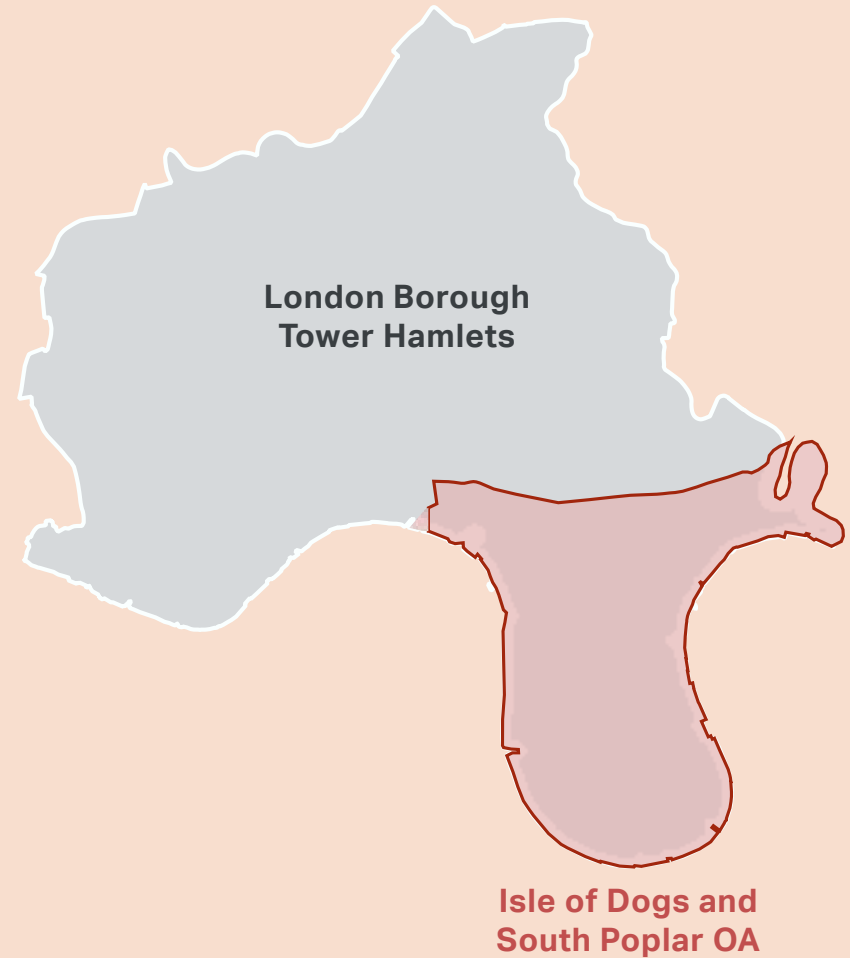


Opportunity Area Portrait

Isle of Dogs and South Poplar



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.

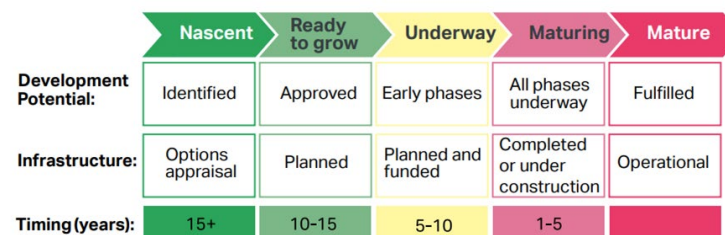
OA boundaries

- 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

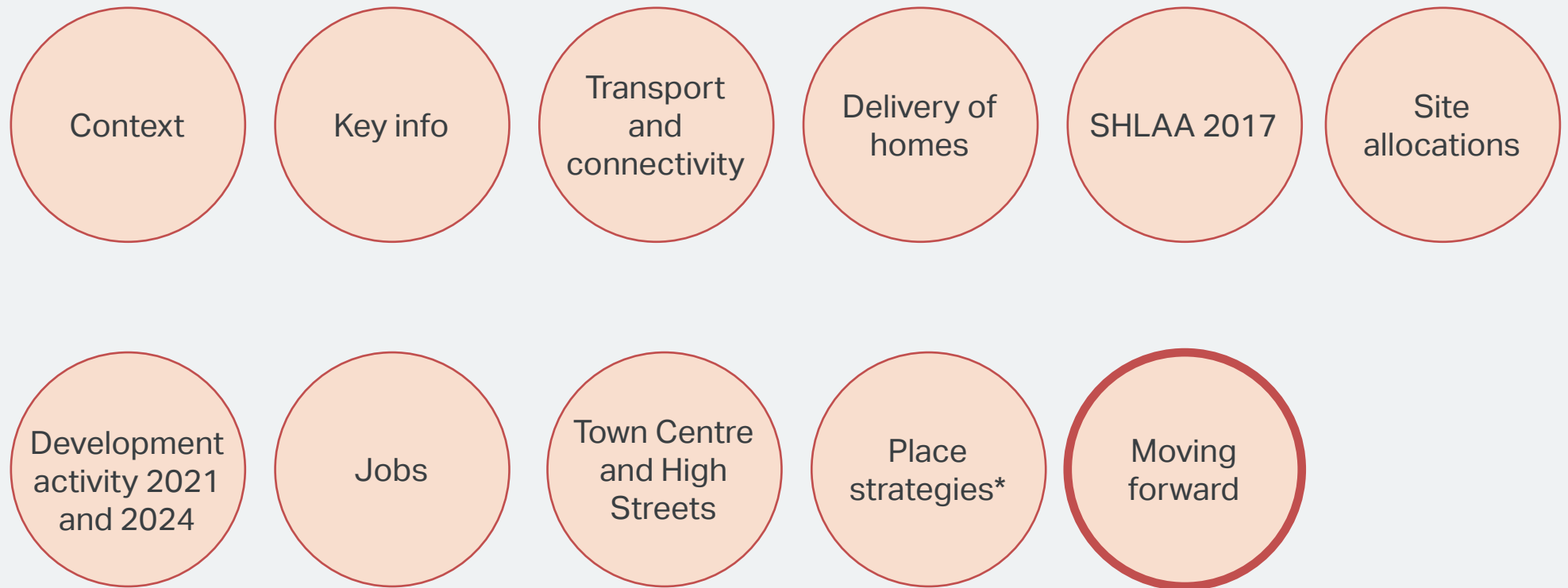


Additional resources

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

Introduction

Contents



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

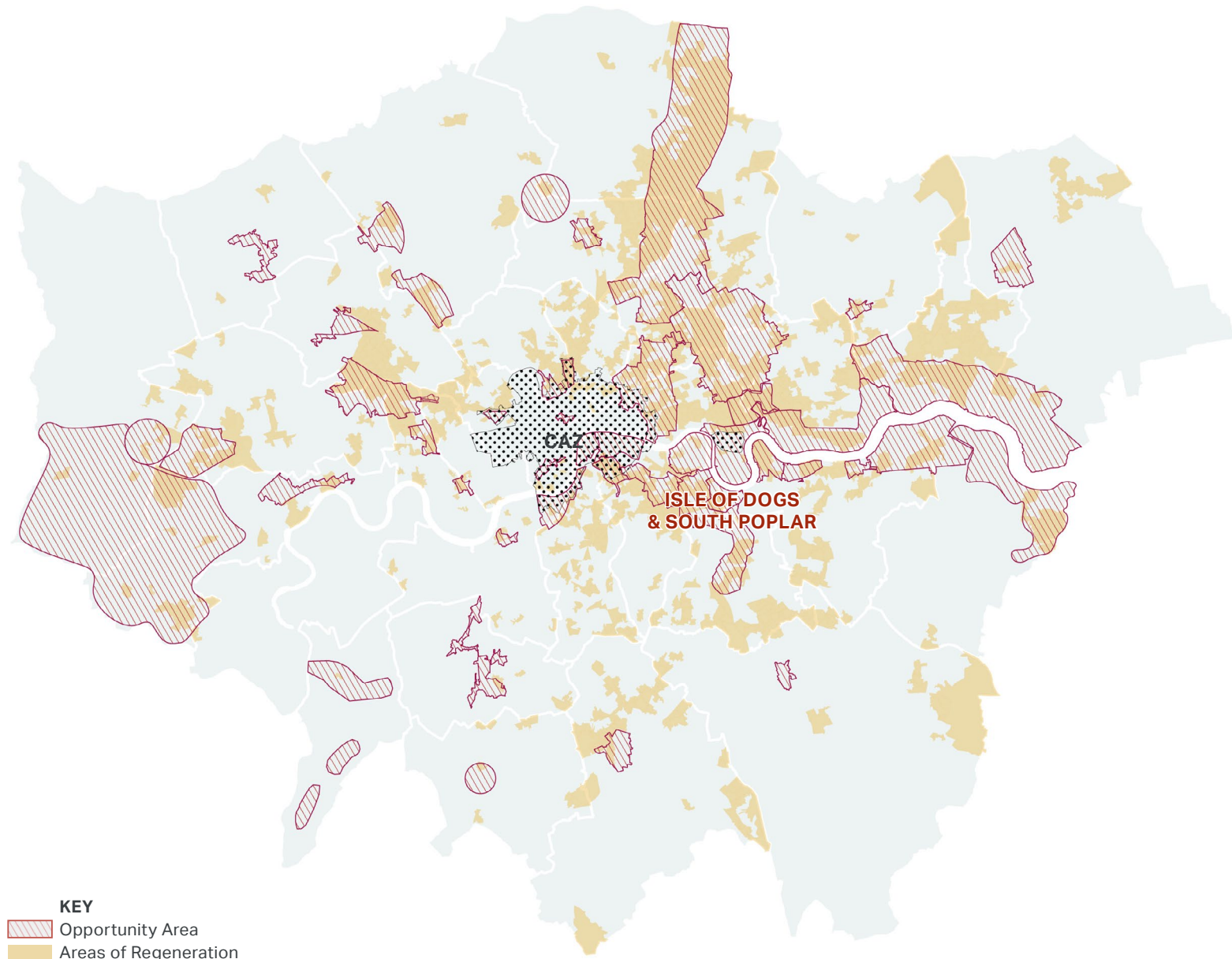
Isle of Dogs and South Poplar Context

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)
- The Northern Isle of Dogs (NloD), including Canary Wharf, is in the OA. This area is considered a satellite of the Central Activities Zone (CAZ) in London.

