

Opportunity Area Portrait

London Bridge, Borough & Bankside

London Bridge, Borough
& Bankside OA



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.

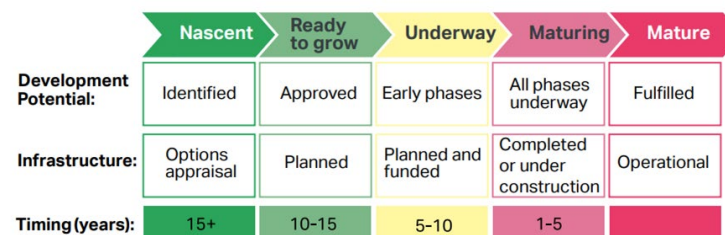
OA boundaries

- 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

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and
connectivity

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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.

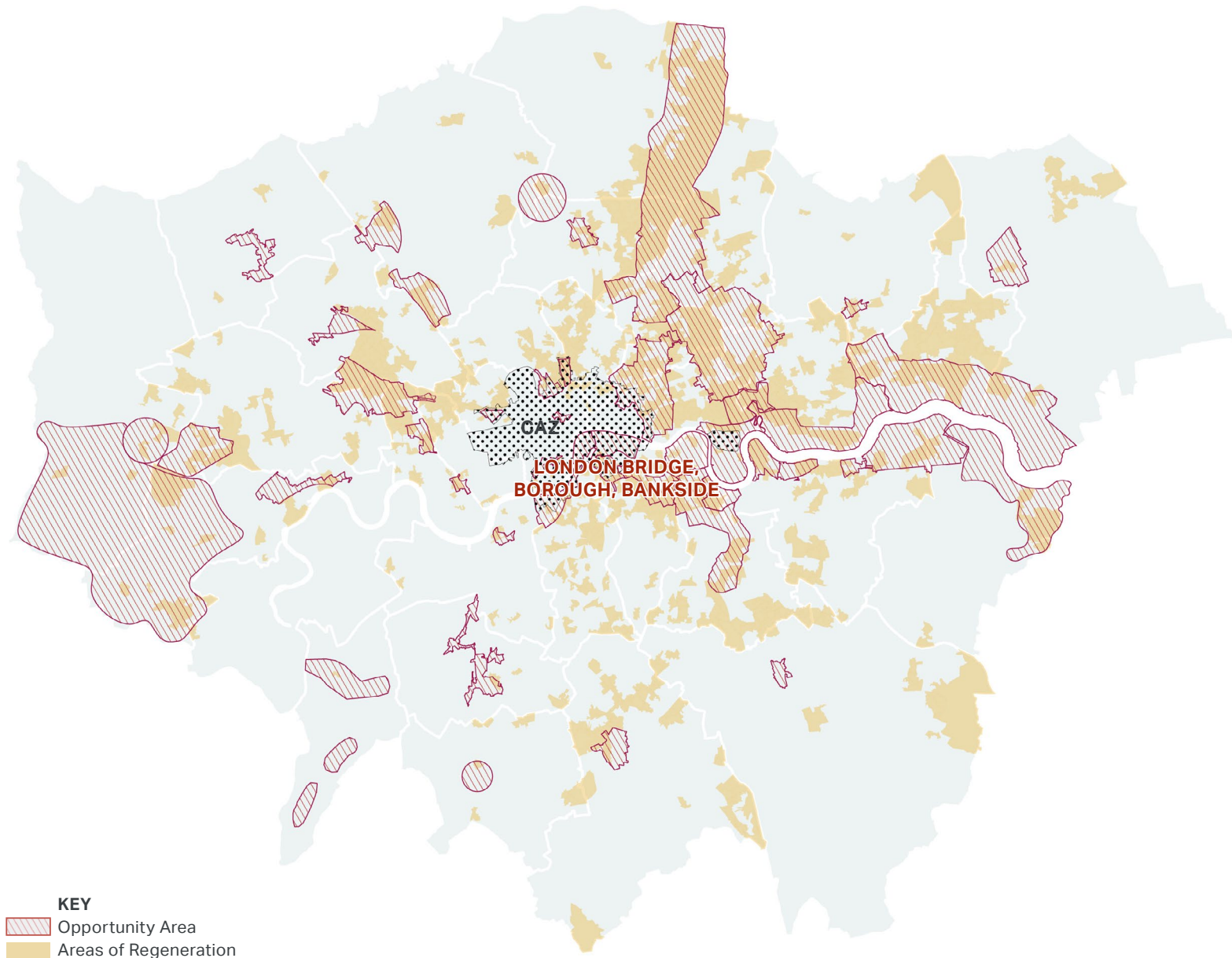
London Bridge, Borough & Bankside Context

OAs in the CAZ

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

Areas of Regeneration

London Bridge/ Bankside does not contain any within its boundary. Adjacent to some to the south.

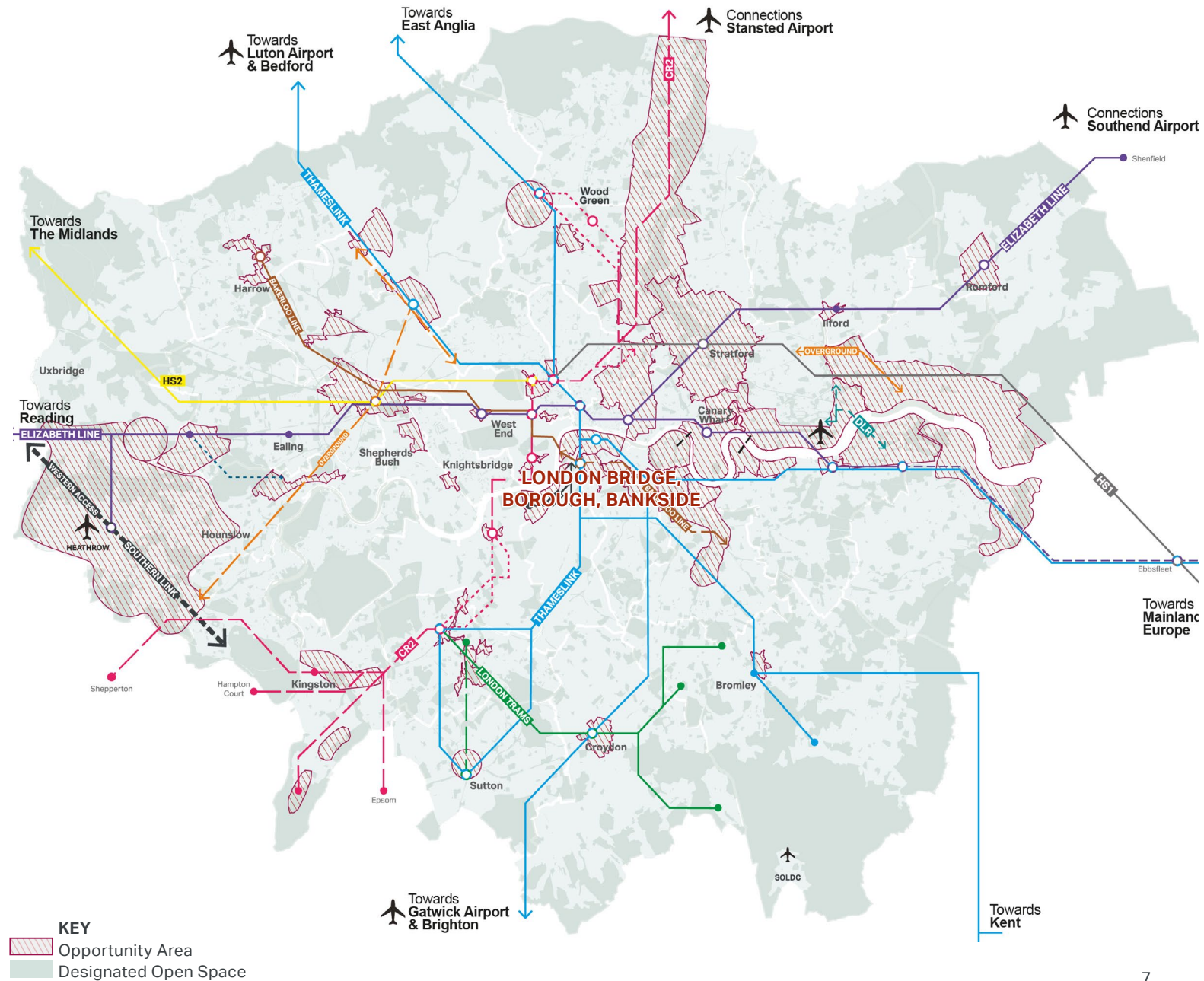


Source: Areas of Regeneration as per London Plan 2021

London Bridge, Borough & Bankside Context

Transport and Growth Corridors

- Very well connected OA
- Served by the underground
- Thameslink service currently connects the OA northwards towards Luton Airport, Bedford and East Anglia and southwards to Gatwick Airport, Brighton and Kent.



