energised public sector. Local infrastructure and the delivery of the Mayor’s excellent strategy for healthy streets also falls within the boroughs’ remit and is an area where greater application and more funding is needed. The completion of cycling quietways is slow and tortuous while key schemes for better conditions for pedestrians have been delayed.

This new publication and the related permanent exhibition at New London Architecture, The Building Centre, brings together the strategies of London’s local authorities into a single document so that Local Plans can be seen in a broader context and in relation to the new London Plan. London is a complex metropolis. The 33 very different local authorities not only provide the governance in their local neighbourhood, they also contribute to the variety that characterises the city. It is a misnomer to call London a city of villages – it is a city of towns and local centres that generate its polycentric plan and the communities that live in them.

London’s
Boroughs
2018: Year
Review

The wider picture

As central government finance for local services continues to be reduced, London’s boroughs have to find new ways to manage and deliver services while also dealing with intense pressures on land, housing targets and often severely curtailed resources. Undoubtedly one of the greatest challenges that local authorities across London have been tackling – and almost certainly will continue to face in the coming years, despite recent government announcements – is the prolonged period of public funding austerity, combined with higher costs of – and increasing demand for – the statutory services that they must provide for their residents.

In September 2017, London Councils – the organisation that represents London’s 32 boroughs and the City of London Corporation – reported that as London’s population is expected to boom to 9.1 million by 2020, having grown at ten times the rate of the rest of England, London boroughs will have experienced a nearly two-thirds reduction in funding from central government since 2010. This, it argues, will lead to ‘a cumulative £1.5 billion funding black hole in borough finances by the end of the decade’,¹ even though this year saw three-quarters of local authorities across England, including in London, made the decision to raise general council tax for local households by the maximum rate allowed without the need for a local referendum.²

Against this background of some of the toughest financial conditions, tragic events have also brought into sharp focus the role and responsibility of national and local authorities in ensuring the safety and security of London’s citizens, both at home and in public spaces. The Grenfell Tower fire of June 2017 led to the loss of 72 lives in one of the worst civil disasters in modern Britain. One of the major causes of the fire has been attributed to new exterior cladding added during renovation in 2016, and this led to a major independent review of fire safety measures and building regulations. In the aftermath there was also widespread criticism of the council’s response to the fire, and also the management of the tower and lack of attention paid to safety concerns consistently raised over a long period

by residents. While the public inquiry is ongoing at the time of writing, the tragedy has compelled local authorities in particular to rethink and reassess not only the ways in which public housing estates are managed and maintained, but also the way in which they engage and involve residents in processes of change.

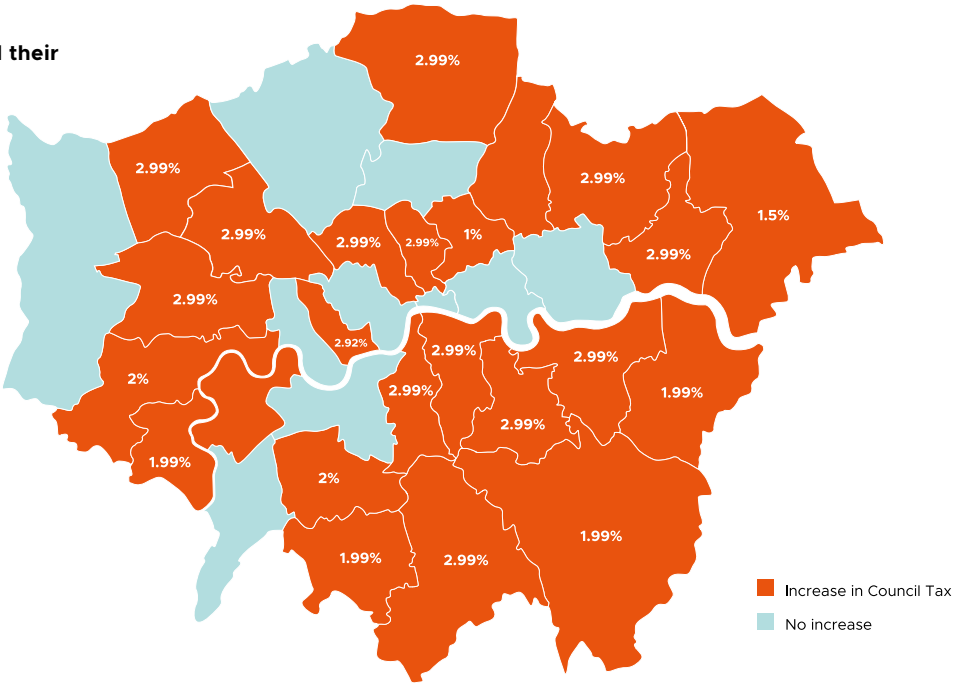
Grenfell occurred during the same period as three terrorist attacks on Westminster and London Bridges and in Finsbury Park in March and June 2017. The use of vehicles as weapons by the assailants led to the implementation of safety barriers and other ‘hostile vehicle mitigation measures’ not only on bridges but in and around other public spaces and venues.³ At the same time, concerns about safety in public spaces were heightened by a reported increase in incidents of violence, especially knife crime among young people (up by 21 per cent in 2017–18 according to the Metropolitan Police⁴), and crimes committed using mopeds.

Wellbeing and health is another key major concern for London, especially as the city’s air quality has continued to be one of the world’s worst. The capital reached its legal limit (set by the European Union) for the whole of 2018 less than one month into the year, despite the Mayor having introduced a ‘Toxicity Charge’ (T-Charge) for older, more polluting cars in central London, and low emission bus zones. Central government’s announcement in June 2018 of a third runway for Heathrow airport offers positive news for business growth but has also raised serious concerns about the anticipated negative impact on air quality, noise and congestion; in July 2018 the Mayor, along with environmental campaign group Greenpeace and four London boroughs – Wandsworth, Hammersmith & Fulham, Richmond and Hillingdon (plus Windsor and Maidenhead) – sought a judicial review of the Government’s decision ; the case, along with other legal challenges, will proceed to a full hearing in March 2019.⁵ Expectations of growth in London’s town centres, especially among the business community and local authorities – and not least hopes for easier and quicker travel across London – were severely deflated by the announcement in August 2018 of a nine-month delay in the completion

and opening of the central section of the Elizabeth line until autumn 2019. Although plans to completely pedestrianise Oxford Street were scrapped, in October Westminster City Council announced £150 million of investment over the next three years in improvements to the area, including more spaces for pedestrians and introduction of 20 mph speed limits, but with two-way traffic retained along the length of the street.

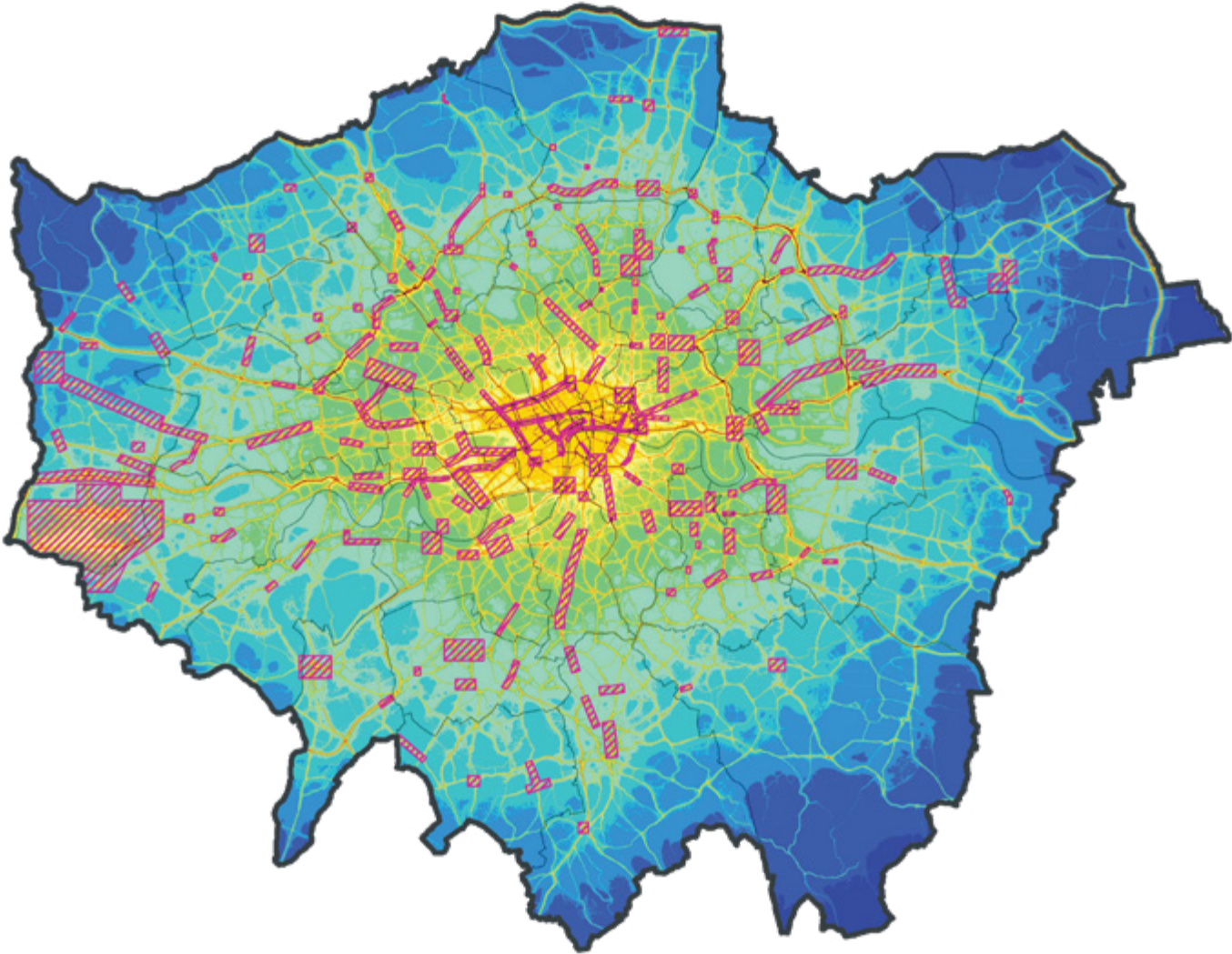
Against this backdrop, London’s local elections of May 2018 offered ‘no major political earthquake to speak of’.⁶ There was relatively little change, and even stasis, in the political make up of London, with the major parties retaining and consolidating their support in traditional strongholds. The Conservative Party now holds seven councils and fought off an expected Labour challenge in Barnet, City of Westminster, Kensington & Chelsea and Wandsworth but has continued to lose council seats across much of the capital. Labour controls 21 councils – virtually the same as before the elections – but increased its total number of councillors with its second-best London local election result since 1971. The Liberal Democrats retained Sutton and won back Richmond and Kingston but made only a limited increase (33) in their total number of seats across the capital since 2014.⁷

Local Authorities who increased their main Council Tax 2018-2019



Opposite page:
Top: Oxford Street District Place Strategy and Delivery Plan © Publica 2018, all rights reserved
Bottom: Safety barrier installation on London Bridge © Agnese Sanvito

Air Quality and Air Quality Focus Areas
 © GLA⁸



NO2 (µg/m3) LAEI 2013 Update

< 16	37 – 40
16 – 19	40 – 43
19 – 22	43 – 55
22 – 25	55 – 58
25 – 28	58 – 73
28 – 31	73 – 76
31 – 34	76 – 97
34 – 37	Air Quality Focus Areas

Political control of London’s boroughs, July 2018
 © London Communications Agency and London Councils⁹



Labour
Conservative
Liberal Democrats
City of London Corporation
No overall control

National and regional policies and strategies

The past year was an especially significant one for the future shape of London with the publication of two key strategic documents for planning and the built environment: the revised National Planning Policy Framework (NPPF), published by the UK Government in July 2018, and the new Draft London Plan, published by the Mayor of London in December 2017. The former sets out the national planning policies for England and how these are expected to be applied, while the latter is the strategic plan for the capital, outlining the economic, environmental, transport and social framework for development. Both provide the strategic overview and direction within which local authorities and communities develop their own local and neighbourhood plans, which reflect priorities of specific places.

A key driver underpinning the policies outlined in the NPPF is the need to exponentially increase housebuilding to the stated nationwide target of 300,000 new homes a year by the mid-2020s, and to ensure that this focuses on affordable, high-quality homes. Among the important changes announced are a new standardised methodology for councils to calculate local housing need, informed by factors including the affordability of existing homes for people on lower and medium incomes; an emphasis on more intensive and effective use of existing land and buildings and greater use of small sites; and a stronger focus on high-quality design. At the Conservative Party conference in October 2018, the Prime Minister announced the lifting of the Housing Revenue Account (HRA) borrowing cap for local authorities, removing the limit to how much they can borrow against their housing revenue account, with the aim of encouraging councils to bring forward and deliver more rapidly on building new homes.

The overarching principle of the new Draft London Plan is one of ‘Good Growth’. Future planning, infrastructure and development must be underpinned by the Plan’s stated aim ‘to improve the health and quality of life of all Londoners, to reduce inequalities and to make the city a better place to live, work and visit’. Key elements of the Plan include a new target of 65,000 homes a year, of which an overall 50 per cent should be

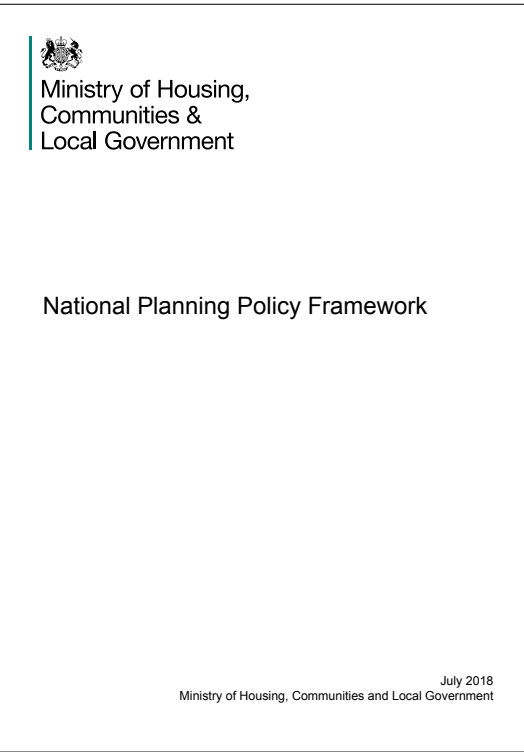
affordable; an enhanced focus on walking, cycling and public transport as a means of creating healthier and more socially and economically sustainable places; intensification and densification, especially around transport hubs; greater use of small sites; a commitment to preserving the Green Belt; and retention and consolidation of industrial uses. To create an accessible, inclusive and sustainable city within the capital’s existing boundaries, the vision for London’s growth is as a compact, mixed-use and multi-centred city.

With a population expected to increase by 70,000 a year to reach 10.8 million in 2041, this means making more efficient use of land and building to greater densities in places with good public transport access, as a means of unlocking growth especially in outer London. Expanding on key areas and the vision laid out in the Plan, the Mayor also published specific strategies for transport, the environment, housing and culture. Another key feature of mayoral policy is the commitment to high-quality design for buildings and neighbourhoods, with, among other measures, the appointment of the Mayor’s Design Advocates. This group of 50 leading built environment professionals from a range of disciplines provide independent support, critique and advice on all aspects of London’s built environment.

The vision, direction and ambitions of the Draft London Plan have broadly received a welcoming, though measured, response from professionals and public alike. Representing views of London’s boroughs, London Councils offered support for the commitment to ensuring housing growth and supporting physical and social infrastructure, but it expressed concerns about ‘adequate mechanisms’ to deliver this – especially the pressures on planning departments and lack of skills and resources in the light of the Mayor’s call for design reviews and design codes, for example. It also called for boroughs to have greater flexibility in setting local policy on employment.¹⁰ Concerns about resourcing were shared by the London Assembly Planning Committee, which also welcomed the Mayor’s decision to continue to accommodate London’s growth within its boundaries and recognised that

density of development must be higher – but this must be the best quality of design, with the support of local communities. While more homes are needed, said the Committee, they must be the right size and type for the capital’s housing need.¹¹

At the Big Debate, organised by New London Architecture (NLA) in February 2018, over 1,000 people were polled on their responses to the Plan: the vast majority (86 per cent) agreed that densifying the suburbs was necessary to deliver more homes and jobs, and that the Mayor working with wider partners across the South-East on strategic infrastructure and housing targets would prove effective in providing affordable homes for Londoners (72 per cent). But an overwhelming majority (96 per cent) felt London would fall short in delivering 65,000 new homes a year.¹²



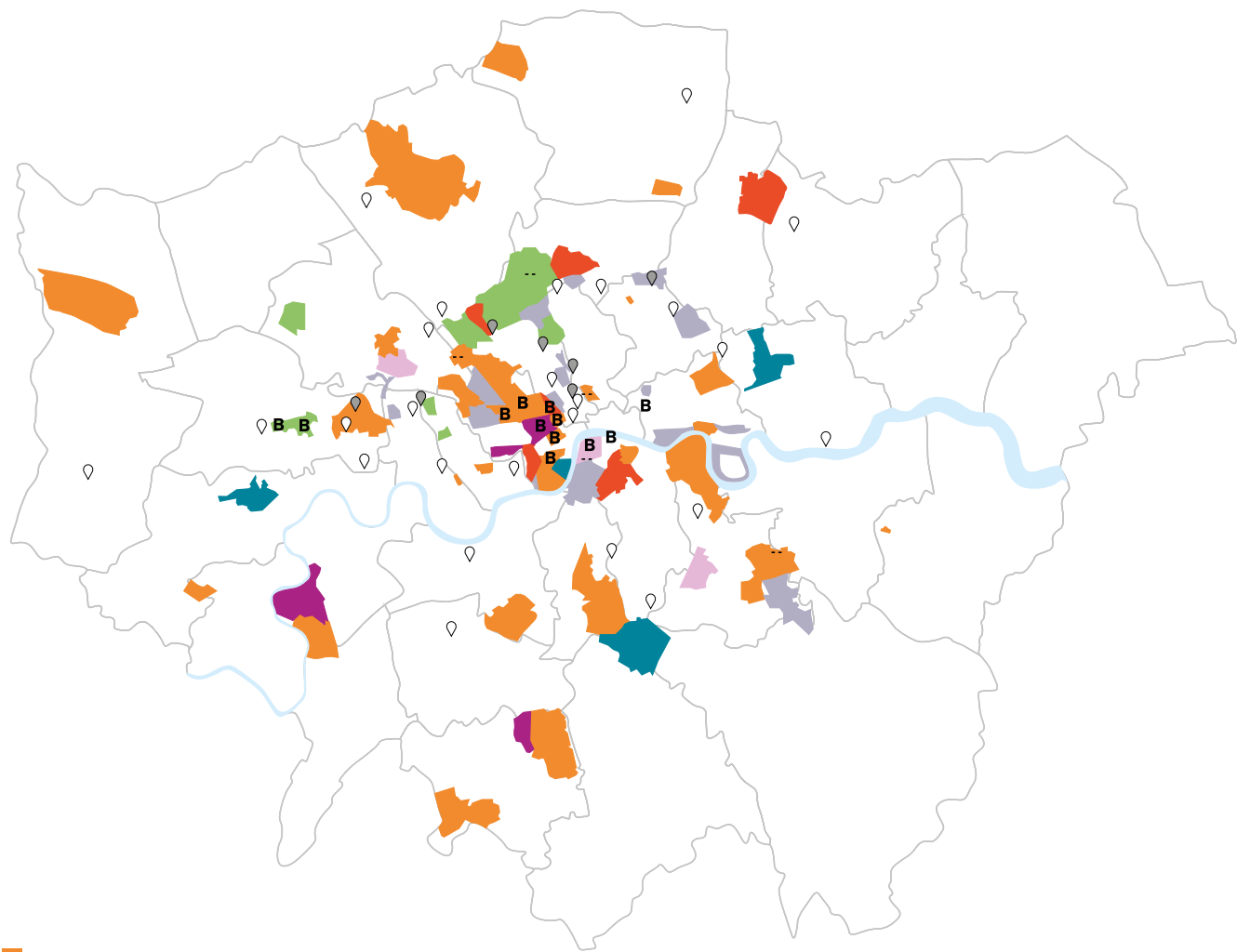
Opposite page:
Top Left: Cover of the Ministry of Housing, Communities and Local Government’s National Planning Policy Framework, July 2018
Top Right: Cover of Mayor Sadiq Khan’s draft new London Plan, December 2017
Bottom: The Mayor’s 50 Design Advocates who advise Sadiq Khan on good growth strategies

London's Localities (after Abercrombie and co.)
 A map highlighting the inter-related system of communities across London, providing an evidence base for better-informed place-shaping and regeneration strategies.
 © Adam Towle, GLA, 2018



- Central Activities Zone
- High Street
- Well connected locality
- Less well connected locality
- Airport/aerodrome
- Public park or greenspace
- Industry
- Significant cultural location

London's Neighbourhood Forums, 2018
 A map showing the location of the 100+ communities now involved in creating plans for their neighbourhoods.
 © neighbourhoodplanning.london



- Developing vision and objectives
- Plan made
- Not yet designated
- Applied for designation
- Submitted to Local Planning Authority
- Examination
- Early interest
- Not active
- Business Area
- Cross Boundary

Some common issues and trends for London’s boroughs

Tackling skills shortages within boroughs

As the organisations with oversight of local economies, planning strategies and services, London’s boroughs all have a fundamentally important and strategic function in ensuring that local places support the social, economic and cultural life of the capital’s citizens. Increasingly, they have to find new ways to accommodate growing numbers of people and jobs. Creating and maintaining high-quality and sustainable places – delivering the Mayor’s vision – requires well-resourced planning departments, as well as the skills of practitioners in urban design, architecture, engineering and conservation. Yet the majority of London local authorities report a significant gap in resourcing. In November 2017, a survey of London boroughs indicated that 96 per cent

needed more planning and place-shaping skills, while all said they have difficulty attracting appropriately qualified or skilled practitioners; 91 per cent of boroughs are compelled to use expensive agency staff or external consultants to fill gaps.¹³ Councils are also seeking more developmental staff as well as design and planning specialists.

Alongside calls for additional funding from central government, a new initiative launched in November 2017 seeks to expand regeneration, urban design and planning capacity in London’s boroughs. Public Practice is a social enterprise – founded with the support of the GLA and others – which places architects, urban designers and planners, often on secondment from the

private sector, on fixed-term contracts in participating local authorities. The first cohort of 17 associates were named in May 2018 and included architects who have worked at leading practices including Herzog & de Meuron, Stanton Williams and Maccreeanor Lavington. A call for expressions of interest from councils and professionals for a second group of placements was announced in autumn 2018.¹⁴

Housing

The housing crisis – lack of supply and affordability – remains at the top of the agenda of key issues that London’s local authorities must tackle. Fewer than half of the targeted 65,000 new homes each year are being delivered. In addition, fewer than 7,000 affordable homes were built across London in 2017, with more than a third of boroughs offering under 100 of such homes, at a time when London house prices and costs of renting have become prohibitively expensive for many.¹⁵ This is an issue that affects all of London’s boroughs: areas in outer London have become sought after by prospective buyers and renters, priced out of the housing market nearer the centre. For local authorities, who are obligated by law to provide places to live for households deemed to be unintentionally homeless and in priority need, there is increasing pressure on costs of temporary accommodation, which either has to be purchased directly or arranged via the private market.

