

Opportunity Area Portrait

Paddington



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.

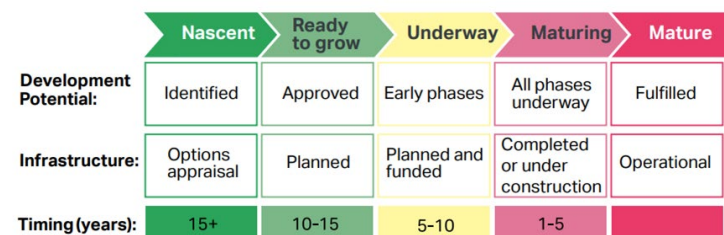
OA boundaries

- 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](#).

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strategies*

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forward

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

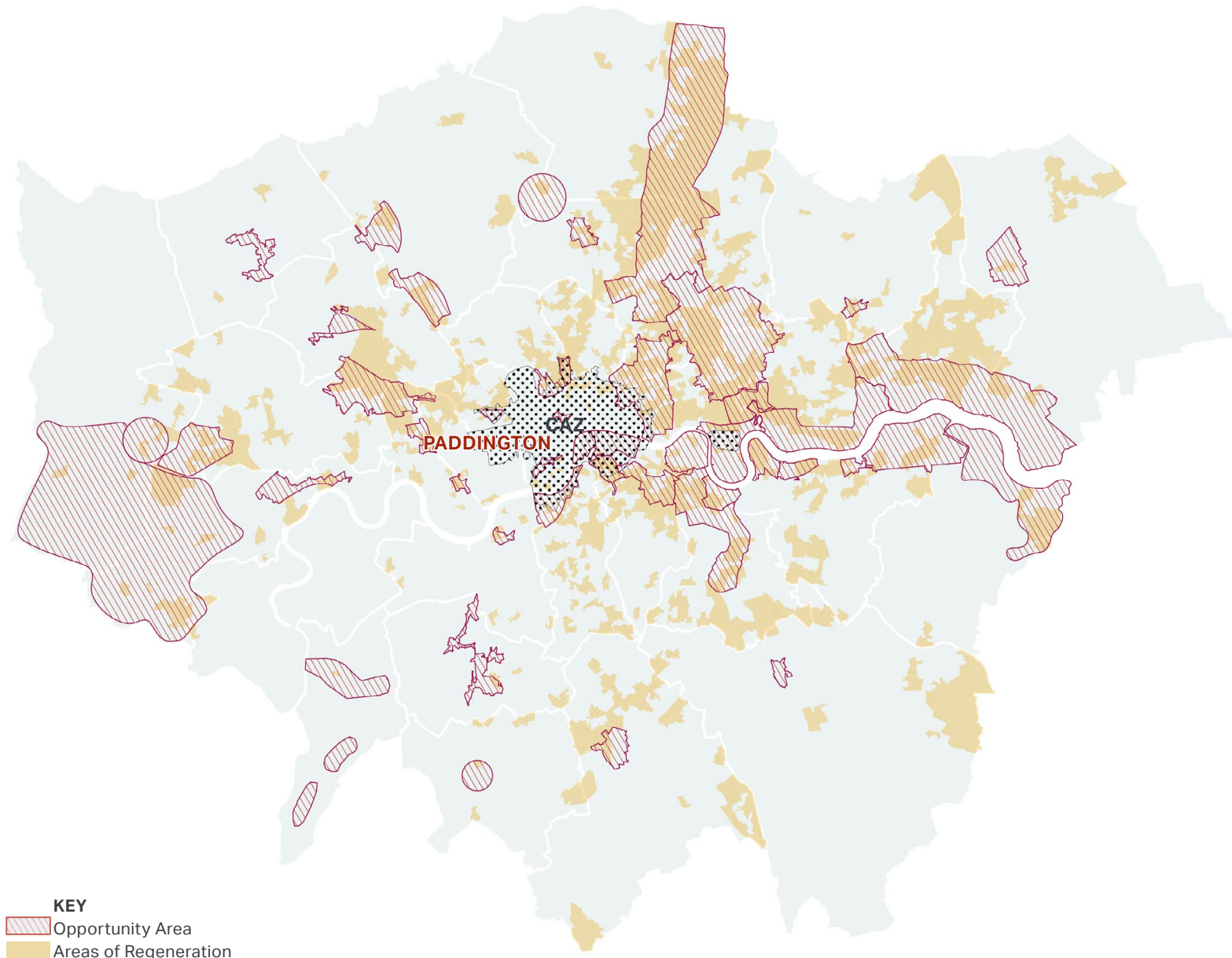
Paddington Context

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)
- Euston (Underway)
- Elephant & Castle (Underway)
- Part of City Fringe/ Tech City (Underway)
- Paddington (Underway)

Areas of Regeneration

OA 'wrapped' around areas of regeneration.

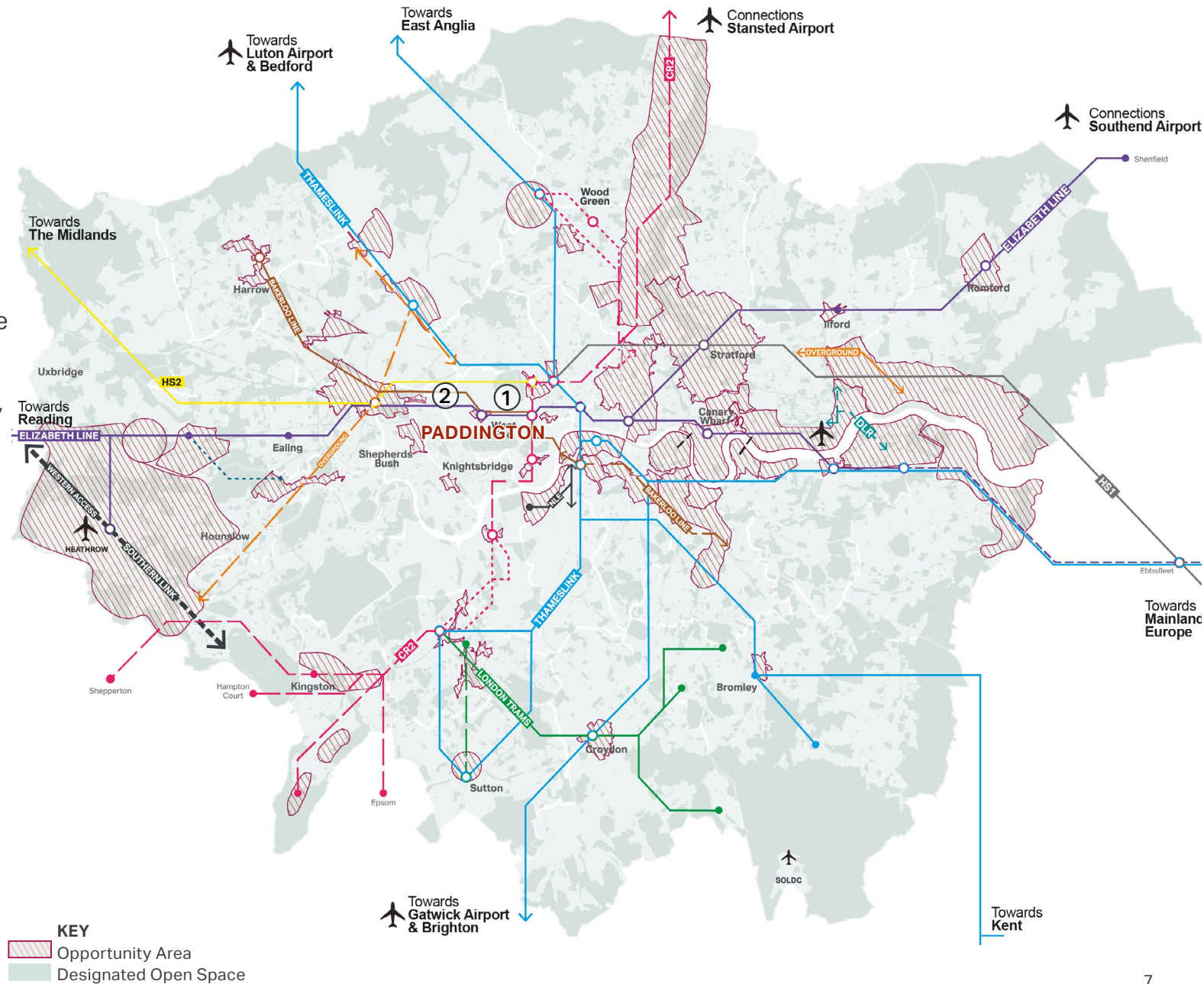


Source: Areas of Regeneration as per London Plan 2021

Paddington Context

Transport and Growth Corridors

- ① Paddington is in the Elizabeth Line Corridor. The station has undergone major transformation and connectivity has improved significantly.
 - ② The upgrade of the line will **increase the capacity of the trains** to 150,000 extra public transport trips a day and improve reliability by increasing the number of trains per hour from 20 to 27 resulting in a train every 2 minutes at peak times.
- A new and improved line will also **support the development of new homes, additional commercial floorspace and more green areas in London's opportunity areas** across the existing line including Paddington.
 - If central government approves plans for the extension and the funding needed is secured, construction could begin as early as 2030.



