

# Accommodating Growth Workshop

## 2<sup>nd</sup> November 2016

MAYOR OF LONDON

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**A City for all  
Londoners**



October 2016

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# Mayoral Strategies

- London Plan
- Housing
- Transport
- Economic Development
- Environment
- Health and Health Inequalities
- Cultural Strategy

# Growth Challenges

- Population 8.8m (2015), c70k pa 2041
- Households: 3.4 m (2014) c44k to 2041
- Housing need: at least 55kpa?
- Employment 5.8m (2016) – 44k pa? (2041)

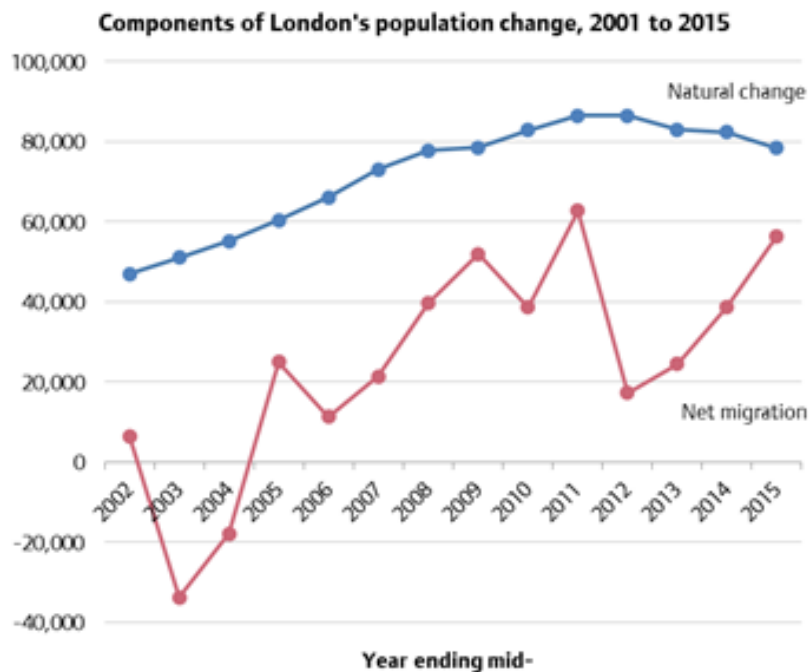


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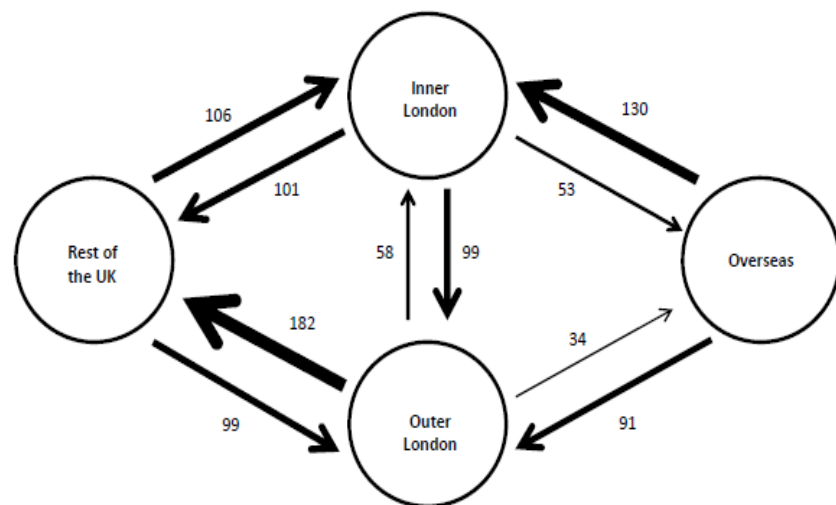
# Components of demographic change

