

# Opportunity Area Portrait

## Olympic Legacy



# 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.

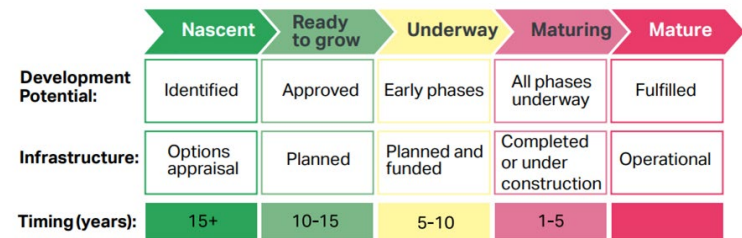
#### OA boundaries

- 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

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Transport  
and  
connectivity

Delivery of  
homes

SHLAA 2017

Site  
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Development  
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Jobs

Town Centre  
and High  
Streets

Industrial  
Land

Place  
strategies\*

Moving  
forward

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

# Olympic Legacy Context

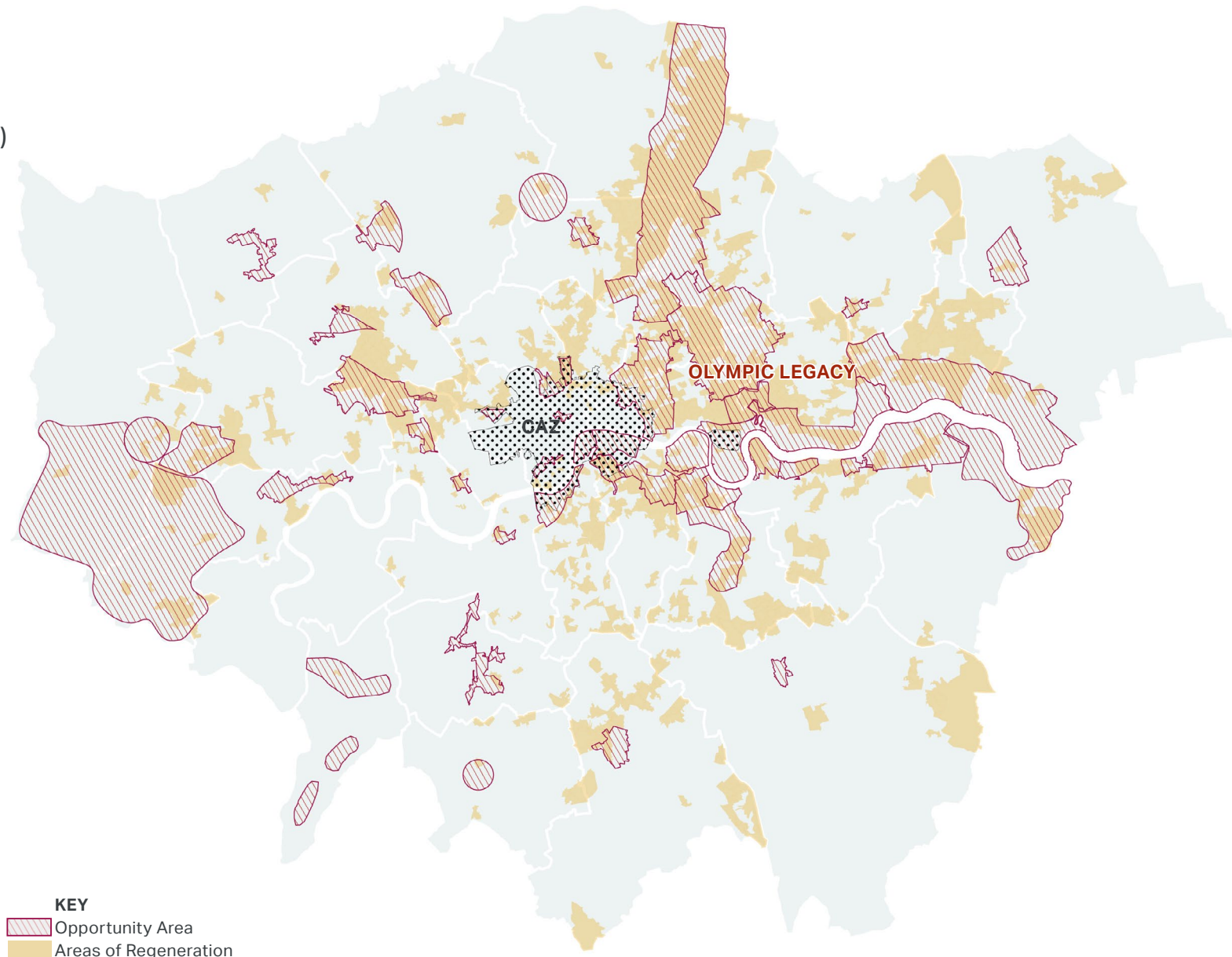
## OAs in the CAZ

- 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 OA is in the Elizabeth Line East Growth Corridor, but it has excellent transport links connecting it to the CAZ.

## Areas of Regeneration

The OA overlaps with areas of regeneration, as shown in the London Plan 2021, Figure 2.19 - Strategic Areas for Regeneration (based on 20 per cent most deprived lower super output areas in England).

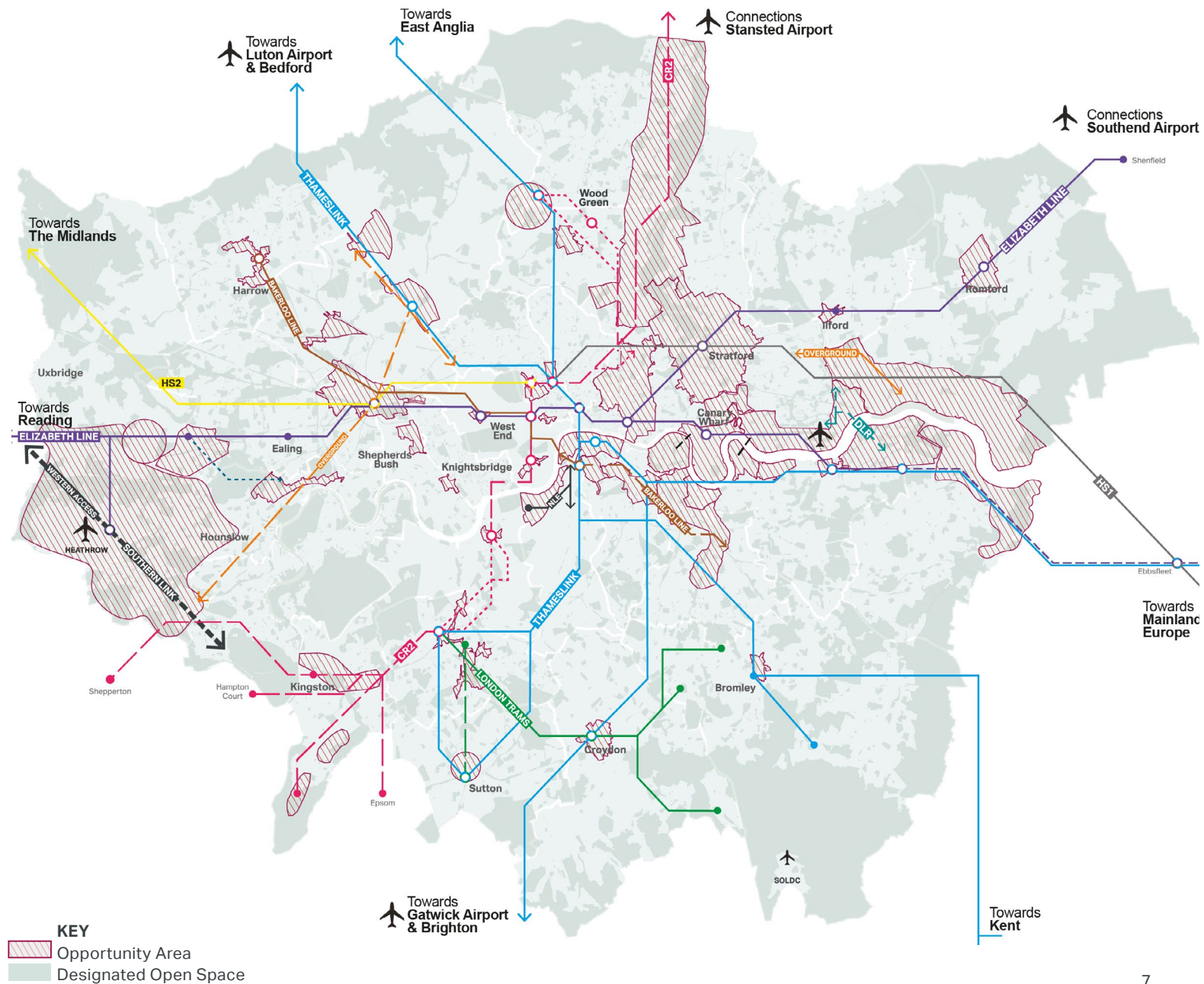


Source: Areas of Regeneration as per London Plan 2021

# Olympic Legacy Context

## Transport and Growth Corridors

- Elizabeth line opened since the adoption of the London Plan in 2021.



