London Tall Buildings Survey

Foreword

Peter Murray, Chairman, New London Architecture

Each year the NLA London Tall Buildings Survey has generated a healthy debate about the benefits, as well as the negative impacts, of tall buildings. It has given a voice to those that propose them as well as those that are more critical. At NLA we remain of the view that in a growing city, well designed tall buildings in the right place are appropriate, a view reiterated by the Mayor of London at his Question Time on March 23.

This year’s data will assist the Mayor as he prepares his new London Plan, with drafts expected this autumn. We are encouraged that the Mayor is now actively pursuing the idea of a 3D computer model of London, something we have been pressing for since our first survey in 2014. Developers will be able to place virtual images of their buildings into the wider model so that planners, the public and the Mayor can fully understand their impact. All too often the debate takes place without a clear understanding of the individual and the cumulative impact of proposed tall buildings. The City of London has been using such a model for the past year to great effect.

The French technology company Dassault Systems will launch the Virtual Singapore project later this year which will show what the future city will look like, as well as containing comprehensive data about the city’s management. It is high time that London became smarter and used modern digital technologies to deliver a better planning service and help shape a better city.

James Cook, Head of Residential Planning, GL Hearn

Tall buildings remain a critical part of London’s remarkable ongoing development and for many, both within and outside of the development industry, represent the most telling visual manifestation of the contemporary chapter in London’s growth. The interest in tall buildings over the year since our last report has not waned.

Over the course of the year London has had a new Mayor – a position of real significance for tall buildings proposals as most are referable to him. Since the Election, we have seen early indications of new Mayoral policy and we think that the in principle support for tall buildings, in the correct location and of the highest design quality, will remain. Indeed, the new Mayor is keen to increase density in highly accessible suburban locations which may provide further support for tall building proposals. There have been other very significant political events since the last report, but these events do not appear to have had a marked impact on the tall building pipeline. Given the lead in time associated with this form of development this is not surprising and any impact may be evidenced in future surveys.

A number of prominent tall buildings have been topped out and/or completed during 2016 and as construction continues at similar levels to previous years we are now seeing the real transformation of parts of London through a rapidly changing townscape with new landmarks being created. Whilst not an area of research for this study, we have been interested by press reports of a growth in tall building proposals in regional cities (in particular Manchester and Liverpool) and we will follow emerging trends in these locations with some interest. There has been controversy this year, notably the emergence of a tall building in a strategic protected view of St Paul’s Cathedral from Richmond Park.

With the benefit of four years research, we are now able to see some key trends emerging. We think that the research has led to a greater understanding of tall buildings in London in terms of their benefits and impact and has stimulated a healthy debate. The risk and reward associated with tall buildings is a good indication of market confidence and we are pleased to report continued growth in this sector. We hope you enjoy this year’s report.
Contents

Executive summary 2
Introduction 4
Tall buildings pipeline 5
Map 10
Analysis 12
Industry comments 16
NLA recommendations 19
Research team 20
Executive summary

A record number of 26 tall buildings completed in 2016, compared to 10 in 2015. Over the last decade, the average number of tall building completions has been just six per annum.

A record number of starts – almost 1 a week. 48 tall buildings started construction in 2016, an increase of 68% on 2015, when it was 29.

83 new tall buildings were submitted for planning this year – down 30% on the year before at 119, which saw 40+ tall buildings submitted in Greenwich Peninsula.

The total pipeline of tall buildings in London which are proposed, approved and under construction has increased marginally to 455 in 2016, up from 436 in 2015.

24 of London’s 33 boroughs have a tall building pipeline. We are seeing a small shift towards outer London, with 82 tall buildings in zones 3-4 and 25 in zone 5.

60 new tall buildings have completed in the three years since the first London Tall Buildings Survey, and 91 are currently under construction. By 2019, we estimate 152 new tall buildings to have completed since the original Survey.

An estimated 30% of homes currently under construction in London are in tall buildings.

256 tall buildings currently have planning permission to go ahead and are awaiting construction. But 31 tall buildings which received planning over 5 years ago are still not on site.

100,000 new homes are estimated across the entire tall buildings pipeline, or two years’ worth of housing need based on GLA requirements of 50,000 new dwellings per annum.

The entire pipeline is estimated to cover 38 hectares.