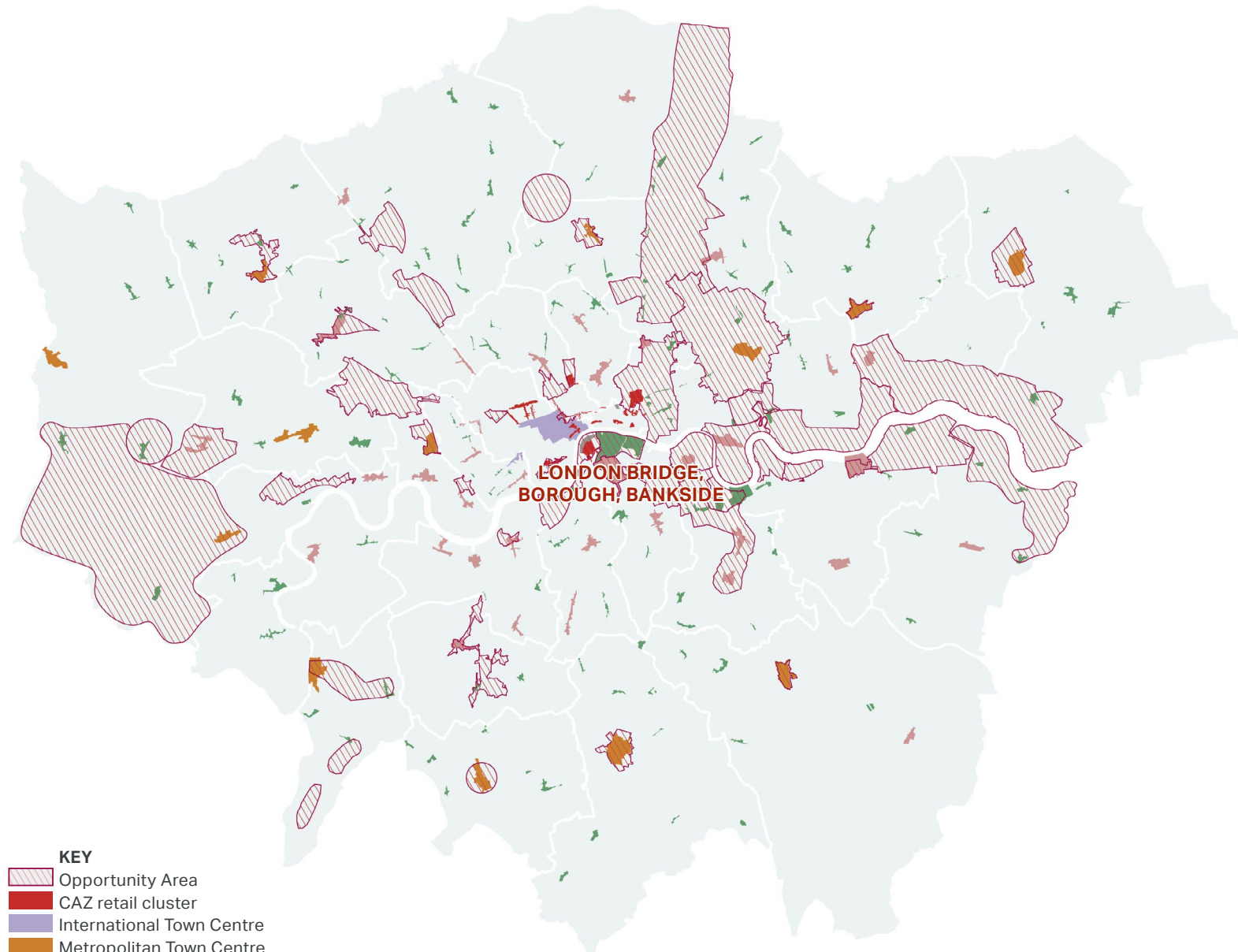
Source: Planning Data Map

London Bridge, Borough & Bankside 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 is a designated District Town Centre in the London Plan and Southwark Plan 2022.



Source: Planning Data Map

London Bridge, Borough & Bankside

Key info

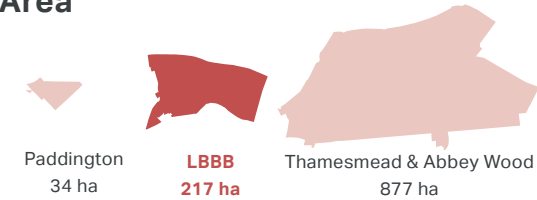
London Plan Designation Year



Borough

LB Southwark

Area



OA specific plans

N/A

Local Plan status

Adopted in 2022

Growth Corridor

Central London

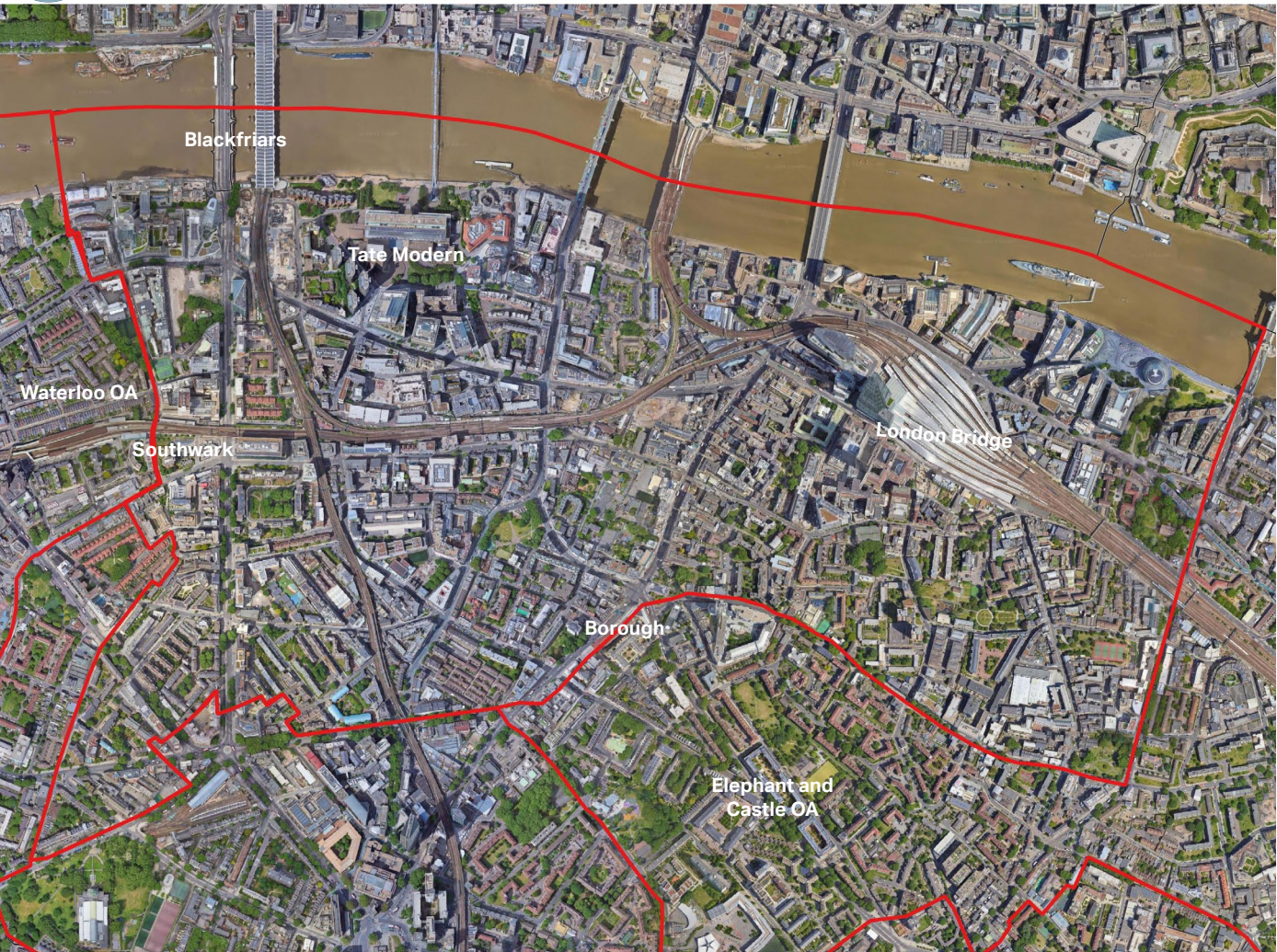
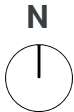
Housing Delivery Test 2023