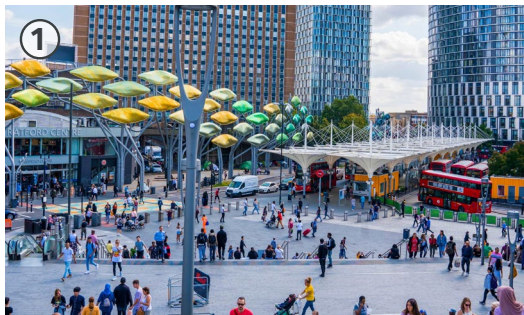


# Olympic Legacy Context

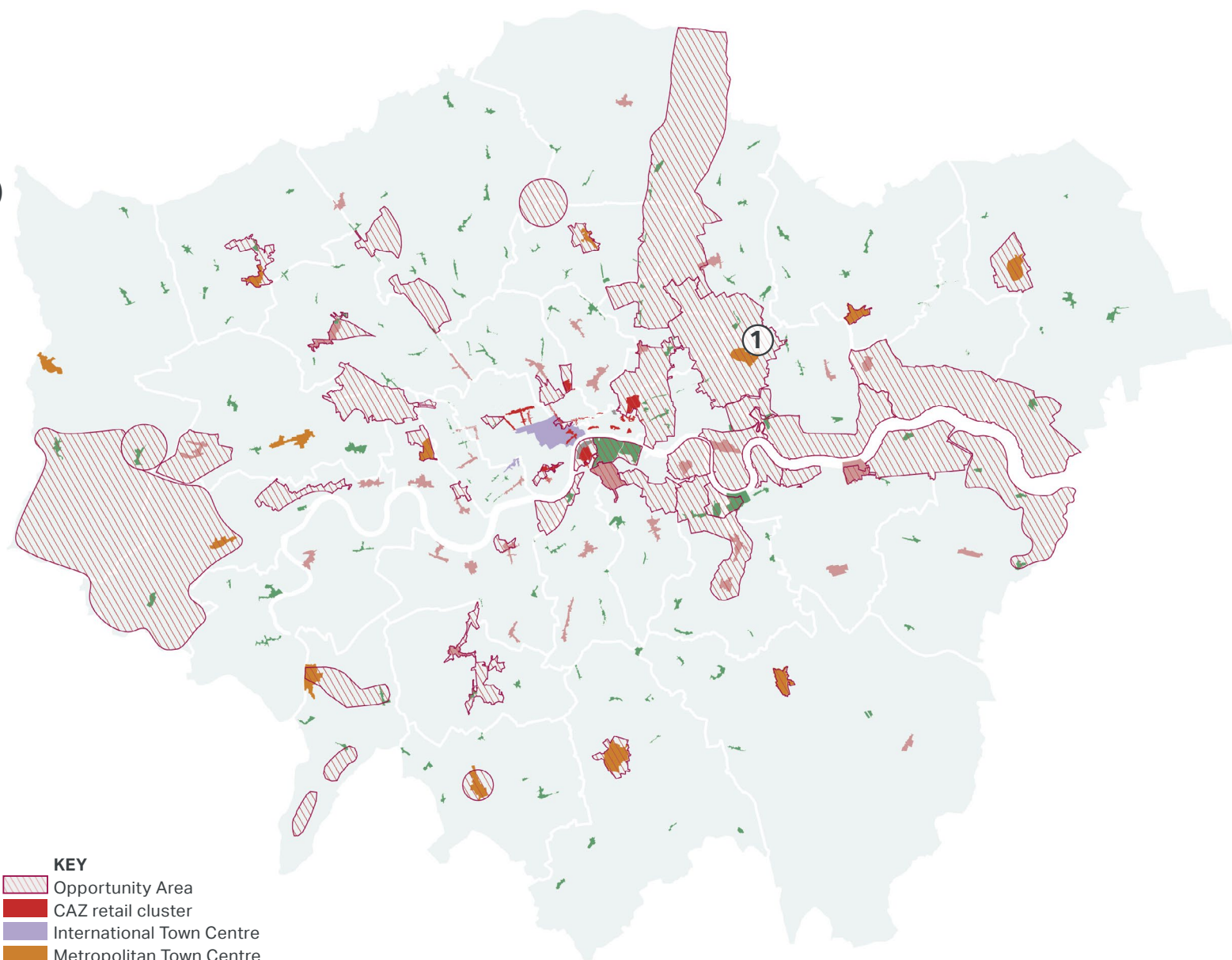
## OAs and Metropolitan Town Centres

- 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)

Stratford Metropolitan Centre is within the OA. Stratford has the potential to become an international centre.



Stratford Town Centre. Source: LB Newham



Source: [Planning Data Map](#)



# Olympic Legacy

## Key info

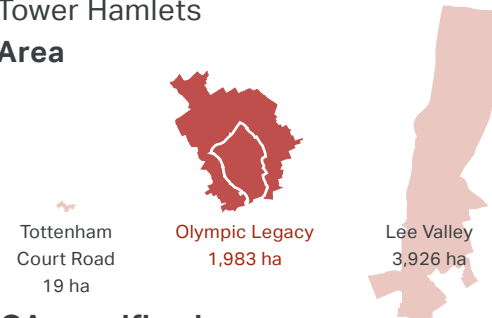
### London Plan Designation Year

2004*	2008	2011	2016	2021
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### Borough

Waltham Forest, Newham, Hackney, Tower Hamlets

### Area



### OA specific plans

Olympic Legacy SPG (2012).

### Local Plan status

- London Legacy Development Corporation Local Plan (adopted in 2020),
- Waltham Forest Local Plan Part 1 (adopted in 2024), and Part 2 (Site Allocations) was submitted to the Planning Inspectorate in December 2024.
- Newham Local Plan Regulation 19,
- Tower Hamlets Regulation 19
- Hackney Local Plan (Consultation not started)

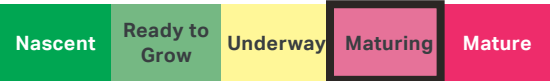
### Growth Corridor

Elizabeth Line East

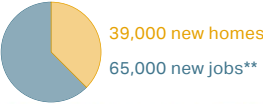
### Housing Delivery Test 2023

Waltham Forest (None), Newham (Presumption), Hackney, Tower Hamlets (Action Plan)

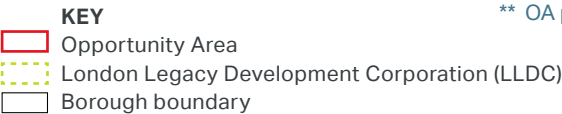
### OA status (London Plan 2021)



London Plan 2021 capacities by 2041



Source: Google Earth



\*Note that the LESD (2021) decreased the capacity to 34,700 new jobs

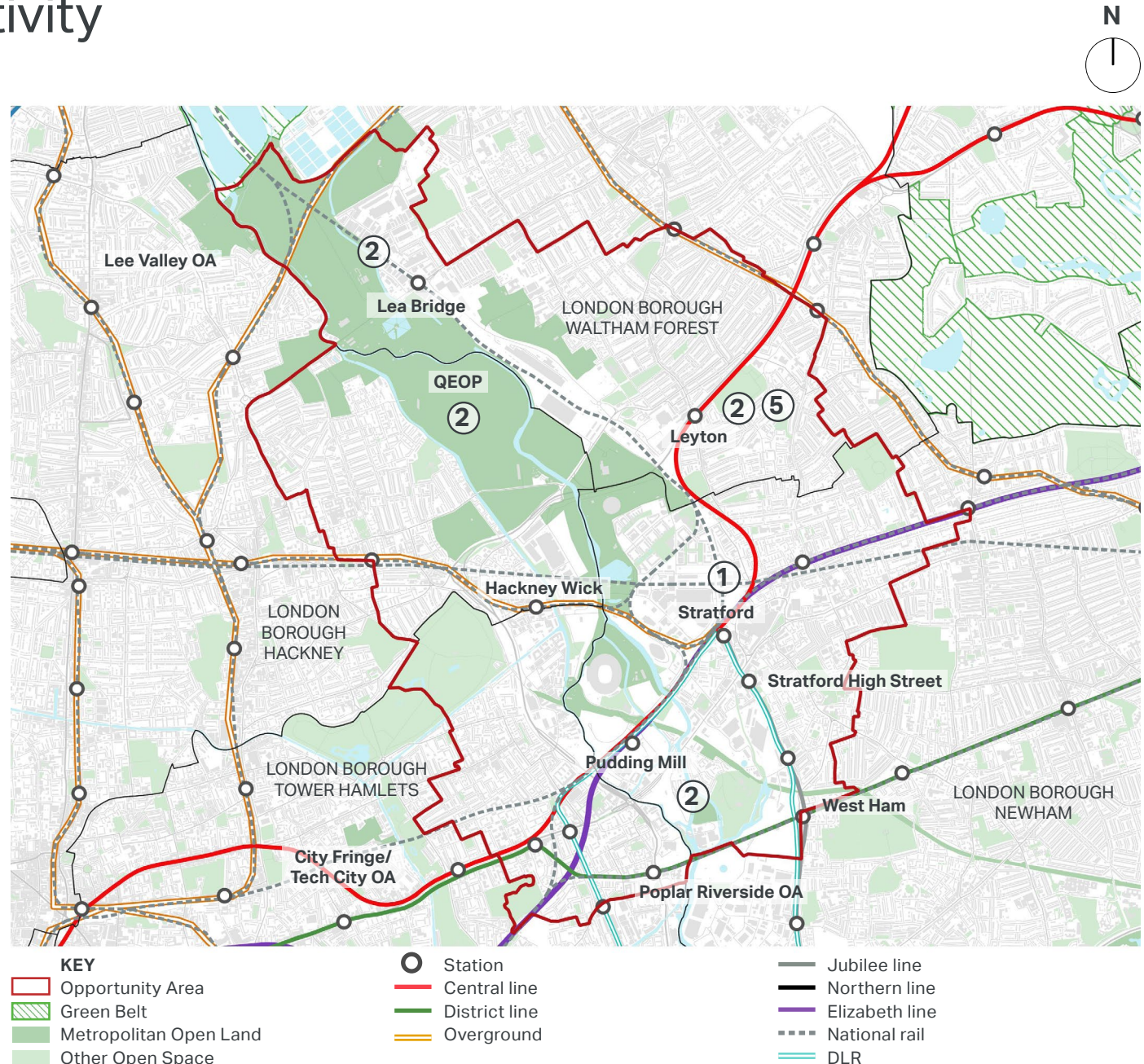
\*\* OA previously formed part of Lower Lea Valley OA (which was designated in 2004 and has been superseded by Olympic Legacy OA and Poplar Riverside OA).



# Olympic Legacy

## Transport and connectivity

- ① **The centre of the OA is well - connected** with a major multi-level interchange station (Stratford), and the Elizabeth Line opening fully in 2023.
- ② However, other parts of it experience **significant severance and connectivity concerns** (e.g. Leyton Mills, and local connectivity challenges across the river).
- ③ There is a need for significant investment to **link the major growth opportunities** at places like Leyton Mills into the **Queen Elizabeth Olympic Park (QEOP)** and **connections provided by Stratford and beyond** (e.g. pedestrian and cycle bridge over the railway line into QEOP and Ruckholt Road Station).
- ④ The boroughs have **developed strategies and planning documents** to address severance in parts of the OA and enhance the Stratford station quarter (See Relevant place strategies section).
- ⑤ **Leyton Station** received Levelling Up Fund for upgrades, including creating step-free access to each platform, a new ticket hall, concourse, bridge, and gate line.



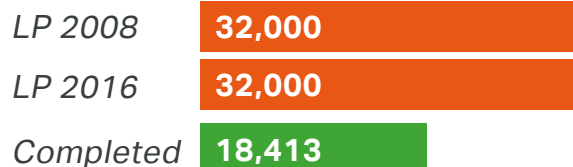


# Olympic Legacy

## Delivery of homes

### Delivery pre-2019\*

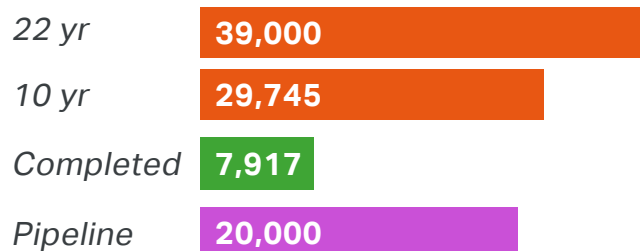
Completions since designation against capacity



The OA exceeded its original capacity at designation, and by 2019 delivered more than 60% of the indicative capacity for new homes by 2031 set in the London Plan 2016.

