

# Opportunity Area Portrait

## Southall



# 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 Towards a new London Plan 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.

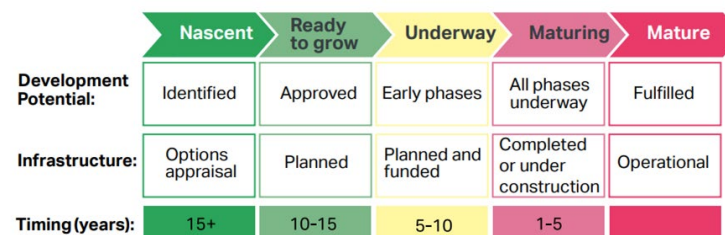
#### OA boundaries

- 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

Context

Key info

Transport  
and  
connectivity

Delivery of  
homes

SHLAA 2017

Site  
allocations

Development  
activity 2021  
and 2024

Jobs

Town Centre  
and High  
Streets

Industrial  
Land

Place  
strategies\*

Moving  
forward

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

# Southall

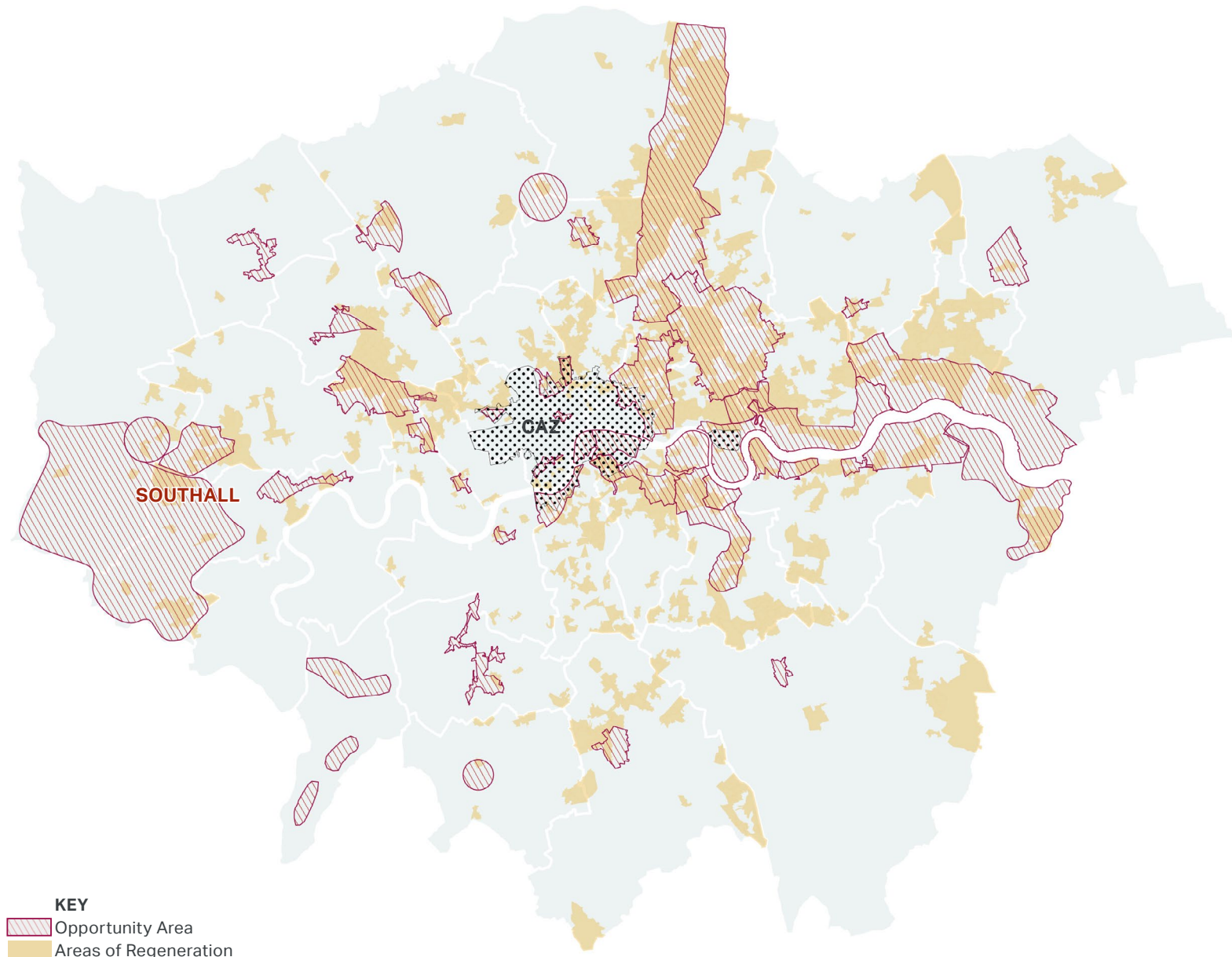
## Context

### OAs in the CAZ

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

### Areas of Regeneration

The Southall OA overlaps with several areas of regeneration.

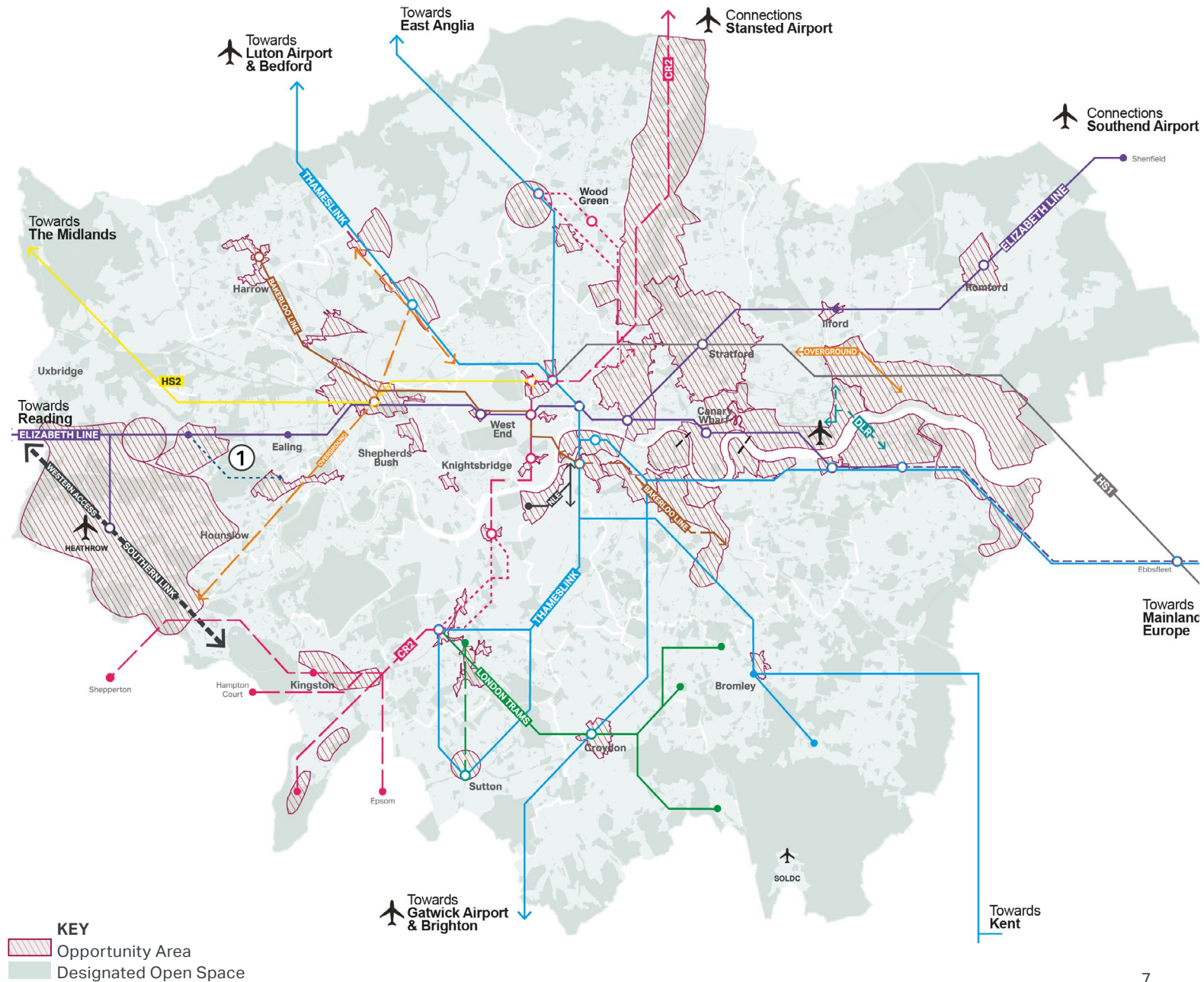


Source: Areas of Regeneration as per London Plan 2021

# Southall Context

## Transport and Growth Corridors

- Southall OA sits within the **Heathrow/Elizabeth line** corridor and benefits from the Elizabeth Line.
- ① The OA is set to benefit from the potential Southall to Brentford rail link shown on the map.