Paddington Context

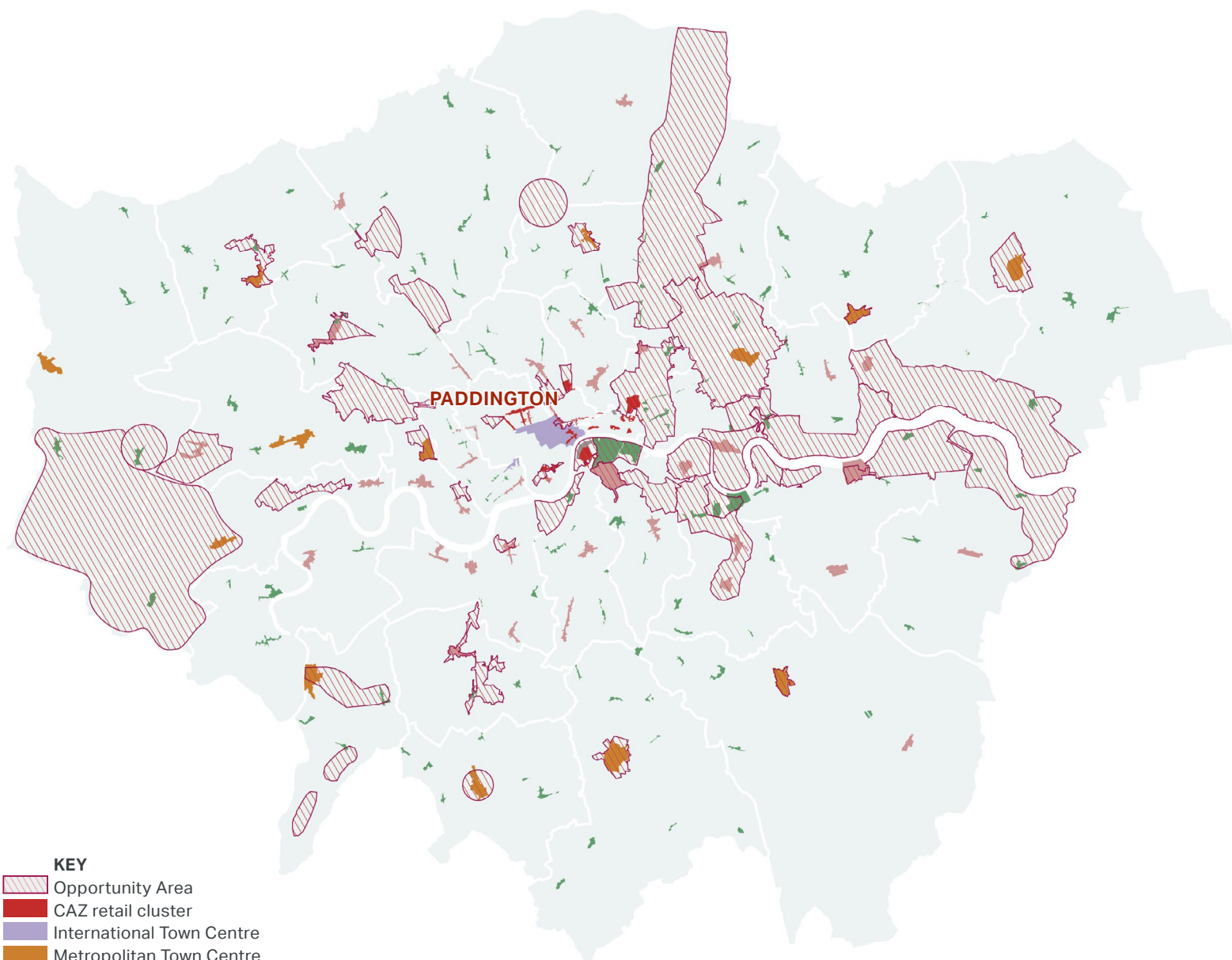
OAs and Metropolitan Town Centres

- 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)

Praed Street is a District Centre that is in the OA (south).



Praed Street in Paddington



Source: Planning Data Map

Paddington

Key info

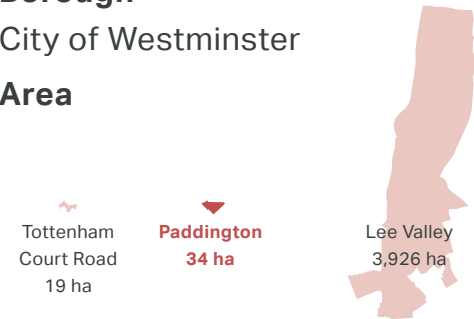
London Plan Designation Year



Borough

City of Westminster

Area



OA specific plans

N/A

Local Plan status

City Plan adopted in 2021 (including Policy 3 for the POA). The council is undertaking a Partial Review of the City Pla, but Policy 3 is not in scope.

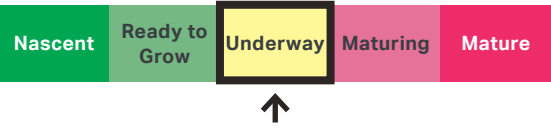
Growth Corridor

Central London Growth Corridor

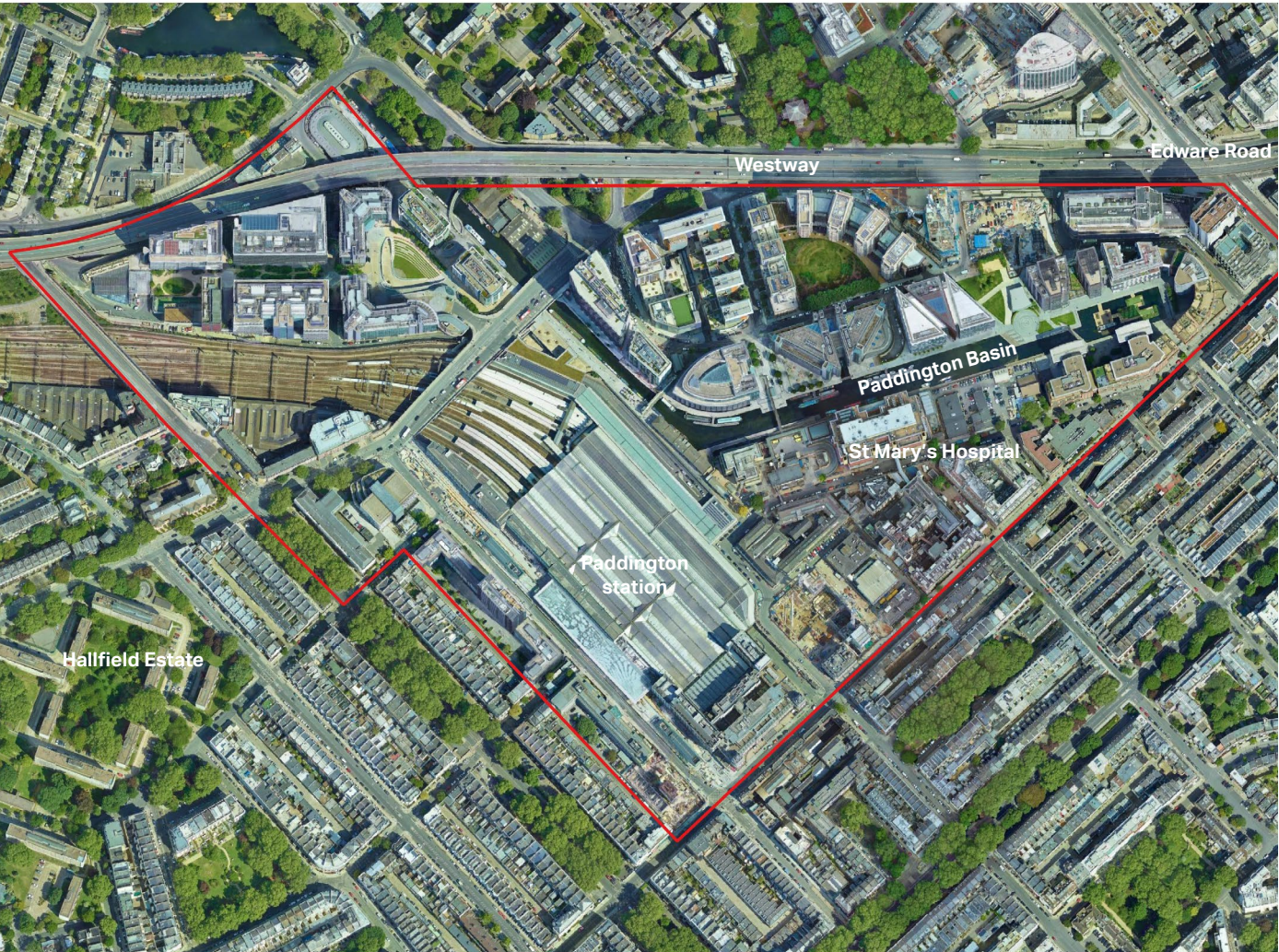
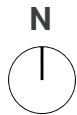
Housing Delivery Test 2023

None

OA status (London Plan 2021)



