

Opportunity Area Portrait

City Fringe/Tech City



Introduction

List of acronyms and abbreviations

- OA: Opportunity Area
- LP: London Plan
- GLA: Greater London Authority
- TfL: Transport for London
- OAPF: Opportunity Area Planning Framework
- CAZ: Central Activities Zone
- LESD: London Employment Sites Database
- SHLAA: Strategic Housing Land Availability Assessment
- LB: London Borough
- RB: Royal Borough
- AAP: Area Action Plan
- SPD: Supplementary Planning Document
- SIL: Strategic Industrial Land
- LSIS: Locally Significant Industrial Sites
- BID: Business Improvement District
- CEZ: Creative Enterprise Zone

Introduction

Purpose of this document and clarifications



What is a pen portrait:

- A strategic analysis/ summary of an OA.
- We collected a series of data on delivery of homes, jobs, town centres and high streets, transport, land use and industrial land to assess local change at a strategic level, to better understand places in the OAs, and evaluate how they are performing against the expectations in the London Plan 2021.



How will this information be used?

- This evidence base supports the OA propositions in the High-Level document.
- The OA propositions include:
 - change in the status of the OA to reflect the housing and/or infrastructure delivery since 2019
 - highlight opportunities to review the OA boundary and/ or OA designation.



Data sources and clarifications

Homes

- The London Plan 2021 identifies indicative homes capacities (10 year, 22 year).
- The indicative homes capacities are based on the SHLAA 2017.
- The monitoring year for the London Plan 2021 starts in 2019.
- This document includes an overview on the progress against the SHLAA 2017 to understand what has happened in the OA.
- Acknowledging that a lot has changed since 2017, including the adoption of new development plans, the current document provides an overview of site allocations based on the latest publicly accessible information.
- All spatial data is available in the London Datastore, unless stated otherwise.
- All data relating to development progress is available via the Planning Data Hub, unless stated otherwise.

Introduction

Purpose of this document and clarifications

Data sources and clarifications

Jobs



- The LESD is a database that records recently completed employment developments and those in the pipeline in London to produce an estimate of London's additional employment capacity.
- Since the adoption of the London Plan 2021, a new London Employment Sites Database was produced in 2021. This provides up to date estimates by OA.
- A jobs dashboard has been produced to monitor the jobs' performance in the OAs.

Local Plan status



- Local Plan status information is based on publicly available data, or information received by the boroughs.

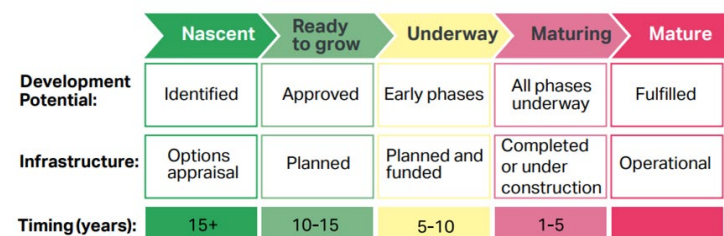
OA boundaries

- The London Plan designates OAs, whilst the boundary can be adopted through development plans. See more on [OA boundaries](#).

OA status - London Plan 2021

- The OA categorisation in the Key info refers to the London Plan 2021 Figure 2.2 - OAPF process diagram, also shown below:

Figure 2.2 - OAPF process diagram

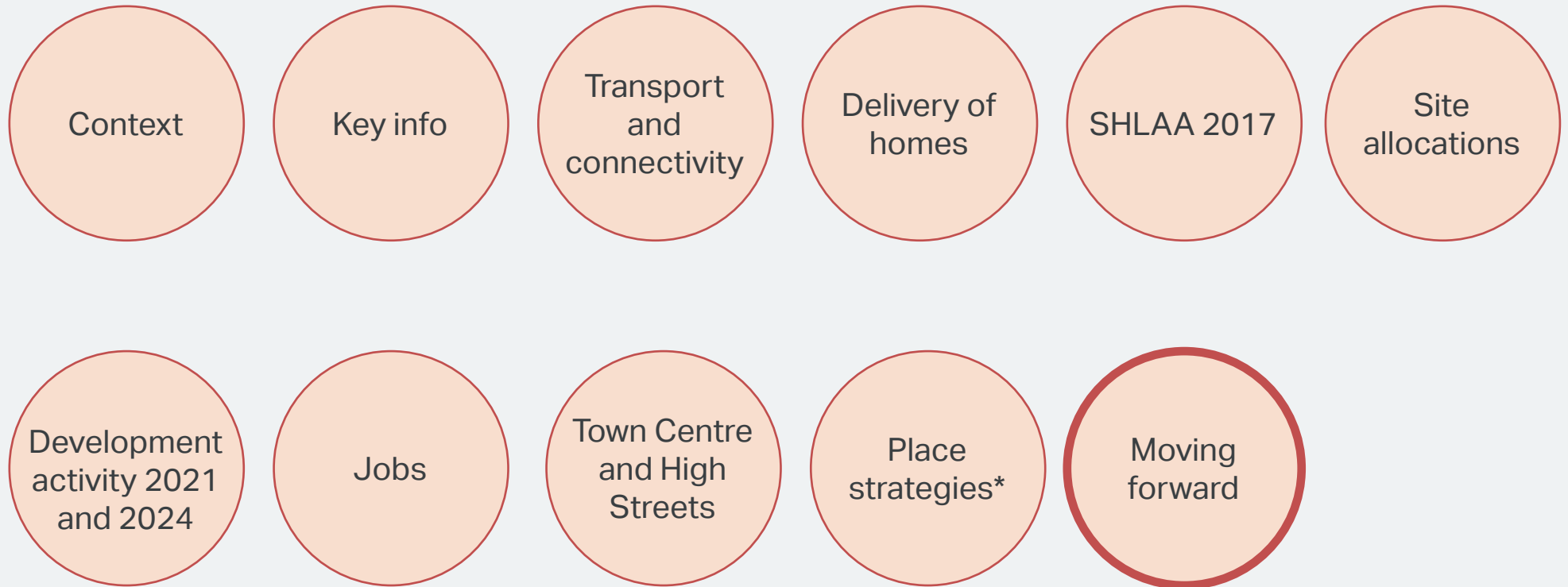


Additional resources

- Growth Corridors: [Engagement summaries from Planning for London events \(November/December 2024\)](#)
- Opportunity Area monitoring GLA [webpage](#).

Introduction

Contents



* This section refers to existing/ emerging strategies for the OA.