Source: Planning Data map



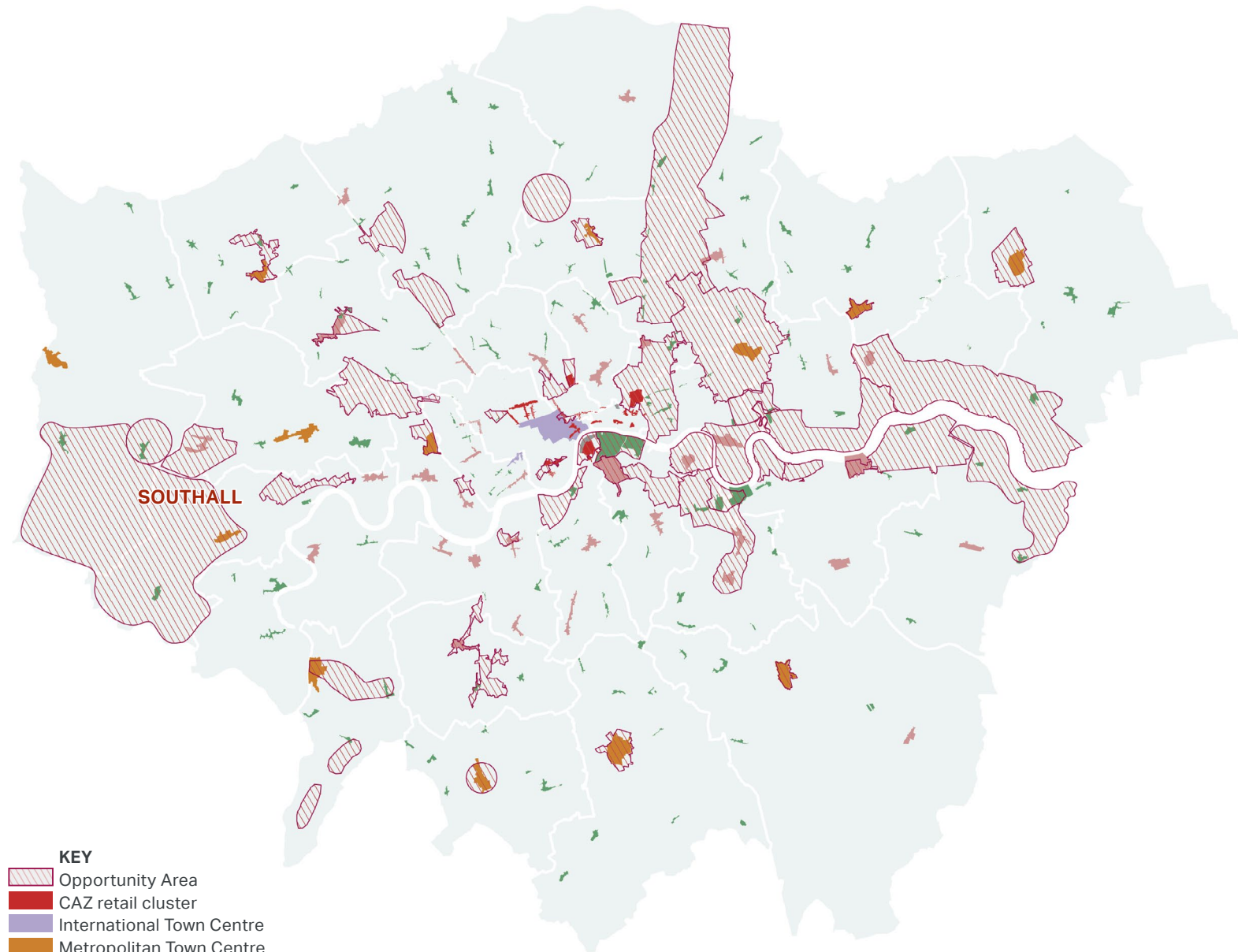
# Southall

## 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)

Southall OA has an adopted boundary. The boundary comprises of **one Major Town Centre**.



**KEY**

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

Source: Planning Data map



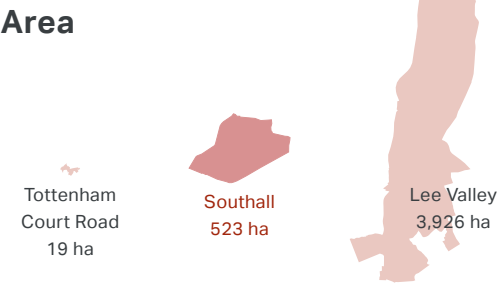
# Southall

## Key info

### London Plan Designation Year

2004	2008	2011	2016	2021
------	------	------	------	------

**Borough**  
LB Ealing



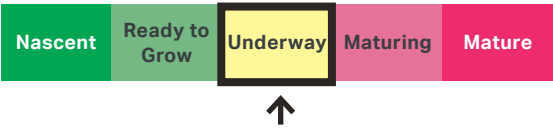
**OA specific plans**  
Southall OAPF (2014)

**Local Plan status**  
Regulation 22 - submission and examination

**Growth Corridor**  
Heathrow/Elizabeth Line West

**Housing Delivery Test 2023**  
Buffer

### OA status (London Plan 2021)



London Plan 2021 capacities by 2041



Source: Google Earth

**KEY**  
Opportunity Area

\*Note that the LESD (2021) increased the capacity to 5,400 new jobs

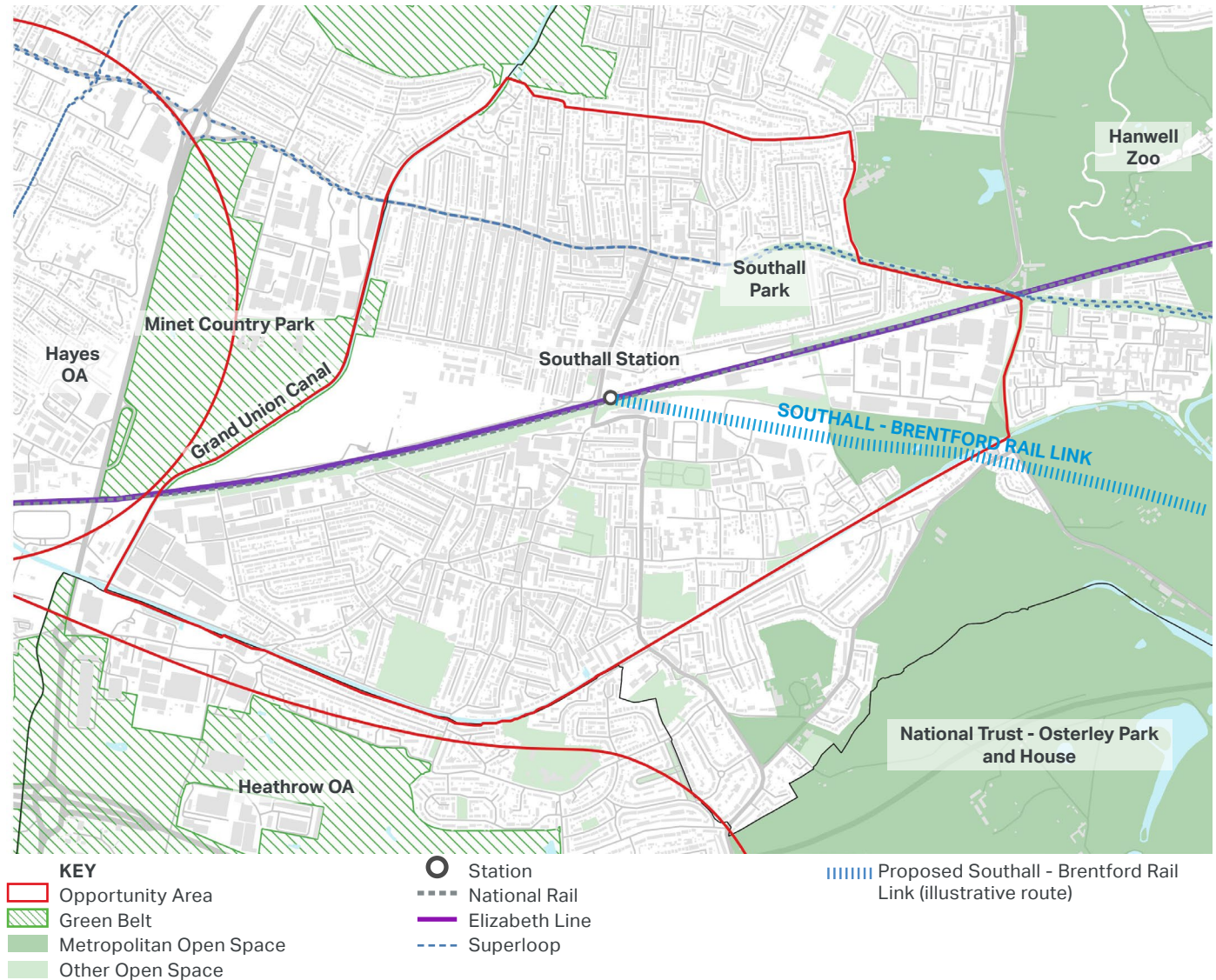


# Southall

## Transport and connectivity



- TfL is currently working with the borough to scope developing a transport strategy for Southall OA.
- TfL is considering undertaking a local connection study of Southall to deliver a united transport vision for Ealing.
- Key areas for the study would include looking at the Green Quarter, East Southall transport coordination, Southall bus strategy and Southall walking and cycling strategy.