London Plan 2021 capacities by 2041



Source: Google Earth

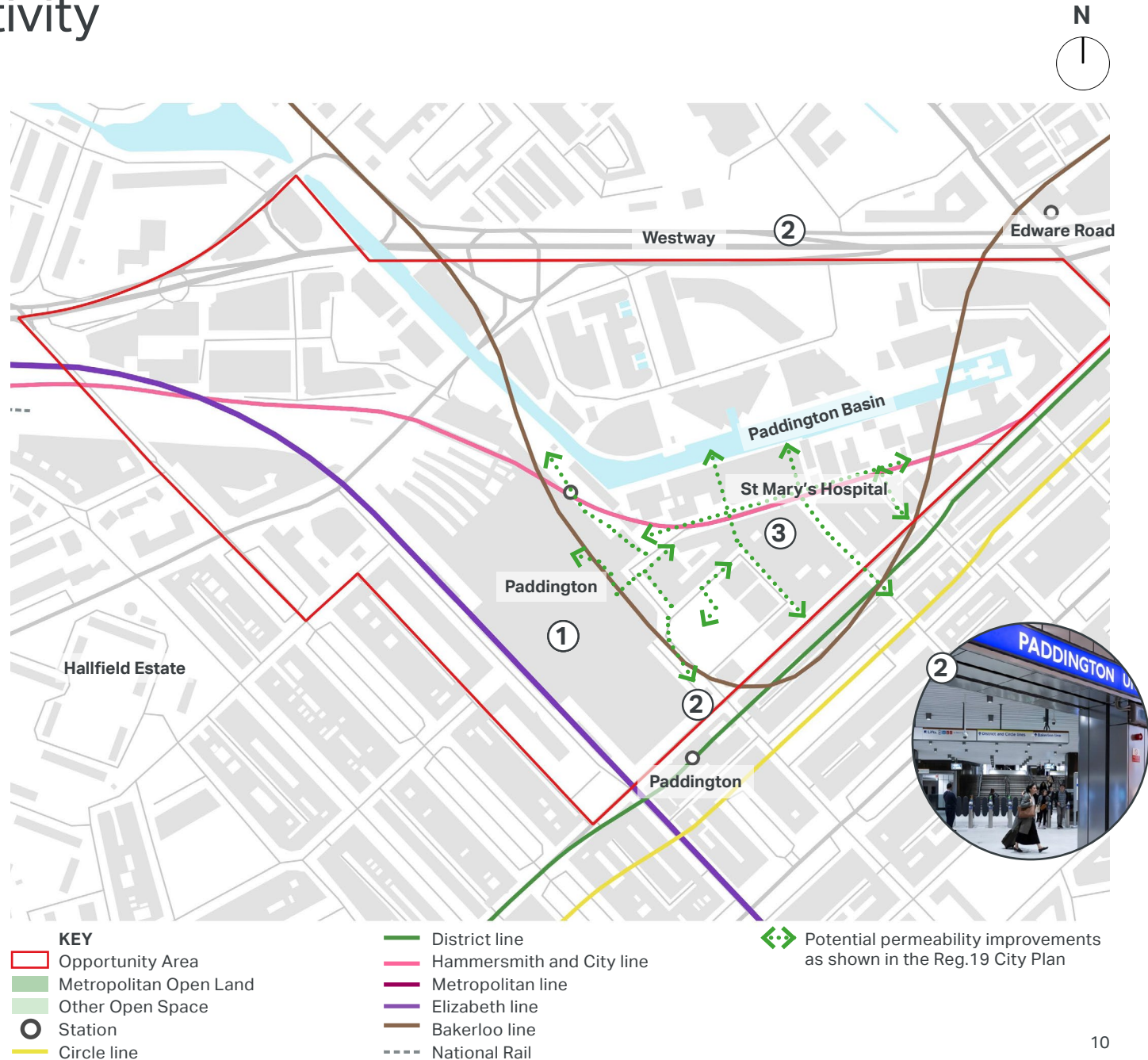
*Note that the LESD (2021) reduces the capacity to 7,700 new jobs



Paddington

Transport and connectivity

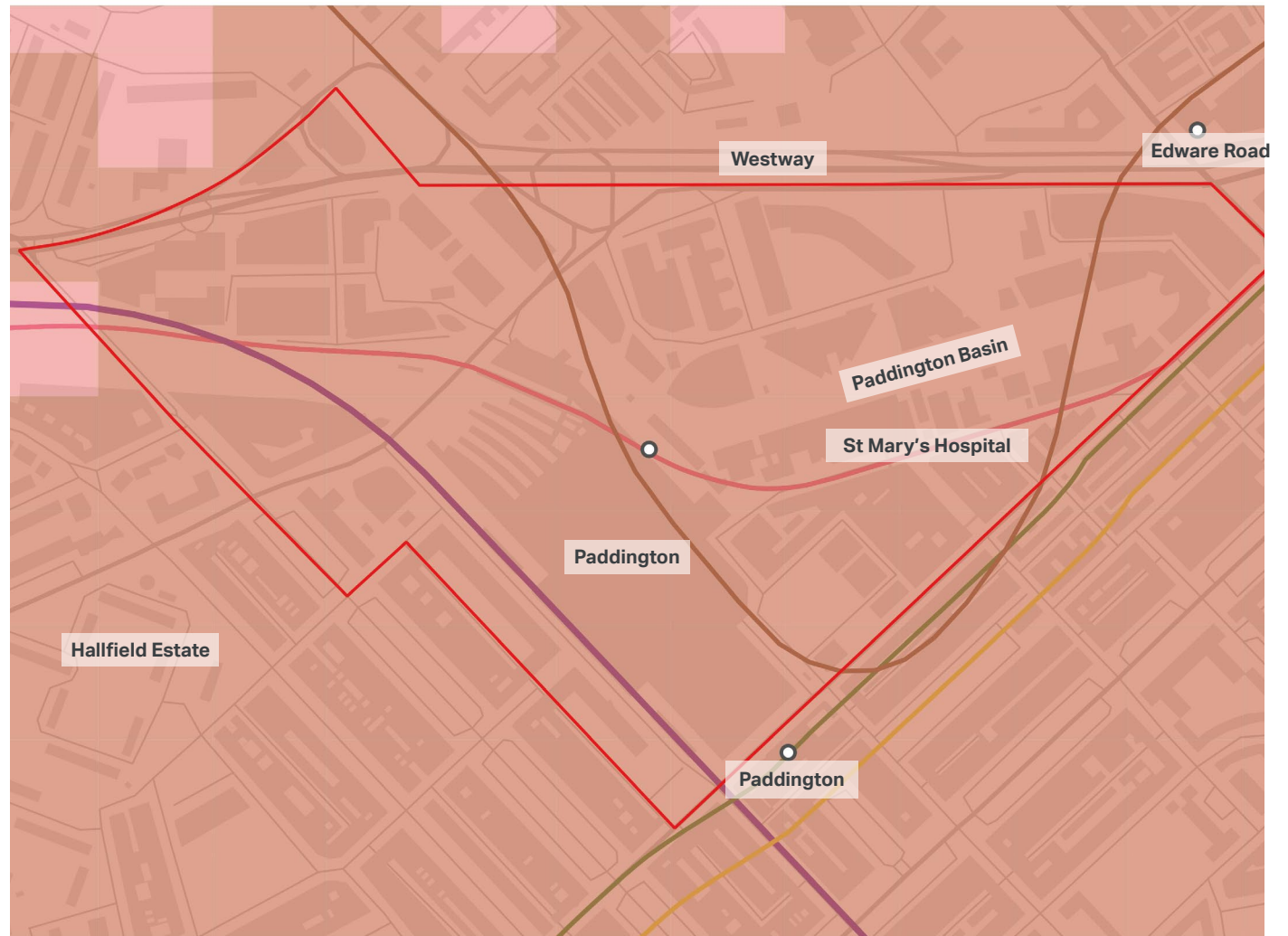
- Part of the Central London Growth Corridor.
 - Well-connected area, with TfL identifying it as an OA where transport it is not holding back development.
- ① Elizabeth Line station opened in 2022, contributing to the area's growth.
 - ② Transport Projects: A40 Westway (next phase to begin in 2024), Paddington Bakerloo ticket hall, opened in 2024.
 - ③ Potential to enhance activation along Paddington Basin (St Mary's Hospital), and improve west - east permeability.



