

# Opportunity Area Portrait

## King's Cross



# 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.

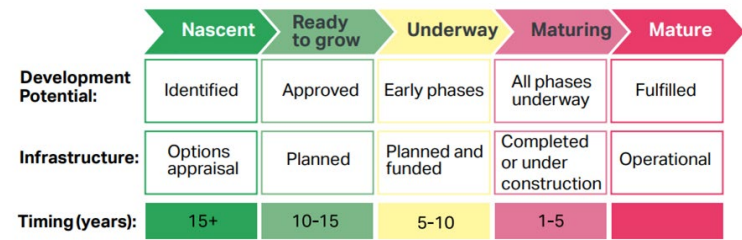
#### OA boundaries

- 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

Meanwhile  
uses

Moving  
forward

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

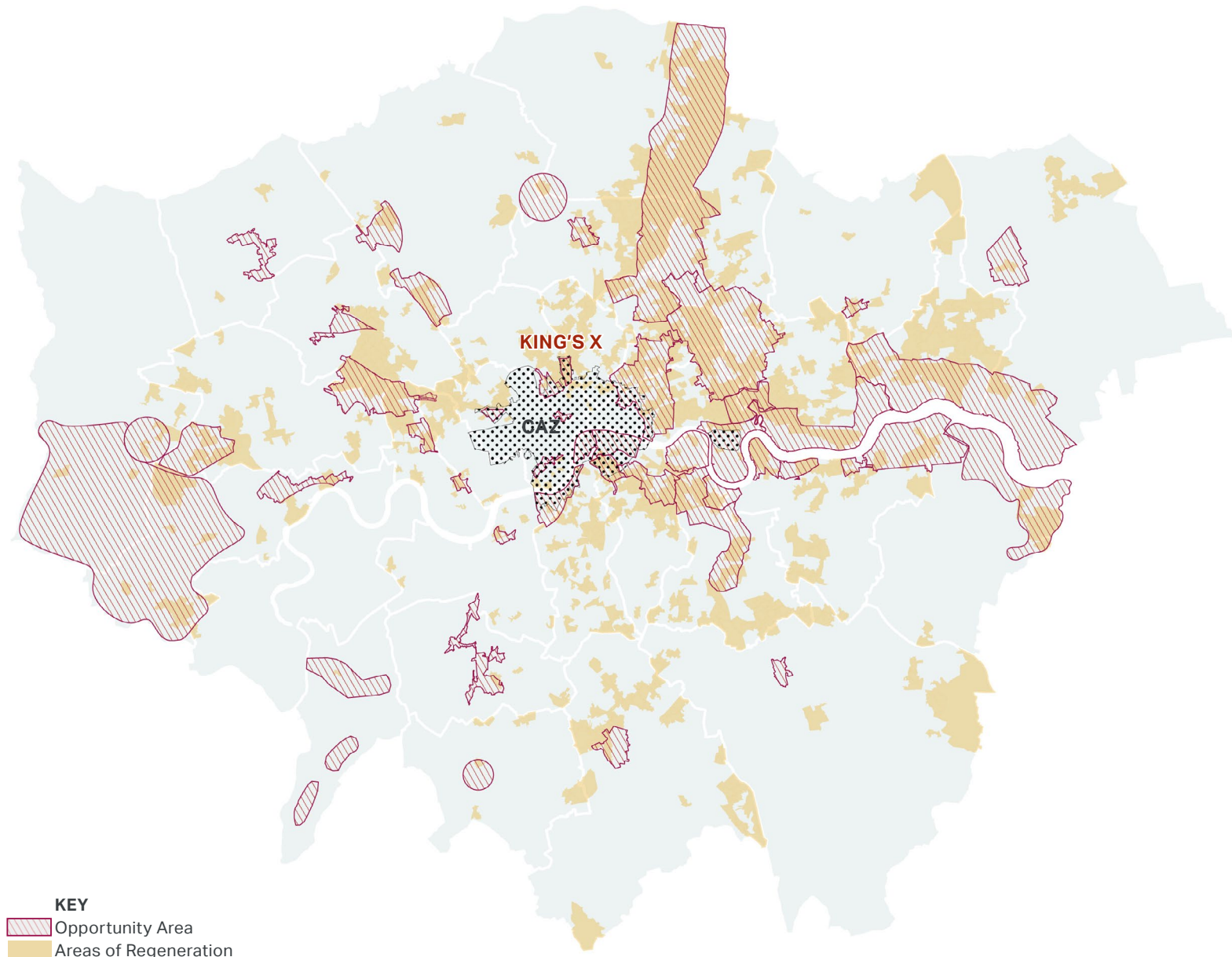
# King's Cross Context

## 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

OA overlaps with areas of regeneration.

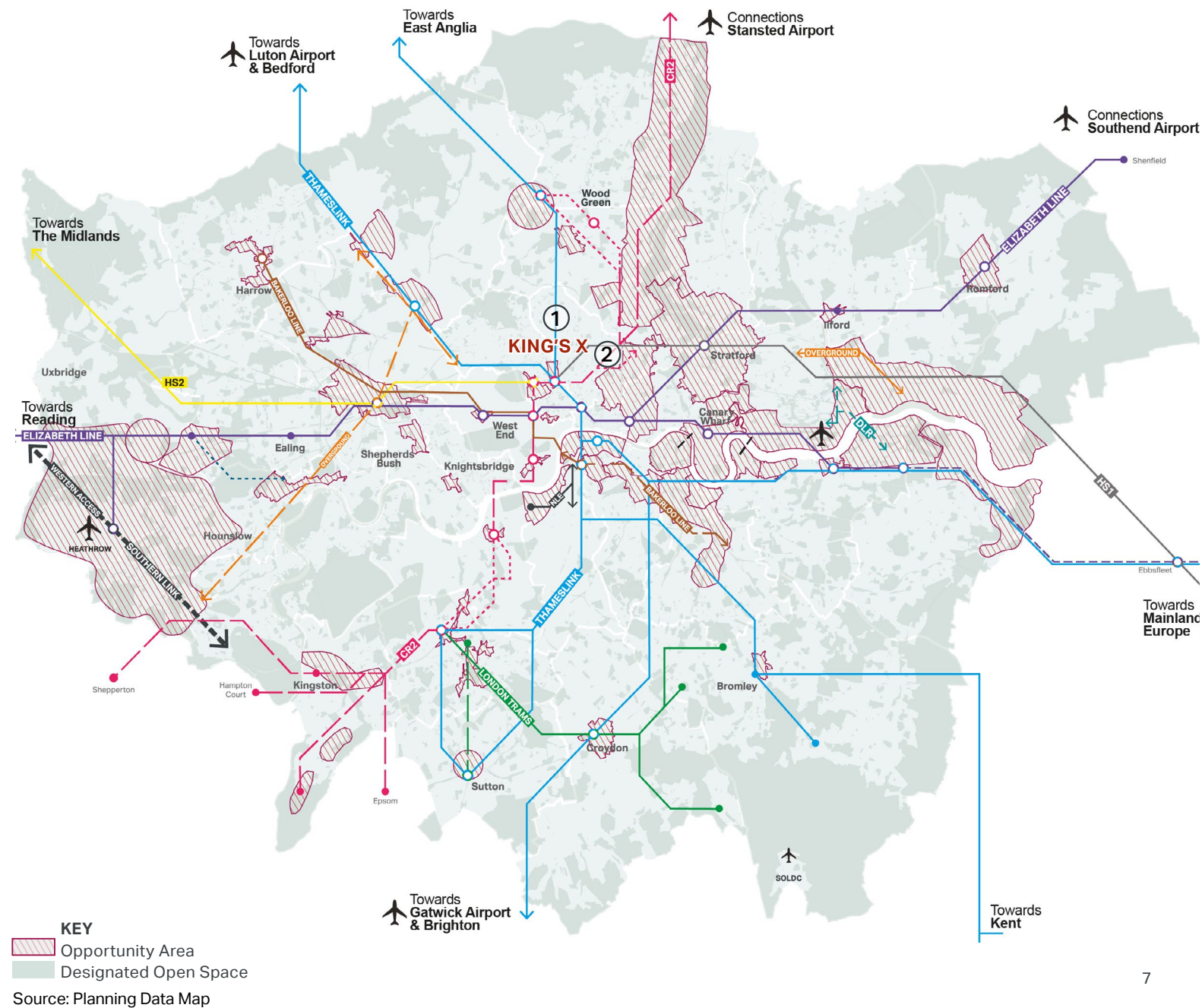


Source: Areas of Regeneration as per London Plan 2021

# King's Cross Context

## Transport and Growth Corridors

- ① A well-connected OA.
- ② Crossrail 2 paused.