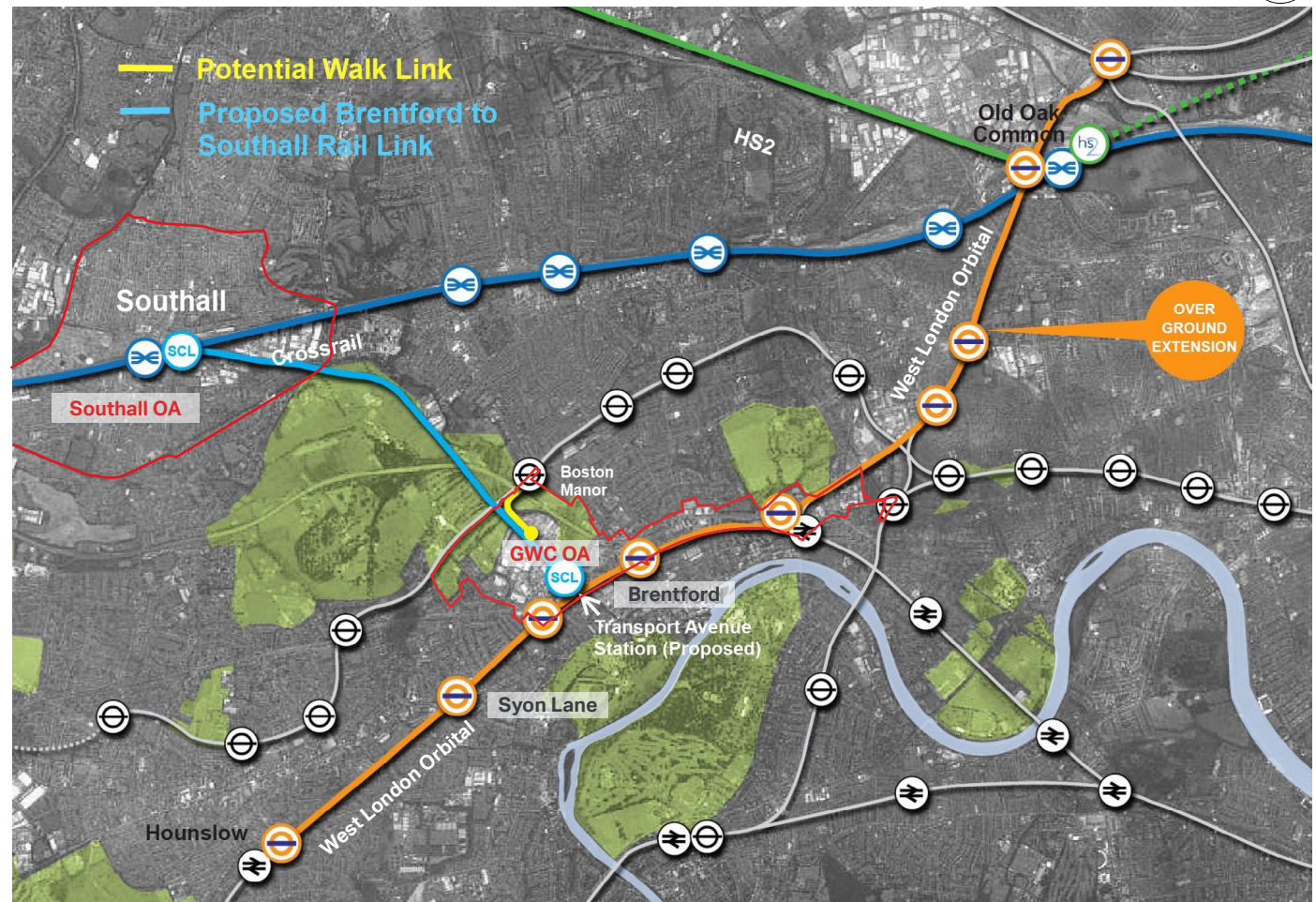




# Southall

## Transport and connectivity: Southall to Brentford Rail Link

- The draft Hounslow Local Plan (Reg 19) spatial strategy promotes the provision of major public transport improvements including new links from the Elizabeth Line at Southall Station connecting to the new Golden Mile Station on the Great West Road, as well as the West London Orbital Line serving Brentford, Lionel Road and Syon Lane stations.



Source: [London Borough of Hounslow - Southern Rail Link](#)

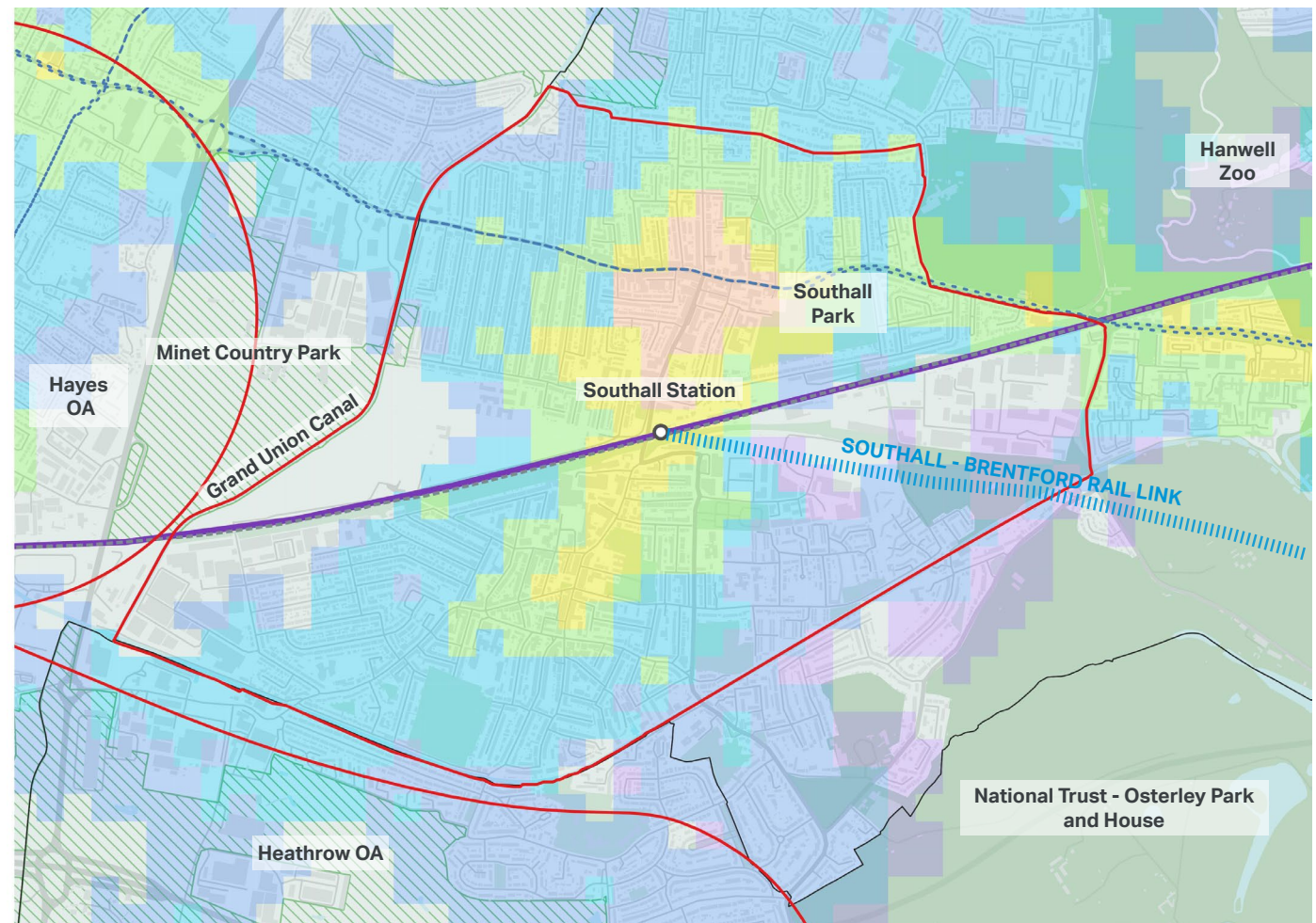
**KEY**  
Opportunity Area

# Southall

## Transport and connectivity: PTAL 2031



- Elizabeth Line was the most recent key transport intervention in the OA.
- Stakeholder interviews in Southall as part of TfL's Elizabeth Line evaluation programme indicate that the line contributed to:
  - Increased major residential development sites in Southall
  - Increased presence of young professionals living in the area
  - Better access to jobs and education, both in central London and further out to sub-markets like Reading.
- Stakeholders expressed concern of:
  - Southall becoming a 'dormitory town' if new developments are not coupled with better connectivity.
  - The need for further public realm investment.
  - Limited effects on car travel patterns in the area, as well as to the number of night-workers getting to Heathrow.