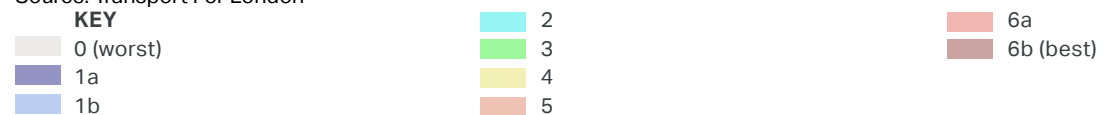
Paddington

Transport and connectivity: PTAL 2031

- Highest PTAL



Source: Transport For London



Paddington

Delivery of homes

Delivery pre-2019

Completions against capacity

LP 2004	3,000
LP 2008	3,000
LP 2016	1,000
Completed	1,337

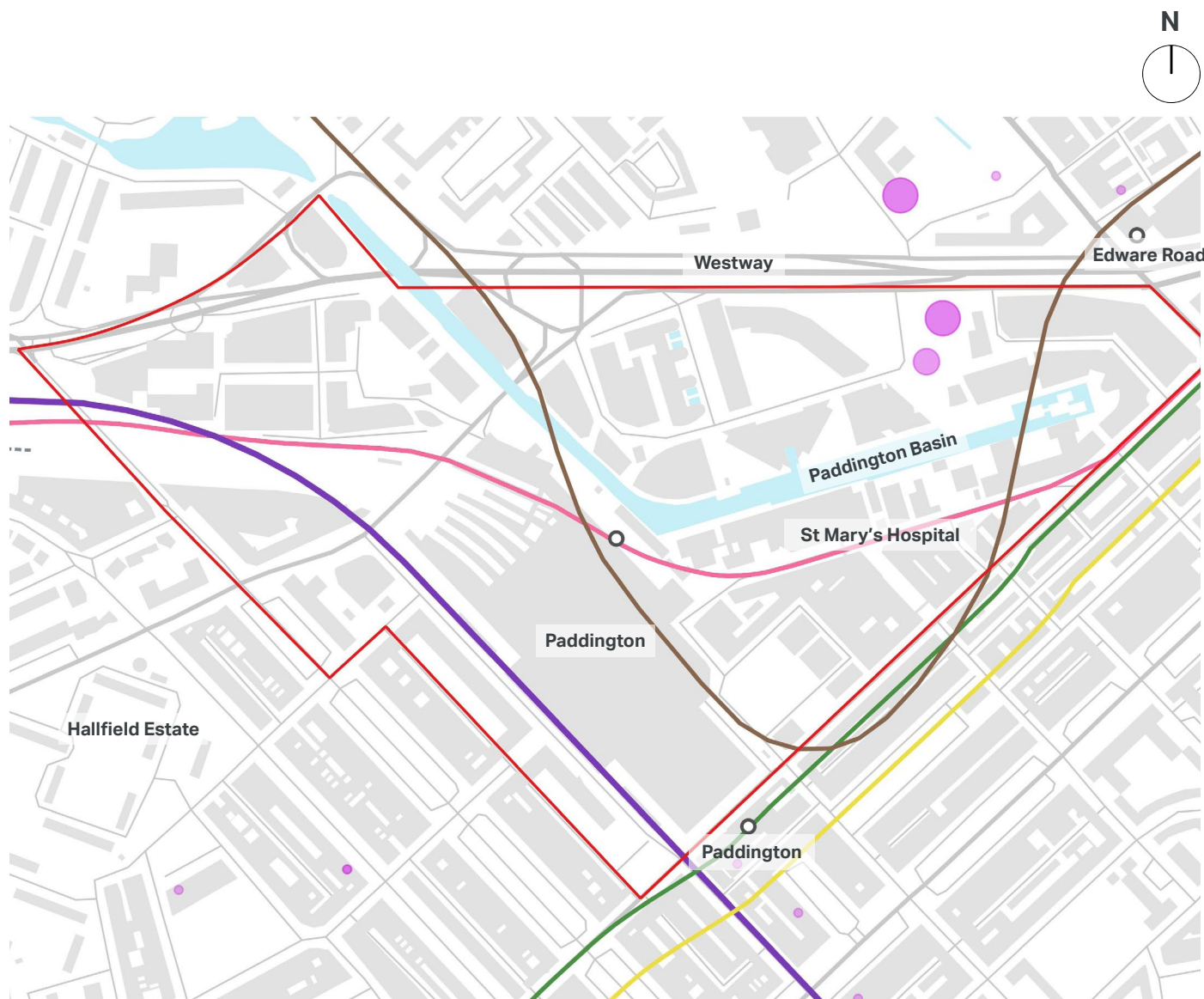
The OA delivered more than 1,300 homes since its designation, this is 50 per cent of what was anticipated at designation.

Delivery post - 2019 (London Plan 2021)

Progress against 22yr, 10 yr capacity

22 yr	1,000
10 yr	335
Completed	304
Pipeline	341

OA has reached the 10 yr homes capacity and is on track to meet the 22 yr one. There is a live application for 341 units at Harbet Road, which if implemented will result in a significant increase in residential development.



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

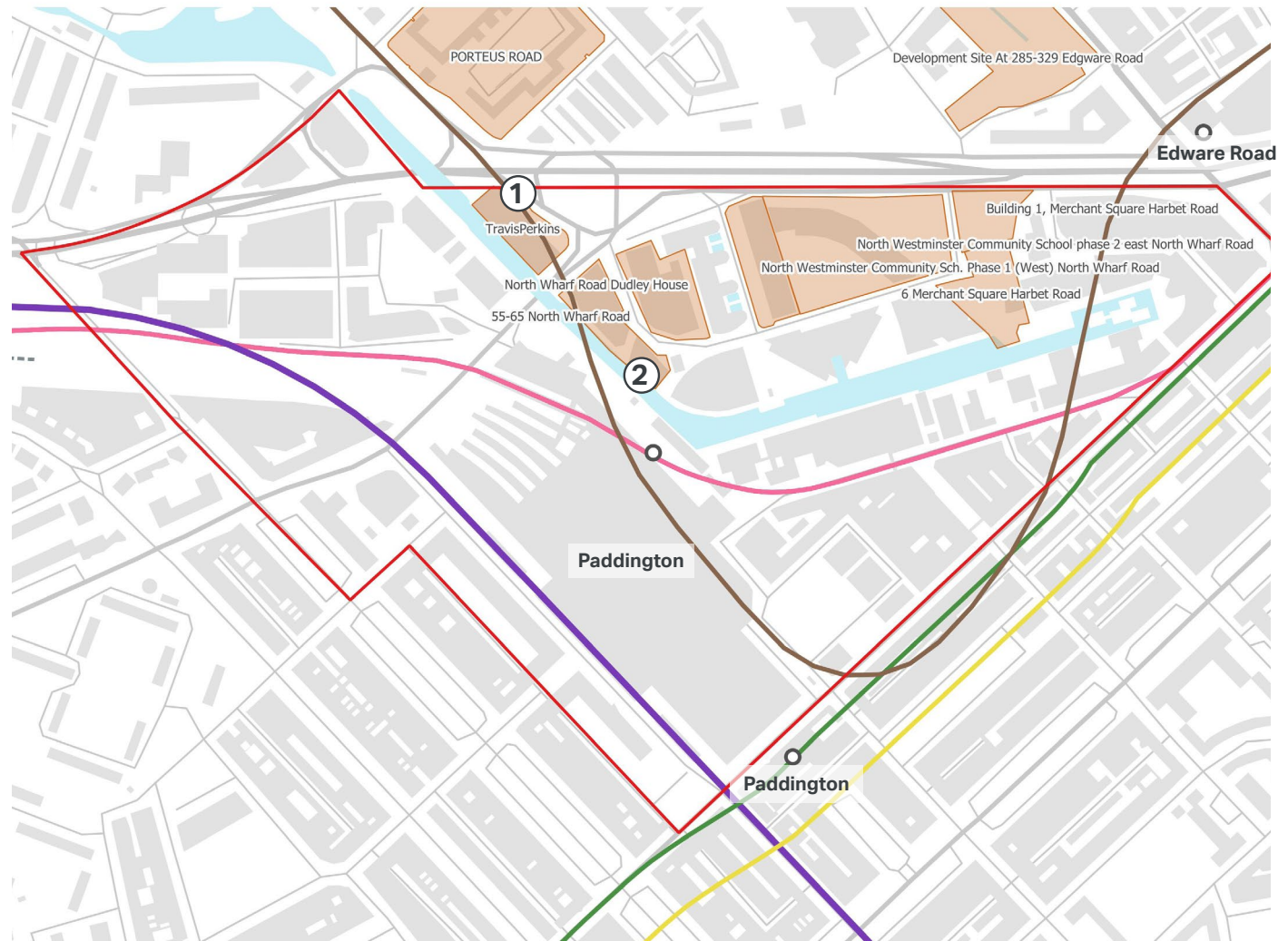
Olympic Legacy

SHLAA 2017: Approvals and Allocations

- ① Revised plans for the residential-led redevelopment have been submitted to Westminster City Council to build 768 student rooms and new public access along the towpath. The plans include industrial co-location. Committee recently voted to refuse this application.



- ② Brunel Building completed in 2019, 243,000 sq ft office space.

