

# Opportunity Area Portrait

## Euston



# 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.

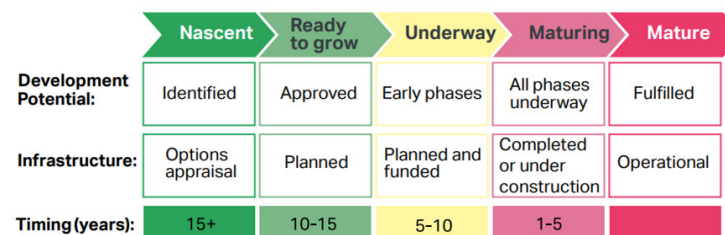
#### OA boundaries

- 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



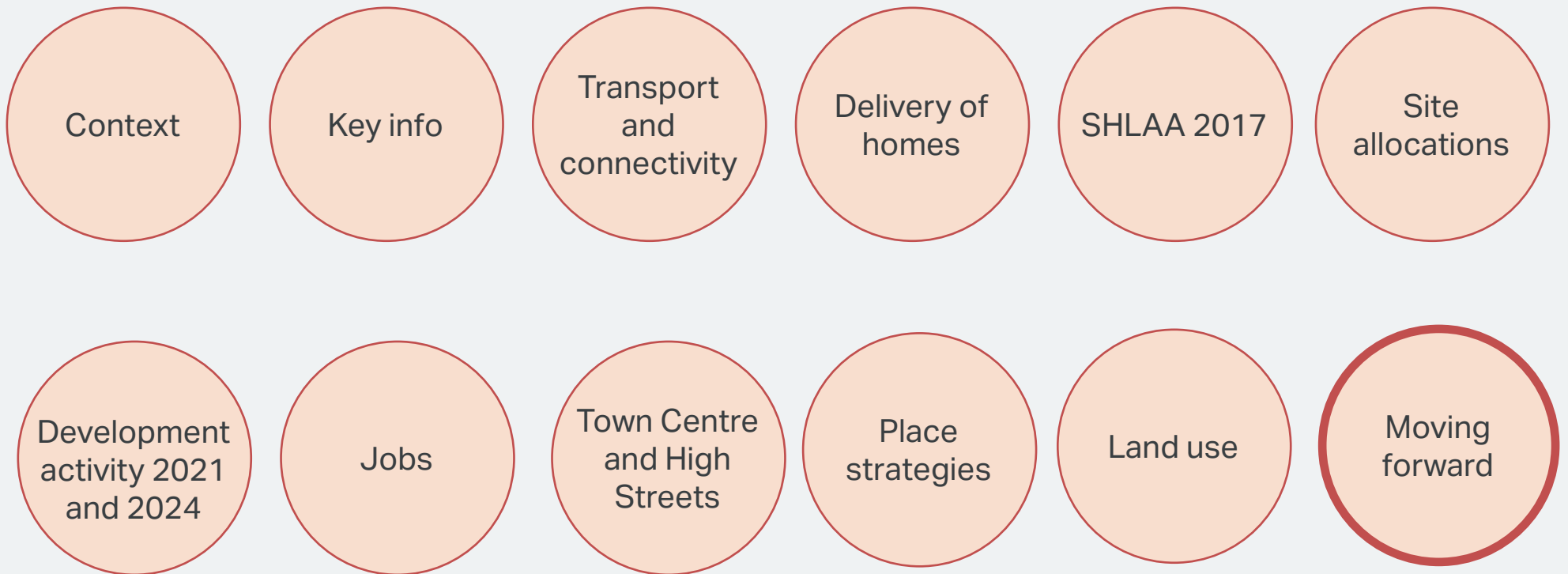
### Additional resources

- 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.

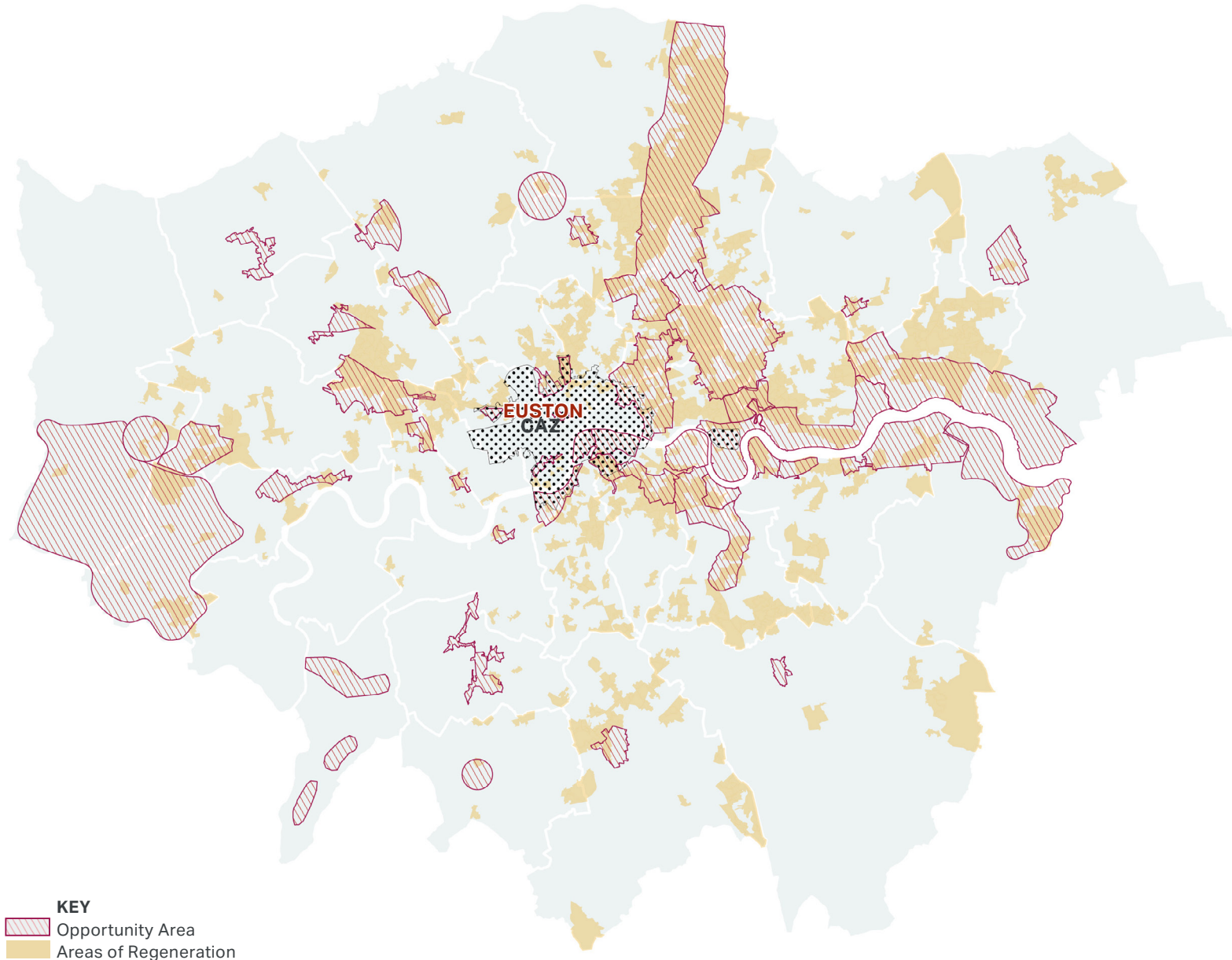
# Euston Context

## OAs in the Central Activities Zone (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

The OA overlaps with an area of regeneration.

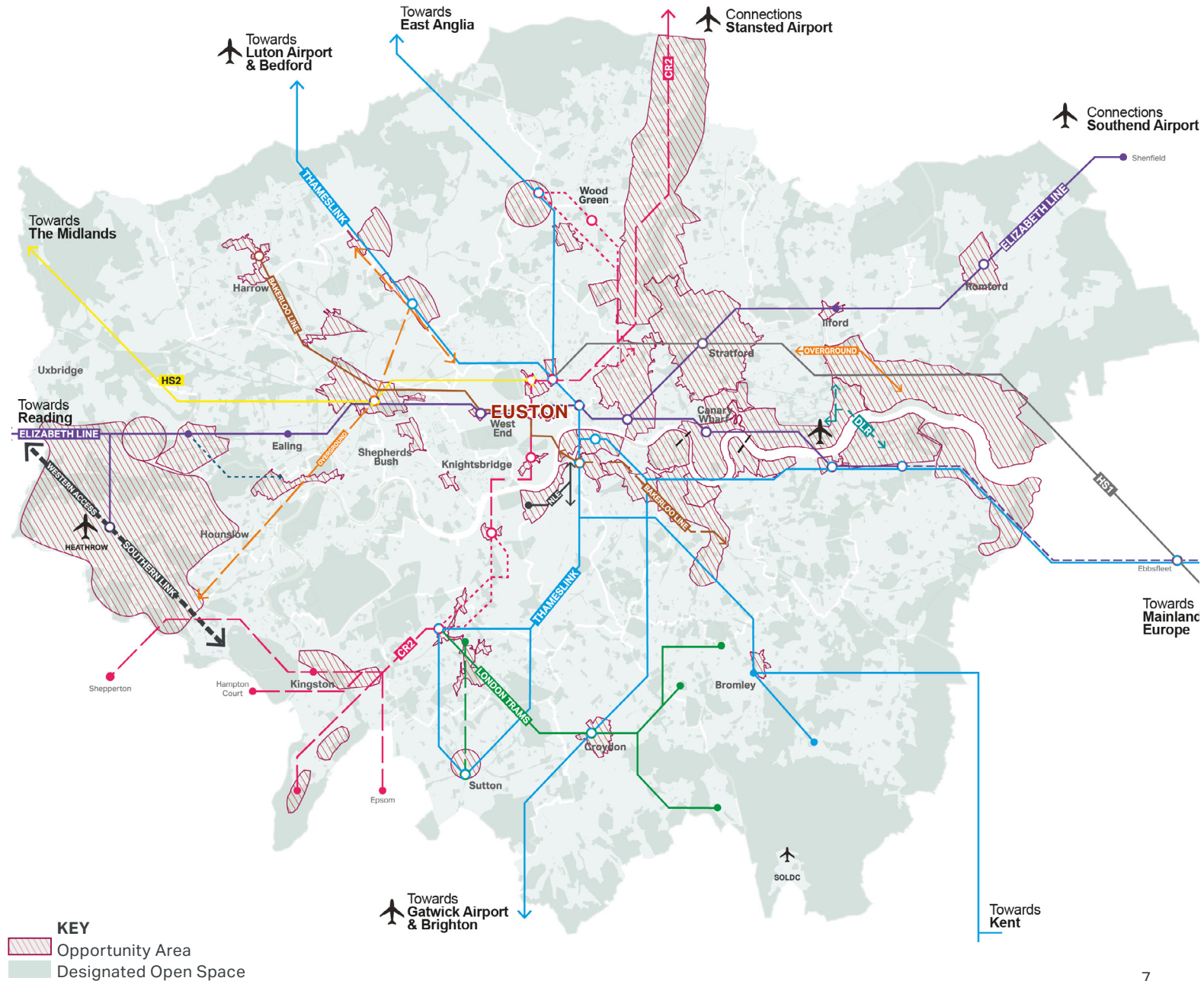


Source: Areas of Regeneration as per London Plan 2021

# Euston Context

## Transport and Growth Corridors

- Well connected OA served by several London Underground lines and London Overground services.
- Potential delivery timescales for Crossrail 2 (CR2) (a major new line connecting south west London to north east London) are now beyond 2040.
- High Speed 2 (HS2) proposed to be constructed to Euston.



