

# LONDON TALL BUILDINGS SURVEY 2021

This NLA Research Paper was published by New London Architecture (NLA) in April 2021. It is an annual publication, developed with research partner Knight Frank, delivering up-to-date figures and analysis of the London tall buildings pipeline and is part of the year-round NLA Tall Buildings programme, bringing together industry experts and the public to discuss one of the capital's most debated topics.

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CONTENTS

4      Foreword →

6      Executive summary →

8      A new landscape for tall buildings? →

22     Pipeline analysis →

43     Residents' survey →

57     Viewpoints →

65     Showcase →

107    Index →

# FOREWORD

By Peter Murray, Curator-in-chief, New London Architecture

Like many things at the moment, tall buildings in London face an uncertain future. While this year's figures are remarkably robust in the light of the pandemic, there are a number of changes afoot that are likely to have an impact on their delivery in the years to come.

The outlook for new office buildings in the City of London is remarkably positive at the moment despite the likely increase in home working. This optimism is buoyed by a long term shortage of supply as well as a 'flight to quality' by occupiers who wish to encourage staff to return to work in the office. Only time will tell how much reduction there will be in the demand for space as a result of changing post-COVID work patterns, but anyone building a tall building is pretty resilient and in it for the long game. The complexity of design, planning and construction means the delivery process spans economic cycles with, as our survey shows, an average of eight years from planning to completion. However, there remains uncertainty over the City's position as a global business hub as a result of Brexit and the rebalancing of the UK economy.

In this report, Gwyn Richards, who leads the planning department at the City of London Corporation, discusses how busy his department is with tall building applications.

At 90 per cent of the total, residential buildings constitute the majority of tall buildings in this survey.

The new London Plan with its greater powers for local authorities on decisions around location and scale—as well as the definition of 'tall', will have a significant impact on the future shaping of the capital; as will future changes to the planning system. Local and national policies on characterisation are likely to affect tall buildings more than other typologies as will Robert Jenrick's enthusiasm for gentle density.

The draft National Design Code on which local codes will be based under the new planning legislation contains illustrations that suggest tall buildings are only appropriate in city centres. However boroughs also have to take into account the numbers of homes they have to deliver and while gentle density can deliver similar numbers of units on large sites, on complex urban sites tall buildings can be more efficient. Equally, if the Mayor is to successfully deliver the 15-minute city for all Londoners, tall buildings will surely be an important part of the mix.

These greater powers for local authorities combined with the increasing digitisation of planning mean that it is even more important that pan-London 3D computer modelling is used to assess the impact of tall buildings visually as well as in terms of wind, daylight and sunlight and people movement. The NLA has been banging on about the importance of this ever since our first survey was carried out in 2014. So we were very pleased to read in the new



London Plan that the Mayor will work with boroughs to provide a strategic overview of tall building locations across London and will seek to “utilise 3D virtual reality digital modelling to help identify these areas, assess tall building proposals and aid public consultation and engagement.” There is little available information at the moment as to how and when this will be in operation but hopefully, it will be before the new mayor who will be elected in 2024 has to start work on a new version of the London Plan.

Such virtual models give us a picture of the changing face of the capital and the impact that the 587 tall building revealed in this year’s pipeline will have. Whatever the impact of the pandemic or of the London Plan on future tall building proposals, there is enough in the pipeline to last us for at least a decade. While some will fall by the wayside, and new projects will emerge, this document provides a good illustration of what the London skyline will be like in 2030.