With the aim of kickstarting council housebuilding, in October 2018 the Mayor confirmed that £1 billion would

be allocated to 26 London boroughs to help fund the construction of more than 14,000 new homes (of which over 11,000 will be offered at social rent levels), through the ‘Building Council Homes for Londoners’ programme. The biggest allocations were secured by Newham and Ealing. Over the past year especially, London boroughs have also been exploring new and often entrepreneurial ways to accelerate delivery of new homes, and particularly affordable and social rented ones, as private-sector development is not currently providing what is needed in many areas. London boroughs are embarking on joint ventures with the private sector, and more than half have established local housing development companies for the creation of high-quality and affordable homes on publicly owned land.¹⁶ Prominent among these are Croydon’s Brick by Brick – which in 2018 had plans for about 2,000 new homes on multiple sites throughout the borough – and Barking and Dagenham’s Be First, which aims to provide 50,000 new homes within the next 20 years. Such schemes aim to benefit wider placemaking objectives by reinvesting

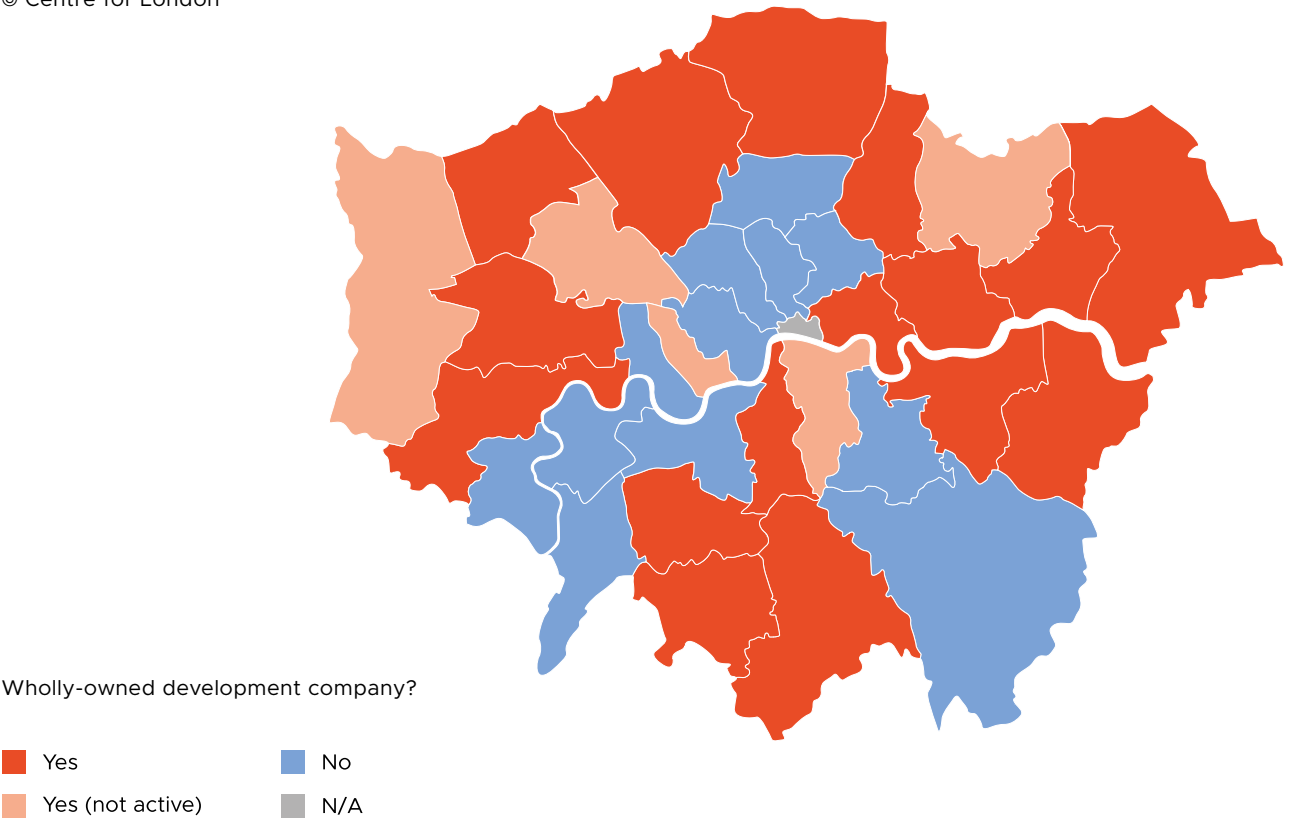
returns from development back into services required by local residents.

Greater cross-borough collaboration and the adoption of potential of modern methods of construction such as modular, to deliver housing faster and easier to places where it is most needed, are also apparent. In 2018, for example, taking a lead from the emergence of council-led development companies, the 16 boroughs that form part of the London Councils Temporary Accommodation Supply Group set up a not-for-profit company, PLACE Ltd, to procure and install factory-built homes on ‘meanwhile’ sites, as a better-quality and adaptable alternative to B&Bs and other temporary accommodation for homeless families.



Local Authorities who have created wholly-owned development companies, July 2018

© Centre for London¹⁷



‘Urbanising the suburbs’: growth in outer London

The Mayor’s ambitions in the Draft London Plan to create a denser, compact yet well-designed, accessible and sustainable city for all has refocused attention on outer London. The advent of the east–west Elizabeth line and the upgrades to other public transport infrastructure in the pipeline, especially the Bakerloo line extension and Crossrail 2, will transform connectivity in many outer areas (although integrated orbital travel is still a challenge). This increased accessibility, along with limitations on land use and high costs of residential and commercial space in the centre, have made outer London’s town centres and areas around transport hubs a key focus of new development activity, as demonstrated in NLA’s 2017 insight study London’s Towns: Shaping

Engaging and involving communities

The tragedy of Grenfell has brought to heightened attention the ongoing debates and concerns about how to engage local communities effectively during processes of change and regeneration. This is of particular importance in relation to the upgrading and development of estates built for social housing. Controversy over proposals to demolish homes as part of estate regeneration schemes has become a key issue across London boroughs, especially since a 2015 report by the London Assembly reported a net loss of some 8,000 social rented homes in 50 estates that have undergone regeneration in the past decade.¹⁹ In response, in July 2018, the Mayor announced a new requirement that any landlord seeking GLA funding for strategic estate regeneration projects involving the demolition of social housing must demonstrate that they have secured resident support for proposals through a ballot. So far, Enfield and Kingston councils were among the first to announce the introduction of ballots.²⁰

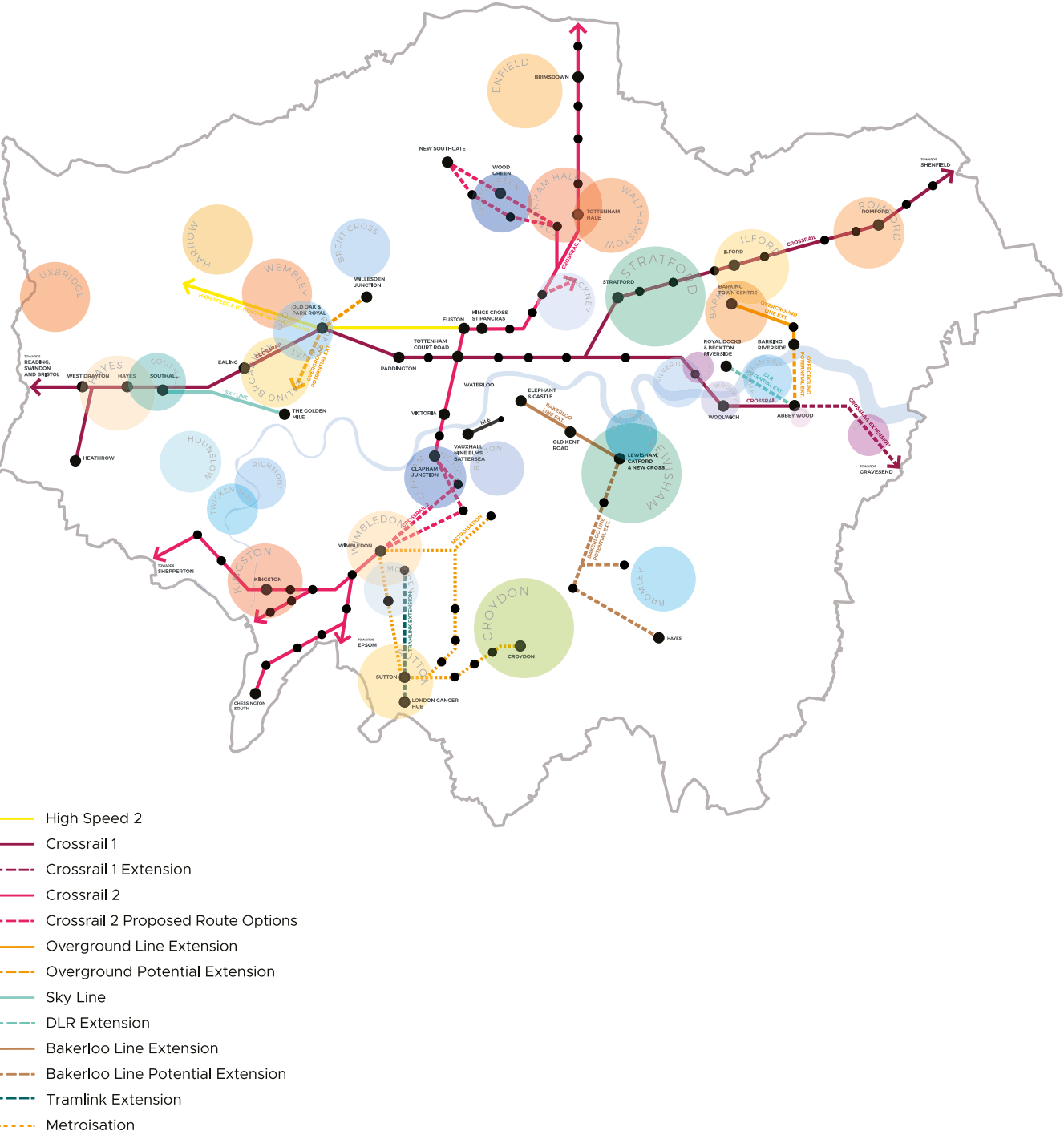
the Polycentric City. In particular, the long-term development programme of Transport for London, as one of London’s largest landowners, provides opportunities to use space around stations more efficiently to deliver more homes and jobs in well-connected locations. In 2016/17 TfL brought sites to market that will deliver nearly 1,000 homes, half of which will be affordable.¹⁸

Boroughs from Lewisham to Waltham Forest and Redbridge to Ealing have been taking a much more proactive placemaking (and development) leadership role in seeking to deliver ‘appropriate growth’ for their local communities, via highly coordinated strategic approaches with private sector partners, local businesses and community groups. However,

Further means of involving communities in decision-making around changes to local neighbourhoods are also being explored, with the creation, for example, of small grant schemes to support local people in community-led projects: among those announced in 2018 was Culture Seeds, a GLA-funded scheme to support more grassroots arts, heritage and culture activities across London.²¹ The role of digital technology in empowering local decision-making has also started to come to the fore and is likely to develop further in the coming years, with councils such as Lewisham using online interactive tools to gather local residents’ suggestions for improving walking, cycling and public transport routes, for example, to help inform new transport strategies.

as NLA’s research has shown, there are still strong concerns in several boroughs that the emphasis on housing numbers and connectivity with the centre might still mean that outer London areas – some of which retain strong affiliations to neighbouring counties such as Kent and Surrey, rather than to London – act as dormitories without increased benefits to local residents or businesses.

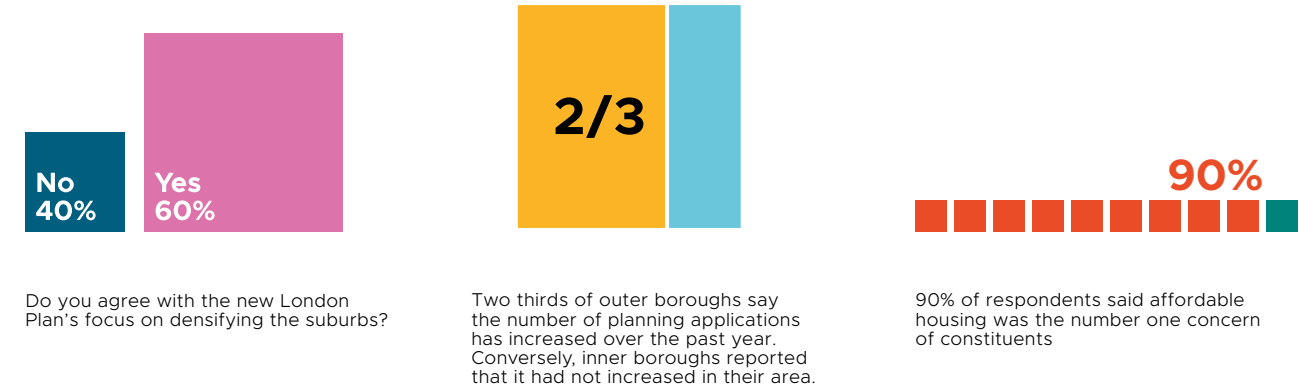
Future rail improvements and areas of growth²²



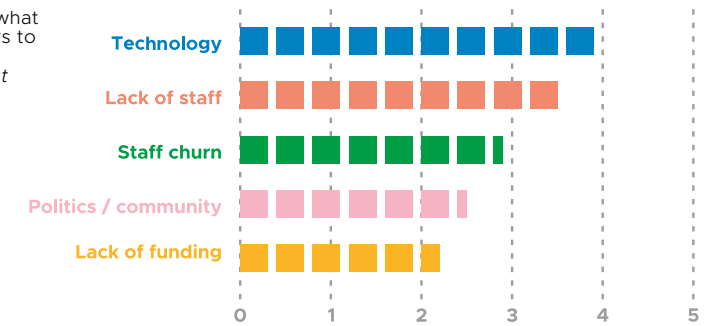
London in numbers

Borough survey

NLA surveyed²³ London boroughs for their thoughts on a set of key issues – here are some of the findings:

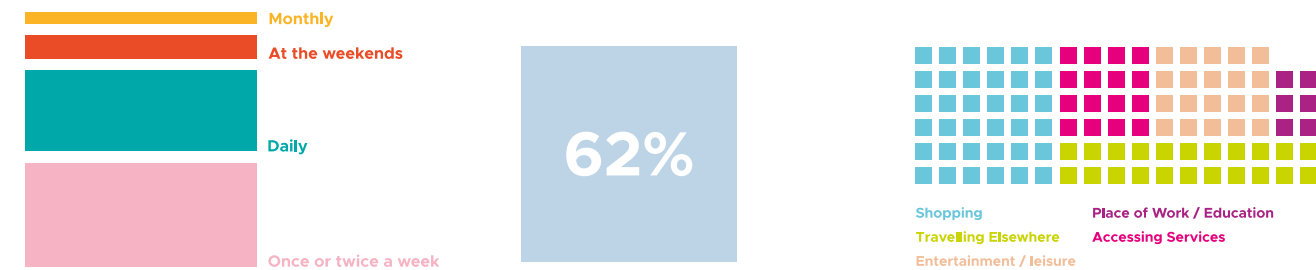


We asked the London boroughs what they believe to be the key barriers to delivering growth in their locality: *(rated 1-5 with 5 being the biggest barrier)*



Town Centre survey

As part of 2017's *London's Towns: shaping the polycentric city* research, NLA surveyed²⁴ Londoners for their thoughts on their town centres – here are some of the findings:

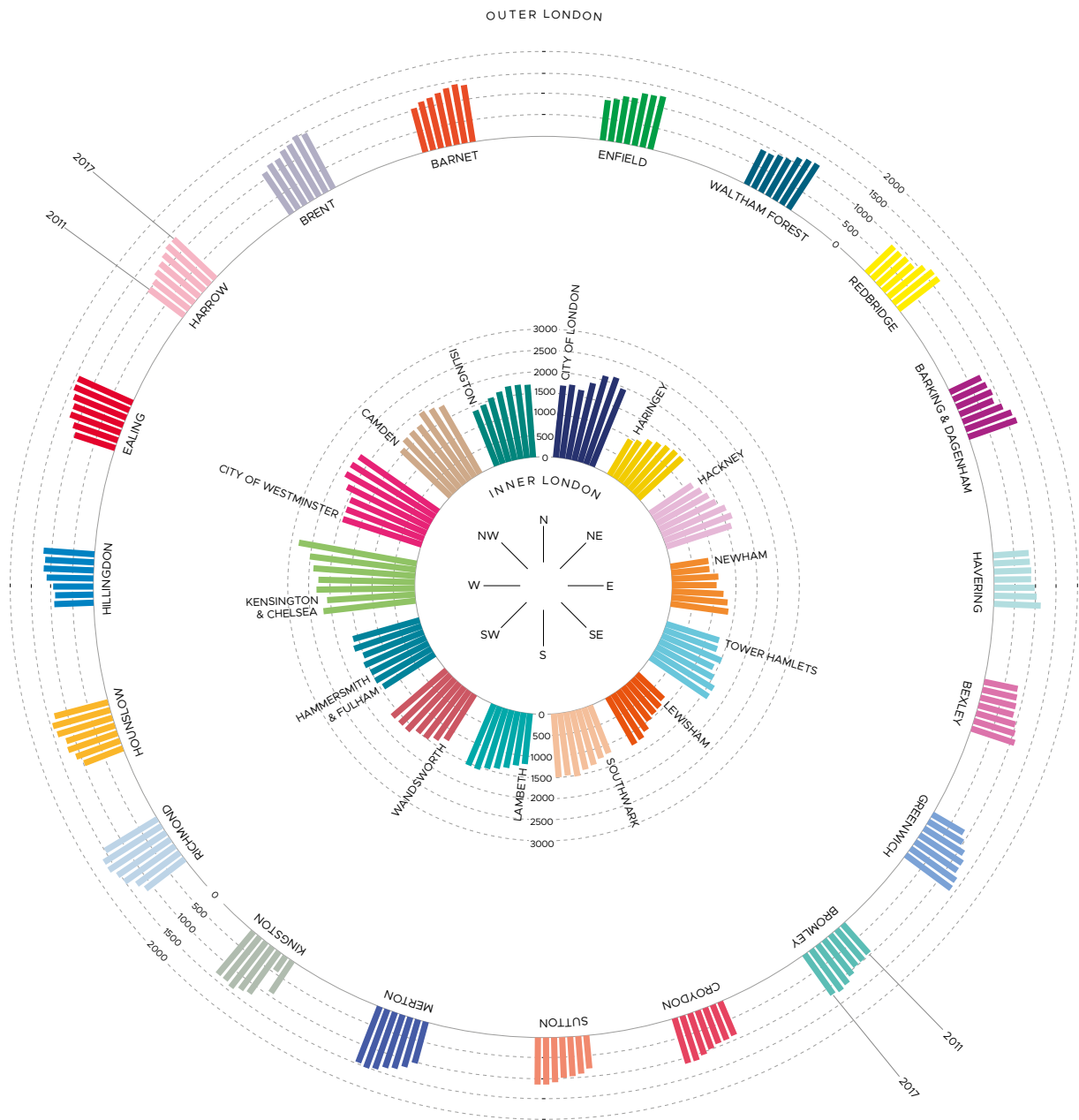


How often do you visit your local town centre?

62% of Londoners want better public spaces in their town centre

What do you primarily use your town centre for?

Average monthly rent cost in London’s private rental market
2011 – 2017 (in £)²⁵

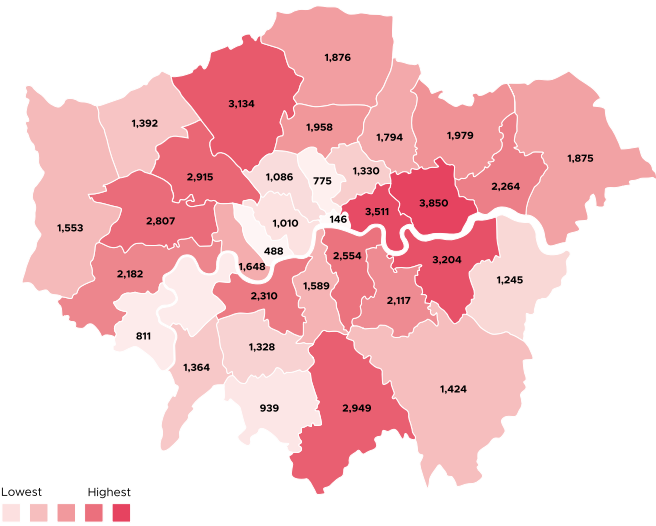


Average London house price 2011 – 2017 (in £)²⁶

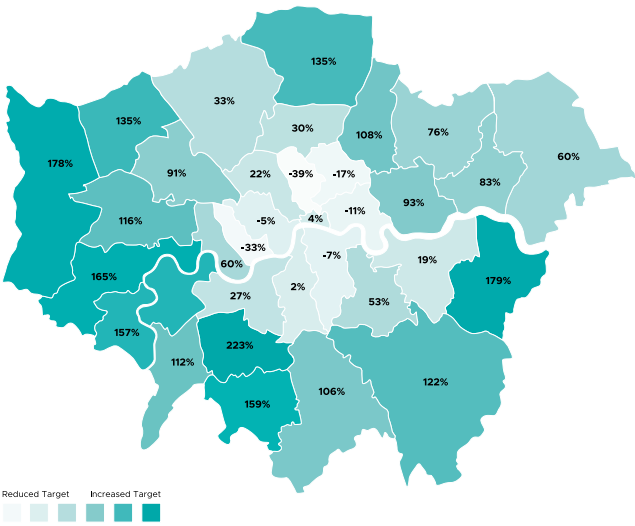


London’s housing targets as specified by the new draft London Plan²⁷

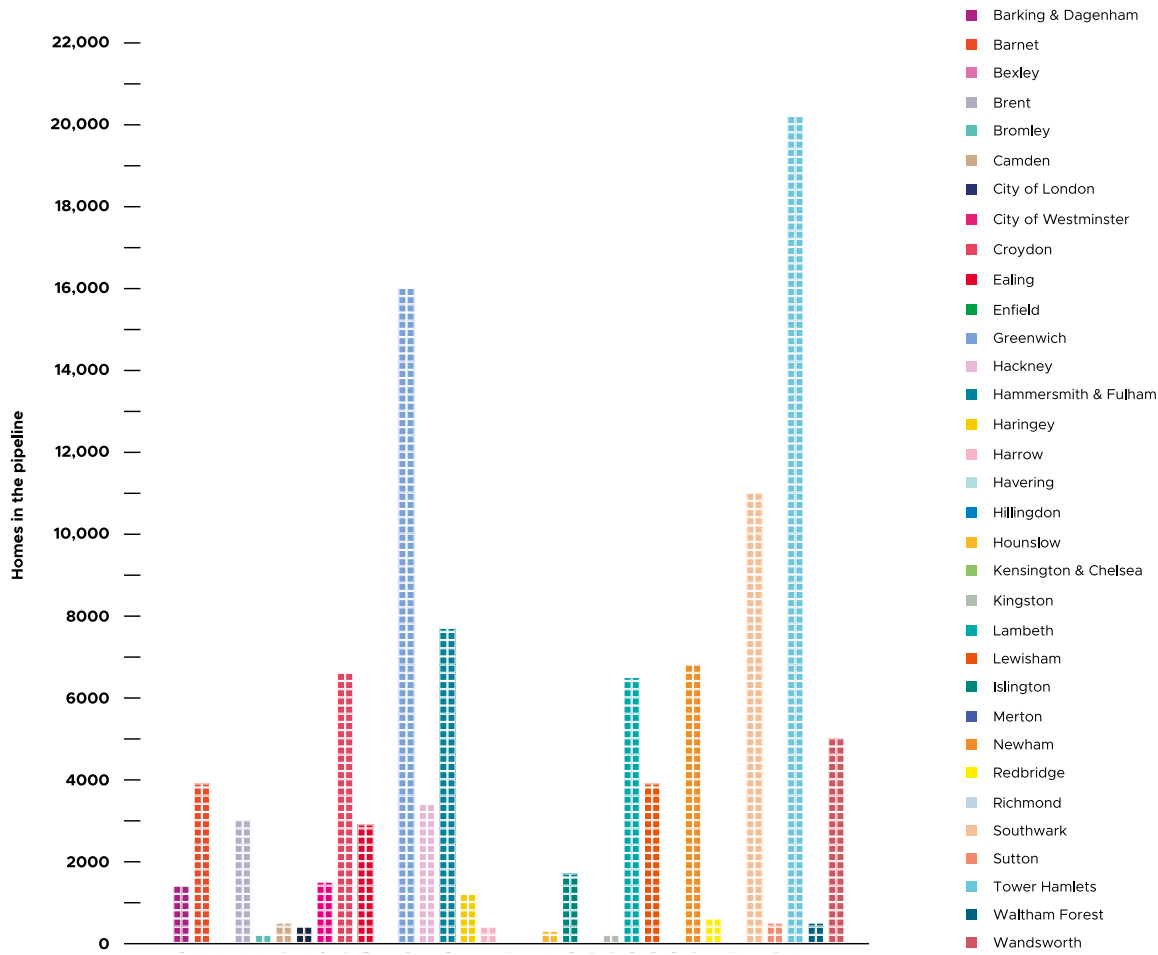
Number of new homes targeted per annum



Percentage change of housing targets from 2013 – 2018

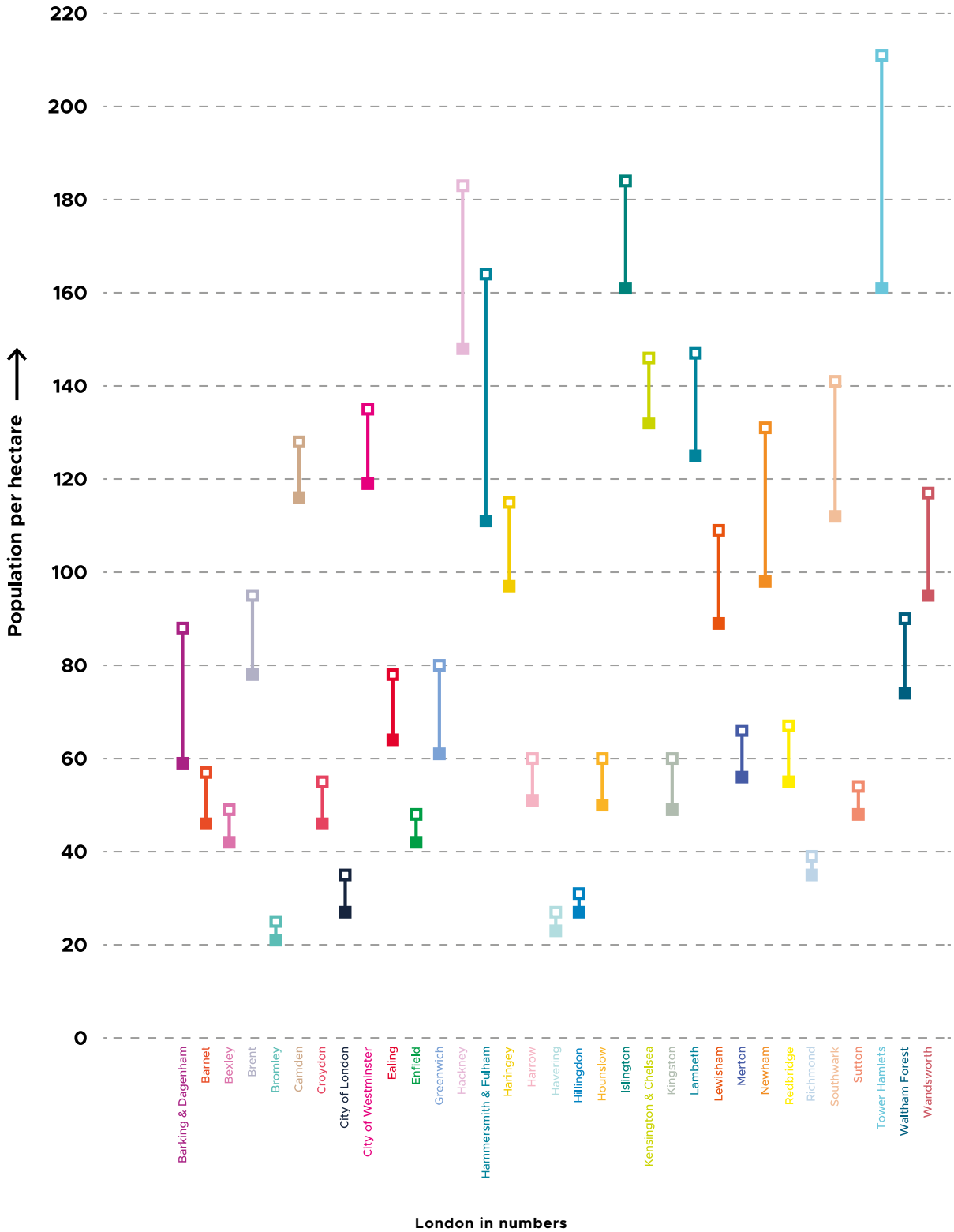


Estimated number of homes provided by the towers found within the NLA London Tall Buildings Survey 2018 pipeline²⁸



Land area and population density per London borough (Population per hectare)²⁹

- Population per hectare 2050
- Population per hectare 2018

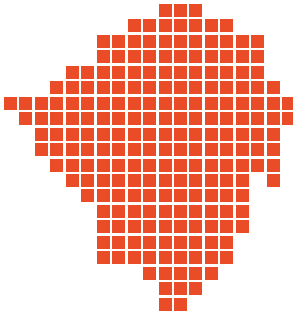


Areas in Focus

Barnet

Barnet is London’s most populous borough with over 364,000 residents, and is well served by direct transport links into the City and the West End. Regeneration is managed by Regional Enterprise (Re), a joint venture between Barnet Council and Capita, which brings together substantial expertise for managing the borough’s growth and development of some of London’s largest regeneration sites. The flagship £4.5 billion scheme at Brent Cross Cricklewood is transforming the area with a revitalised Shopping Centre, new town centre, 7,500 new homes and 27,000 new jobs. Over the next 10 years Colindale will see a large increase in housing and affordable housing, with some 5,000 homes already granted planning permission, underway or completed. The Council’s new Headquarters will move to Colindale in 2019.