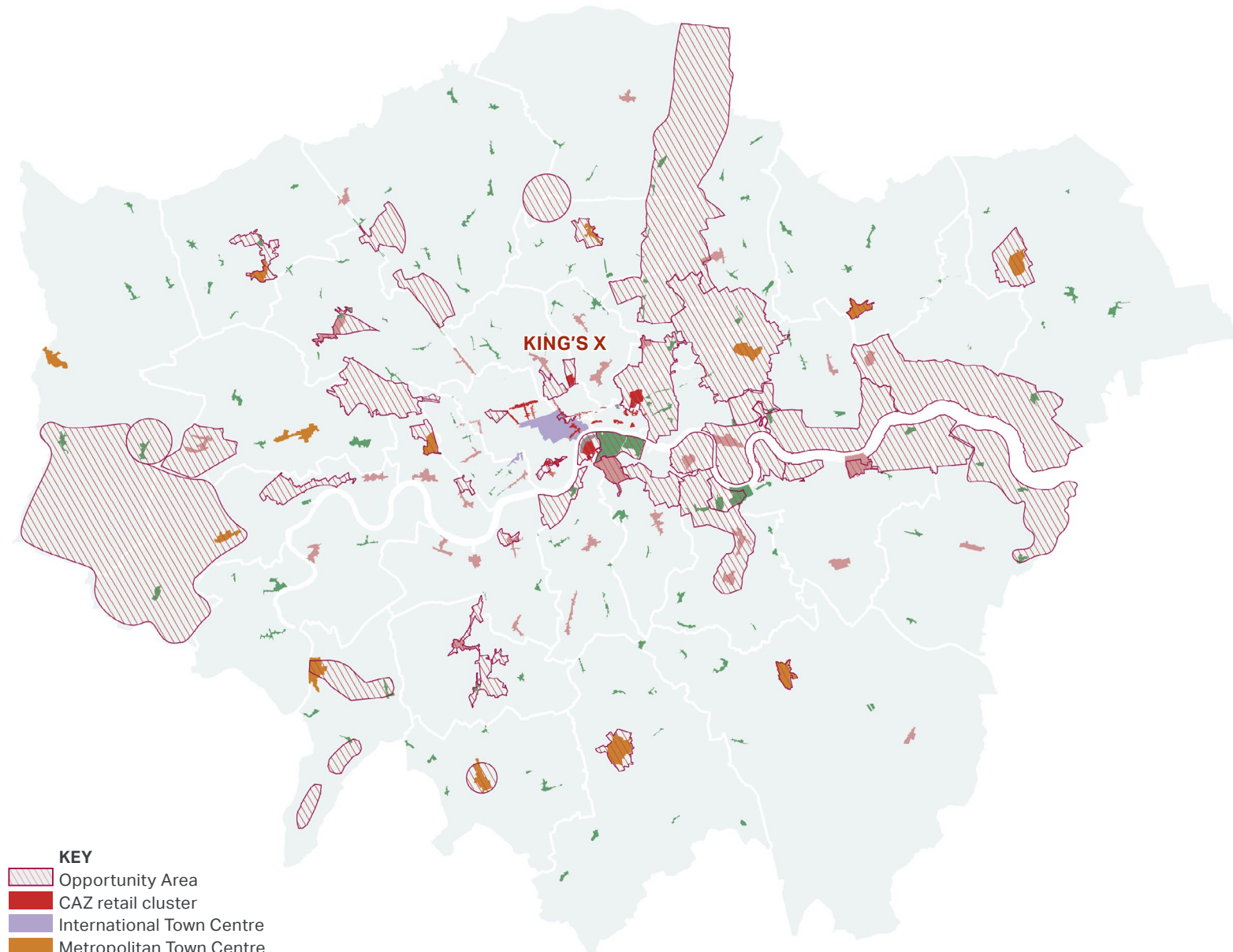


# King's Cross Context

## 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)

Note that whilst this is not relevant for King's Cross OA it sets the wider context across London, and helps identify OAs that contain/ overlap with town centres.



Source: Planning Data Map

# King's Cross

## Key info

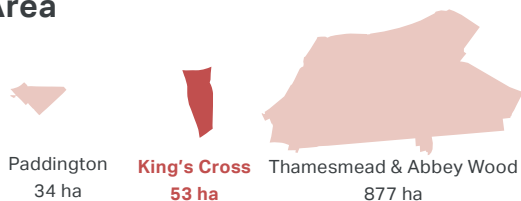
### London Plan Designation Year

2004 2008 2011 2016 2021

### Borough

London Borough Camden, Islington

### Area



### OA specific plans

King's Cross Opportunity Area Planning and Development Brief (2004)

### Local Plan status

Camden (Regulation 18), Islington (Recently adopted)

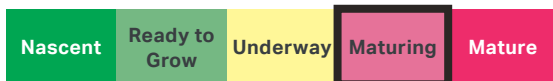
### Growth Corridor

Central London Growth Corridor

### Housing Delivery Test 2023

Camden (Presumption), Islington (Buffer)