Buffer

OA status (London Plan 2021)



London Plan 2021 capacities by 2041



Source: Google Earth

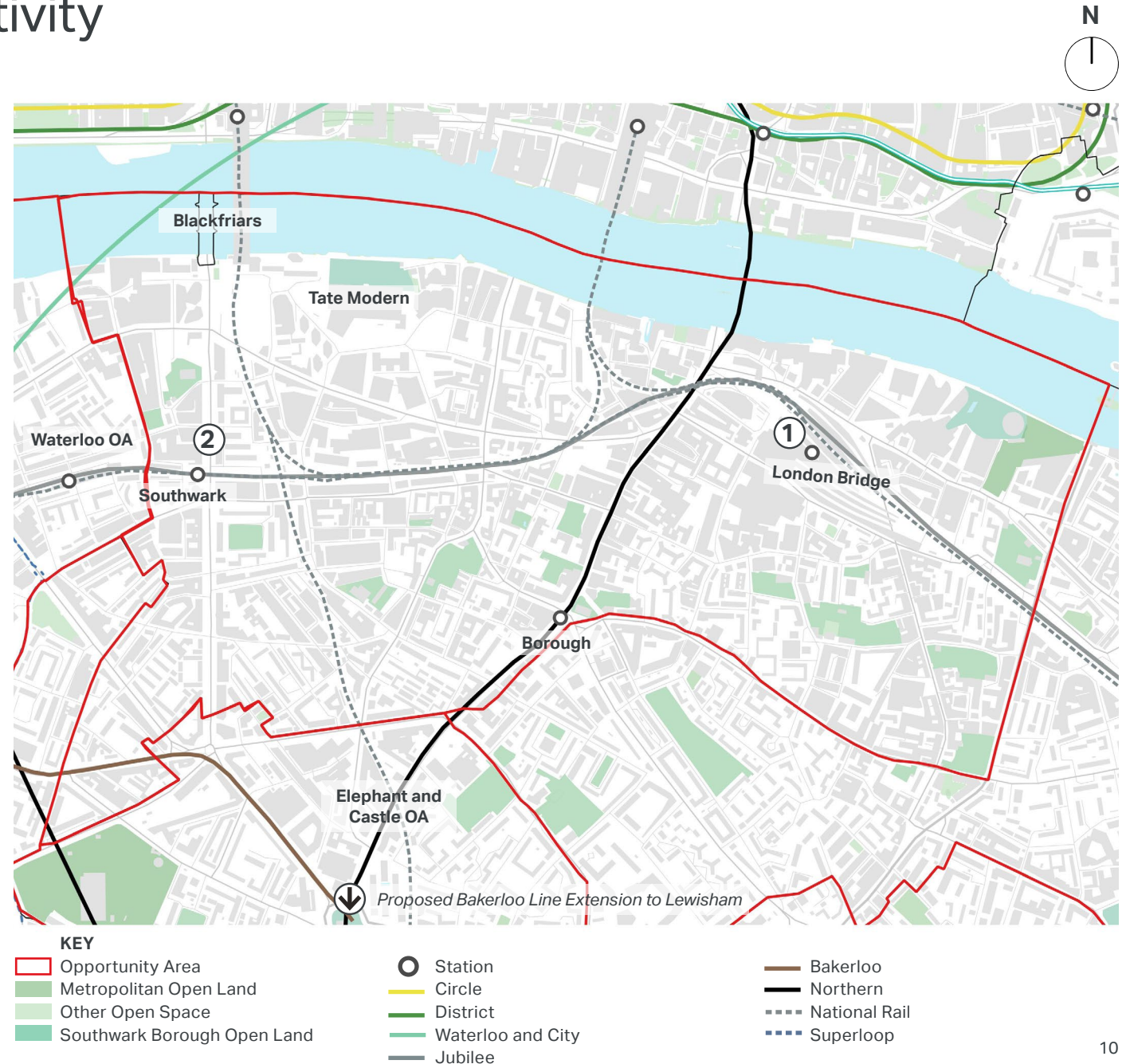
KEY
Opportunity Area

*Note that the LESD (2021) increased the capacity to 22,100 new jobs

London Bridge, Borough & Bankside

Transport and connectivity

- Part of the Central London Growth Corridor.
- Well-connected area, with TfL identifying it as an OA where transport it is not holding back development.
- New London Bridge station opened in 2019 - catalyst for development.
- Examples of Over Station Development (OSD) in Southwark to be completed in 2025.
- Connection of OA to other OAs in the south with the proposed Bakerloo Line Extension from E&C to Lewisham.