- Up to 30,000 new jobs to be created
- Largest population of any London borough
- 2,217 homes built in 2016/17
- New Thameslink Station at Brent Cross
- Orbital travel is a challenge. Radial journeys are relatively easy to make; however, a twenty-minute orbital drive can take over two hours on public transport. Dudding Hill Loop – an unused railway line that runs orbitally – is set to reopen to improve orbital transport
- Two Opportunity Areas at Colindale/ Burnt Oak and Cricklewood/Brent Cross

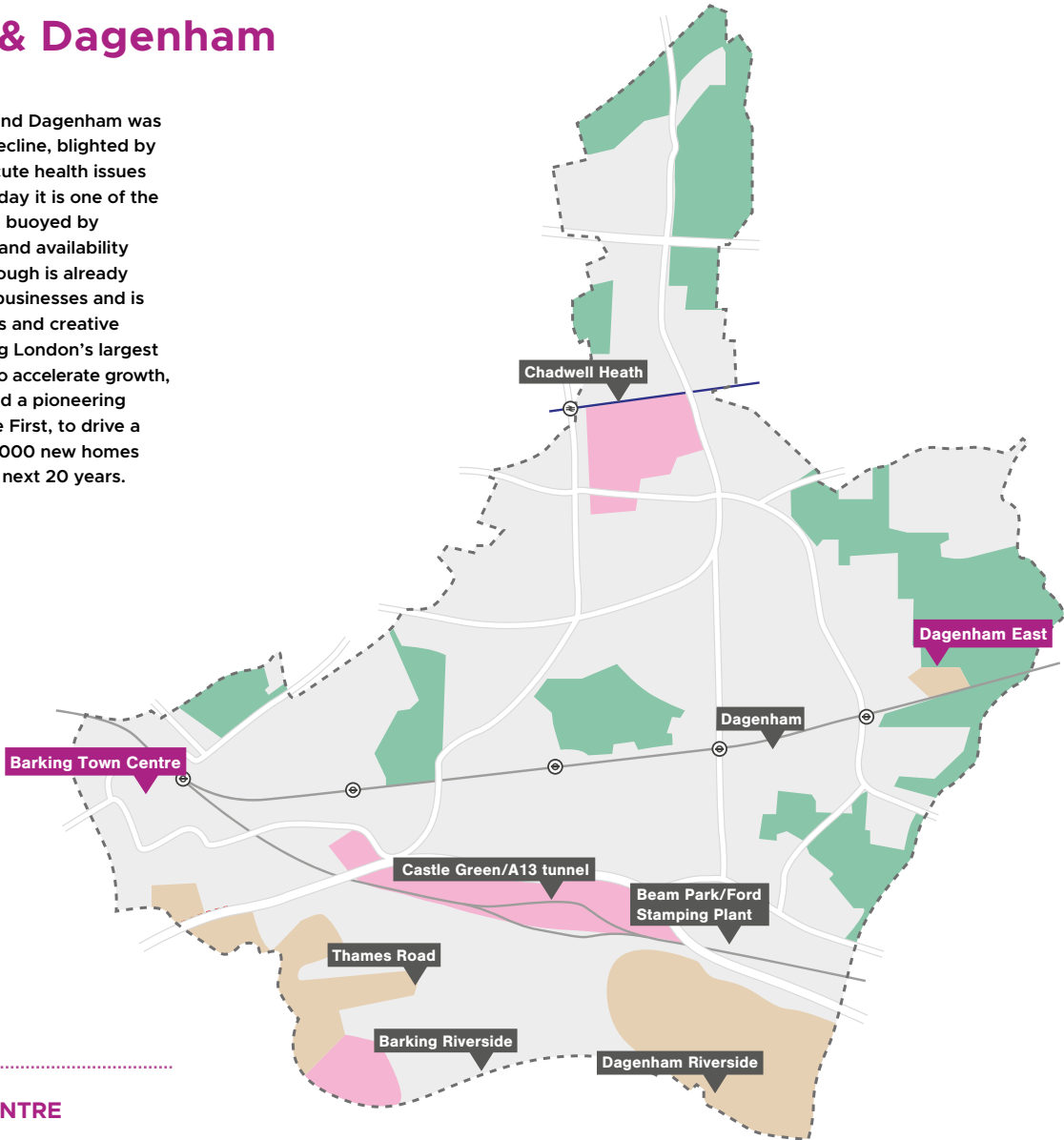
Current Population	364,041	
Forecast population for 2036	470,400	
Number of new homes created per annum (Draft London Plan target)	3,134	

Brent Cross by Chapman Taylor and Callison RTKL for Hammerson and Standard Life Investments



Barking & Dagenham

Not so long ago Barking and Dagenham was a by-word for industrial decline, blighted by poor job opportunities, acute health issues and income inequality. Today it is one of the capital's growth hotspots, buoyed by excellent transport links, land availability and affordability. The borough is already attracting new high-tech businesses and is home to a burgeoning arts and creative industries sector, including London's largest film and media complex. To accelerate growth, the Council has established a pioneering regeneration company, Be First, to drive a programme to deliver 50,000 new homes and 20,000 jobs over the next 20 years.



KEY AREAS

BARKING TOWN CENTRE

Barking Town Centre is rapidly becoming a new creative centre for London, with a wide range of new development underway with the arts and artists industries at their heart, including the 360 Barking development by Swan Housing which features four circular towers with community arts studios on the ground floor. Be First has recently unveiled a futuristic vision for new high density development above Barking Station. Together with Vicarage Field – a new retail, leisure and residential destination – these plans, recently dubbed 'mini Manhattan', will transform life in the town centre, with a dramatic impact on the skyline. A short walk away, development along the River Roding is progressing at speed with new schemes complementing old, including the award-winning Granary building, Countryside's Fresh Wharf, Be's Barking Wharf and Weston Homes' plans for waterside living.

DAGENHAM EAST

Once famous for Fords, this area will be home to a new world class film studios and media complex, and is also becoming a hotspot for high-tech industries augmented by NTT's plan to build two of the largest datacentres in the country. The £1bn investment will cover 55,000 sqm and will be powered by the largest array of solar panels in London. Adjacent to this, the former Sanofi site is now home to Londoneast-UK Business and Technical Park, with a wide range of office, laboratory and other employment space, offering start-up and emerging science-related businesses access to state-of-the-art facilities.

Key

- Regeneration and Growth Areas
- Strategic Employment Areas
- Green Belt / Metropolitan Open Land
- Train and Underground lines
- Elizabeth Line (Crossrail)



Top: Barking Town Centre 'mini-Manhattan' aerial view
Bottom: Dagenham's Film Studio for Pacifica Ventures-MCC

- London's cheapest property and land prices with 400 hectares of developable land
- One of the country's youngest population, with 27 per cent of the population aged between 0 and 15 years old
- Barking is home to the country's first direct freight rail service from China
- The Barking to Gospel Oak Overground line will be extended to Barking Riverside by 2021
- Crossrail Station at Chadwell Heath
- Home to a large section of the London Riverside Opportunity Area

Current Population	208,182	
Forecast population for 2036	265,000	
Number of new homes created per annum (Draft London Plan target)	2,264	

Bexley

Located at the border between London and Kent, in the heart of the Thames Gateway, Bexley’s suburban character is rooted in its large amount of inter-war housing and significant areas of designated open space. Two designated Opportunity Areas provide significant opportunities and drivers for future growth. A draft Growth Strategy plans for significant housing and employment growth, particularly in the north of the borough. However, in order to reach – or even surpass – its future growth proposals the borough is very dependent on road and public transport improvements, with the key public transport intervention being the extension of Crossrail from Abbey Wood to Ebbsfleet (C2E). Other public transport proposals include a bus rapid transit system from North Greenwich to Slade Green and the extension of the DLR from the Royal Docks to Thamesmead and Belvedere.

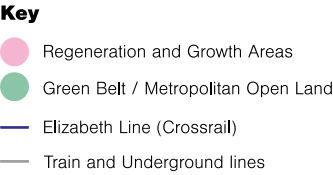
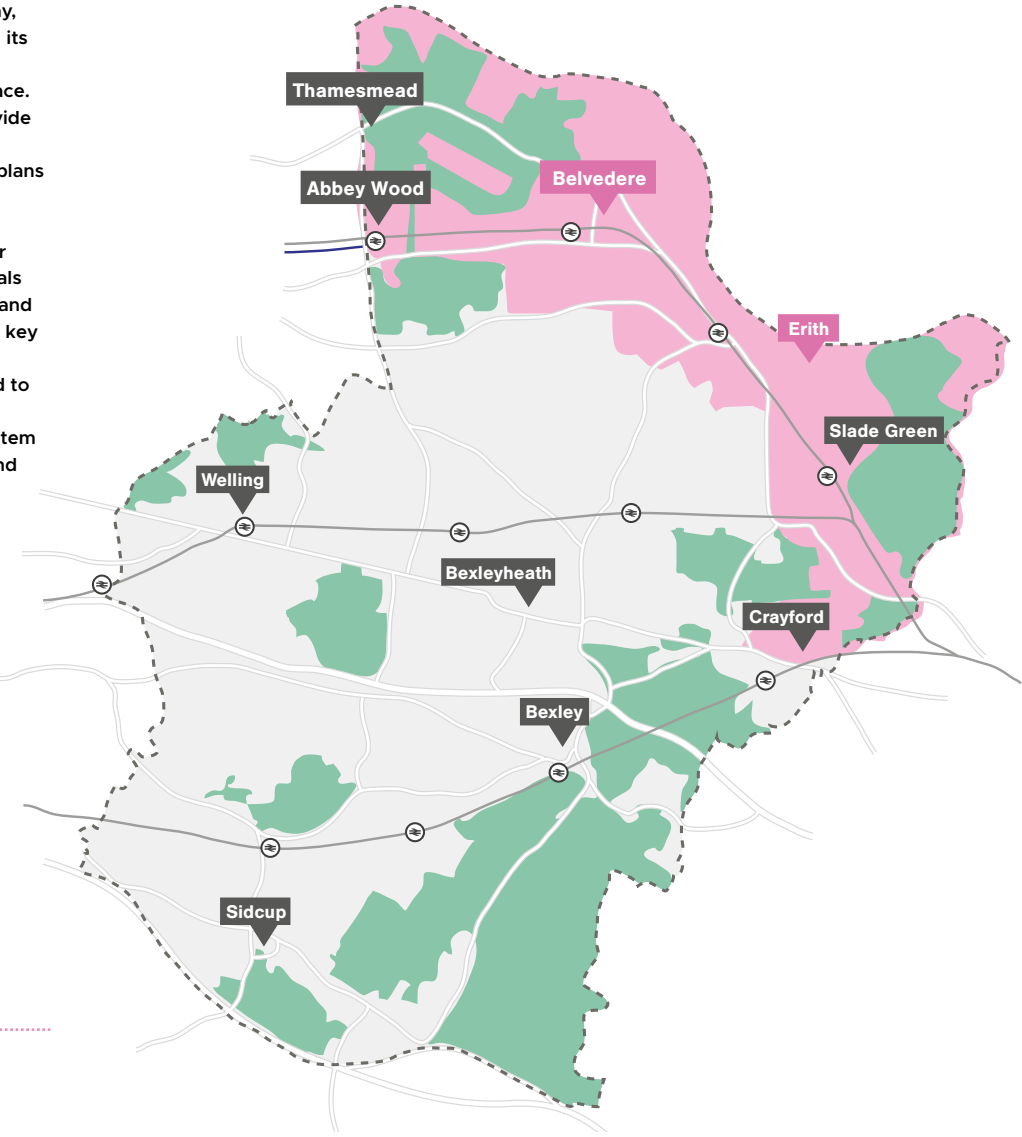
KEY AREAS

Belvedere

Also located within the Bexley Riverside Opportunity Area is the area around Belvedere railway station. This area is identified as a key location for future growth, with potential for up to 8,000 new homes and 3,500 new jobs over the next 30 years, made possible by a step change in connectivity and other essential infrastructure provisions. A new neighbourhood will be created around the station providing a range of improved residential accommodation and served by a new town centre. Slightly further afield is the Belvedere Industrial Area, one of London’s largest employment areas with many traditional industries, a large riverside frontage and significant potential for the intensification and broadening of industrial and business uses.

Erith

Erith is a main town centre situated on the River Thames and included in the Bexley Riverside Opportunity Area. It is seen as a key area for future growth and regeneration, with the potential for up to 6,000 new homes and 2,000 new jobs over the next 30 years, subject to the appropriate infrastructure being provided.



- Bexley received the second largest increase to housing targets in the Mayor’s Draft London Plan – up 179 per cent from 446 homes per annum
- One Crossrail station at Abbey Wood
- Two Opportunity Areas at Bexley Riverside and Thamesmead/Abbey Wood and one Housing Zone
- 18 per cent of the borough is Green Belt



Top: Belvedere
Bottom: South Thamesmead’s central square by Proctor and Matthews Architects & Mecanoo Architecten for Peabody

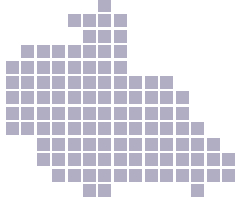
Current Population	244,760	
Forecast population for 2040	300,000	
Number of new homes created per annum (Draft London Plan target)	1,245	

Brent

Brent is seeking to further celebrate its position as one of the most ethnically diverse populations in the world through its role as London Borough of Culture in 2020. In the past few years the borough has seen the large-scale regeneration of South Kilburn and also Wembley, which is experiencing rapid transformation through the development of Quintain's 85-acre Wembley Park which is set to accommodate 20,000 residents, businesses and up to 15 million visitors a year. The council are proactively searching for sites to provide redevelopment opportunities, and are working to secure the delivery of the new West London Orbital rail route to open up new parts of the borough.

- London Borough of Culture for 2020
- Wembley Park is due to become the largest single-site purpose built PRS development in the UK
- Home to two Opportunity Areas at Wembley and Old Oak/Park Royal

Current Population	328,465
Forecast population for 2036:	396,400
Number of new homes created per annum (Draft London Plan target)	2,915



Quintain's Wembley Park

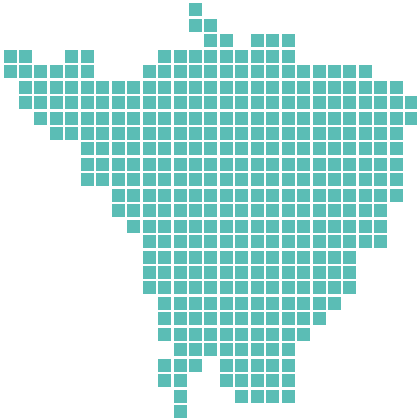


Bromley

Bromley is a largely suburban borough, and is one of the least dense in the capital with a large portion of green belt land, and the highest concentration of farmland in London at 30 per cent. Bromley Town Centre is the focus for much of the growth plans, designated as an Opportunity Area able to provide 2,500 new homes and 2,000 new jobs.

- 51 per cent of the borough is Green Belt
- 22 people per hectare, compared to a London average of 56.6

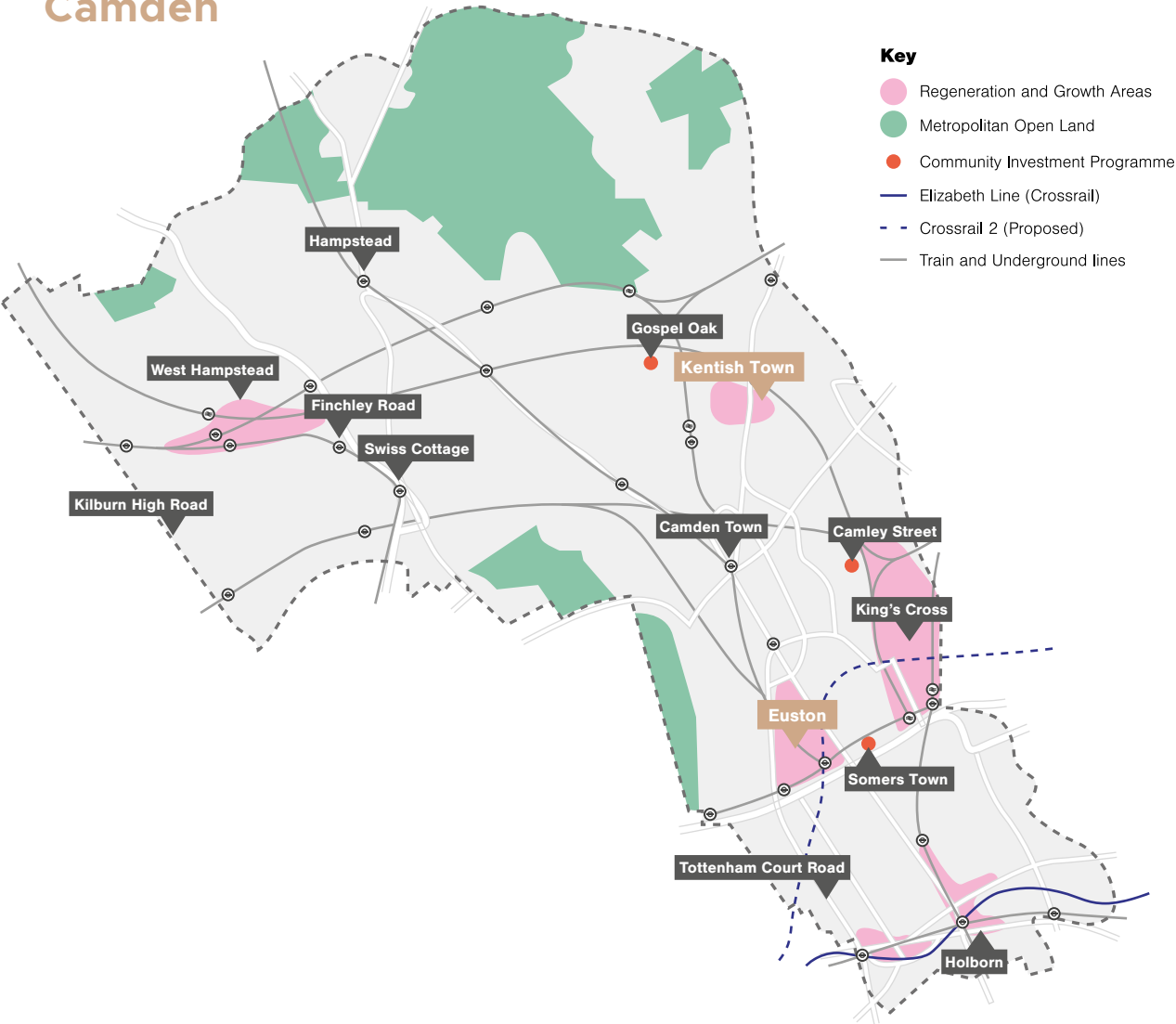
Current Population	330,900
Forecast population for 2036	369,800
Number of new homes created per annum (Draft London Plan target)	1,424



Churchill Gardens, Bromley Town Centre by Stitch for Countryside



Camden



KEY AREAS

Stretching from the Georgian streets of Bloomsbury and Hatton Gardens in central London to the former villages of Hampstead and Highgate in the hills to the north, the borough has been shaped by its railway legacy which created many of Camden's current and future growth areas at the mainline stations of King's Cross, St Pancras and Euston, but also Camden Goods Yard, Kentish Town and West Hampstead. Camden is an incredibly diverse borough, with London's biggest university campus, a cultural offer which includes the British Museum and Knowledge Quarter, numerous hospitals, London Squares, hills and heath, a broad range of housing types and commercial buildings. It is also the gateway to Europe with Eurostar services.

Euston Area Plan

With HS2 terminating at Euston, the area is subject to large-scale change. The Euston Area Plan was adopted by Camden and the Mayor in 2015 and sets ambitious targets for new homes, affordable homes, jobs and open space – creating a new piece of city which helps knit together existing communities. A Planning Brief is now being produced to set out detailed guidance for the design of the emerging stations and related over-site development. Lendlease have been announced as the developer for Euston and are working towards submitting a planning application in 2020. Construction of High Speed Two (HS2) started in late 2017 and ideas for the existing Network Rail station are currently being considered.

Kentish Town

The Council is producing a planning framework for Kentish Town that includes a significant amount of industrial land located behind Kentish Town Road and Highgate Road. The ambition is to intensify the industrial uses in the framework area while introducing new homes, public open spaces and significantly improving pedestrian and cycle movement throughout the area. The Council has completed the first stage of public engagement, with the ambition to adopt the framework in 2019.