### OA status (London Plan 2021)



London Plan 2021 capacities by 2041



Source: Google Earth

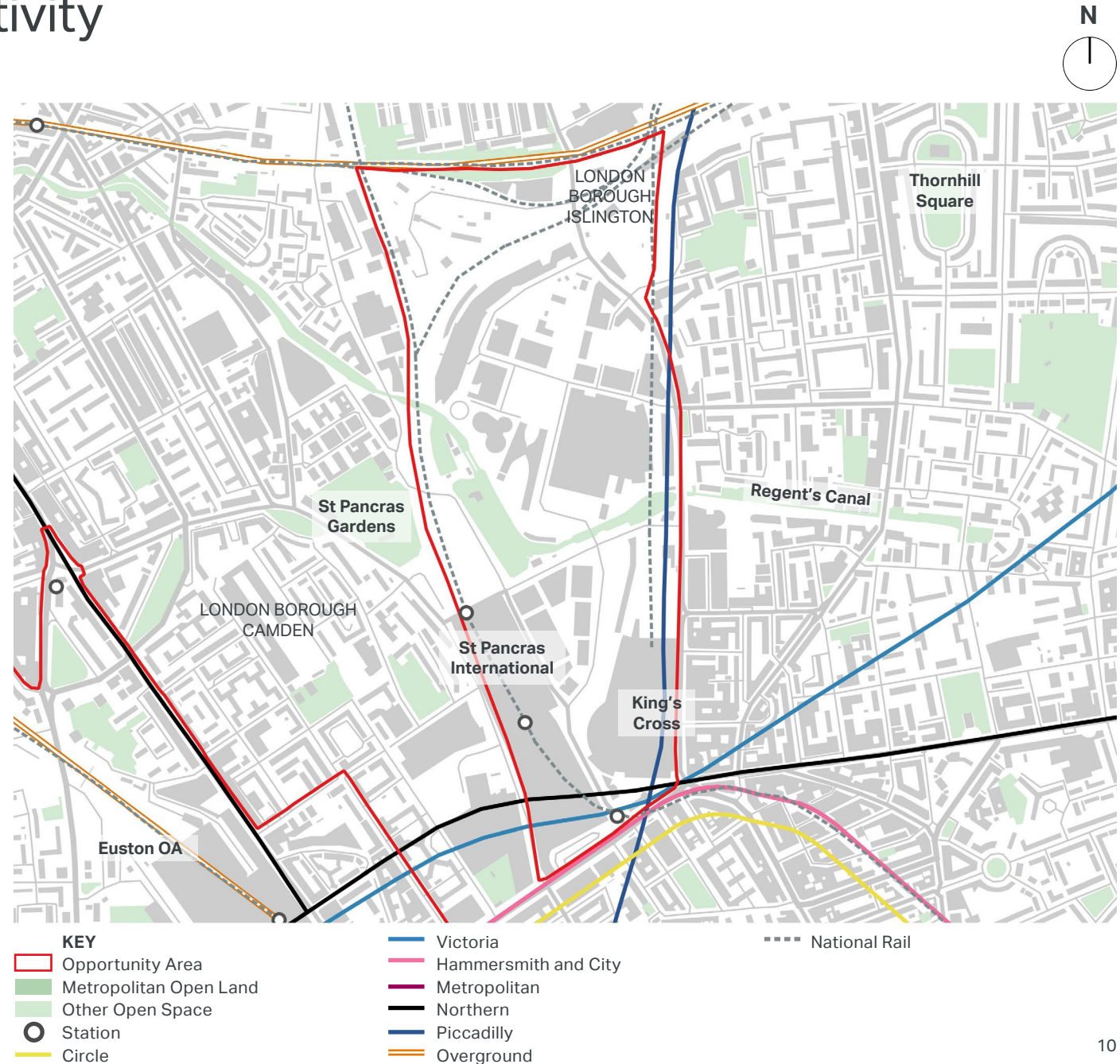
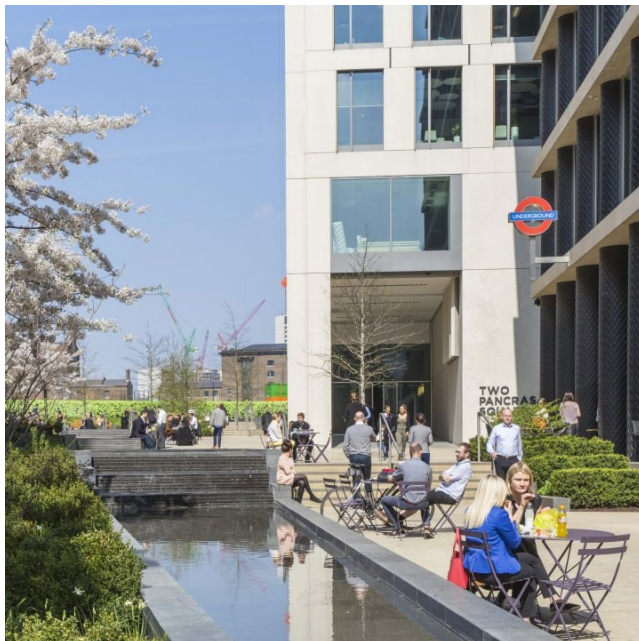
**KEY**  
 Opportunity Area

\*Note that the LESD (2021) increased the capacity to 32,800 new jobs

# King's Cross

## Transport and connectivity

- Part of the Central London Growth Corridor.
- Well-connected OA.

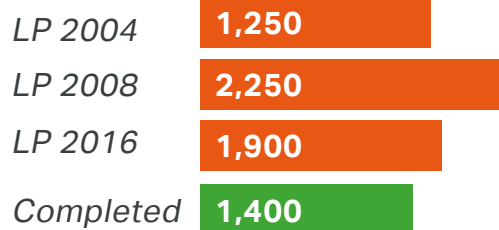


# King's Cross

## Delivery of homes

### Delivery pre-2019

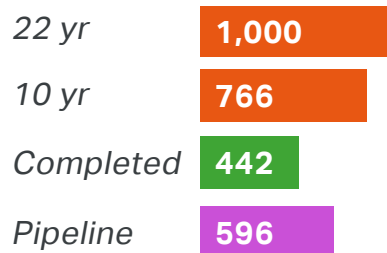
Completions against capacity



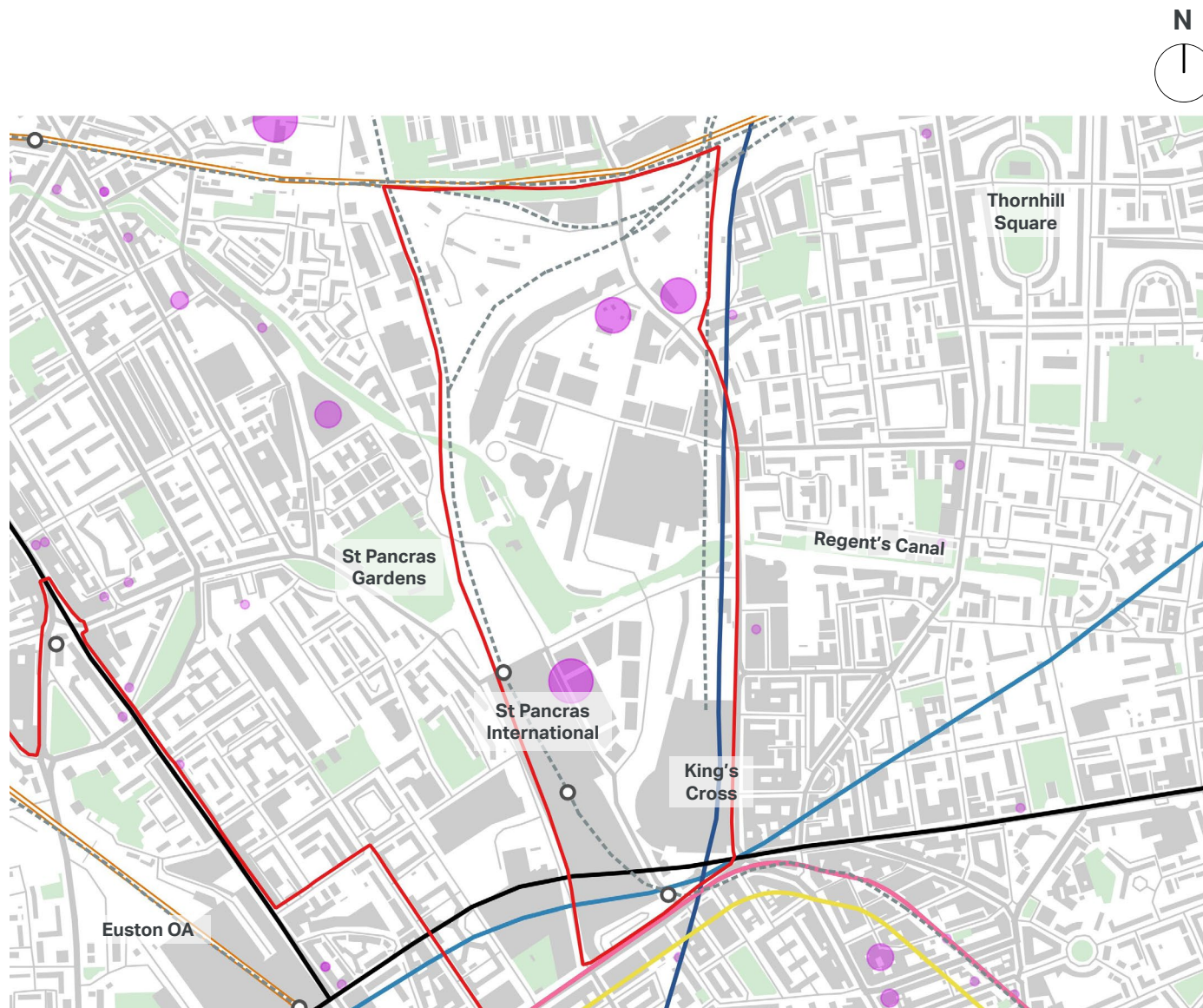
The OA exceeded its original capacity at designation.

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

Progress against 22yr, 10 yr capacity



The completions and pipeline in the OA exceed the indicative homes capacity that the London Plan set for 2041.