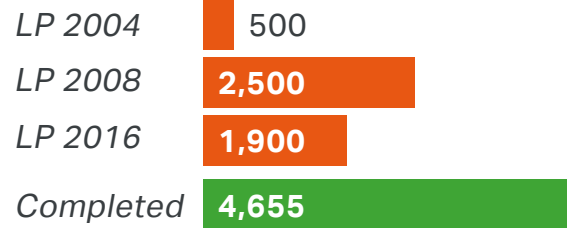


London Bridge, Borough & Bankside

Delivery of homes

Delivery pre-2019

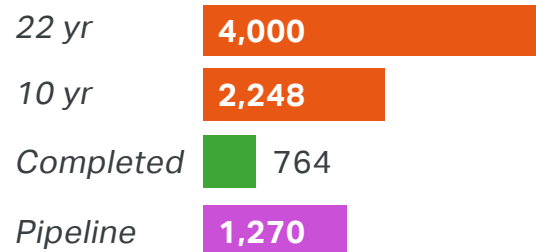
Completions against capacity



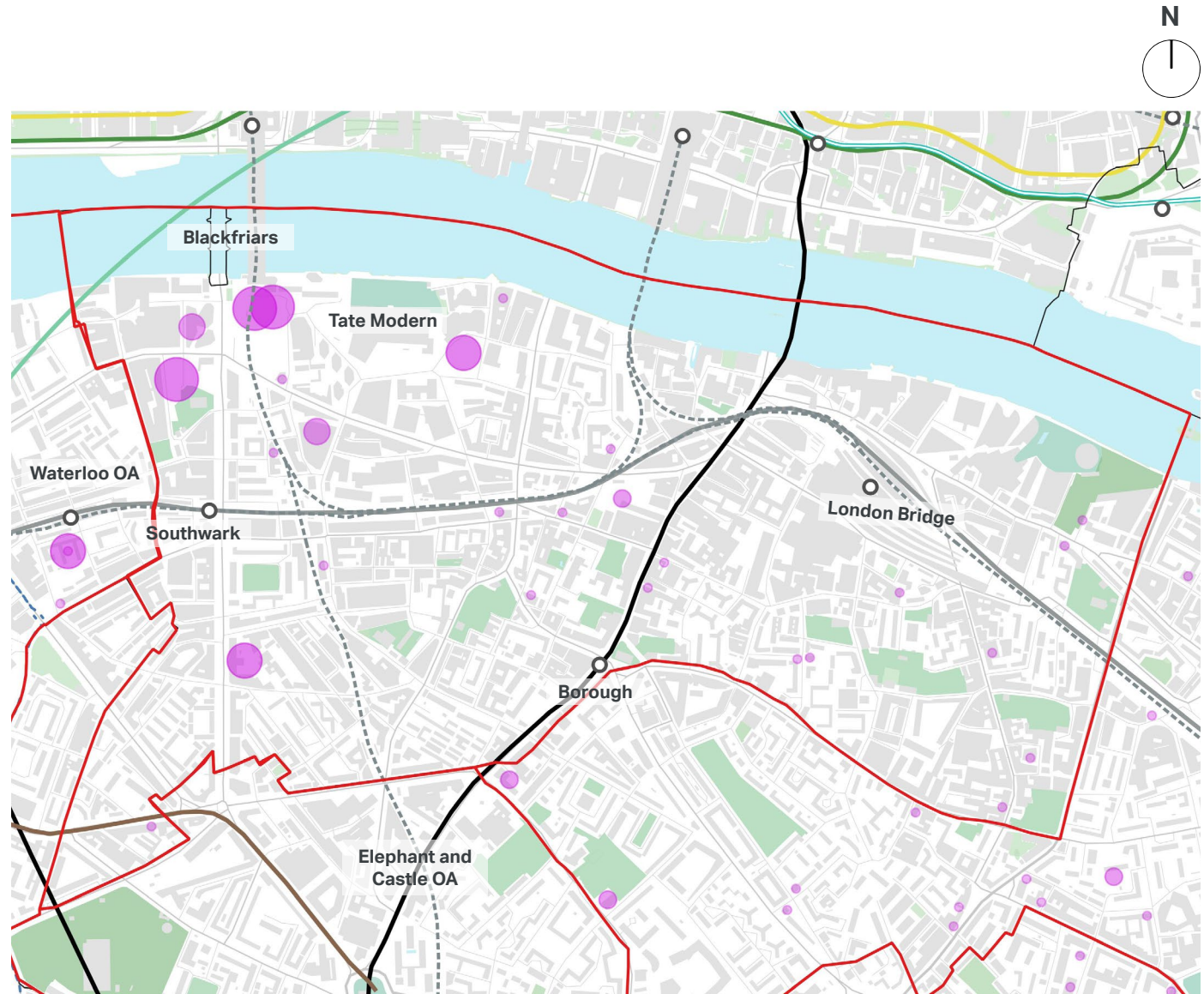
The OA exceeded its original capacity at designation, delivering more than 310 homes per year.

Delivery post - 2019 (London Plan 2021)

Progress against 22yr, 10 yr capacity



OA already delivered 40 per cent 10 year indicative homes figure, and the completions and the existing pipeline account for 70 per cent of its 22 year capacity.



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

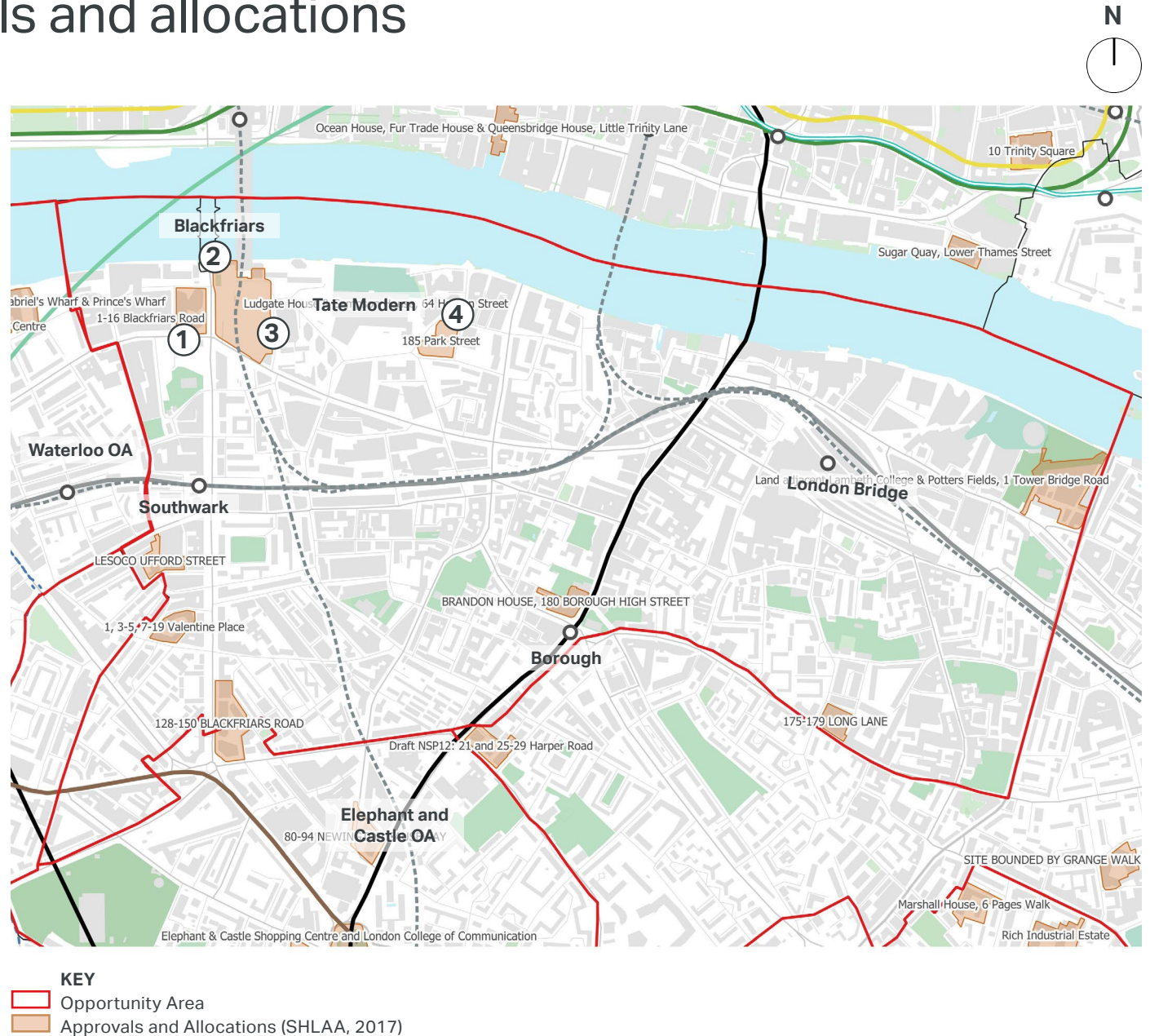
*[Completions](#) account for all types of supply between 2019/2020 to 2023/2024.

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

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SHLAA 2017: Approvals and allocations