Net natural change and net migration

Migration flows 2012

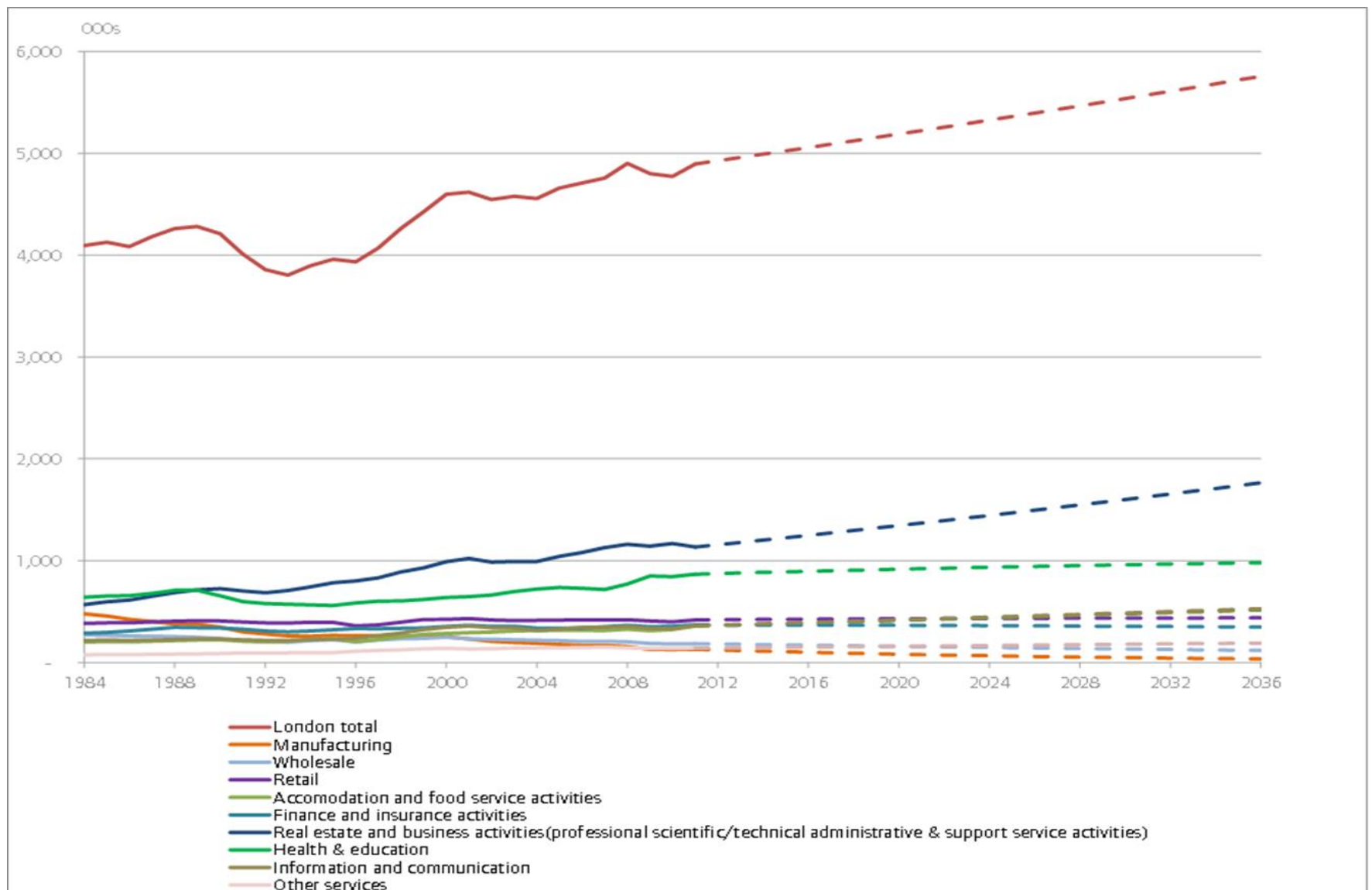


Internal and international migration flows (thousands) – mid-2015



Source: ONS internal migration estimates; ONS mid-year components of change

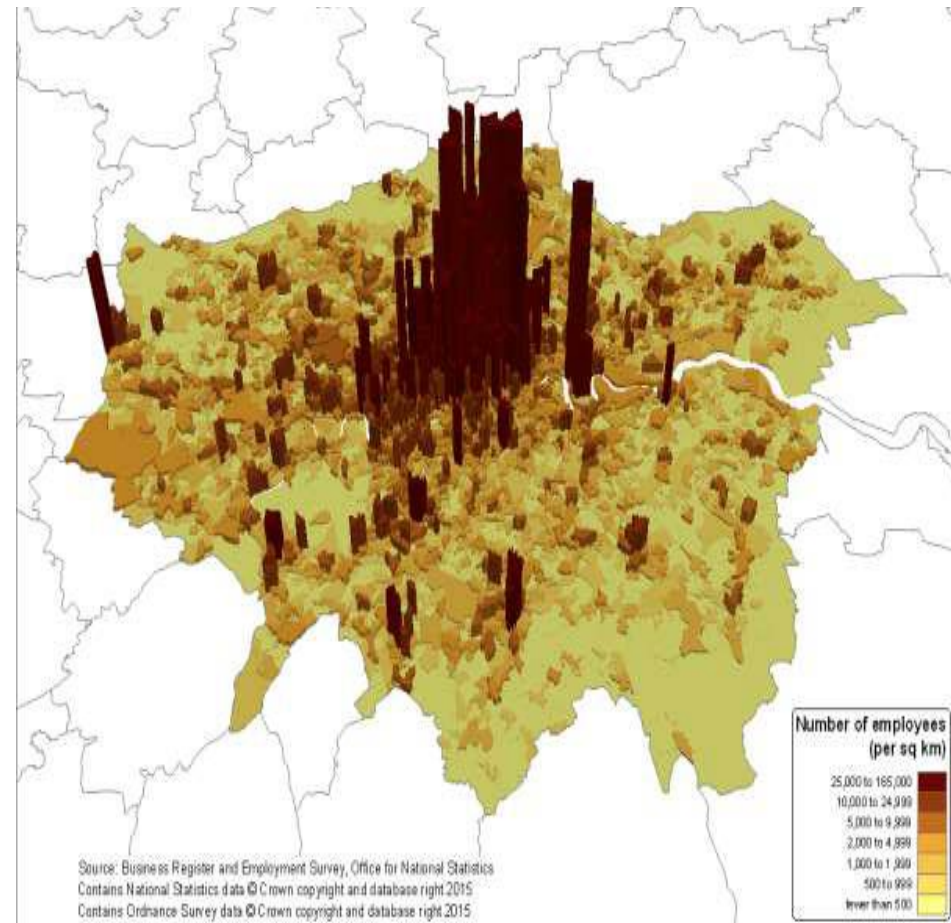
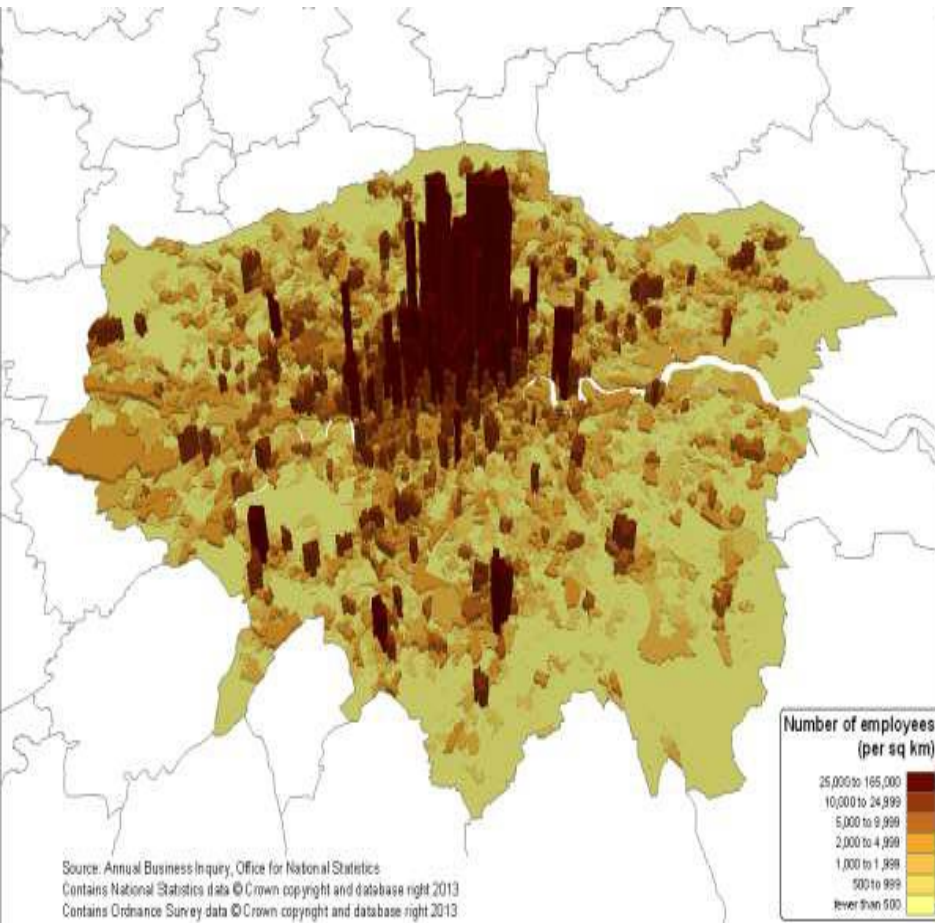
# Components of economic change