**KEY**

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

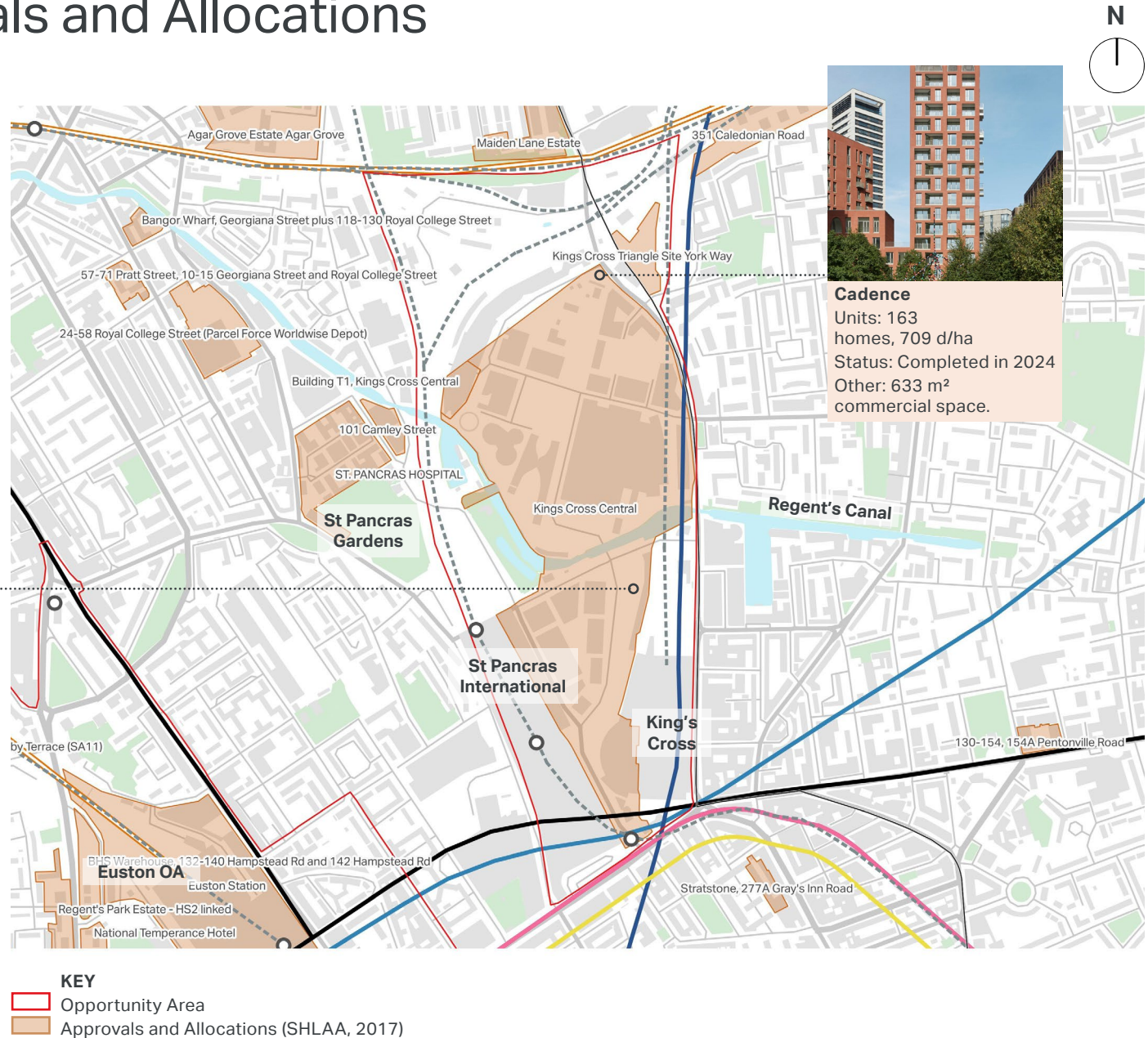
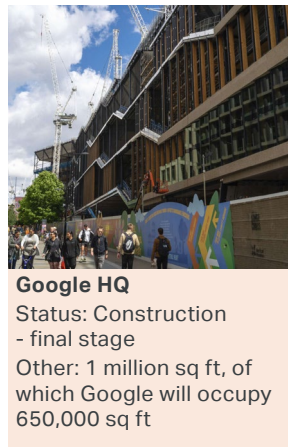
\*[Completions](#) account for all types of supply between 2019/2020 to 2023/2024.

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

# King's Cross

## SHLAA, 2017: Approvals and Allocations

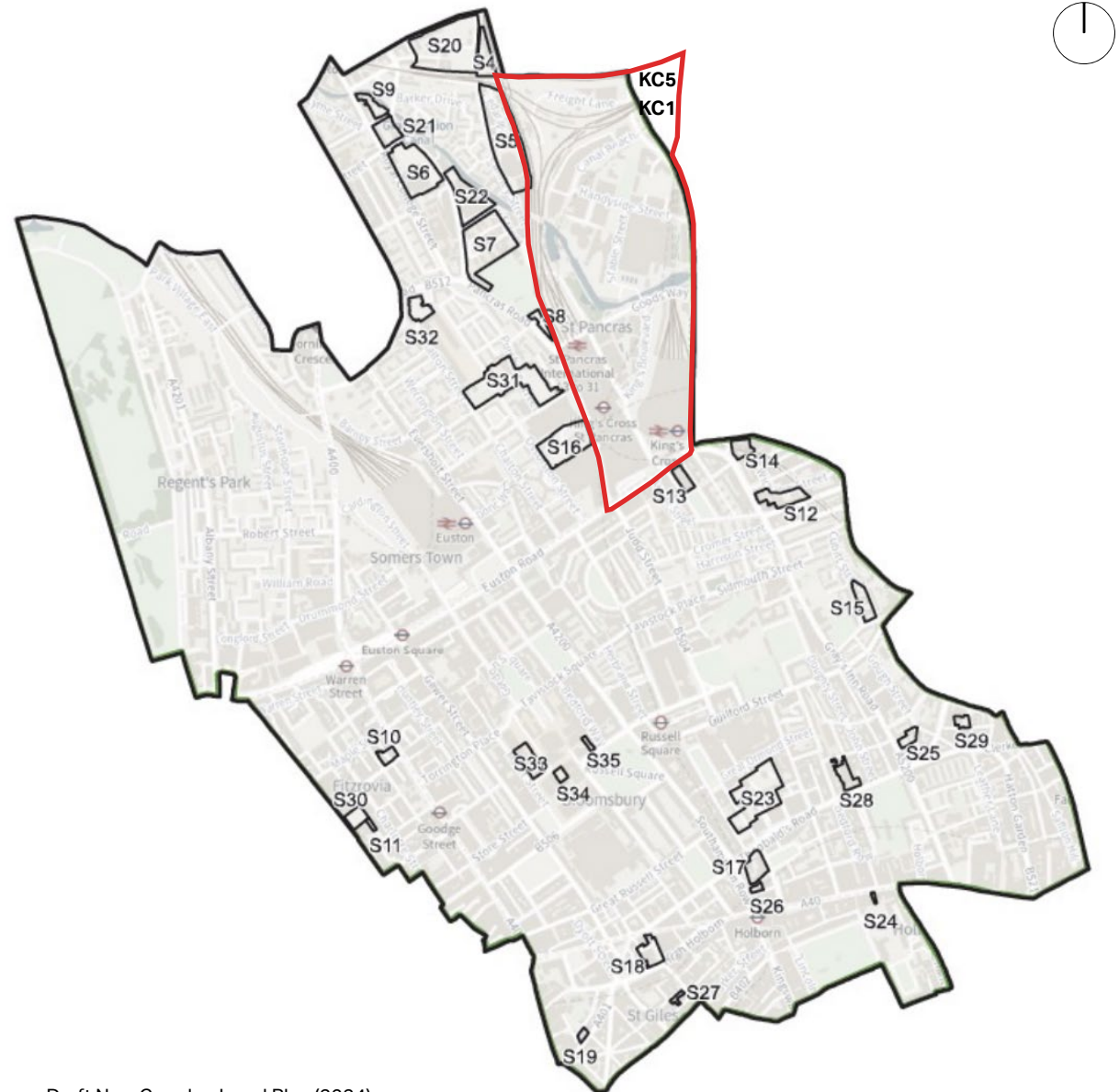
- Masterplan area allocated in the SHLAA 2017. Most of the allocation has been delivered or is in progress.