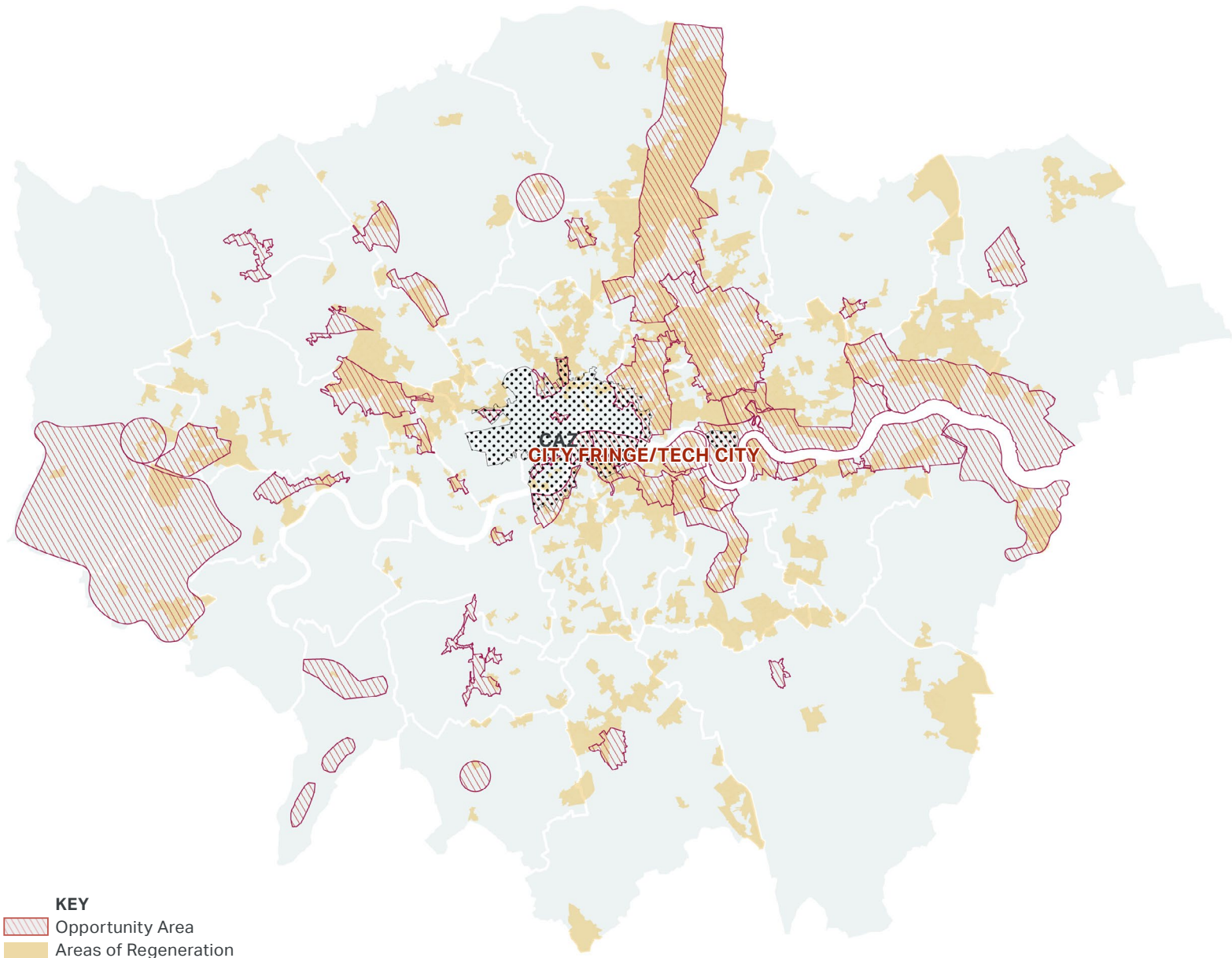
City Fringe/Tech City Context

OAs in the CAZ

- King's Cross (Maturing)
- Tottenham Court Road (Maturing)
- Victoria (Maturing)
- Paddington (Underway)
- Waterloo (Maturing)
- London Bridge/ Bankside (Maturing)
- Euston (Ready to Grow)
- VNEB (Underway)
- Paddington (Underway)
- Elephant & Castle (Underway)
- **Part of City Fringe/ Tech City (Underway)**

Areas of Regeneration

The City Fringe/Tech City OA includes several areas of regeneration.

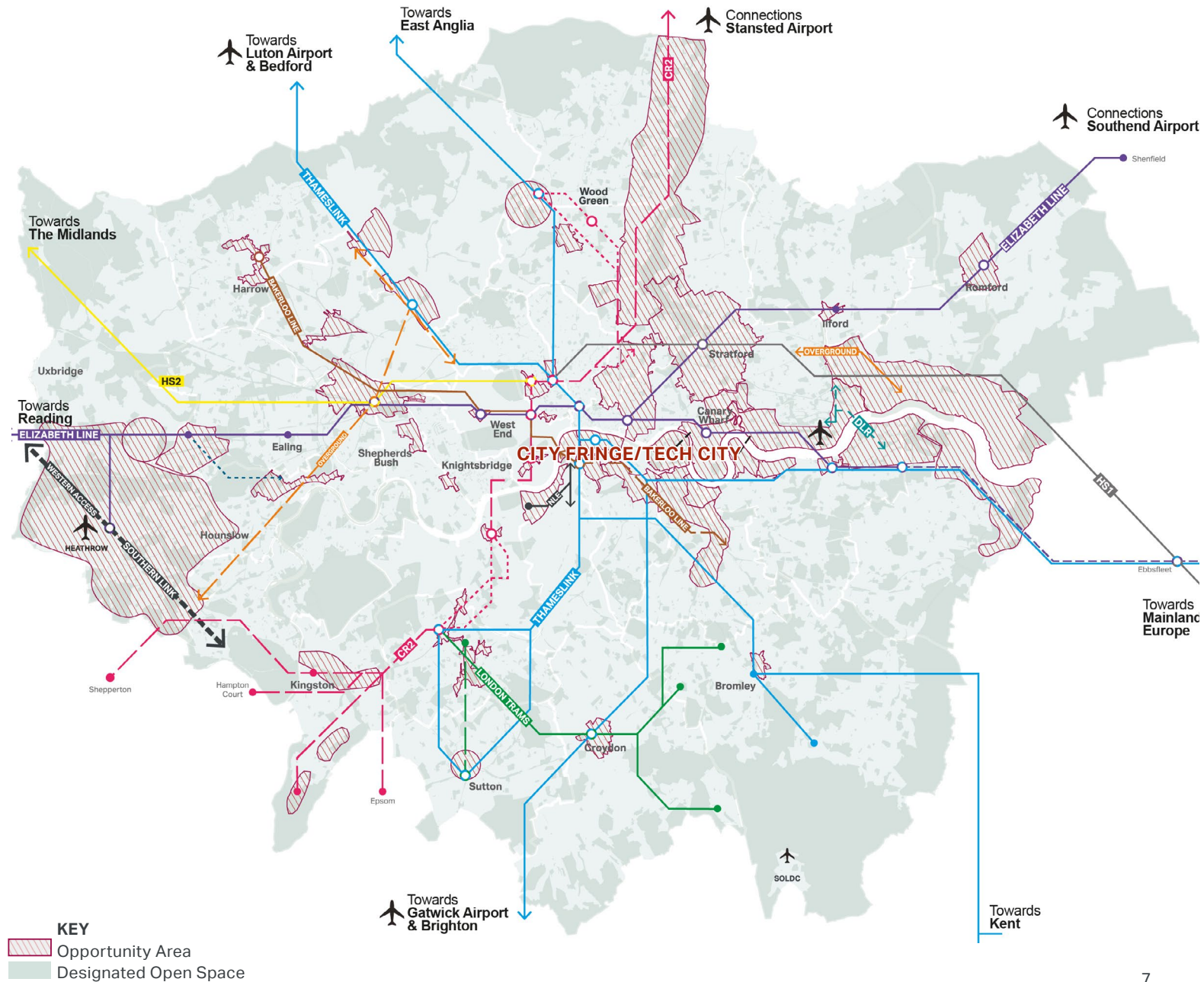


Source: Areas of Regeneration as per London Plan 2021

City Fringe/Tech City Context

Transport and Growth Corridors

- Very well connected OA, with the Elizabeth Line, National Rail services, HS1 as well as several London Underground lines and Overground services.
- The [London Growth Plan](#) proposes the devolution of the Great Northern rail service to TfL. This service currently that travels through Old Street in the OA towards Cambridge and Peterborough.