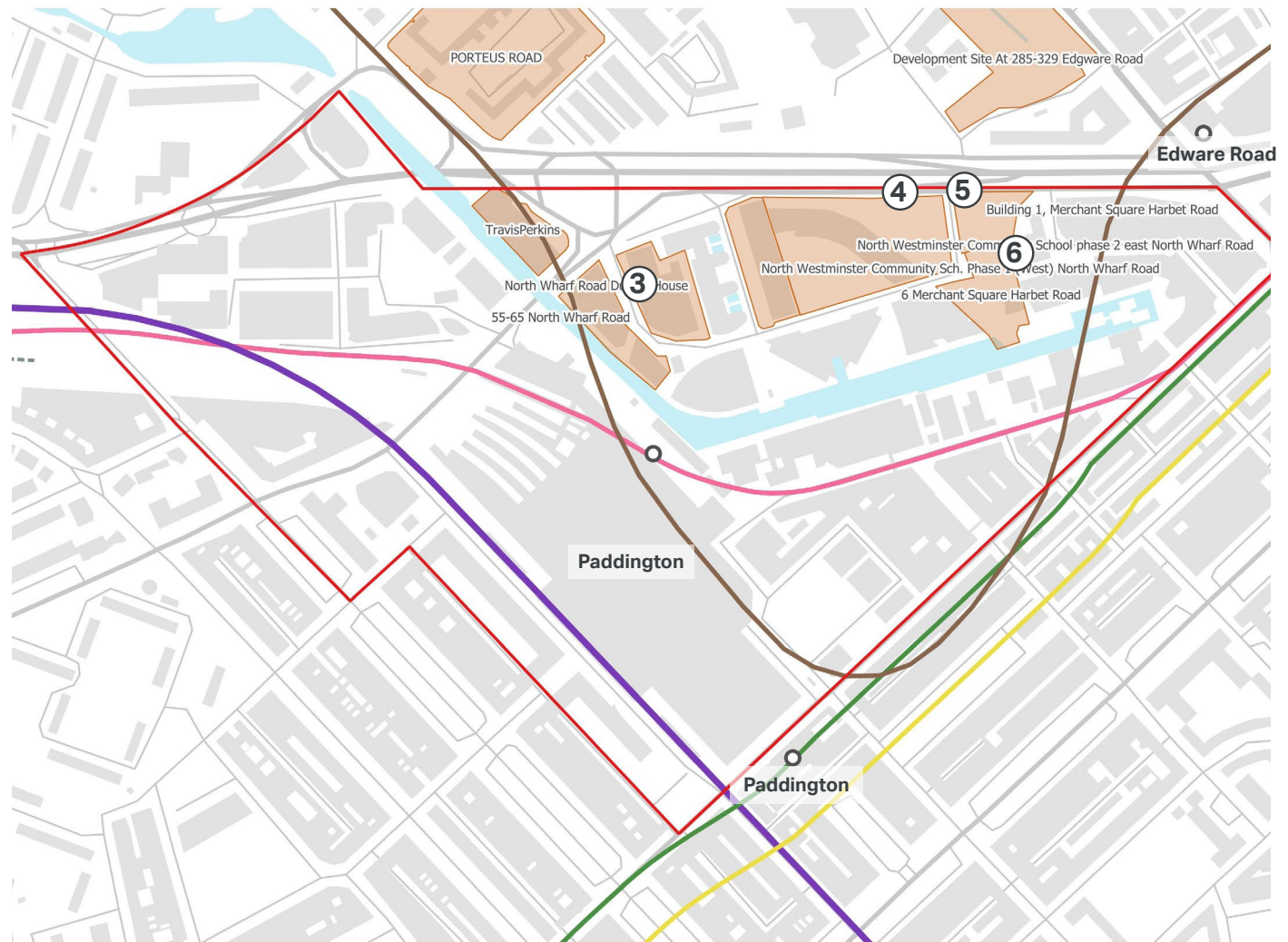


- KEY**
- Opportunity Area
 - Approvals and Allocations (SHLAA, 2017)

Olympic Legacy

SHLAA 2017: Approvals and Allocations

- ③ Completed in 2019, 197 homes (intermediate rent).
- ④ Completed in 2021, 642-room hotel and hybrid aparthotel development across 19 floors as well as 27,000-square-feet of social and community floorspace.
- ⑤ 1 Merchant square; Gained approval in 2019, 173,000 square feet office space. Site is vacant/ stalled.
- ⑥ 6 Merchant Square; 155 homes and office space.



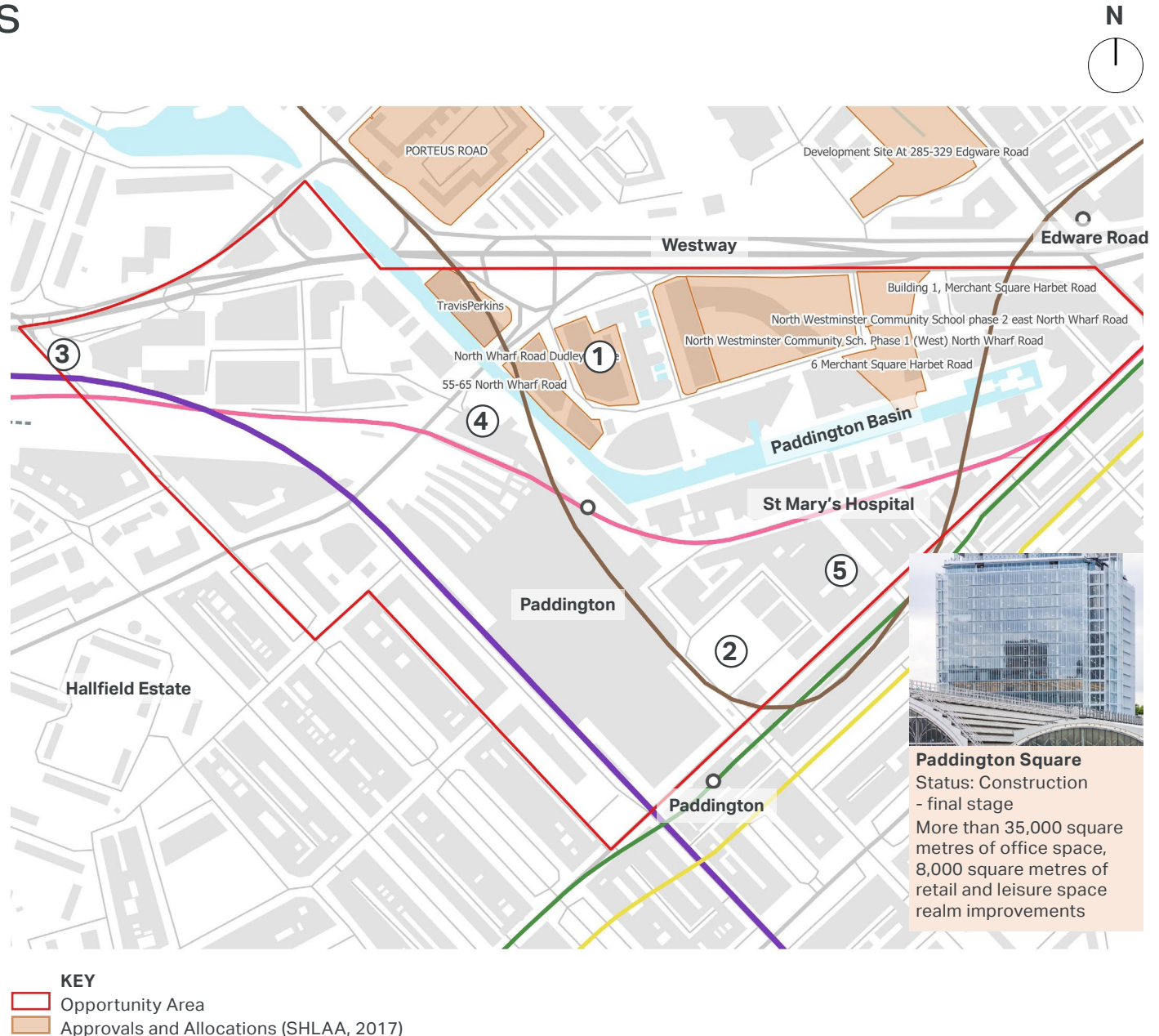
KEY

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

Paddington

SHLAA sites - progress

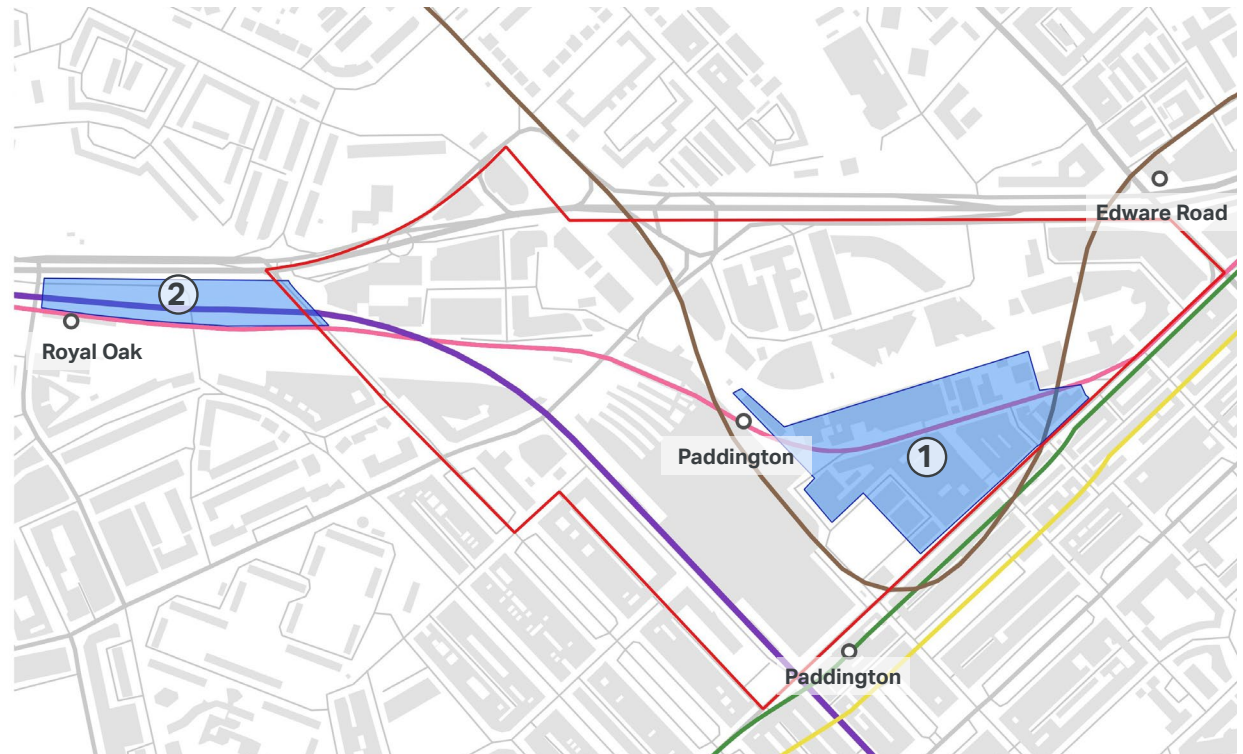
- ① Most sites already developed in previous plan periods.
- ② Paddington Square is in late stages of construction.
- ③ Paddington tower approved by the Mayor in 2020, 50,000 square metre office scheme.
- ④ The Paddington Overstation Development, located by Grand Union Canal and close to the new Elizabeth line station, has been designed by Grimshaw and features a 19-storey building running to 235,000 sq ft with work set to start in 2026.
- ⑤ St Mary's Hospital site redevelopment;
 - Potential to embark on detailed design and planning in 2024.
 - Westminster City Council has consulted on a draft Site Allocation policy for St Mary's in its City Plan Partial Review (now at Examination). The allocation is for mixed-use, including a new hospital.
 - Main building works past 2030.