# King's Cross

## Site allocations: Local Plans

- Since SHLAA 2017, progress has been made in terms of plan making in the OA.
- No sites allocated for development in the LB Camden Regulation 18 (Jan 2024).
- Two allocations in the LB Islington Local Plan (adopted in 2023).
  - KC1: King's Cross Triangle (with planning permission for mixed -use, residential-led. Estimated completion 2025),
  - KC5: Belle Frontage. Potential for officer use to mark cluster. Estimated delivery 2026 to 2030.

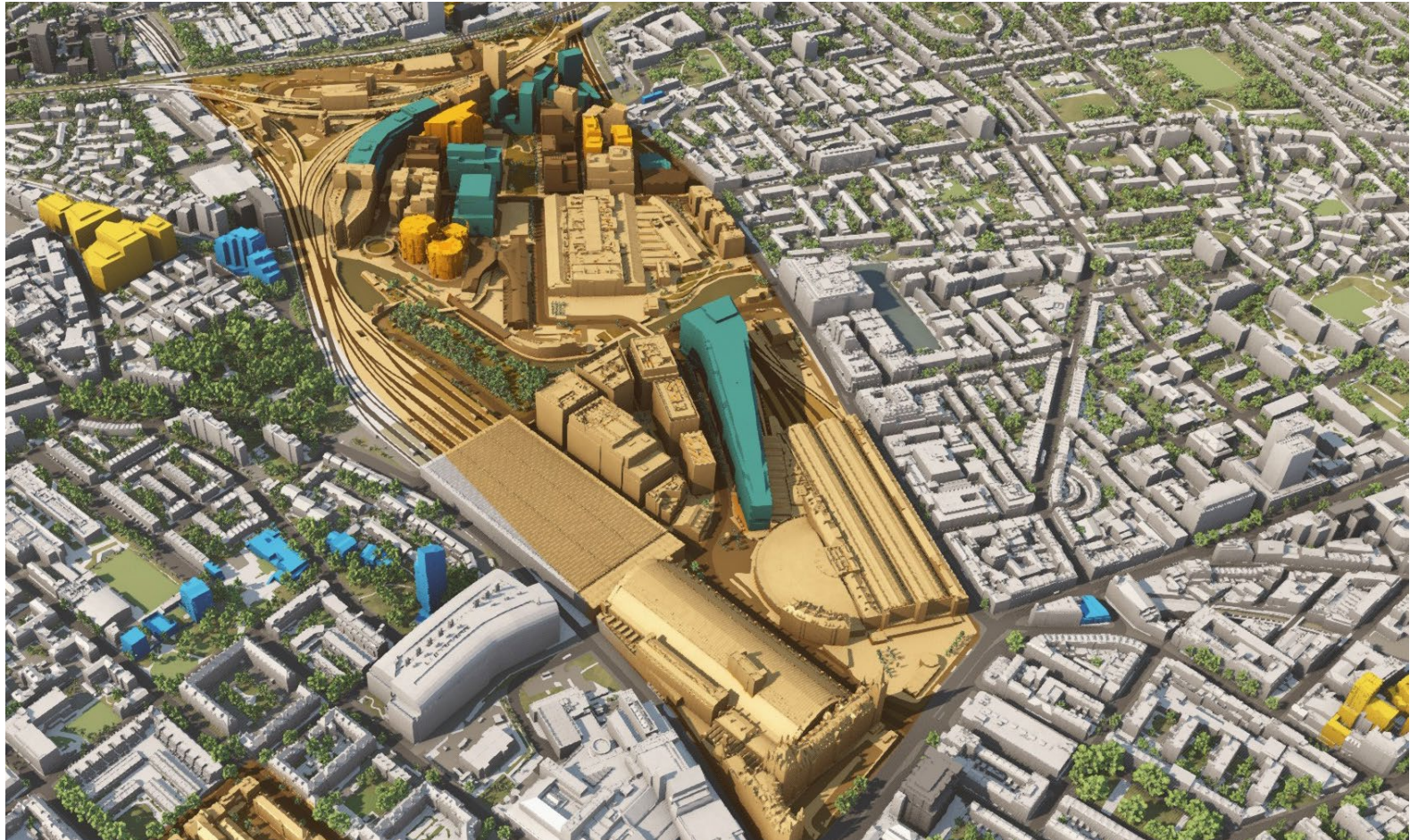


Source: Draft New Camden Local Plan (2024)

# King's Cross

## Development activity 2021

- Already majority of sites were under construction when the last London Plan was adopted in 2021.



Source: vu.city

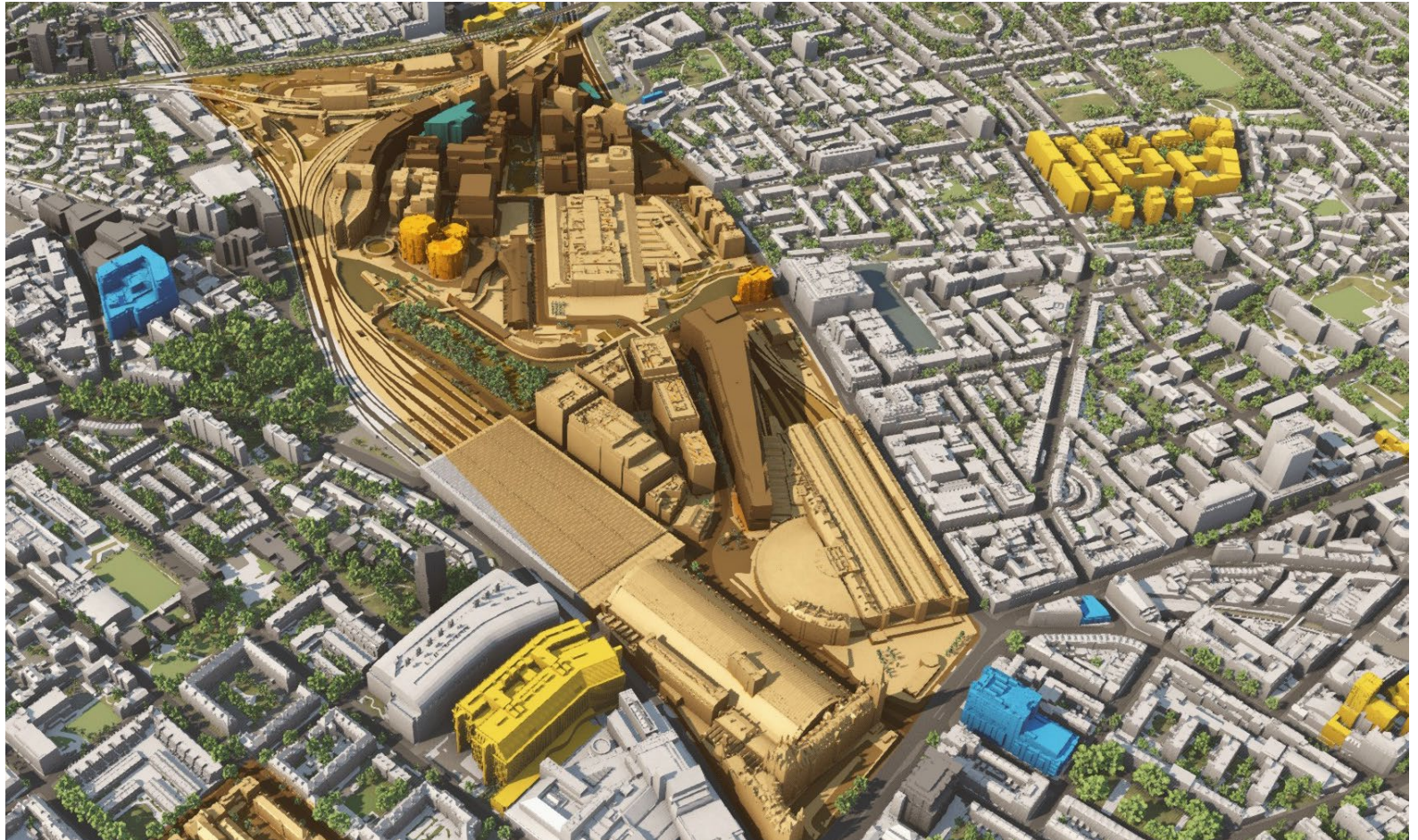
### KEY

- Consented
- Under construction
- Completed

# King's Cross

## Development activity 2024

- Today most of the sites within the OA are completed.
- Please note an issue with vu.city data. Gasholder site is completed.