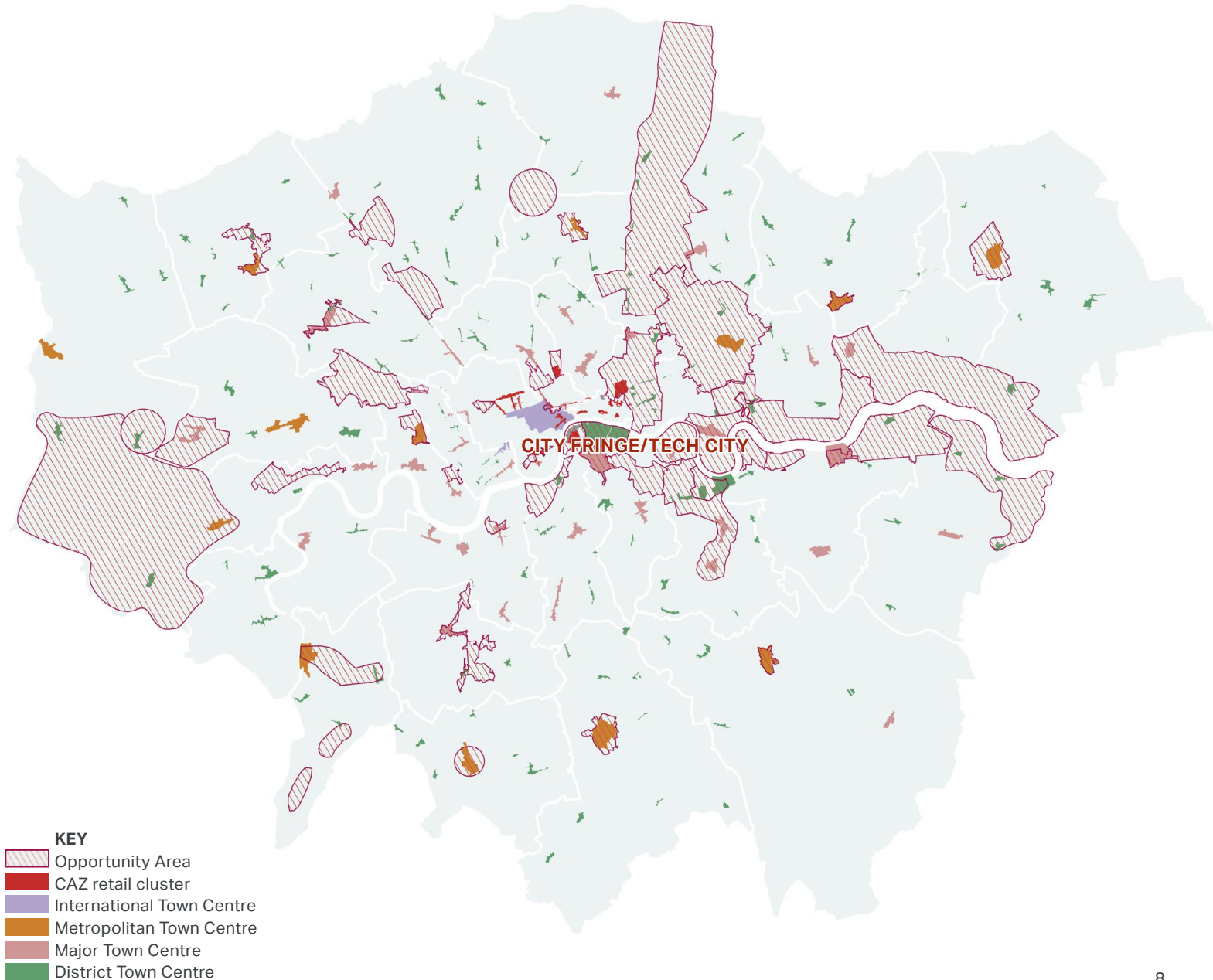


City Fringe/Tech City Context

OAs and Metropolitan Town Centres

- Olympic Legacy (Maturing)
- Harrow & Wealdstone (Underway)
- White City (Underway)
- Croydon (Ready to grow)
- Romford (Ready to grow)
- Ilford (Ready to grow)
- Wood Green (Nascent)
- Kingston (Nascent)
- Bromley (Nascent)
- Sutton (Nascent)

The OA has an adopted boundary. The adopted boundary comprises of a number of **District Town Centres**.



KEY

- Opportunity Area
- CAZ retail cluster
- International Town Centre
- Metropolitan Town Centre
- Major Town Centre
- District Town Centre

Source: [Planning Data Map](#)

City Fringe/Tech City

Key info

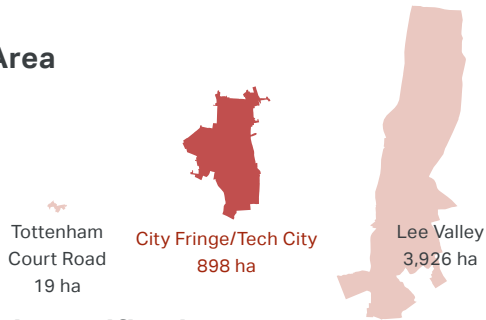
London Plan Designation Year

2004 2008 2011 2016 2021

Borough

LB Hackney, LB Islington, LB Tower Hamlets

Area



OA specific plans

City Fringe OAPF (2015)

Local Plan status

Hackney LP33 - adopted in 2020, Islington Local Plan - adopted in 2023, Tower Hamlets Local Plan 2031 - adopted in 2020, Regulation 19 in progress

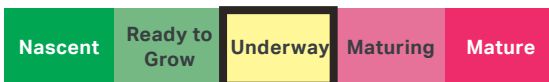
Growth Corridor

Central London

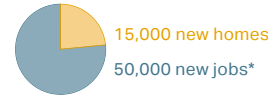
Housing Delivery Test 2023

Hackney - Action Plan, Islington - Buffer, Tower Hamlets - Action Plan

OA status (LP 2021)