Areas of Regeneration

Areas of regeneration are located in the northern part of the OA closer to Poplar Riverside.

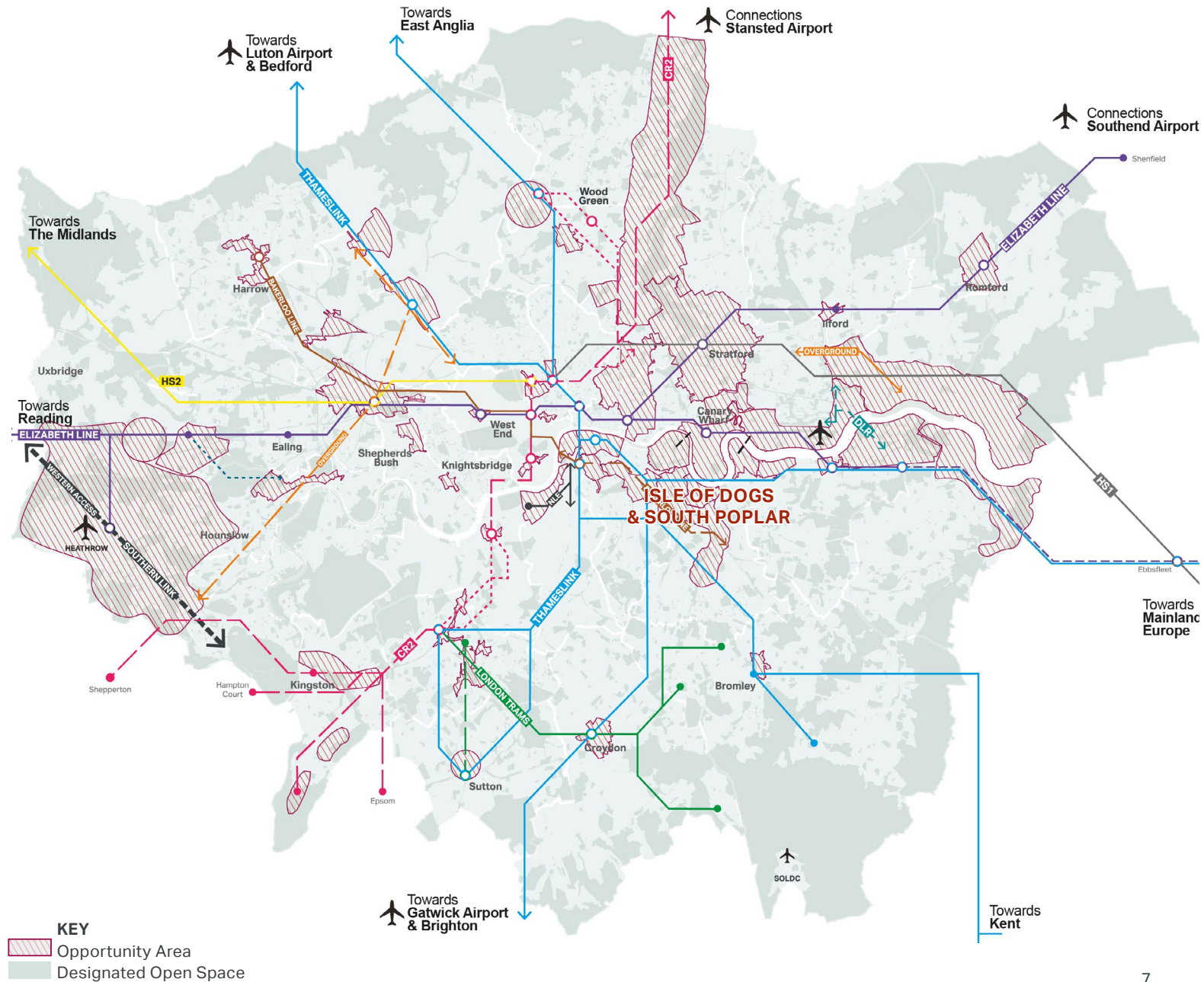
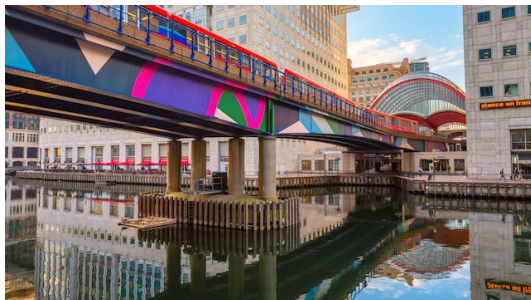


Source: Areas of Regeneration as per London Plan 2021

Isle of Dogs and South Poplar Context

Transport and Growth Corridors

- Very well connected OA, with the Elizabeth Line opening in Canary Wharf.
- Opportunities to improve local connectivity across the OA.

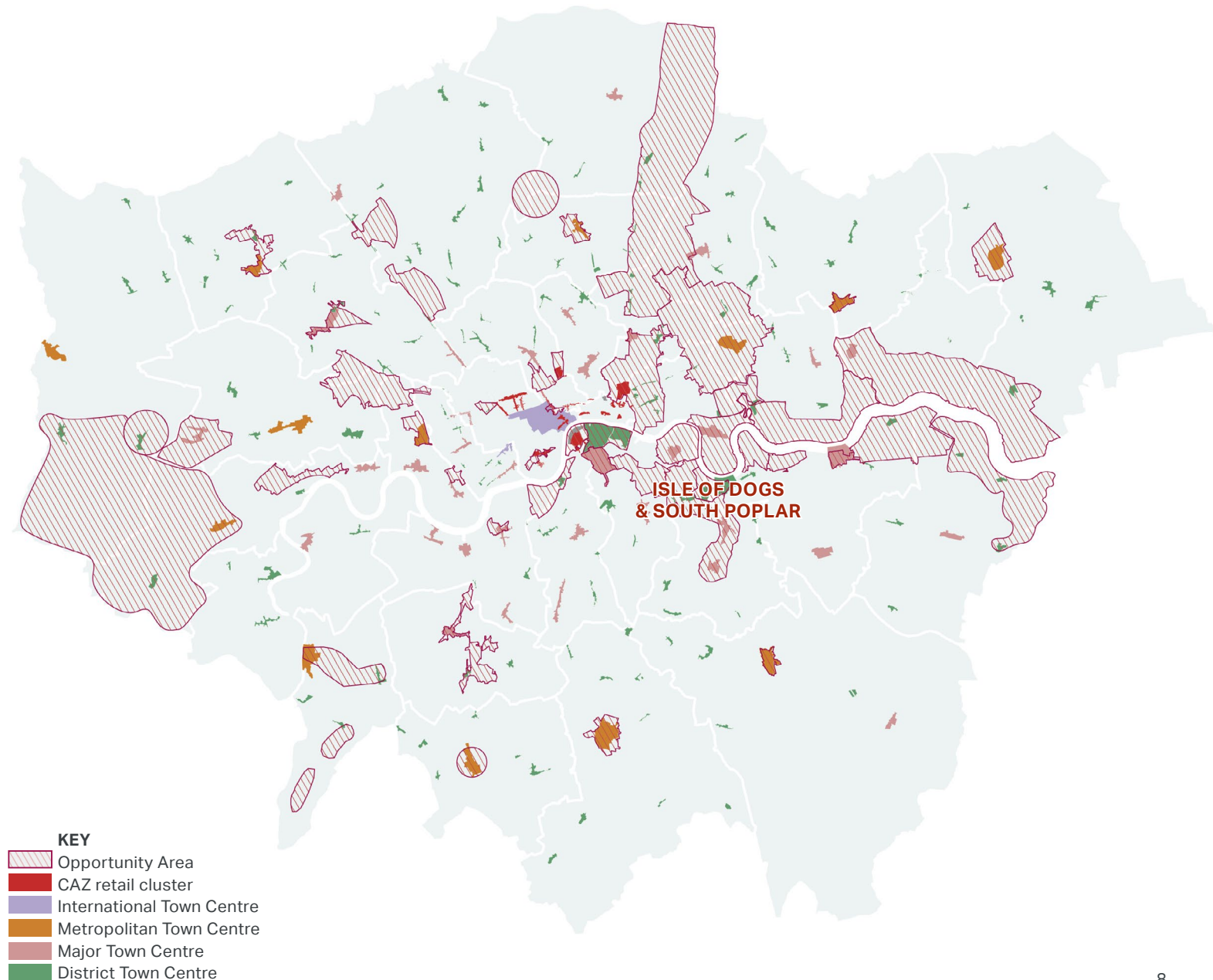


Isle of Dogs and South Poplar Context

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)

Major TC in the OA
(Canary Wharf).



Isle of Dogs and South Poplar

Key info

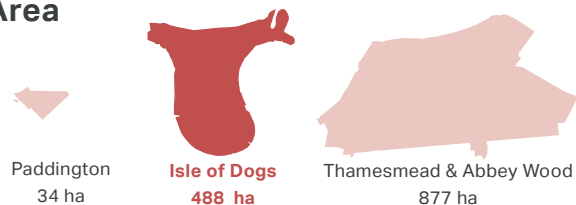
London Plan Designation Year

2004 2008 2011 2016 2021

Borough

LB Tower Hamlets

Area



OA specific plans

Isle of Dogs and South Poplar OAPF (2019), South Poplar Masterplan SPD (2021), Isle of Dogs Neighbourhood Plan 2019 – 2031 (2021)

Local Plan status

Regulation 19

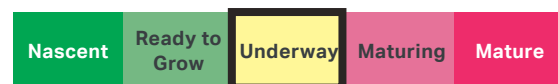
Growth Corridor

Central London Growth Corridor

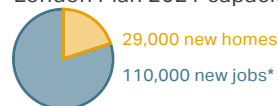
Housing Delivery Test 2023

Action Plan

OA status (London Plan 2021)