Source: Transport For London

### KEY

- 0 (worst)
- 1a
- 1b

- 2
- 3
- 4
- 5

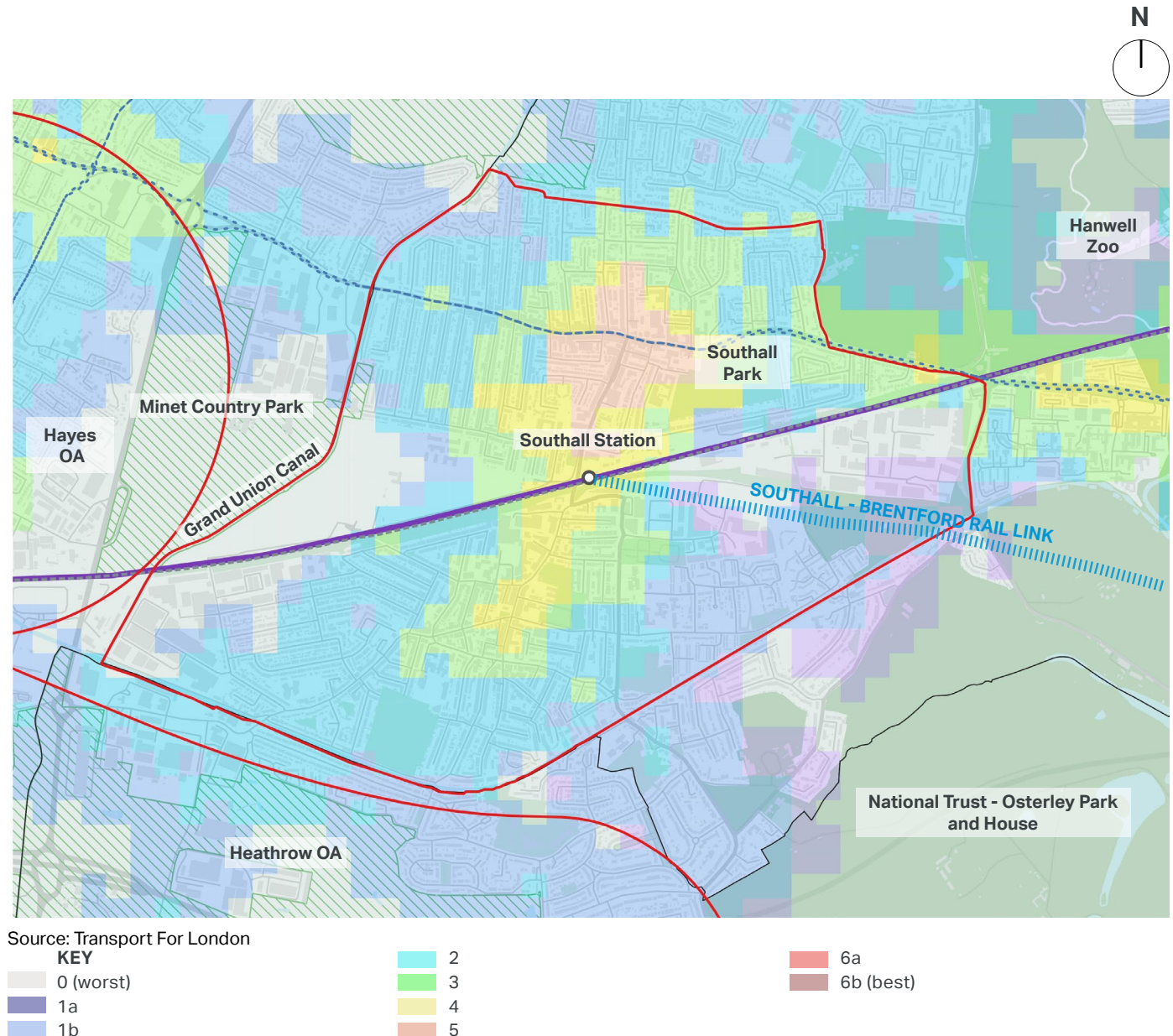
- 6a
- 6b (best)



# Southall

## Transport and connectivity: PTAL 2031

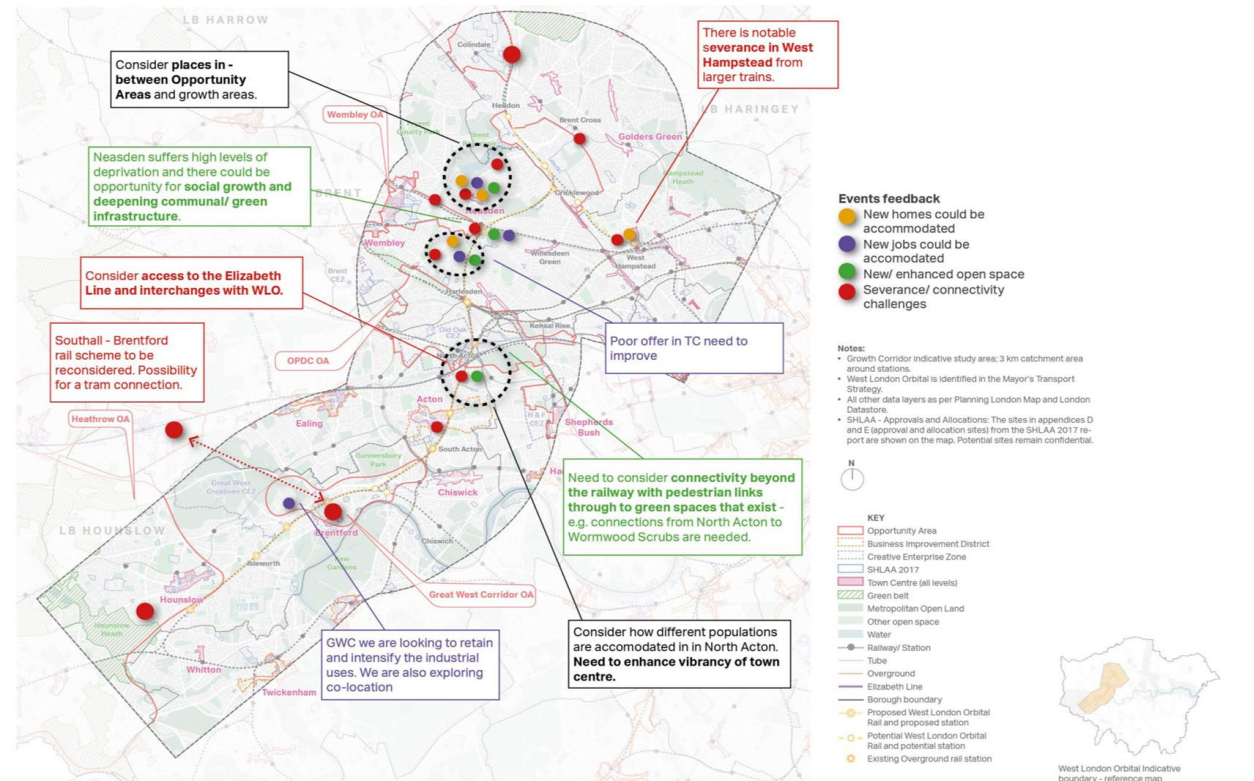
- Highest PTAL in the OA are forecast to be experienced along the high street to the north of the railway line, on South Road and The Broadway that are served by several bus stops.
- Only TfL's committed and funded public transport network schemes are considered in this scenario.



# Southall

## Transport and connectivity: Growth Corridor Engagement

- Participants in the Planning for London Programme stakeholder engagement for the West London Orbital Growth Corridor raised:
- Possibility for the Southall-Brentford rail scheme be reconsidered for a tram connection.
- The summary is available via [this](#) link.





# Southall

## Delivery of homes

### Delivery pre - 2019

Completions since designation against capacity

LP 2011	4,000
LP 2016	6,000
Completed	916

The OA delivered below indicative capacity (23 per cent of indicative capacity at designation) at rate of 115 completions a year pre-2019.

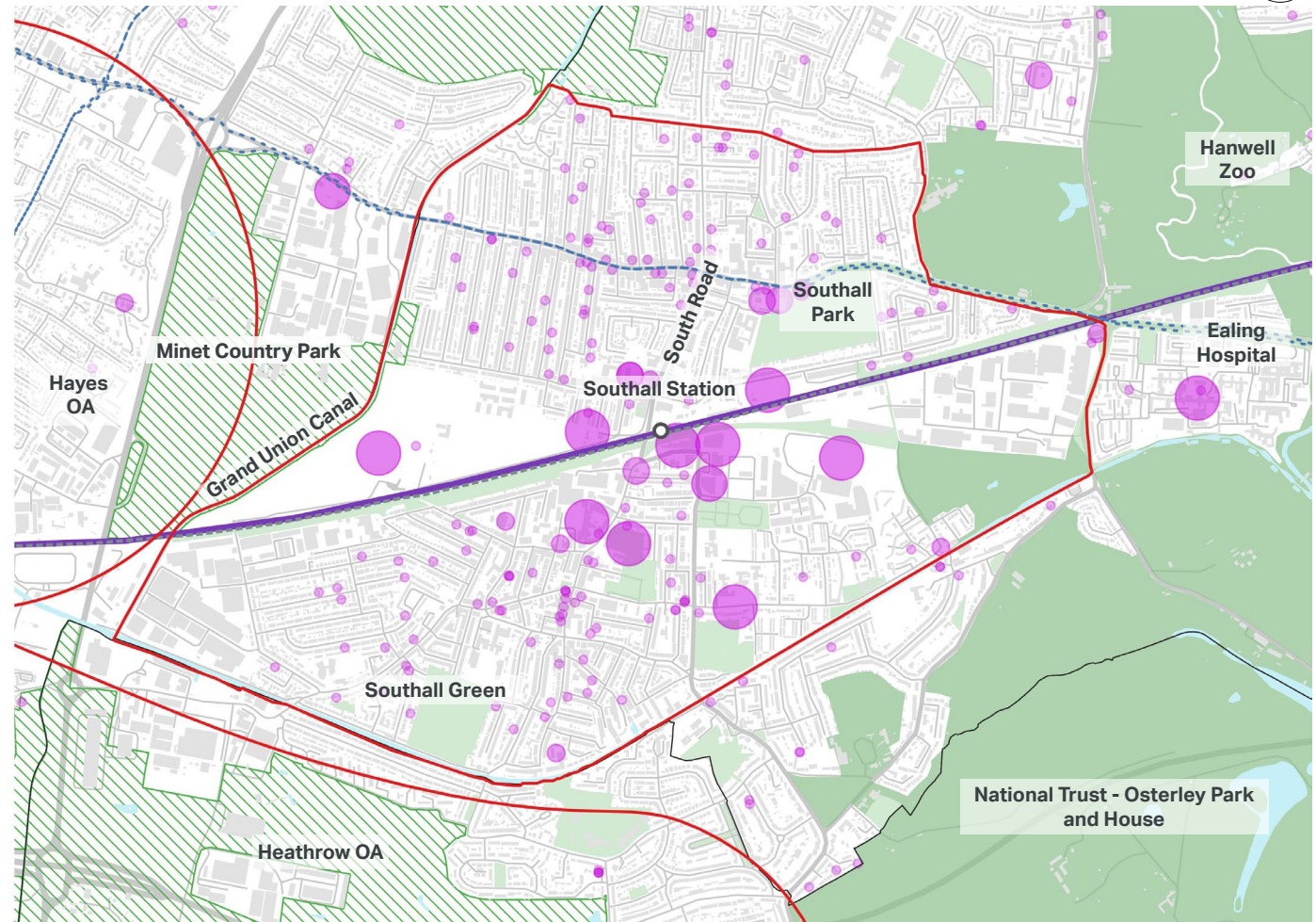
### Delivery post - 2019 (London Plan 2021)

Progress against 22yr, 10 yr capacity

22 yr	9,000
10 yr	7,024
Completed	768
Pipeline	9,779

Considering the completions alone, the OA has met 10 per cent of its 10-year indicative homes capacity and 8 per cent of its 22-year indicative capacity.