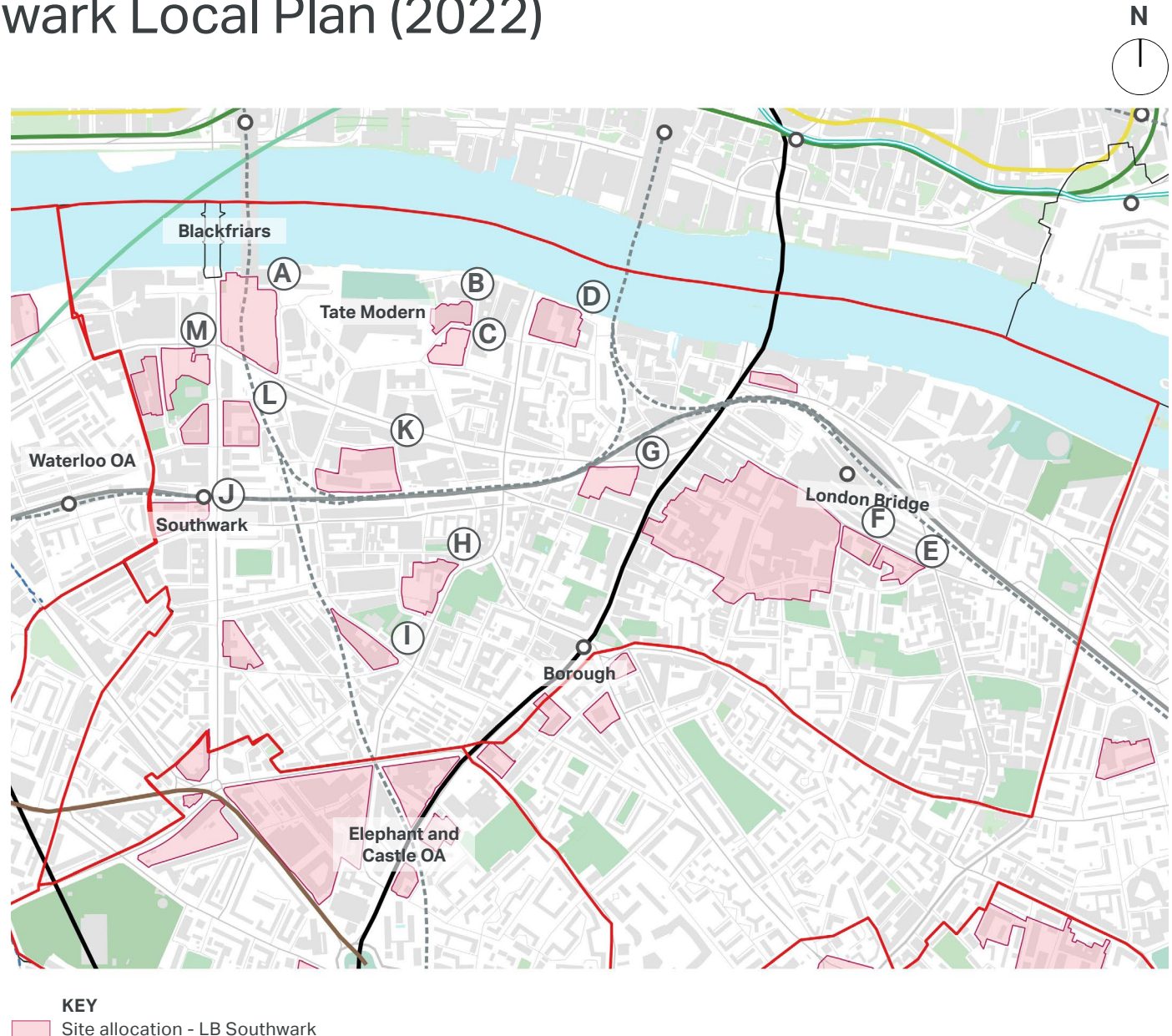
- Approvals seems to exceed the SHLAA 2017 across the OA. Some major approvals include:
- ① Completed in 2019.
 - ② Ludgate House approved.
 - ③ Sampson House approved variations in 2022. 341 homes, 8,054sqm (GIA) of office space (Class B1); 1,436sqm (GIA) of retail floorspace (Class A1-A4); 904sqm (GIA) of cultural floorspace (Class D1/D2); 16,254sqm (GIA) hotel with up to 126 rooms (Class C1).
 - ④ Completed in 2021. 169 homes and office space.



London Bridge, Borough & Bankside

Site Allocations: Southwark Local Plan (2022)

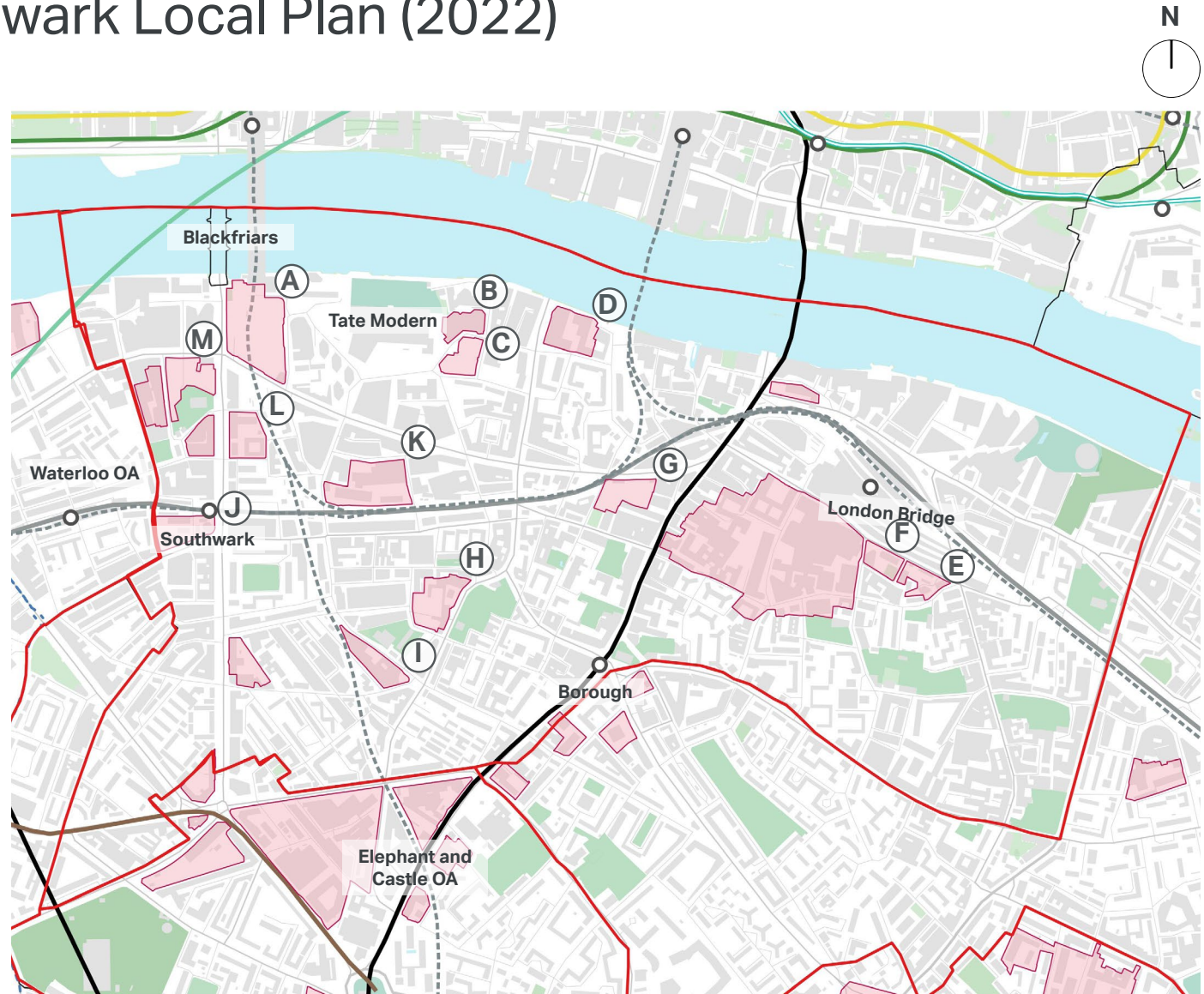
- Ⓐ **NSP 19:** 598 homes indicative capacity. Several approved applications, 492 homes delivered, 581 homes under construction, 258 homes approved.
- Ⓑ **NSP 03:** 80 homes indicative capacity.
- Ⓒ **NSP 04:** 169 approved - indicative capacity met.
- Ⓓ **NSP 06:** 261 homes indicative capacity. No housing capacity to be delivered on site.
- Ⓔ **NSP 54:** 121 homes indicative capacity. No housing capacity to be delivered on site.
- Ⓕ **NSP 53:** 362 homes indicative capacity. No C3 delivered, student accommodation provided.
- Ⓖ **NSP 07:** 36 homes under construction - indicative capacity met.
- Ⓗ **NSP 05:** 199 homes indicative capacity. 196 delivered



London Bridge, Borough & Bankside

Site Allocations: Southwark Local Plan (2022)

- ① **NSP 08:** 66 homes indicative capacity.
- ② **NSP 20:** 25 homes under construction - indicative capacity met.
- ③ **NSP 02:** 44 homes indicative capacity.
- ④ **NSP 16:** 124 homes indicative capacity. 66 under construction.
- ⑤ **NSP 22:** 288 homes indicative capacity. 433 approved.