London Plan 2021 capacities by 2041



Source: Google Earth

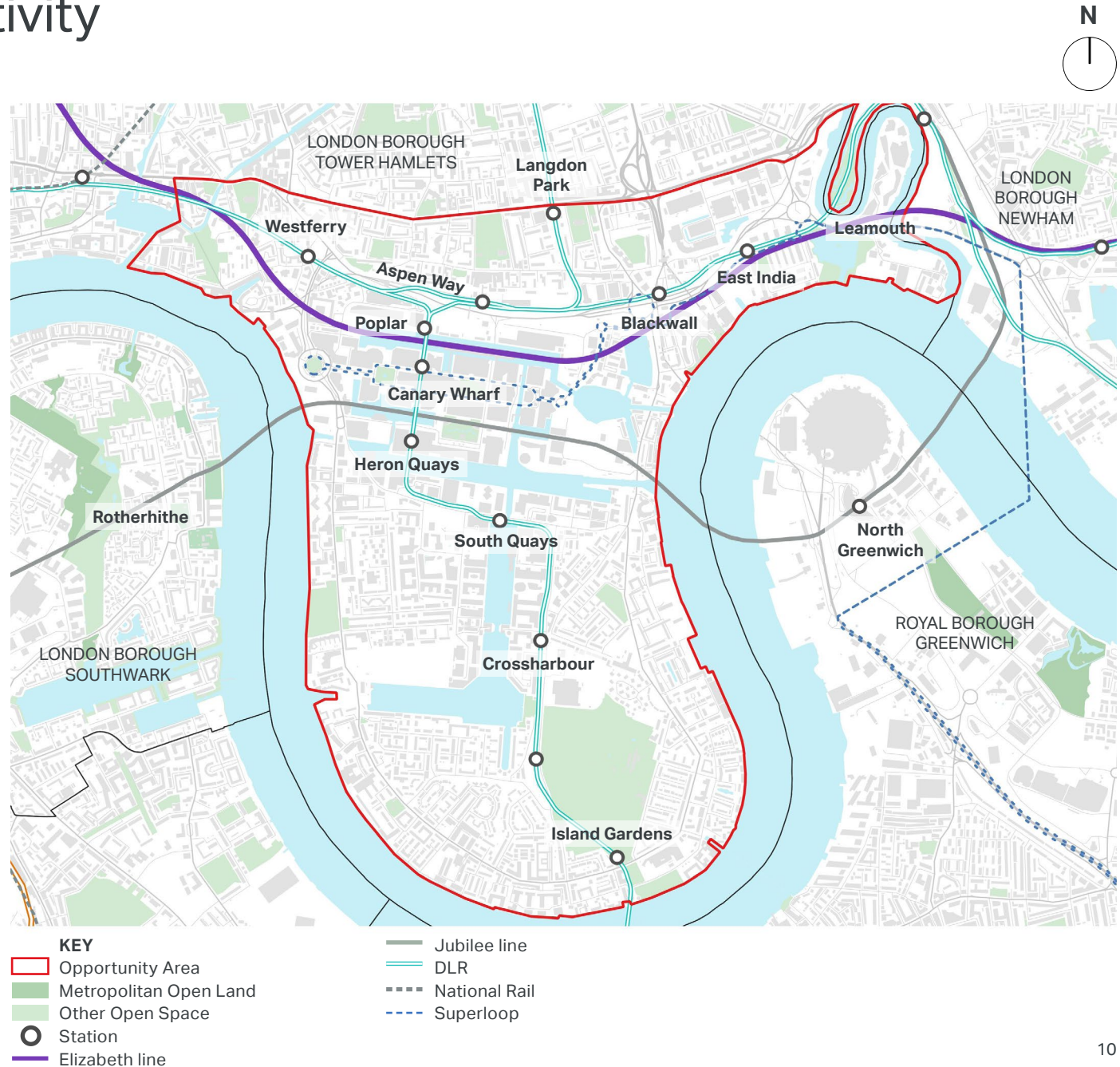
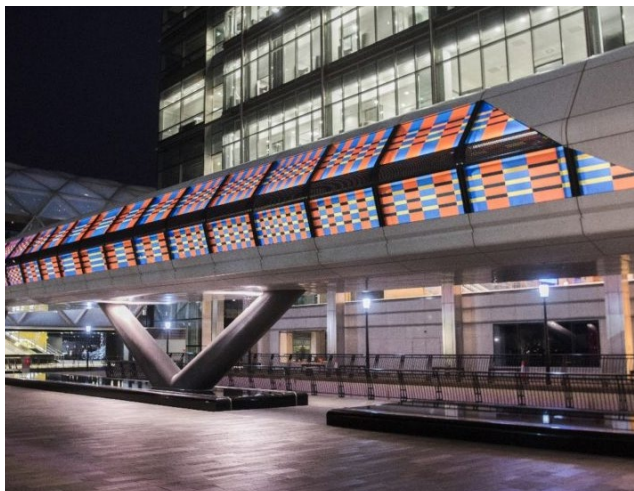
*Note that the LESD (2021) increased the capacity to 125,900 new jobs by 2041.

KEY
 Opportunity Area

Isle of Dogs and South Poplar

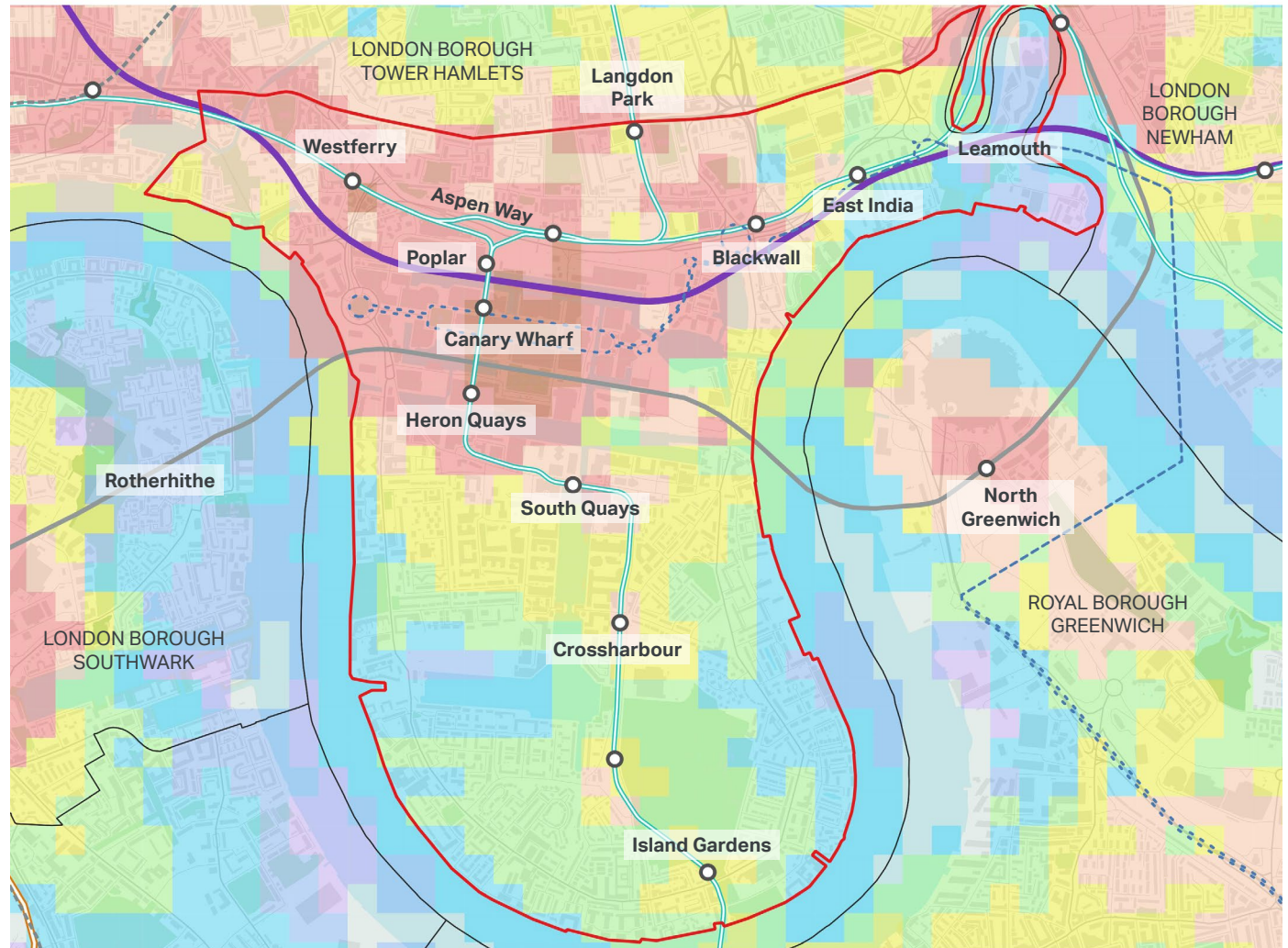
Transport and connectivity

- Part of the Central London Growth Corridor.
- Infrastructure improvements identified in the OAPF and emerging local plan would need to be delivered to support growth in the OA.
- These include improvements to local connections, green grid projects, community infrastructure, outdoor sports pitches, new parks and public open spaces and essential new and upgraded utilities and services infrastructure across the borough to ensure utilities networks and connections can serve new developments.