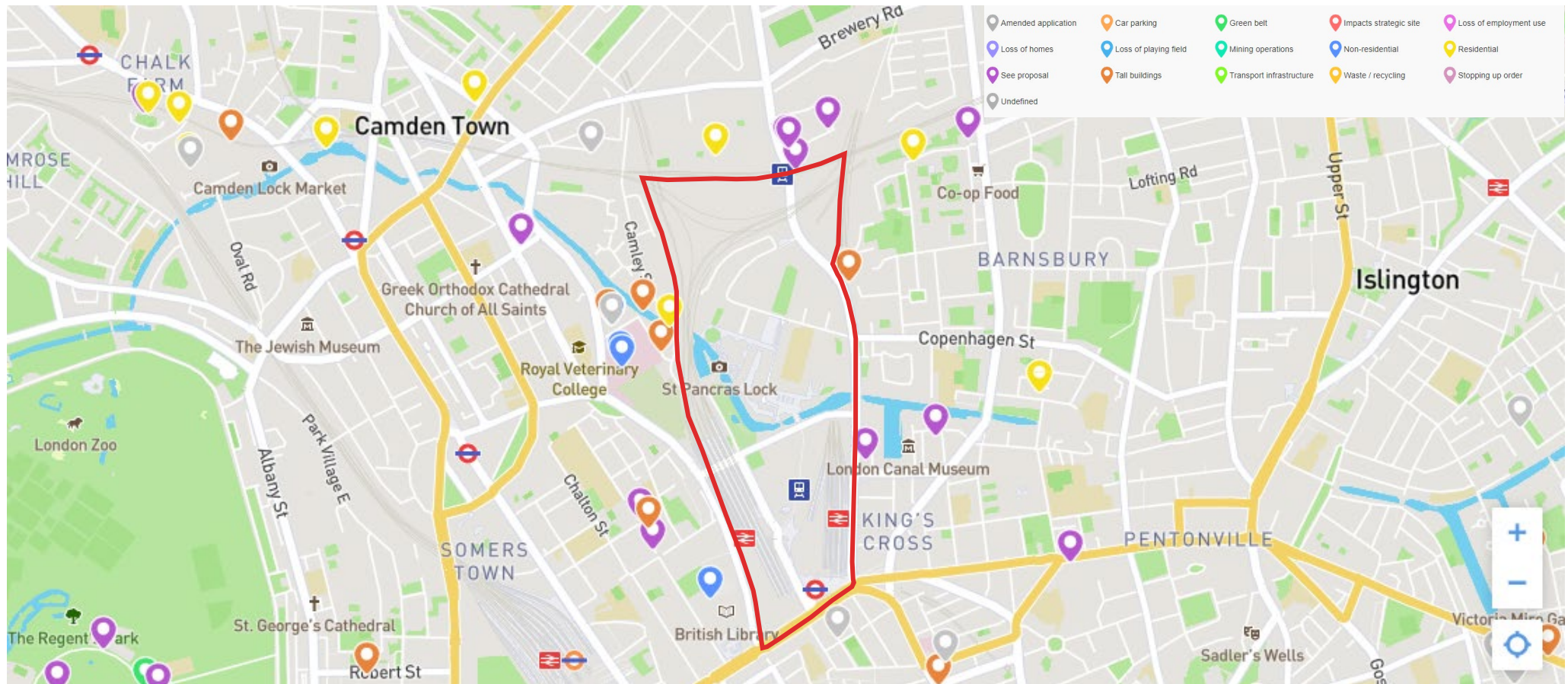
Source: vu.city

### KEY

- Consented
- Under construction
- Completed

# King's Cross

## Development activity: GLA referable schemes



- Majority of 'live' referable schemes fall outside the OA boundary, and to the north of St Pancras Gardens.
- This is an indicator of the 'mature' nature of the OA.

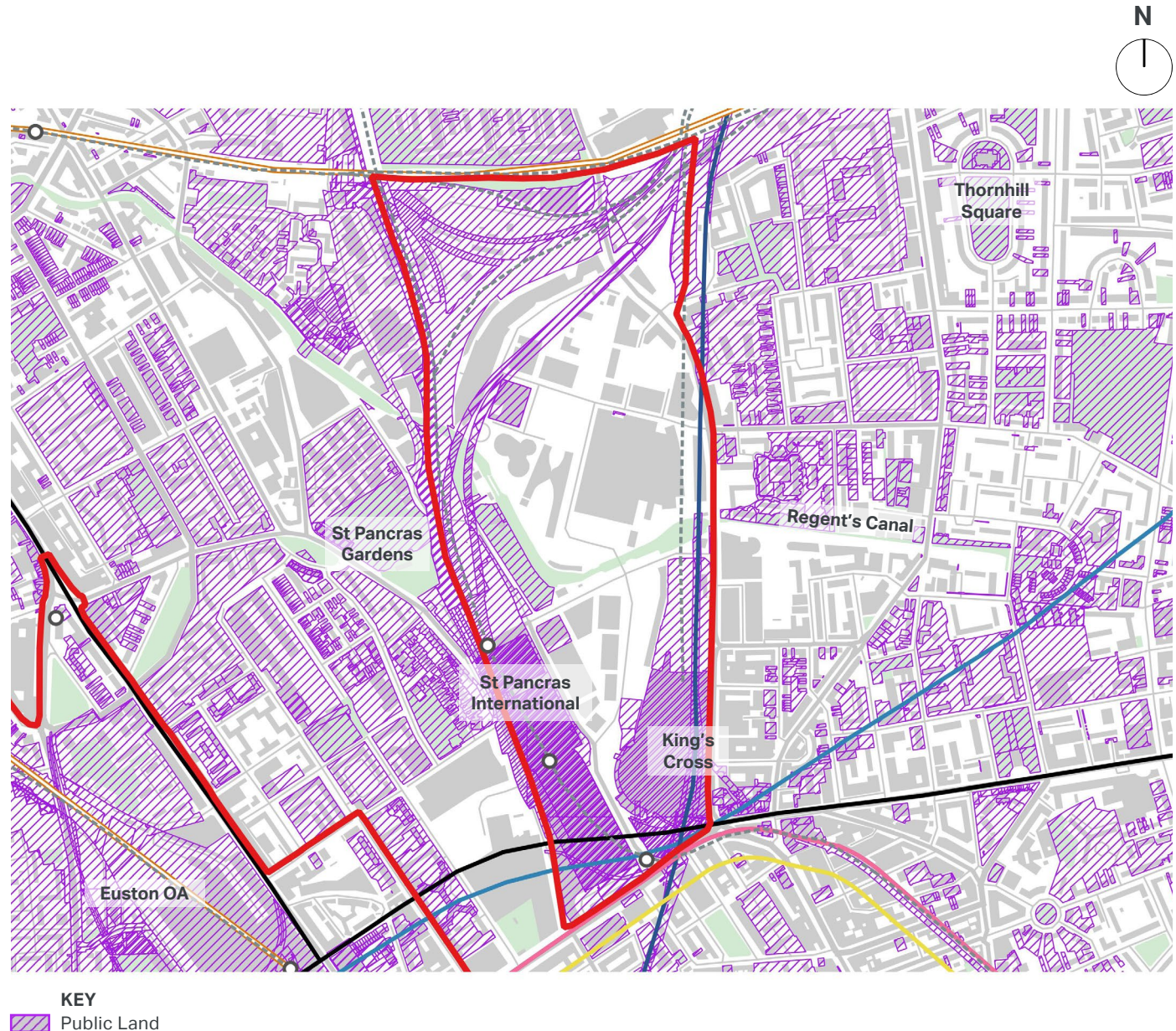
Source: <https://glaplanningapps.commonplace.is/>

# King's Cross Public Land

- 48 per cent of the OA area is public land. This includes mainly station land and concrete plant site to the north of the OA.