Left: Kentish Town map
Right: Euston sketch

Current Population	246,200	
Forecast population for 2036	304,000	
Number of new homes created per annum (Draft London Plan target)	1,086	

- Home to 24,000 businesses (the second highest number in London and the UK) and over 300,000 jobs. ONS estimated that Camden added £26bn to the national economy in 2015, an increase of 38 per cent on 2008
- 11 designated neighbourhood forums, and four neighbourhood plans have passed examination – the most in London
- Camden has 39 Conservation Areas that cover approximately half the borough, more than 5,600 listed buildings and structures, and 53 protected London Squares

- The new Camden Local Plan requires small sites to contribute towards affordable housing – Camden was the first Council to secure a local exception since national policy restricting this was reinstated
- The borough is home to the largest student population in London, with more than 25,700 higher education student residents, 51 per cent of whom are from overseas

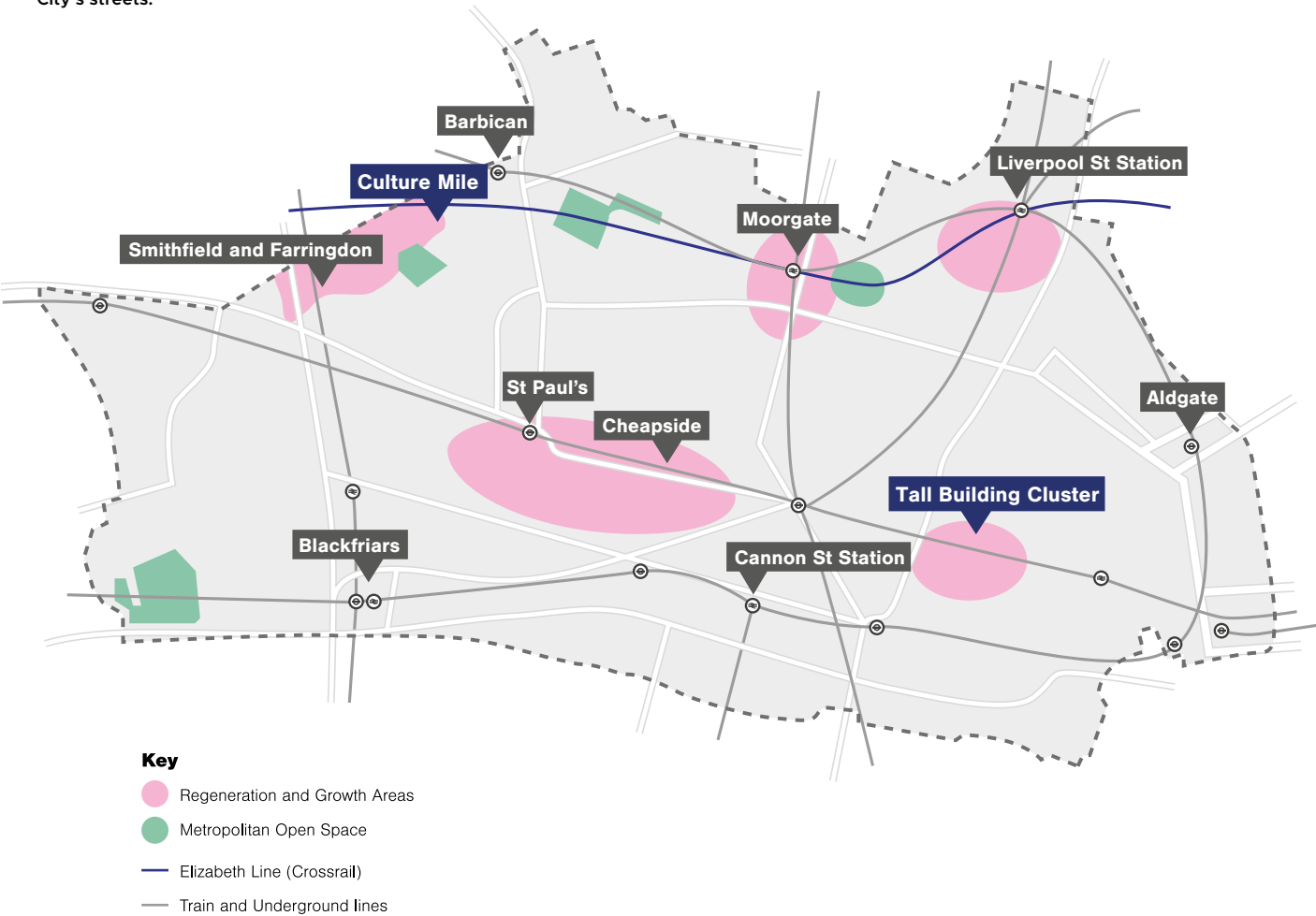
The City of London is the historic core from which the rest of London developed. It is the world’s leading international financial and business centre and a global hub for innovation, providing employment for over 480,000 people who mostly arrive by public transport. Offices form over 70 per cent of all buildings, but the City also houses arts and cultural facilities of international renown, acts as a centre of higher education and health services, and is a retail and visitor destination with a distinctive environment combining modern architecture with historic landmarks and conservation areas. Preparing for significant growth, the City’s Local Plan 2015 requires the protection of existing, and provision of additional, offices that are adaptable to meet the demands of different types of business occupiers. Office space is complemented by other commercial and leisure uses adding vibrancy to the City’s streets.

Tall Building Cluster

Over the next few years, the established cluster of towers, including the Gherkin, the Leadenhall Building and 20 Fenchurch Street will be joined by new towers. The Scalpel, 100 Bishopsgate and 22 Bishopsgate are under construction and permissions are in place for towers at 1 Undershaft, One Leadenhall and 6-8 Bishopsgate. The potential for further towers will be considered using 3D modelling techniques. The changing skyline of the cluster will be complemented by coordinated management of the highways and public realm at ground level and the development of new comfort criteria, alongside consideration of security.

Culture Mile

‘Culture Mile’ is an ambitious and transformational project to create a vibrant cultural destination for arts and culture in the north-west corner of the City over the next 10 to 15 years. Key proposals include a new home for the Museum of London within the Smithfield Market complex and a new Centre for Music located on the Museum of London’s current site. Development will be complemented by comprehensive improvements to the public realm, highways and open spaces and supported by an ongoing programme of arts initiatives.



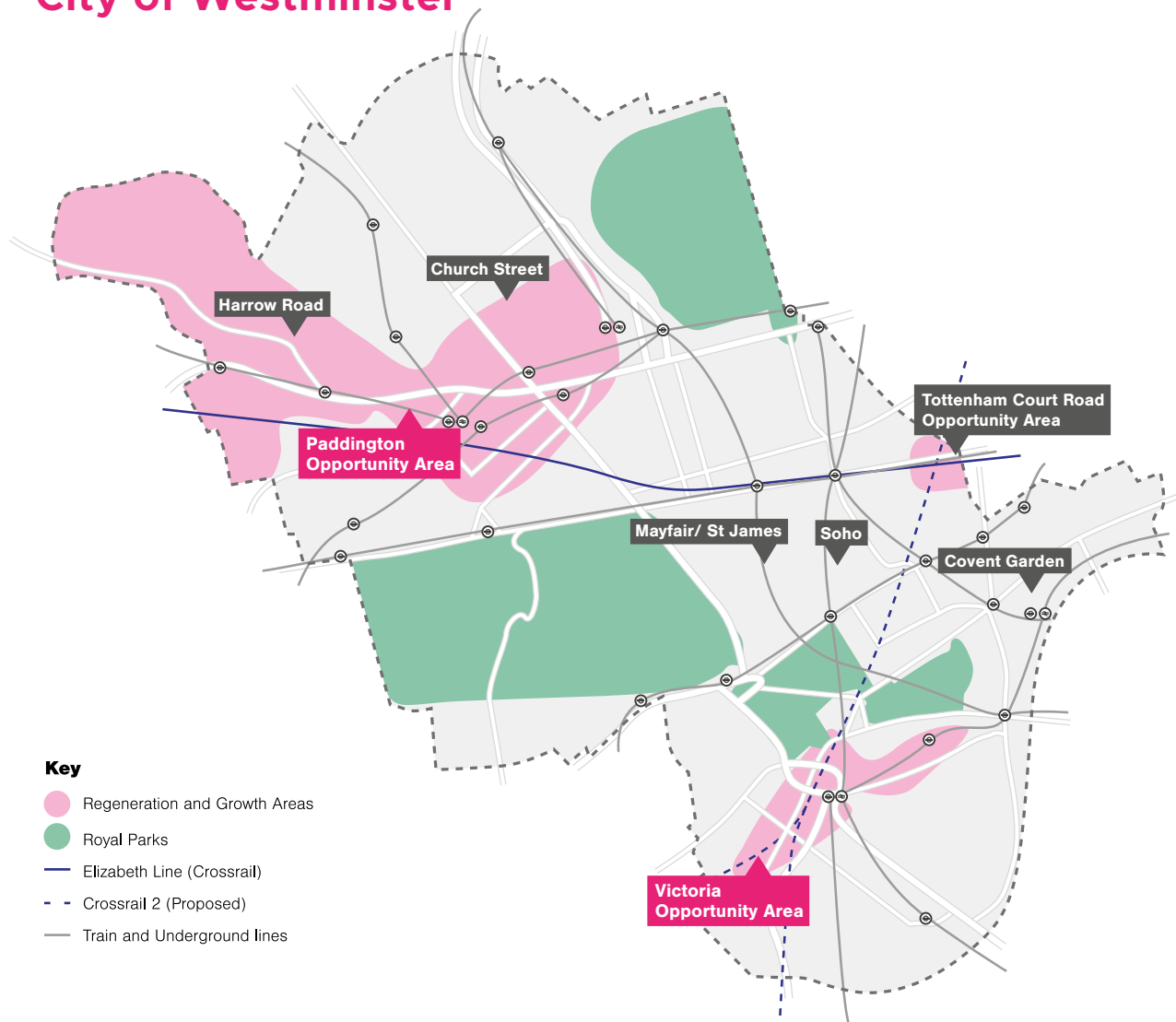
Current Population	7,400
Forecast population for 2036	10,100
Number of new homes created per annum (Draft London Plan target)	146

- Around 1 in 63 UK workers are employed in the City
- 24,420 firms, 99 per cent of which are SMEs
- One of the largest investments in wireless infrastructure ever seen in London: a pioneering, free, gigabit WiFi network
- Over 5,000 hotel bedrooms
- 32 hectares of open space
- 26 conservation areas and over 600 listed buildings
- 77 green roofs covering an area of 40,000 sqm

City Cluster © GMJ and City of London Corporation



City of Westminster



Westminster is home to nearly a quarter of a million people, including 44,000 children. Alongside its diverse communities, the borough has a strong national identity as the seat of Government with many government departments, law courts, places of worship of international importance, embassies and diplomatic institutions, the Monarchy and other functions of the state. It has thriving business clusters, a focus for culture and entertainment, and is a centre of learning and research and a hub for commerce and retailing. This activity is centred on the West End, housing the largest and most diverse concentration of jobs in the UK. Accommodating over 600,000 employees it is also one of the densest employment hubs in the world.

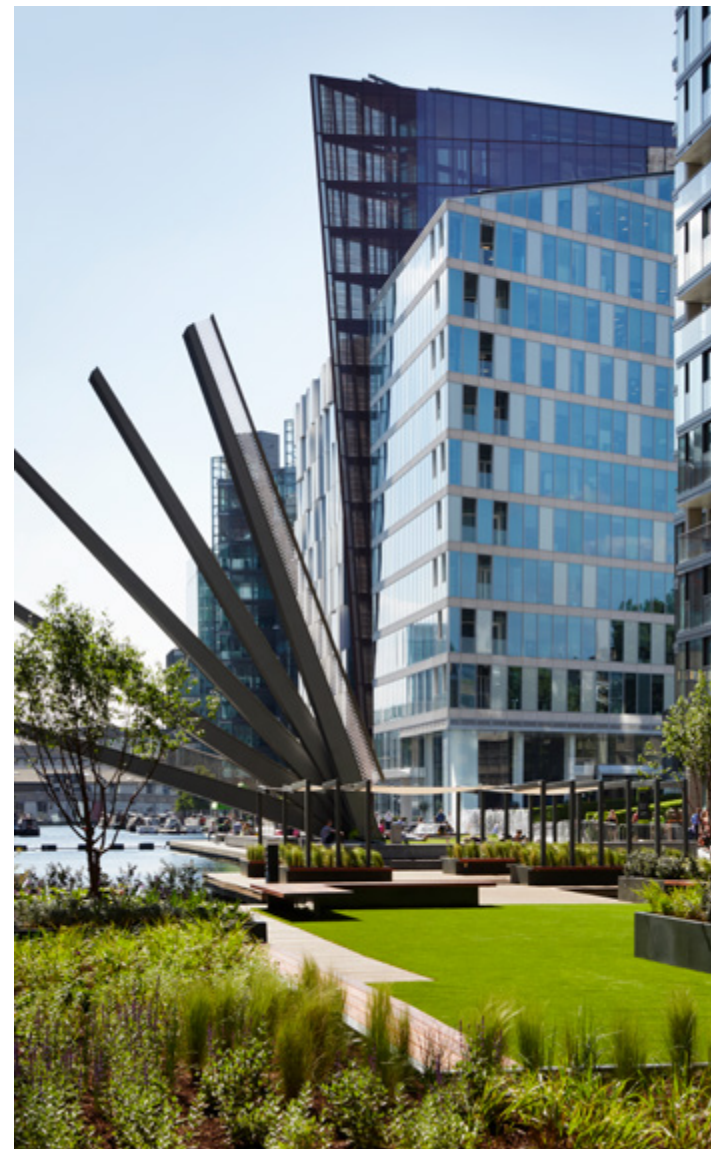
KEY AREAS

Victoria Opportunity Area

Victoria has the potential to deliver at least 1,000 new homes and 4,000 new jobs. Victoria Street, running the length of the Opportunity Area, has experienced substantial developments and change in recent years with the Nova development for example bringing new restaurants, retail and homes to the area. Dominating the south of the Opportunity Area, the Victoria Transport Interchange is undergoing some improvements but there is potential for more enhancements of the public realm, walkability and interchange. There are Crossrail 2 safeguarding directions in place which could result in further significant change should the project go ahead.

Paddington Opportunity Area

Paddington has the potential to deliver at least 1,000 new homes and 13,200 new jobs. The proximity to the West End, existing connection to the expanding Heathrow Airport and the opening of the Elizabeth Line is likely to result in more growth in this area in the form of a range of offices and other commercial development, new social and community facilities, new retail and entertainment uses and there are a number of key sites within the Opportunity Area which can deliver this.



Top: European Land's Floating Pocket Park, Paddington
Bottom: Victoria

- 82,000 new jobs by 2040 and 2 million sqm of new commercial floorspace
- 1,517 homes completed in 2016/17
- 56 designated conservation areas (77 per cent of Westminster's land area)
- Over 11,000 listed buildings and structures, one World Heritage Site, five Royal Parks, 19 protected historic squares and gardens
- 16 designated neighbourhood forums plus one Community Council
- Three Crossrail stations at Paddington, Bond Street and Tottenham Court Road
- Three Opportunity Areas at Victoria, Paddington and Tottenham Court Road
- One Housing Zone at Edgware Road/ Church Street
- 548 hectares (a quarter of Westminster's area) is green space, including three Royal Parks

Current Population	247,615
Forecast population for 2041	277,255
Number of new homes created per annum (Draft London Plan target)	1,010



Croydon

Croydon is a borough of contrasts, reflecting its diverse history. Historically a market town, it is home to Victorian railway suburbs in the north and southwest, and 20th century suburbs on wooded hillsides in the south and east. In its centre, a medieval street pattern hosting the oldest known market is found only a stone's throw away from 20th century listed buildings. Croydon is one of the most populous boroughs in London. It is also outer London's largest transport interchange and the access to people, markets and goods it enjoys, is key to its success. The borough is planning for at least 1,600 new homes a year and over 27,000 new jobs in the next 20 years while respecting and enhancing the history and distinctiveness of each place.

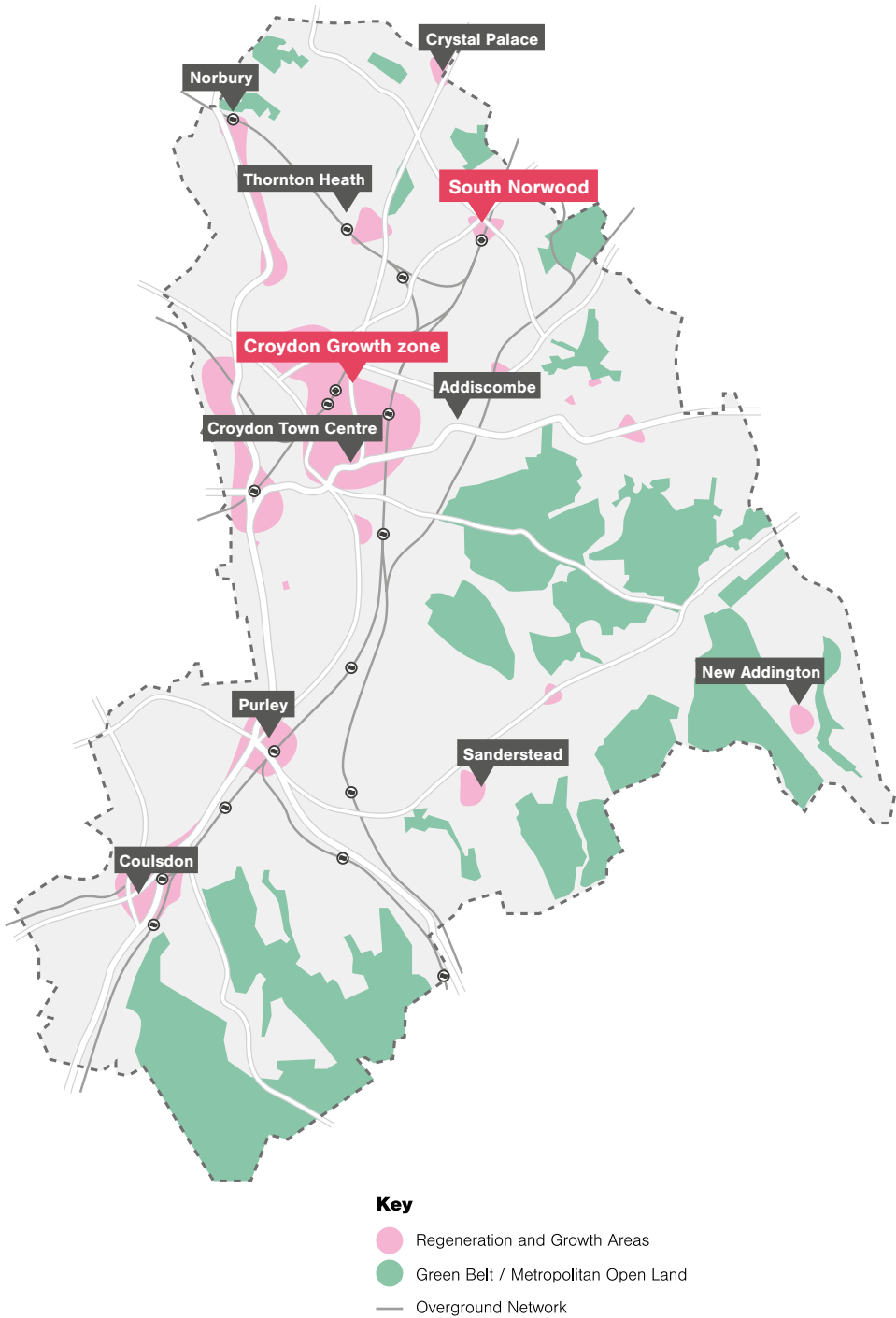
KEY AREAS

Croydon Growth Zone

The Croydon Growth Zone is a £5 billion regeneration programme designed to enable the Croydon Opportunity Area to accommodate projected development and economic growth. It harnesses anticipated business rates growth to fund the infrastructure needed to support growth. A new retail centre, refurbished cultural hub, rail and tram investment, new offices and commercial space and thousands of new homes will all be delivered.

South Norwood

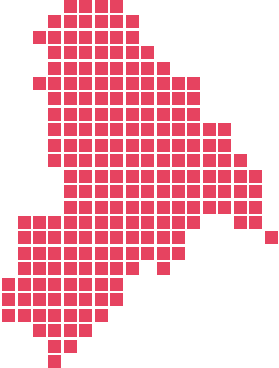
South Norwood is a busy and diverse district centre located in northern Croydon. Its train station and Crystal Palace football club bring significant footfall to the area. Regeneration seeks to support the local economy, strengthen the local community and enhance the area's heritage assets, with some public realm and shopfront improvements already delivered. Brick by Brick – the Council's development company – has two sites in the area. The first, located on Station Road which has already received public realm improvements, will create 14 homes, while the second will add over 100 homes to an existing housing estate, including affordable homes.



Top: High Street South Norwood by HTA for Brick by Brick
Bottom: Boxpark by BDP



Current Population	382,304
Forecast population for 2036	454,085
Number of new homes created per annum (Draft London Plan target)	2,949



- 21 Conservation Areas
- 25 Local Heritage Areas
- 26 sqkm of Green Belt and Metropolitan Open Land (an area larger than many London boroughs)
- Over a third of the borough is open space
- Surrey Street Market has a Royal Charter dating back to 1276 making it the oldest known street market in all of Britain
- The Croydon Opportunity Area encompasses 194 hectares



KEY AREAS

Ealing Broadway

More than £5 billion is being investing in Ealing transforming it from a zone 3 borough into a major office, retail and residential hub with Crossrail zone 1 journey times of around 10 minutes to Bond Street and Heathrow. There is increased office and tall development along the ‘office corridor’ on the Uxbridge Road and North Acton, where Crossrail will connect with the High Speed 2 interchange at Old Oak Common. The council is committed to ensuring developments have a mix of retail, residential and office space in the right locations and local labour is being prioritised in construction work.

Ealing Broadway’s Crossrail station will be twice the size of the current station and will be a more welcoming arrival point. Current investment in the town centre includes British Land’s Broadway Shopping Centre, St George’s Dickens Yard and Filmworks site – an 8-screen cinema, leisure and restaurant destination. The Civic Centre will be redeveloped to include a major residential element and the Town Hall as a hotel/civic chamber. Along the Uxbridge Road, a 170,000sq ft tech-enabled office development is under way, along with a number of new hotels and commercial/office units. The former BHS site in West Ealing is being redeveloped as a new residential development.

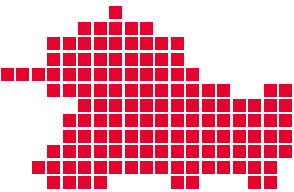
Southall and Greenford

Located on the outer perimeters of the borough, Southall and Greenford will both benefit from significant investment and development over the next decade. Southall will virtually double in size with the addition of Southall Waterside to the west of the existing town centre, with 3,750 apartments, new leisure facilities and retail that the area currently lacks. Greenford’s former GSK site is being redeveloped as a modern neighbourhood with nearly 2,000 homes. Both developments border the Grand Union Canal and will open up neglected canal paths to connect homes to the water and green space.



Top: St George’s Filmworks, Ealing Broadway
Bottom: Greystar’s Greenford Green

- The borough is home to nearly 20,000 businesses and 167,000+ jobs
- Five new Crossrail stations at Southall, Hanwell, West Ealing, Ealing Broadway and Acton Main Line
- A ‘young’ borough – 44 per cent of population are 20–44
- £5billion+ of investment underway in borough
- A fifth of the borough is green and open space
- Mobike – hub free cycle scheme – launched in borough
- Opportunity Areas at Southall and Park Royal/Old Oak

Current Population	344,800	
Forecast population for 2036	395,900	
Number of new homes created per annum (Draft London Plan target)	2,807	

Enfield

Enfield is the capital's most Northern borough, located in the heart of the strategically important London Stansted Cambridge Corridor. The borough is embarking on transformative place-shaping programmes that aim to maximise the rate of housing growth, increase the level of economic prosperity and deliver economic resilience that contributes to London's reputation as an international centre of business and tourism. Enfield is an urbanised centre with access to the 26-mile-long, 10,000-acre Lee Valley Park, as well as being the logistical distribution hub of the capital.

KEY AREAS

The Alma Estate

Led by the Council, the concept of this estate renewal programme was produced through extensive consultation with the local community, resulting in a ballot of residents who opted for comprehensive re-development. Working in partnership with Countryside Properties, the scheme is providing 993 residential units including 200 homes for social rent, new retail and commercial space, a new youth and community centre, gym, medical centre, a renewable energy plant along with new open space and public realm works.

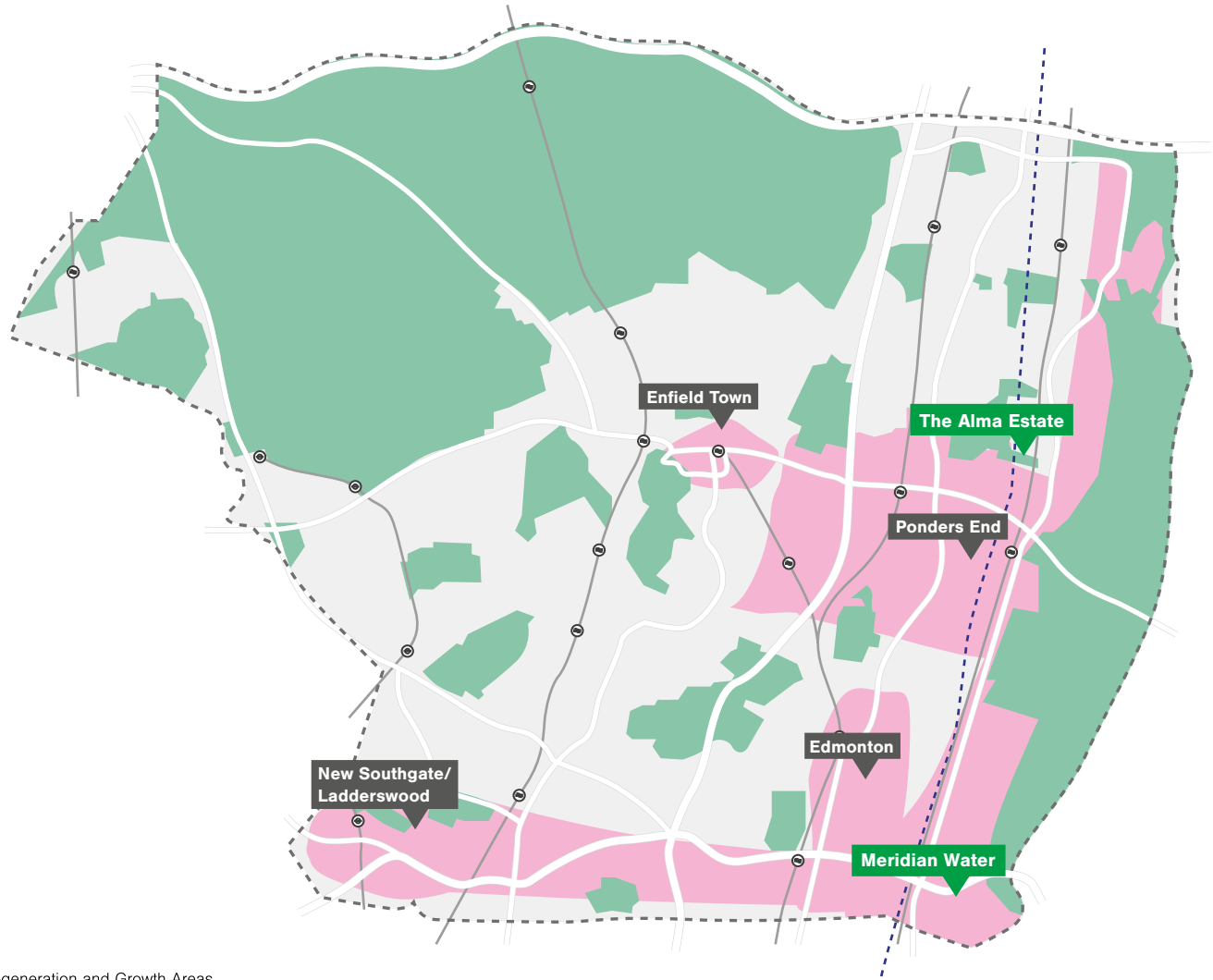
Meridian Water

Meridian Water is the borough's flagship regeneration programme, primed to deliver over 10,000 homes and thousands of new high-quality jobs over the next 20 years. Working with Crossrail, Network Rail and TfL, the new Meridian Water Train station is scheduled to open in summer 2019 providing access to central London in 25 minutes.