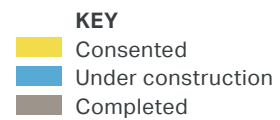
KEY
 Site allocation - LB Southwark

London Bridge, Borough & Bankside

Development activity 2021



Source: vu.city



London Bridge, Borough & Bankside Development activity 2024

- Transformation of the OA continues around key stations.
- Most of the sites consented and under construction.



Source: vu.city

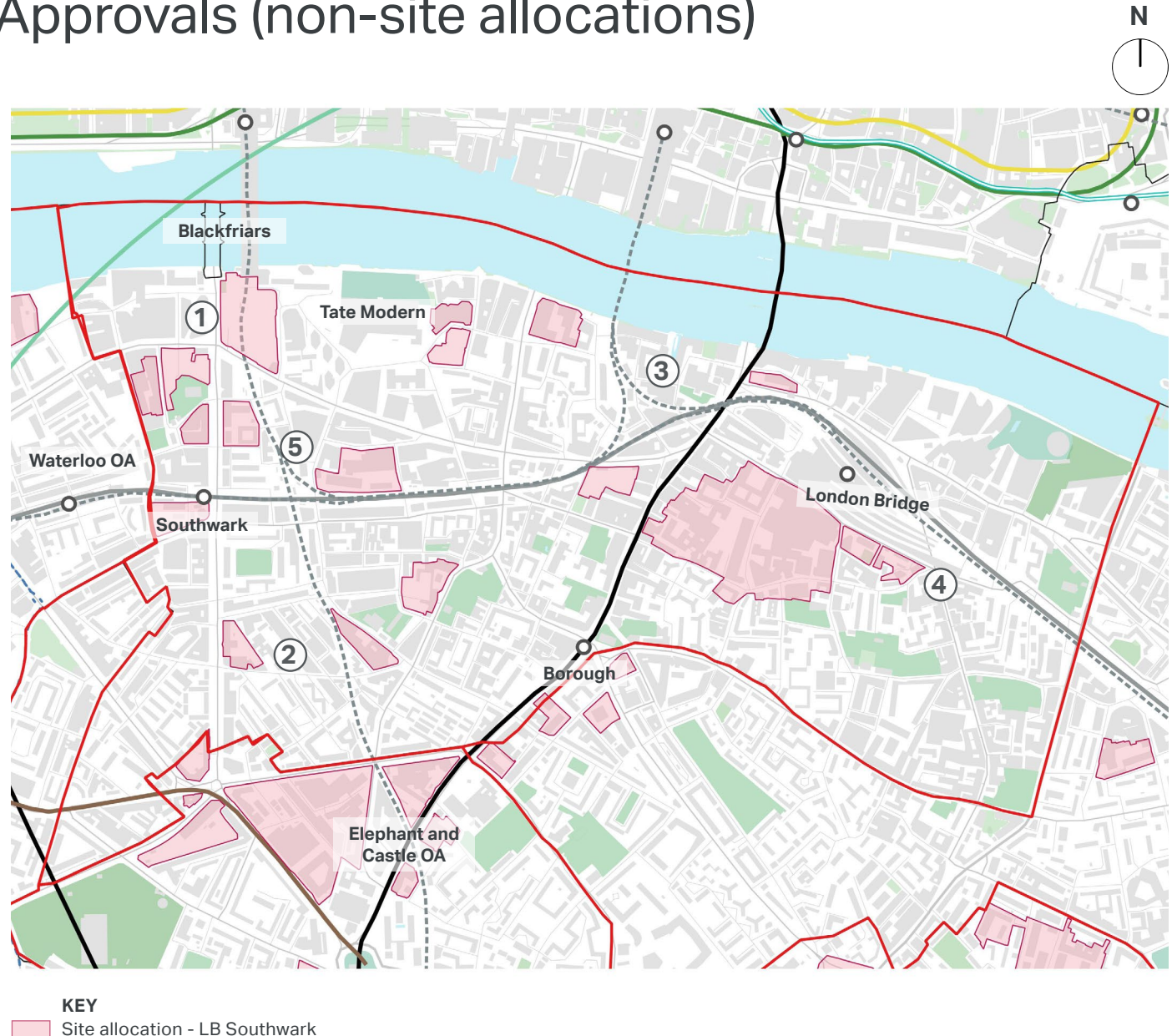
KEY	
■	Consented
■	Under construction
■	Completed

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Development activity: Approvals (non-site allocations)

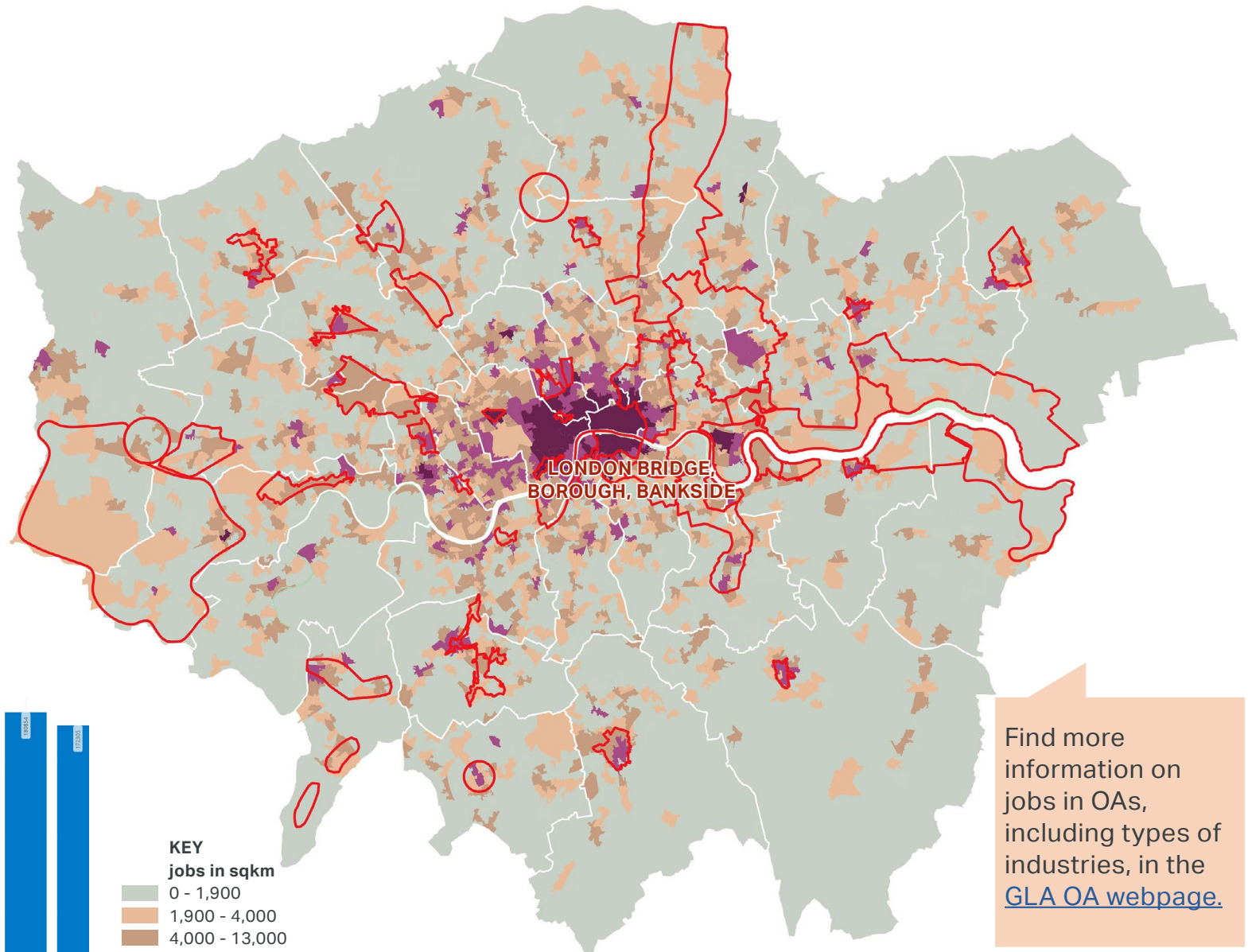


- ① **1-16 Blackfriars Road / One Blackfriars:** 274 homes completed in 2019.
- ② **14-21 Rushworth Street London SE1 ORB:** Office space completed.
- ③ **Minerva House:** Commercial space. Approved March 2023.
- ④ **40-44 Bermondsey Street Vinegar Yard Warehouse 9-17 Vinegar Yard And Land Adjacent To 1-7 Snowfields:** Commercial office and retail space. Approved August 2024.
- ⑤ **33-36 Bear Lane London Southwark SE1 0UH:** Commercial office and retail space. Approved September 2024.