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

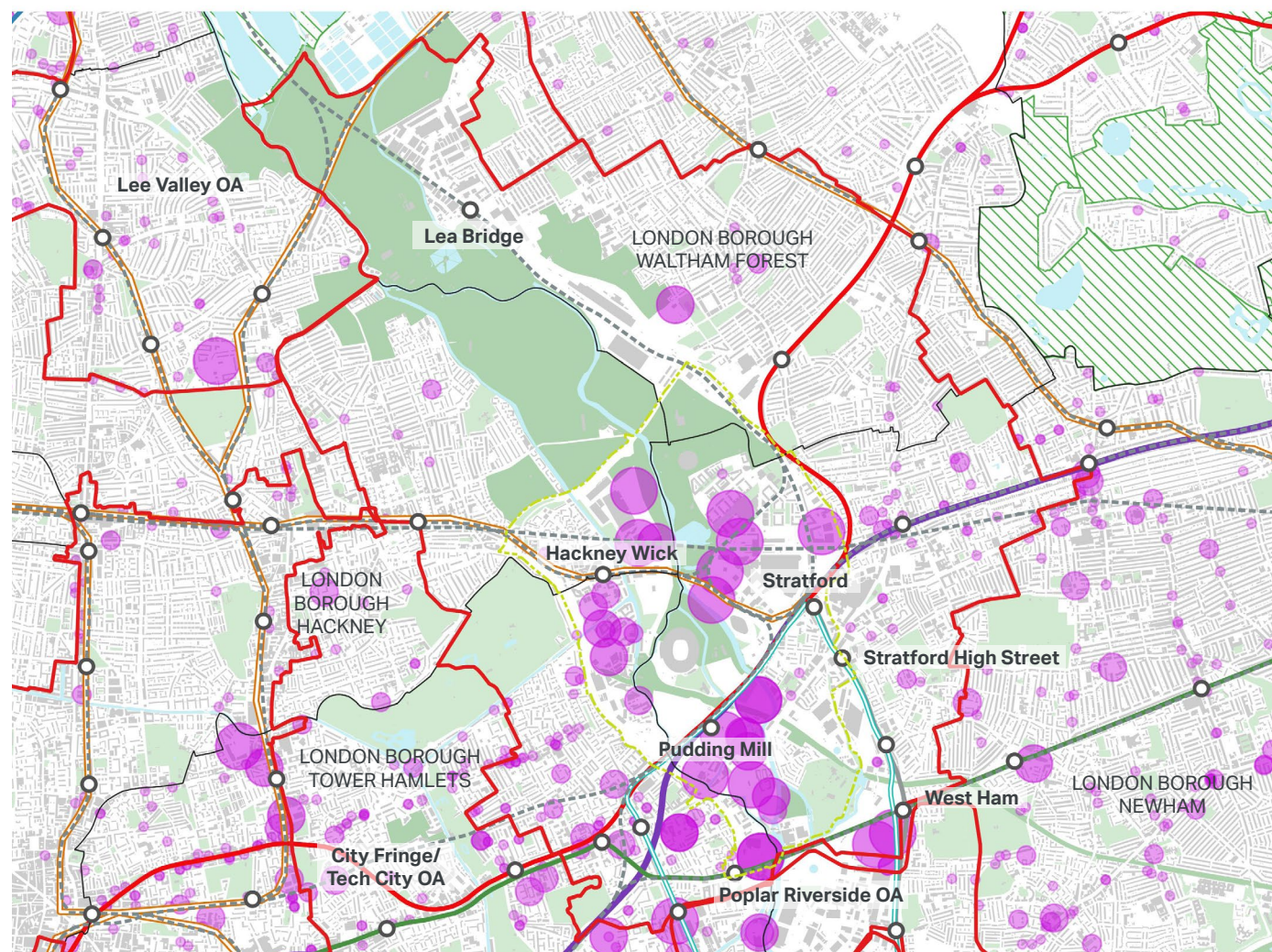
Progress against 22yr, 10 yr capacity



OA is delivering more than 1,600 homes per year, against the indicative delivery rate of 1,700 homes a year. It has the highest pipeline across London, and is on track to meet its indicative capacity.

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

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



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

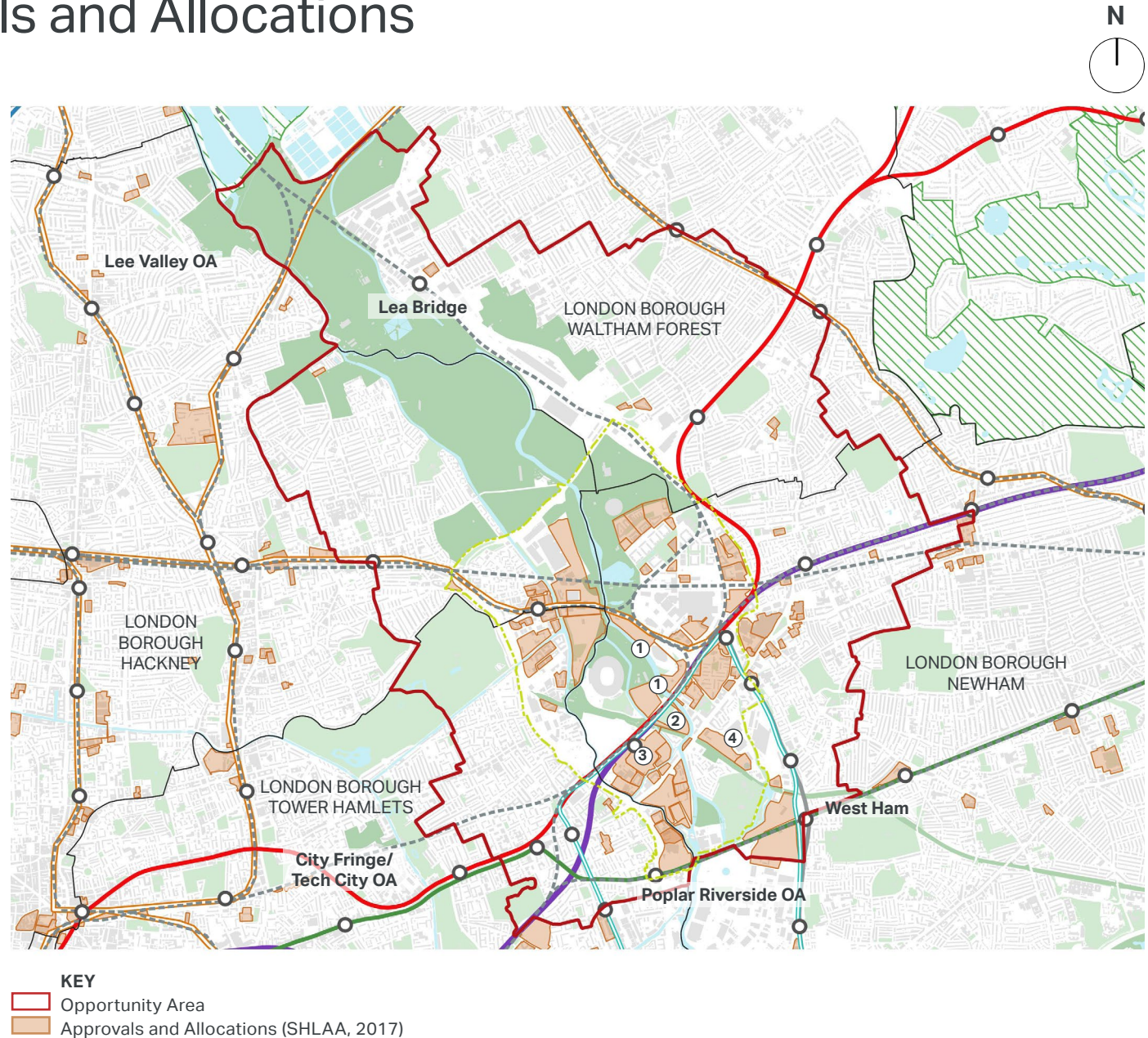
\*OA previously formed part of Lower Lea Valley OA (which was designated in 2004 and has been superseded by Olympic Legacy OA and Poplar Riverside OA).



# Olympic Legacy

## SHLAA 2017: Approvals and Allocations

- In 2012, LLDC secured Planning Consent for the Legacy Communities Scheme, a masterplan for new neighbourhoods across the Queen Elizabeth Olympic Park
  - Four of these sites, Stratford Waterfront, Bridgewater Triangle, Pudding Mill Lane and Rick Roberts Way form a Portfolio which will jointly deliver 50% affordable housing, secured under a S106 Agreement.
  - Unlocking these schemes would bring forward c.2,750 homes for start on site between 2024 and 2027
- ① Stratford Waterfront - c.700 Homes
  - ② Bridgewater Triangle - c.650 Homes
  - ③ Pudding Mill Lane - c.950 Homes
  - ④ Rick Roberts Way - c.450 Homes

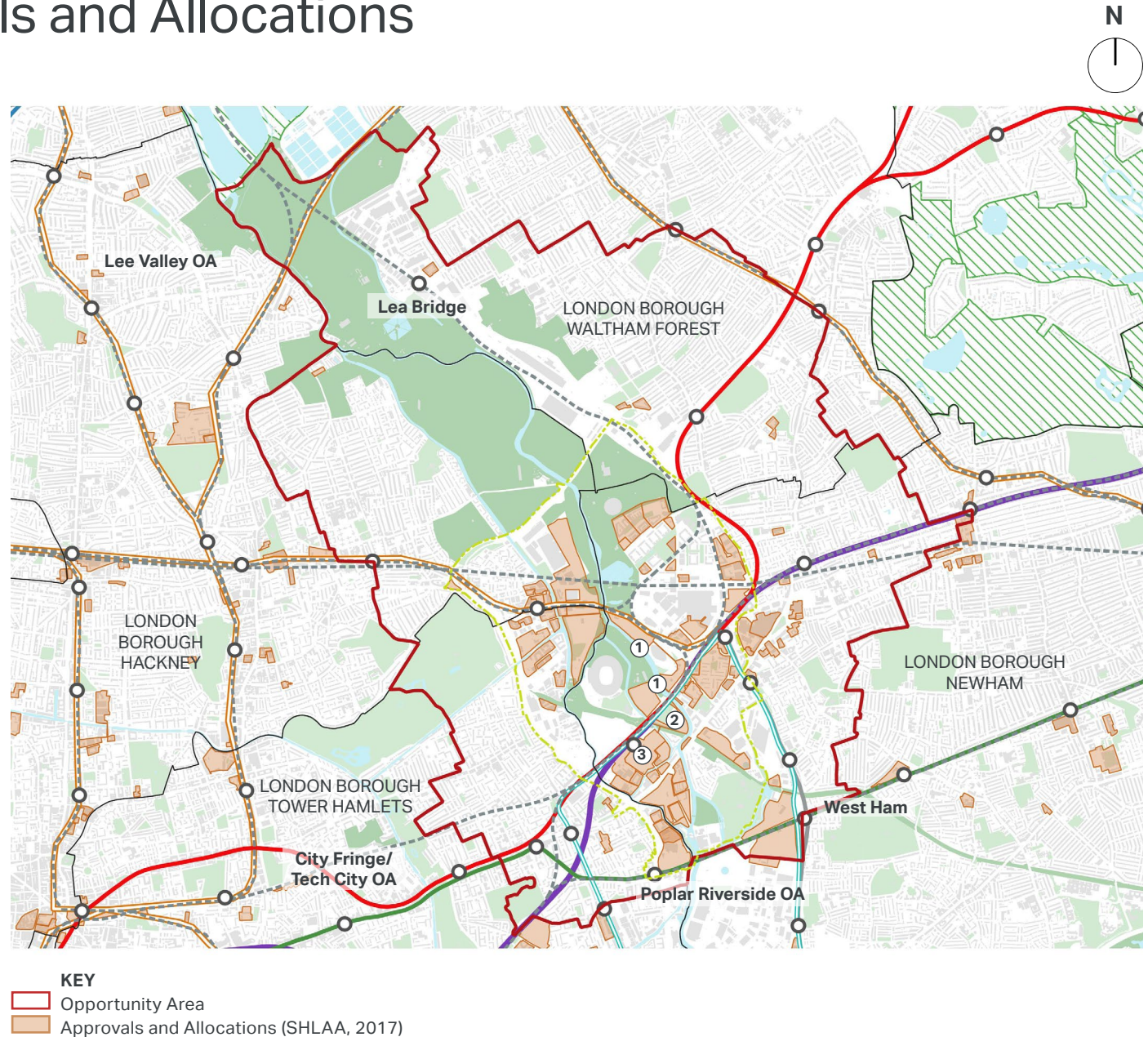




# Olympic Legacy

## SHLAA 2017: Approvals and Allocations

- ① Stratford Waterfront and Bridgewater are co-dependent due to Occupational Restrictions across the sites.
- ② Land known as Bridgewater Triangle: Site cleared but not under construction. Site redesigned to incorporate second staircase.
- ③ Pudding Mill: Not commenced. Permission in outline. Procurement for JV partner recently undertaken.