# Employment density

## Employment density 2003

## Employment density 2014



# Good Growth

## PRINCIPLES

- Access to good homes and jobs
- Integration of land use and transport
- Green growth
- Cultural capital
- Infrastructure for people and communities
- Changing the way we travel
- Improving transport connectivity



# Good Growth

- Reconciling competing land uses
- Securing employment land in central London
- ...and elsewhere
- Encouraging housing & mixed land uses
- Integrating housing & infrastructure investment
- Protecting the Green Belt and other designated open spaces
- Identifying land to accommodate at least 50,000 homes a year
- Eg: town centre renewal, suburban intensification, estate renewal, Opportunity/Intensification Areas, industrial relocation/co-location, better use of the pipeline, 'dev corridors' within & beyond London with partners for growth



# Land use transport integration

## Transport Infrastructure

- Continuous improvement of existing networks, eg:
  - Tube upgrades
  - Bus service upgrades
  - Step free access
- New infrastructure, eg:
  - Crossrail 1,
  - Crossrail 2,
  - HS2
- Extending existing links, eg:
  - Bakerloo Line Extension,
  - Gospel Oak – Barking Riverside
- New river crossings, eg:
  - Silvertown Tunnel
  - Rotherhithe-Canary Wharf link
  - Gallions Reach – Thamesmead DLR
- Rail franchise devolution and ‘metroisation’



# Land use transport integration

## Cycling & Walking

### Healthy Streets

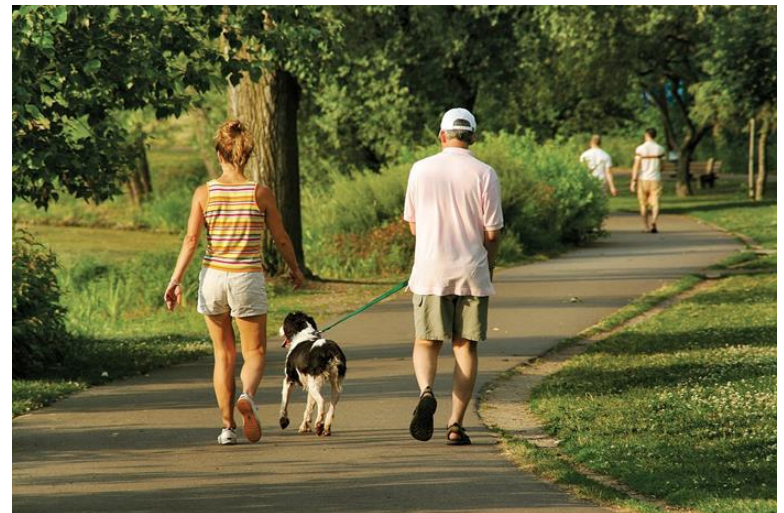
- reduce emissions, traffic, noise – ‘people friendly streets’ eg pedestrianise Oxford Street

### Comprehensive cycling and walking networks

- Zone 1 Cycle Grid,
- Quietways/Superhighways (better coordination)

### Road Safety

- ‘Vision Zero’ to road safety;
- promote resi 20 mph speed limit;
- safer lorries;
- investigate driverless cars