Isle of Dogs and South Poplar

Transport and connectivity: PTAL (2031)



Source: Transport For London

KEY
0 (worst)
1a
1b

2
3
4
5

6a
6b (best)

Isle of Dogs and South Poplar

Delivery of homes

Delivery pre-2019

Completions against capacity

LP 2004	3,500
LP 2008	10,000
LP 2016	10,000
Completed	11,160

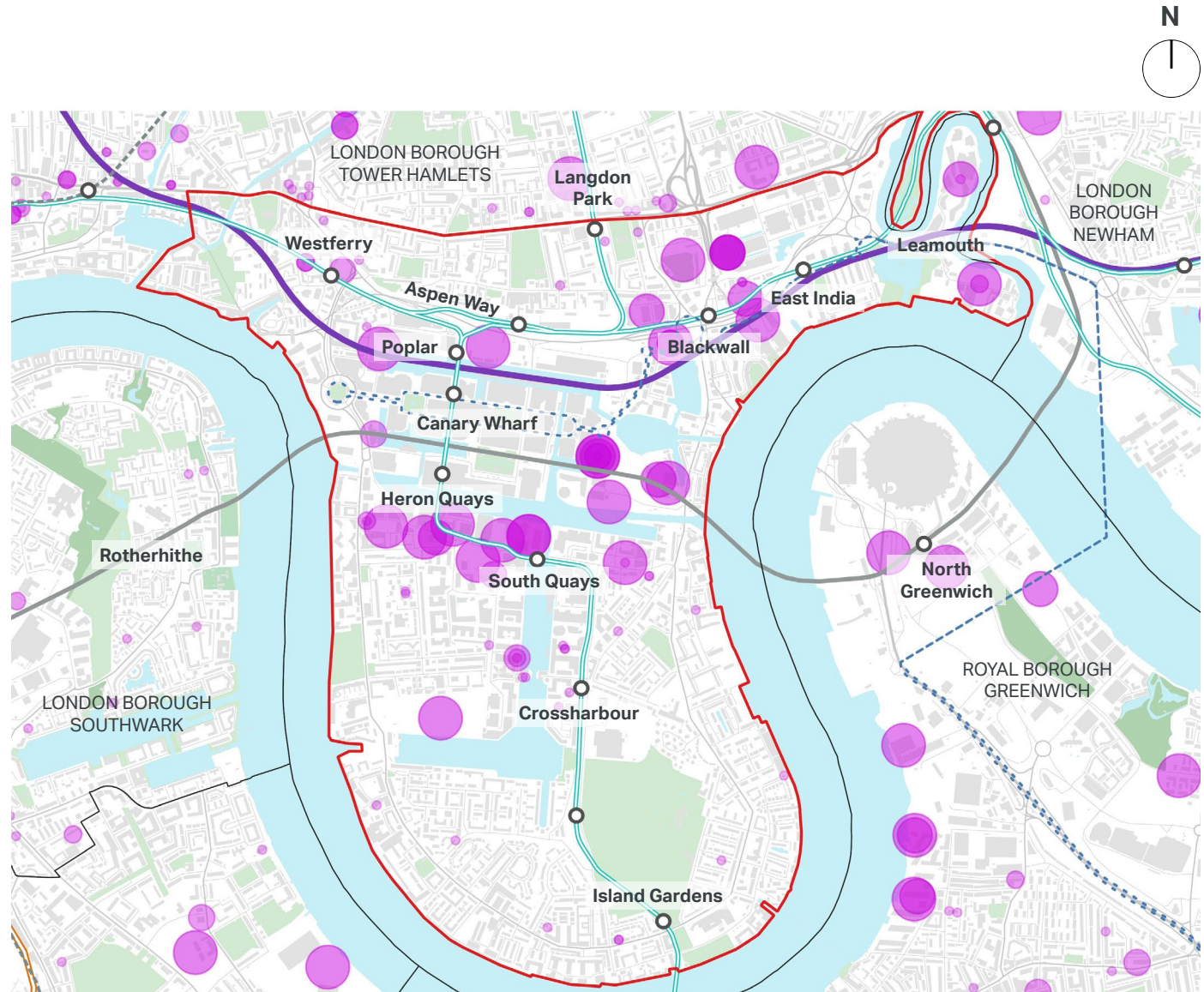
The OA exceeded its capacity at designation, delivering 11,160 between when it was first designated as an OA in 2004 and 2018/2019.

Delivery post - 2019 (London Plan 2021)

Progress against 22yr, 10 yr capacity

22 yr	29,000
10 yr	18,000
Completed	8,000
Pipeline	18,246

The OA is delivering 1,600 homes per year against an indicative rate of delivery of 1,400 homes per year. It has a high pipeline which if delivered by 2041 would mean that the OA can meet the 22 year indicative capacity.



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](#)

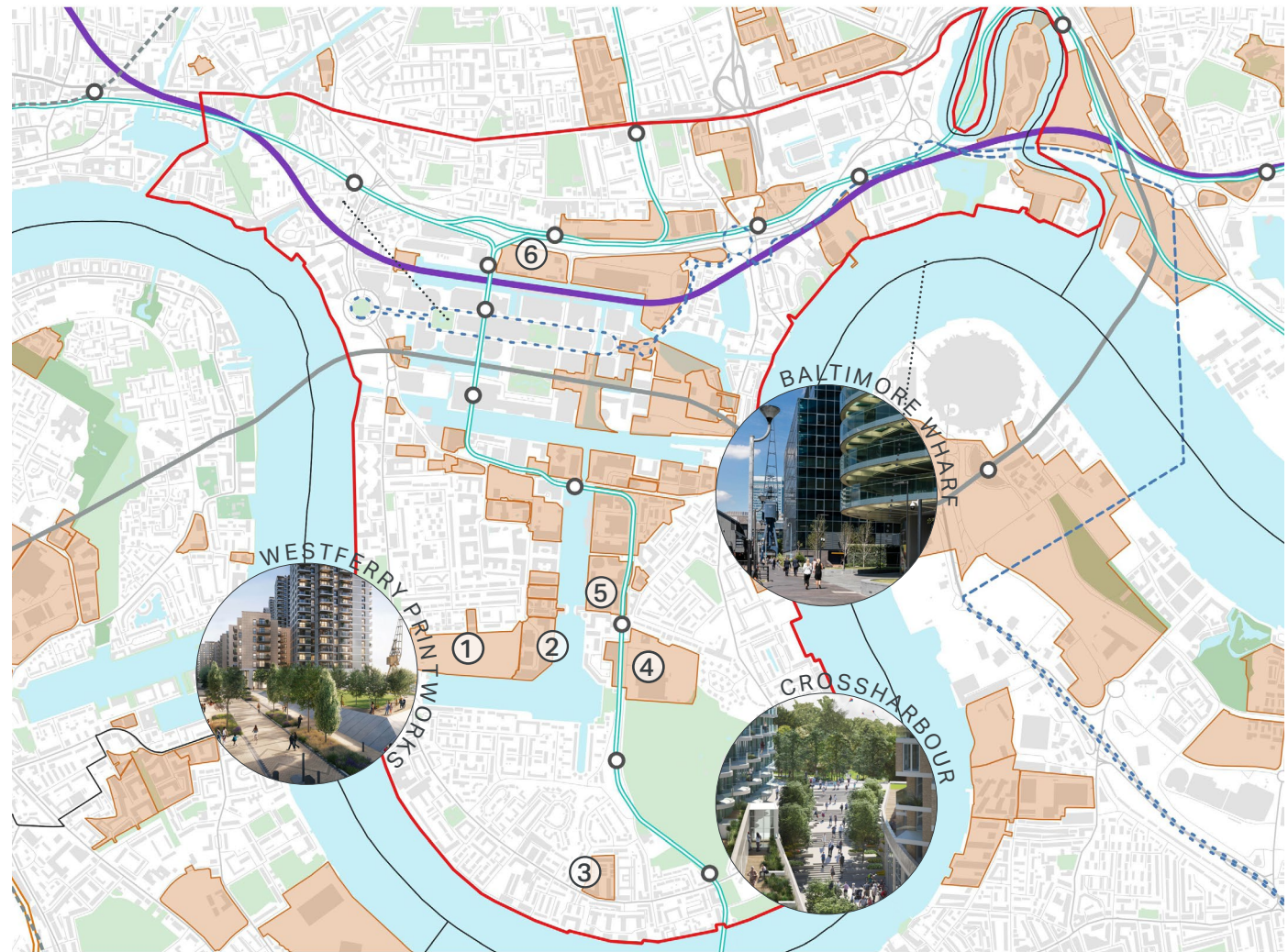
Notes: The 'pipeline' consists of any residential units that are live at the end of the financial year (2023/2024).

Isle of Dogs and South Poplar

SHLAA 2017: Approvals and Allocations



- ① **Westferry Printworks:** Application gained permission in February 2025; 1,358 residential units: 979 private, 379 affordable.
- ② **Echelon Data Centre**
- ③ **443-451 Westferry Road:** Completed in 2020. 173 affordable units.
- ④ **Crossharbour:** Application gained permission in 2024; up to 1,972 new homes (27% of which are affordable) and a new ASDA superstore will anchor the District Centre along with circa 7,200 sq.m of retail space including an arcade, with some 30% affordable dedicated to local businesses.
- ⑤ **Baltimore Wharf:** Completed in 2010; residential 1,111 units, 2,400 sq m retail, 143 rooms and 195 serviced apartment (hotel), 1,400 sq m leisure, 1,700 sq m community uses.
- ⑥ **Aspen Way:** under construction; the overall parent consent is largely commercial but includes 702 residential units - 70% private and 30% affordable