Source: [Planning Data Map](#)



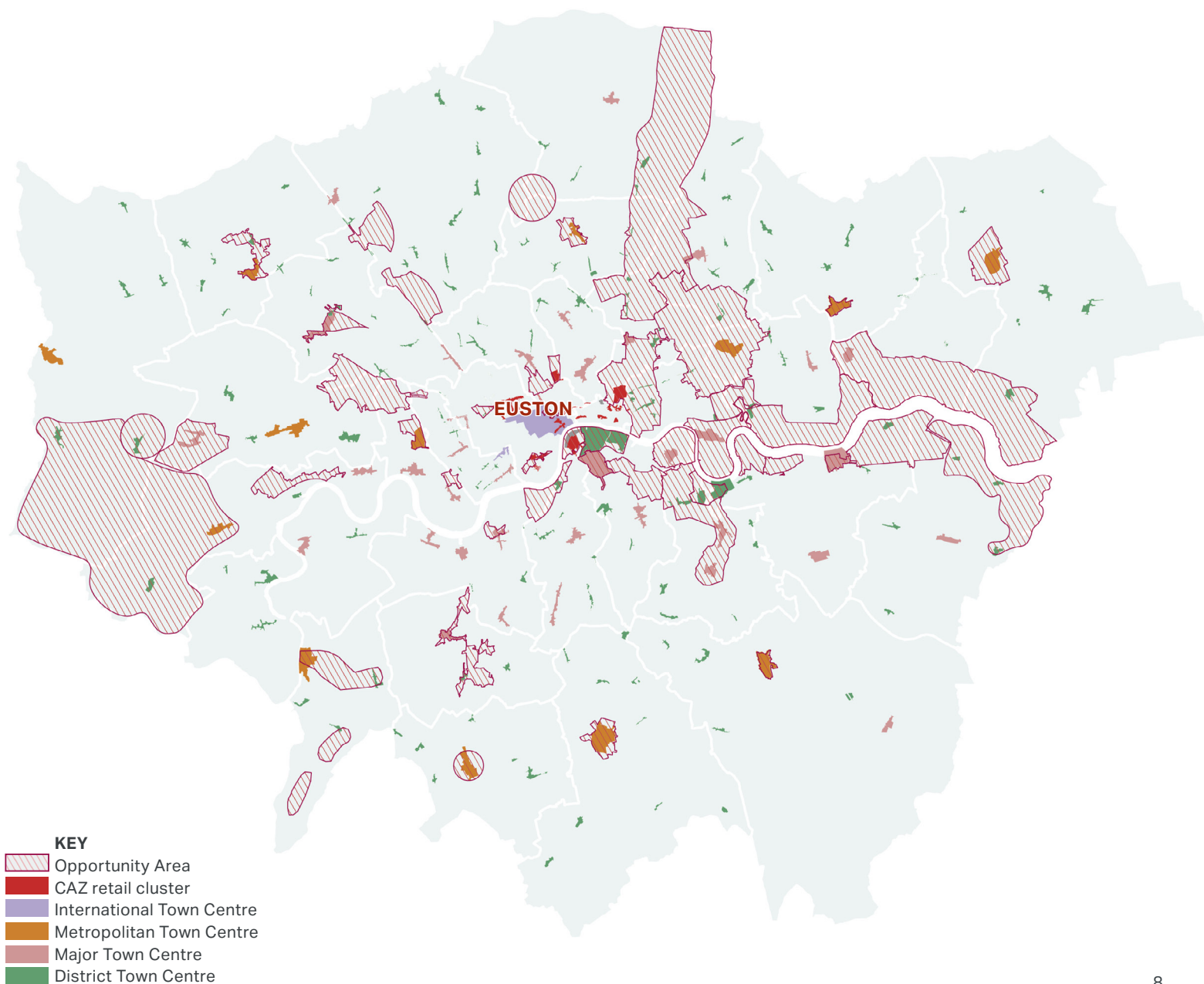
# Euston

## 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)

No town centres in the OA.



Source: [Planning Data Map](#)



# Euston

## Key info

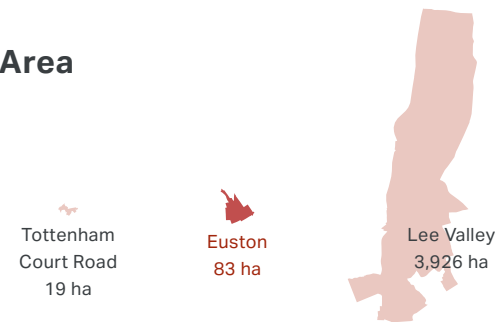
### London Plan Designation Year

2004	2008*	2011	2016	2021
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### Borough

LB Camden

### Area



### OA specific plans

Adopted Euston Area Plan (EAP) 2015. EAP is currently under review.

### Local Plan status

Regulation 18 consultation

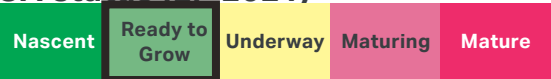
### Growth Corridor

Central London

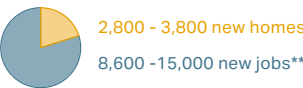
### Housing Delivery Test 2023

Presumption

### OA status (LP 2021)



London Plan 2021 capacities by 2041



Source: Google Earth

KEY  
Opportunity Area

\* Euston OA was identified as an area of intensification in the London Plan 2004  
\*\*Note that the LESD (2021) increased the capacity to 18,000 new jobs