Paddington

City Plan (2021)

- The current City Plan was adopted in April 2021.
- City of Westminster launched a partial review of the City Plan 2021. The Partial Review introduces five new policies and updates the affordable housing one.
- The OA is not in scope - the most recently adopted policy for Paddington OA is Policy 3 in the adopted City Plan (2021). According to this policy, key spatial priorities for Paddington OA include:
 - The achievement of the London Plan capacities.
 - New workspace through an expanded range of offices, light industrial units and workshops.
 - Inclusive and high-quality public realm
 - Enhanced sustainable travel modes, including public access to the canal waterfront.
 - Reduced severance from surrounding areas including Church Street, Edgware Road station, the North West Economic
 - Enhanced job opportunities and community facilities for the residents.



- The City Plan allocates four key and highly complex brownfield sites in the city for significant levels of new development: St Mary's Hospital, Westbourne Park Bus Garage, Land adjacent to Royal Oak and Grosvenor Sidings.
- ① St Mary's Hospital is in the OA (within the OA)
- ② Westbourne Park Bus Garage

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Development activity 2021

- Already in 2021 there was little land available for growth, and that was primarily located at the edges of the OA.



Source: vu.city

KEY	
■	Consented
■	Under construction
■	Completed

Paddington

Development activity 2024

- Major sites are either being consented or almost completed (Paddington Square).



Source: vu.city

Source: vu.city

KEY

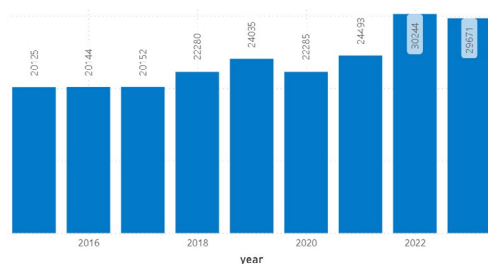
- Consented
- Under construction
- Completed

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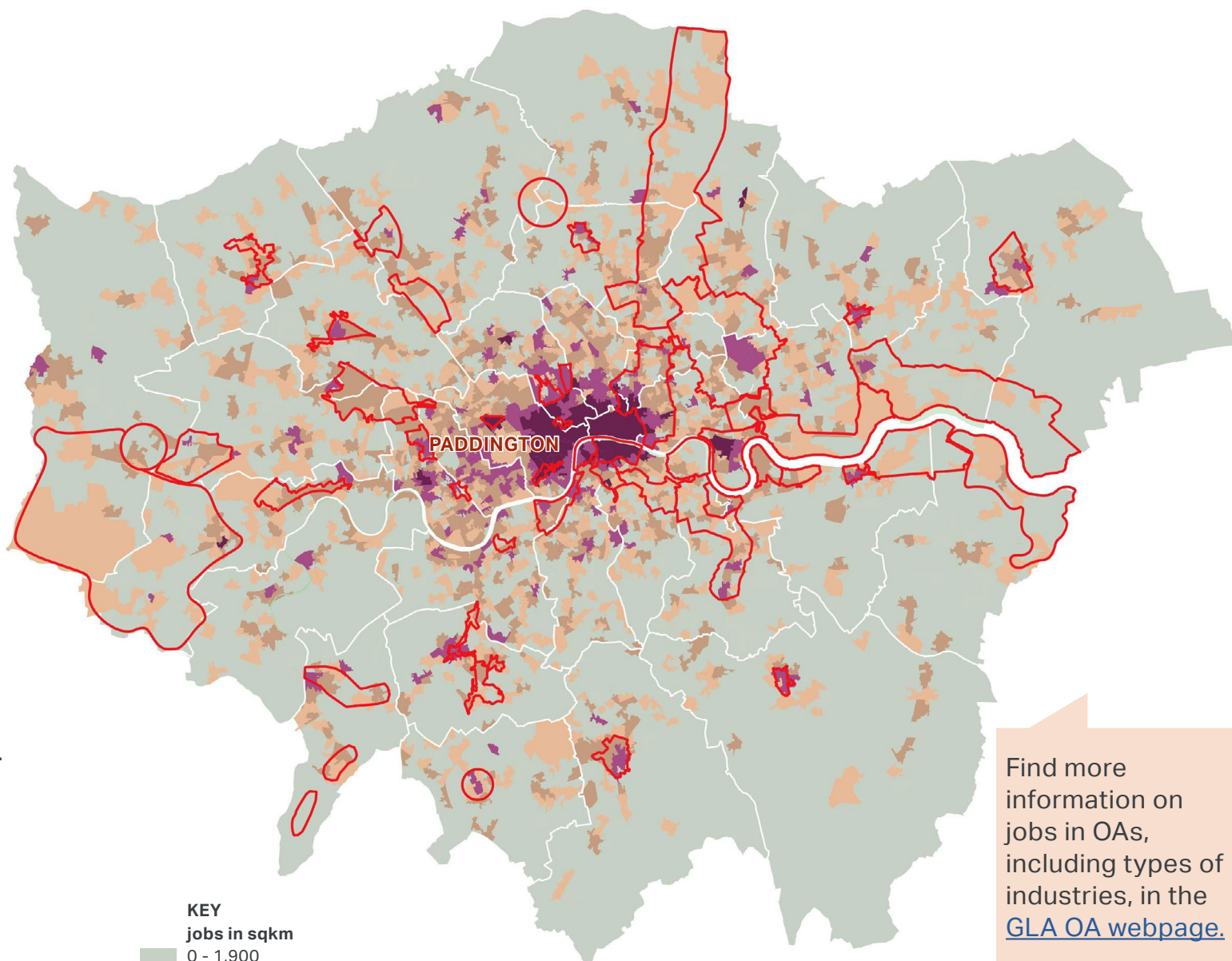
Jobs

- In 2023, there were more than 29,700 jobs in the OA, placing the OA just outside the top 10 OAs with the highest number of jobs.
- Paddington OA accounts for 4 per cent of the jobs in Westminster (2023).
- Over 75,800 net sqm of Class E floorspace is currently under construction. Over 87% of this will be office space, creating an estimated 5,900 jobs. Over 8,500 sqm of retail floor space will also be created, generating an estimated 487 jobs. ([City of Westminster AMR \(2022/2023\)](#)).
- Historically, since its designation the OA delivered significant floorspace in previous plan periods pre -2010.