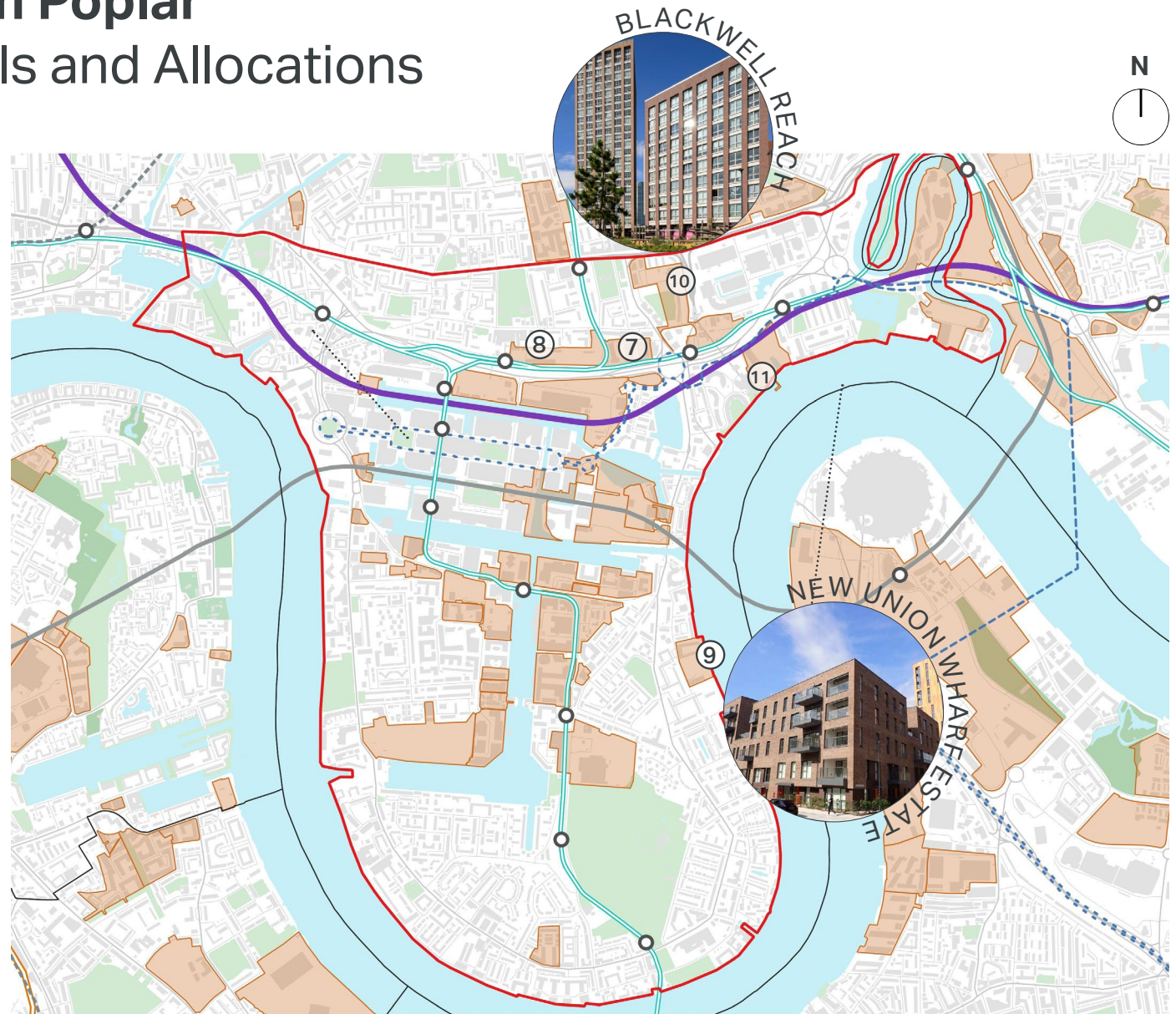


KEY
 Opportunity Area
 Approvals and Allocations (SHLAA, 2017)

Isle of Dogs and South Poplar

SHLAA 2017: Approvals and Allocations

- ⑦ **Poplar Business Park - Manhattan Plaza / Bloom Poplar:** Telford has delivered 120 of the 320 private units permitted on site.
- ⑧ **Castor Lane:** site in pre-planning.
- ⑨ **New Union Wharf Estate:** Complete in 2022; 399 residential units, community facility and landscape.
- ⑩ **Blackwall Reach - 2 - Parkside West:** Complete; 1,600 residential units.
- ⑪ **Reuters:** Application gained full permission in 2019; 898 residential units: 635 private, 263 affordable, primary school & nursery, commercial, business & service floorspace, communal floorspace, public house, realignment of & environmental improvements to Blackwall Way, associated car & cycle parking, landscaping & public realm works. In 2022, variation was submitted (including introduction of second staircase).



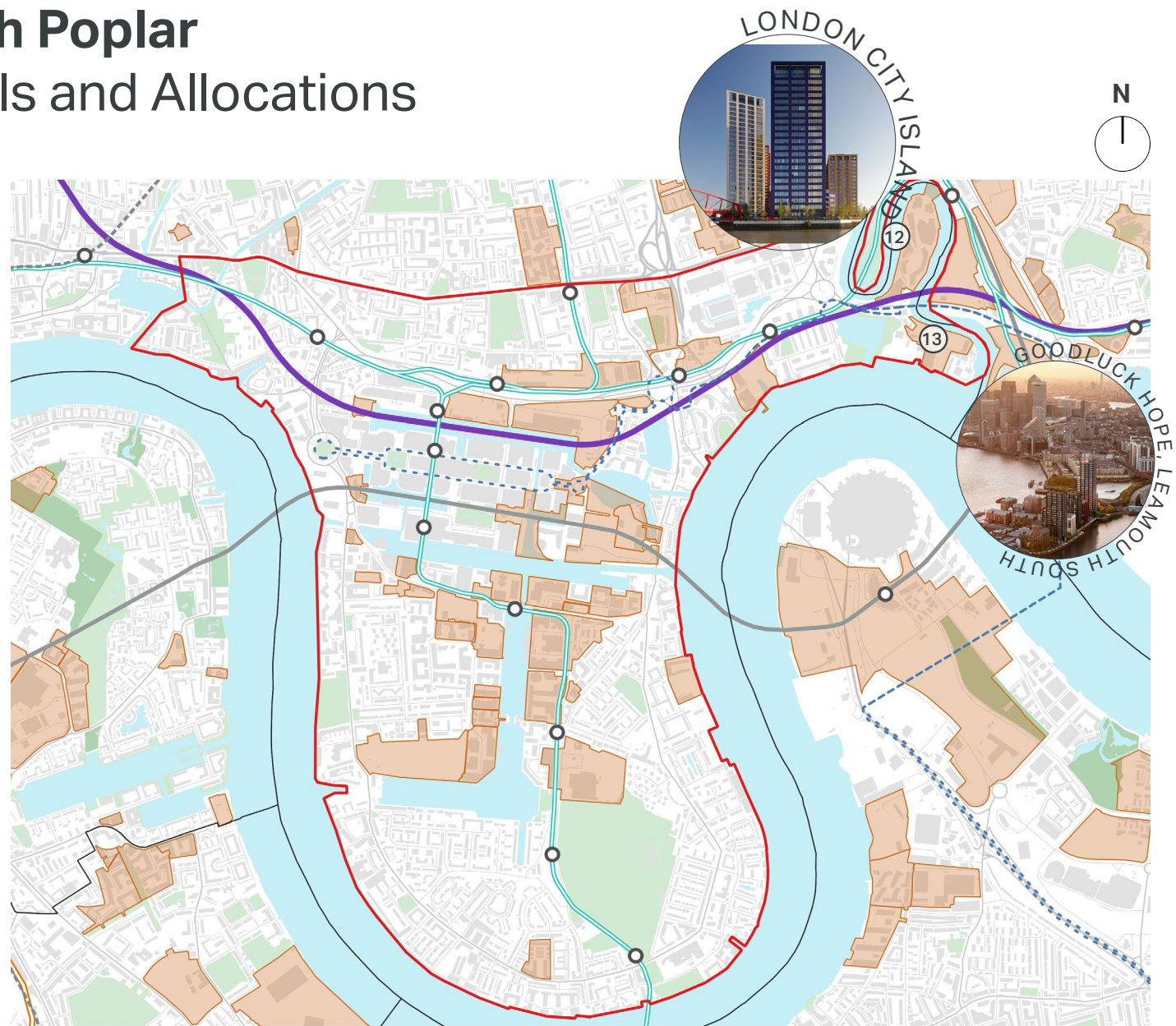
KEY

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

Isle of Dogs and South Poplar

SHLAA 2017: Approvals and Allocations

- ⑫ **London City Island (Leamouth Peninsula North):** Completed; 1,706 homes, including 11% affordable housing, stores, shops, restaurants, galleries and public spaces.
- ⑬ **Goodluck Hope, Leamouth Southern:** Completed; 841 new homes, a brewery, residents' club facilities, educational space, and over 23,000 sqm of retail, restaurants, and flexible workspace.



KEY

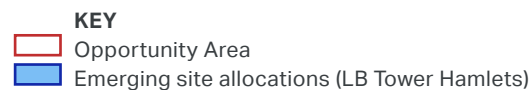
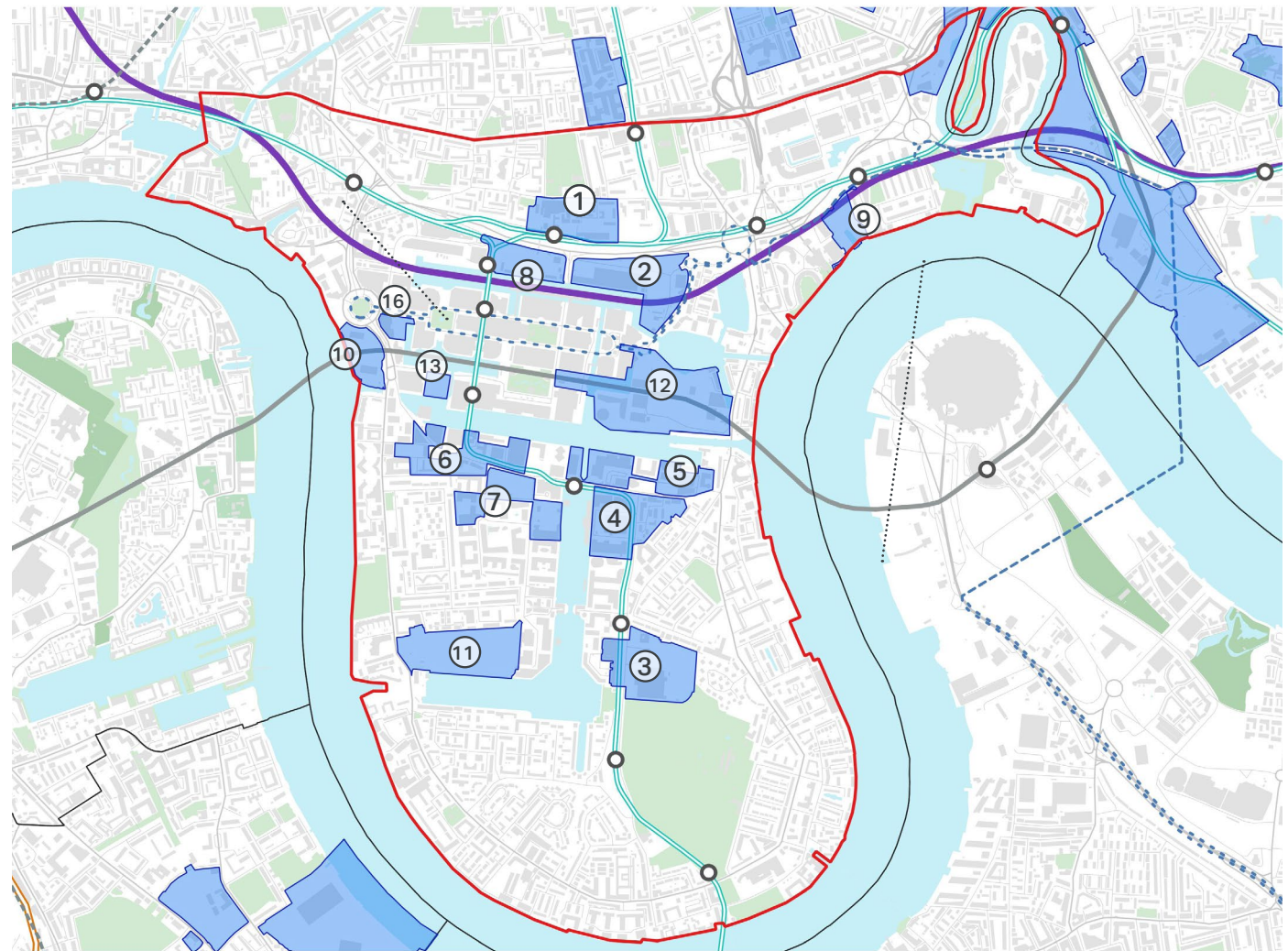
- Opportunity Area
- Approvals and Allocations (SHLAA, 2017)

Isle of Dogs and South Poplar

Site allocations: Emerging Tower Hamlets Local Plan

- Since SHLAA 2017, progress has been made in terms of plan making in the OA, with Tower Hamlets working on their new local plan (Regulation 19), which are shown on the map.