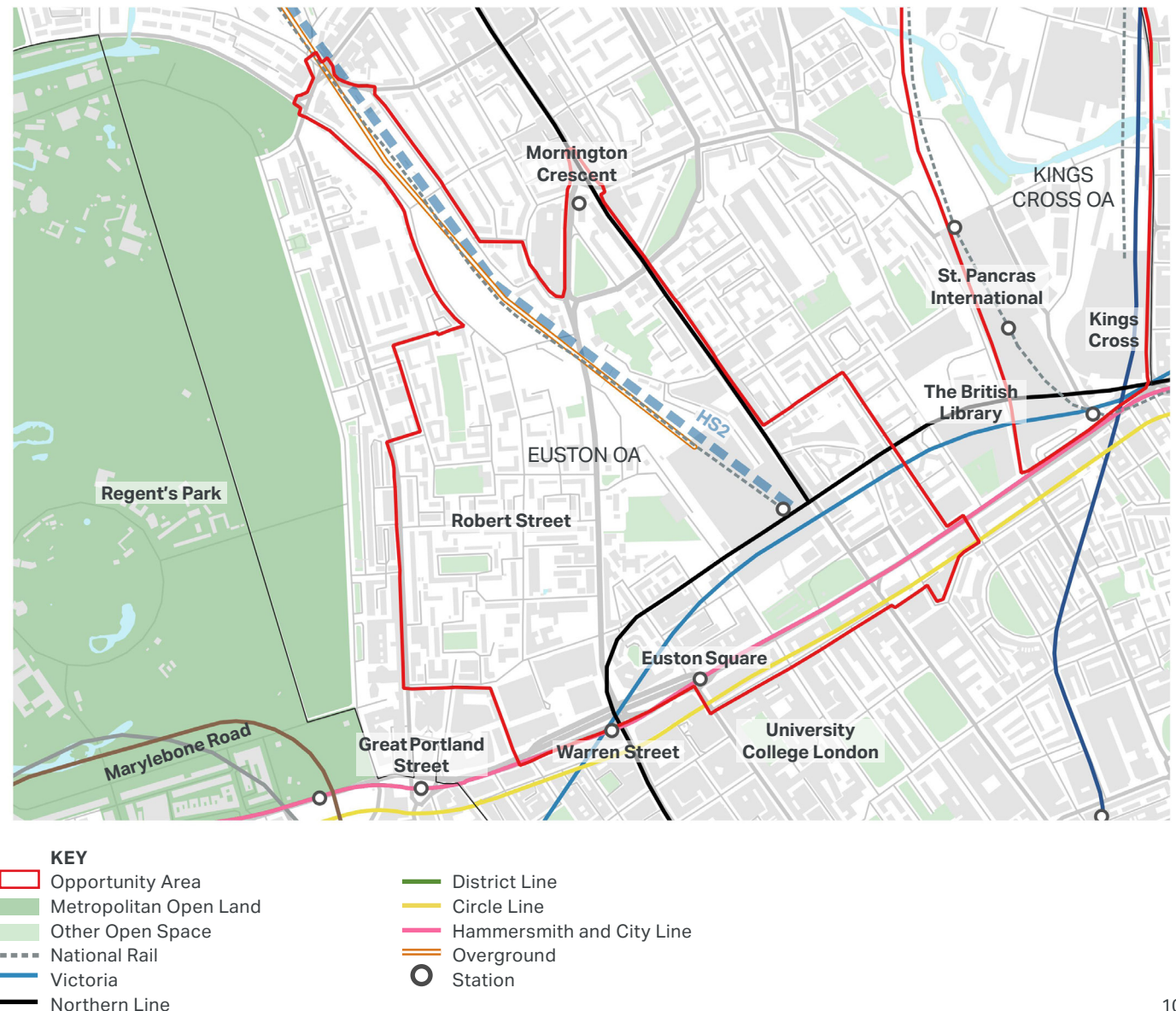




# Euston

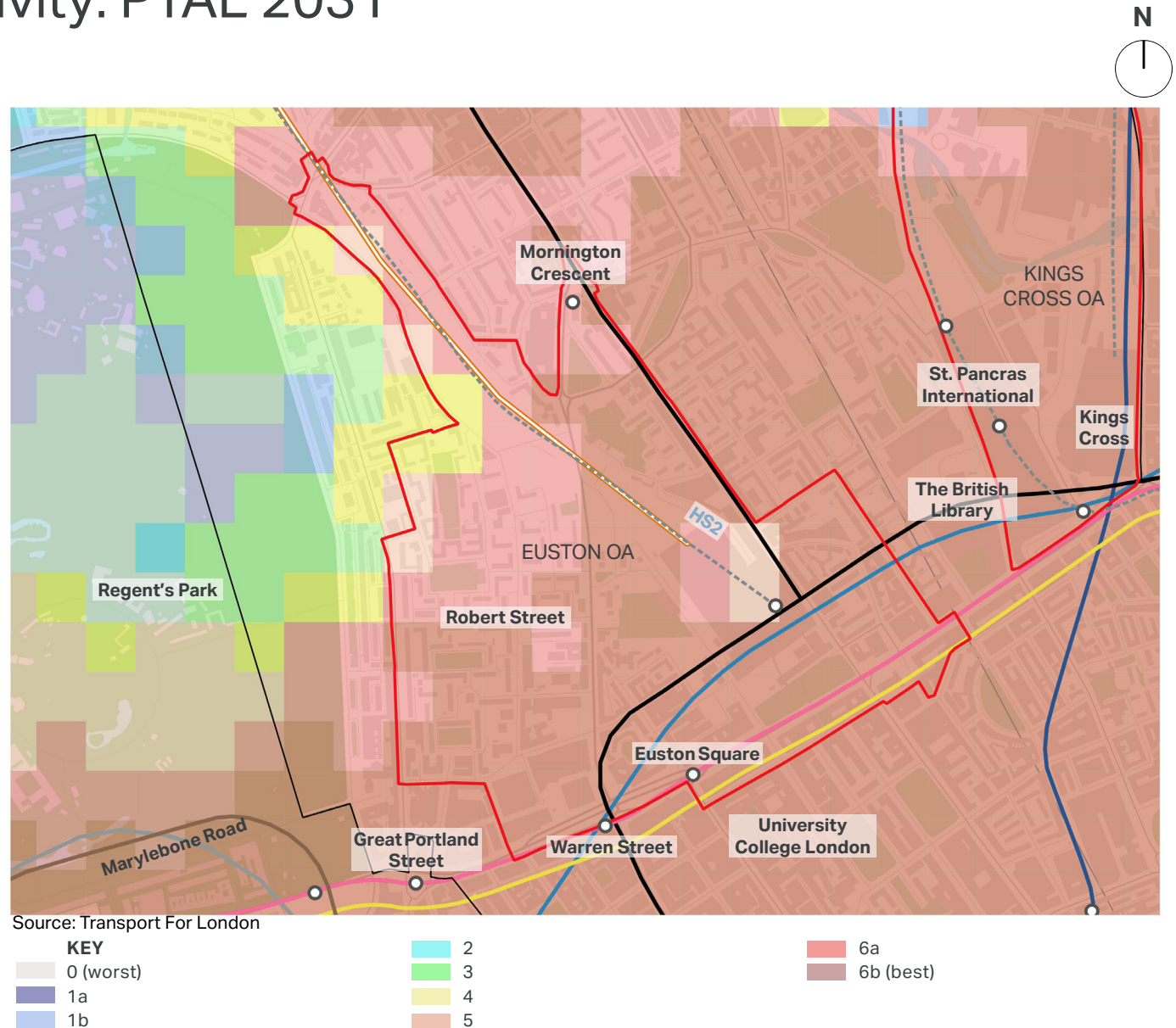
## Transport and connectivity

- The delivery of **High Speed 2 (HS2)** and **improvements to London Underground and National Rail stations** at Euston is key for the development of the OA.
- **The government announced that HS2 trains will run to Euston**, with funding provided for tunnelling to the central London terminus, catalysing private investment into the station and local area.
- Camden Council commissioned independent economic experts to assess the potential economic benefits of regeneration of Euston Station - [report published in 2024](#).
- There is a transport strategy prepared as part of the Euston Area Plan review.
- A long-held aspiration of the EAP is to **reduce the impact of buses and taxi facilities** on the Historic Euston Square Gardens which is a protected London Square, and to **improve the public realm for people walking and cycling**. This should be done in parallel to TfL operational considerations.



# Euston

## Transport and connectivity: PTAL 2031

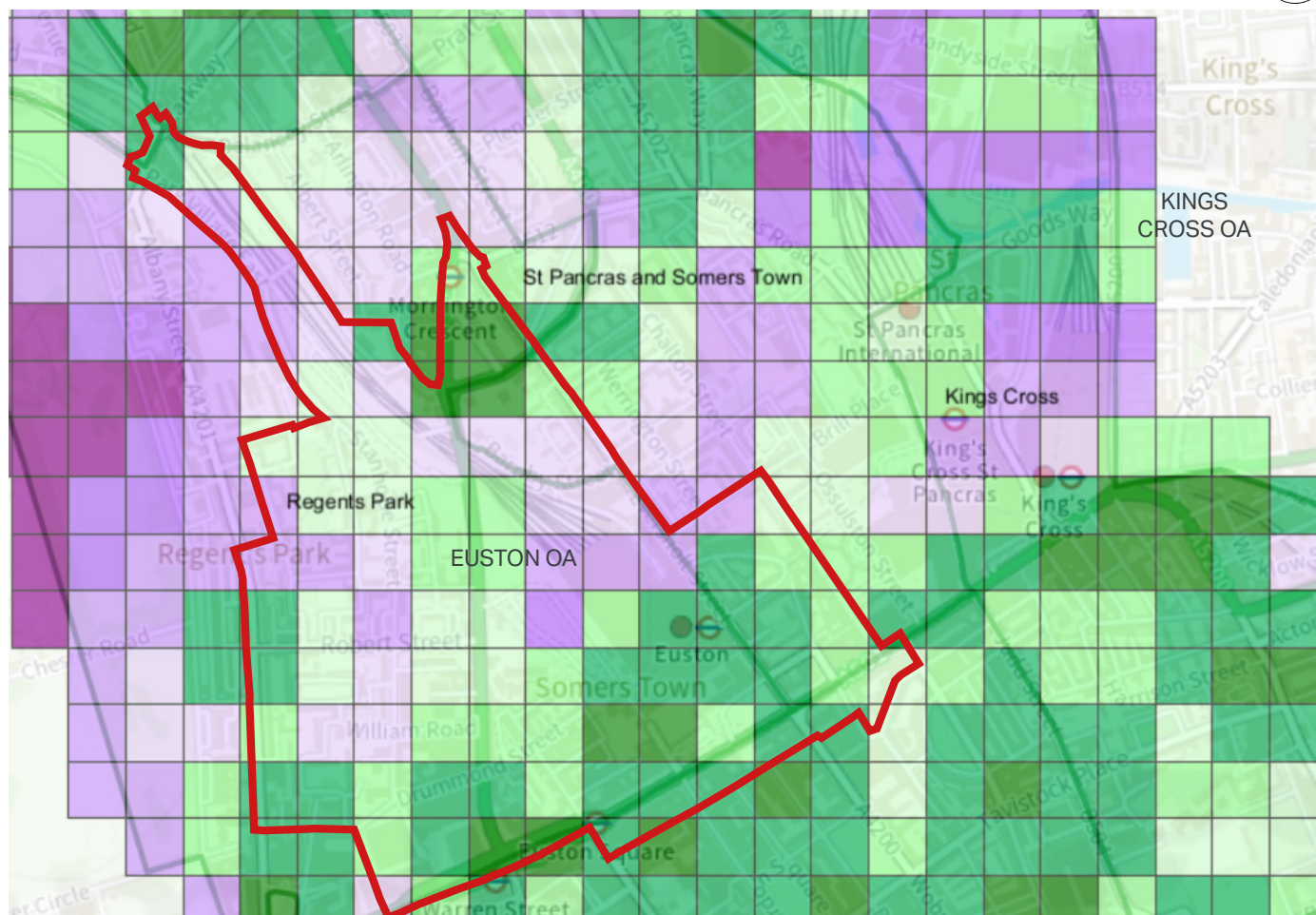




# Euston

## Transport and connectivity: STAL

- LB Camden have developed a Shared Transport Accessibility Level (STAL) analysis which highlights the relative provision of shared transport provision such as dockless e-bikes, scooters, car clubs and shared cargo bikes across Camden.
- The level of provision is scored from 0/1 (very low) to 6b(best) in the same way as TfL PTAL.
- Current and target STAL for each area is used by the borough (alongside stakeholder feedback, capacity constraints and so on) to help guide investment decisions, and securing contributions (i.e S106) towards the provision of additional shared/micro-mobility options in each part of the Borough in the [new 3-year plan from 2025/26 to 2027/28](#).