Jobs by year in the OA



Source: Census, Business Register

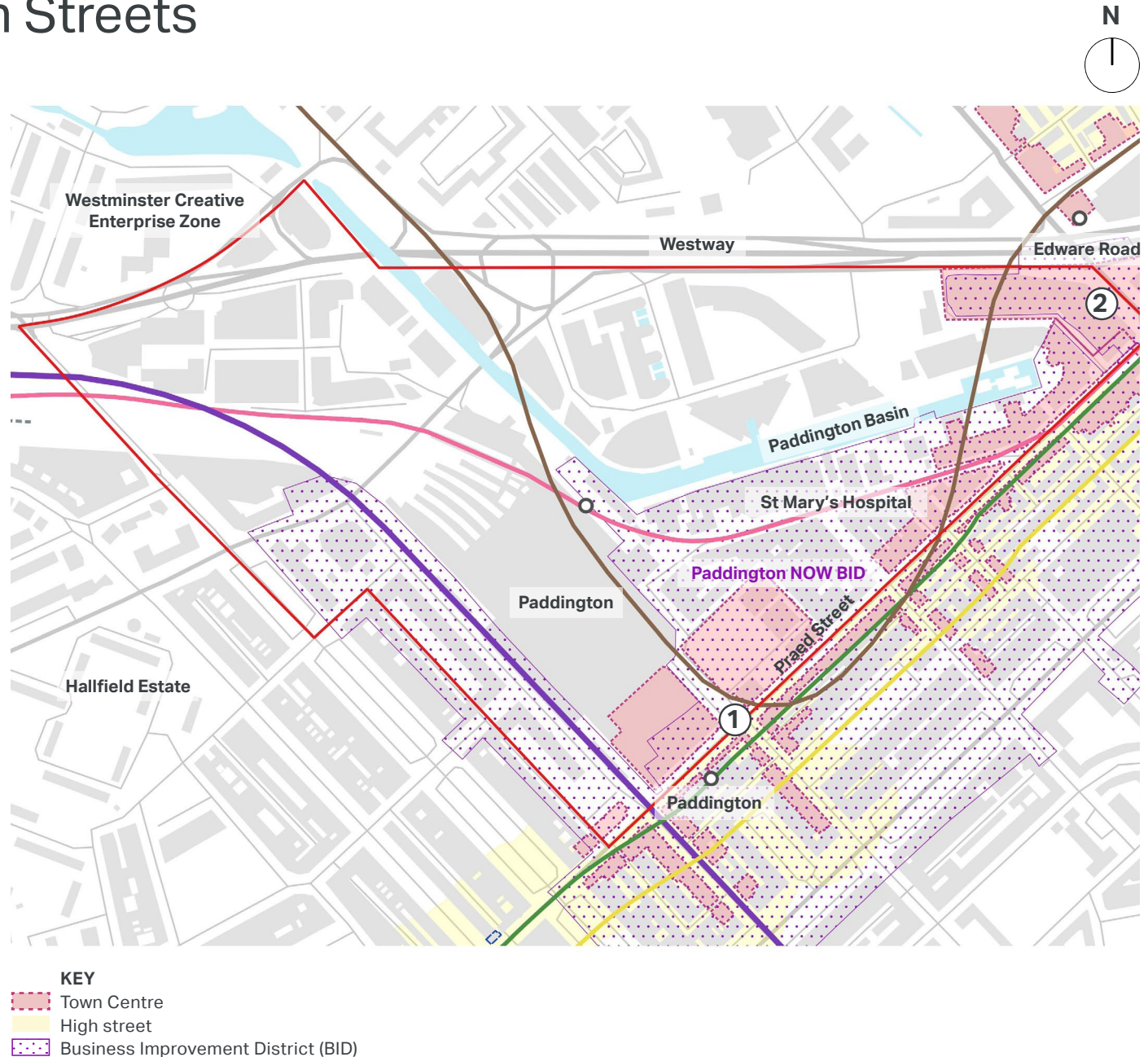


Find more information on jobs in OAs, including types of industries, in the [GLA OA webpage](#).

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Town Centres and High Streets

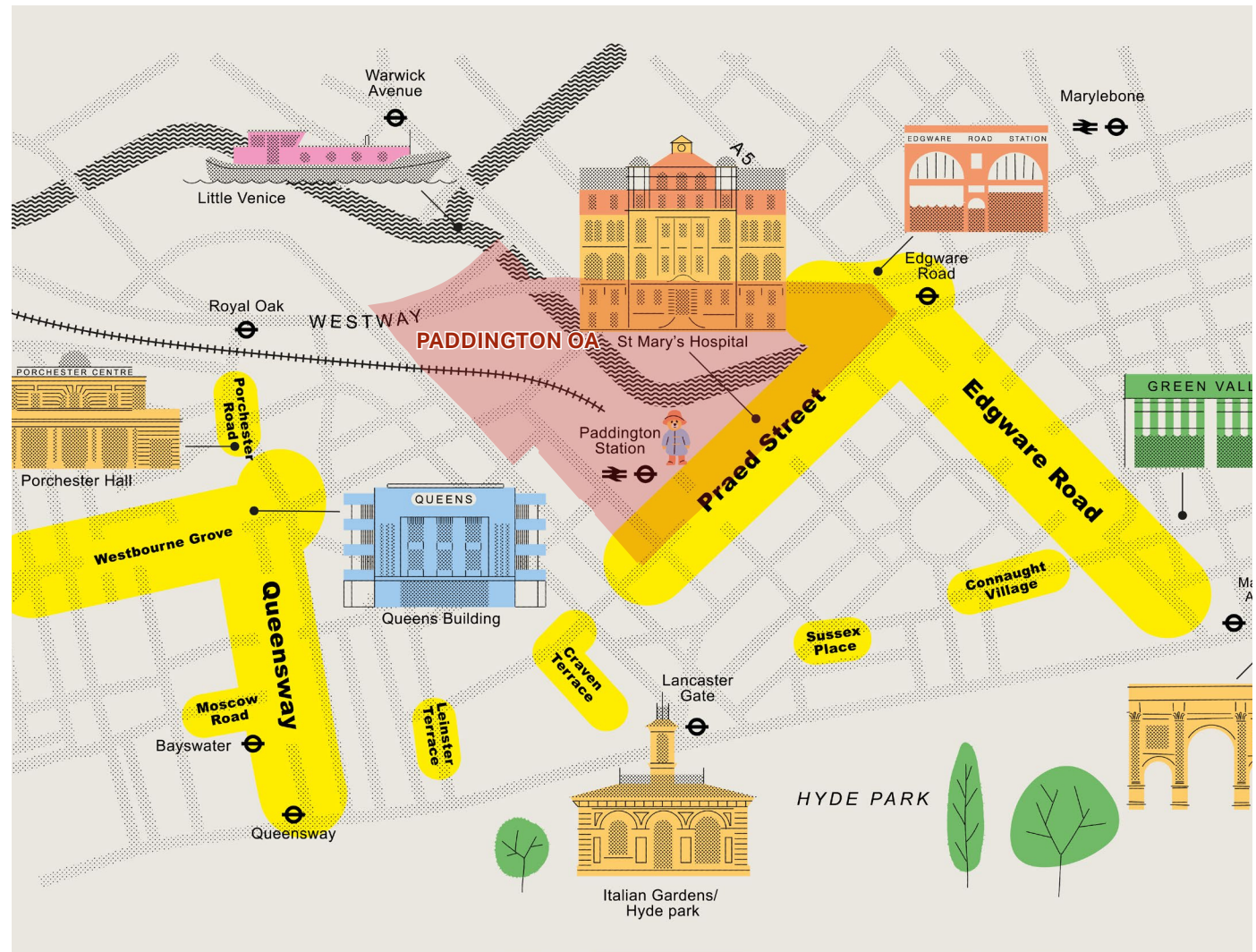
- Key town centres relevant to the POA are:
 - ① Praed Street (District) and
 - ② Edgware Road (South)(CAZ Retail Cluster).
- Public realm development programs as part of the BID, and new developments coming forward (Paddington Central, Kingdom Street).
- OA is adjacent to Craven Road, Spring Street High Street.



Paddington

Town Centres and High Streets

- In 2023, the Council launched the [Westminster High Streets Programme](#) and committed to capital funding of £10 million to improve local High Streets outside of the West End.
- The vision is to make them the backbone of thriving neighbourhoods where goods, services and green spaces are a walking distance from residents' doorsteps.
- The diagram shows the extent of the programme as suggested by Westminster. The POA is shown in red.
- There are two place-based High Streets Programmes in Paddington and Bayswater, and North Paddington.

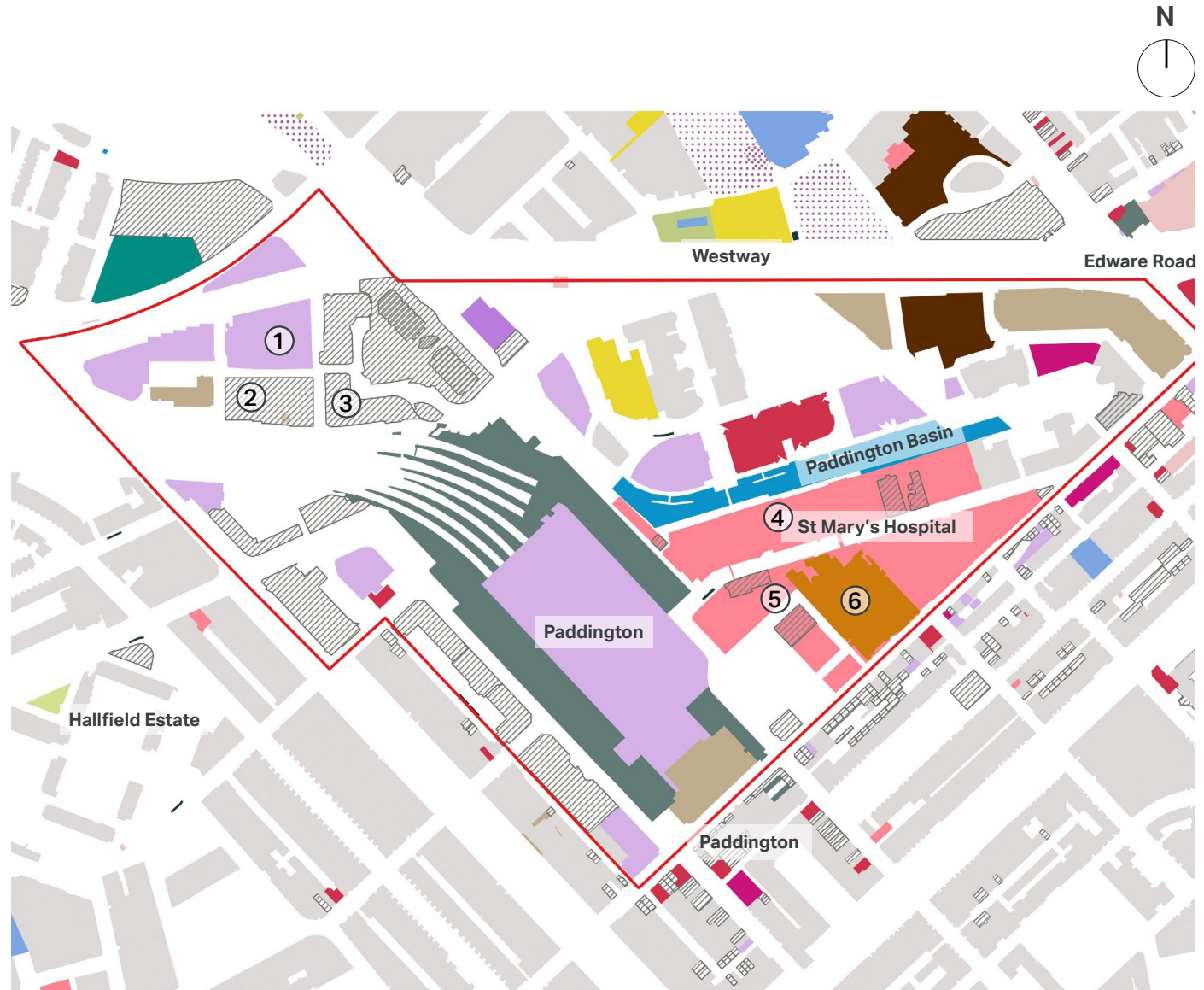


Source: City of Westminster; [High Streets Programme area](#)

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Land uses

- Business nature of the OA is evident.
- St Mary's Hospital (Medical & Healthcare) occupy a large part of the OA.
- Recent development delivered co-working spaces and events venues (Paddington Works).
- Life science and innovation cluster (Paddington Life Sciences).