London Plan 2021 capacities by 2041



Source: Google Earth

KEY

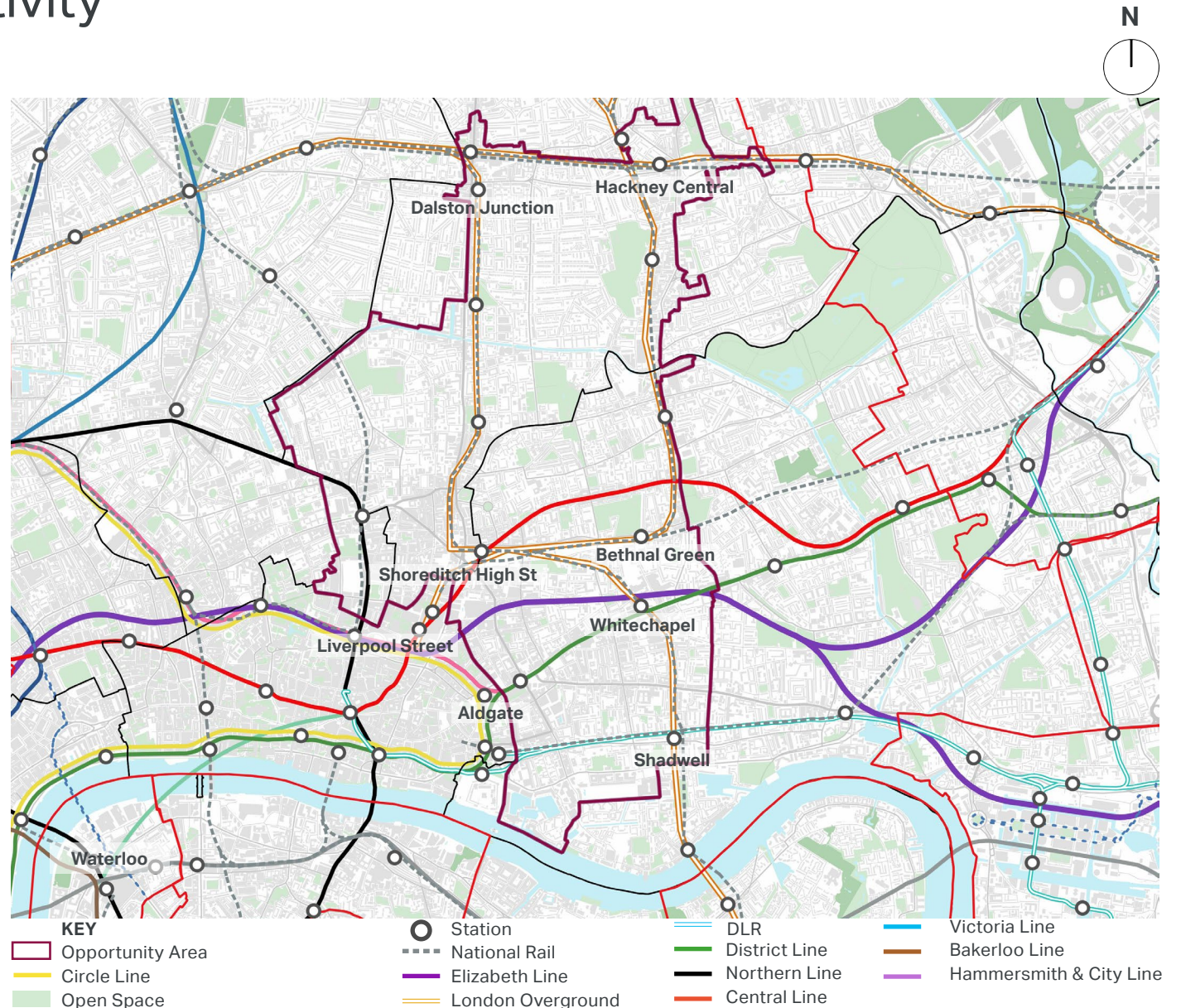
Opportunity Area

*Note that the LESD (2021) increased the capacity to 75,700 new jobs

City Fringe/Tech City

Transport and connectivity

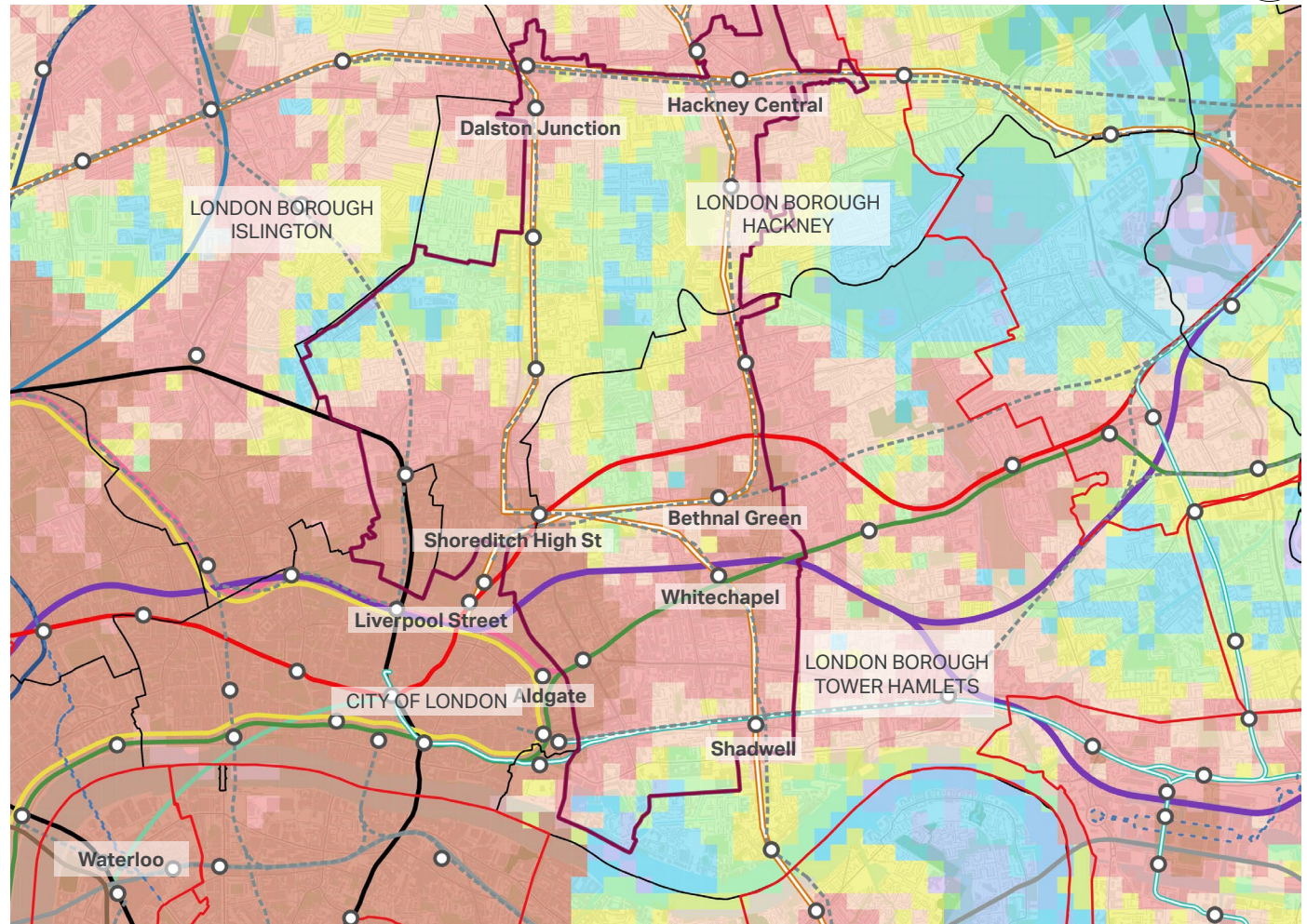
- City Fringe/Tech City OA is low TfL priority area. No sites are identified by TfL where transport is holding back development.
- Old Street roundabout improvement by TfL is set to be complete this year.
- Key transport interventions completed in 2022 include Crossrail (Elizabeth Line) at Whitechapel Station and London Overground station improvements at Hackney Central and Whitechapel.



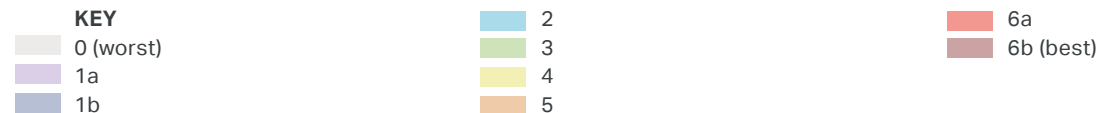
City Fringe/Tech City

Transport and connectivity: PTAL 2031

- Majority of the OA in 2031 is forecast to have a high PTAL rating of 6a and 6b which are the best accessibility ratings.
- The OA is forecast to benefit from several London Underground, London Overground, National Rail links.
- North of the OA that sits within Hackney and Tower Hamlets is forecast to have an average rating of 3.



Source: Transport For London

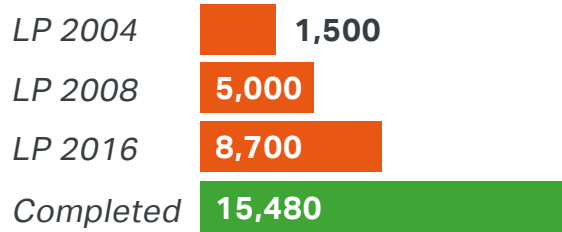


City Fringe/Tech City

Delivery of homes

Delivery pre-2019

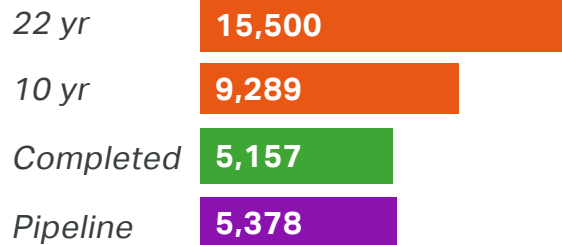
Completions since designation against capacity



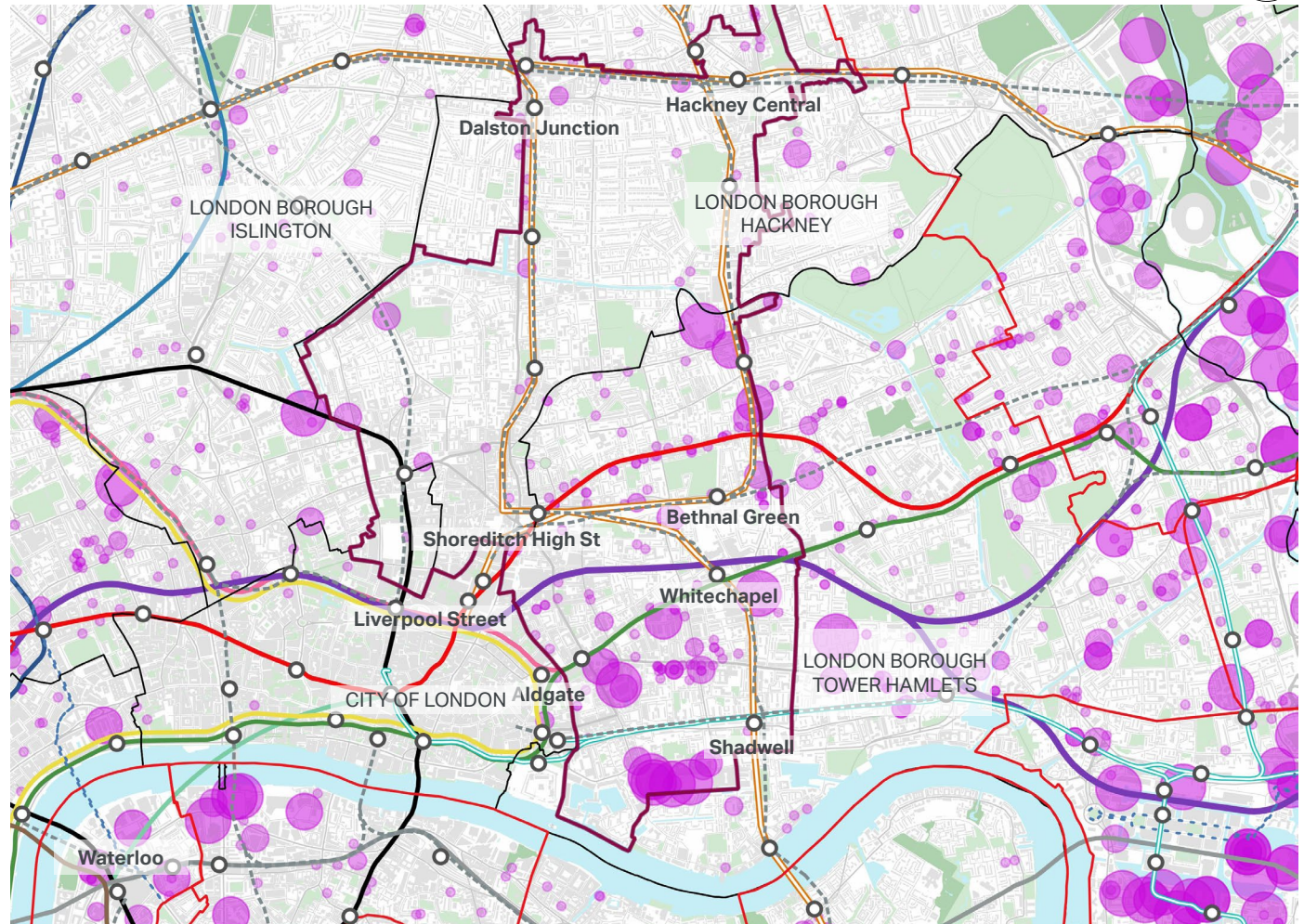
The OA was designated in 2004, with two smaller boundaries (Bishopsgate/South Shoreditch and Whitechapel/Aldgate). Since designation the OA delivered a high number of homes.