- ① **Aspen Way:** 780 homes, 21,000sqm educational floorspace, 2,000sqm other non-residential floorspace
- ② **Billingsgate Market:** 3,000 homes, 66,000 sqm commercial floorspace, 23,000sqm retail floorspace
- ③ **Crossharbour:** 2,500 homes, 24,000 sqm commercial floorspace
- ④ **Limeharbour:** 1,900 homes, 39,000sqm commercial floorspace
- ⑤ **Marsh Wall East:** 2,400 homes, 10,000sqm hotel floorspace, 3,300sqm educational floorspace, 45,000sqm commercial floorspace, 10,500sqm retail floorspace
- ⑥ **Marsh Wall West:** 2,625 homes, 1,000 student units, 800 co-living units, 1175 hotel rooms and serviced apartments

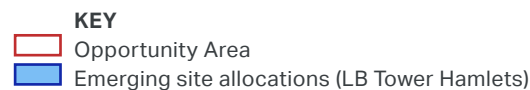
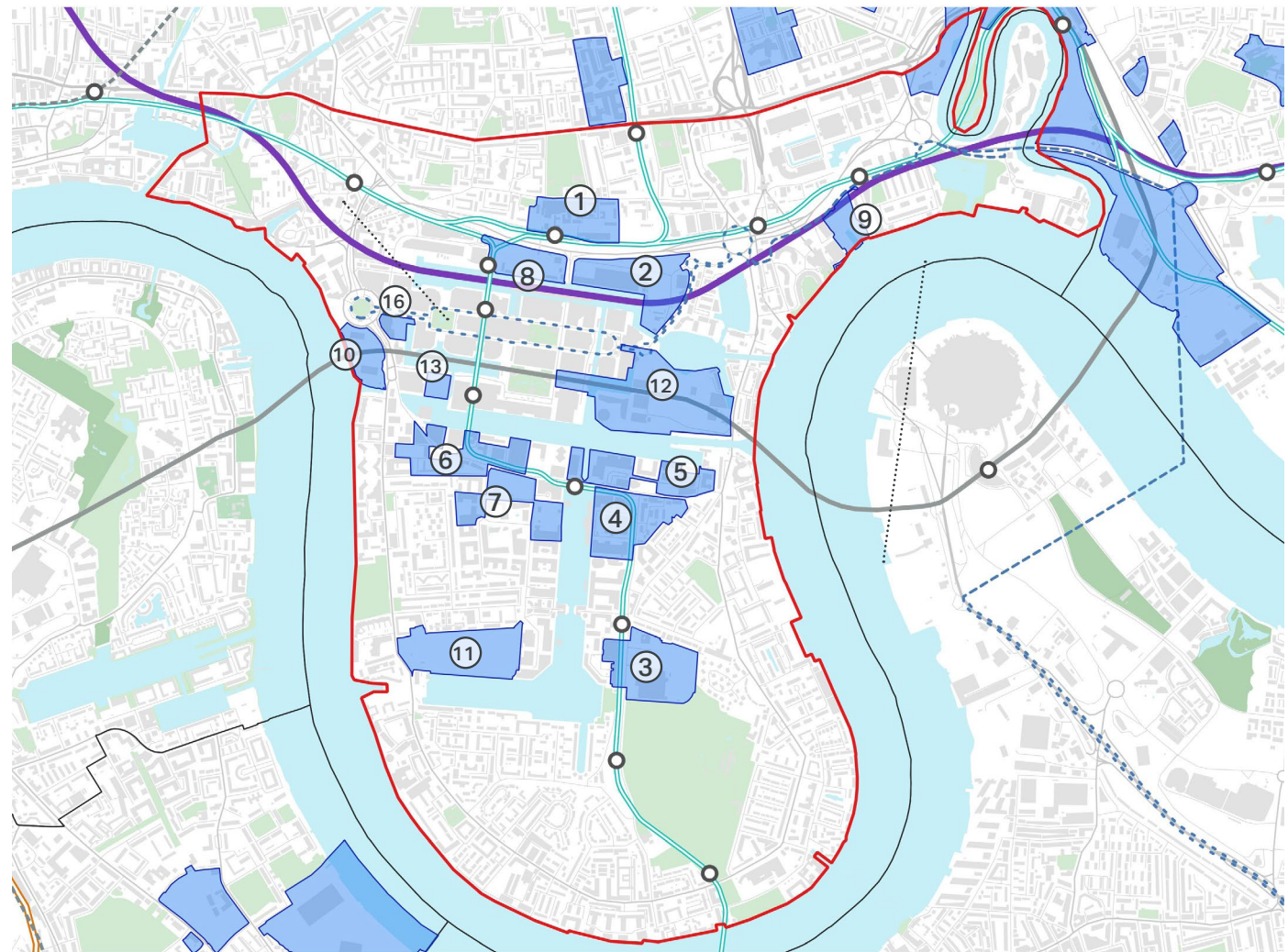


Isle of Dogs and South Poplar

Site allocations: Emerging Tower Hamlets Local Plan



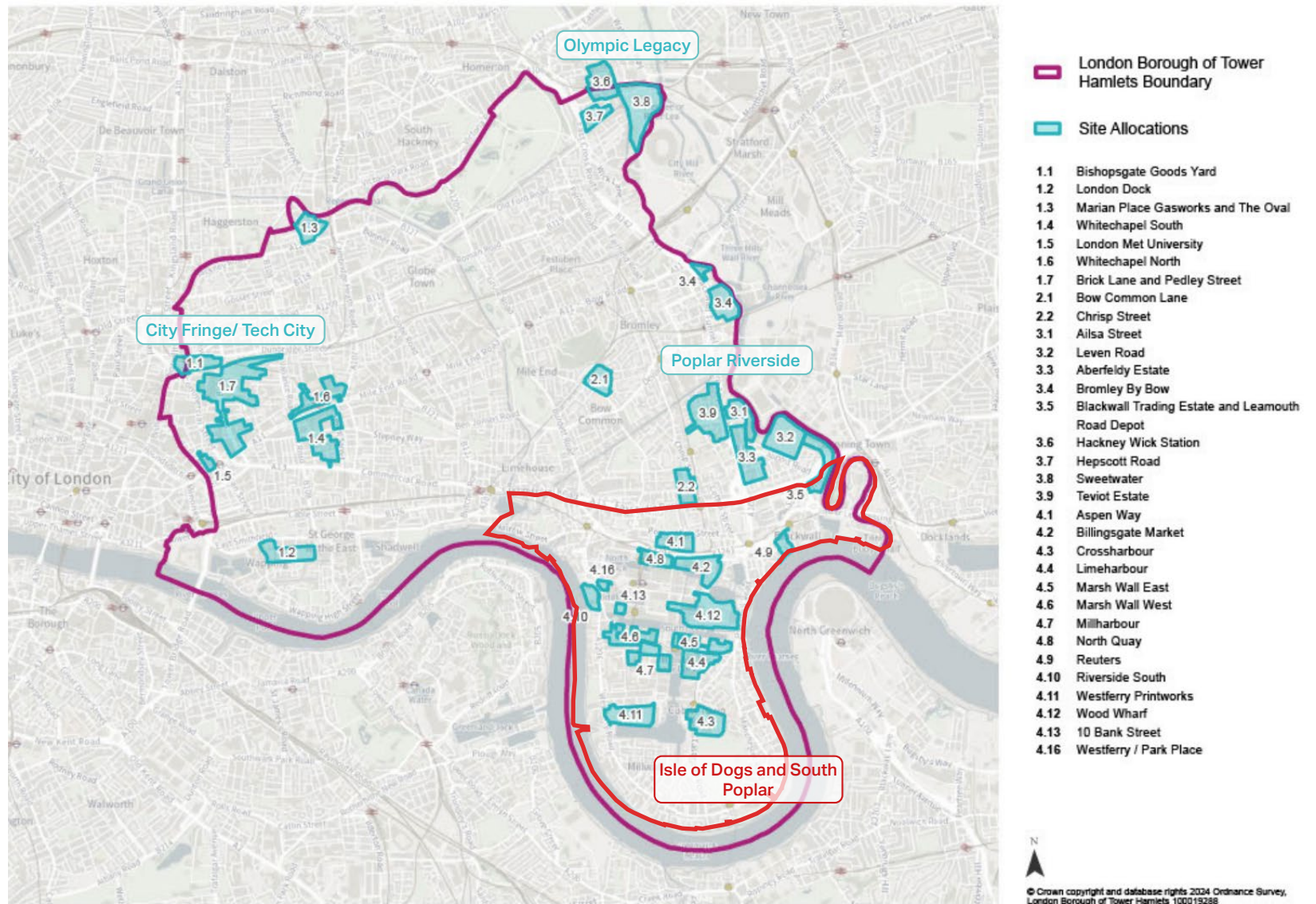
- ⑦ **Millharbour:** 1,700 homes, 6,000sqm non-residential floorspace, 3,500sqm educational floorspace
- ⑧ **North Quay:** Up to 1,250 homes, at least 160,000sqm non-residential uses
- ⑨ **Reuters:** 900 homes, 2,250sqm commercial uses and public house
- ⑩ **Riverside South:** 1,650 homes, 56,000sqm commercial floorspace
- ⑪ **Westferry Printworks:** 950 homes, 14,500sqm educational floorspace, 2,000sqm commercial floorspace, 4,000sqm community floorspace, 1,500sqm retail floorspace
- ⑫ **Wood Wharf:** 3,600 homes, 165-265,000sqm of commercial floorspace
- ⑬ **10 Bank Street:** 575 homes, 41,000sqm commercial/town centres floorspace
- ⑯ **Westferry and Park Place:** 550 homes, 19,000sqm commercial/town centre floorspace



Isle of Dogs and South Poplar

Site allocations: Emerging Tower Hamlets Local Plan

- Isle of Dogs and South Poplar OA will accommodate **more than 25,000 new homes (almost 50% of the homes that TH seeks to deliver by 2038)**.
- 'By 2038, the Isle of Dogs and South Poplar will have a cohesive mix of housing, employment and leisure uses within distinctive, inclusive and vibrant neighbourhoods, which have a strong sense of place.'