## Single ownership and delivery mechanisms

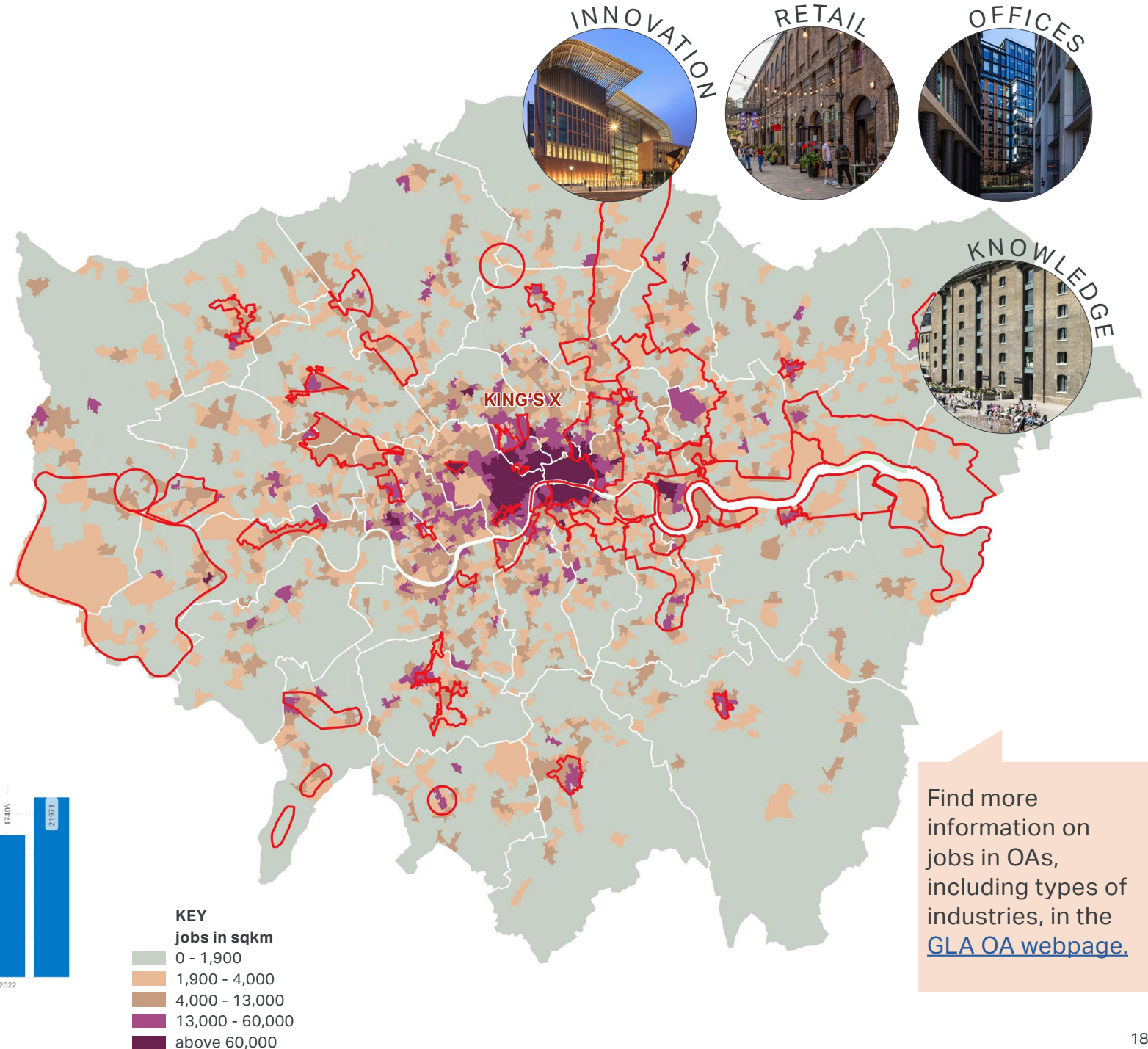
- In 2008, Argent, London & Continental Railways and DHL formed a joint partnership: Kings Cross Central Limited Partnership.
- The partnership was the single landowner at King's Cross.



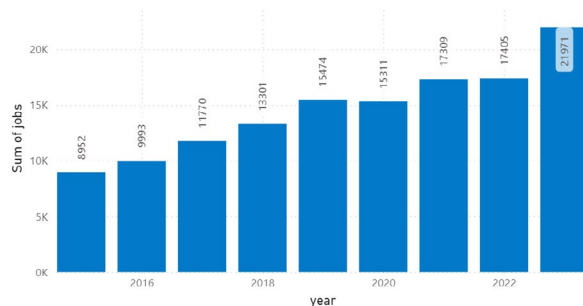
Source: Land Registry (2024).

# London Jobs

- King's Cross presents a high jobs density (proximity to CAZ, office cluster).
- In 2023 there were 22,000 jobs in the OA, which accounts for 6 per cent of the total jobs in Camden.



Jobs by year in the OA



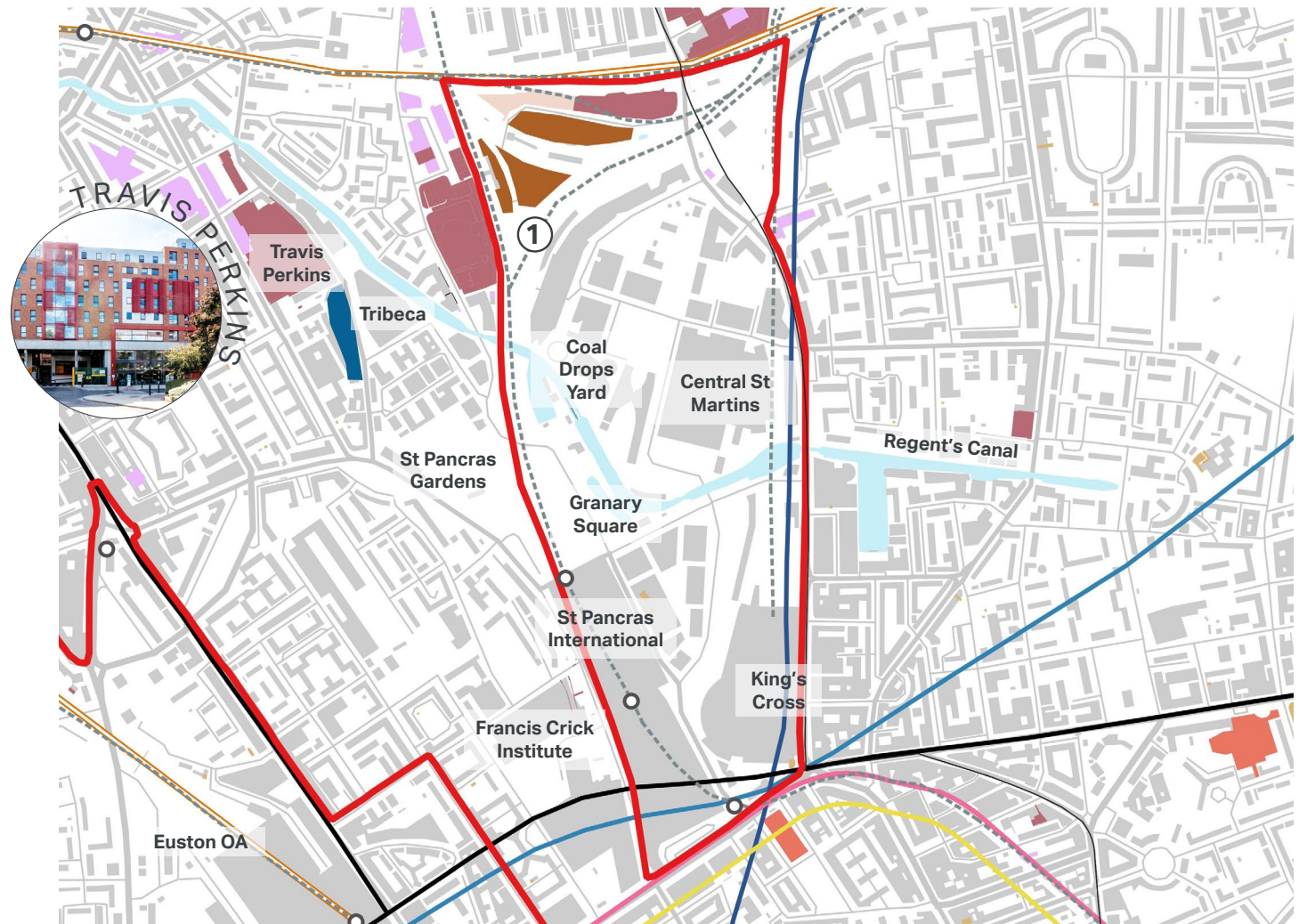
Source: Census, Business Register

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

# King's Cross

## Industrial land: Types of uses

- Non - designated industrial land to the north of the OA, bounded by railway lines.
- Typologies: Waste management and warehouse.
- Just outside of the OA, example of Travis Perkins co-location with student housing.