Source: Camden Council

### KEY

- 0 (worst)
- 1a
- 1b

- 2
- 3
- 4
- 5

6a

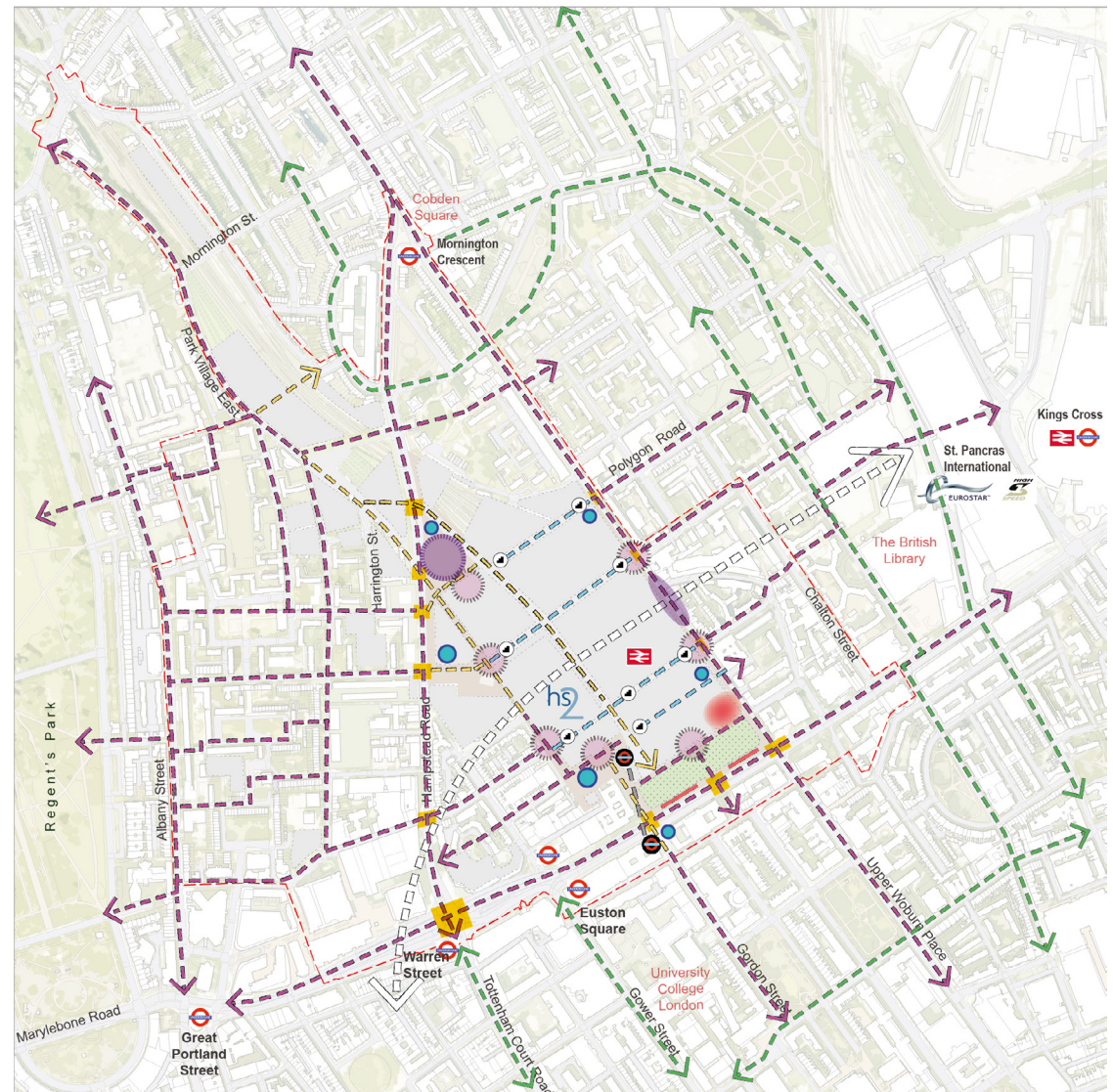


# Euston

## Transport and connectivity: Euston transport strategy (Draft EAP Update, 2023)

- The proposed updates to the Euston Transport Strategy seek to:
  - Deliver a **sustainable transport system and streets** that are accessible and inclusive for all
  - Respond to concerns about poor air quality and dominance of vehicles, supporting the majority of journeys within the EAP area to be made by walking, cycling and public transport
  - **Introduce the Euston Healthy Streets scheme** which is central to delivering the visions for Euston Road, Hampstead Road and Eversholt Street and reducing the barrier effect of the main roads
  - Achieve **balance between new bus facilities and improved facilities** for, and safety of, pedestrians and cyclists (ensuring that) bus facilities do not encroach upon Euston Square Gardens
  - Reduce the impact of taxis and PHVs on the local highway network.

Source: [Euston Area Plan consultation draft - Jan 2023](#)



- Enhanced existing walking and cycling links
- New walking routes through or over station
- New walking and cycling only links
- New London Underground walking link
- Existing cycling links
- New or improved crossings
- Indicative alignment of Crossrail 2
- Cycle parking facility

- Station entrances
- New London Underground entrances
- Locations for bus stops or stands
- Potential/indicative location for bus interchange facility
- Primary taxi and PHV rank
- Potential additional taxi and PHV drop-off for passengers with reduced mobility
- Stepped and lift access



# Euston

## Delivery of homes

### Delivery pre-2019

Completions since designation against capacity

LP 2004	200
LP 2008	1,000
LP 2016	2,800 – 3,800
Completed	305

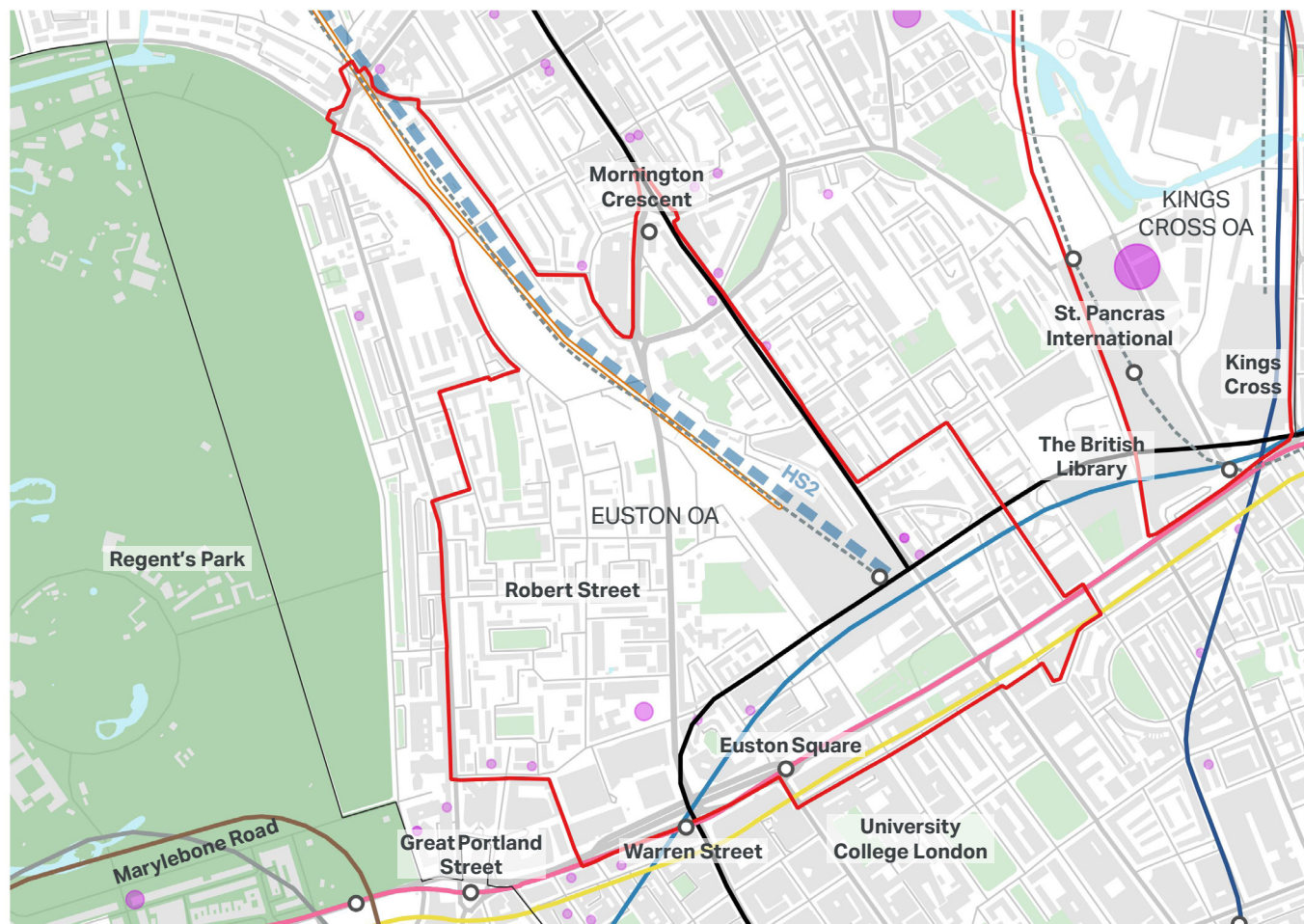
The OA delivered 305 homes between 2004 and 2018/2019.

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

Progress against 22yr, 10 yr capacity

22 yr	2,800 – 3,800
10 yr	45
Completed	58
Pipeline	66

The completions and pipeline reflect the current development status of the OA which is dependent on transport infrastructure coming forward.