Delivery post - 2019 (London Plan 2021)

Progress against 22yr, 10 yr capacity



Since 2019/2020 and until 2023/2024, 5,237 new homes have been completed. Considering the completions along the OA has met 56 per cent of its 10-year indicative homes capacity. When adding the completions and the current pipeline, the performance of the OA is very positive (70 per cent of the 22-year London Plan capacities).



KEY
 Opportunity Area
 Pipeline (Planning Datahub, May 2023). Size of circle is proportionate to the number of homes.

*[Completions](#) account for all types of supply between 2019/2020 to 2023/2024.

** [Residential Pipeline in 2023/2024](#)

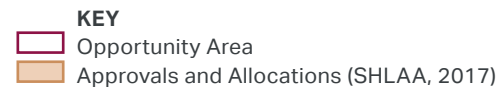
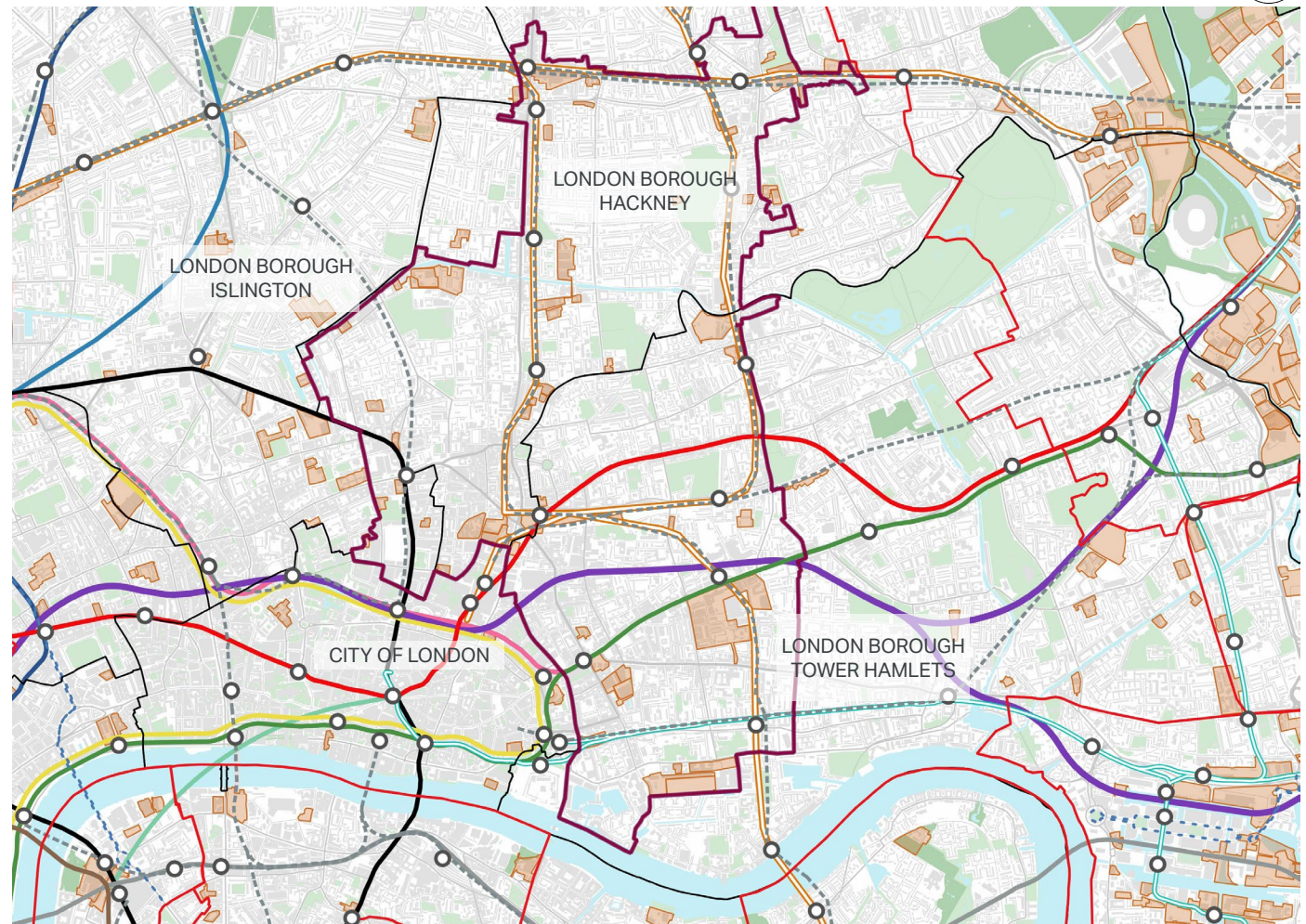


City Fringe/Tech City

SHLAA 2017: Approvals and allocations

The sites that were identified in SHLAA 2017 are shown on the map.

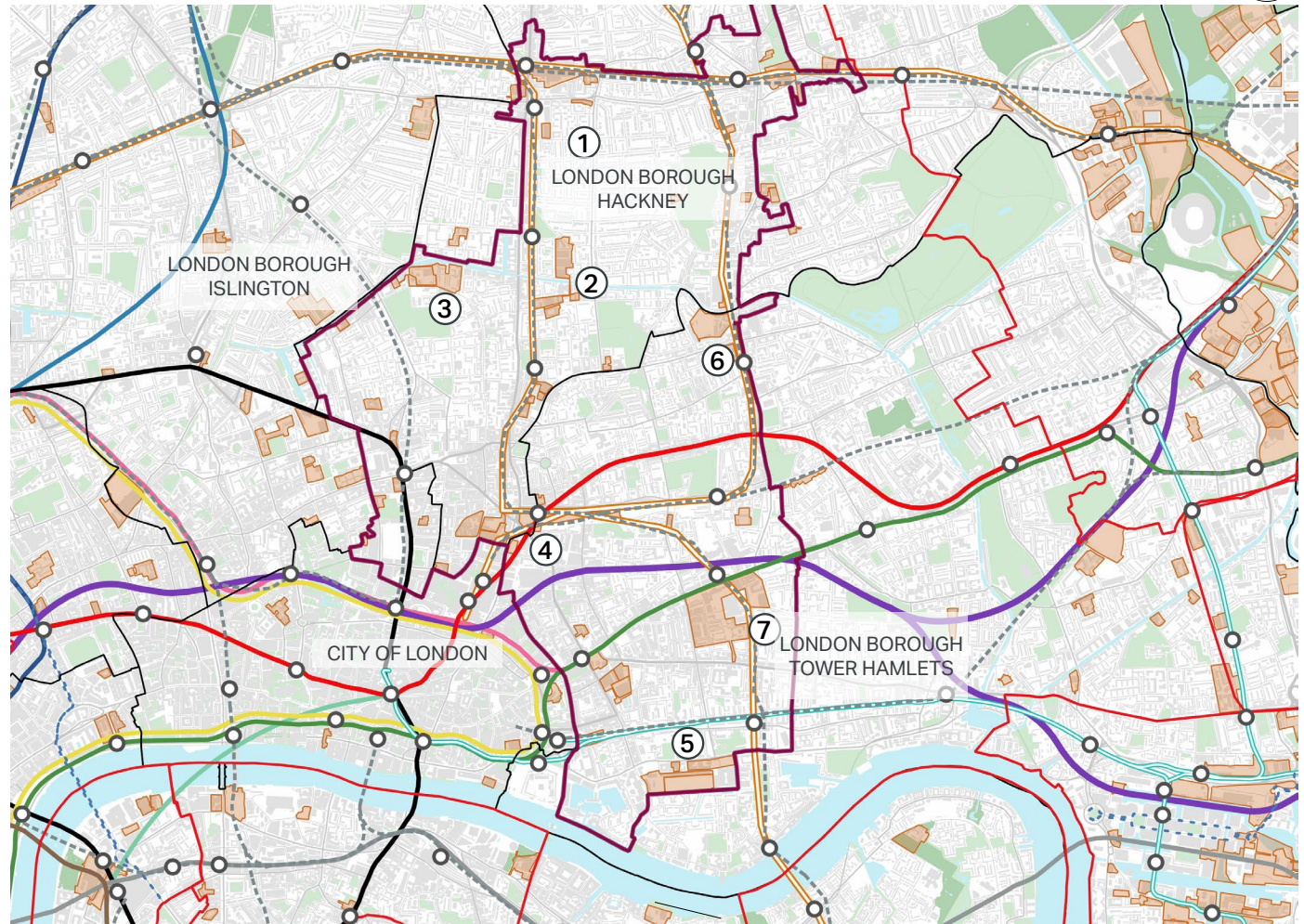
- Several sites have been approved across the OA.
- Majority of the low probability sites identified in the OA in 2017 were in Tower Hamlets and Islington.