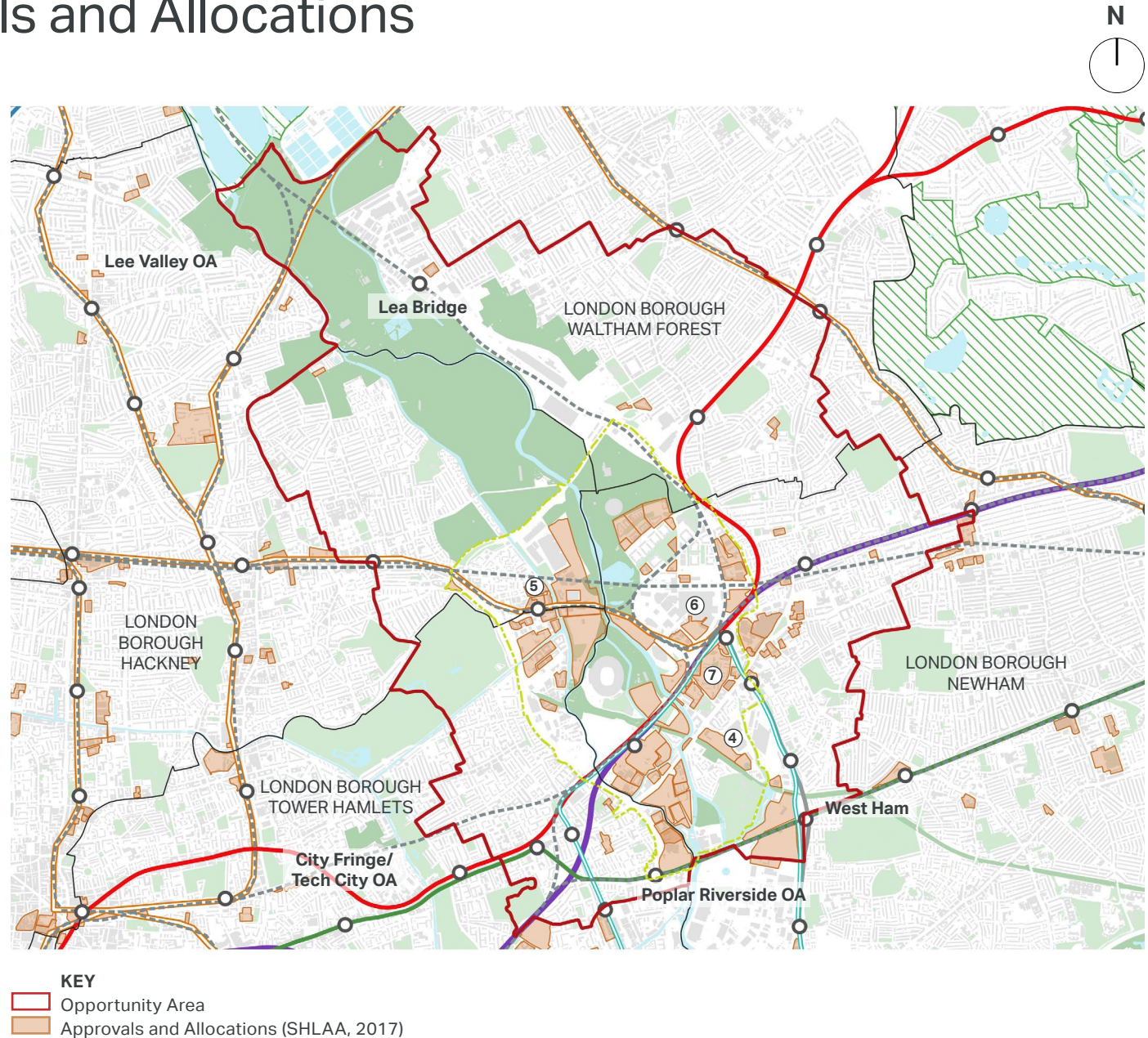




# Olympic Legacy

## SHLAA 2017: Approvals and Allocations

- ④ Rick Roberts Way is in the final stages of development partner procurement.
- ⑤ Hackney Wick Central: 877 new homes, 28 per cent affordable. Under construction. Development commenced on other permissions within site.
- ⑥ Cherry Park, Stratford City: 1224 new homes, 19 per cent affordable. Under construction.
- ⑦ Carpenter's Estate Regeneration approved by the planning committee in 2024. 2,022 homes, 50 per cent social rent. and 10,000 sqm commercial space.

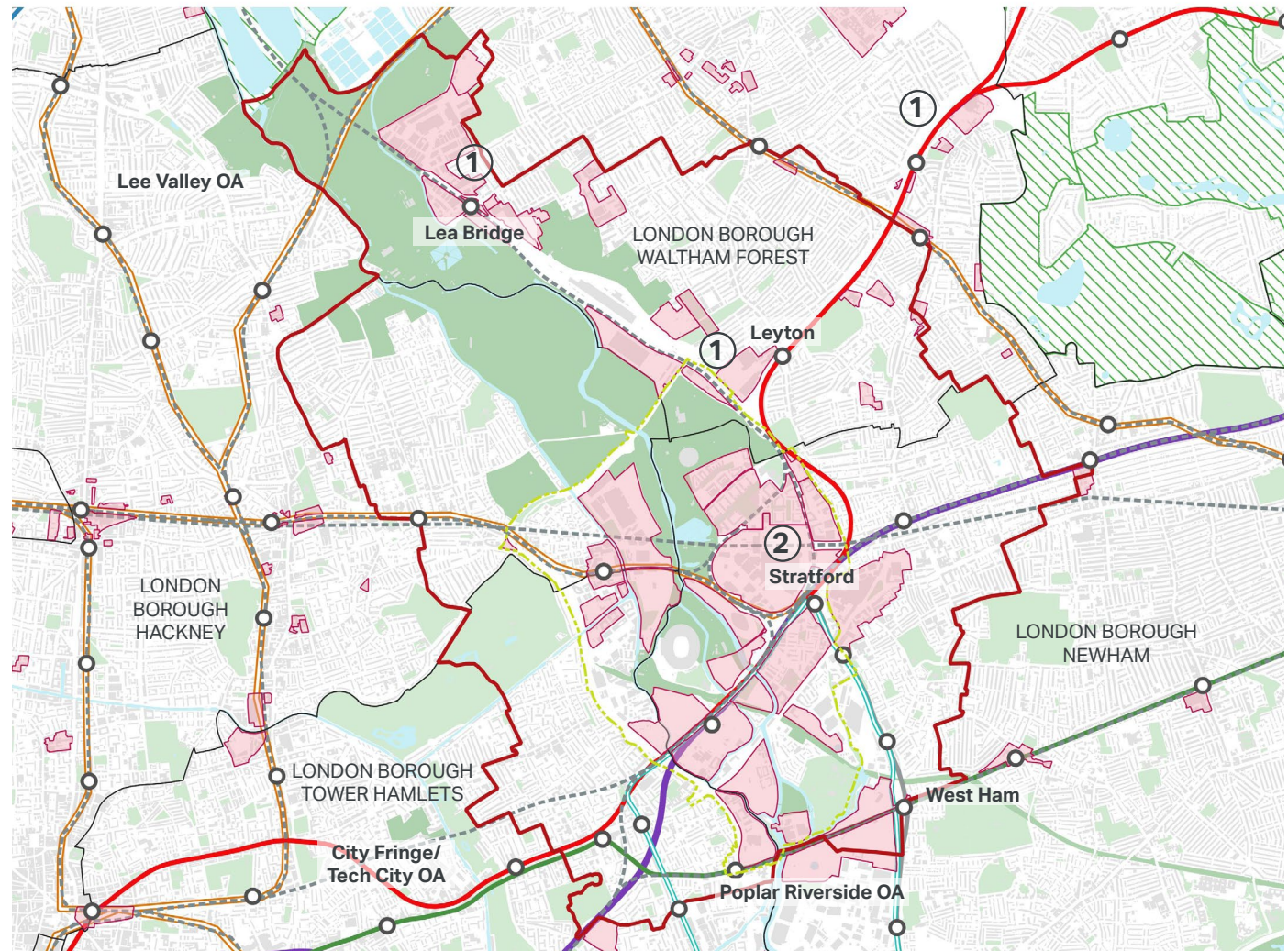




# Olympic Legacy

## Site allocations: Local Plans

- Since SHLAA 2017, progress has been made in terms of plan making in the OA, with emerging and adopted plans highlighting new development sites or carrying forward ones that have not been delivered.
- The diagram shows the:
  - Adopted site allocations in Waltham Forest
  - Regulation 18 and 19 for Tower Hamlets and Newham.
- Key observations (compared to SHLAA 2017):
  - ① Clusters of sites around Lea Bridge, Leyton, Leytonstone.
  - ② Stratford station as an allocated site for development.





# Olympic Legacy

## Development activity 2021



Chobham Manor



Source: vu.city

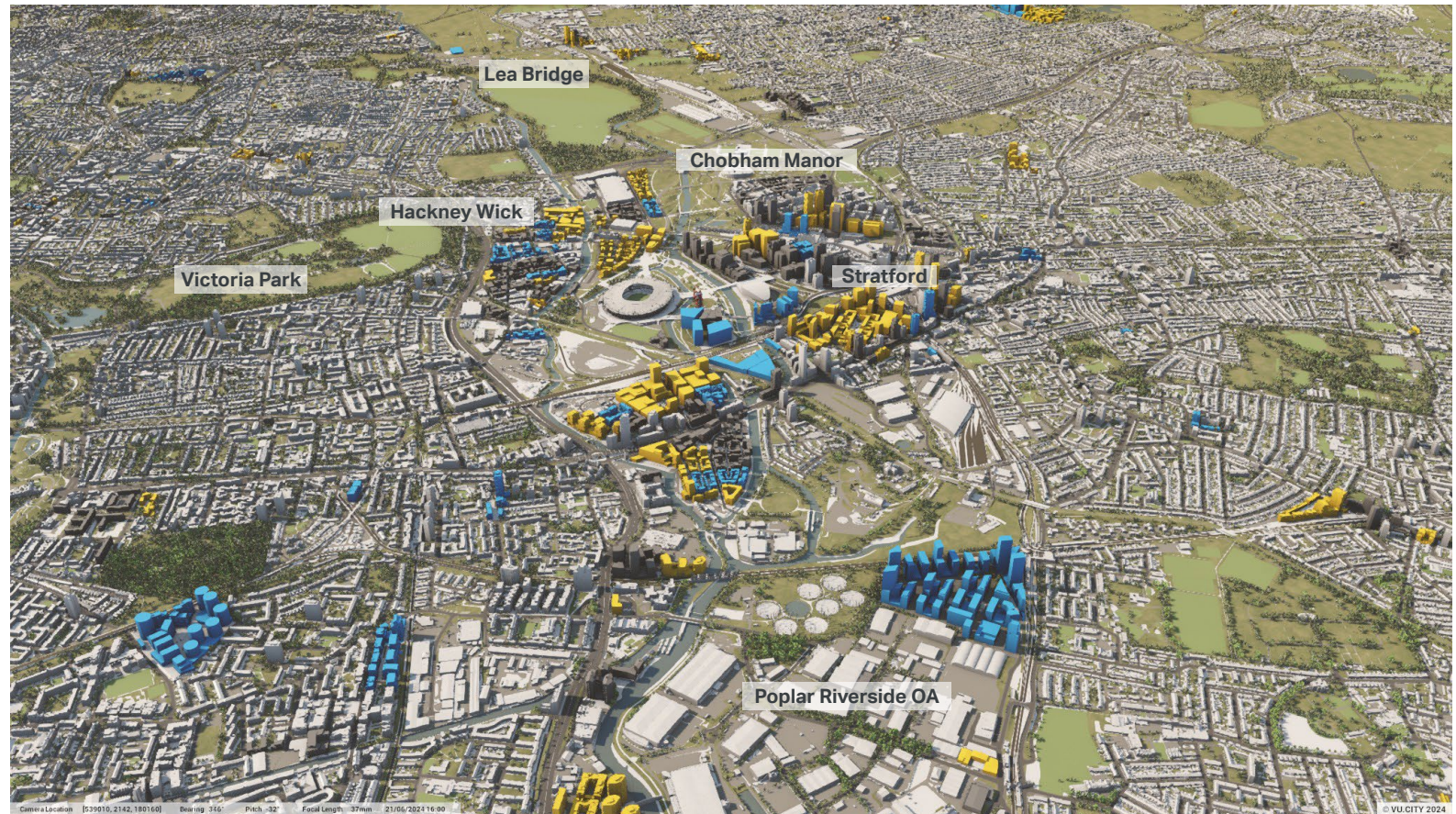
- KEY**
- Consented
  - Under construction
  - Completed



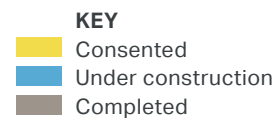
# Olympic Legacy

## Development activity 2024

- High development activity with many strategic sites being either completed or under construction.