When adding the completions and the current pipeline, the performance of the OA is very positive (128 per cent of the 22-year London Plan capacities, and 164 per cent of the 10-year).



**KEY**  
 [Red outline] Opportunity Area  
 [Purple circle] 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](#)

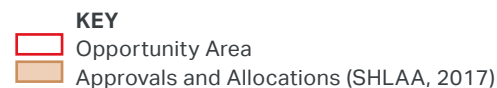
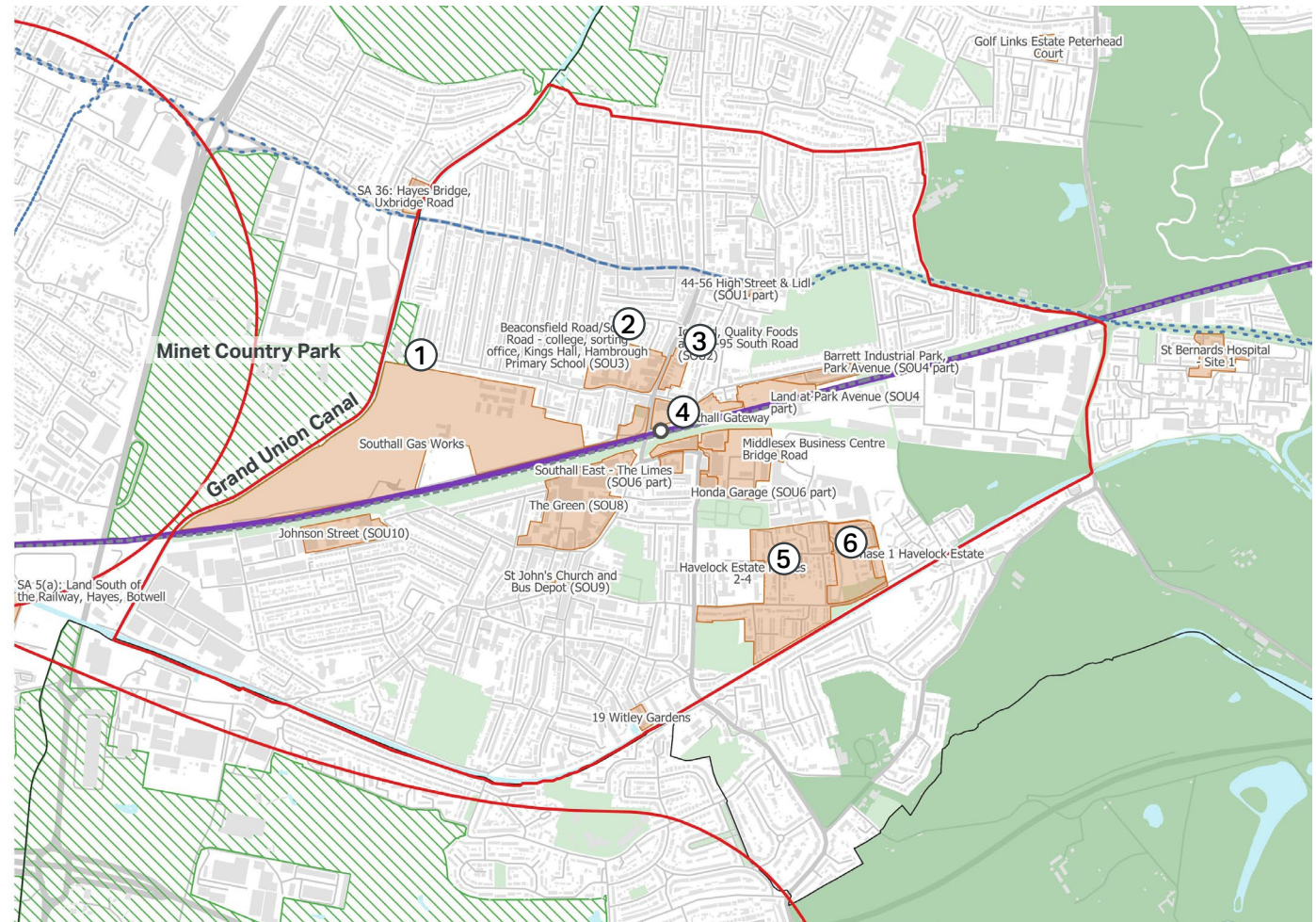
# Southall

## SHLAA 2017: Approvals and allocations



The sites that were identified within the emerging OA boundary in SHLAA 2017 are shown on the map.

- Majority of the 'low probability' and 'unsuitable' sites identified in SHLAA 2017 were located on SIL to the south of the Elizabeth Line railway lines to the east of the OA.
- Some of the 'potential development' sites were LSIS in the OA.



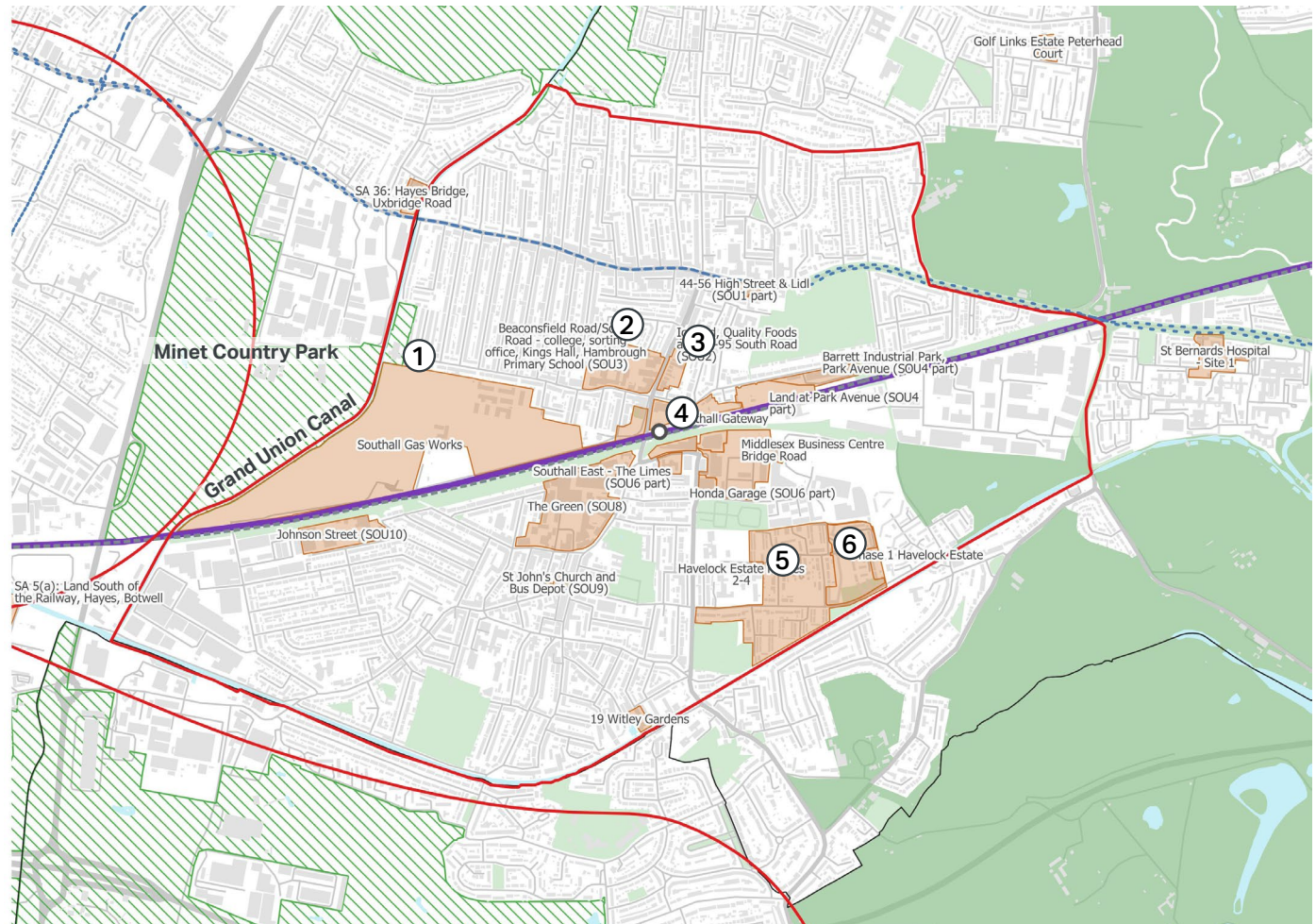


# Southall

## SHLAA 2017: Approvals and allocations

N

- ① **The Green Quarter:** 1,263 homes delivered as part of Phase 1 and 3, approval granted for 1,158 more homes.
- ② **Former Southall College:** Approval granted in 2021 for redevelopment into 118 homes -under construction
- ② **Southall Junction:** 41 homes are under construction
- ④ **Station Yard:** 516 homes under construction. Permission for 460 more homes granted as part of Southall Sidings
- ⑤ **Havelock Estate (Phase 1-4):** Approval granted in 2015 for 922 homes.
- ⑥ **Havelock Estate - Southall Village:** 287 homes delivered.