City Fringe/Tech City

SHLAA 2017: Approvals and allocations

- ① **Kingsland Shopping Centre:** 257 residential units proposed.
- ② **Haggerston West Estate & Kingsland Estate:** Approval granted in 2008 for 761 units - delivered.
- ③ **Colville Estates:** Approval granted to Hackney Council in 2012 for 925 homes - 448 delivered. Currently in Phase 4-7 of masterplan.



KEY
 Opportunity Area
 Approvals and Allocations (SHLAA, 2017)

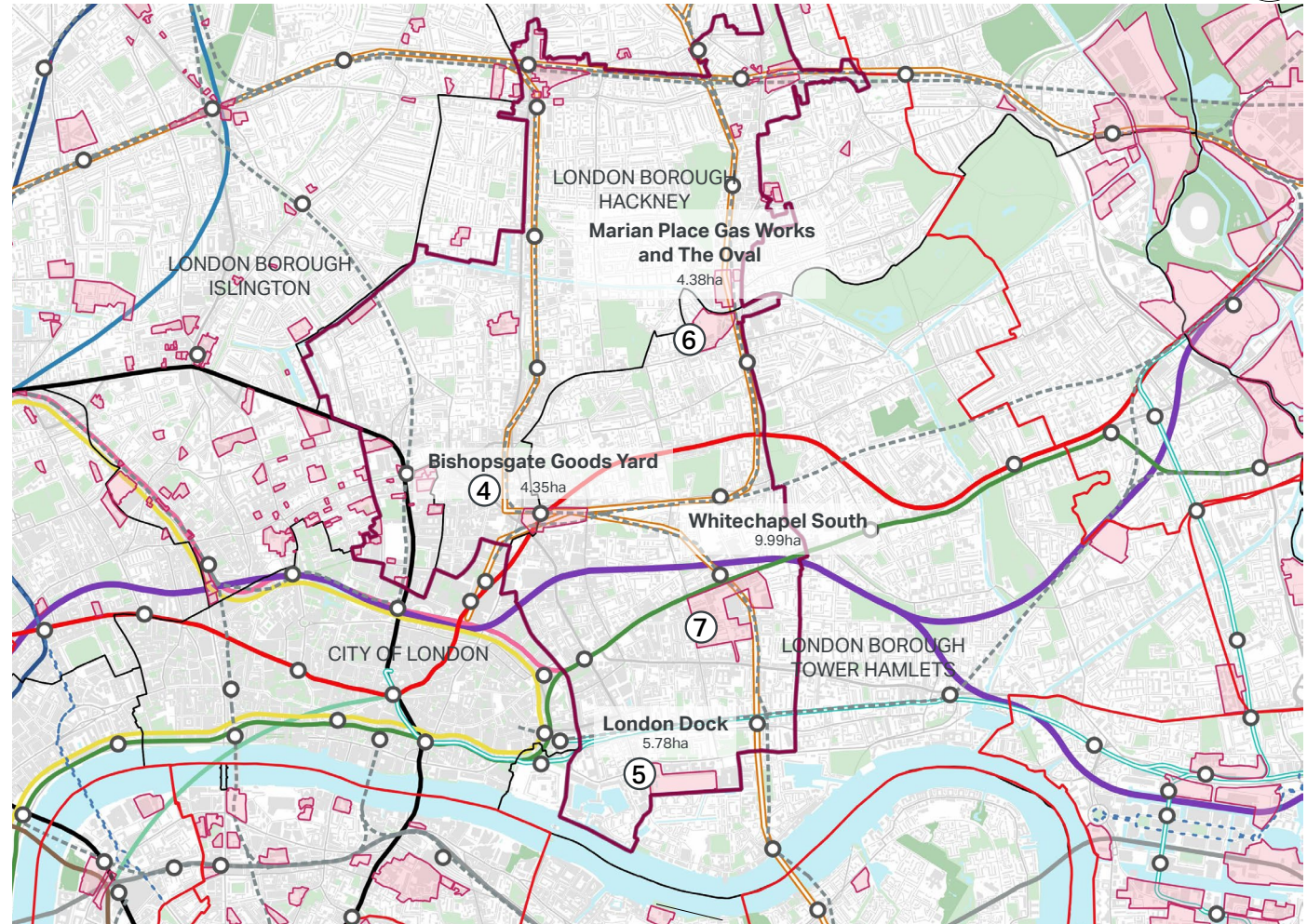
City Fringe/Tech City

Site allocations: Tower Hamlets Local Plan 2031 (2020)

The current LB Tower Hamlets Local Plan 2031 was adopted in 2020.

The site allocations in the OA as per the current local plan are shown in the adjacent map.

- ④ **Bishopsgate Goods Yard:** 500 homes, mixed use, phased construction to be completed in 2034.
- ⑤ **London Dock:** 1800 homes. Approved in 2014. Phased construction to be completed in 2029.
- ⑥ **Marian Place Gasholder:** 555 homes. Approved in 2022.
- ⑦ **Whitechapel South:** 343 homes and 168 C2 accommodation. Approved in 2016