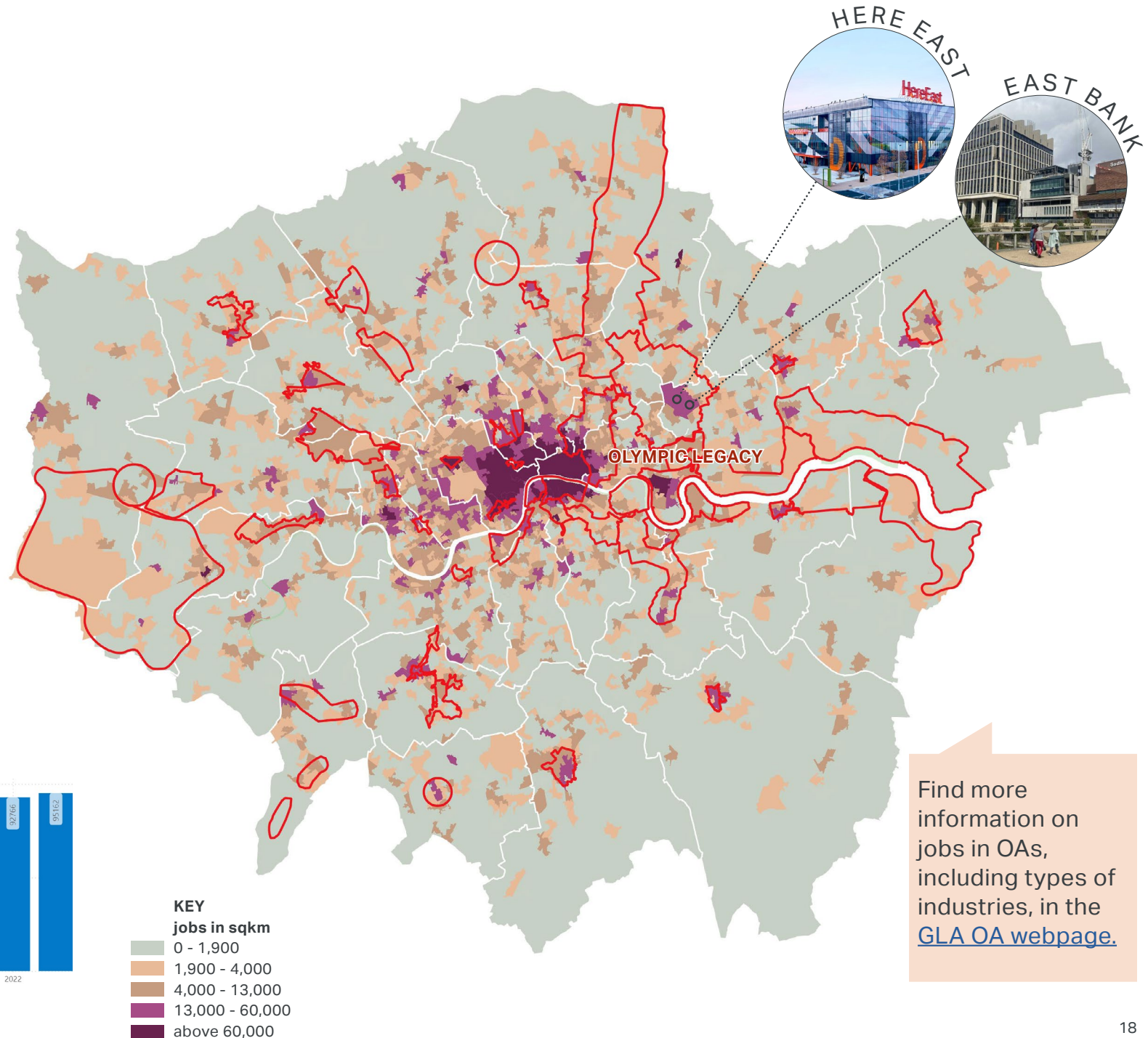
Source: vu.city





# Olympic Legacy Jobs

- Olympic Legacy is an important employment and retail location, and came fourth across London OAs in 2023 by number of jobs.
- Queen Olympic Elizabeth Park is an innovation district, including Here East; a dedicated campus in Hackney that is home to global organisations, start ups, and universities.
- The diagram shows high density of jobs in Stratford. A hot spot outside the CAZ.



Source: Census, Business Register



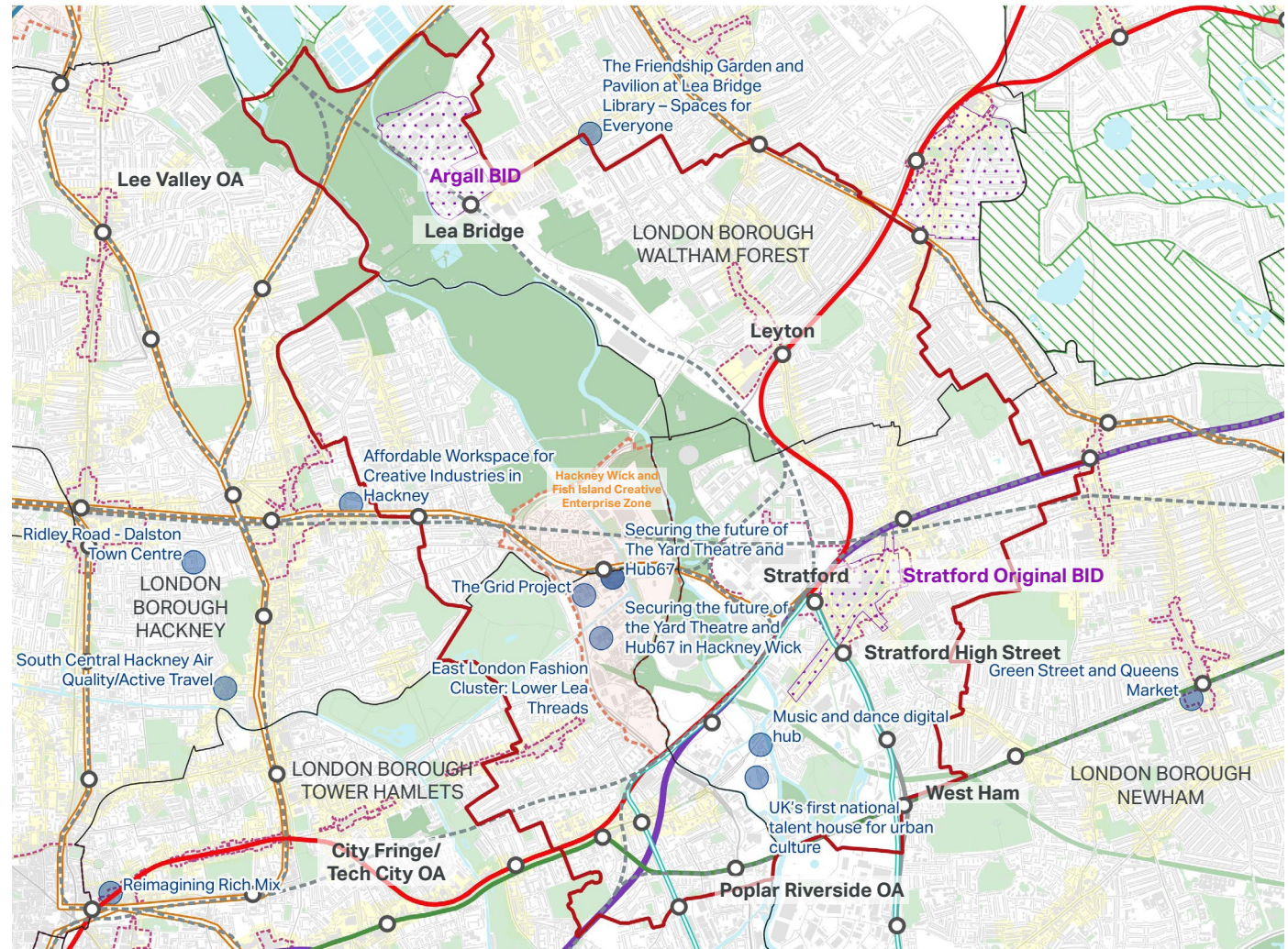
# Olympic Legacy

## Town Centres and High Streets

- A number of Town Centres and High Streets within the OA.
- Hackney Wick and Fish Island (HWFI) CEZ focusses on protecting one of the world's most recognisable 'at risk' communities of creators.
- Aspiration for Stratford to become an international centre.



Hackney Wick



### KEY

- Town Centre
- High street
- Business Improvement District (BID)
- Good Growth Funded project (Round 1 to 3)