Top: Alma Estate by PTEa for Countryside
Bottom: Meridian Water Station by Karakusevic Carson

- 22 Conservation Areas
- 100 km of rivers and waterways
- 2,000 hectares of publicly accessible space
- 2,800 allotment plots
- 130 parks and open spaces
- New Meridian Water train station opens 2019
- 12,965 enterprises
- Home to a large section of the Upper Lea Valley Opportunity Area



- Key**
- Regeneration and Growth Areas
 - Green Belt / Metropolitan Open Land
 - Overground Network
 - - - Crossrail 2 (Proposed)

Current Population	332,127	
Forecast population for 2036	408,000	
Number of new homes created per annum (Draft London Plan target)	1,876	

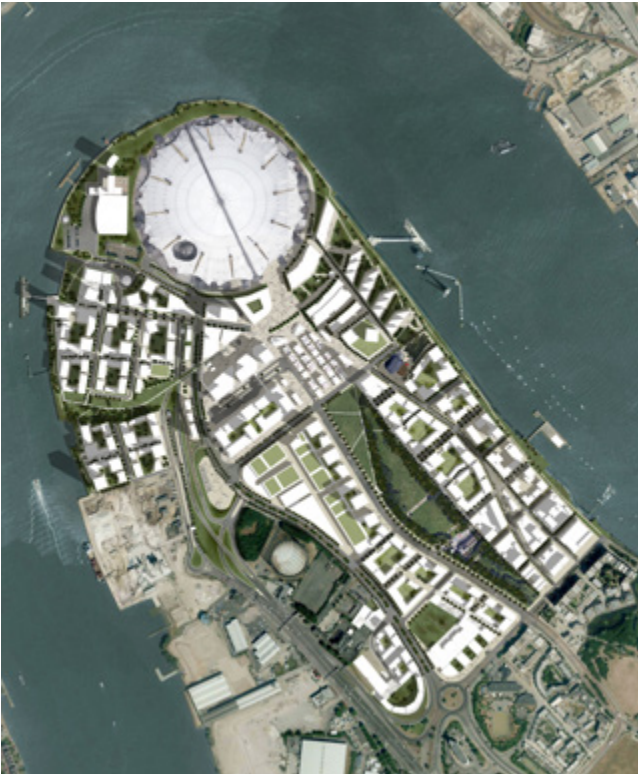
Greenwich

This Thames-side borough is seeing significant change across its neighbourhoods, with five Opportunity Areas – Greenwich Peninsula, Woolwich, Charlton, Deptford Creek and Thamesmead – and several Crossrail stations. The borough seeks to deliver 39,000 additional homes and 21,000 new jobs by 2031, whilst also seeking to protect its heritage – most notably the World Heritage Site at Greenwich Park.

- As of 2017, Greenwich has 68 buildings with 20 stories or more with planning permission, under construction or in the application or pre-app stages. This is the highest of any borough after Tower Hamlets
- 20 conservation areas, 1,000 statutory listed buildings
- Two Crossrail stations at Woolwich and Abbey Wood
- Four Opportunity Areas, at Deptford Creek/ Greenwich Riverside, Greenwich Peninsula, Woolwich, and Thamesmead/Abbey Wood

Current Population	282,800
Forecast population for 2036	363,000
Number of new homes created per annum (Draft London Plan target)	3,204

Top: Greenwich Peninsula masterplan by Allies and Morrison
Bottom: Berkeley's Kidbrooke Village Phase 2 © James Brittain



Hammersmith & Fulham

This inner borough is home to three Opportunity Areas – at Earls Court, White City and Old Oak – which will between them see the creation of 22,000 new homes and 38,000 jobs. With plans for Earls Court and Old Oak remaining underway, the 110-hectare White City Opportunity Area is evolving quickly, with Westfield's newly unveiled £1 billion extension alongside Imperial College's and Royal College of Art's new hubs anchoring plans for 6,000 new homes. Accessibility in the north of the borough will improve with the arrival of HS2 and improved transport infrastructure surrounding the Old Oak Common site.

- 45 conservation areas covering almost half the borough
- The Council and residents have backed ambitious plans that would see the ailing A4 Hammersmith flyover demolished and replaced with a tunnel – reclaiming space above ground for new public realm and buildings
- There are three Opportunity Areas in the borough: Earls Court and West Kensington, White City and Old Oak



White City by Patel Taylor for St James

Current Population	181,900
Forecast population for 2036	258,600
Number of new homes created per annum (Draft London Plan target)	1,648

Hackney

Home to Europe’s biggest single-site estate regeneration at Woodberry Down, Shoreditch’s booming Tech City, and an Olympic legacy site at Hackney Wick, the borough is full of opportunity. At the forefront of tech innovation, enterprise and creativity, Hackney is seeking to ensure the borough remains a place for everyone despite the steepest house price increases in the country, rocketing rents and threats to affordable workspace. The Council is delivering nearly 2,000 homes itself by 2022, with more than half for social rent and shared ownership, alongside new leisure centres, schools and community facilities.

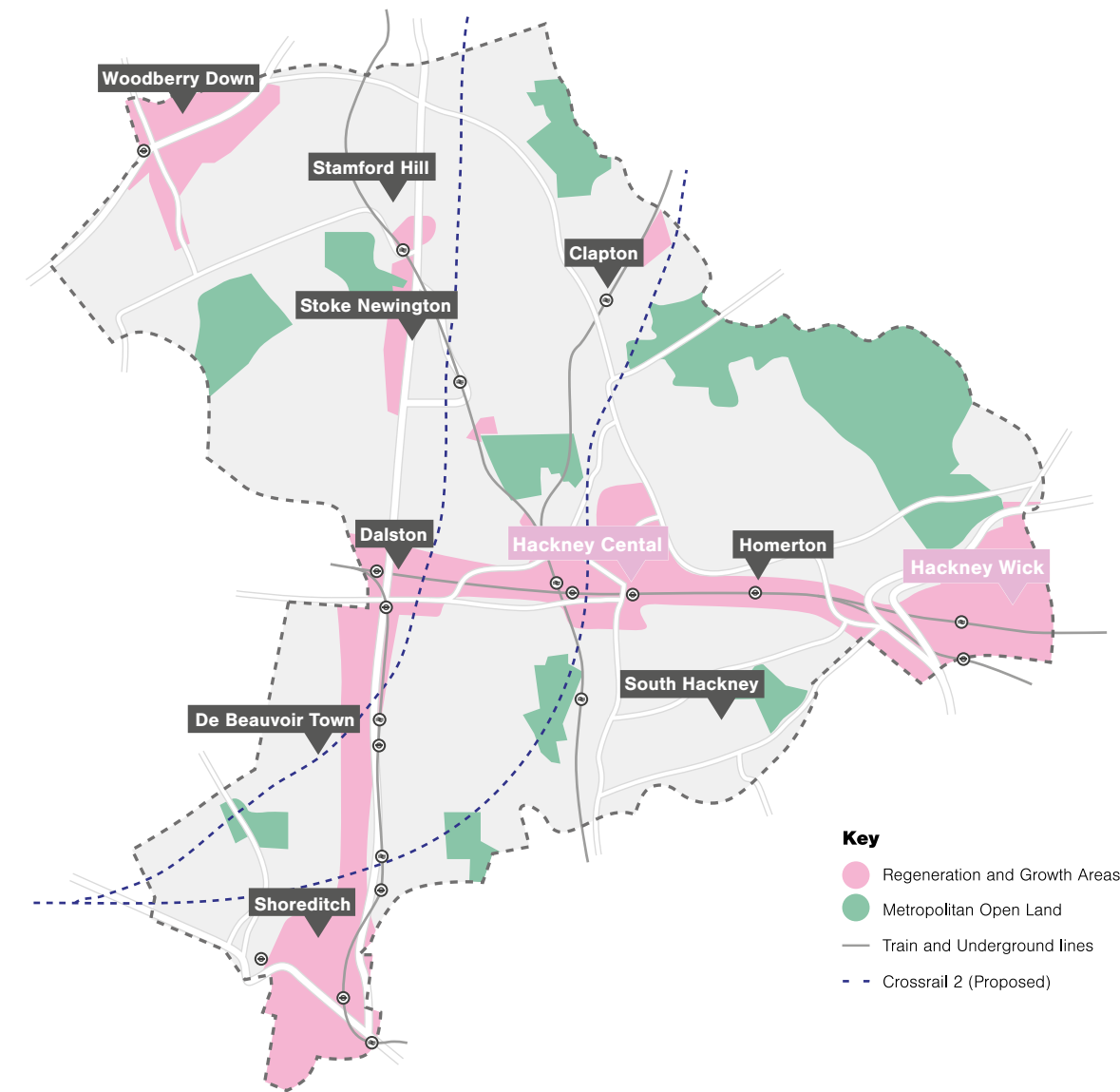
KEY AREAS

Hackney Central

The civic heart of Hackney, this area is a growing cultural, creative and retail destination, with huge opportunities for new housing and employment activity. A dedicated masterplan aims to create 3,000 new jobs and 1,000 new homes, centred around an overhaul of transport infrastructure and public spaces. The Hackney Walk fashion hub is home to world-renowned brands, creating hundreds of jobs and inspiring the next generation of fashion makers.

Hackney Wick

Six years on from London 2012, Hackney Wick has been transformed with a new public park connected by a new network of bridges, alongside world-class sports facilities and the multi-use Copper Box Olympic venue. The 100,000 sqm Press and Broadcast Centre has been reimagined as Here East – a world-leading facility for digital makers, media and creative industries, including BT Sport and Loughborough University. A joint masterplan between Hackney Council and the London Legacy Development Corporation will prevent the area from over-development and ensure that low-cost, genuinely affordable workspace for existing creative businesses – the largest cluster in Europe – can remain part of its future.

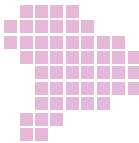


- Hackney Council will build nearly 2,000 homes through in-house direct delivery by 2022 – with more than half for social rent and shared ownership
- Hackney Wick and Fish Island has Europe's largest concentration of artists, with 250 studios and around 100 creative businesses
- Over 14,000 businesses and 88,000 jobs – more than 40 per cent business growth since 2010, with particular emphasis on the tech, hospitality and creative sectors
- Hackney Marshes has the largest concentration of football pitches in Europe
- 1,300 listed buildings, 18 protected London squares, and 30 buildings on Historic England's Heritage at Risk register
- Hackney has seen the highest house price increases in the country over the last 20 years – up over 750 per cent and 17 times the average earning of a household. Private rents have rocketed 20 per cent since 2011
- Only one in three households have a car

Right: Hackney Fashion Hub by David Adjaye Associates
 Right bottom: Here East by Hawkins\Brown © Rory Gardiner
 Left: Kings Crescent Estate by Karakusevic Carson, Henley Halebrown and muf architecture/art for LB Hackney © Peter Landers

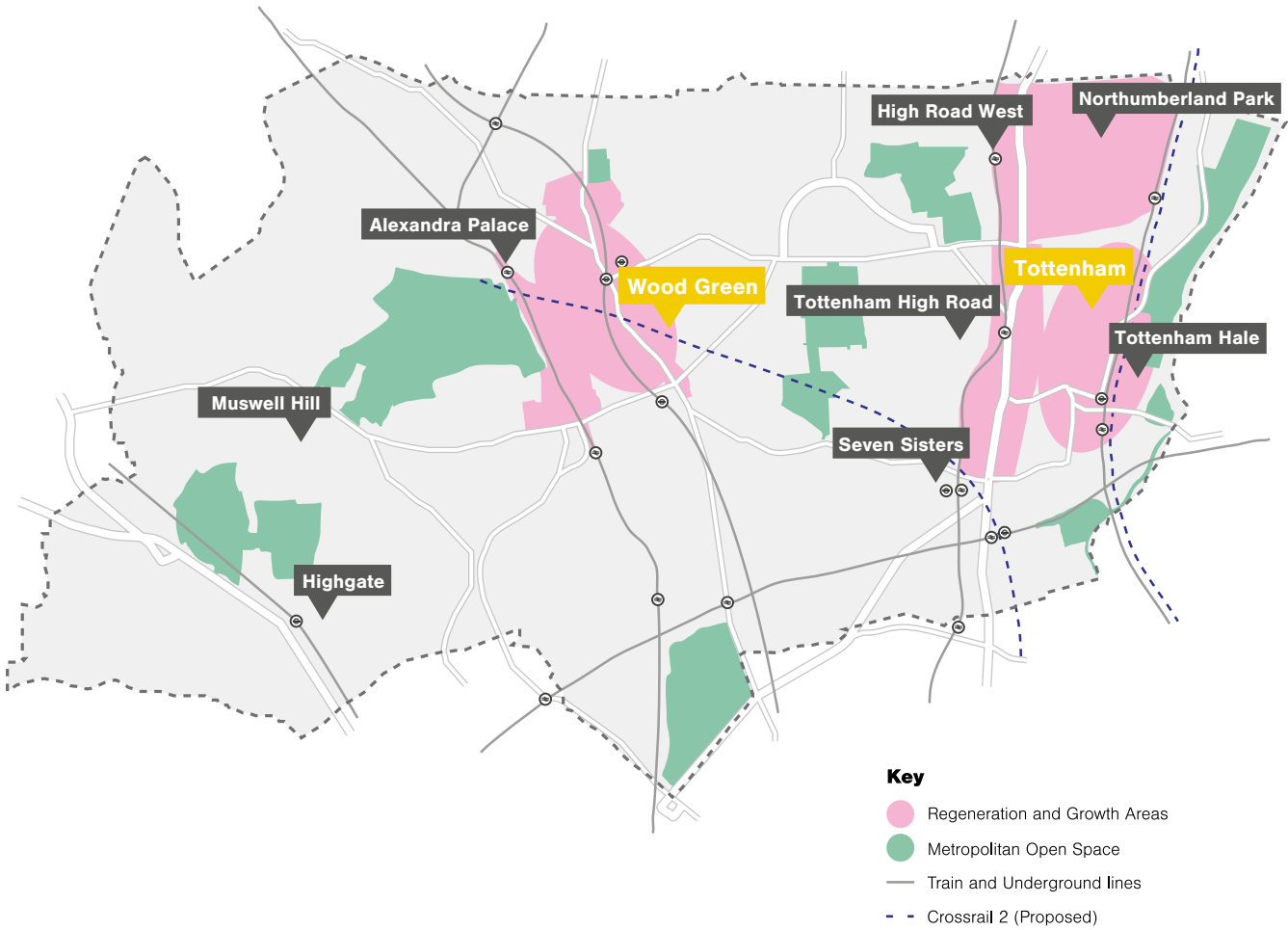


Current Population	262,000
Forecast population for 2036	317,000
Number of new homes created per annum (Draft London Plan target)	1,330



Haringey

Capitalising on the borough’s excellent transport links, schools and cultural scene, Haringey has enormous potential for growth, with major investment underway to bring forward new homes and jobs for all.



KEY AREAS

Tottenham

Tottenham is London’s first and largest housing zone and is set to deliver 10,000 much needed new homes - including new council homes - and 5,000 new jobs by 2025. The Council are working with development partners such as Grainger, Lendlease and Argent Related to bring investment and opportunity to the area.

Wood Green

Wood Green is the borough’s biggest town centre with a diverse array of shops and businesses. Planned improvements to the Piccadilly line will increase peak period capacity by 2025. Ambitious plans are underway to bring forward more than 6,000 new homes, 4,000 new jobs and significantly boost economic development.



Left: ADA, the National College of Digital Skills in Tottenham Hale
Right: Blue House Yard by Jan Kattein Architects for LB Haringey



- On track to deliver 10,000 homes in Tottenham by 2025
- London’s largest Housing Zone with £100m investment to support housing and infrastructure
- Independent analysis shows that Haringey will enjoy the fastest jobs growth in the capital during the next 20 years: an increase of 23 per cent, compared to 13 per cent in zone one and an average 16 per cent in zones two and three

- Tottenham Hotspur’s state-of-the art c.61,000-capacity stadium is expected to attract 2.5 million annual visitors. It will be the first UK stadium with a retractable pitch
- The borough is home to Alexandra Palace - the birthplace of television – Haringey’s most famous landmark

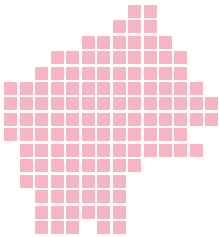
Current Population	267,540	
Forecast population for 2036	309,800	
Number of new homes created per annum (Draft London Plan target)	1,958	

Harrow

Home to the famous Harrow School, this borough also contains a number of small historic villages and farmsteads, connected by twentieth century ‘Metroland’ development. In the opportunity of a generation, the Council is leading a regeneration programme that will change the landscapes of both Harrow and Wealdstone town centres and bring forward thousands of new homes, new shops, offices, schools, public spaces and green spaces, cultural and leisure facilities, transport improvements and public facilities.

- 3,000 new jobs created alongside 100 apprenticeships every year
- More than 2,000 homes to be delivered on Council-owned land
- The Harrow and Wealdstone Opportunity Area encompasses 177 hectares

Current Population	252,100
Forecast population for 2036	283,200
Number of new homes created per annum (Draft London Plan target)	1,392



Byron Quarter by Karakusevic Carson for LB Harrow

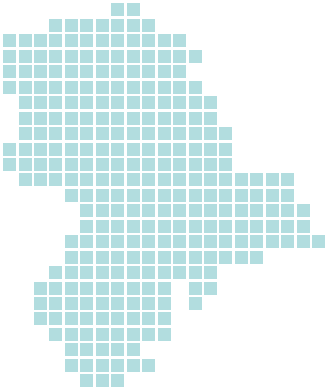


Havering

Characterised by its low-density neighbourhoods and the largest quantity of green space of any London borough, Havering has the potential to be one of the capital's next big growth areas, with the Elizabeth Line arriving in 2019 and a new station at Beam Park by 2020. Rainham and Beam Park, sited within the London Riverside Opportunity Area, have the capacity to provide 26,500 new homes across the area.

- 53 per cent of the borough is Green Belt
- The highest proportion of open space of any London Borough
- Largest share of elderly residents of any borough
- Home to a large section of the London Riverside Opportunity Area
- Three Crossrail stations at Romford, Gidea Park and Harold Wood

Current Population	256,200
Forecast population for 2036	308,800
Number of new homes created per annum (Draft London Plan target)	1,875



Romford Town Centre Development Framework by Tibbalds for LB Havering



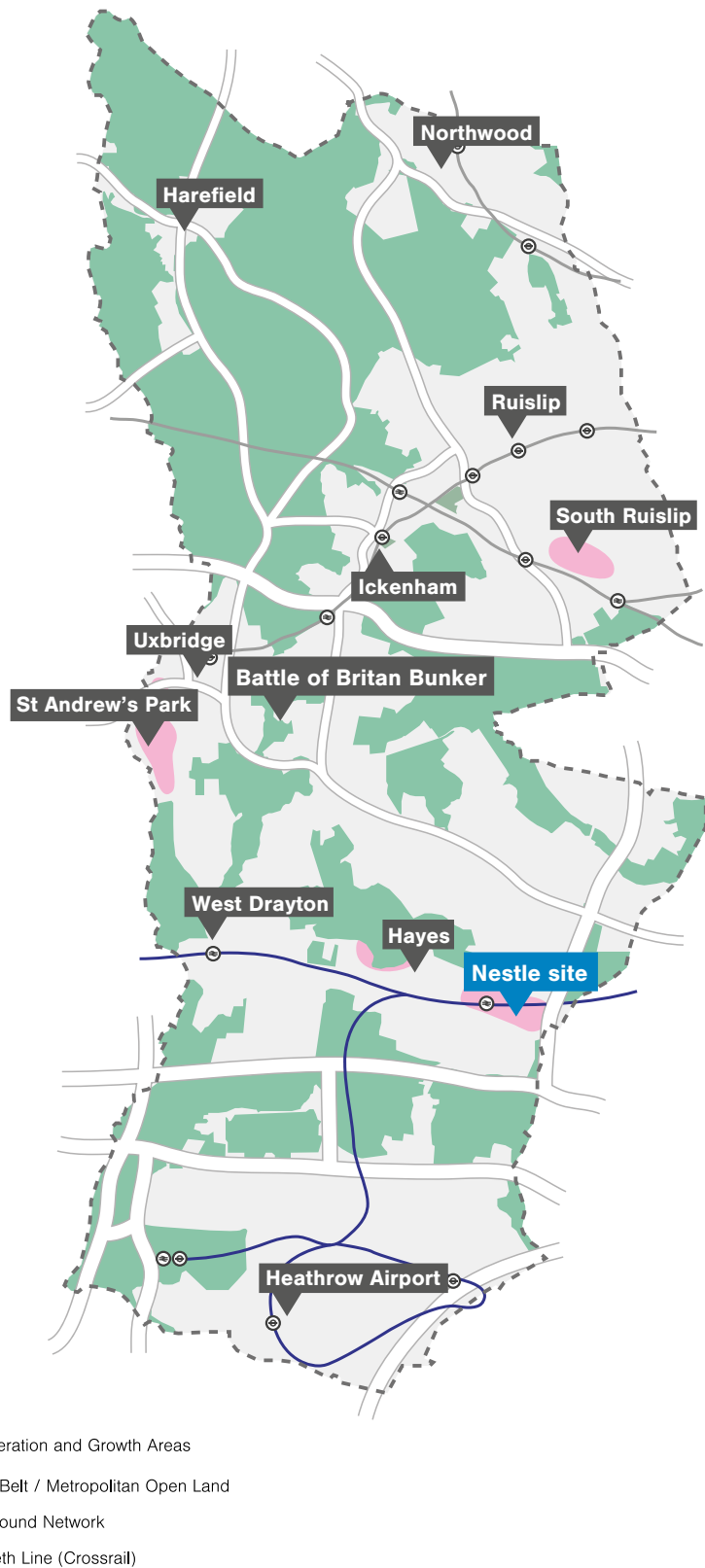
Hillingdon

Hillingdon has more award-winning spaces than any other local authority in the UK, with 50 green flag parks, acres of ancient woodlands and miles of canals, lakes and rivers. The Council is working with development partners on its Housing Zone in Hayes, where mixed-use developments at the Old Vinyl Factory and the former Nestle site will deliver 640 and 1,300 homes respectively when complete, and create hundreds of jobs. Investment in Hillingdon's logistic sector continues with both SEGRO and Pro Logis taking advantage of Hillingdon's connectivity and location, paired with investment in the office sector with large businesses including British Airways, Coca-Cola and GSK Hertz. Hillingdon has two international airports at Heathrow and Northolt. Existing rail connectivity – with lines into both Paddington and Marylebone – will be enhanced by the Elizabeth line from 2019.

KEY AREA

Nestle site

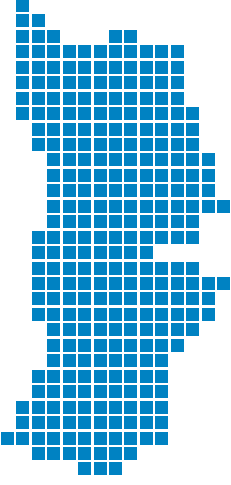
Developed by SEGRO and Barratt London, this high-quality urban regeneration project is transforming the old Nestle Factory site, building nearly 1,400 new homes whilst retaining four locally listed structures: the Factory, Canteen Hall, Gatekeepers Lodge and the railings and gates to Nestles Avenue. Over three hectares of publicly accessible landscaped green space and courtyards – over a third of the site – will be provided, alongside a restored canal frontage and a new employment centre with up to 530 jobs on site.



Top: Former Nestle Factory, Hayes, masterplanned by Makower Architects for SEGRO and Barratt London

Bottom: Brickfields by Rolfe Judd for Access Self Storage

Current Population	307,039
Forecast population for 2036	348,099
Number of new homes created per annum (Draft London Plan target)	1,553



- The Central Research Laboratory is leading the manufacturing revival with cutting edge technology and business support
- The Council has invested £149 million to increase school provision, creating 6,645 new primary school places since 2011
- Hillingdon's housing targets have increased by 178 per cent in the Mayor's Draft London Plan – up from 559 homes per annum
- New Crossrail stations at Heathrow, West Drayton and Hayes & Harlington

Hounslow

Hounslow is a growing borough, with an emerging 10-year housing target of 21,820. As part of this overall target, the council has pledged to secure 5,000 new homes as affordable homes (3,000 for social rent, 2,000 shared ownership) by 2022. As one of the most economically active boroughs in London, Hounslow is home to almost 15,000 businesses including multinationals such as GSK and Sky. The Council is preparing a Great West Corridor Local Plan Review, which seeks to transform the Opportunity Area into a leading business destination for the 21st century, whilst the West of Borough Local Plan Review is being prepared to deliver business growth and housing development for the Heathrow Opportunity Area. These emerging plans will see new workspace for 25,000 new jobs in the area, setting out the Council's vision and plan for sustainable growth over the next 15 years.