**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.

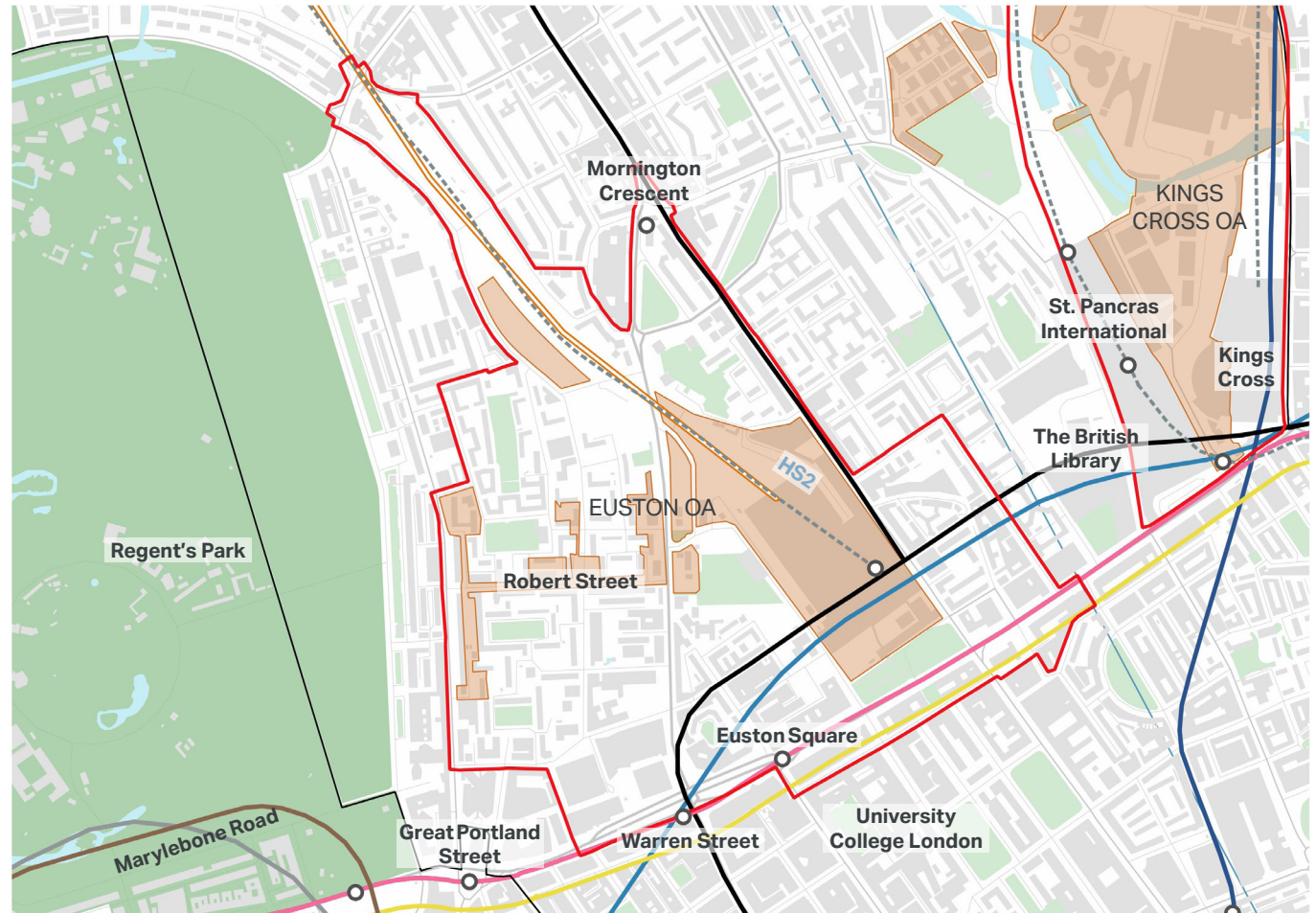
\*\* [Residential Pipeline in 2023/2024](#)

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

# Euston

## SHLAA 2017: Approvals and allocations

- Euston station is one of the key sites identified in SHLAA 2017. Potential development identified north of Robert Street, and in the HS2 Railway Cuttings.
- The no/ low approvals are related to HS2 uncertainty.



**KEY**  
□ Opportunity Area  
■ Approvals and allocations (SHLAA, 2017)

# Euston

## Site allocations: [Camden Local Plan Regulation 18 \(2024\)](#)

- Euston identified as a **key area for development** in the key diagram of the draft new Local Plan.
- **The draft new Local Plan has not considered potential development sites that sit within the Euston Area Plan boundary** as these are being taken forward as part of the review of the Euston Area Plan.
- The draft new Local Plan states that the Central Activities Zone (CAZ) and Knowledge Quarter centred on King's Cross and **Euston will continue to be the main focus for employment development** in the borough.

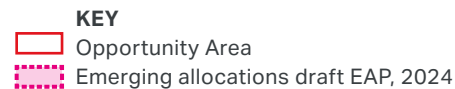
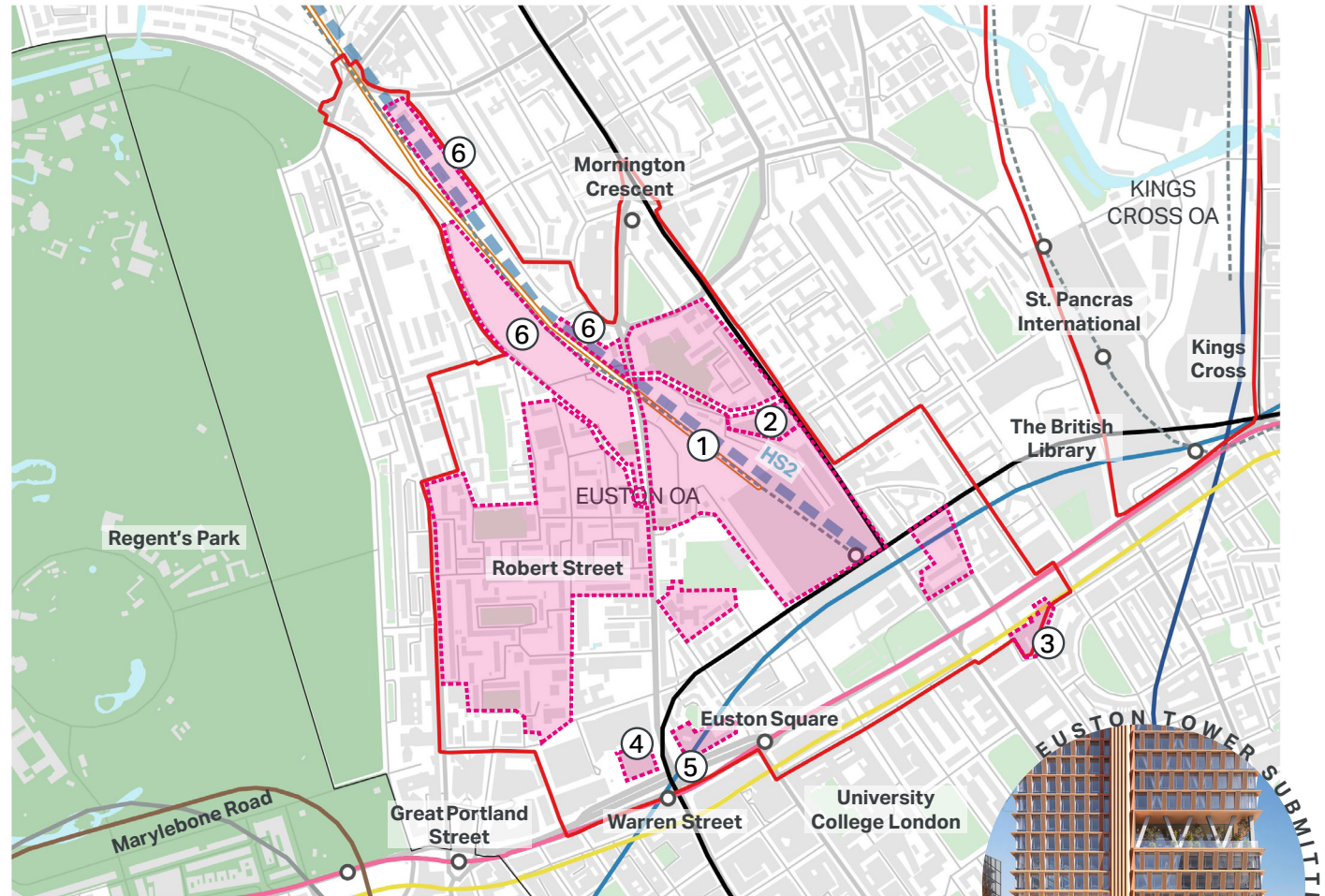




# Euston

## Emerging Site allocations: Additional EAP Consultation, draft 2024

- ① **Euston Station and tracks:** Between 250 and 900 homes and between 7,900 and 17,200 jobs (Final figures will be subject to accommodating suitable HS2 open space reprovision, station infrastructure and the extent of enabled plots).
- ② **Royal Mail Site:** Residential mixed use development, 100 homes.
- ③ **The Place:** 62 homes not including re-provision of The Place (dance school).
- ④ **Euston Tower:** Mixed-use scheme including opportunity for self-contained housing in line with current policies. Further work needed to identify capacity.
- ⑤ **Euston Circus Building:** Mixed use development including office space to support the knowledge quarter, self-contained housing and active ground floor. Further work needed to identify capacity.
- ⑥ **HS2 Railways Cutting:** 600-800 homes - subject to accommodating suitable HS2 open space reprovision and the extent of the Cutting that can be built on.



Please note that boundaries are indicative and these will be updated following responses to the consultation.  
Note all sites shown are not from Summer 2024 consultation only.