# Olympic Legacy

## Protected Industrial Land

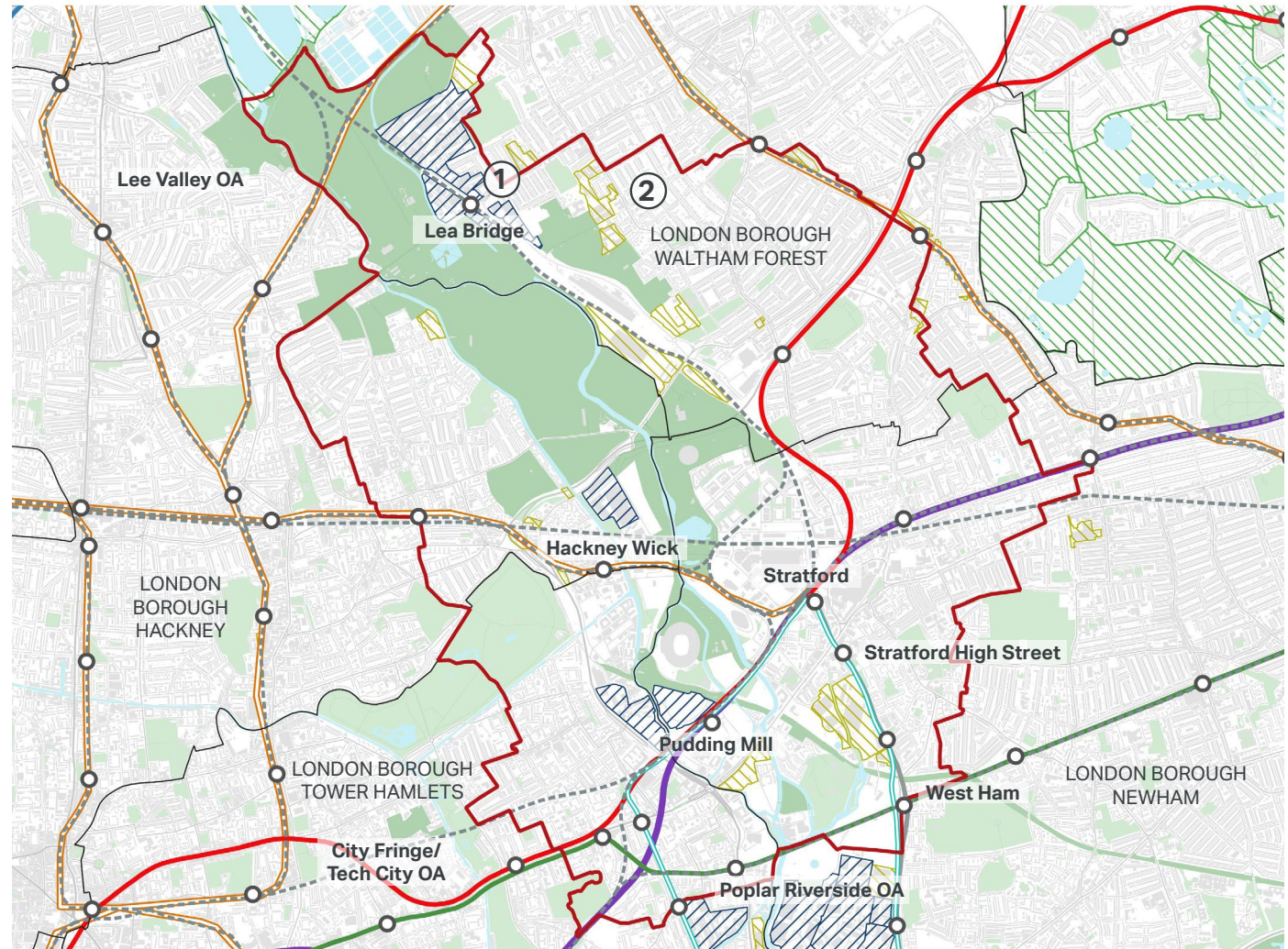
- 3.12 per cent of the OA is identified as Strategic Industrial Land (SIL).
- 2.87 per cent of the OA areas is Locally Significant Industrial Sites (LSIS).

① [Lea Bridge Gateway](#) industrial masterplan in progress.

② [Estate Way industrial masterplan](#) (2023).



Lea Bridge



Source: [Planning Data Map](#)





# Olympic Legacy

## Industrial land: Types of uses

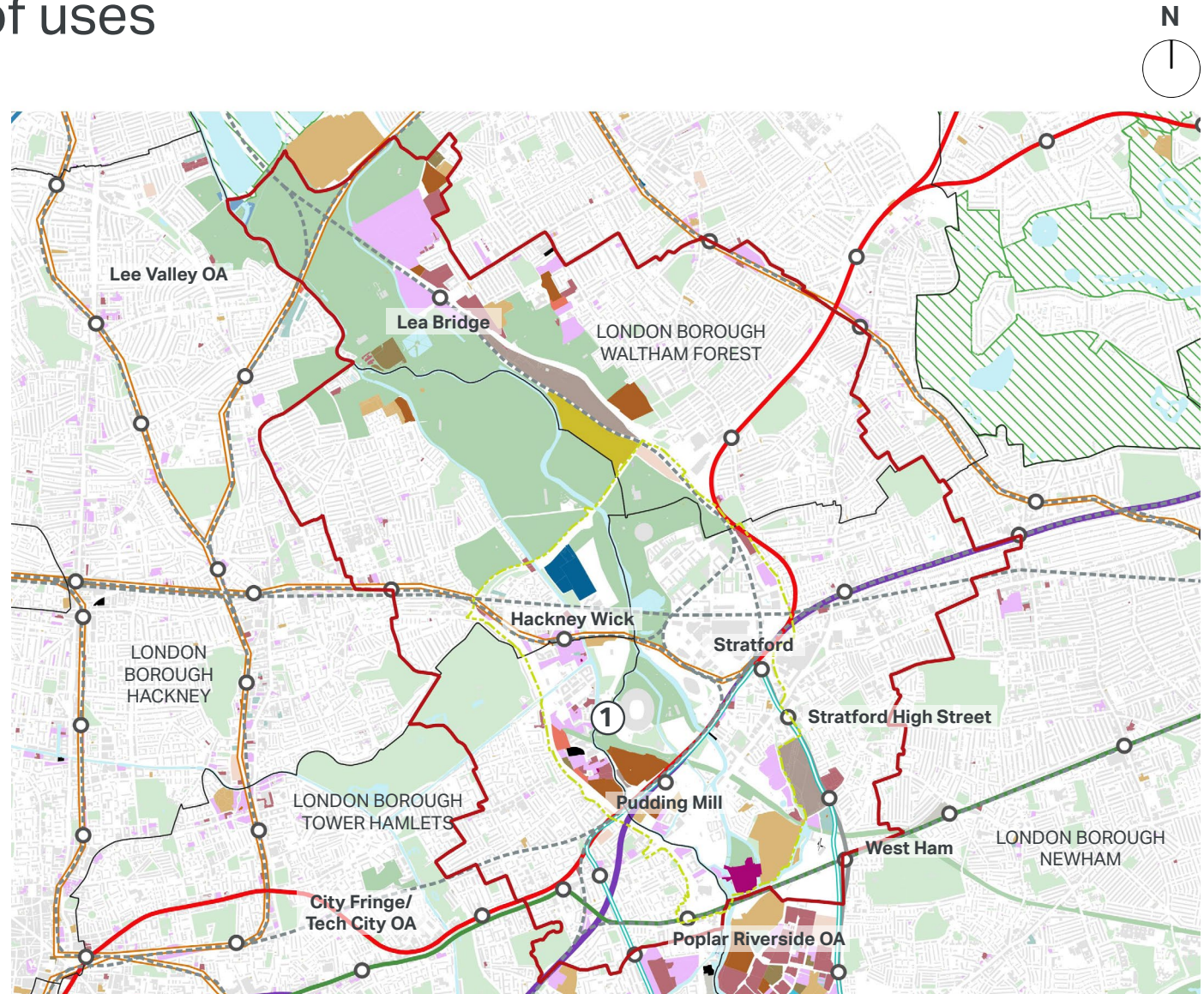
- Recent planning application approved for Bows Goods Yard by Network Rail. An industrial-led masterplan focusing on rail freight, that is estimated to provide 5,000 new jobs.



Bows Goods Yard by Network Rail

### KEY

- General Industry
- Community Kitchen
- Dark Kitchen
- Docks
- Films and studios
- Land for buses
- Land for rail
- Land with vacant buildings
- Light Industry
- Mixed use (including industrial)
- Open storage
- Self storage
- Other industrial
- Utilities
- Vacant industrial land
- Warehouse
- Waste management and recycling
- Wholesale markets



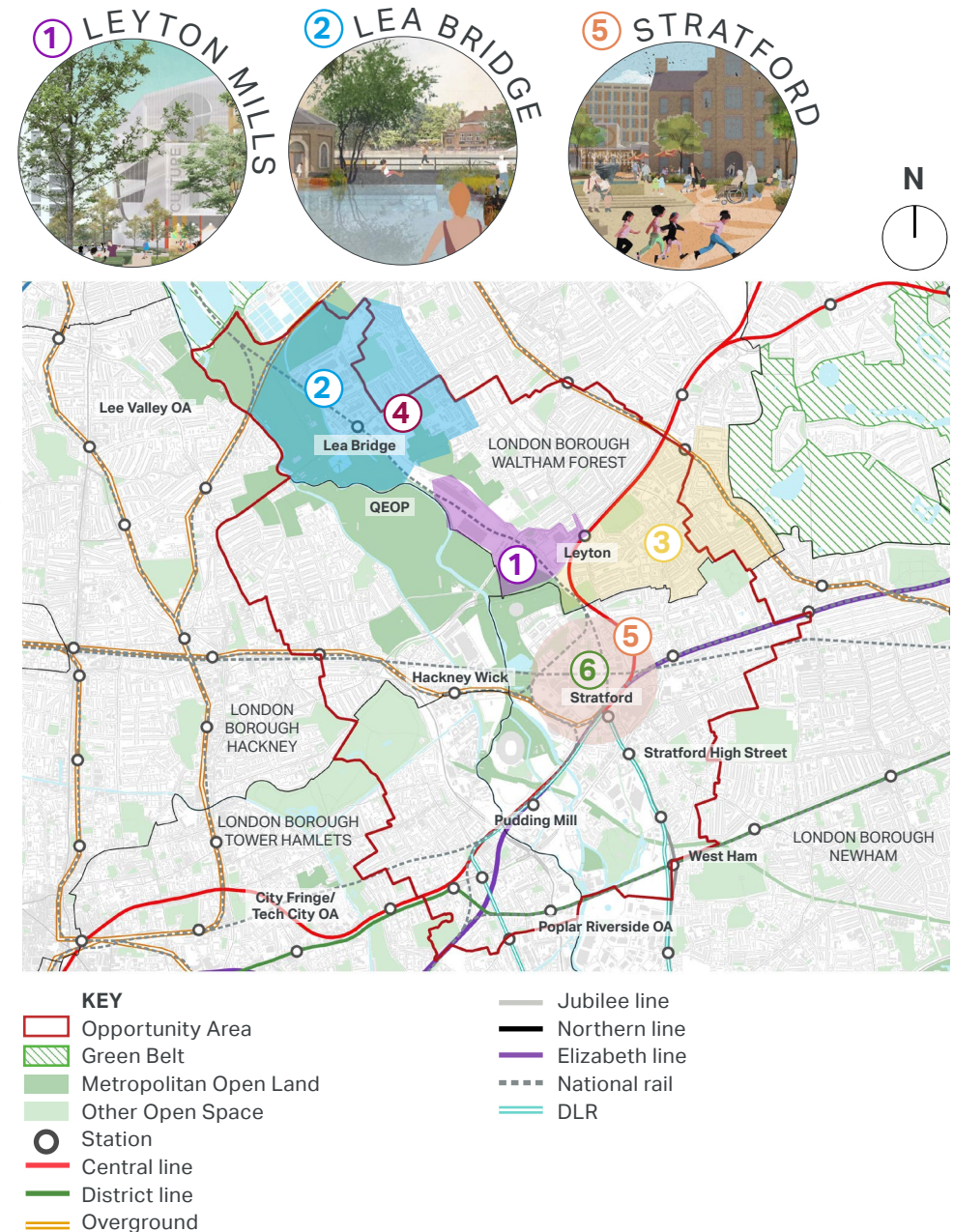
Source: [London Industrial Supply Study 2023](#)



# Olympic Legacy

## Place strategies: Overview

- There are a number of planning and regeneration documents that have been developed for different parts of the OA. These include the following:
- LB Waltham Forest:
  - ① [Leyton Mills SPD](#) (2024): completed in partnership between LB Waltham Forest and London Legacy Development Corporation, and adopted as a planning policy in 2024.
  - ② [Lea Bridge Framework](#) (2024): a spatial strategy to coordinate development in the area over time and guide priorities in terms of investment, infrastructure, community, green space and public space improvements.
  - ③ [South Leytonstone Framework](#) (2024): a spatial strategy to help create a fairer and more equal neighbourhood and better realise local benefits of new development and investment.
  - ④ Industrial Masterplan for Lea Bridge Gateway SIL (in progress): LB Waltham Forest working with the GLA on a Stage 1 masterplan.
- LB Newham:
  - ⑤ [Stratford Vision and Strategy](#) (2023): a regeneration - led vision and strategy that focuses on Stratford Town Centre, identifying 50 potential projects, ten big ideas, and five geographical areas of focus. It was approved by Newham's cabinet, but it does not constitute planning policy.
  - ⑥ [Stratford Station Outline Business and Urban Design Framework](#) (2023): Developed by 5th Studio for London Legacy Development Corporation / Network Rail / London Borough of Newham / Transport for London.