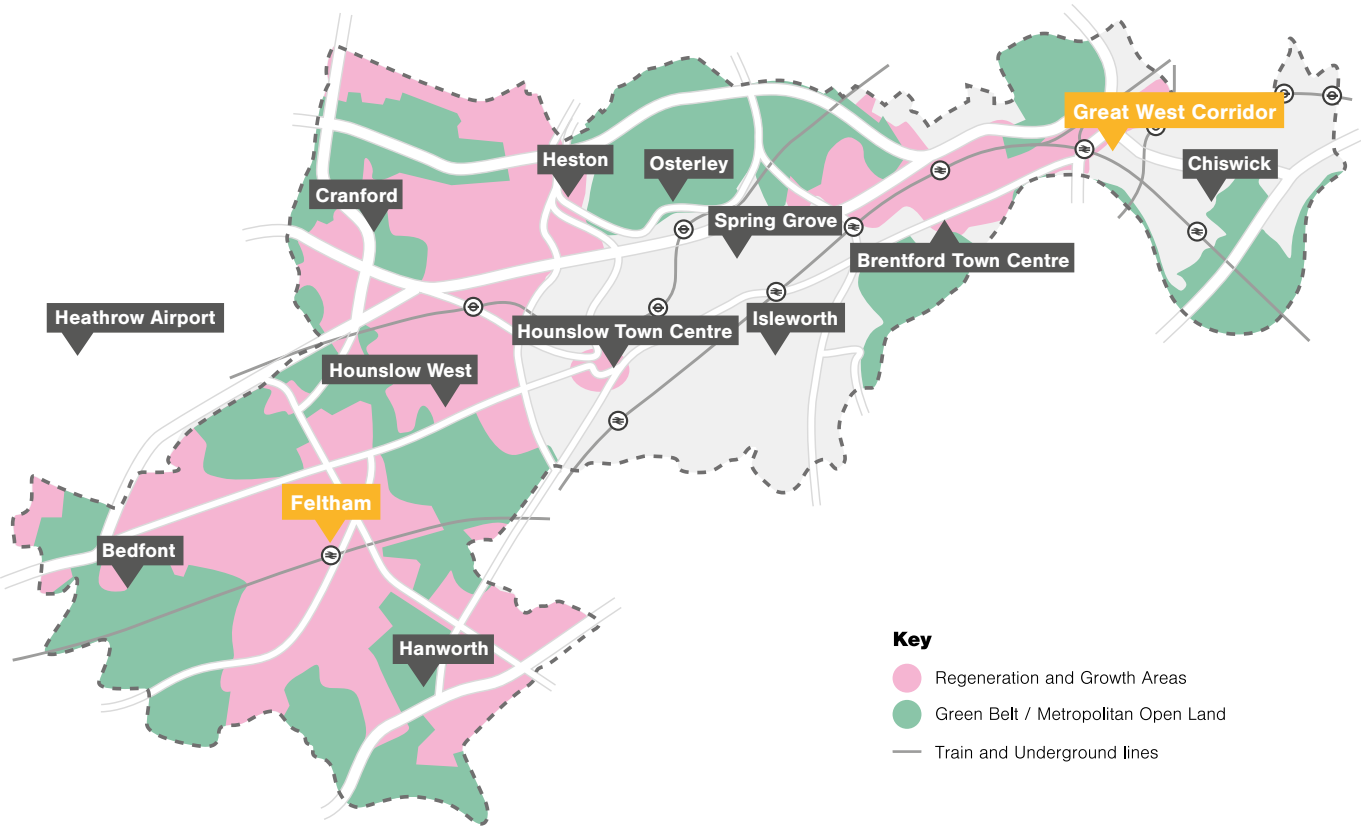
KEY AREAS

Great West Corridor

Building on the innovation of the ‘Golden Mile’ that developed in the 20th century interwar period, the Council is seeking for the Great West Corridor to be transformed into a leading 21st century business destination, providing high-grade workspaces for multinational corporations in high-growth sectors such as hi-tech, media and pharmaceuticals. This Opportunity Area also seeks to deliver well-designed mixed-use developments providing residential and employment uses supported by improved transport accessibility and community infrastructure.

Feltham and West of Borough

The West of Borough area forms part of the Heathrow Opportunity Area which has the potential to deliver significant growth in housing and employment opportunities. The area's proximity of Heathrow will mean optimal supply chain opportunities and the continued major representation of cargo and logistics businesses supporting the airport. The Feltham Town Centre in particular is expected to deliver a large proportion of new homes as part of the Feltham Housing Zone. It is anticipated that the release of two large MOD sites in the area could deliver c.2,300 homes. The Heathrow Opportunity Area will be further defined once the future role of the airport and its configuration is confirmed.



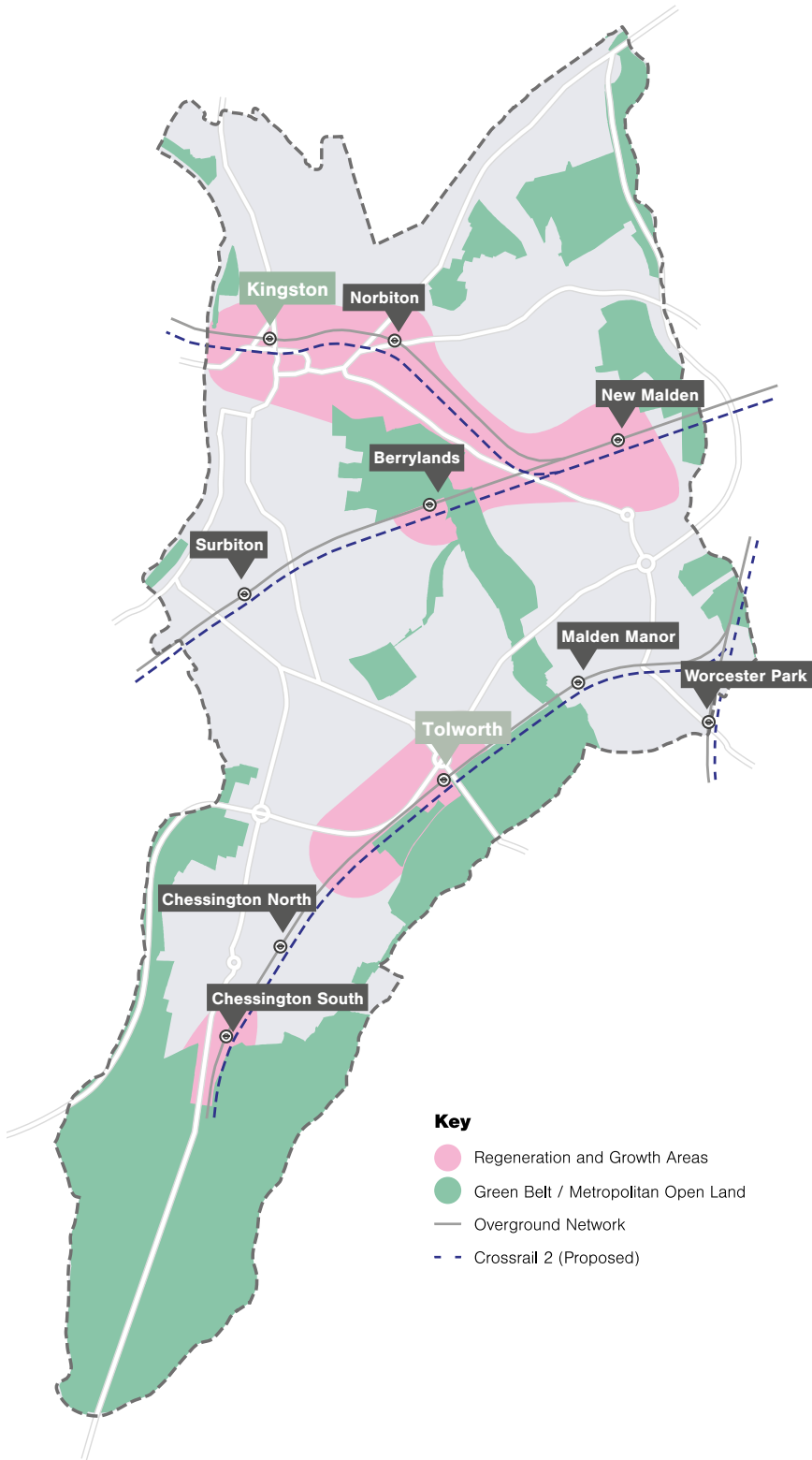
Current Population	278,000	
Forecast population for 2036	322,400	
Number of new homes created per annum (Draft London Plan target)	2,182	

Top: Heathrow Gateway
Bottom: Golden Mile



- 1,211 new homes completed in 2016/17
- 14,930 businesses
- 28 conservation areas
- Two neighbourhood forums (Butts Farm and Osterley)
- Two Opportunity Areas (Heathrow Opportunity Area and Great West Corridor) and two Housing Zones (Hounslow Town Centre and Feltham)
- 1,219 hectares of Green Belt and 777 hectares of Metropolitan Open Land
- Overground rail extension to Hounslow (West London Orbital)

Kingston upon Thames



Kingston has a rich offering of culture, arts, heritage, open spaces and high performing retail and educational facilities. With increased housing targets and the potential arrival of Crossrail 2 to all 10 of the borough's train stations, Kingston is set to change. The Council is working with its community and stakeholders to collectively take a proactive approach to support and shape its future. Ambitions to support a range of businesses including SMEs, hardware culture and diversify the economy are recognised as key elements to retain local talent and support sustainable development. Kingston's emerging Opportunity Area, Local Plan and development and potential Crossrail 2 stations will all help support and shape the borough's ambitions.

KEY AREAS

Kingston Metropolitan Town Centre

The regeneration of the town centre is a priority, with plans in place to ensure the delivery of commercial, residential and public amenities to complement its existing offer. The redevelopment of North Kingston is underway, delivering new educational, residential and community uses alongside a new public open space. Kingston University is investing in their education facilities, including the delivery of the award-winning Town House. The area has also benefited from significant investment in cycle infrastructure and public realm through the Go Cycle programme as part of TfL's Mini Hollands Programme.

Tolworth

Tolworth is another key area of change with the emerging Opportunity Area and proposals for Crossrail 2. Kingston has worked with the GLA and TfL to develop an Area Plan setting out a high level and flexible framework for the future of this area. There has already been significant construction with a 137-bed hotel and a new 106-unit housing estate, and there are a number of key development sites to be commenced providing approximately 1,200 residential units. The approved Lidl UK Headquarters represents a £100 million investment in the borough, delivering 750 jobs. TfL and the council are working together to ensure the right infrastructure is in place to support its future success.

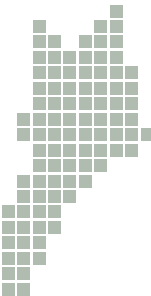


Top: Kingston Town Centre aerial
Bottom: Tolworth



- Site of the coronation of the first king of all England
- Third smallest borough in population size
- 26 Conservation Areas
- 1 Neighbourhood Forum (North Kingston)
- 1,184 hectares of green space – the equivalent of 32 per cent of the total borough area and 4 km of riverside
- £30 million investment in Go Cycle scheme
- The first free 24/7 wifi in London – Connecting Kingston provides borough-wide Wifi, faster broadband and better reception. The second phase of the project will be connecting small cell technology across the borough to collect and analyse data around environmental themes
- Kingston is home to the largest Korean community in Europe (an estimated 20,000 individuals in and around New Malden); it is also home to large Tamil, Indian and European communities

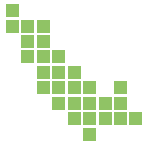
Current Population	176,107
Forecast population for 2036	211,396
Number of new homes created per annum (Draft London Plan target)	1,364



Kensington & Chelsea

Home to world-renowned museums, hospitals and heritage, RBKC is typically regarded as a place of great wealth – however alongside some the highest property prices in the country lie areas of great deprivation. It is the Council's challenge to build upon the strength of the communities which make up these areas and to provide them with the facilities, the homes and the opportunities that they need. Future development will focus on West Kensington and Kensal Canalside, alongside estate regeneration, to deliver affordable homes whilst balancing the needs of local communities and retaining the borough's existing heritage. The Kensal Canalside Opportunity Area – the last remaining large brownfield site in the borough – in particular offers the opportunity to meet a significant part of the borough's housing needs, but requires significant infrastructure investment to unlock capacity.

Current Population	156,190
Forecast population for 2036	174,815
Number of new homes created per annum (Draft London Plan target)	488



- London's fourth highest population density
- 1,330 listed buildings
- The Council saw a big change at the elections – two thirds of councillors stepped down
- The Kensal Opportunity Area is a challenge, with a difficult site in multiple ownership
- Three Opportunity Areas

Earls Court Opportunity Area by KPF



London Legacy Development Corporation (LLDC)

Covering sections of the London Boroughs of Hackney, Newham, Tower Hamlets and Waltham Forest, this mayoral planning authority encompasses 480 hectares as part of the legacy for the London 2012 Olympics, and is responsible for the regeneration plans following the London 2012 Games including overall responsibility for the Park, ownership of the permanent venues and development powers. Following much successful development in recent years, a number of large schemes are due to come forward over the next decade, providing many thousands of new homes in neighbourhoods at Chobham, Bromley-by-Bow, Eastwick and Sweetwater, Hackney Wick, Pudding Mill Lane. A new culture and education hub at Stratford Waterfront is soon to be home to occupiers including the V&A, UCL and Sadlers Wells.



- The Queen Elizabeth Olympic Park is one of the largest new urban parks in Europe for 150 years, with 560 acres of parkland
- Here East, the former broadcast centre, has been transformed into a digital and creative hub with organisations including BT Sport, PlexallInnovation Hub, UCL and Loughborough University
- Westfield Stratford is one of the largest and most successful shopping centres in Europe

V&A East by O'Donnell + Tuomey



Lambeth

With the potential for more than 40,000 new jobs and 32,000 new homes over the next 20 years, the council is working closely with investors and developers to drive inclusive growth to secure high quality, mixed-use, good jobs driven growth, with positive outcomes for all the community. Since 2014, the council's use of CIL has produced a 10 per cent increase to neighbourhood funding to support local communities as change and growth happens.

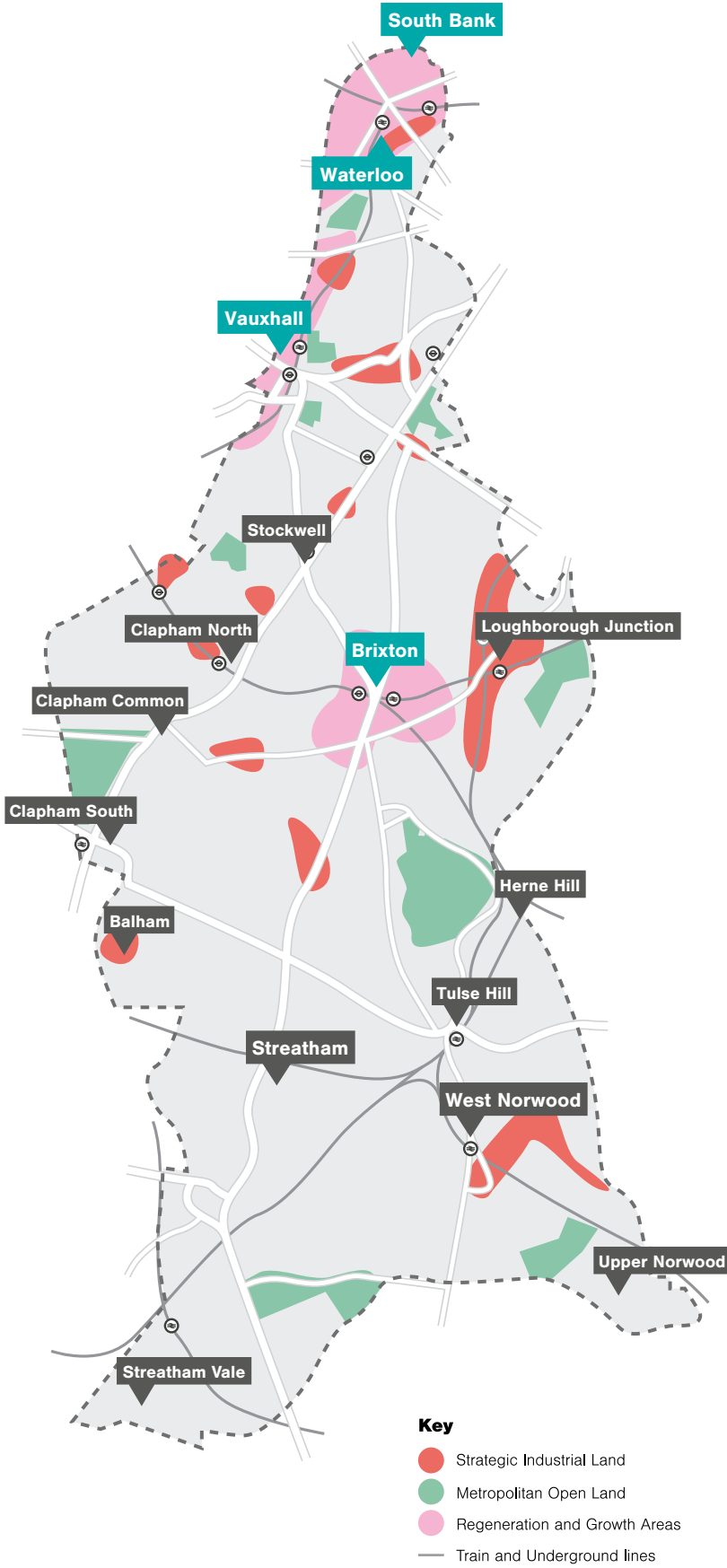
KEY AREAS

South Bank

South Bank and Waterloo are pivotal to economic growth for both Lambeth and London, with designated Opportunity Area status and the potential for 15,000 new jobs and 1,900 homes. Major renovations of the Waterloo International Terminal are creating a new retail and leisure quarter supporting 700 jobs. The Waterloo West Economic Vision is focusing on underdeveloped areas and will guide future investment. Vauxhall is London's fastest changing riverside district, with the wider Vauxhall, Nine Elms, Battersea Opportunity Area delivering up to 25,000 new jobs and 18,000 new homes. The removal of the current gyratory system will create a new district town centre, catering for increasing numbers of residents, workers and visitors.


Brixton

Brixton is world renowned for its extraordinary character, rich diversity and heritage. The Brixton Economic Action Plan sets out the opportunities to capitalise on advantages such as connectivity and a skilled local workforce, whilst identifying the need for more workspace to meet demand.



- Two designated Opportunity Areas in Waterloo and Vauxhall
- Northern Line Extension due for completion in 2020 – delivering the infrastructure required for thousands of new jobs and residents in Vauxhall, Nine Elms and Battersea
- Over 20,000 jobs created since 2009
- Lambeth has launched the biggest house-building programme for a generation with a plan for 1,000 extra homes at council-level rent

Current Population	321,000
Forecast population for 2036	359,000
Number of new homes created per annum (Draft London Plan target)	1,589



Left: Lollard Street by Darling Associates
Right: Lambeth Town Hall by Cartwright Pickard for LB Lambeth
© Hundven Clements Photography



Lewisham

The historical evolution of Lewisham has led to a range of distinctive neighbourhoods served by a number of commercial centres, each with its own distinct character and community. In the north there are the pre-industrial cores of Blackheath, Deptford and Lewisham which have mixed residential neighbourhoods around them whereas the south is characterised by interwar growth such the cottage estates of Bellingham and Downham. Much of the north of the borough is covered by two Opportunity Areas which have provided much of the borough's growth in the last decade and where significant growth is still anticipated with opportunities enhanced by the proposed Bakerloo Line Extension. Many of the areas of change are centred around strong historic centres and the Council works with community groups to foster a sense of social cohesion.

KEY AREAS

Catford/Lewisham Town Centres

Catford and Lewisham are the borough's primary town centres. The Council has aspirations for Lewisham to become a Metropolitan Town Centre and for Catford to be transformed into the borough's civic hub. In Lewisham, significant new retail, employment and housing – including many homes which are genuinely affordable – will be supported with the arrival of the Bakerloo Line Extension (BLE) to Lewisham Station as well as its designation as a Strategic Interchange in the Mayor's Transport Strategy. The Catford Masterplan is underway and intends to map out how the town centre can evolve over the coming decades. Improvements to the routes between these two main centres will also serve to establish a strategic corridor that will help drive future economic growth.

New Cross and Deptford

The Council is working collaboratively with partners such as Goldsmiths and Trinity Laban to support the area's role as a leading creative and cultural hub, including a bid for the area to become a Creative Enterprise Zone. The area is undergoing significant change, notably at Convoys Wharf – the borough's largest development site – and at the Timberyard and sites along Deptford Creekside, all of which offer a mix of uses, deliver improved connections and contributions to the established creative/cultural hubs. This area continues to provide significant opportunities, which will be enhanced by the arrival of the BLE through New Cross Gate. A New Cross Gate Area Framework is being developed to understand how the benefits to the immediate and wider areas can be maximised.



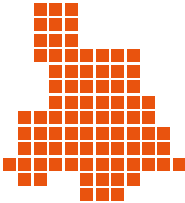
Left: The Timberyard, Deptford by Hawkins\Brown for Lendlease © Forbes Massie
Right: Lewisham Town Centre



- Key**
- Regeneration and Growth Areas
 - Green Belt / Metropolitan Open Land
 - Overground Network
 - Bakerloo Line Extension



- Third largest borough in London
- 1,668 new homes created in 2016-17
- 27 Conservation areas
- 540 listed buildings
- Over 200 locally listed buildings
- Five Neighbourhood Forums
- Two Opportunity Areas – Deptford, Lewisham and New Cross and Catford
- Commitment to the Phase 1 Bakerloo Line Extension through New Cross Gate and into Lewisham to be delivered by 2029 with station interchanges expected at both stations
- Over 170 Languages spoken in the borough
- Green space encompasses a quarter of the borough
- Two Strategic Industrial Locations (Bromley Road and Surrey Canal Road)

Current Population	298,817	
Forecast population for 2036	342,896	
Number of new homes created per annum (Draft London Plan target)	2,117	


Islington



Derwent London's White Collar Factory, Old Street Roundabout © Tim Soar

Islington comprises a range of inner London typologies, from the City fringe and Tech City in the south to the bustling Holloway Road in the north. With the highest residential density in the capital, future development opportunities lie within the intensification of existing areas such as Archway, Highbury Corner and Holloway Road.

- Highest population density of any London borough (158.4 people per hectare compared to a London average of 56.6)
- One Crossrail station at Farringdon
- Islington had the biggest reduction in housing targets by the Mayor's Draft London Plan – down 39 per cent

Current Population	235,400	
Forecast population for 2036	259,700	
Number of new homes created per annum (Draft London Plan target)	775	

Old Oak and Park Royal Development Corporation (OPDC)

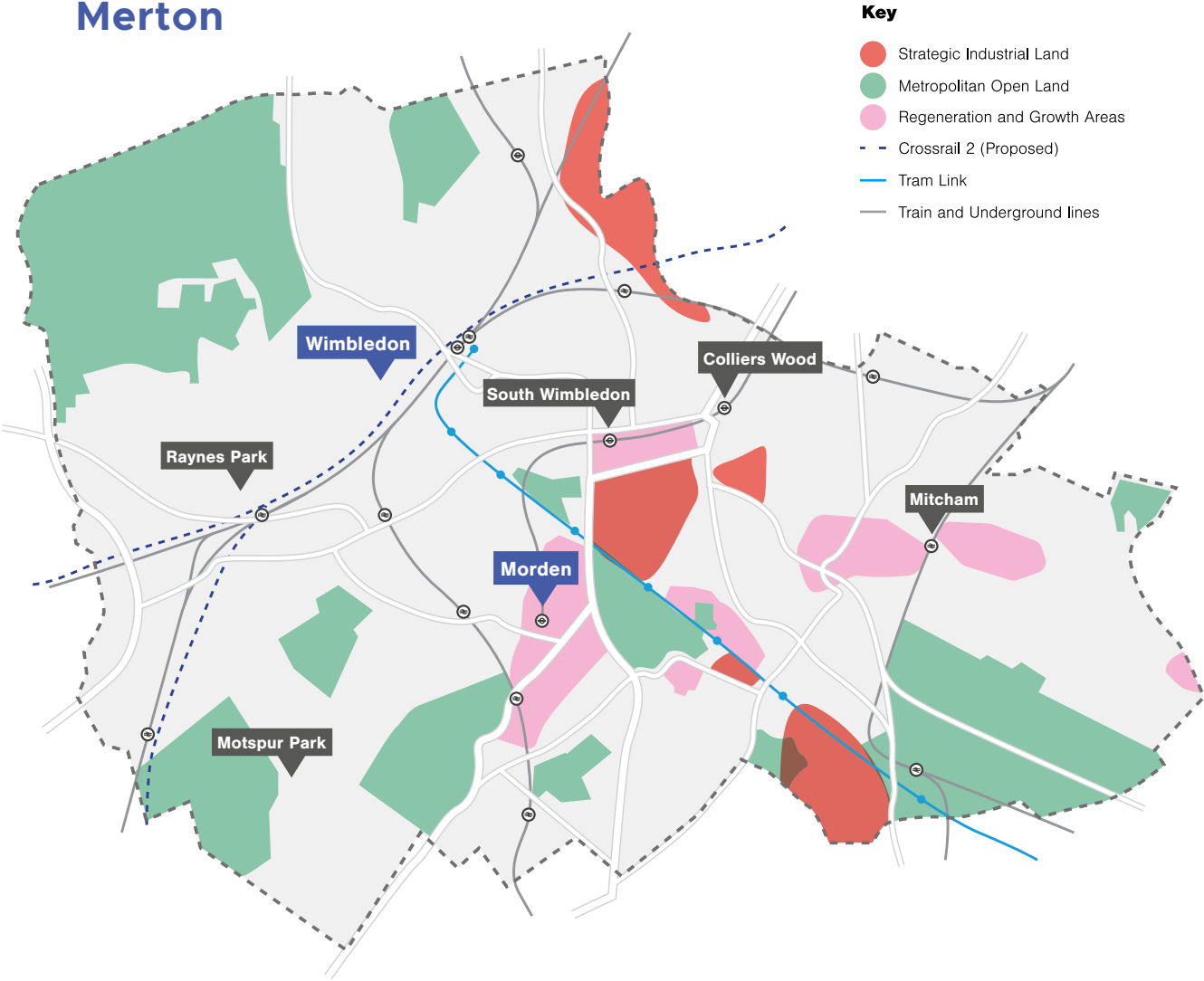
Formed from 650 hectares of fringe lands in the London Boroughs of Hammersmith and Fulham, Ealing and Brent, this mayoral planning authority is embarking on the largest development project in the UK. Composed of two parts, the scheme will create a new town at Old Oak Common with 25,000+ homes and associated infrastructure, and intensify the existing business location at Park Royal – ‘London’s bread basket’. Capitalising on strong transport links with the Elizabeth Line and HS2, the culture-led programme seeks to create a coherent neighbourhood through linking the bisected site. With multiple landowners currently, the OPDC is hoping to become a significant landowner to help drive change.