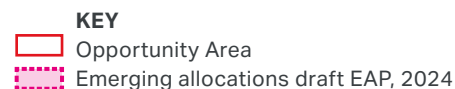
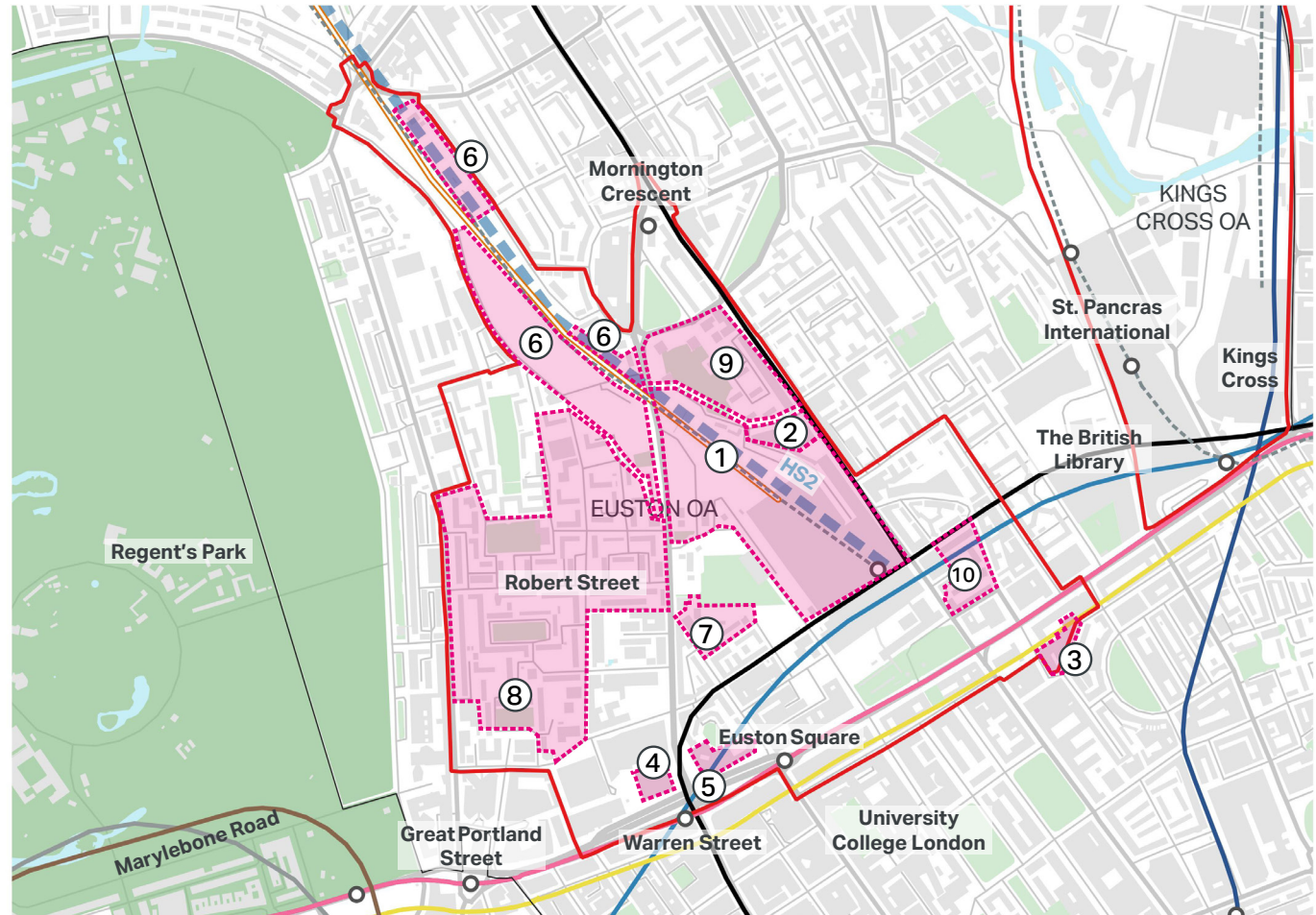


# Euston

## Emerging Site allocations: Additional EAP Consultation, draft 2024



- ⑦ **Former Maria Fidelis School:** 210 homes. Redevelopment to provide residential accommodation and retrofit of existing buildings plus open space.
- ⑧ **Regent's Park Estate:** 350 homes included in draft EAP update 2023 to north of the estate. This work is in its infancy but if further sites are identified through work with residents, they could be included in the submission draft of the EAP. There are four additional sites (Westminster Kingsway College, Surma Centre, 8-14 William Road and 17-37 William Road) within this site.
- ⑨ **Amphill Estate:** 90 additional permanent self-contained homes provided largely as infill development along the edge of the railway cutting and potentially further infill opportunities on the estate can be explored with existing residents.
- ⑩ **Churchway Estate:** As part of the Housing Delivery Group, there is the opportunity to work with communities to look at what opportunities there are for housing and what associated infrastructure would be required.

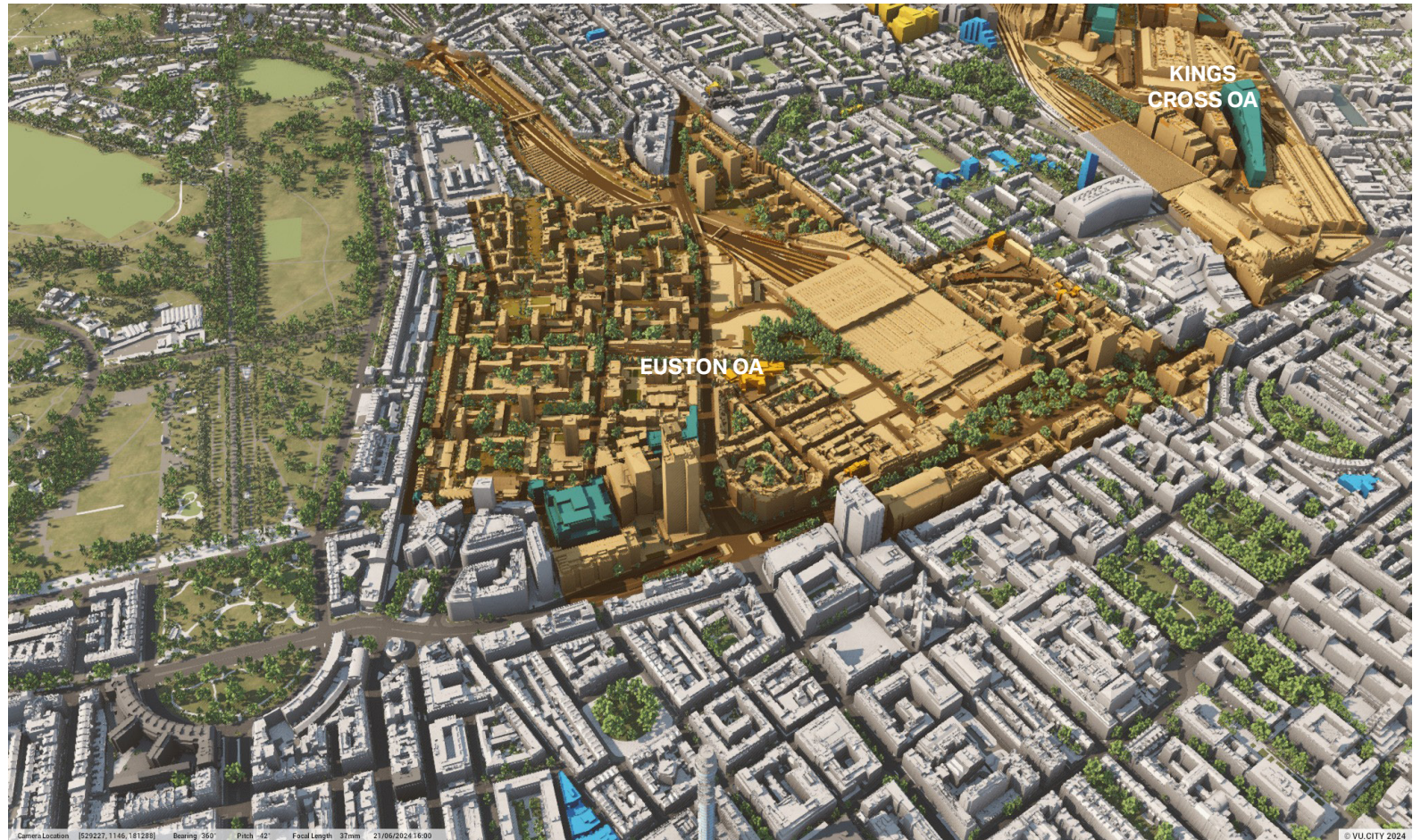


Please note that boundaries are indicative and these will be updated following responses to the consultation.  
Note all sites shown are not from Summer 2024 consultation only.