KEY
Site allocation - LB Tower Hamlets

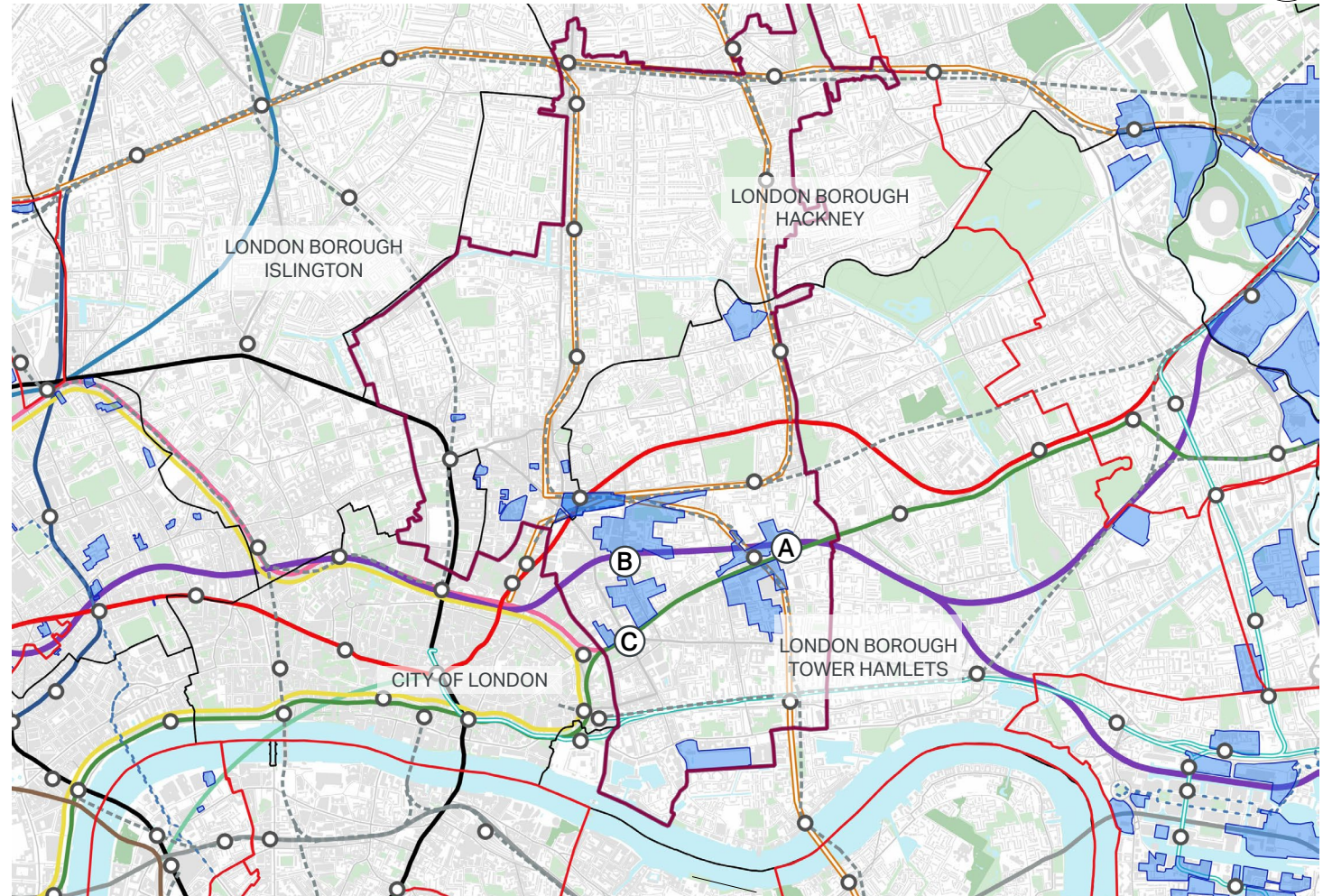
City Fringe/Tech City

Site allocations: Tower Hamlets Local Plan (Regulation 19)

A final draft of the new Local Plan is under Regulation 19 and set to be adopted in Winter 2025.

New additional site allocations in the draft plan include:

- Ⓐ **Whitechapel North:** Indicative capacity of 1,225 homes. This was considered a *'Potential Development'* site in the SHLAA 2017
- Ⓑ **Brick Lane and Pedley Street:** Commercial use. Approved in 2021
- Ⓒ **London Metropolitan University:** Indicative capacity of 520 student rooms.



City Fringe/Tech City

Development activity 2021



Source: vu.city

KEY

- Consented
- Under Construction
- Completed
- Opportunity Area

City Fringe/Tech City

Development activity 2024



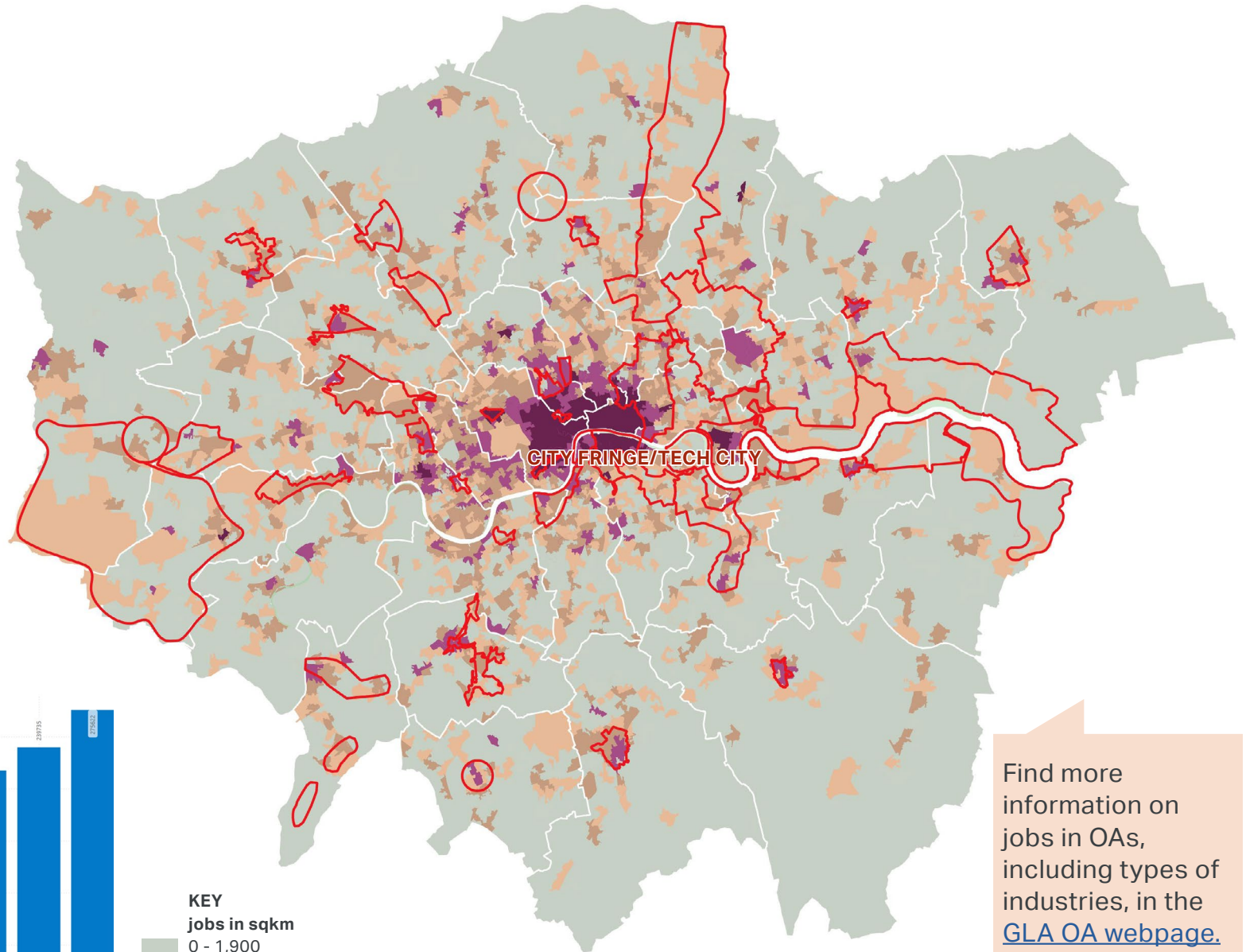
Source: vu.city

KEY

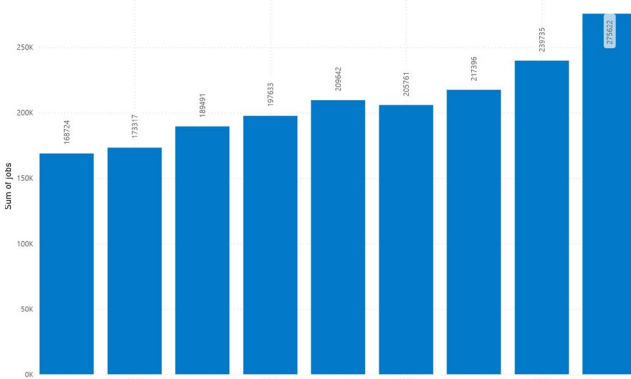
- Consented
- Under Construction
- Completed
- Opportunity Area

City Fringe/Tech City Jobs

- High jobs density in the west and south of the OA and around the locations of the district town centres.
- Positive trend in number of jobs.
- In 2023, there were 275,622 jobs in City Fringe/Tech City OA.