- Working with 2,000 local volunteers, together with schools and local businesses, the three year Great Place Scheme seeks to uncover, connect and showcase the culture, creativity and heritage of Park Royal to help shape the future of Old Oak
- Due to open in 2026, Old Oak Common Station will be the only place where HS2 meets Crossrail and the Great Western Main Line. The station will be the UK’s largest sub-surface station ever to be built and largest station to be built since Victorian times serving over 250,000 passengers a day



The first major scheme at OPDC – Oaklands by CZWG Architects for Notting Hill Genesis





Merton is in the heart of south London, where urban London adjoins suburban Metroland. Best known for its green spaces and tennis, nowadays the borough is in transition, with an ever-younger population, and investment in business space, schools and transport. Opportunities for growth and regeneration are concentrated along the Northern Line corridor (Colliers Wood, South Wimbledon, Morden) and to the north of the borough on the Tooting borders and north Mitcham. Merton's largest and best known town centre, Wimbledon, is a vibrant business location and is the only town centre in London accessible by train, tube, tram and bus. Tightly bound by attractive tree-lined streets and conservation areas, Wimbledon's opportunities aren't limited to a potential Crossrail 2 station; there is a strong desire to improve the streetscape, boost businesses and jobs and green the town centre through targeted investment via the FutureWimbledon masterplan.

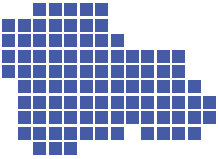
KEY AREAS

MoreMorden

Morden presents an excellent opportunity to demonstrate how the development potential of Metroland outer-London town centres that are served by an underground stations (in Zones 4-6) can be unlocked. Merton Council and TfL are collaborating on the delivery of this, which will deliver substantial public realm improvements, approximately 2,000 homes and a new commercial offer. Development is set to commence in 2021. Morden town centre has also benefitted from the Morden Retail Gateway project, for which Jan Kattein Architects was nominated for a 2018 MacEwen RIBA Journal award, and new leisure centre currently under construction.

FutureWimbledon

Following an international design competition in 2014, Merton is now preparing a masterplan to guide growth and investment decisions in Wimbledon. Over 200 community members participated in three major workshop events, producing 96 maps, casting over 2,000 votes in 16 polls, submitting hundreds of photographs and generating hundreds of ideas to kickstart the masterplan. Planning for 2030, the masterplan will highlight Wimbledon's opportunities for growth in jobs, retail and culture, reshaping Merton's civic space to reduce traffic dominance and green the town centre.

Current Population	205,000	
Forecast population for 2036	238,242	
Number of new homes created per annum (Draft London Plan target)	1,328	

- Around 90 per cent of the planning applications received are for sites delivering 10 homes or less
- Merton is the only borough with tube, train, tram and bus
- New rail station opening at Mitcham Eastfields
- Three Business Improvement Districts (LoveWimbledon, South Wimbledon Business Area and Willow Lane)
- 10-15 year regeneration of three estates in Merton: Eastfields (Mitcham), High Path (South Wimbledon) and Ravensbury (Morden)
- Merton received the largest increase to housing targets in the Mayor's Draft London Plan – up 223 per cent from 411 homes per annum

Top: Pinnacle House, Wimbledon by MATT Architecture for Aviva Investors and Kingston Estates
Bottom: Merton Town Centre proposals for LB Merton & TfL



Newham

At the heart of East London and a few miles from the City, Newham has an abundance of development land, excellent transport links and a young, energetic and increasingly skilled workforce. By 2023 at least £22 billion will have been invested in Newham, creating more than 43,000 new homes and tens of thousands of new jobs. The arrival of Crossrail will further strengthen connectivity. From the new businesses, cultural organisations and housing coming to Stratford, to the multi-billion pound regeneration of Canning Town and Custom House and the impressive investments in the Royal Docks, Newham is committed to ensuring residents benefit from new opportunities coming to the borough by focusing on employment, education, transport and a fair deal for housing.

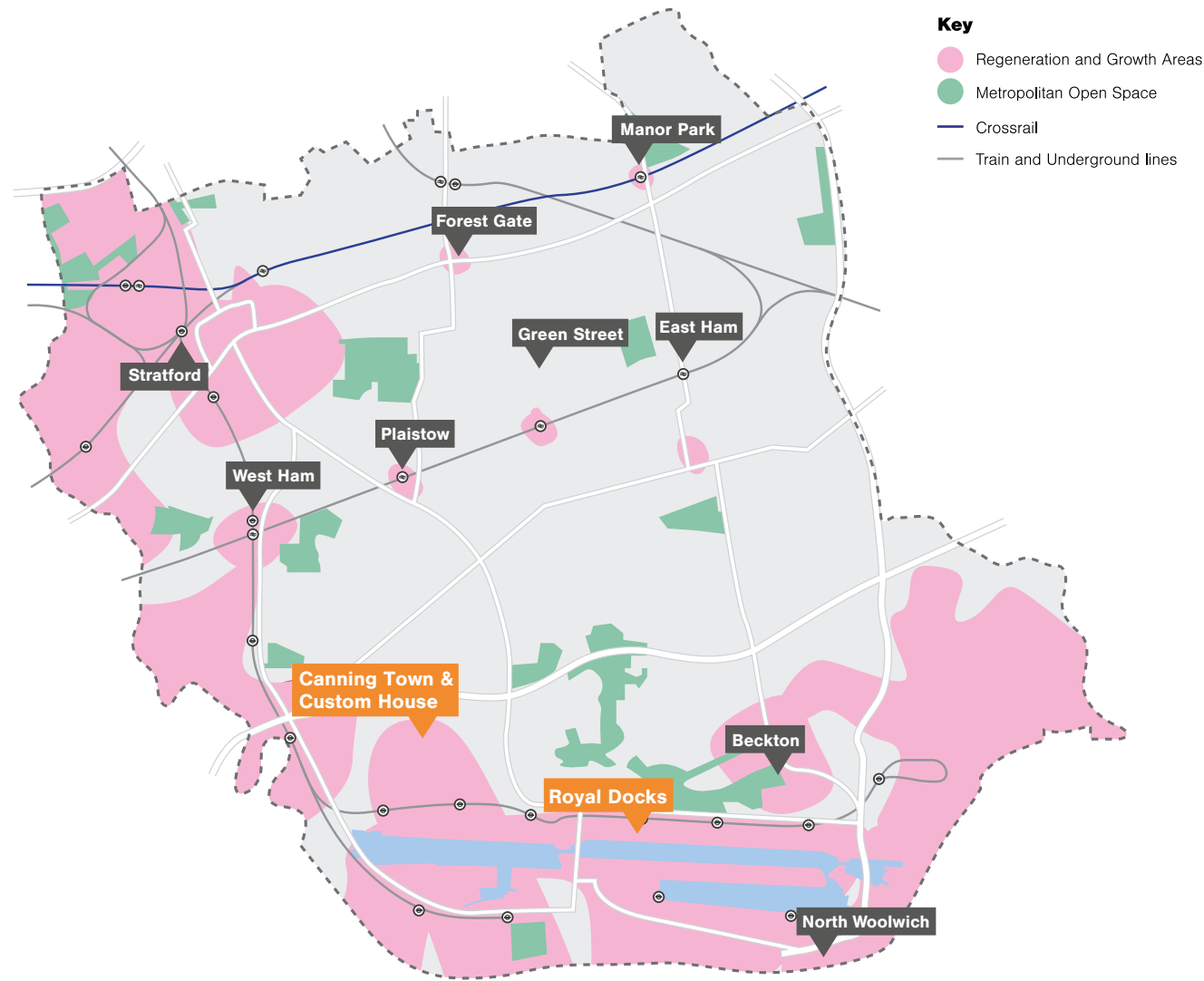
KEY AREAS

Royal Docks

This Opportunity Area seeks to become London's newest business district, with ABP creating London's next financial district alongside the £3.5 billion investment in Silvertown Quays, changing the employment profile of the borough by bringing in thousands of highly skilled jobs in an expanded business base. The Royal Docks Enterprise Zone is providing incentives to attract further investment and economic growth. The Docks offer crucial space needed for housing growth, new schools, community facilities, and transport links to other parts of Newham.

Canning Town and Custom House

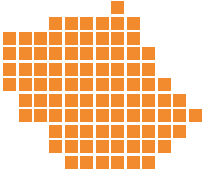
A £3.7 billion regeneration programme is well underway, including new and better homes with genuinely affordable and family housing; vibrant centres; improved community facilities and amenities; new shops, office space and workspace; and high quality open spaces. The area benefits from transport connections into the centre of London, Canary Wharf, Stratford and London City Airport and soon Custom House will have a direct and speedy Crossrail connection to central and west London.



Top: Rathbone Market by CZWG
Bottom: The Royal Docks



- Over 2,800 new homes completed in 2016/2017
- 9 conservation areas
- Five Crossrail stations, at Manor Park, Maryland, Forest Gate, Stratford, and Custom House
- Red Door Ventures (the council-owned residential developer) is building more than 15,000 housing units
- 31 large-scale strategic sites identified for housing and mixed-uses
- 2,000+ new businesses each year
- 40 per cent of wards in the 10 most deprived in England

Current Population	350,200
Forecast population for 2036	424,600
Number of new homes created per annum (Draft London Plan target)	3,850
	



Key

- Regeneration and Growth Areas
- Green Belt / Metropolitan Open Land
- Elizabeth Line (Crossrail)
- Train and Underground lines

KEY AREAS

Ilford town centre

Redbridge is an outer borough with a growing, culturally rich and well-educated community, and has recently been ranked as the happiest place to live in London. The borough is experiencing significant population growth that is expected to continue across the next fifteen years and beyond, with five key growth areas identified to deliver a range of new housing, commercial and social infrastructure. The arrival of the Elizabeth Line will enhance connectivity, accelerating and enabling growth.

Ilford is the largest Opportunity Area in Redbridge and is a designated Housing Zone, benefiting from a new Crossrail station providing enhanced access to the town centre. Guided by the Ilford Manifesto and Delivery Prospectus, the delivery of 6,000 homes and 3,000 new jobs by 2030 seeks to create a high quality place. A new Cultural Quarter is being established with support from the Mayor’s Good Growth Fund, with artist studios, a food market and workspace in and around the historic Grade II listed Town Hall building anticipated to kick-start cultural regeneration and boost the evening economy.

Crossrail Corridor

Served by three Crossrail stations, outside of Ilford, the development potential of this corridor will enable the renewal of Seven Kings, Goodmayes and Chadwell Heath to provide a range of new developments. The Redbridge Local Plan sets a strong growth potential within this area, with a number of sites identified to deliver approximately 4,700 new homes and 2,000 new jobs in business, community uses and professional services.

Current Population	297,000	
Forecast population for 2036	362,000	
Number of new homes created per annum (Draft London Plan target)	1,979	

- Deliver an estimated 16,845 new homes by 2030
- Four Crossrail stations, at Ilford, Seven Kings, Goodmayes and Chadwell Heath
- Hainault Business Park and Southend Road Business Areas are identified by the Mayor as Strategic Industrial Locations



Top: NU Living’s housing development close to Crossrail stations
Bottom: Vision for the Cultural Quarter in Ilford Town Centre by Allies and Morrison



Richmond upon Thames

Home to a number of historic neighbourhoods, this largely suburban borough has seen the second largest growth of any borough over the last 25 years – second only to Tower Hamlets – despite over half of its area being designated as green space. There are still many opportunities to densify the relatively low population of the borough, with new proposals concentrated around Twickenham and the redevelopment of the 22-acre Stag Brewery site in Mortlake. The borough has recently joined forces with Wandsworth Council through the creation of a single shared staffing structure.

- London's only borough spanning both side of the Thames, with 21 miles of riverfront
- One of the country's highest densities of employment in tech
- Over half of the borough's land is designated as green space

Current Population	198,000
Forecast population for 2036	220,400
Number of new homes created per annum (Draft London Plan target)	811

Twickenham Station by MAA Architects for Access Self Storage



Southwark

A large part of Southwark is located in Central London, providing the opportunity for the innovative development of spaces to provide new homes, jobs, schools, shops and places to work. Development is being built rapidly, with most of the change taking place in the north and centre of Southwark, predominantly in Elephant and Castle, Canada Water, East Walworth, Blackfriars Road, Bankside and along the River Thames. Change is also beginning to happen in Old Kent Road, the borough's largest regeneration area. Southwark has an ambitious target to deliver 11,000 new council homes by 2043 – through new developments, as well as through estate infill and regeneration – with the first 1,600 complete or underway by the end of 2018.

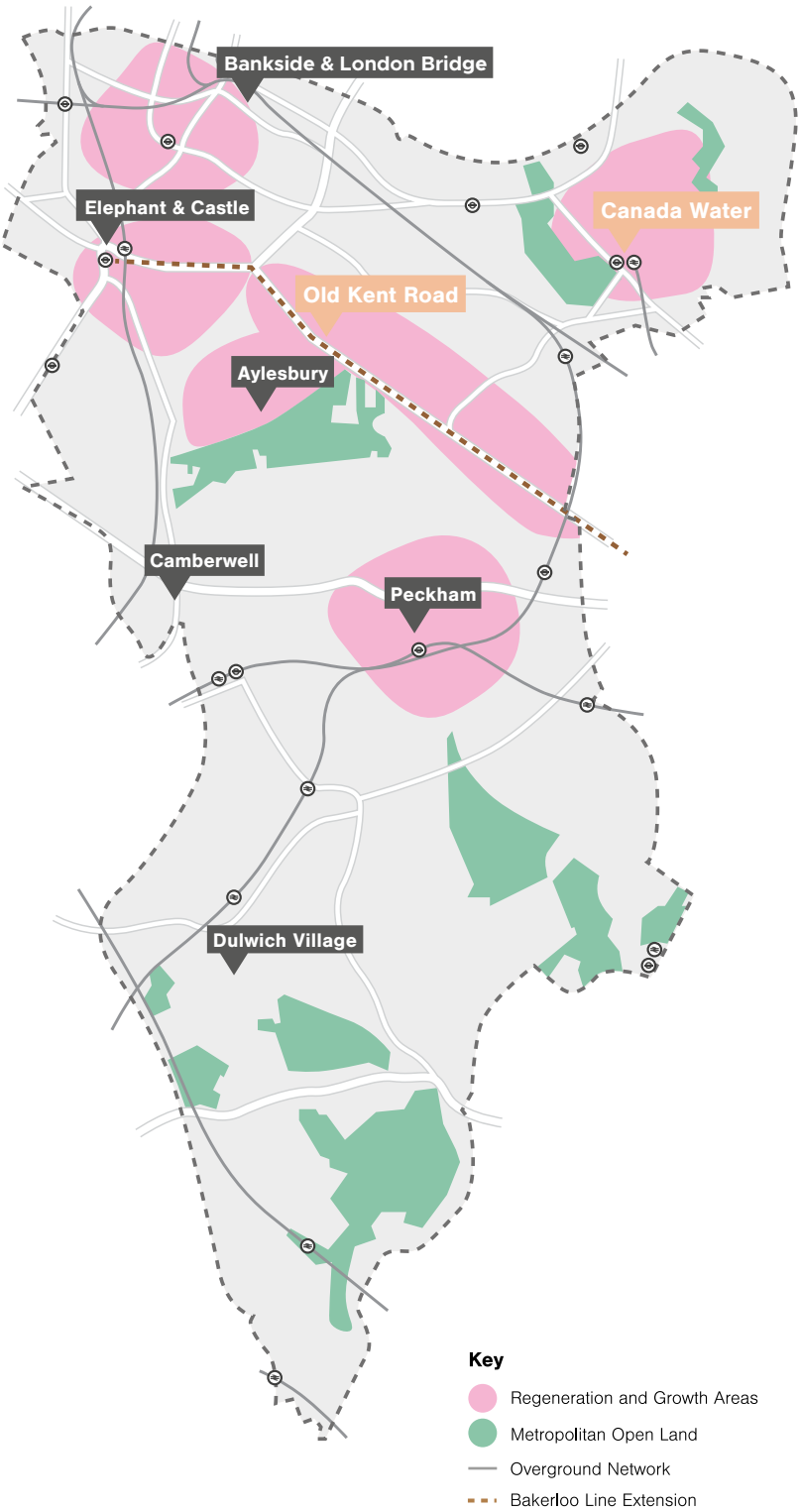
KEY AREAS

Old Kent Road

Old Kent Road isn't any old road – for 2,000 years it has been a vital artery connecting London to Europe. With the construction of the Bakerloo Line Extension driving the growth of central London southwards, this Opportunity Area will see 20,000 new homes, 10,000 additional jobs and new town centres delivered, with redevelopment benefiting the existing communities in Walworth, Bermondsey and Peckham through new and improved housing, schools, park spaces and leisure and health centres and the creation of a wide range of jobs. To achieve this, development will look to innovatively mix residential and industrial uses in a way that has not been seen before in London.

Canada Water

The Rotherhithe peninsula was transformed during the 1980s and 1990s, with over 5,500 new homes built along with a shopping centre and the Harmsworth Quays Printworks. A second phase of regeneration is now underway in the area focused around Canada Water, transforming the area into a town centre. The redevelopment will combine shopping, civic, education, leisure, business and residential uses to create a new heart for Rotherhithe. Canada Water's role as a shopping destination with a high street feel will be strengthened as well as providing new homes.



Current Population	330,000	
Forecast population for 2036	408,000	
Number of new homes created per annum (Draft London Plan target)	2,554	

Top: Canada Water
Bottom: Rich Estate, Old Kent Road by AHMM for London Square

- 2,409 new homes were completed in 2016/17, including 552 affordable homes of which 412 are let at social rents
- 47,000 new office jobs will be created over the next 20 years
- The Bakerloo Line Extension will provide 65,000 extra journeys in the morning and evening peak
- Other transport projects to be delivered include the Southwark Spine cycle route, Low Line walking routes along railway viaducts, a foot and cycle bridge from Rotherhithe to Canary Wharf and opening a rail station in Camberwell
- Protected open space makes up over 21 per cent of Southwark including woodland, parks, community farms and sports pitches



Sutton

Positioned between Heathrow and Gatwick airports, and less than 30 minutes away from central London by rail, Sutton can help create the opportunities that will protect and advance London’s competitiveness within global markets. A 15-year vision to unlock development opportunities seeks to drive prosperity, provide jobs and create the 21st century smart living solutions London needs. The Council’s development company Sutton Living Limited will deliver housing, supported by the Sutton Decentralised Energy Network which will provide low carbon energy benefiting developers as well as residents and businesses.

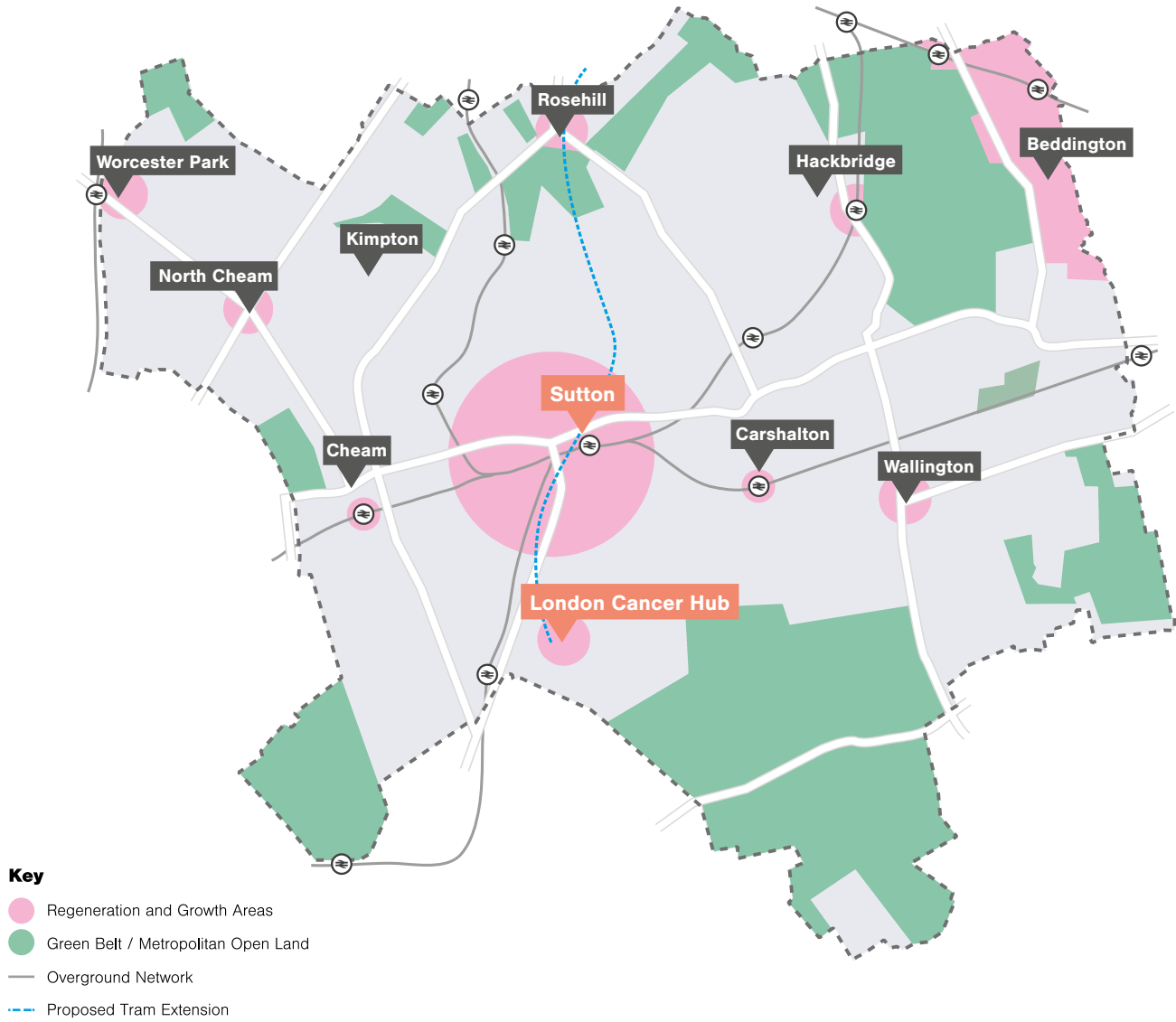
KEY AREAS

Sutton Town Centre

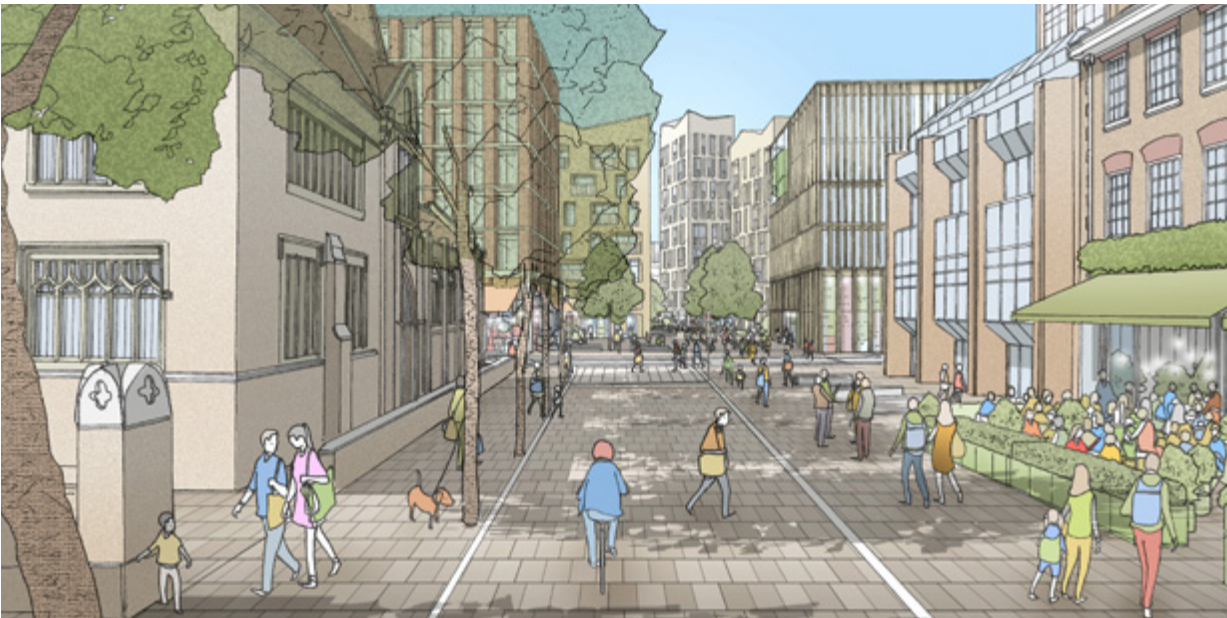
Revitalising the town centre, the Council is committed to delivering regeneration which combines smart city aspirations, being the first Heritage Action Zone in London to create a step change in the environment for people to work, rest and play. Identifying key sites for redevelopment, a masterplan led by Allies and Morrison and GVA has been embedded into the vision and development principles through the Local Plan and Site Allocations, providing increased certainty for future investments – including the delivery of 3,400 new homes, 31,000 sqm of retail floorspace and 23,000 sqm of new office floorspace by 2031.