# Euston

## Development activity 2021



Source: vu.city

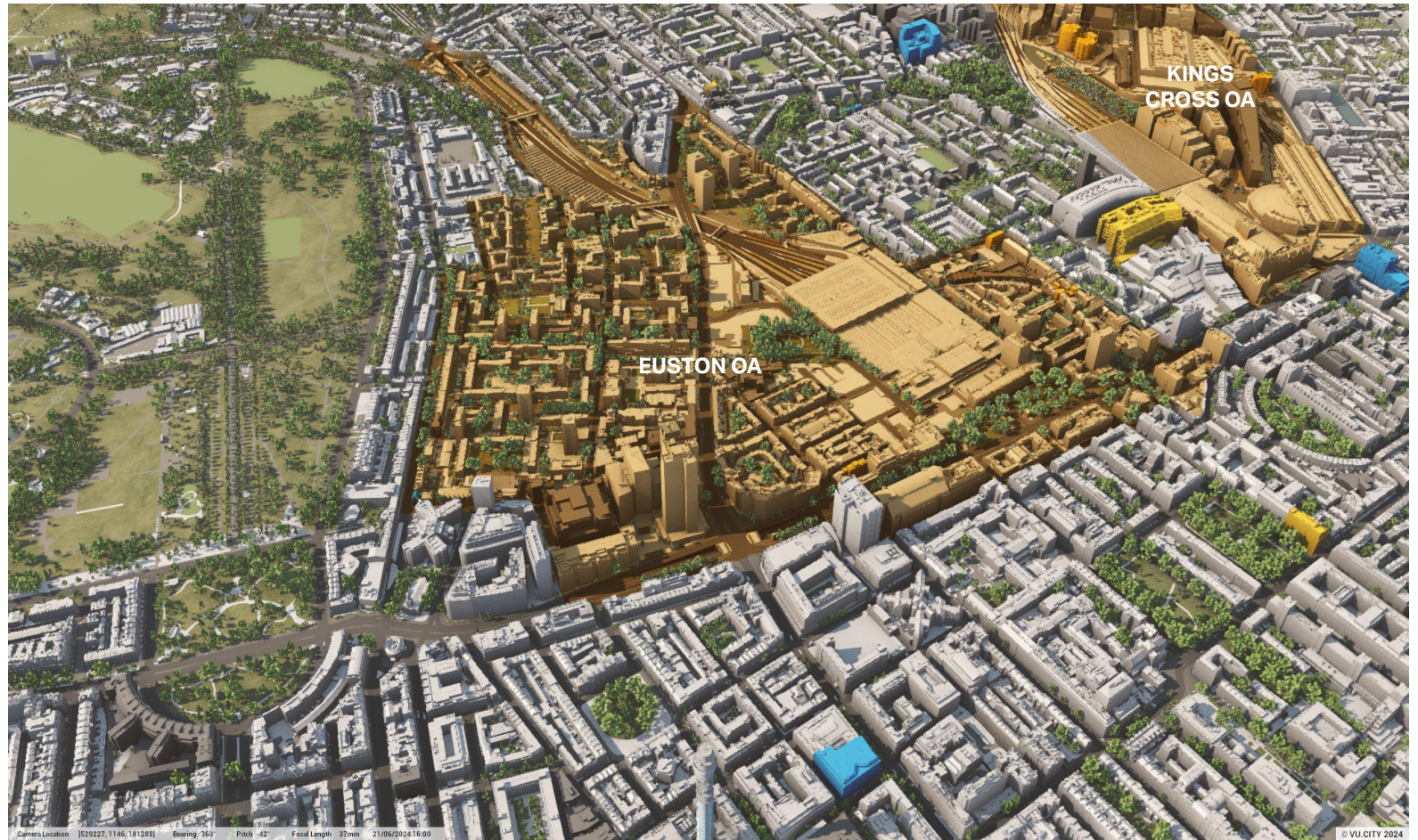
### KEY

- Consented
- Under Construction
- Completed
- Opportunity Area



# Euston

## Development activity 2024



Source: vu.city

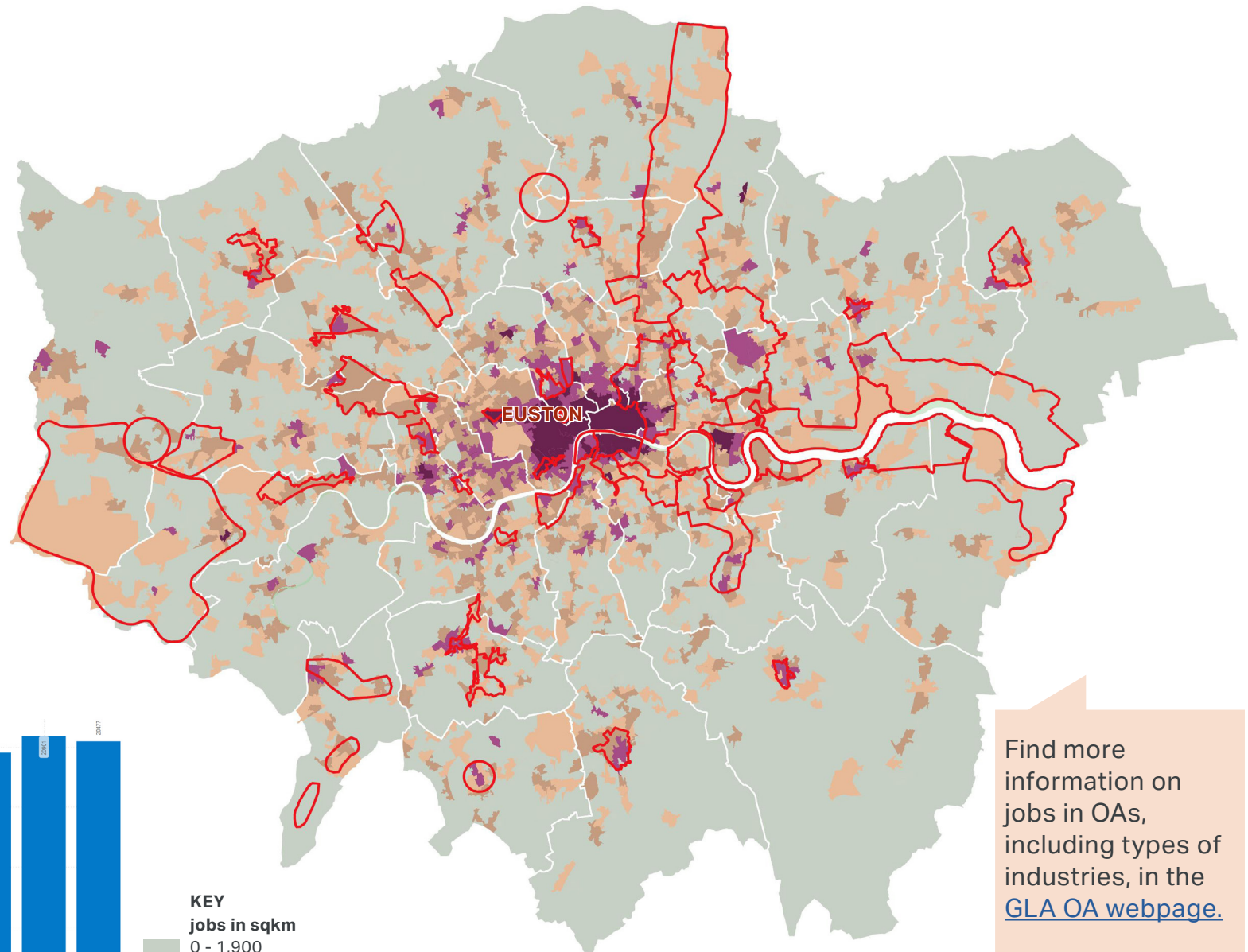
### KEY

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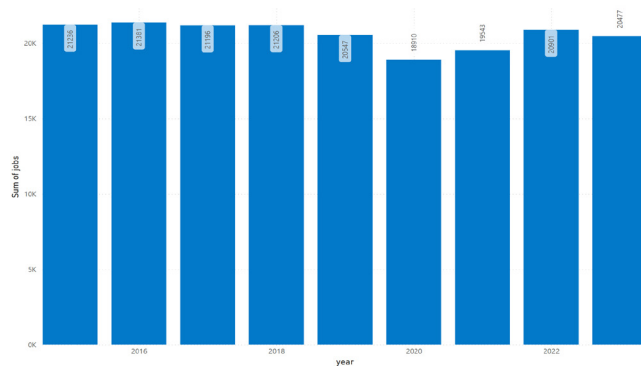


# Euston Jobs

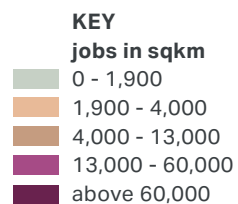
- High jobs density in Euston OA as shown in the map.
- In 2023, there were 20,417 jobs in the OA.
- 5 per cent of the jobs in Camden in 2022 and 2023 were in Euston OA.



Jobs by year in the OA



Source: Census, Business Register

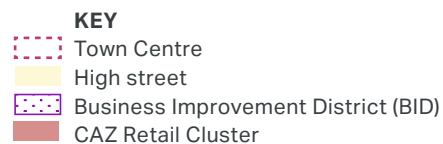
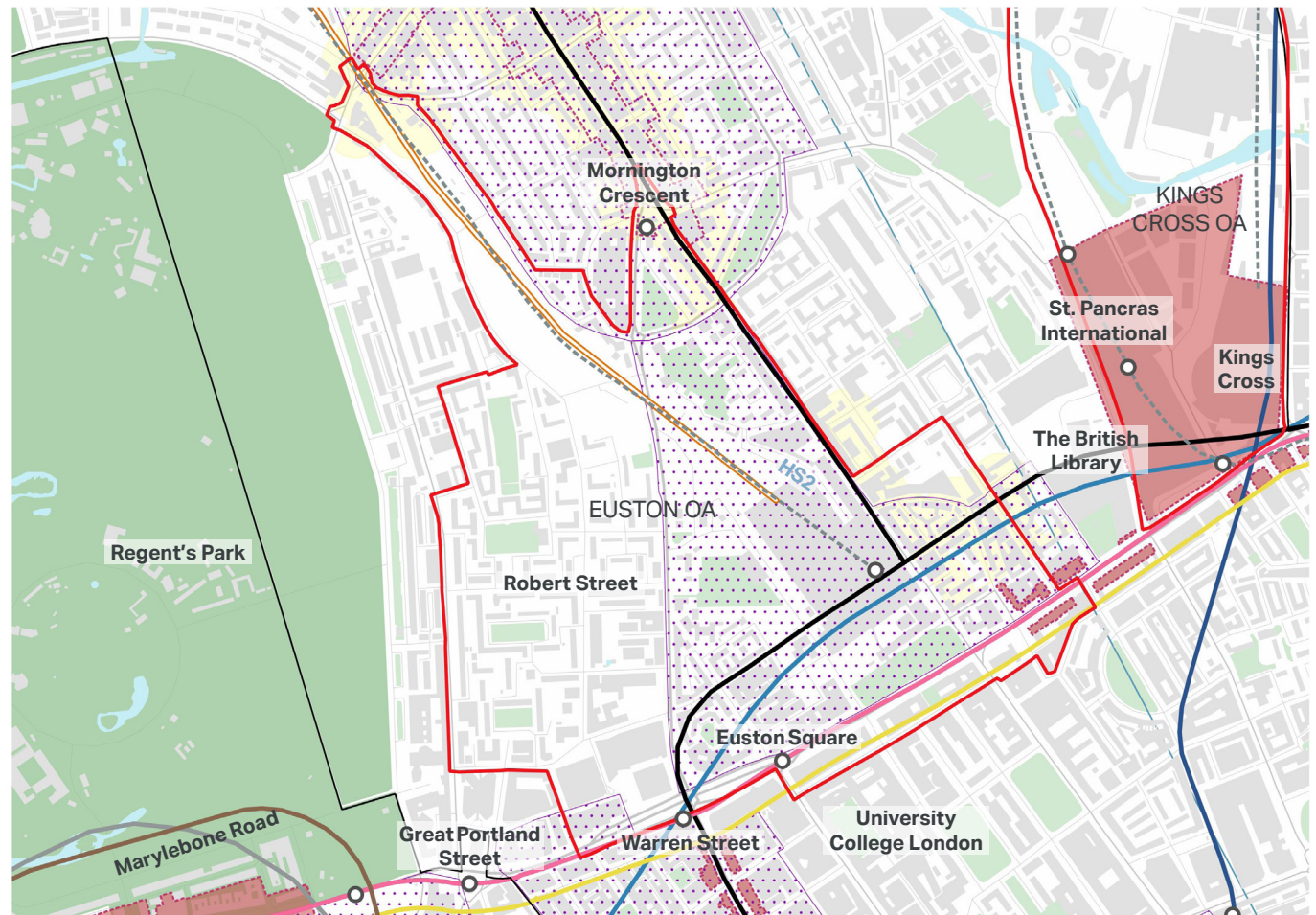


Find more information on jobs in OAs, including types of industries, in the [GLA OA webpage](#).