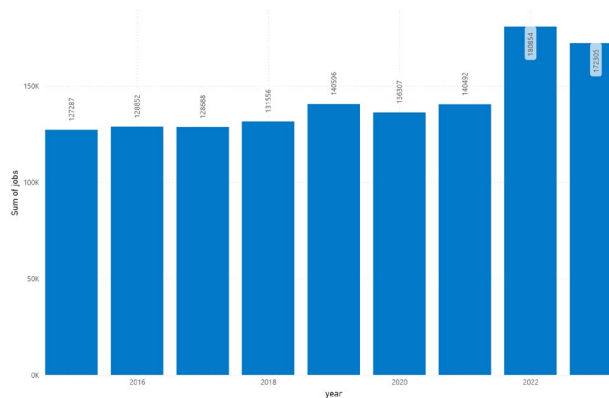


London Bridge, Borough & Bankside Jobs

- The OA presents a high jobs density (proximity to CAZ, office cluster).
- In 2022, there were more than 180,800 jobs in the OA making it the OA with the second highest number of jobs across London after City Fringe/ Tech City.
- In 2023, the OA accounts for 63 per cent of jobs in Southwark.



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](#).

London Bridge, Borough & Bankside Town Centres and High Streets

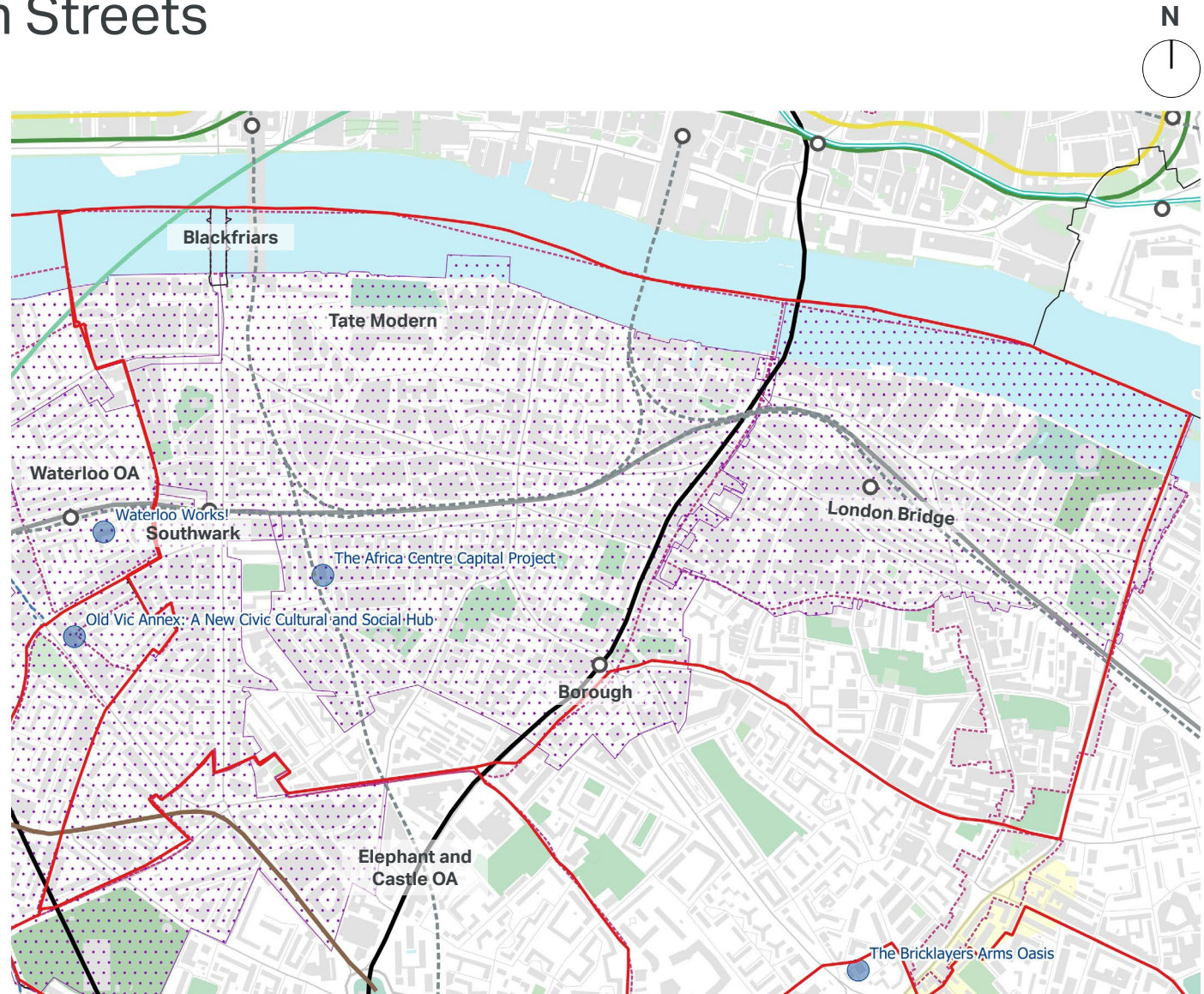
- The OA is in the CAZ with two district town centres (Bankside, London Bridge)
- Two Business Improvement Districts (Better Bankside, Team London Bridge): a number of temporary and permanent interventions to support the change in the OA.



The Africa Centre



Better Bankside installation



KEY

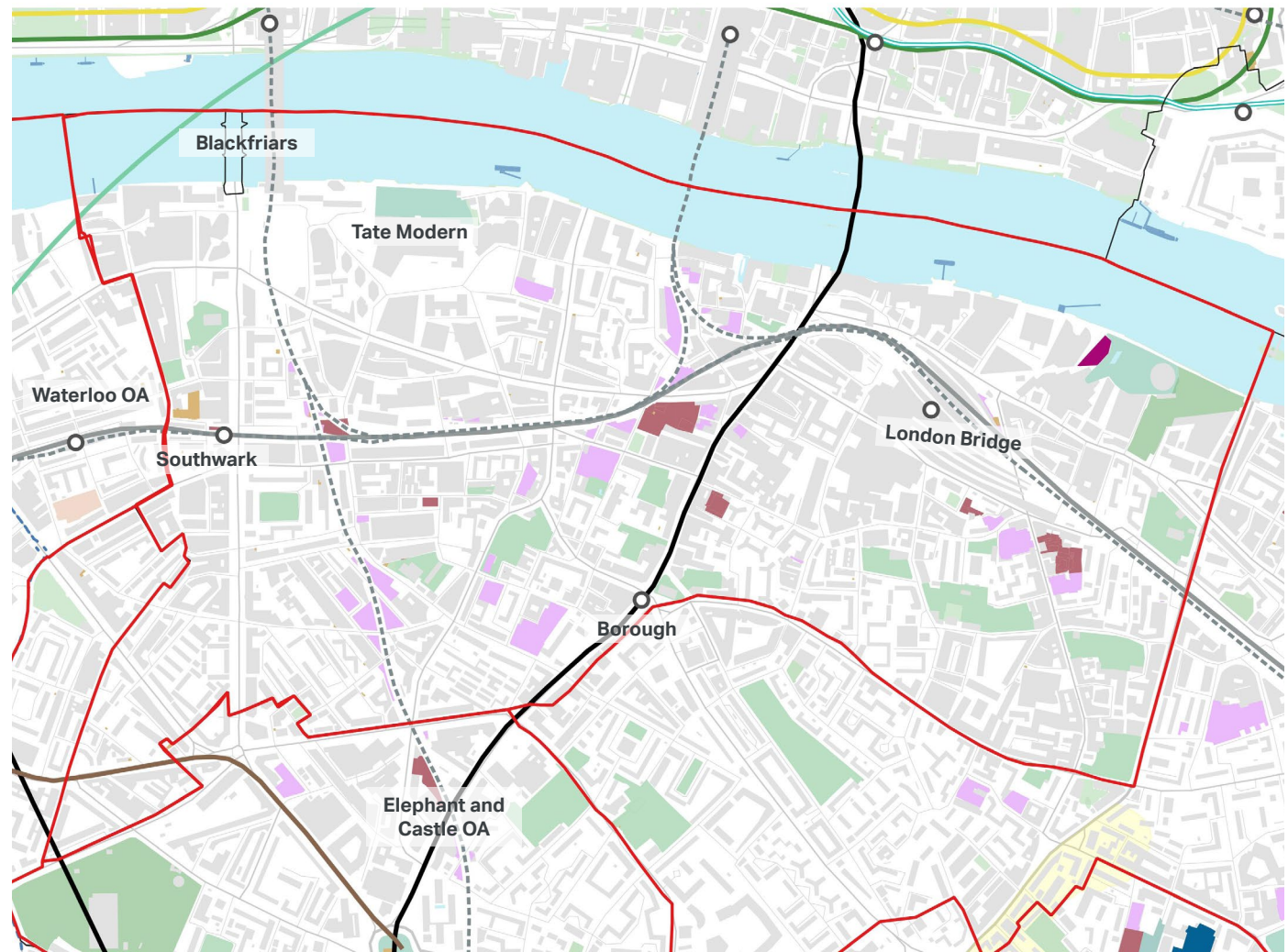
- Town Centre
- High street
- Business Improvement District