**KEY**  
 [Red Outline] Opportunity Area  
 [Orange Area] Approvals and Allocations (SHLAA, 2017)



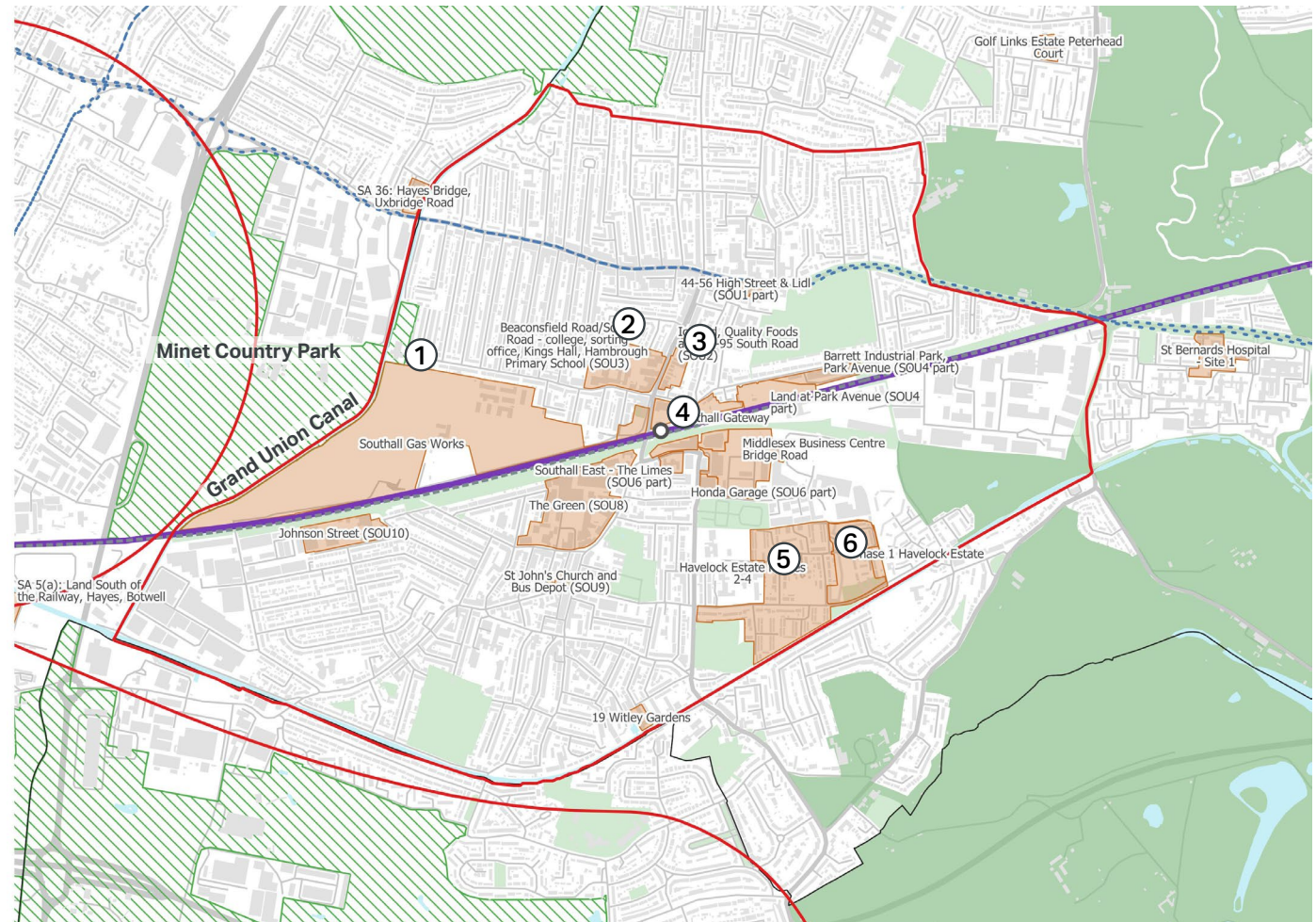
Southall Village



# Southall

## SHLAA 2017: Approvals and allocations

- ④ **Merrick Place:** 575 homes under construction as part of a 15-23 storey mixed use development.



**KEY**

- Opportunity Area
- Approvals and Allocations (SHLAA, 2017)





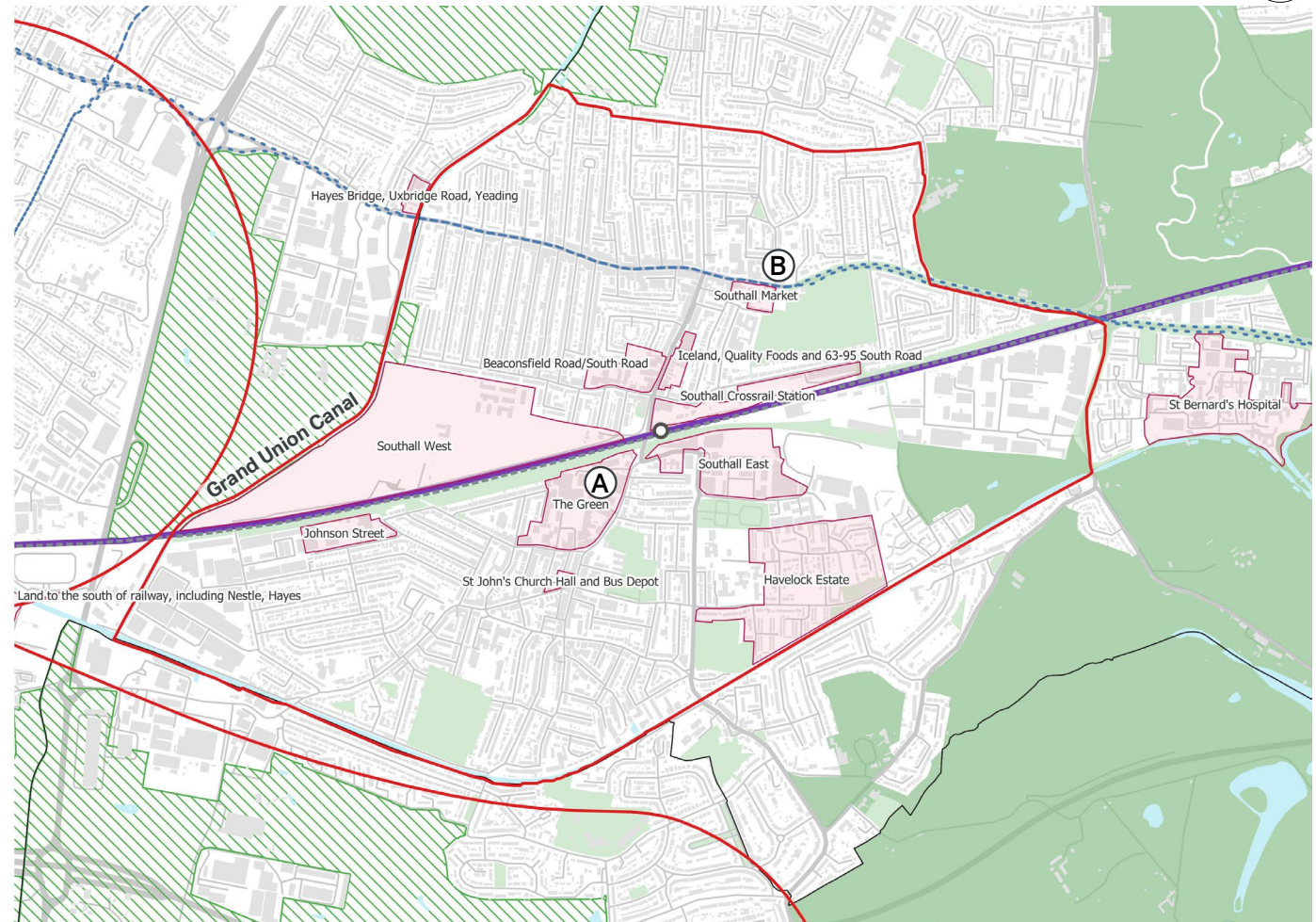
# Southall

## Site allocations: Ealing Local Plan (Regulation 19)

- Ⓐ **The Green:** 152 homes historically approved and delivered pre-2021 as part of TRS Apartments & Dover Court). Approval granted for further 736 homes.
- Ⓑ **The Cattle Market Project:** 125 homes under construction. All affordable housing
- Ⓑ **Southall Grove:** 149 homes under construction until 2026.