# What might it mean for the transport network?

## THE CITY

2004 LONDON PLAN ESTIMATES

89,680 HOMES

404,700 JOBS

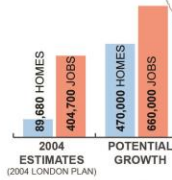
215,000 PEOPLE

POTENTIAL GROWTH

470,000 HOMES

660,000 JOBS

1,165,000 PEOPLE



## CITY IN THE EAST

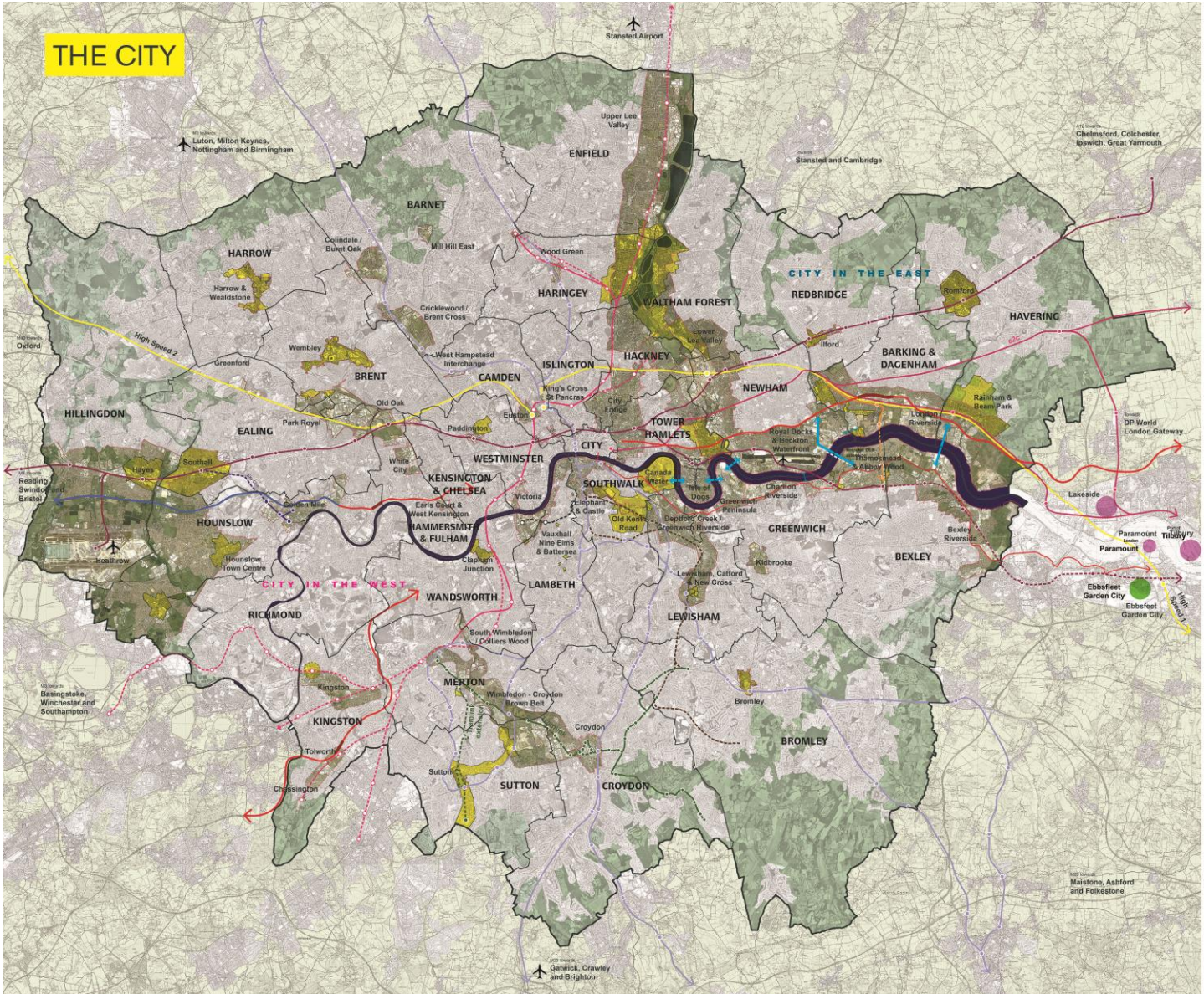
[www.london.gov.uk/cityintheeast](http://www.london.gov.uk/cityintheeast)



## CITY IN THE WEST

[www.london.gov.uk/cityinthewest](http://www.london.gov.uk/cityinthewest)

# What might it mean for 'real' places?



**46**  
Opportunity Areas



**7**  
Intensification Areas



**30**  
Housing Zones



**7**  
New transport links



**4**  
Growth Corridors



**5**  
New River Crossings

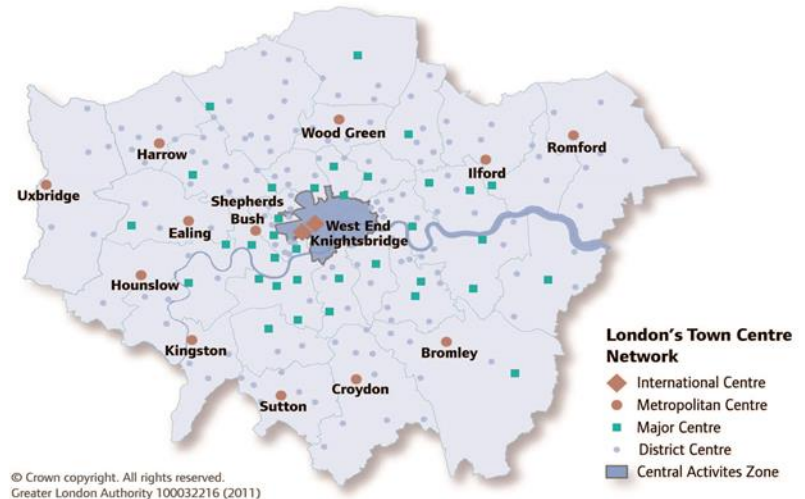
**KEY**

- Opportunity Area
- New Opportunity Area
- Intensification Area
- Housing Zone
- River Crossing
- Green Belt - London
- Green Belt

# Within London: town centre renewal

## Town centres themselves:

- Structural change in the retail sector provides challenges and opportunities
- Particularly affects 'District' and some 'Major' centres
- Higher density, housing led, mixed use selective redevelopment
- Medium/long term solution
- Particularly suits smaller households eg some older Londoners
- Must complement 'character'
- Could provide modern commercial and community space and street improvements



## Areas around town centres:

- New design policies to resolve tensions with existing housing



# Within London : suburban intensification

- Above PTAL 2
- Range of built forms: traditional flat conversions; pairs of semis to 4 storey walk-ups; comprehensive street block renewal
- Site assembly issues for blocks
- Support smaller developers?
- Starter Homes?
- Short to long term
- Specify in London Plan or criteria based policy