# Euston

## Town Centres and High Streets

- Part of the Camden Major Town Centre is in the northeast of the OA boundary and part of the Kings Cross CAZ Retail Cluster is in the southeast of the OA.
- Potential for improving East-West connections and linking to existing high streets, enabling permeability in the OA.
- Investment at Euston will be further supported through the appointment of Bek Seeley to chair the **Euston Housing Delivery Group**, to drive forward an ambitious housing and regeneration initiative for the local area.





# Euston

## Place strategies: Consultation draft EAP, 2023

- The Euston Area Plan (EAP) provides a single strategic plan to help shape change in the area around Euston Station up to 2031.
- It seeks to ensure that, if the HS2 high speed rail link goes ahead, we can secure the best possible future for the residents, businesses and visitors to Euston.
- It was prepared jointly by Camden Council, the GLA and TfL and was adopted by the Council in 2015. The adopted 2015 EAP plan period ran until 2031.
- Camden carried out an initial consultation on proposed updates to the EAP in 2023 following a partial review. The draft EAP Update 2023 revised the plan period to 2047
- The key issues and proposed strategy response remained the same, however, it was necessary to reflect the reduced availability of land and identified additional constraints, by proposing a new, lower target for the delivery of housing and jobs, while continuing to highlight the need for improved links through and across the station, new and replacement open space and the need to integrate the stations and development with the surrounding communities.





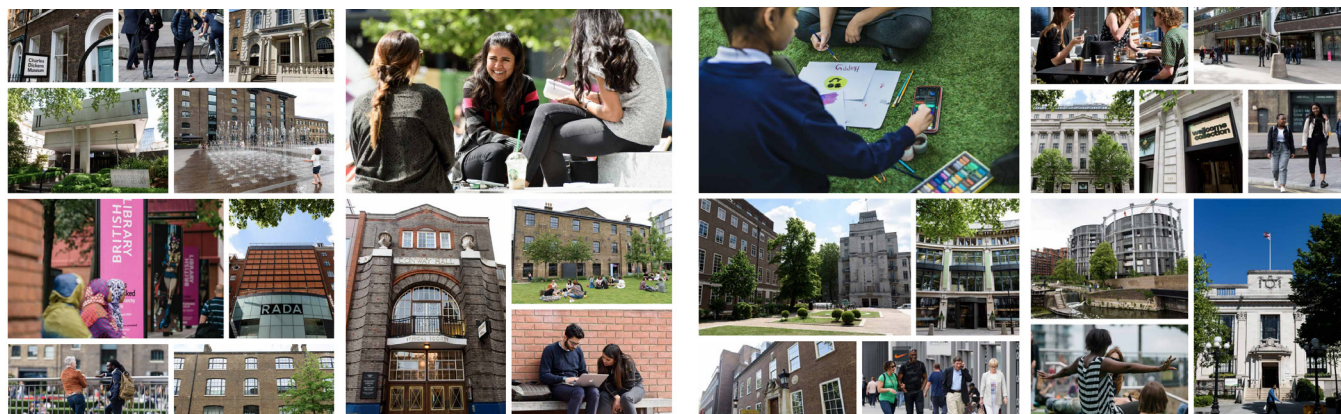




# Euston

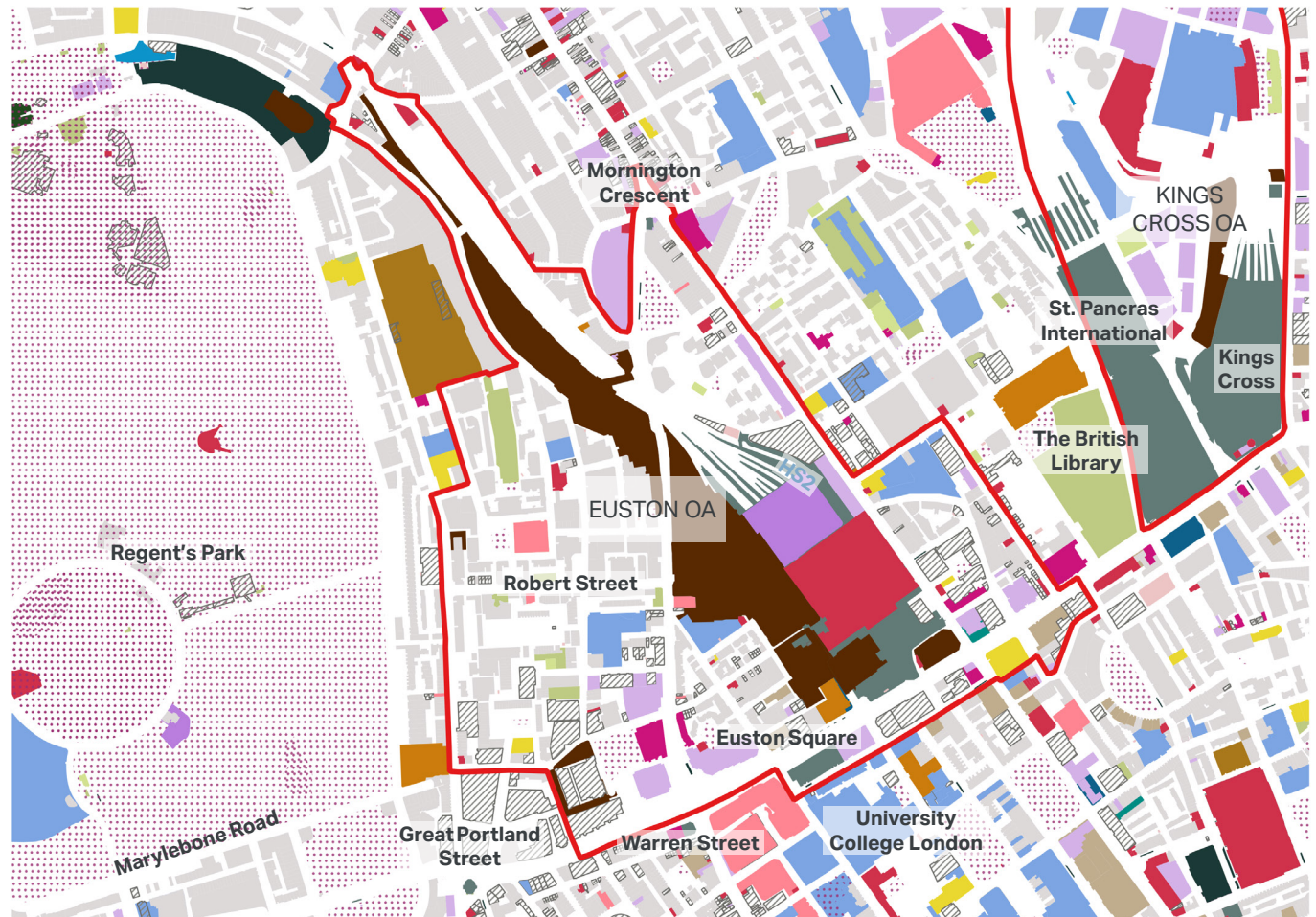
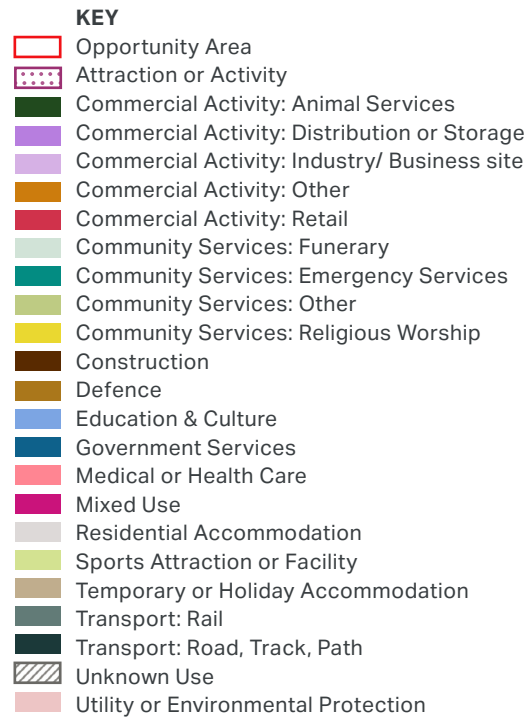
## Place strategies: Knowledge Quarter Innovation District

- Euston OA includes a committed residential community and a world leading innovation district identified in the [London Growth Plan](#) - the Knowledge Quarter (KQ) Innovation district.
- KQ is the location of major data science and life science businesses.
- Policies in the [draft Camden Local Plan \(April 2025\)](#) identify KQ as a main focus for employment in Camden:
- Major proposals for additional employment, research and/or learning floorspace within this area will be required to contribute to reducing inequalities and increasing life chances in local residential communities by maximising community benefit at the planning, construction and end-user phases, including supporting increased access to jobs, skills training and educational opportunities.
- The Knowledge Quarter is a partnership of 35 organisations established in 2014, set to work on building a world-class knowledge and business hub for the 21st Century. 14 higher education institutions produce 30,000 graduates each year.



# Euston

## Land uses



Source: OSNGB, City Intelligence Unit (GLA)



# Euston

## Moving forward

- OA is reliant on future station designs and confirmation of funding.
- Further work is needed to understand the extent of the HS2 station, upgrades to the existing Network Rail station and TFI infrastructure in order to determine where development is possible.
- Camden commissioned consultants to assess the potential benefits of regeneration of Euston Station.
- Future expansion of either the HS2 or Network Rail station remains a possibility should links to Manchester and the North be improved in coming decades, which would require provision for **additional space at Euston to connect through to London.**
- Knowledge Quarter proposed as one of the main focuses of employment development in Camden in the draft Local Plan, presents the opportunity for increased access to jobs, skills training and educational opportunities and reduced inequalities for the OA's local community.

### Proposition

- Retain OA as a 'Ready to Grow'.
- The OA is a Place Unit priority; working collaboratively with stakeholders in the Euston Area.
- Central Government considering appropriate delivery vehicle.
- There is a need for improved links through and across the station, new and replacement open space and the need to integrate the stations and development with the surrounding communities.



Source: HS2