The Green



**KEY**  
 Site allocation - LB Ealing





# Southall

## Development activity 2021



Source: vu.city

### KEY

- Consented
- Under Construction
- Completed
- Opportunity Area



# Southall

## Development activity 2024



Source: vu.city

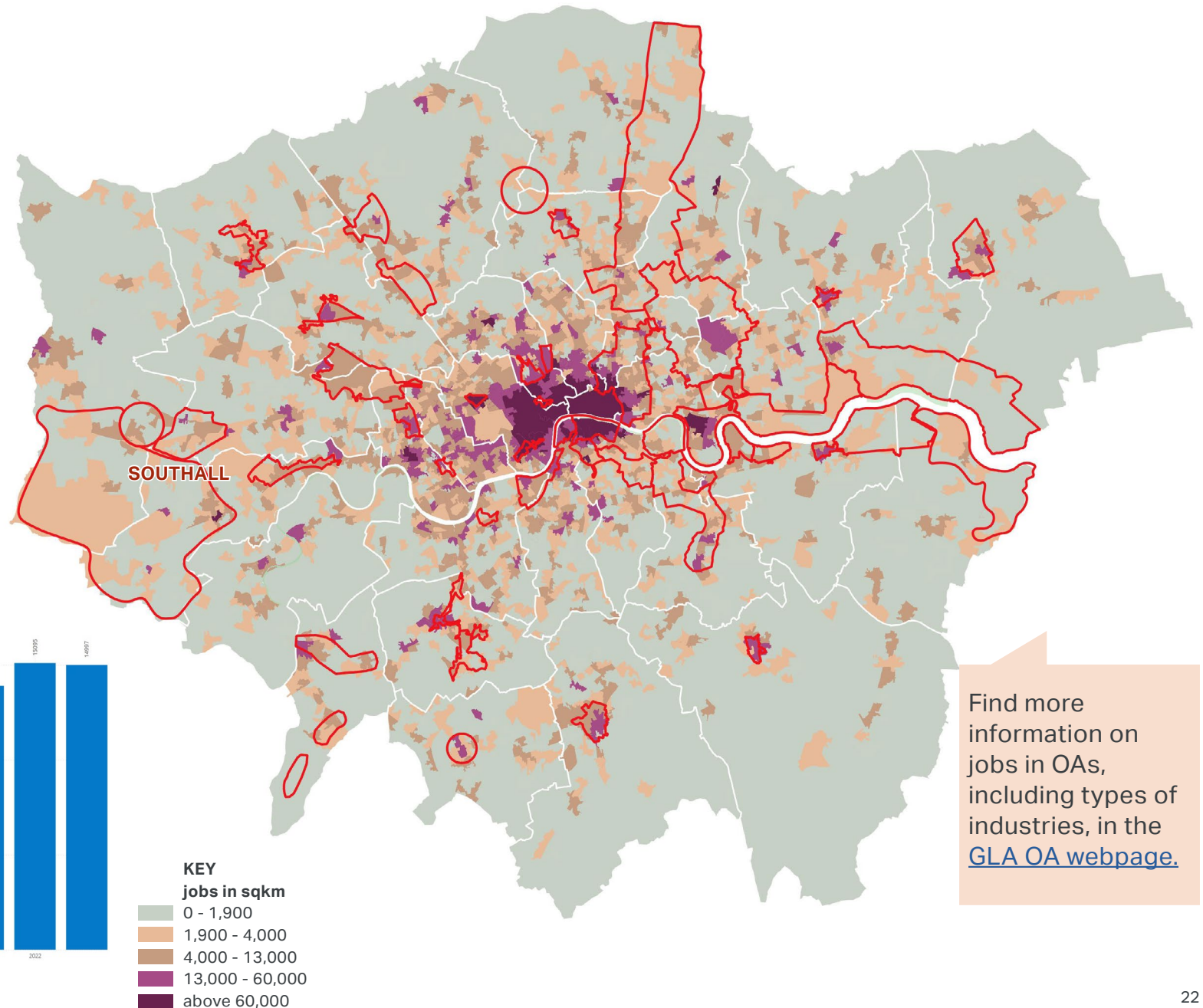
- KEY**
- Consented
  - Under Construction
  - Completed
  - Opportunity Area



# Southall

## Jobs

- Low to medium jobs density in Southall OA as shown in the map.
- In 2023, there were 14,997 jobs in the OA, which accounts for 12 per cent of the jobs in the borough.



Source: Census, Business Register



# Southall

## Town Centres and High Streets

- Southall Town Centre is a Major town centre.
- Ealing Local Plan (Regulation 19, 2024) indicates the King Street high-street area shown in the map as a town centre.
- The Green Quarter proposal:
  - Parkside Yards will offer a makers space hub encouraging employment, innovation and entrepreneurship. The units will be sized appropriately, and offered in a condition which is both accessible and affordable for local people.
  - Central Gardens in Phase 5, with the aim to extend the commercial ribbon to the canal.
  - Canalside will offer social infrastructure by providing a new primary school (3,450sqm), sports hall and have food and beverage at the water's edge.
  - The Western Gateway will be local convenience and a café to ensure all residents have a 20 minute neighbourhood.

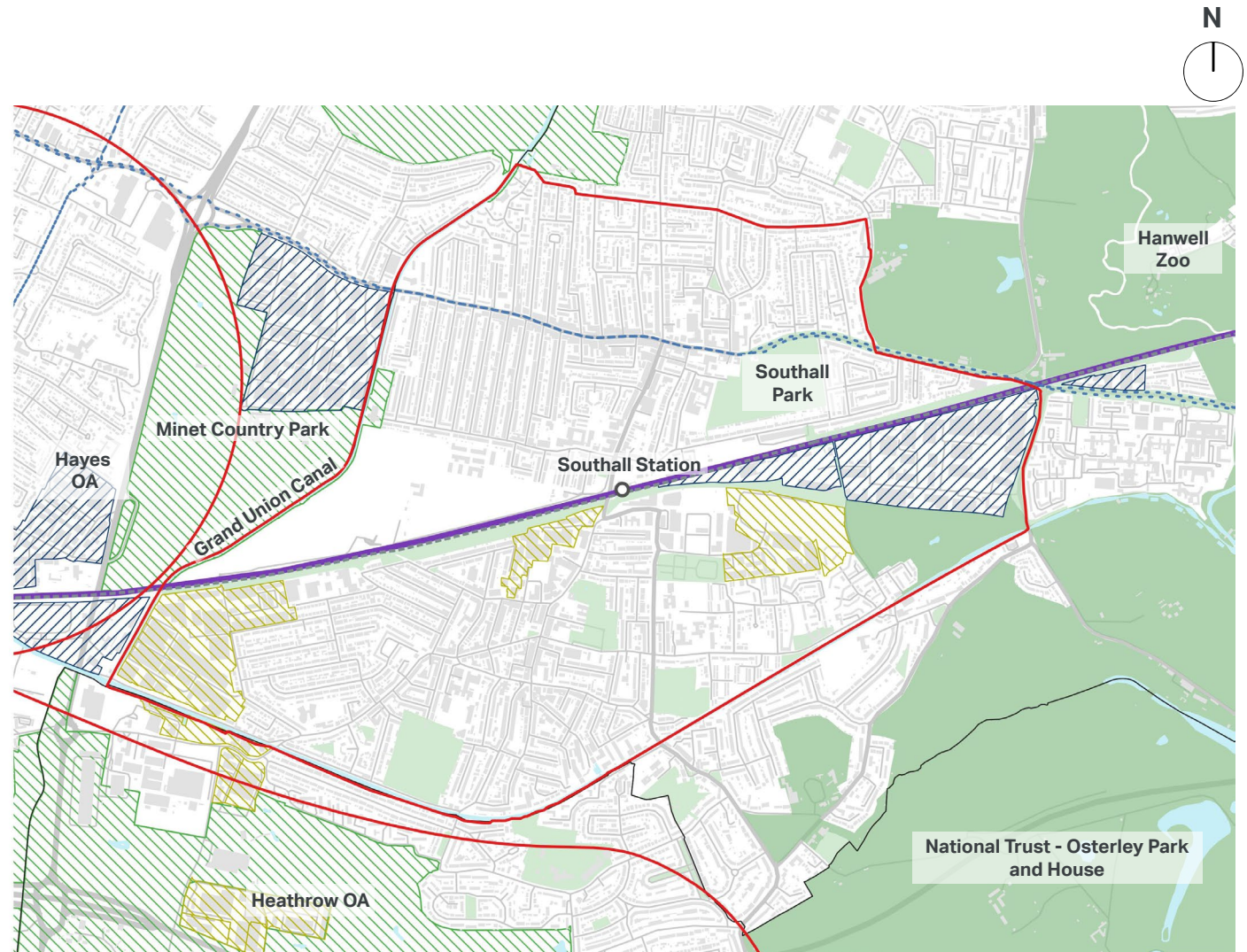




# Southall

## Protected Industrial land

- 7 per cent of the OA land is LSIS
- 6 per cent of the OA is SIL
- The Ealing Local Plan (Reg 19) reports that there is increased pressure upon Southall's industrial land due to the growth demand for homes in West London (and London as a whole).