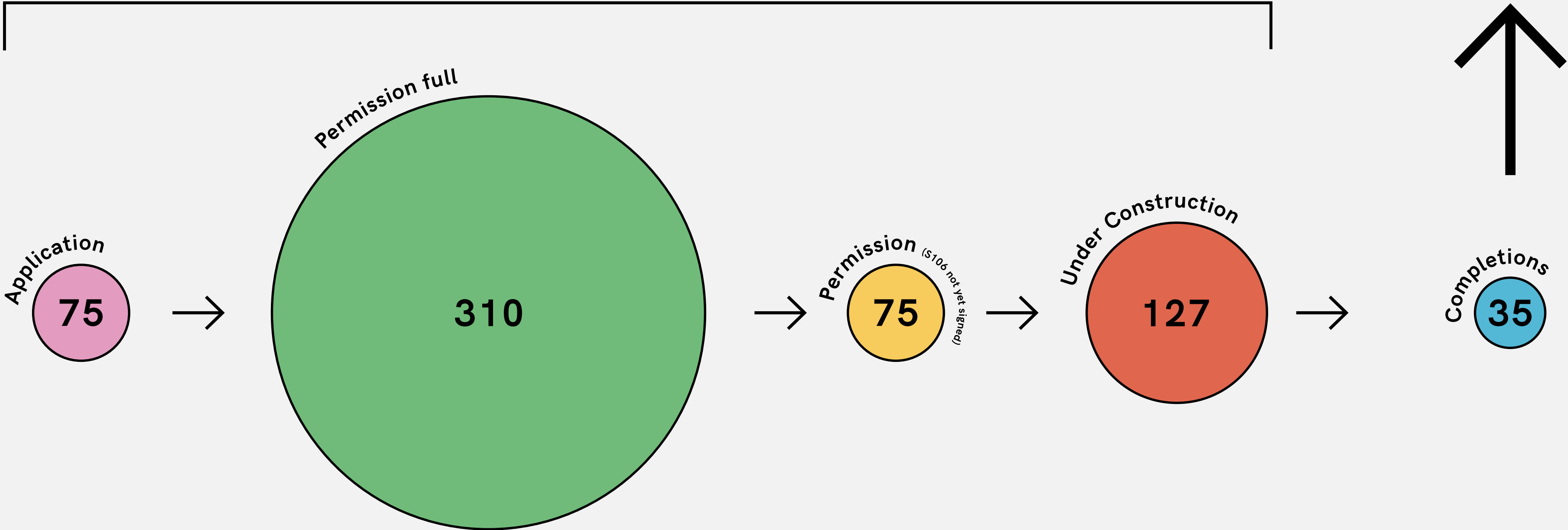
EXECUTIVE SUMMARY

587

Tall buildings in the pipeline, up 7.9% from 544 in 2019

35

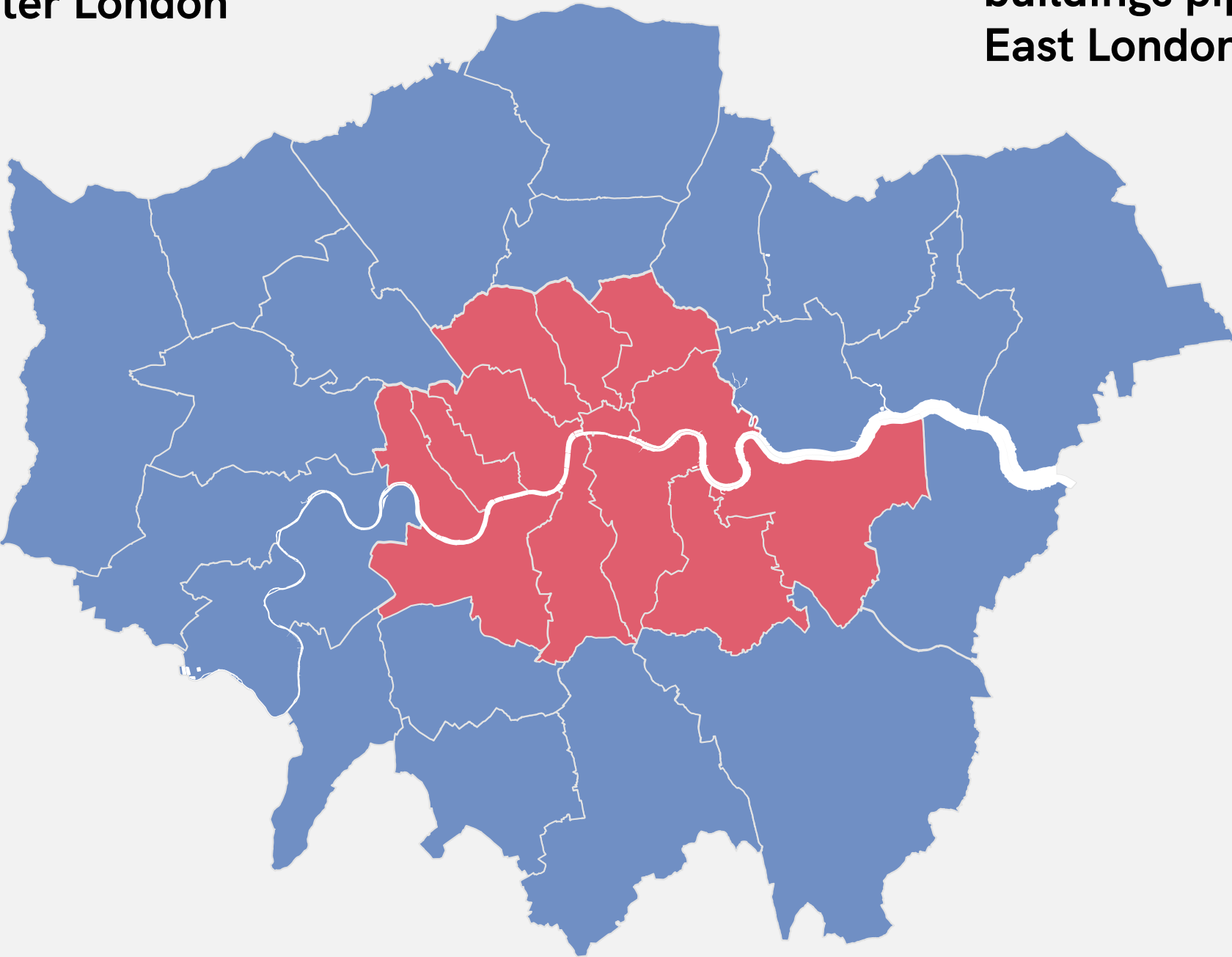
Tall buildings completed in 2020



EXECUTIVE SUMMARY

37%

of the total pipeline is in  
Outer London



44.5%

of the entire tall  
buildings pipeline is in  
East London

48%

of the tall buildings in the pipeline are  
located close to transport links



91,578

new homes could be  
provided by the tall  
buildings in the pipeline