[Tower Hamlets Regulation 19 draft for consultation](#)

Isle of Dogs and South Poplar

Development activity 2021



Source: vu.city

KEY
Consented
Under construction
Completed

Isle of Dogs and South Poplar

Development activity 2024



Source: vu.city

KEY

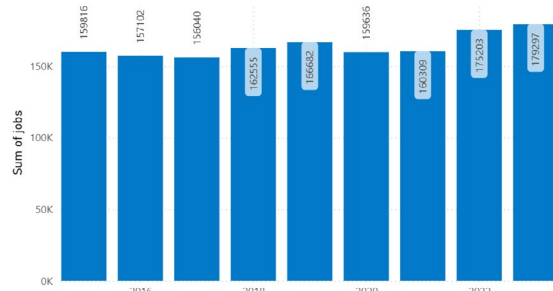
- Consented
- Under construction
- Completed

Isle of Dogs and South Poplar Jobs

- The OA is a hotspot for employment as shown in the jobs density diagram on this page.
- In 2023, there were 335,000 jobs in LB Tower Hamlets, with 180,000 (**54 per cent**) being in the OA.



Jobs by year in the OA

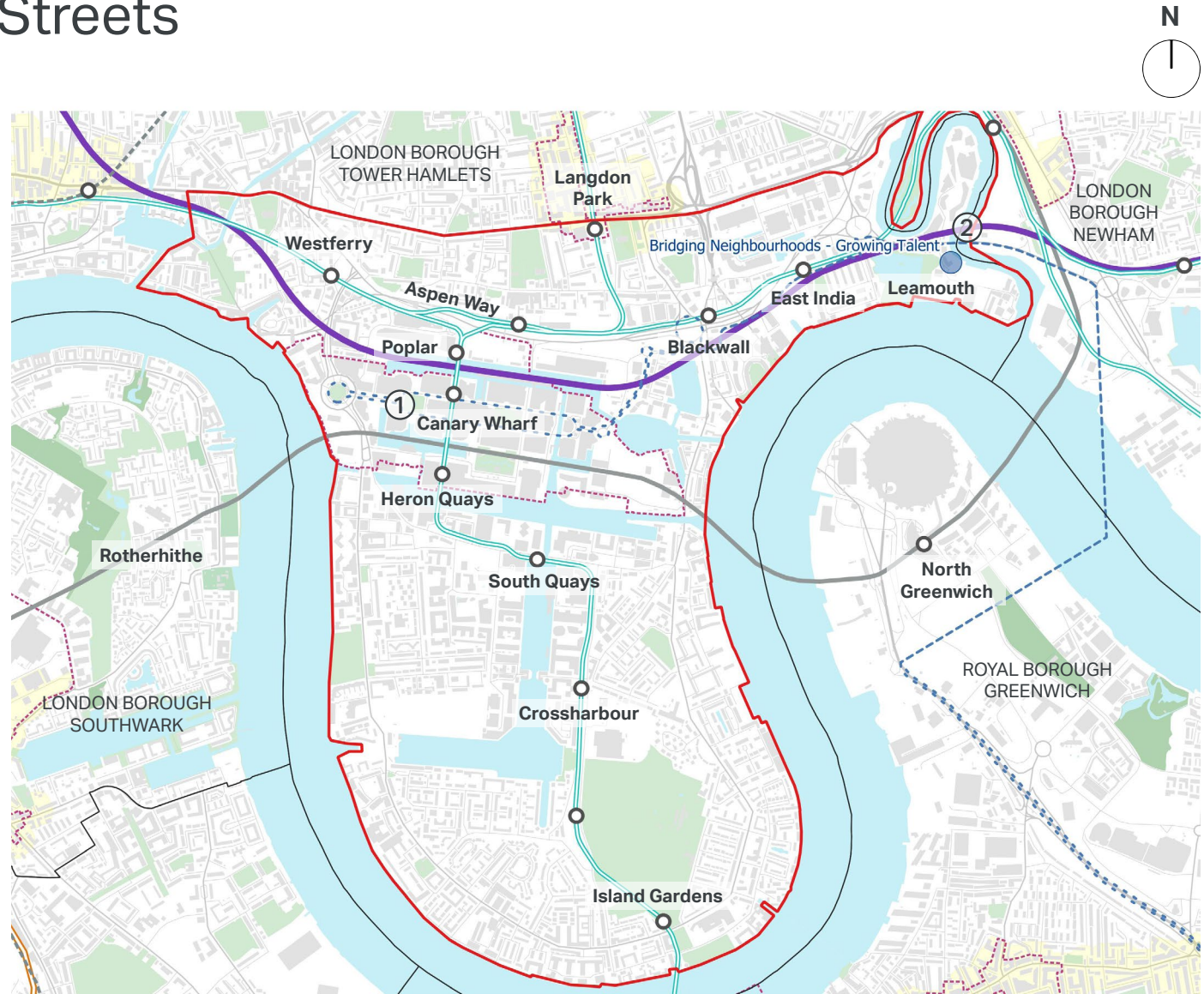


Source: Census, Business Register

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

Isle of Dogs and South Poplar Town Centre and High Streets

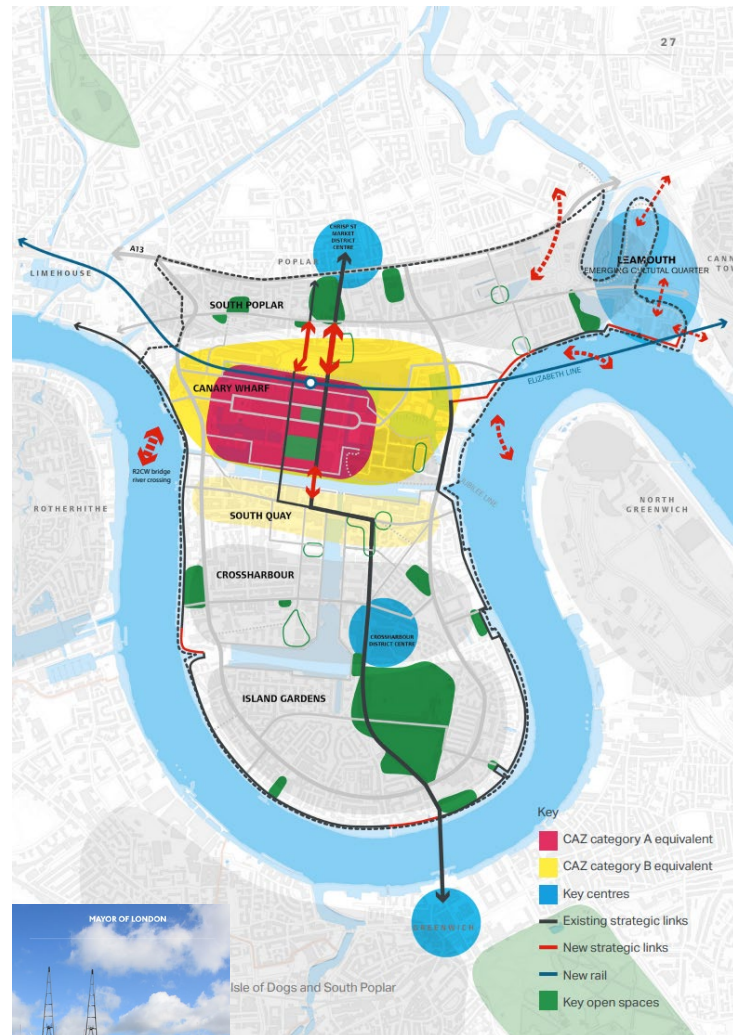
- Bridging Neighbourhoods, Growing Talent project: skills programme that will provide training, apprenticeships, volunteering and learning opportunities for 4,000 Londoners over the next three years



- KEY**
- Town Centre
 - High street
 - Good Growth Funded project (Round 1 to 3)

Isle of Dogs and South Poplar Place strategies: OAPF (2019)

- The Isle of Dogs & South Poplar OAPF was adopted by the Mayor of London on Monday 14 October 2019.
- Unique amongst London's Opportunity Areas, the Isle of Dogs and South Poplar is currently experiencing intense development pressure, mainly in the form of new, very high density housing.
- The Isle of Dogs and South Poplar has considerable potential to grow and deliver many of the homes and jobs that London needs, but unlike some other opportunity areas, it also has established residential and commercial communities, and the views of these communities on the impacts of growth are important to take into account.
- **Growth should benefit existing communities** and this OAPF sets out a strategy to break down barriers and increase access to opportunities between the Isle of Dogs and South Poplar.



Source: [The Isle of Dogs & South Poplar OAPF](#)



Isle of Dogs and South Poplar

Place strategies: South Poplar Masterplan SPD (2021)

- The South Poplar Masterplan SPD provides supplementary guidance to ensure the vision and objectives set out in the Local Plan and Isle of Dogs and South Poplar Opportunity Area Planning Framework are delivered.
- The SPD seeks to sustainably manage anticipated growth in the area, ensure appropriate public benefit is extracted from development opportunities and ensure that the benefits of growth is delivered and shared across the wider South Poplar community.
- The masterplan principles are described below:
 - **GREEN AND OPEN SPACE:** The masterplan site has the unique opportunity to connect existing green spaces as well as provide significant new green and open spaces.
 - **HERITAGE AND CULTURE:** The South Poplar and Canary Wharf area has a rich maritime history stemming from its strategic location as a key trading route to the east from Central London.
 - **LIVEABILITY:** Creating healthy, 'liveable' neighbourhoods and cities is increasingly becoming a global priority.
 - **USES AND MIX:** Tower Hamlets' vision for the wider area is to create a 'cohesive mix of housing, employment and leisure uses within distinctive, inclusive and vibrant neighbourhoods, which have a strong sense of place.
 - **CHARACTER AND IDENTITY:** The South Poplar masterplan will recognise the area's existing assets and provide a strong vision of what the area can look like in the future.
 - **CONNECTIVITY:** Connectivity is one of the key themes within the masterplan as it aims to enhance existing routes and connections throughout the area.

