Annual Update | March 2016

London Tall Buildings Survey

#NLATallBuildings
New London Architecture is an independent forum for discussion, debate and information about architecture, planning, development and construction in the capital. Our core mission is to bring people together to shape a better city.
This survey provides a snapshot of the changing shape and scale of 21st century London. The pipeline of tall buildings continues to grow, although their listing here is no guarantee that they will all be built. A softening of the top end of the housing market, a resurgence in demand for commercial property, and the uncertainties surrounding the EU referendum all complicate the forecasting of completion dates for this current crop of tall buildings. It will be a couple of decades before we see their full impact. Towers take longer to build than lower buildings and they are impossible to phase; following the financial crash of 2007-8, a number of tall buildings were put on ice thus extending their delivery time – The Leadenhall Building took some 14 years from design to completion, and 20 Fenchurch Street took over a decade. The developer of the Greenwich Peninsula, where some 32 towers are proposed, is looking at a 20-year phased programme.

The clusters of towers in the Opportunity Areas of the London Plan are taking shape – in the east, in Tower Hamlets and Greenwich, the clusters are larger and the population more dense. This change of scale is inevitable as the capital faces up to the challenges of its burgeoning population within the constraints of the Green Belt and the lack of a wider planning strategy.

Yet we still need to improve the quality of planning information so we can better assess the benefits and problems of towers as groups of buildings rather than individual icons and to clarify their group impact on the city in advance. The Corporation of London is using a 3D-computer model to shape the City cluster in a much more effective way than was previously possible. The whole of the capital needs these tools – which can be used by architects, planners and communities alike. It is something the NLA has been pressing for since our first Survey and which the next Mayor will surely need if he is to make properly informed decisions on the future shape of the capital.

Contemporary tall buildings are an efficient use of land that can provide high quality homes, a range of uses and very significant wider planning benefits. Well-designed tall buildings, in the right location, should be a really positive addition to London as a global city.

This Survey provides a valuable insight into what is actually happening in terms of proposals for tall buildings in London. Taking into account the total estimated pipeline of tall buildings, it is clear that the majority are located within key clusters around London, mainly within the Opportunity Areas that have been identified by the Mayor as locations capable of making a significant contribution to London’s needs for new homes and jobs.

One of the most striking findings is that whilst the overall numbers of proposals for tall buildings has increased, the level of construction activity remains relatively consistent. We think that this is likely to be due to the significant development and investment risk required to commit to construct tall buildings. We also noted that there is evidence of efficiency in the planning system with 43 applications for tall buildings gaining planning permission having been submitted within the same year – albeit the majority of these were in one very large scheme. We do think that this points to the benefit of a clear strategic approach for the location of tall buildings that have been established by the London Plan and other planning policies.

Overall, it is clear that delivery is a long way behind the potential pipeline, and the planning system needs to continue to ensure any scheme that comes forward is carefully designed with architecture of the highest quality.
Analysis of data
GL Hearn

Since 2014, GL Hearn (part of Capita Real Estate) have worked with New London Architecture (NLA) to provide an annual snapshot of activity for tall buildings (20 storeys or greater) in London. The review covered relevant buildings that were referred to the Greater London Authority (GLA), and schemes that were in the public arena pre-planning or known to be under construction from market knowledge.

The conclusion of last year's London Tall Buildings Survey (2015) was that approximately 263 tall buildings were identified to be in the pipeline across the capital from a review of planning activity over the last two years (taking account of any known schemes being prepared for planning, submitted over the last two years, approved, or under construction).

This year, the London Tall Buildings Survey has continued to evolve, and EGi/London Residential Research (EGi) has joined as a data partner. This has meant that the Survey can now draw on the EGi’s extensive database to expand and refine the scope of the Survey, including historical data from before the London Tall Buildings Survey began in 2014.

As a result, the London Tall Buildings Survey 2016 provides a more comprehensive account of the latest position regarding tall buildings across London. Whilst the overall figure of tall buildings has not increased dramatically in terms of the number of buildings currently being constructed, the total number of projects that is included within the report is more extensive.

This report now includes historical planning applications for tall buildings which have permission but have not yet been implemented over the last five years (for the purpose of this report it is considered that any planning permissions obtained longer than five years ago and with no further activity should be considered as historic and removed from this report), as well as an update on planning applications from previous years and any new schemes entering the planning system this year.