Jobs by year in the OA



Source: Census, Business Register

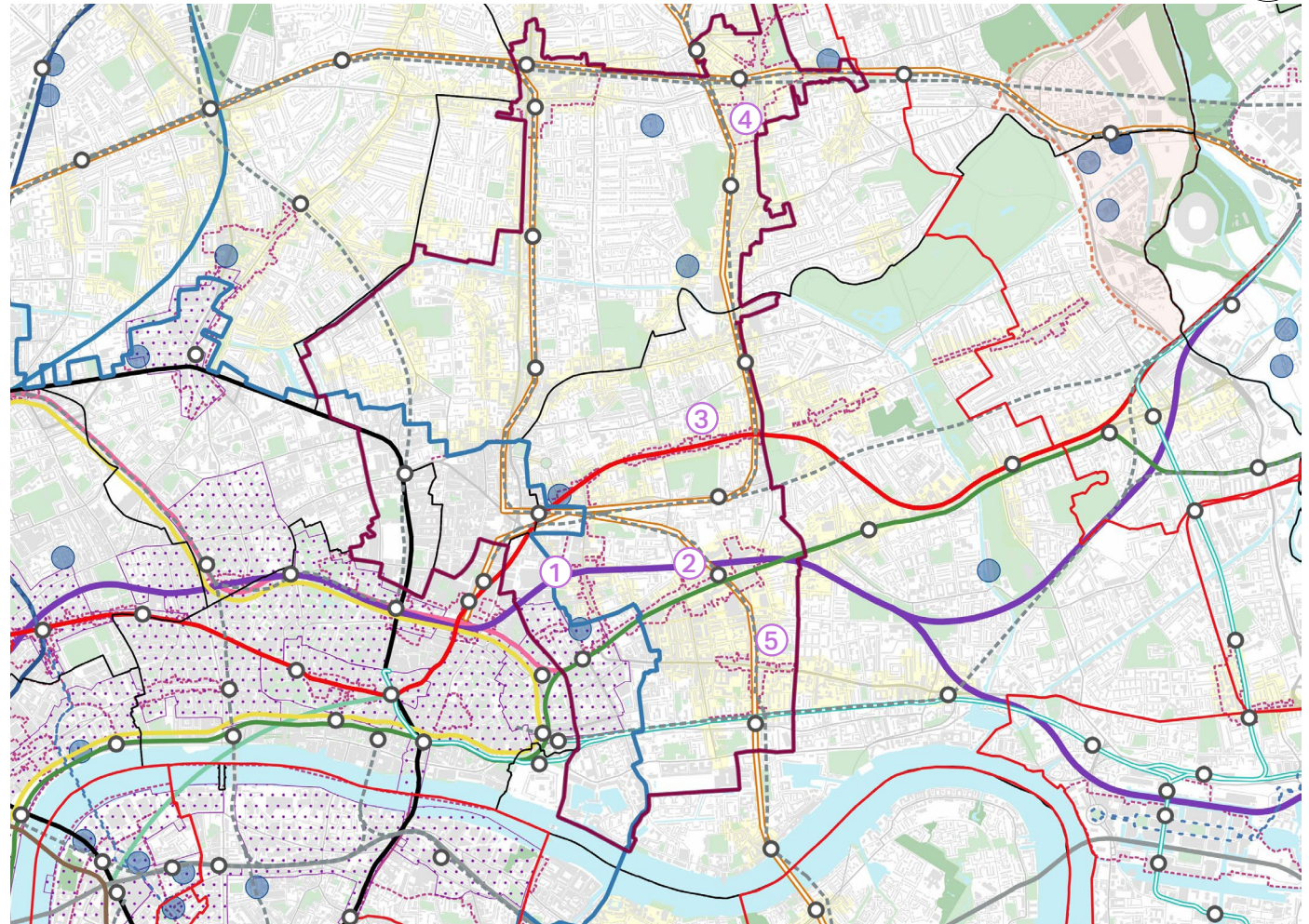
KEY
jobs in sqkm
 0 - 1,900
 1,900 - 4,000
 4,000 - 13,000
 13,000 - 60,000
 above 60,000

Find more information on jobs in OAs, including types of industries, in the [GLA OA webpage](#).

City Fringe/Tech City

Town Centre and High Streets

- The OA comprises of a number of **District Town Centres** shown on the map, including:
 1. Brick Lane
 2. Whitechapel
 3. Bethnal Green
 4. Hackney Central
 5. Watney Market
- Islington, Tower Hamlets and Hackney CAZ are within the OA boundary to the west.

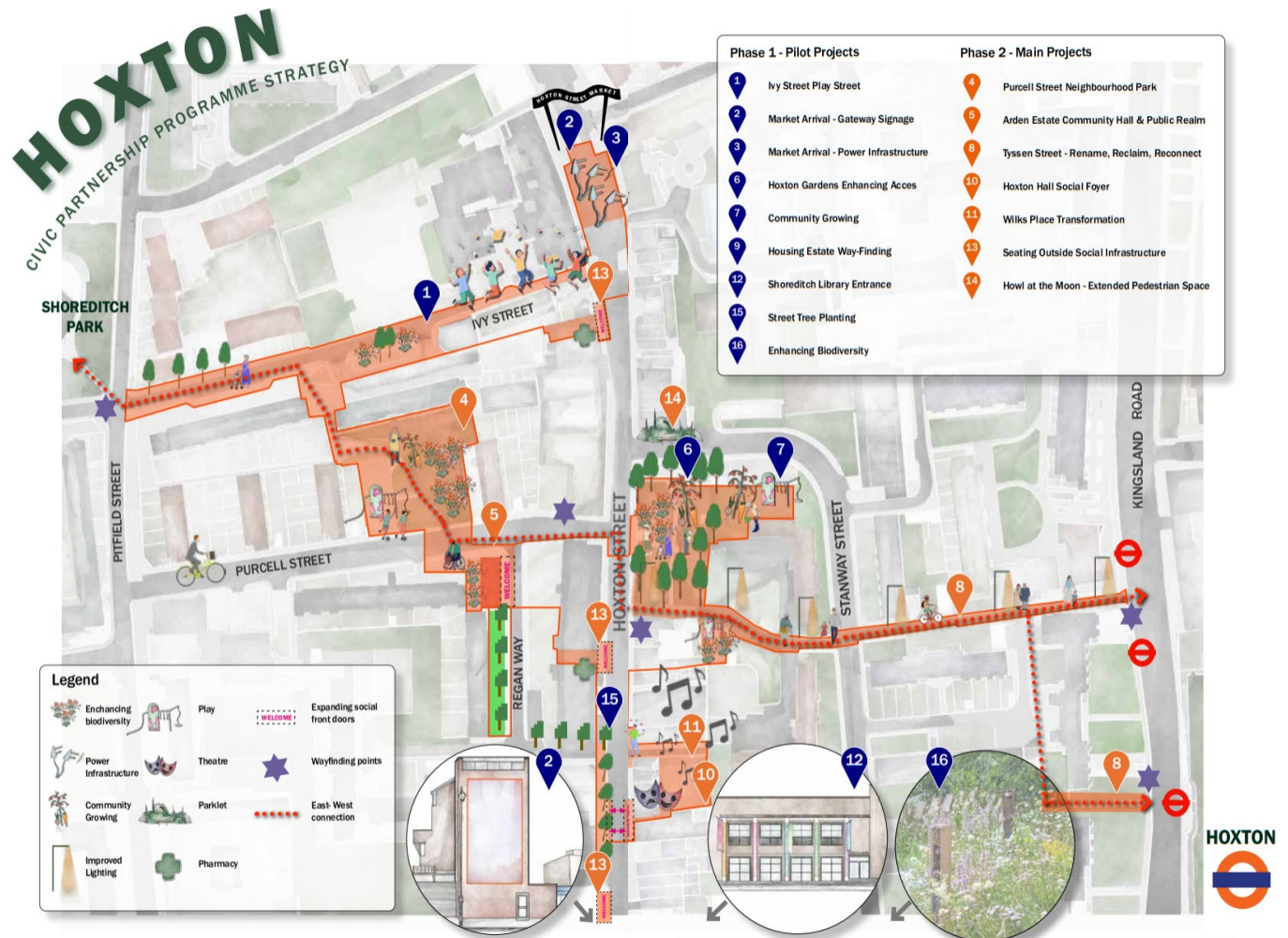


City Fringe/Tech City

Place strategies: Civic Partnership Programme

Connecting Hoxton

- The Hoxton CPP strategy 'Connecting Hoxton' is a shared vision by residents, local businesses and community and cultural organisations in partnership with LB Hackney to create a better connected social infrastructure network.
- The strategy aims to address local aspirations for a co-designed, more inclusive approach to change in the area by;
 - Improving social facilities provided for young people (16-25 year olds) and older people (65+) around Hoxton Street
 - Enhancing the public realm
 - Connecting its rich network of community assets
- LB Hackney has held several co-design workshops with locals, engagement sessions to discuss opportunities for local improvement and will continue consulting on the projects over the next two years.



Source: [Connecting Hoxton, Hoxton Civic Partnership Programme, Erect Architecture](#)

City Fringe/Tech City

Moving forward

Homes Delivery

- There are a number of opportunity sites allocated within the OA. to accommodate housing growth.
- Fast delivery: annual delivery rate/ha is above the London OA average rate and exceeding the London Plan indicative capacity for the OA.
- The OA has a relatively high pipeline more than 5,000 new homes.
- When adding the completions and the current pipeline, the performance of the OA is more positive.

Economy

- Positive trend in jobs.

Medium term opportunities

- One successful Civic Partnership Programme (CPP) in Hackney (Connecting Hoxton).
- The project in Hoxton aims to significantly improve East-West connections across Hoxton as well as improving wellbeing, sense of belonging and reducing social isolation for local people.

Proposition

- The OA to be moved from 'underway' to 'maturing'.
- OA boundary could be informed depending on the CAZ boundary.
- Opportunity for improved connectivity with the CPP project (local connectivity, and access to open space and social infrastructure).



Bishopsgate Goods Yard