Scenario 4b HTA 'Supurbia': 2015; existing situation; 304 tonnes CO<sub>2</sub>; 38 hhlds, 110 pop; 23 cars



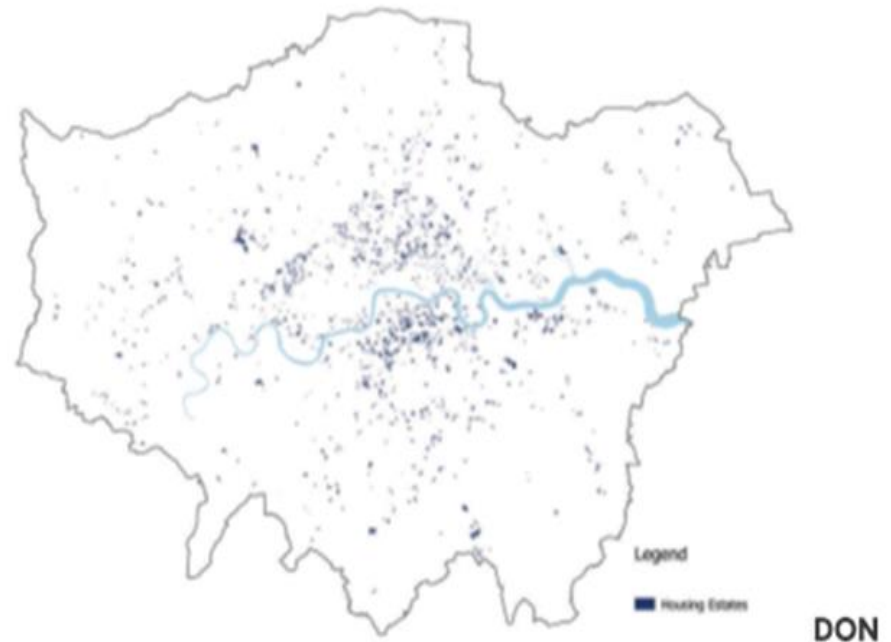
HTA 'Supurbia': 2030; 100% resi redev, 50 tonnes CO<sub>2</sub>; 60% car share; 101 hhlds; 222 pop; 28 cars



# Within London: estate renewal

- GLA testing realistic potential of estate renewal
- Mayor concerned to engage existing residents
- A medium/long term contributor to future provision?
- Specify in London Plan?

LONDON HOUSING ESTATE RENEWAL?  
(AREAS WITH MORE THAN 2/3 SOCIAL  
HOUSING. SHELTER)

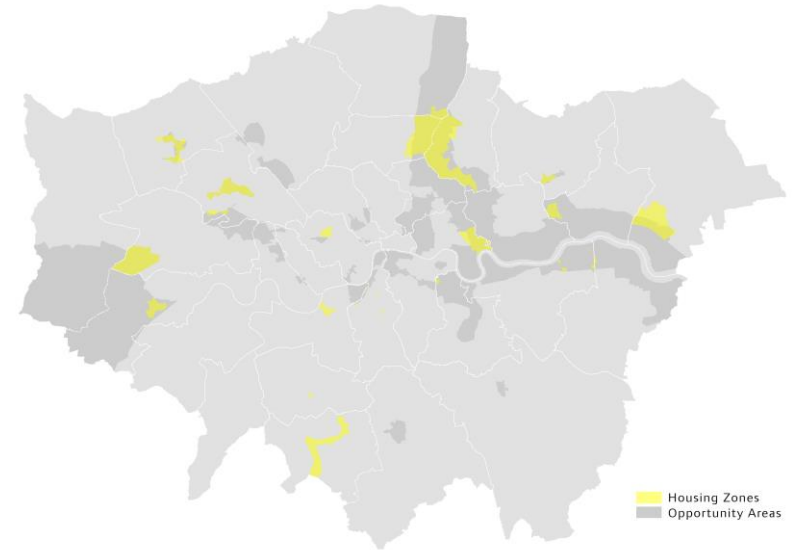


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# Within London: Opportunity/ Intensification Areas/Housing Zones

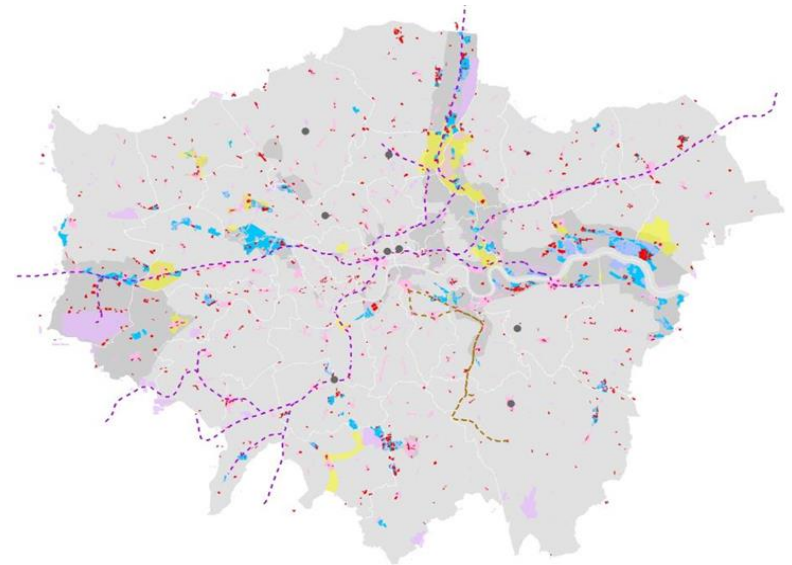
**Opportunity Areas:** biggest 'brownfields' - at least 2,500 homes and/or 5,000 jobs

- Long term
- Imaginative planning and housing investment increases capacity:



**Intensification Areas:** smaller, already built up but good PTAL

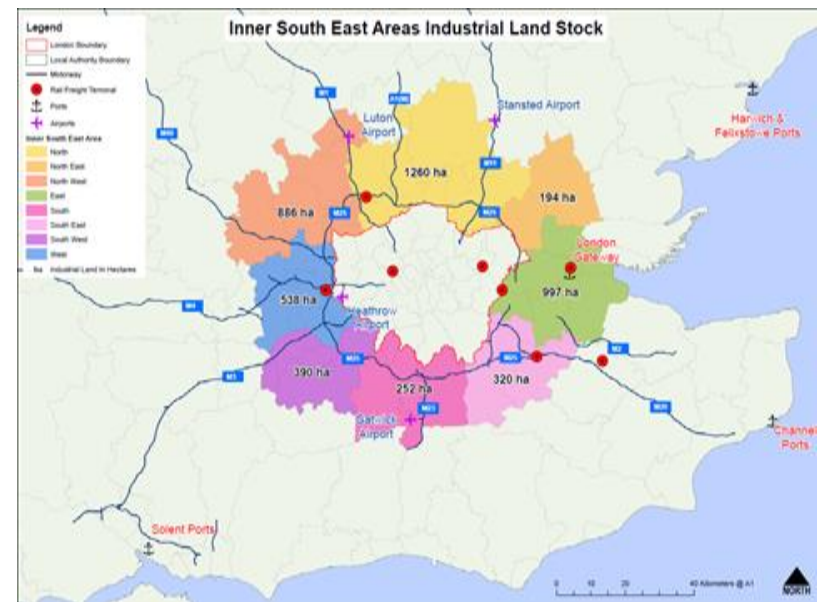
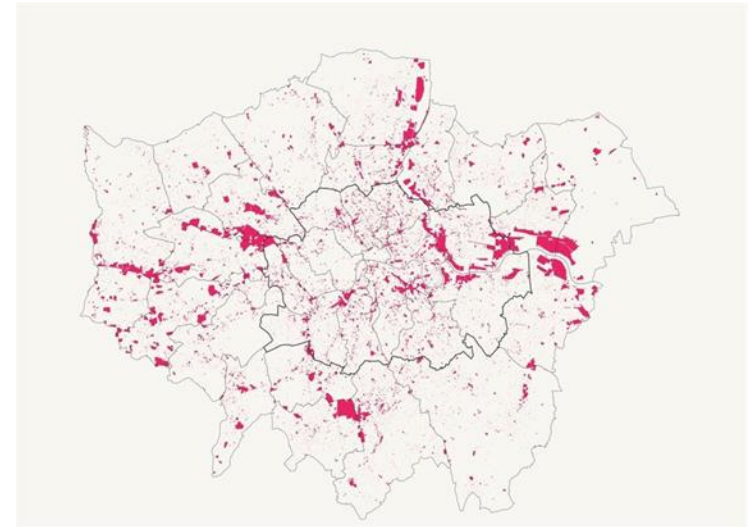
- LB led – limited progress. More Mayoral involvement?
- Further designations (see bottom map)?





# Within London: industrial intensification, re-location and co-location

- Currently 7000 ha industrial land
- Managed release of surplus: c40 ha pa benchmark (focused on East London)
- But actually releasing 2-3 x benchmark
- Exploring scope for intensification, relocation and co-location within London to release potential higher density housing
- Also relocation beyond London
- Economic impact being tested
- Medium term

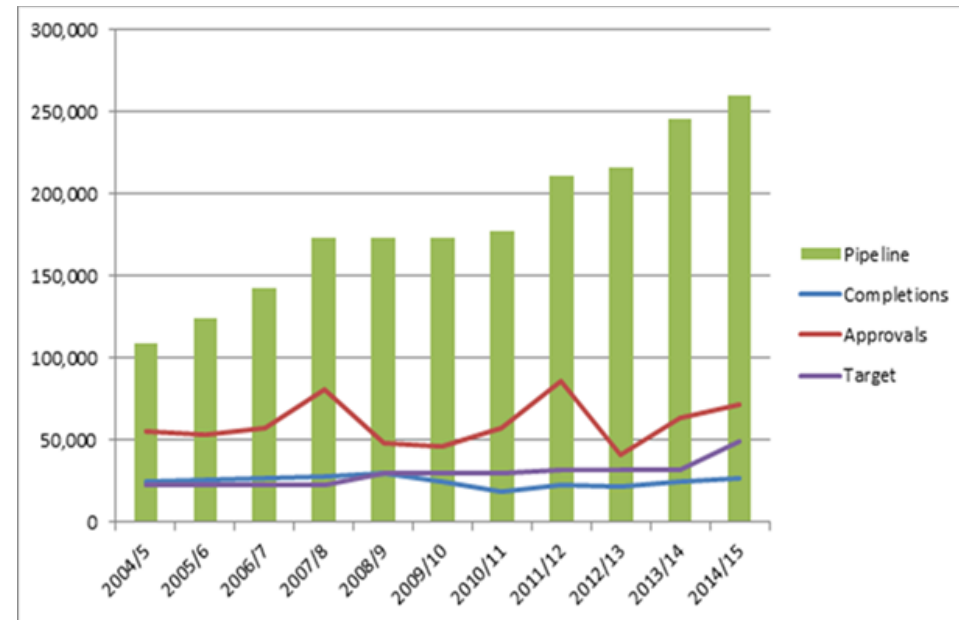
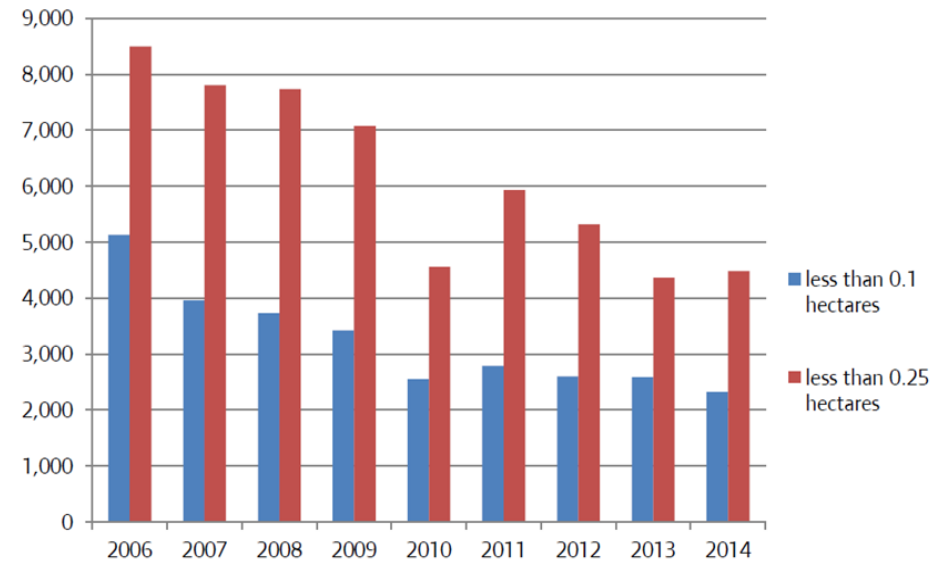