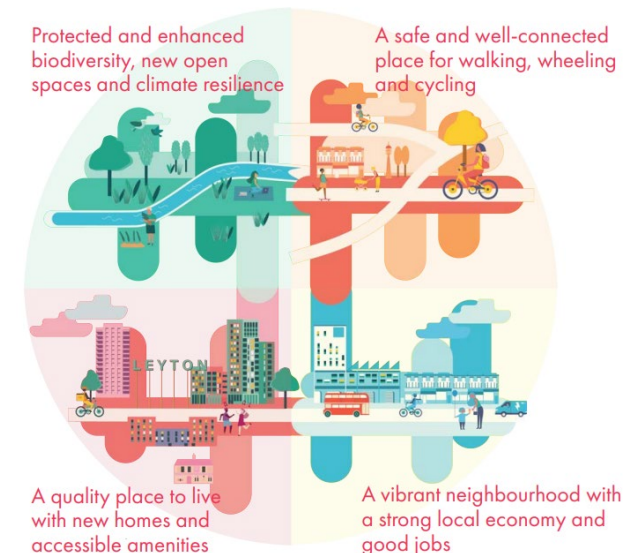




# Olympic Legacy

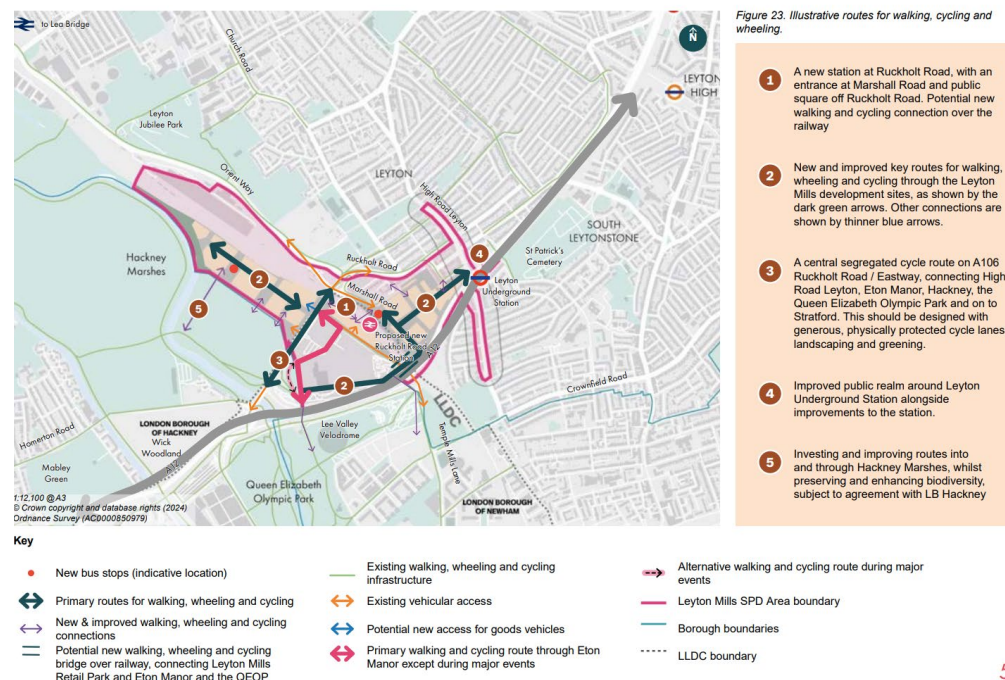
## Place strategies: Leyton Mills SPD (2024)

- This SPD sets out a vision and planning guidance for the delivery of the new Leyton Mills neighbourhood.
- The aim is to ensure that the three key development sites are developed in a joined up way to achieve enhanced and new green and blue spaces that reduce flood risk and respond to the Climate Emergency, improved transport, connectivity and air quality, new jobs and cultural destinations and bring forward high quality sustainable and affordable homes.



The vision. Source: [Leyton Mills SPD \(2024\)](#)

Contents Page Leyton Mills Supplementary Planning Document | July 2024



A safe and well - connected place. Source: [Leyton Mills SPD \(2024\)](#)



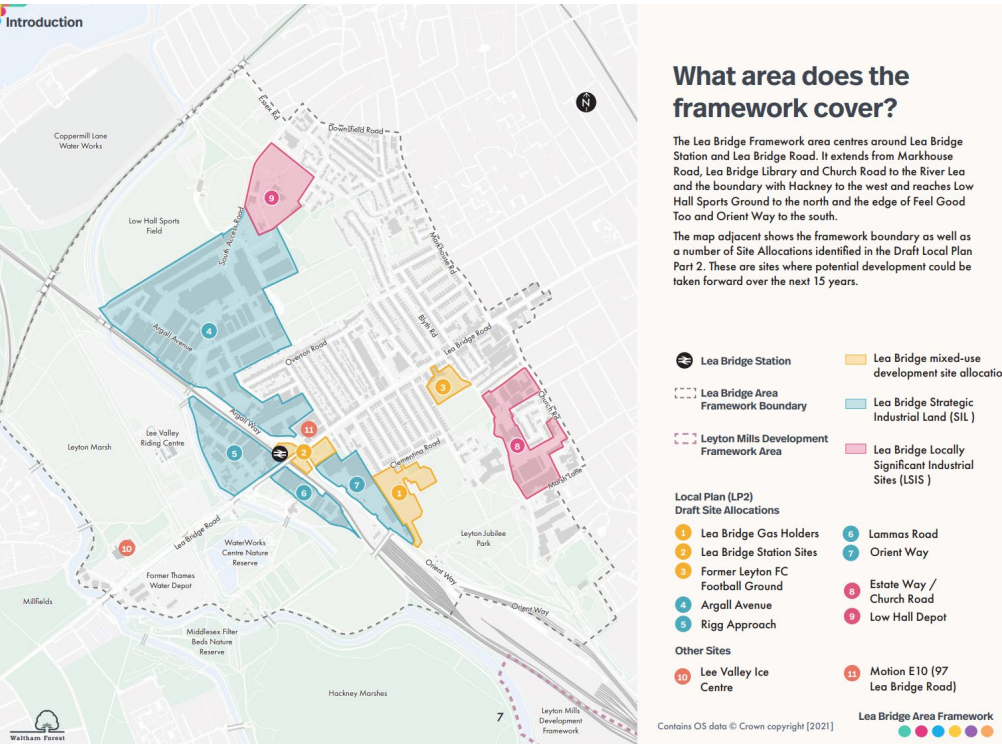
Visualisation of how the development of the Leyton Mills Retail Park site could look. Source: [Leyton Mills SPD \(2024\)](#)



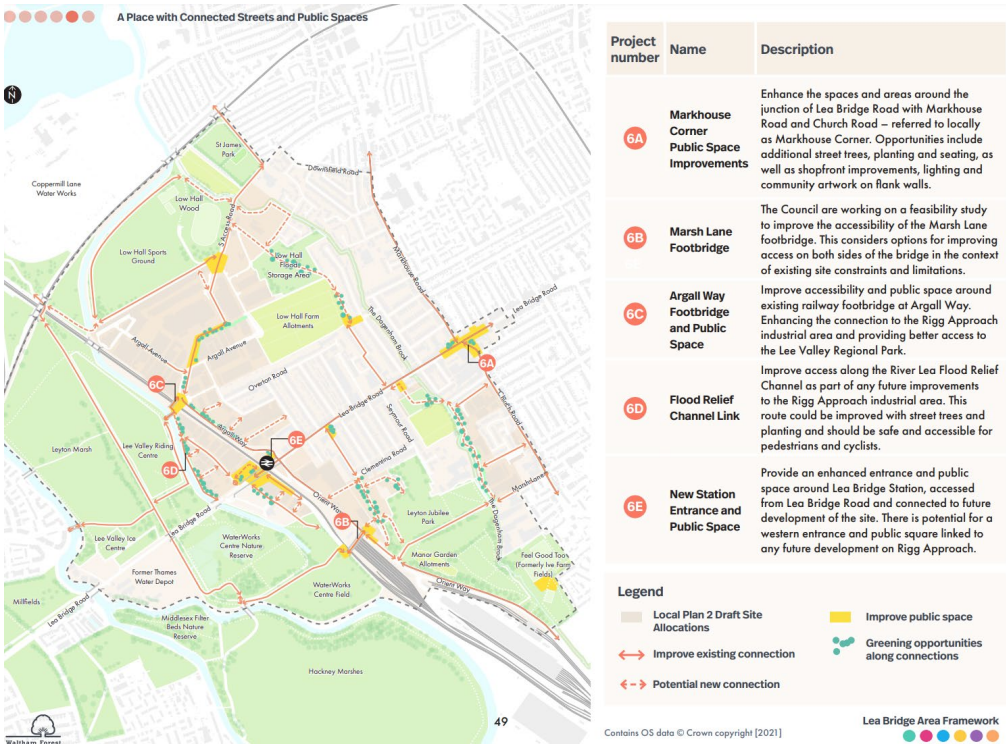
# Olympic Legacy

## Place strategies: Lea Bridge Area Framework (2024)

- Waltham Forest adopted a Framework to guide growth in the north part of the OA; in Lea Bridge. The guiding principles are as follows:
  - A Resilient Network of Linked Green Spaces and Waterways.
  - A Thriving Community With Great Facilities.
  - A Vibrant Industry and Local High Street.
- An Active and Playful Neighbourhood.
- A Place with Connected Streets and Public Spaces.
- GLA (London Plan Team) is working with LB Waltham Forest on a stage 1 industrial masterplan for Lea Bridge.



