LONDON TALL BUILDINGS SURVEY 2018

This NLA Research Paper is published by New London Architecture (NLA) in April 2018. It is an annual publication 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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EXECUTIVE SUMMARY

510 tall buildings in the pipeline - up from 455 of 2016

A record number of 115 schemes are now under construction across the capital, but starts are down 25% from the previous year, with construction taking longer to reach completion.

Over 100,000 homes could be provided with the entire tall buildings pipeline by 2030 - equivalent to 1.6 years of housing supply according to the new London Plan housing targets of 66,000 new homes a year.

Southwark, Newham and Croydon see record increases with tall buildings pipelines respectively as 48, 39 and 27.

Half of the tall buildings pipeline is in East London sub-region, with 252 tall buildings, followed by Central London with 99.

Opportunity Areas and new transport nodes are the main locations for new tall buildings clusters.

Bromley and Waltham Forest have for the first time at least a tall building in the pipeline.

2017 shows a slowdown in the rate of applications, down 10% from 2016 and 35% from 2015, when we saw the exceptional application for Greenwich Peninsula.

Over 100,000 homes could be provided with the entire tall buildings pipeline by 2030 - equivalent to 1.5 years of housing supply according to the new London Plan housing targets of 66,000 new homes a year.

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INTRODUCTION

By Peter Murray, Chairman, New London Architecture

This year the NLA's annual tally of tall buildings, with research partner GL Hearn and data provided from EG, shows signs of a slowdown. This is to be expected; the uncertainties created by Brexit are causing projects to be postponed with higher stamp duty also introduced in December. However, these figures should not be interpreted as the end of tall building in London. There are still a total of 510 in the pipeline which will be constructed over the next decade or so and others will soon follow. The Mayor of London's Draft London Plan calls for the delivery of 66,000 new homes in the capital, a figure that will be very hard to achieve at the best of times but with the difficulties of finding sites, increasing nimbyism and an unwillingness to impact on the Green Belt, it is just not feasible.

Tall buildings, of course, are not the sole answer to delivering more and denser housing; medium rise mansion blocks can provide sufficient densities in sensitive areas. But if we are to make the best use of land, towers provide an answer for delivering largely non-family housing. Tall buildings are, for example, particularly relevant to the sort of sites that Transport for London are developing around stations where residents benefit from easy access to public transport as well as the high levels of amenity that denser urban environments can deliver.

A striking example of the efficient use of land is Majestic Crescent in Wandsworth developed by Pocket Living, supported by the Mayor’s Innovation Fund. Located in inner London close to Wandsworth train centre, the tower is 27 storeys high and contains some 89 apartments, but the remarkable thing is that it sits on a triangular site of less than half a hectare – the space that would be occupied by just two houses in a suburban area. In the right places, towers allow us to use the finite resource of land.

This is the fifth NLA annual survey. Each year we have called for greater scrutiny of the design of tall buildings and for smarter ways of assessing quality with the use of digital technology and a London-wide computer generated 3D model. We were gratified to see both these issues addressed in the new London Plan.

The 50 Mayor’s Design Advocates appointed by Sadiq Khan will provide the sort of high level advice that is required for a building form that has such wide visual and physical impact, whereas a 3D model will assist both planners and public to understand precisely what these impacts will be.

However, the Mayor still needs to select a platform that will provide him with the necessary information. In this report we are using images from the VU.CITY digital model which has been developed in collaboration with Urban Data Pocket. We believe, as this system develops, that it will provide a pan-London tool for better decision-making.
As the number of tall buildings in London continues to increase, their spatial distribution across the capital can be even more indicative of where growth hotspots are. Opportunities exist, alongside new planned transport lines and station sites, to support significant development and growth. When tall buildings clusters are in these areas, they can benefit from good access to public transport and other amenities, while being able to deliver more homes with an efficient use of land.

The Current London Plan Defines 38 Opportunity Areas:

- Bexley Riverside
- Bromley
- Canada Water
- Charlton Riverside
- City Fringe/Teeth City
- Colindale/Burnt Oak
- Cricklewood/Brent Cross
- Chorley
- Deptford Creek/ Greenwich Riverside
- Earls Court & West Kensington
- Elephant & Castle
- Euston
- Greenwich Peninsula
- Hammers & West Acton
- Heathrow
- Hildre
- Isle of Dogs
- Kentish Canary
- Kings Cross-St Pancras
- London Bridge, Borough & Bankside
- London Riverside
- Lower Lee Valley (including Stratford)
- Old Kent Road
- Paddington
- Park Royal
- Old Oak Common
- Royal Docks & Beckton Riverside
- Southall
- Thamesmead and Abbey Wood
- Tottenham Court Road
- Upper Lea Valley (including Stratford)
- Old Kent Road
- Paddington
- Park Royal
- Old Oak Common
- Royal Docks & Beckton Riverside
- Southall
- Thamesmead and Abbey Wood
- Tottenham Court Road
THE PIPELINE

By Paul Wellman, Senior Analyst, EG

For the purpose of this research, the 2017 pipeline is defined as all London tall buildings, of 20 storeys or above, that have been submitted to planning, either as Environmental Impact Assessment (EIA) or application; have planning permission or are under construction, in the period between 1st January 2017 and 31st December 2017.

OVERVIEW

Tall buildings across the capital fell back in 2017, in relation to both applications and starts, a bellwether for the state of the market, being 10% and 25% down on the previous year, respectively.

With economic and political headwinds encapsulating a rather uncertain market, this year’s findings won’t come as a huge surprise from the record highs of 2016.

However, what is coming through the planning system and out of the ground, is increasingly across the outer London boroughs, in zones 3, 4 and 5, as well as for the build-to-rent market, mirroring the wider new-build housing market.

Looking forward, the entire future pipeline now stands at 510 tall buildings, up from 455 of the previous year. That figure includes all those schemes, of 20 storeys or above, that have been submitted for planning, with planning permission or under construction across all London Boroughs.

APPLICATIONS

The number of planning applications for tall buildings in 2017 fell by 10% on the previous year, and 35% on the corresponding figure for 2015. It must be noted that 2015 was an exceptional year, with the exceptional application of Greenwich Peninsula for over 40 tall buildings. Taking that anomaly away from the figures, the past five years present a rather flat line, yet clearly far exceeding the levels seen up to 2012.

With at least another 57 tall buildings submitted as EIA in 2017, we would expect forthcoming applications on those sites to come through in due course.

PERMISSIONS

63 tall buildings were granted planning consent in 2017 at planning committee, just one more than 2016. However, this was around half the figure for 2014 and 2015, which saw 104 and 153 tall buildings consented respectively.