# Within London: making better use of the existing pipeline

- 10 year average 25,000 completions pa; +50,000 approvals; 270,000 pipeline on rising trend

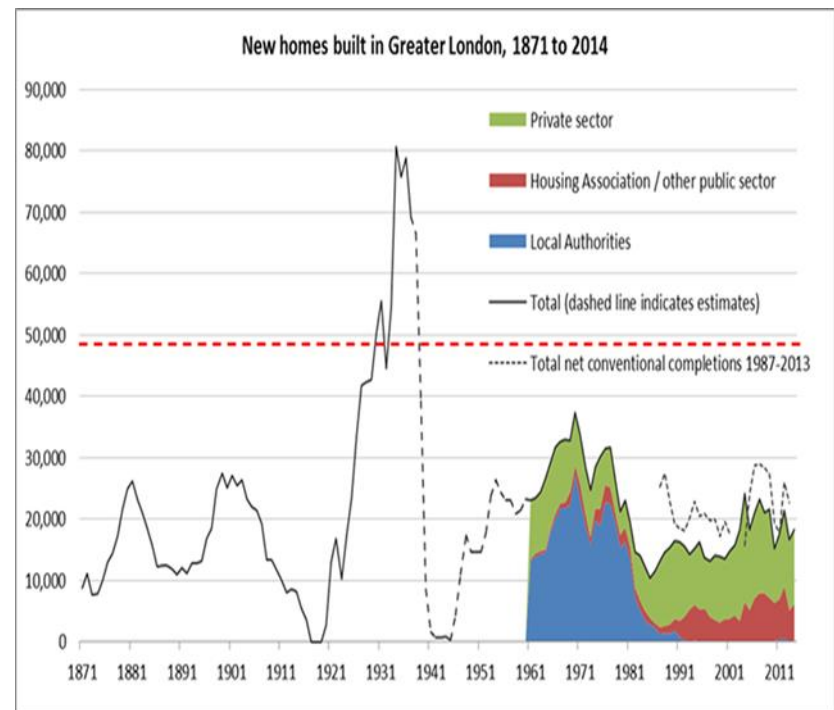
## Complex reasons for this:

- Increase site numbers, reduce size
- Small sites and SME builders
- Speed infrastructure delivery
- Speed public land release
- Skills, labour and supplies
- Planning must continue to increase capacity and streamline delivery eg S106, Res Matters?
- Assess role of 'off plan' buy to rent investors
- 'Use it or lose it': eg review mechanism triggers, permission timescales and phasing schemes, CPO, Council tax levy, redefine 'commencement'?
- 'Absorption' - extend range of strategic development sectors: BTR, 'public housing companies'



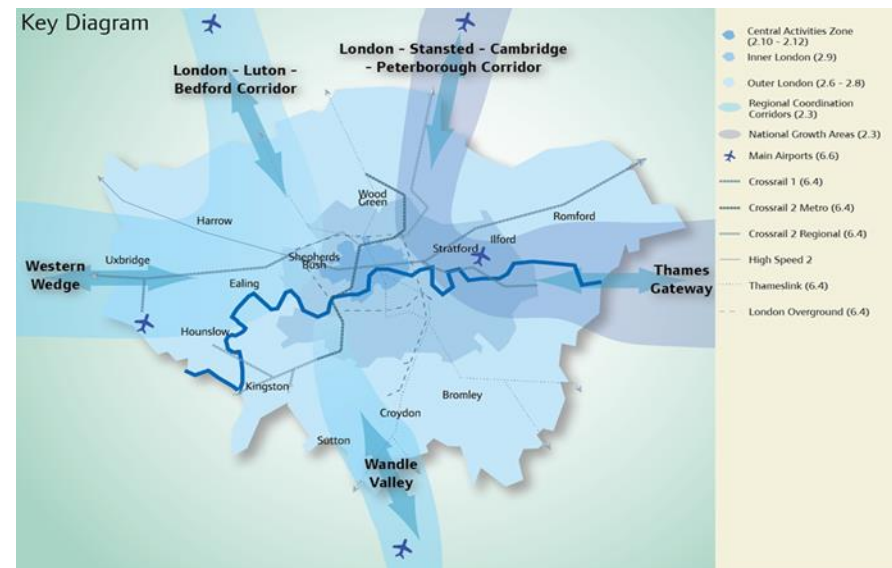
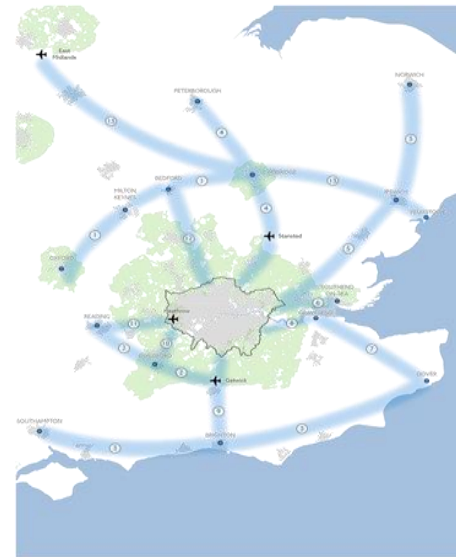
# Sectoral contributors to housing growth