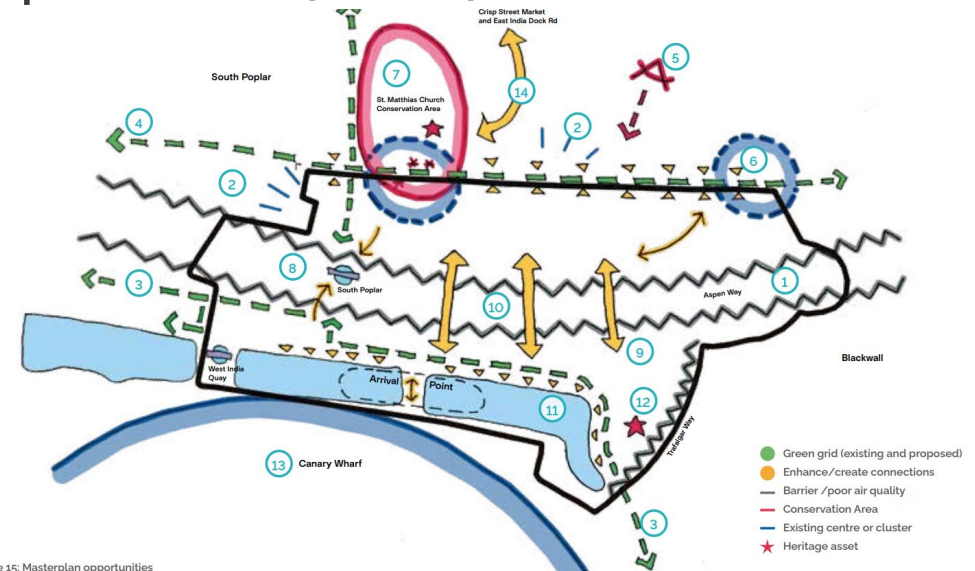


Figure 15: Masterplan opportunities



Source: [South Poplar Masterplan SPD \(2021\)](#)

Isle of Dogs and South Poplar

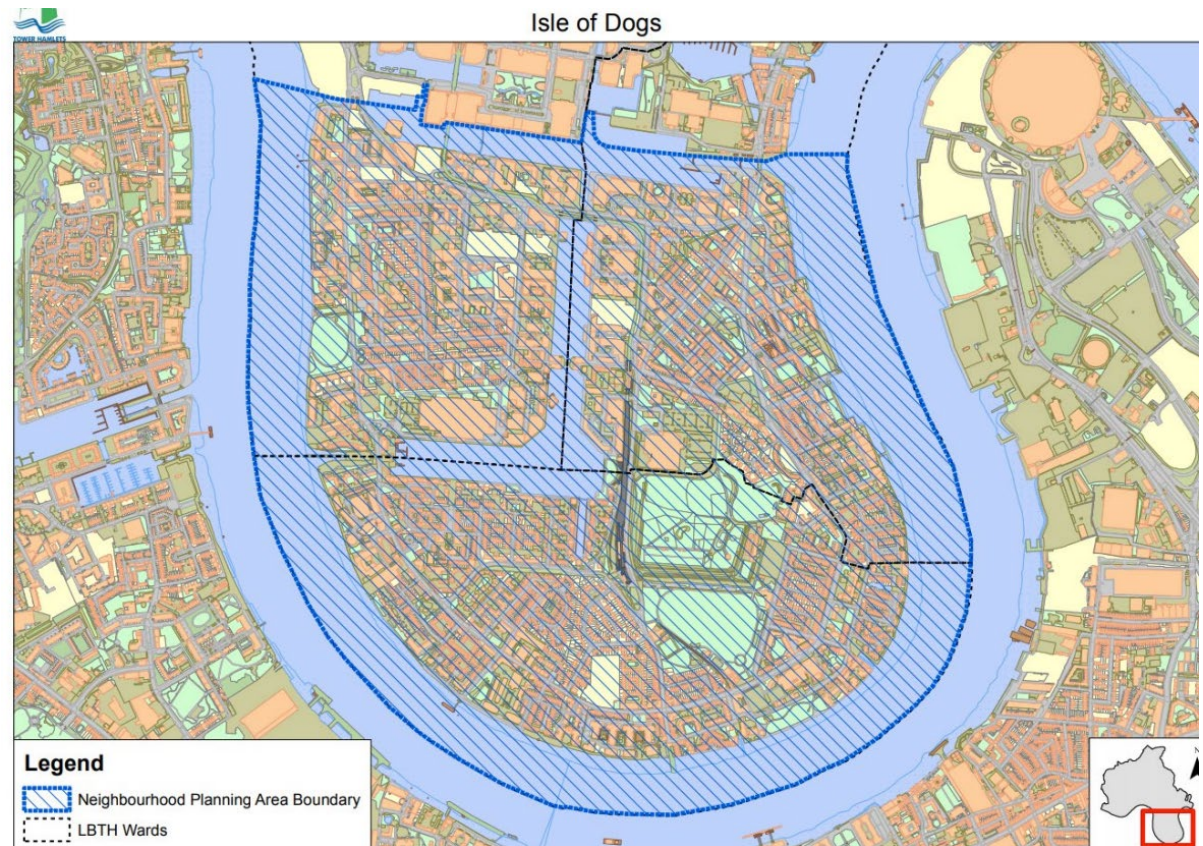
Place strategies: Isle of Dogs Neighbourhood Plan 2019 – 2031 (2021)

- The Isle of Dogs Neighbourhood Plan was formally made part of Tower Hamlets' planning policies on May 19, 2021, and the formal adoption took effect on July 1, 2021. The plan sets the vision for the neighbourhood:

"A liveable environment in which our diverse community can work, rest and play"

The Isle of Dogs is more than just a dormitory for Canary Wharf. It should be a destination in its own right, with everything people need on a daily basis within walking distance, and where we can imagine enjoying living and working at all stages of our lives.

Our vision is of a relaxed, quiet, safe and secure home, that has the best of London on its doorstep, but uses its island location to create something unique and special. We want to maximise enjoyment of our very special access to the river and docks, and enhance and grow our green spaces. Our plans should work equally well for all residents regardless of age, income or other characteristics, and at any time of the day or night. We need to plan for the whole Area to work together seamlessly.

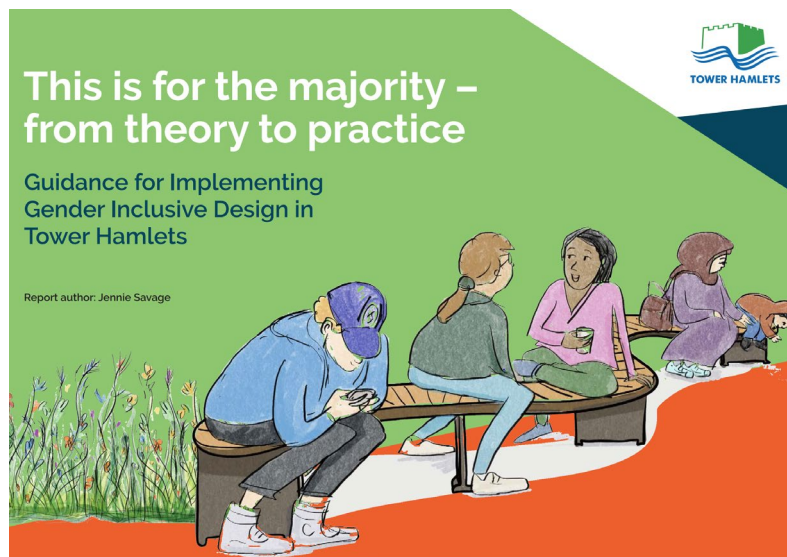


Source: [Isle of Dogs Neighbourhood Plan 2019 – 2031 \(2021\)](#)

Isle of Dogs and South Poplar

Area wide guidance: This is for the majority

- 'This is For The Majority' is an evidence base and set of recommendations to support the inclusive design policy in the new Local Plan (PS5).
- Findings from the evidence have been aggregated through some of the policies of the Local Plan and consulted on through Reg 18 and Reg 19.
- Whilst this document is written to inform design and planning across the borough it is envisaged as useful tool for teams working with violence against women & girls team (VAWG), youth service, community safety provision and strategic planning for public health, high streets, parks and green spaces, leisure and planning for new developments.



Source: [This is for the majority - from theory to practice](#)

Isle of Dogs and South Poplar

Moving forward

Homes delivery

- **Highest delivery rate by year across all London's OAs.** Isle of Dogs has delivered an average of 1,974 homes by year, against an indicative rate of 1,300 homes by year.
- A suite of **OA specific documents** supporting the delivery of new homes, jobs and infrastructure, including the Isle of Dogs OAPF (2019), South Poplar Masterplan SPD (2021).
- Tower Hamlets is now consulting on the Regulation 19 of their Local Plan, which identifies a significant number of homes in the OA (25,000 new homes by 2038).
- Key sites include: Billingsate Market, Westferry.

Economy

- There has been a significant focus on jobs in the OA, with the London Plan identifying a capacity for 110,000 new jobs by 2041, and LESD increasing this number to 125,900.
- **Since 2019, there has been a loss of jobs in the OA.** However, worth noting that jobs in the OA account for more than 50 per cent of the jobs in the borough.
- **Increasing momentum in life sciences.** For example, One North Quay designed by KPF will deliver 76,456 m2 floorspace for research/ healthcare.

Challenges

- Northern Isle of Dogs (NIoD) and Canary Wharf recovery: **Shift in balance from employment to resi.**
- **Deliver new and improved open and water spaces, which are accessible** and well integrated into new development.

Proposition/ Lines of enquiry

- No change in the OA status ('underway').
- Support in describing and achieving shift in balance from employment to residential.
- Delivery of adequate, attractive and inclusive open spaces and social infrastructure.



KPF - One North Quay proposal