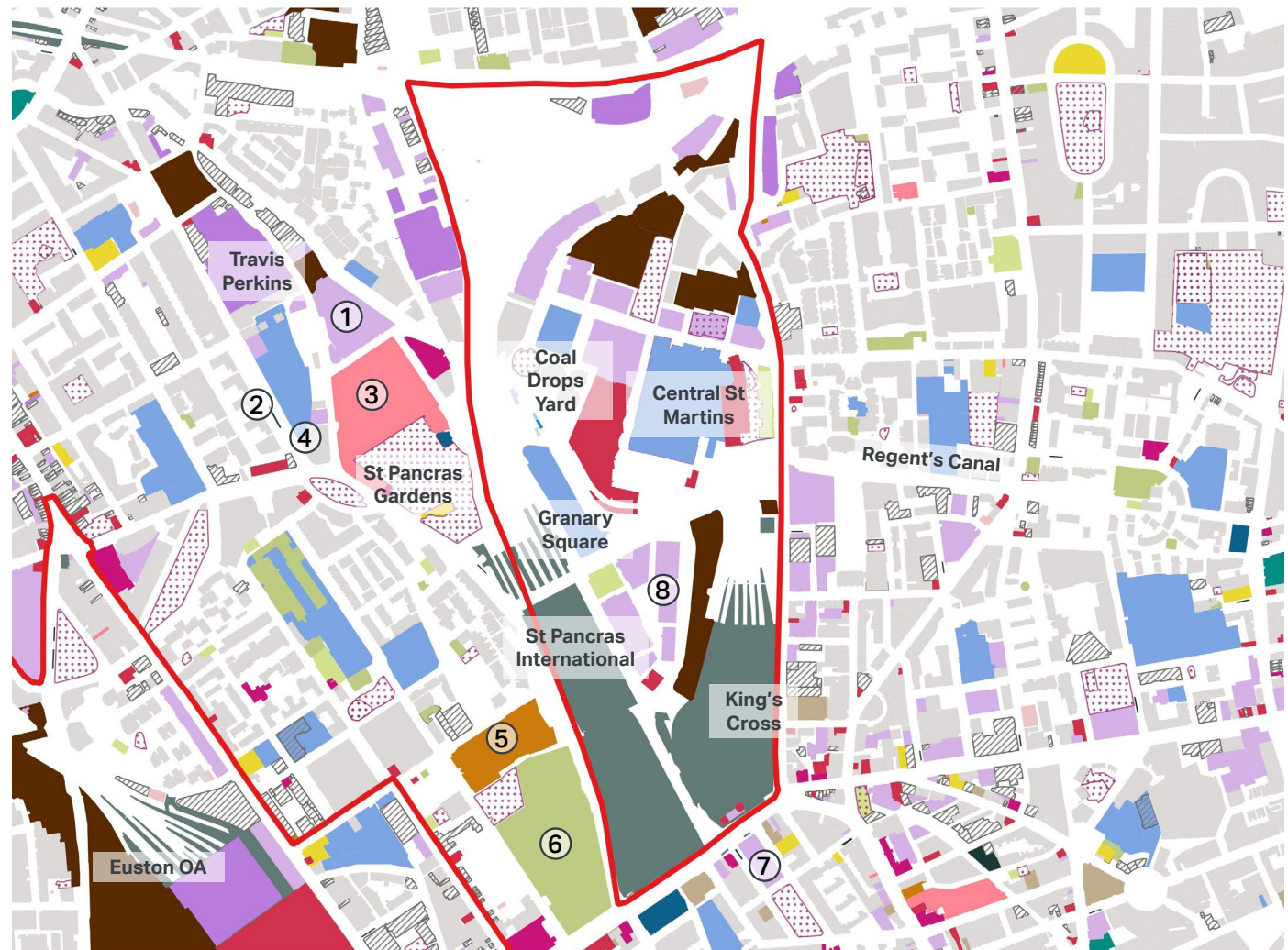
KEY	
<span style="color: blue;">■</span>	Docks
<span style="color: purple;">■</span>	General Industry
<span style="color: orange;">■</span>	Land for buses
<span style="color: darkblue;">■</span>	Mixed - use (industrial driven)
<span style="color: red;">■</span>	Self storage
<span style="color: yellow;">■</span>	Utilities
<span style="color: black;">■</span>	Vacant industrial land
<span style="color: brown;">■</span>	Warehouse
<span style="color: darkbrown;">■</span>	Waste management and recycling

# King's Cross

## Land uses

### Knowledge Quarter

- Strong education focus that acted as catalyst for placemaking, including Central St Martins.
- Life Sciences cluster just outside of the red line boundary (Crick Institute, emerging life sciences scheme in York Way and in Tribeca).
- Attraction and Activity (Granary Square, Gasholder Park, Pancras Square).



Source: OSNGB, City Intelligence Unit (GLA)

#### MedCity, Knowledge Quarter:

- |                            |   |                               |                        |
|----------------------------|---|-------------------------------|------------------------|
| ① Tribeca                  | ③ Camden and Islington NHS foundation trust | ⑤ The Francis Crick Institute | ⑦ MSD Discovery Centre |
| ② Royal Veterinary College | ④ London BioScience Innovation Centre       | ⑥ Alan Turing Institute       | ⑧ Astra Zeneca HQ      |

# King's Cross

## Meanwhile uses and early activation

- Early infrastructure works began in June 2007.
- Much of the early investment was focused in and around the Victorian buildings (Goods Yard).
- In 2011, University of the Arts London moved to the Granary Complex.
- Early delivery of open spaces and meanwhile uses were at the heart of the OA development.
- In 2015, King's Cross Pond Club occupied for a year a temporary site in the midst of the King's Cross construction site in London. It created a micro-ecological environment with a natural swimming pond at its centre.



Source: Ooze architects: [http://www.ooze.eu.com/en/urban\\_prototype/kings\\_cross\\_pond\\_club/](http://www.ooze.eu.com/en/urban_prototype/kings_cross_pond_club/)

# King's Cross

## Moving forward

- **King's Cross masterplan** is almost complete.
- **OA sits within the CAZ**, which is covered under London Plan SD4.
- There seem to be **no available land for significant growth**, as reflected in the emerging and adopted Local Plans of the boroughs.
- **Residential pipeline in the OA is relatively low** (around 2,085 homes still to be built, 28th out of the 47 OAs). For reference, the OA with the highest pipeline is Olympic Legacy (21,004 homes to be built). Source: Planning Data Hub.
- **Trends in non-residential floorspace suggest that the OA is 'on-track'** for delivering the employment space envisaged in the London Plan.
- **Future considerations: Relationship with emerging innovation/** life science developments to the west (Tribeca, Moorfields Eye Hospital) to ensure well-connected places.

### Proposition

- OA to be moved to 'mature' (de-designated) acknowledging the progress made to date in the OA.
- Best practice example in relation to delivery, public realm and density.



Workspace typologies. Source: 22 Handyside Street at London's King's Cross, Coffey Architects