- Good Growth Funded project (Round 1 to 3)

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Industrial land: Types of industry

- Non - designated industrial land (historic character of parts of the OA).
- Typologies: General manufacturing, and warehouse.
- Role of arches, including logistics.

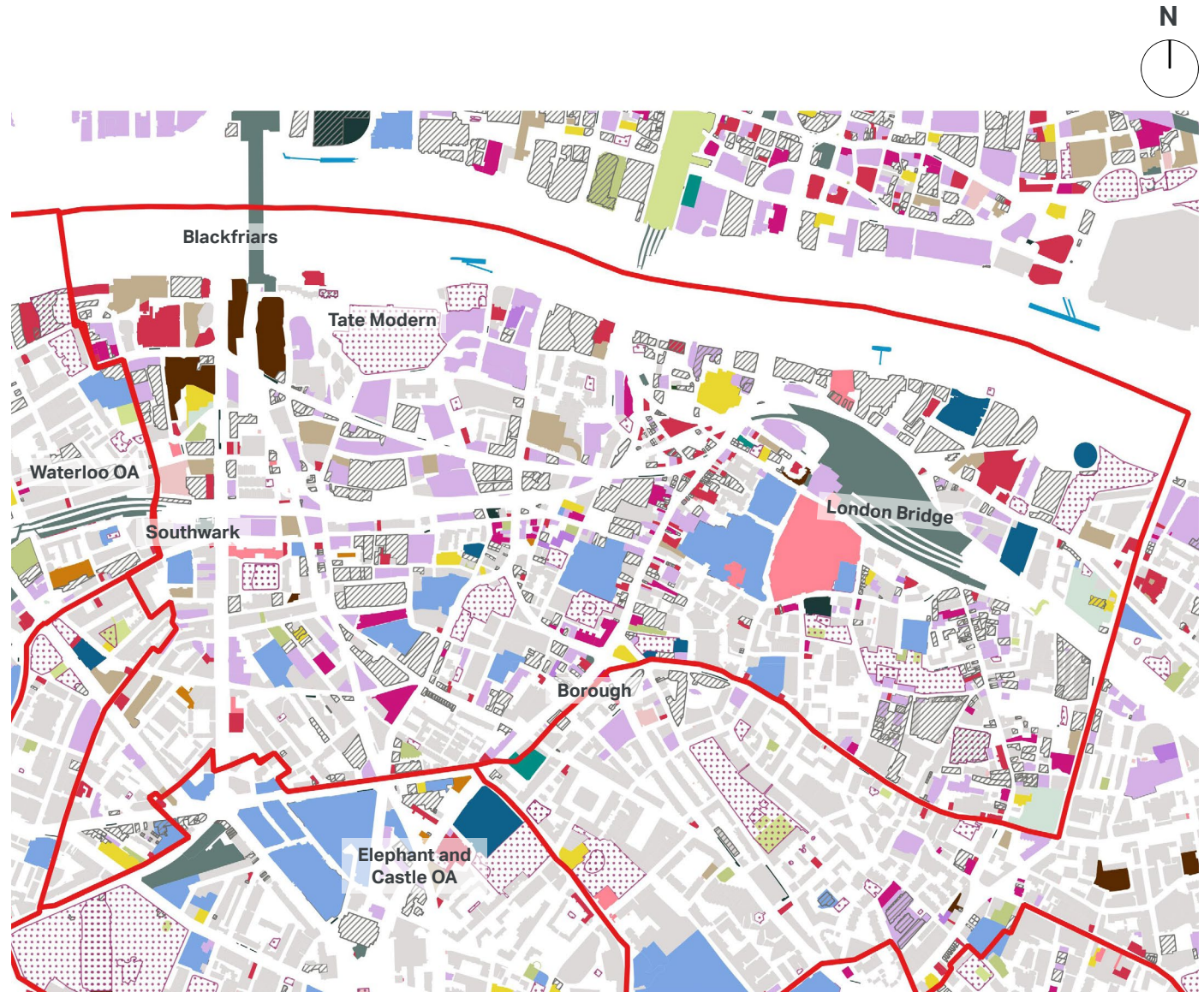
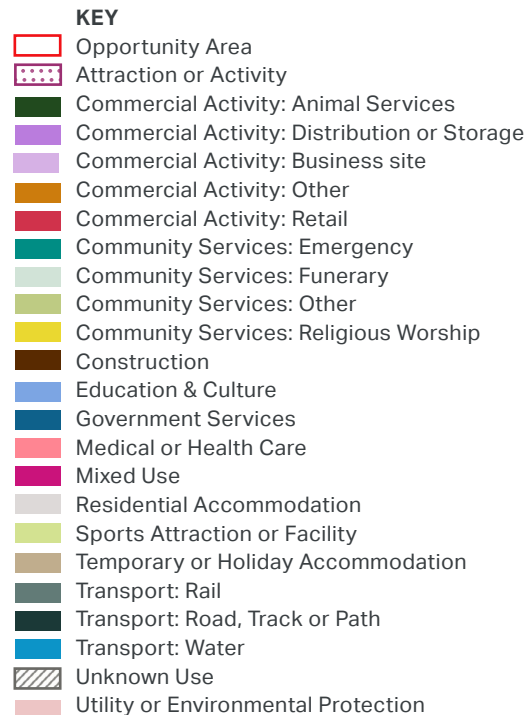


KEY	
■	Docks
■	General Industry
■	Land for buses
■	Mixed - use (industrial driven)
■	Self storage
■	Utilities
■	Vacant industrial land
■	Warehouse
■	Waste management and recycling

London Bridge, Borough & Bankside

Land uses

- Office and business cluster.
- Role of education and culture land uses in the OA.
- Destinations along riverfront.
- Construction sites and activity in Bankside.



Source: OSNGB, City Intelligence Unit (GLA)

London Bridge, Borough & Bankside

Moving forward

- **OA sits within the CAZ**, which is covered under London Plan SD4.
- Almost **70 per cent of the indicative homes capacity by 2041** has been met by completions since 2019, and existing pipeline.
- **Residential pipeline in the OA is relatively low** (around 2,175 homes still to be built, 26th 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.
- There seem to be **no available land for significant growth**. There are some sites in the pipeline and some smaller opportunities for new jobs and homes.
- The jobs created since 2019 indicate that the OA **already delivered its estimated capacity** (LESD estimates for 2041).
- Being well - connected and with anchor institutions in place, together with Waterloo, the OA is a key player in life sciences and innovation (**SC1 London Life Sciences Innovation District**).
- Acknowledge **challenging edges** and transition between OA and new communities.

Proposition

OA to be moved to 'Mature'.



Source: [Better Bankside](#)