Source: OSNGB, City Intelligence Unit (GLA)

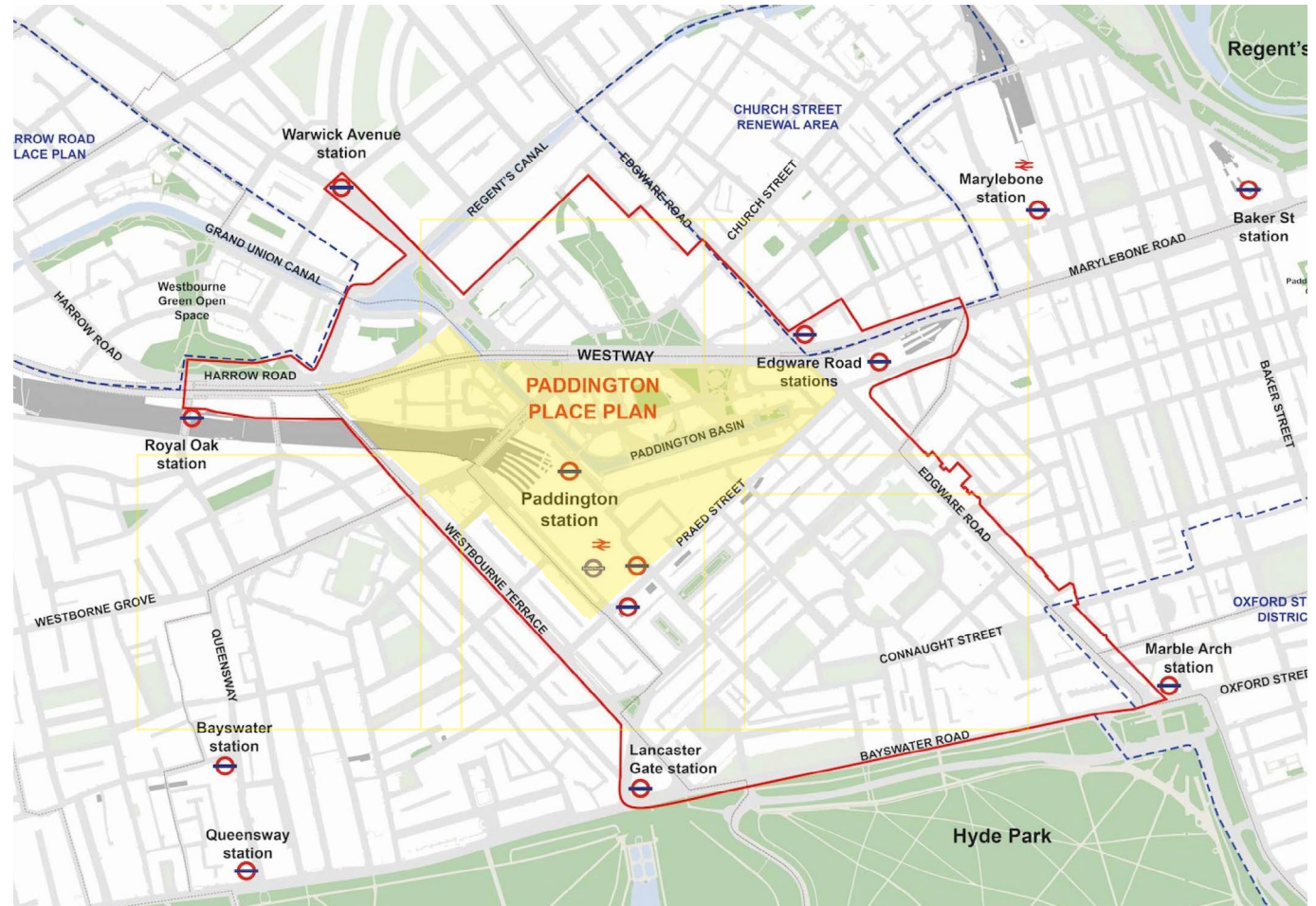
Paddington Life Sciences

- | | | |
|-----------------|---|---------------------------------------|
| ① Vertex Pharma | ③ Digital Collaboration Space | ⑤ NIHR InVtro Diagnostics Cooperative |
| ② Takeda | ④ Imperial College Healthcare NHS trust | ⑥ Imperial College St Mary's Campus |

Paddington

Place strategies: [Paddington Place Plan](#)

- The Paddington Place Plan is an evolving plan for the Paddington area led by the Place Shaping team. It aims to deliver on the Paddington Opportunity Area and North West Economic Development Area (NWEDA) policies as set out in our City Plan 2019-2040.
- As Westminster's largest growth area, surrounded by areas of high-level deprivation, the Place Plan aims to ensure greater equity, continuity and cohesion across emerging and future proposals.
- Recent projects include the following:
 - Public Realm Strategy (See following page)
 - Paddington and Bayswater high streets
 - Warwick Avenue



Source: City of Westminster



Paddington

Place strategies: Paddington Public Realm Strategy

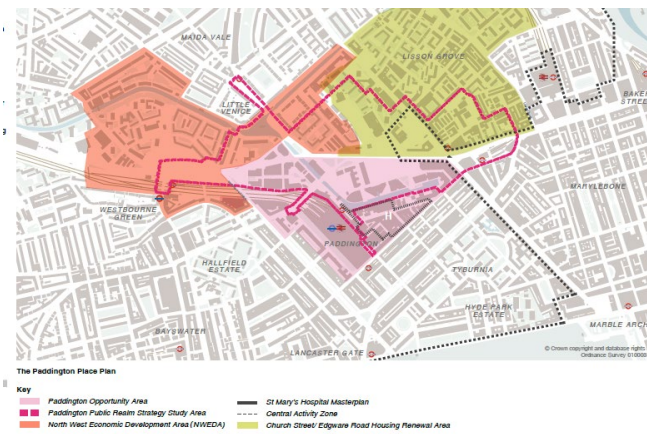
- ① The Paddington Public Realm Strategy sets out a masterplan for the area on either side of the Westway, between Royal Oak station and Edgware Road Stations, including Paddington Basin, Warwick Avenue, Bishop's Bridge, the Canal and Paddington Green. As shown on the image below; this includes part of the Paddington OA (OA shown in pink)
- The document outlines the council's aims to transform Paddington's fragmented neighbourhoods into vibrant, healthy, and inclusive areas by rebalancing the environment and providing safe spaces for pedestrians and cyclists.
- ② The strategy develops an urban framework split in three thematics: Dynamic Places, Healthy Landscapes, Legible Routes.
- ③ The strategy puts forward links between these divided places to mitigate the current fragmentation, whilst supporting anticipated development in the area.
- ③ The project team have identified a series of 'Key Places' around which more detailed interventions were developed.



③ Key Places as identified in the Paddington Public Realm Strategy (2023)



① Public Realm Strategy (February 2023)



② The Paddington Place Plan



③ Visual links across Harrow Road and the Westway to St Mary's Square (Impression of intervention)

Paddington

Moving forward

- The OA has delivered a high number of homes (almost 70 per cent of the indicative capacity).
- The OA has already delivered 81% of the expected jobs as per LESD.
- Over 75,800 net sqm of Class E floorspace is currently under construction. Over 87% of this will be office space, creating an estimated 5,900 jobs. Over 8,500 sqm of retail floor space will also be created, generating an estimated 487 jobs. ([City of Westminster AMR \(2022/2023\)](#)).
- Historically, since it's designation the OA delivered significant floorspace in previous plan periods pre -2010.
- There are some opportunities for mixed-use developments:
 - St Mary's Hospital and Paddington Station.
 - There are some sites in the pipeline and some smaller opportunities for new jobs and homes, building on the Elizabeth Line arrival.
- The OA will continue to play an important role in the city (Innovation Cluster).
- Public realm improvements and projects that bring existing communities together could still be supported, but it the OA does not seem to be a future focus for growth.
- There is a clear north - south split of the communities that live in the OA.

Proposition

- OA to be moved from 'Underway' to 'Maturing'.
- Opportunities for development: Paddington Station and St Mary's Hospital.
- The Grand Union Canal and the Paddington Basin are already strong assets to the area providing a sense of place. There are opportunities to further improve these waterside places.