Source: London Industrial Supply Study

**KEY**  
SIL  
LSIS



# Southall

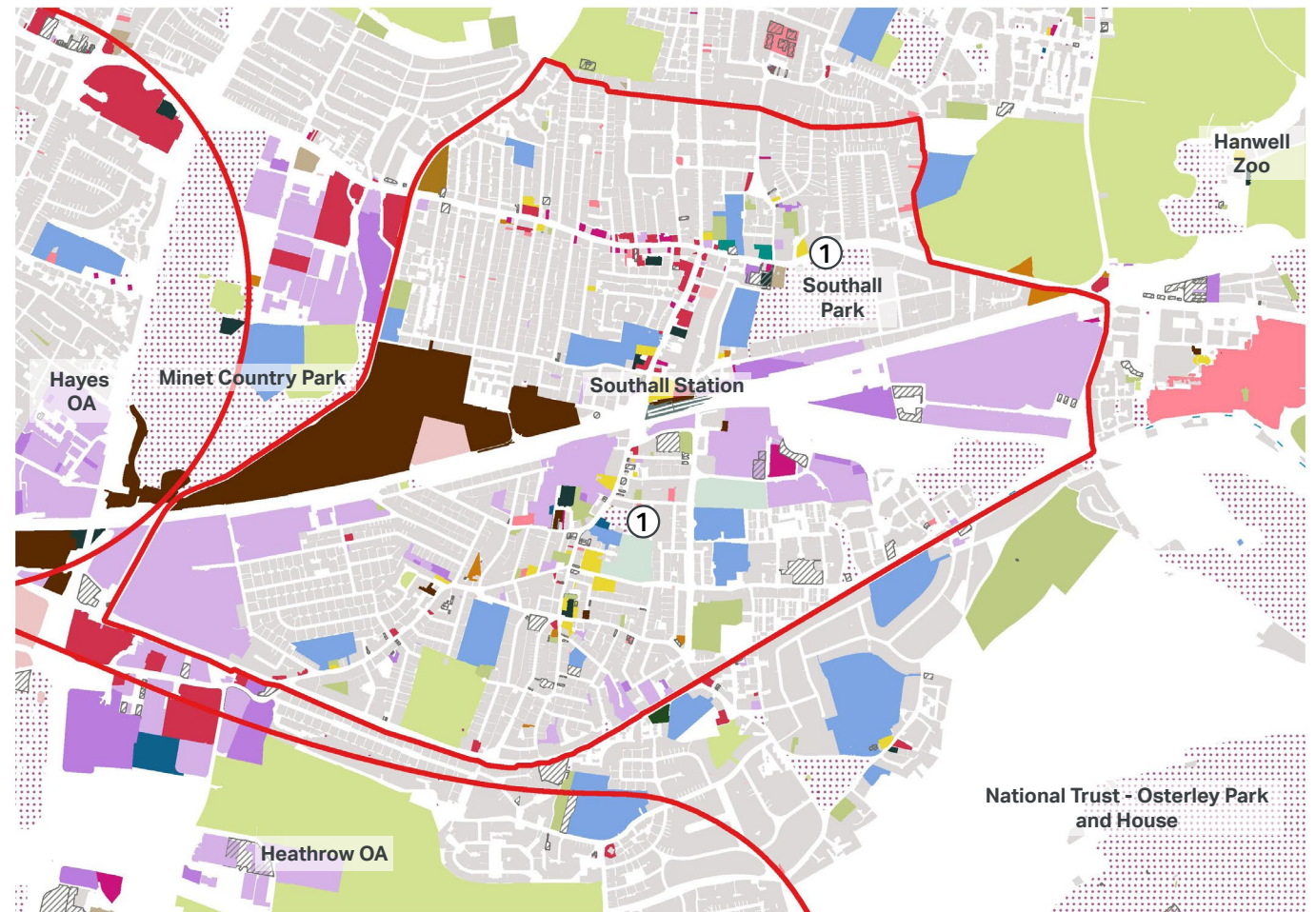
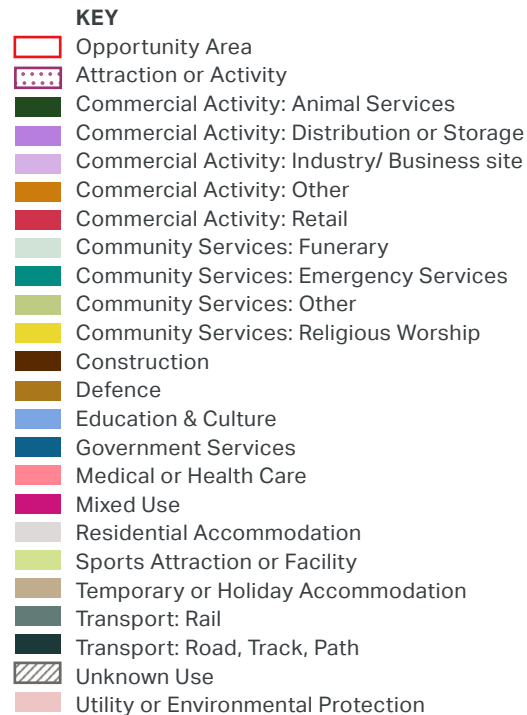
## Industrial land: Types of industry



# Southall

## Land uses

- ① There are numerous places of worships throughout Southall, many are dotted around the two high streets. With the majority of the residents from South Asian backgrounds, there is a huge diversity religions in the area including the largest Sikh gurdwara outside India.



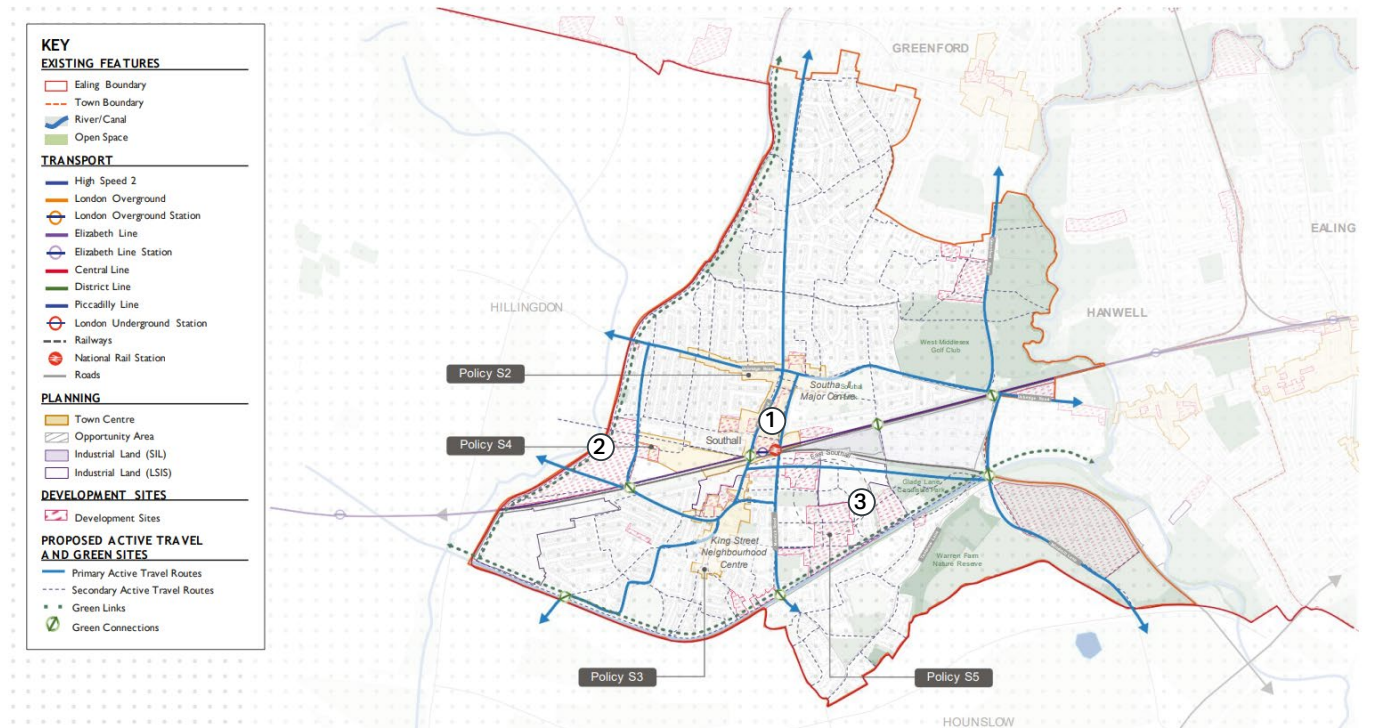
Source: OSNGB, City Intelligence Unit (GLA)



# Southall

## Place strategies: Ealing Local Plan (Regulation 19)

- There are several Strategic Areas of Regeneration in the OA.
- Opportunities to improve local connections and active travel routes to Southall station are indicated on the diagram (blue line).
- Emerging policies focus on:
  - ① Reinforcing Southall's role as a Major Centre and,
    - Ensuring effective delivery of a new neighbourhoods on the
  - ② Southall Green Quarter, and
  - ③ East Southall.



Source: Ealing Local Plan (Reg 19) (2024) Southall Spatial Strategy

# Southall

## Moving forward

### Homes Delivery

- Majority of the **sites allocated** within the OA as part of the Ealing Local Plan as well as SHLAA 2017 have been approved, are under construction or delivered.
- **Fast delivery:** When adding the completions and the current pipeline, the performance of the OA is very positive (128 per cent of the 22-year London Plan capacities, and 164 percent of the 10-year capacity).
- The OA has a **high pipeline at 9,777 new homes**. Most homes in the pipeline can be attributed to the Green Quarter Scheme and the Havelock Estate.

### Jobs

- The non-residential floorspace data suggest a significant increase in completions in the OA between 2022 and 2024.
- Employment led-growth is being prioritised in Southall according to the Ealing Local Plan (Regulation 19).

### Proposition

- Update status from 'Underway' to 'Maturing' as a lot of development in the pipeline expected to exceed indicative capacities set in LP 2021.
- Opportunities to improve active travel routes and local connections through joint GLA/TfL/Ealing working.



### Infrastructure

- TfL is currently working with the borough to scope developing a transport strategy for Southall OA.
- Changing identity in Southall is one of the local challenges that infrastructure needs to acknowledge and accommodate. Social infrastructure to acknowledge existing population and their needs.
- Opportunities to enhance green connections and create a network that brings together the Grand Union Canal, Mint County Park and South Road.
- The site sits within the West London area currently affected by electricity capacity constraints. There is scope for early engagement with the electrical distribution and transmission networks to better align investment programmes with the development timelines.