Source: [Lea Bridge Area Framework](#)



Source: [Lea Bridge Area Framework](#)

# Olympic Legacy

## Place strategies: South Leytonstone Area Framework (2024)

- The London Borough of Waltham Forest's Local Plan Part 1 identifies South Leytonstone as a Strategic Location, where a significant increase in housing, local jobs and community infrastructure is expected until 2035.
- The South Leytonstone Area Framework aims to help create a fairer and more equal neighbourhood and realise local benefits of potential development and investment.
- It is noted that this is a spatial strategy with a focus on delivery, and it does not constitute a planning policy document.
- The interventions identified are structured around key areas of the focus:
  - Activating High Road Leytonstone,
  - enhancing walking and cycling connectivity to transport links and nearby town centres, and
  - improving the surrounding public realm.
- These will be complimented by a series of other interventions such as public art, wayfinding, community and heritage related projects

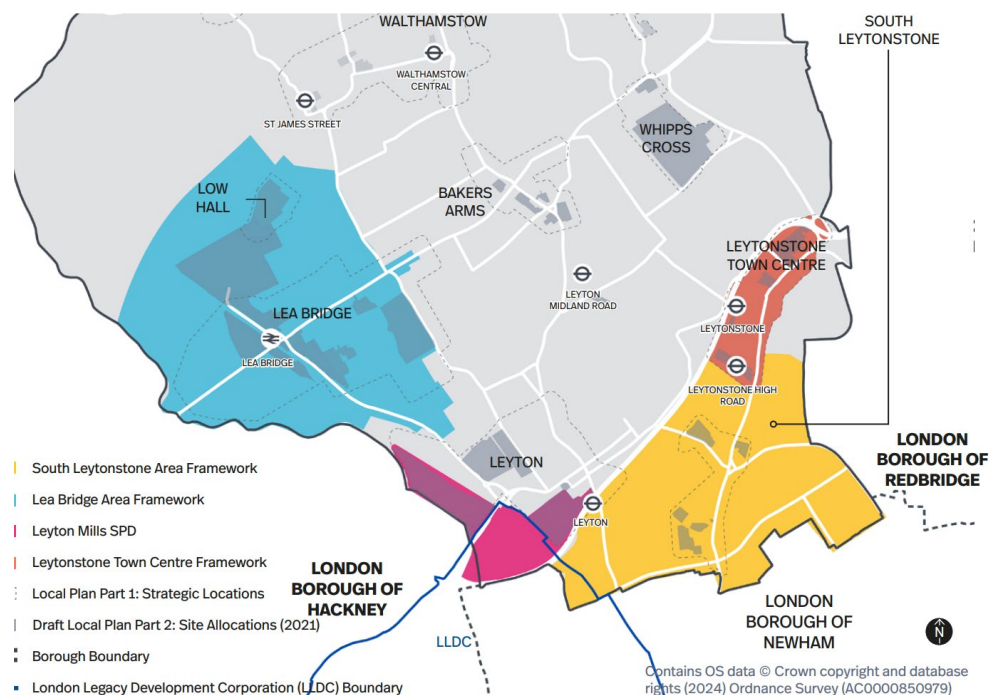


Diagram showing South Leytonstone Area Framework. Source: [South Leytonstone Framework \(2024\)](#)

### Delivery Plan

### Placemaking Strategy

The interventions identified in this documents are structured around key areas of the focus: Activating High Road Leytonstone, enhancing walking and cycling connectivity to transport links and nearby town centres, and improving the surrounding public realm. These will be complimented by a series of other interventions such as public art, wayfinding, community and heritage related projects.

#### 1. Activating High Road Leytonstone

#### 2. Enhancing walking and cycling

#### 3. Improving the public realm



Placemaking Strategy diagram. Source: [South Leytonstone Framework \(2024\)](#)



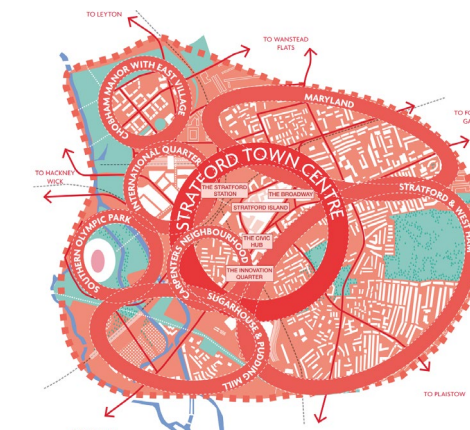
# Olympic Legacy

## Place strategies: One Stratford Vision

- Stratford is the heart of Newham as well as the heart of east London.
- In 2020, LB Newham acknowledging that the town centre does not work as well as it could, started engaging with stakeholders and local communities to put together a [future vision](#) for Stratford, which was approved by the cabinet in 2023.
- The vision + strategy on five distinct areas which make up the town centre:
  - Stratford Island – the area around the existing Stratford Shopping centre including the Cultural Cluster and Morgan House
  - The Broadway – the main route through Stratford town centre from Morrisons to Stratford High Street
  - The Civic Hub – the area around the Old Town Hall, including the Magistrates Court and Alice Billings House
  - The Innovation Quarter – The area around Burford Road and Stratford High Street DLR, including Stratford Workshops
  - The Stratford Station – The area around Stratford Station, including the bus station and links to Montfichet Road and Queen Elizabeth Olympic Park



Source:Hawkins\Brown © | December 2022



Source:Hawkins\Brown © | December 2022



Source:Hawkins\Brown © | December 2022

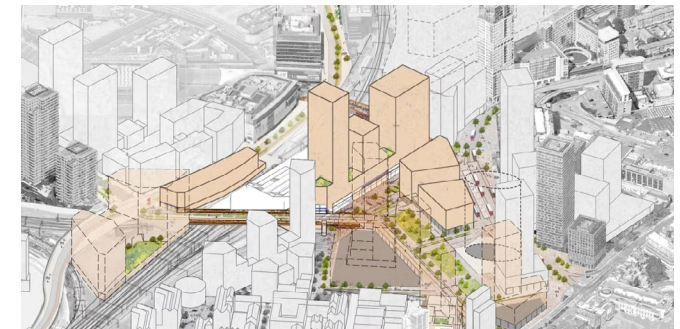
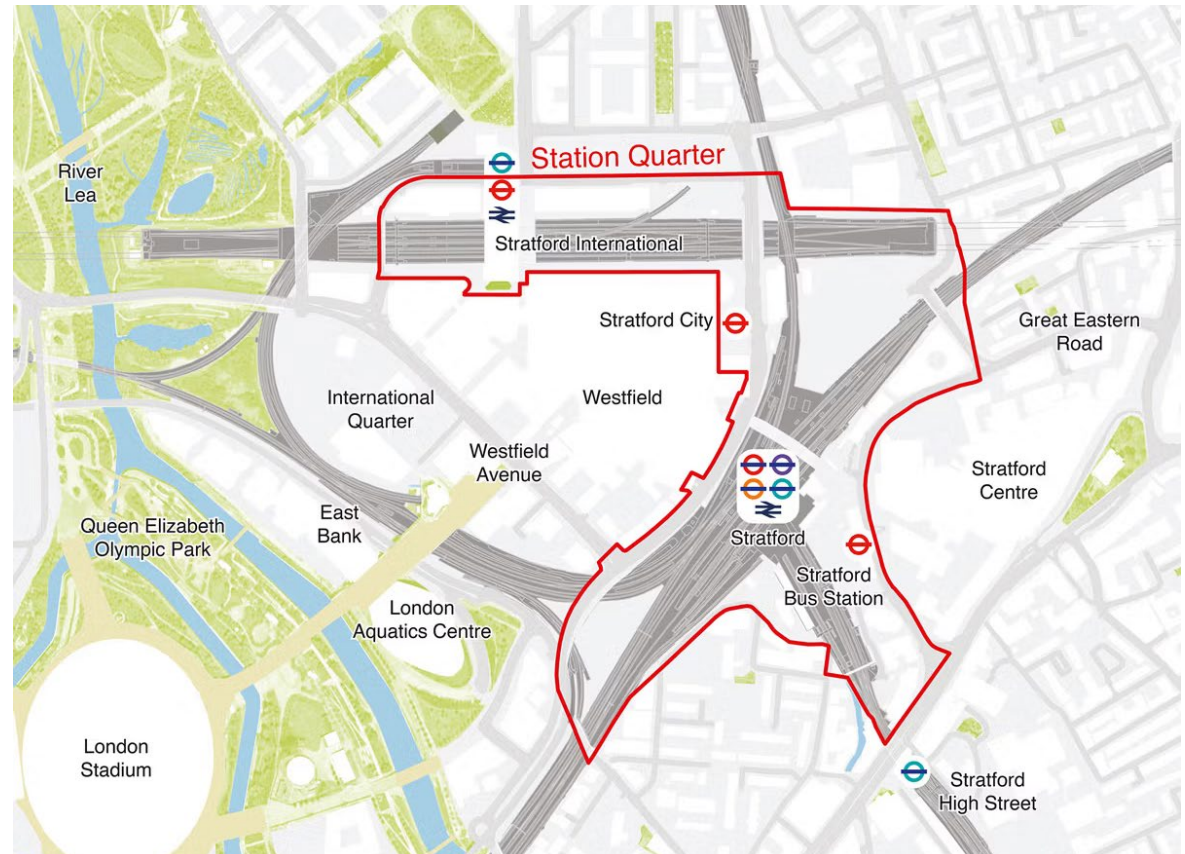


# Olympic Legacy

## Place strategies: Stratford station masterplan

### Business Case for Stratford Station

- Submitted to Government in August 2023.
- The submission, developed by Newham Council, Network Rail, TfL and the London Legacy Development Corporation, sets out the work needed to progress plans for an upgrade to Stratford Station.
- The [Strategic Outline Business Case](#) shows how an enhanced station can deliver:
  - Up to 10,000 new jobs
  - 150,000 sqm of commercial space
  - New retail and community space centre around a major new public square
  - Up to 2,000 new homes (50% genuinely affordable)
  - Support the growth of east London, raise productivity and reduce carbon emissions.



Source: [5th Studio](#)

# Olympic Legacy

## Moving forward

### Delivery

- **Olympic Legacy OA has one of the highest pipelines across all London OA**, delivering more than 80 per cent of its indicative homes capacity. The OA is also delivering a high number of jobs across London, building on the role of Stratford and the QEOP innovation district and cultural district (i.e. East Bank).

### Opportunities

- Major transport infrastructure is in place (Elizabeth Line, Stratford station), but investment is needed to deliver **local connections and improve severance across places** in the OA, including links to the QEOP. This includes connectivity to the south (Pudding Mill), and the north part of the OA (i.e. Lea Bridge, Leyton).
- **Stratford Station and Town Centre** represents a significant opportunity for growth in the OA, including the transformation of grey spaces to green spaces, a re-imagined station, and new social, health and community infrastructure.
- **As the OA is maturing, growth and placemaking opportunities are identified in places beyond the QEOP and Stratford**, for example in Leyton Mills (see adopted SPD) and Lea Bridge (see draft industrial masterplan).

### Proposition

- OA to be retained as 'maturing'.
- For the OA to realise its full potential, local infrastructure improvements and connections are still need to be delivered, which next to the existing site allocations justifies the retention of the OA as 'maturing', despite its significant homes/ jobs delivery to date.
- Stratford station / Town Centre presents an opportunity for growth and placemaking.
- Opportunity to review the OA boundary (See following page), and potential for cross-borough collaboration following the dissolution of LLDC.



Source: [Vision for Stratford](#)



# Olympic Legacy

## Moving forward

### Barriers/ Challenges to development

- **The current cost of debt finance** is having a negative impact on the schemes. The changes to fire safety, net zero and building regulations in the last year are technically complex and likely to take more time and potentially more money, particularly for taller buildings.

### OA boundary

- As of 2024, **planning powers return from LLDC to the four boroughs**. LLDC will maintain its status as a Mayoral Development Corporation and a functional body of the GLA beyond 2025 but with reduced functions.
- As part of the transition, there is **potential to review the boundary to better reflect the place identity of the Olympic Legacy OA**, and that of neighbouring ones, like the Lee Valley. For example:

- ① **Lea Bridge Strategic Area might be better placed within the Lee Valley OA**, as it feels better connected to that area, especially given the role of Lea Bridge Station within the Valley as well as the quantum of existing and planned industrial floorspace.
- ② **Potential for the OA boundary to align with the Leytonstone Strategic Location** (circa 1,580 new homes), as set out within Local Plan Part 1. This would cover the entire Leytonstone District Centre and incorporates some significant potential development sites.



### Olympic Legacy OA in development plans

- Newham Local Plan review (Regulation 19): shows the Olympic Legacy boundary, and identifies site allocations within it.
- Tower Hamlets (Regulation 19): shows the Olympic Legacy boundary, and identifies site allocations within it.
- Hackney is now embarking on their local plan refresh. In the current plan there is the LLDC boundary and the Lee Valley.
- Waltham Forest (Part 1 adopted in 2024): does not show the Olympic Legacy boundary in the Key Diagram or Policies map. Opportunity for the borough to amend this.