London Cancer Hub

Seeking to create the world’s leading life science district specialising in cancer research and treatment, the London Cancer Hub – a partnership between the Council, The Institute of Cancer Research and The Royal Marsden NHS Foundation Trust – will house the world’s top cancer researchers, clinicians, pharmaceutical companies and related innovative enterprises. The 265,000 sqm site will provide up to 7,000 life science and support jobs and a further 6,000 construction jobs creating significant local, regional and national economic growth, contributing £1.2 billion each year to the UK economy.



Top: London Cancer Hub by Haptic Architects and Nordic
Bottom: Vision for the Town Centre by Allies and Morrison

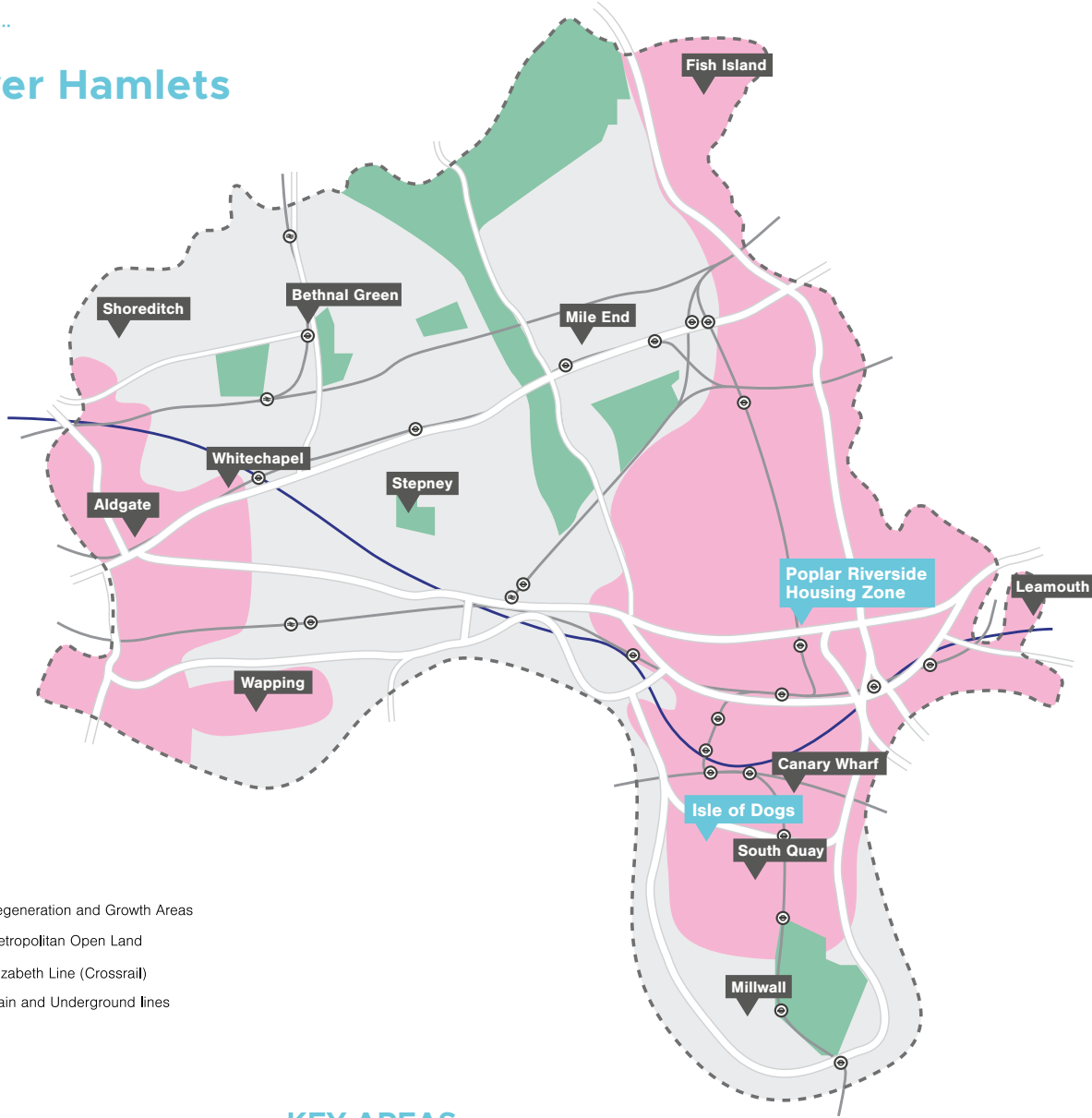


Current Population	208,100
Forecast population for 2036	247,700
Number of new homes created per annum (Draft London Plan target)	939

- 1,500 acres of open space
- Third highest local authority in the UK for the speed of house sales
- Three Business Improvement Districts



Top: Isle of Dogs
Bottom: EcoWorld Ballymore's London City Island



KEY AREAS

Tower Hamlets is one of the smallest but most densely populated boroughs in London, with over 300,000 inhabitants covering less than 8 square miles. In the past 10 years, its population has grown faster than anywhere else in the country and this is set to continue, with a projected 16 per cent increase in its population over the next decade. As the centre of London continues to expand eastwards, Tower Hamlets is well placed to capitalise on its role as an engine of London's growth, with the tech cluster in the City Fringe, a new medical research cluster in Whitechapel and the leading financial centre at Canary Wharf.

Isle of Dogs

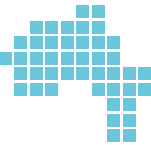
Identified as an Opportunity Area, the Isle of Dogs is currently experiencing rapid growth and intense development pressure primarily from high density housing schemes. The area includes the Canary Wharf Activity Area and is expected to deliver a significant level of employment through its partial designation as a Preferred Office Location as well as critical infrastructure such as transport, schools and shopping facilities through site allocations such as Westferry Printworks; Crossharbour District Centre and the delivery of the Crossrail Station.

Poplar Riverside Housing Zone

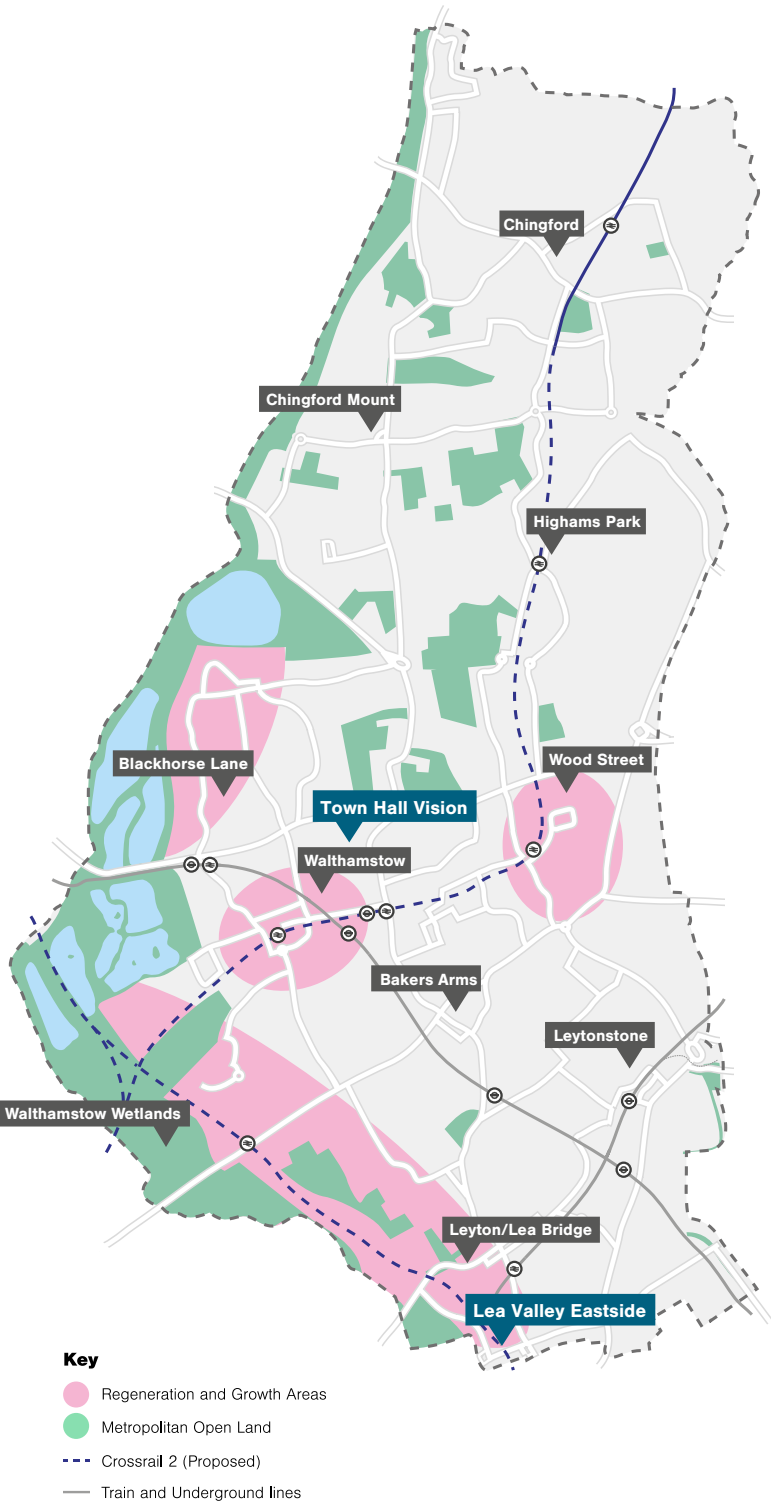
The Housing Zone lies within the Lower Lea Valley Opportunity Area, with the majority of sites occupying former industrial lands nearby or bound by the A12, A13 and River Lea. Over 15,000 homes are likely to be built in Poplar Riverside over the next 10 to 15 years, with the majority scheduled for delivery by the early 2020s. The intention is to signal Poplar Riverside as a new affordable district to both live and work. Utilising the rich asset of the River Lea will be crucial to the regeneration of the area, as well as the delivery of key infrastructure to significantly improve connectivity across the A12, A13 and River Lea to create a network of walking and cycling routes and open up Poplar Riverside to the rest of the borough.

- 58 Conservation Areas and over 2,000 Listed buildings
- Biggest number of tall towers proposed of any London borough
- The Draft London Plan has reduced the housing target from 3,931 (the highest in London) to 3,511 (the second highest in London)
- The borough was the fastest growing local authority in England and Wales from 2006 to 2016
- Largest population of young people in inner London
- Two thirds of the borough's population come from a minority ethnic background
- Two new Crossrail stations, at Whitechapel and Canary Wharf
- One Housing Zone at Poplar Riverside
- Three Opportunity Areas, at City Fringe, Lower Lea Valley and Isle of Dogs and South Poplar
- Estimated number of jobs will increase by 44 per cent, from 285,000 in 2015 to 410,000 in 2031
- As of 2016/17 there was a total of 0.89ha open space per 1,000 residents in the borough (against a standard of 1.2ha per 1,000 residents)
- The borough is lobbying for Crossrail 2 to connect at Hackney Wick

Current Population	317,203
Forecast population for 2036	395,348
Number of new homes created per annum (Draft London Plan target)	3,511



Waltham Forest



Waltham Forest is one of the fastest growing parts of London, with four key areas identified as having excellent potential to deliver growth – Walthamstow, Wood Street, Blackhorse Lane and Lea Valley Eastside (in the Leyton and Lea Bridge area). 81 potential development sites over 0.25 hectares have been identified by the GLA Strategic Housing Land Availability Assessment. As London’s first Borough of Culture, arts and culture will be at the heart of growth plans and decision-making to create a cultural legacy beyond 2019.

KEY AREAS

Lea Valley Eastside

Equivalent in size to the City of London, the vision for this new district is to retain and expand the existing business and employment uses alongside residential opportunities in mixed-use developments. This will create new neighbourhoods and a new town centre, with 300,000 sqm of improved and intensified business, retail, leisure, health, culture and community spaces, and c.4,000 new homes. London’s newest railway station, Lea Bridge, will act as a catalyst for growth, with future plans for a potential second National Rail station within the area, complemented by Leyton Underground Station.

Town Hall Vision

The Town Hall vision is an ambitious project, key to the further regeneration of Waltham Forest. Preserving the Grade II listed Town Hall and Assembly Hall, this key regeneration project will deliver new homes and open up the campus grounds for public use. Plans include closing nine older, less efficient Council buildings in the borough and releasing the Council-owned land for housing. Currently in consultation, this vision has the potential to save between £500,000 – £1 million of taxpayers money, making it cost-neutral by enabling better use of publicly-owned land and buildings in the borough under the One Public Estate initiative.



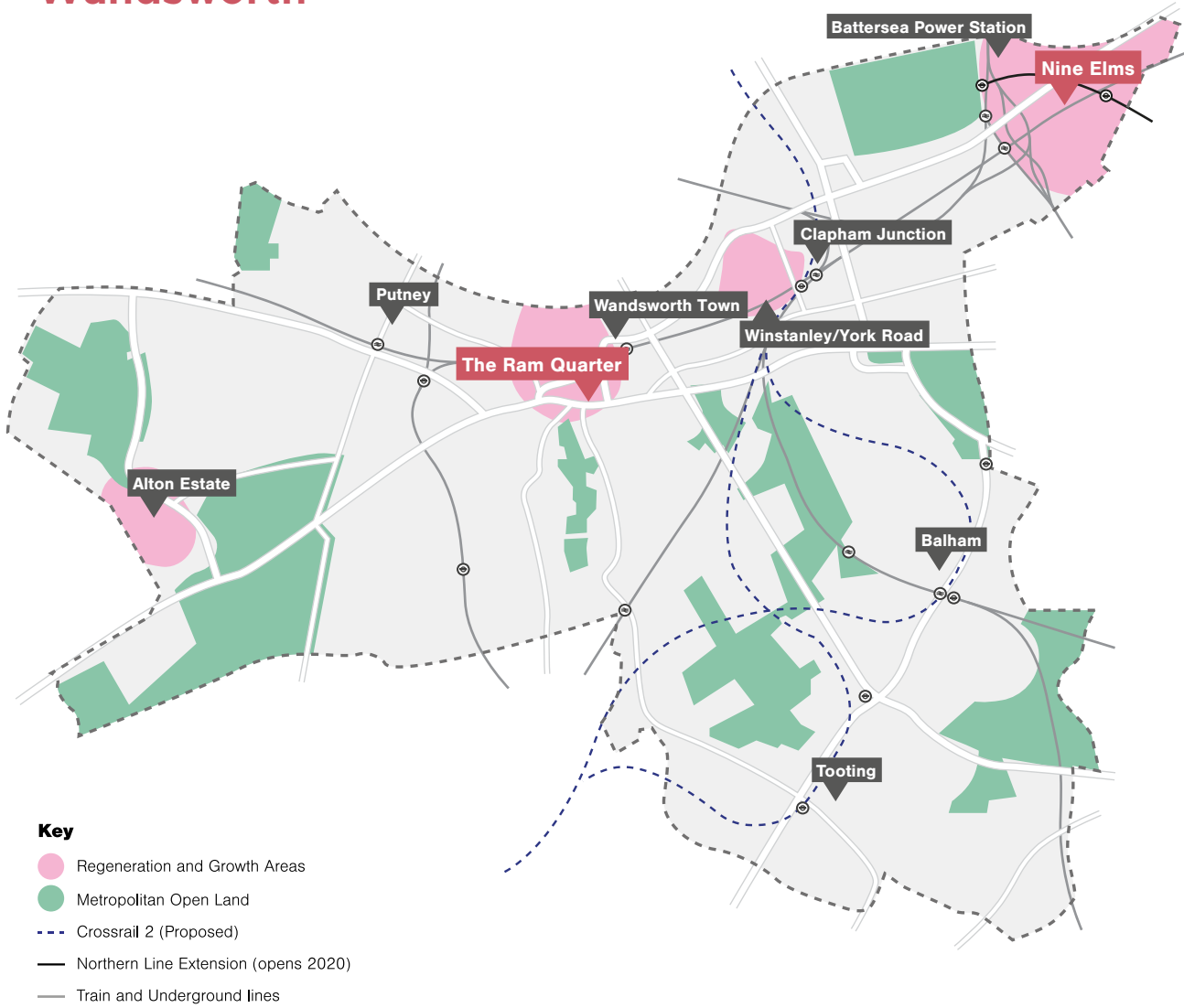
Top: Town Hall campus vision
Bottom: Walthamstow Wetlands by Witherford Watson Mann and Kinnear for LB Waltham Forest, Thames Water and London Wildlife Trust



- 14 Conservation areas
- One Housing Zone
- Opportunity Areas within the Olympic Legacy boundary and the Upper Lea Valley
- London’s first Borough of Culture
- One of the youngest boroughs in London (median age of 34 years against a UK average of 40 years)
- Delivered an average of 47 per cent affordable new homes between 2013 to 2016, the highest in London
- Set to deliver 17,000 new homes in the next 10 years
- One of the fastest growing business economy in London at 9 per cent
- The greenest borough north of the Thames

Current Population	271,200
Forecast population for 2036	317,334
Number of new homes created per annum (Draft London Plan target)	1,794

Wandsworth



- Key**
- Regeneration and Growth Areas
 - Metropolitan Open Land
 - Crossrail 2 (Proposed)
 - Northern Line Extension (opens 2020)
 - Train and Underground lines

KEY AREAS

Nine Elms

Well connected by tube, rail, bus and river, Wandsworth is attracting billions of pounds of new investment which is transforming former industrial areas such as Nine Elms and reinventing the borough's five major town centres. The Council is one of the biggest social landlords in London, responsible for 34,000 homes, and is investing in both refurbishment and new build, including two major estate regeneration programmes in Battersea and Roehampton – helping Wandsworth to be one of the biggest contributors of new housing of all kinds in London.

Nine Elms is home to one of the largest regeneration projects in Europe and the most significant development area in central London. Since the agreement of the Opportunity Area Framework in 2011, it has rapidly developed as a new central London district with the opening of the new US Embassy and regeneration of New Covent Garden Market and Battersea Power Station. An area-wide infrastructure programme funded by development is supporting the creation of 20,000 new homes and 25,000 new jobs. Development has also delivered a new riverboat pier which will be followed by two new Northern Line Tube stations in 2020. Apple will locate their UK headquarters to the area in 2021.

The Ram Quarter

Located in the heart of Wandsworth Town on the site of the Old Young's Brewery – Britain's oldest site of continuous brewin – this mixed-use development will offer over 650 homes and new shops, cafés, bars and restaurants across 7.7 acres, with the newly accessible River Wandle flowing through the scheme. The scheme will comprise a mix of new build and sympathetic conversion of the heritage brewery buildings. The development will also feature a brewery museum and a micro-brewery on site. Together with the proposed removal of the Wandsworth Gyratory, this and other investment will transform the town centre.

Current Population	324,400	
Forecast population for 2036	393,046	
Number of new homes created per annum (Draft London Plan target)	2,310	



- Wandsworth had the highest number of net housing completions of all London boroughs in 2015-16
- Clapham Junction is the busiest rail junction in Europe and the busiest UK station for interchanges between services
- New Covent Garden Market supplies 40 per cent of London's fresh fruit and veg eaten outside the home and 75 per cent of London's florists
- Tooting was named one of the top ten coolest neighbourhoods in the world by Lonely Planet in 2017
- 45 conservation areas

Top: Ram Quarter by EPR for Greenland Group
Bottom: Battersea and Nine Elms



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Map showing the political control of London’s boroughs, July 2018 © London Communications Agency and London Councils

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Map showing London's Local Development Companies overview, information from Centre for London’s Borough Builders: delivering more housing across London by Victoria Pinoncely and Mario Washington-Ihieme © Centre for London, July 2018

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Future rail improvements and areas of growth, simplified version of the growth opportunities and transport links map, 2017 (GLA)

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Borough Survey conducted by NLA with participating London local authorities between August-October 2018

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Town Centre Survey conducted by NLA for London’s Towns: Shaping the polycentric city. Data collected online and in person between October-December 2017

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Summary of average monthly rents in private rental market, recorded per 12 month rolling period. December 2017 © Valuation Office Agency. Available from: <https://www.gov.uk/government/collections/private-rental-market-statistics>

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Median average house prices by London borough. Using information from DCLG and Land Registry, August 2018 © Crown Copyright. Available from: <https://data.gov.uk/dataset/land-registry-monthlyprice-paid-data> August

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Comparison of housing targets specified in the London Plan, from the previous Mayor’s iteration to today. London Plan documents, March 2015 and December 2017 (GLA)

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Data from the London Tall Buildings Survey 2018, April 2018 (NLA)

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Land area and population density, using GLA 2016-based population projections (housing-led model) and Office for National Statistics Midyear Estimates. March 2018 © Crown Copyright. Available from: <http://data.london.gov.uk/dataset/gla-population-projections-custom-age-tables>

This report utilises information researched and supplied to NLA which is to the best of our knowledge accurate at the time of publication (November 2018).

Programme Champions

Countryside

Countryside works in partnership with public and private sector organisations to regenerate housing estates and brownfield land into high quality mixed-use and mixed-tenure schemes.

Our projects are developed with local authorities and we support local workforce, cultural, education and local community initiatives. We have undertaken more than 45 estate regeneration schemes since the 1980s and we have been building new homes in London and the South East since 1958.

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Notting Hill Genesis

Notting Hill Genesis (NHG) provides homes for around 170,000 people in approximately 64,000 properties across London, the home counties and East Anglia. We work at the heart of our communities, building relationships with residents that go beyond bricks and mortar. We strive to be the best and are committed to working with our residents to ensure that everyone has a safe, secure and good quality home, and access to high standard services delivered in the way that suits them best.

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Programme Supporters

Child Graddon Lewis

Child Graddon Lewis is an architectural and design practice based in Spitalfields, East London, working predominantly in London and the outer boroughs, with major projects in Leeds and Manchester. With over 60 talented members of staff and 26 years of experience, people are at the heart of everything we do - from the workplace through to our projects, whether it's a small local school or a world-leading brand. Our award-winning housing designs have gained media attention and we're proud to hold positions on the AJ100 and Building Top 150 Consultants.

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Clarion Housing Group

The Merton Regeneration Project involves a £1bn investment in three neighbourhoods in Merton; High Path, Eastfields and Ravensbury. Clarion Housing Group is planning to build 2,800 well-designed, energy-efficient homes over the next 12 years by replacing 1,000 existing homes across the three neighbourhoods and building an additional 1,800. This is the first major estate-based regeneration project being undertaken in Merton by Clarion, the UK's largest housing association, following the merger of Affinity Sutton and Circle Housing.

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Morden,
London, SM4 5PQ

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MICA

MICA is an award winning architectural practice formed by Gavin Miller and Stuart Cade, the partners of Rick Mather Architects. Building upon the reputation of design quality established by the partners over 20 years, MICA is a young practice with a rich heritage. The team works across multiple sectors at a range of scales while maintaining the same attention to detail throughout. An analytical approach is applied to all projects, from strategic masterplans and landscape planning to individual buildings, conservation architecture, interiors and even furniture. Through creative problem solving, engaging with stakeholders and the local community, MICA is able to solve complex problems and present solutions that appear simple in their elegance.

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NLA is London's independent centre for debate, discussion and information about the future shape of the capital with a membership representing all those with a role to play in London's built environment.

Our year-round programme of high-quality events, exhibitions and research brings together all those with a stake in London's built fabric – professionals, politicians and the public – and provides a platform for our broad network to share knowledge, make connections, challenge thinking, inform decision-making and promote positive physical change.

We're London's greatest advocates, sharing our passion and knowledge about the capital and working tirelessly – and often collaboratively – to deliver to the highest quality. The breadth of our network and the extent of our reach means we can respond quickly to the needs of the built environment professions and the city as they evolve.

We're based at The Building Centre in central London with public galleries housing our giant scale model showing the future of the capital. We bring people and ideas together to help shape a better city and allow voices to be heard.

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