- Historic contribution from council housing
- Possible future major sectoral contributors eg PRS, 'housing companies', small builders

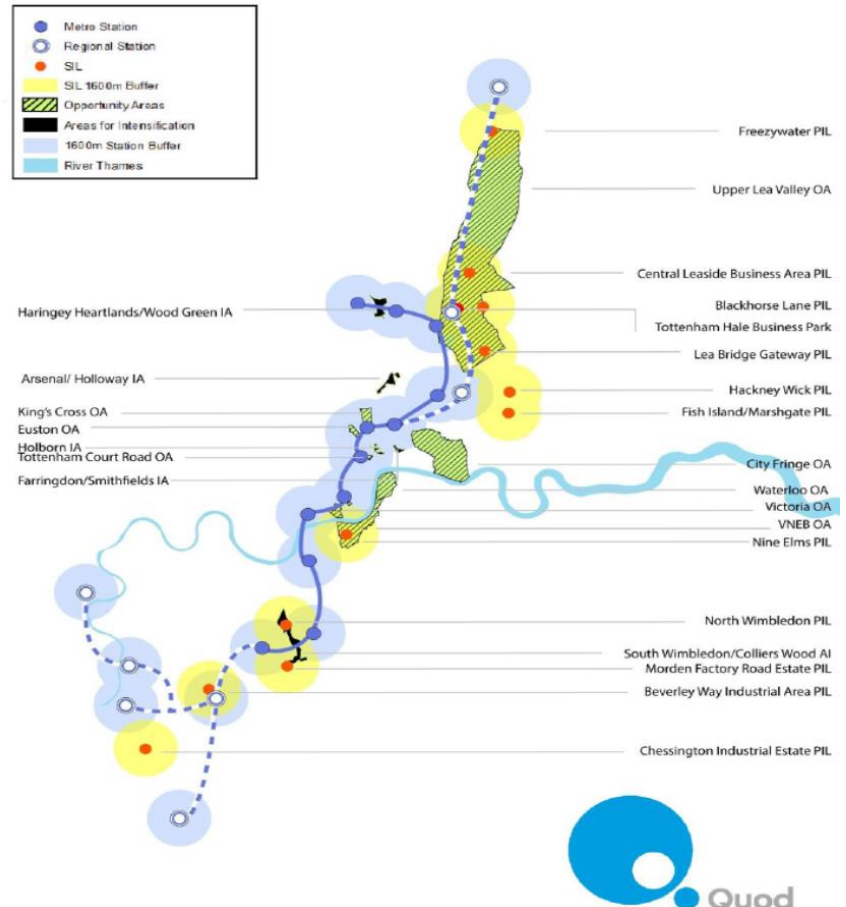
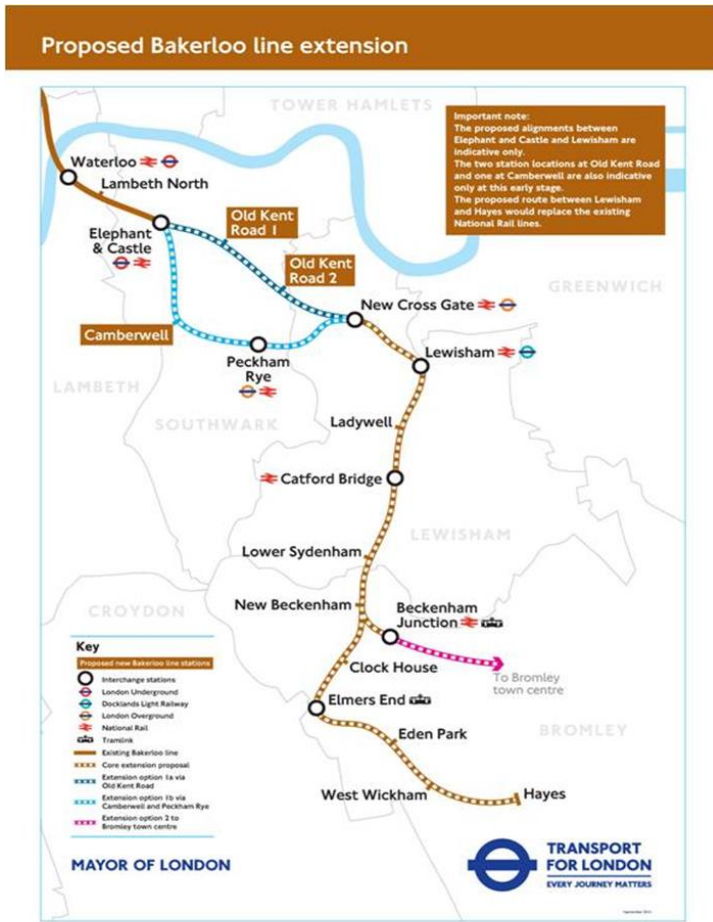


# Beyond London: partners for growth

- London not an island: 800,000 daily commuters.
- Wider housing market area
- Explore scope for common growth/coordination corridors
- Eg focused on 'commutable' existing urban areas, perhaps those with high deprivation where density currently low.
- Can initial active regional engagement focus on 'partners for growth' eg London-Cambridge line, Crossrail 1 extension, possibly also along C2C and East Anglia line?
- How should this be flagged in the London Plan?



# Composite scenarios: within and beyond London





# Sub-regions: too rigid, or too flexible?

