

Opportunity Area Portrait

Elephant & Castle



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.

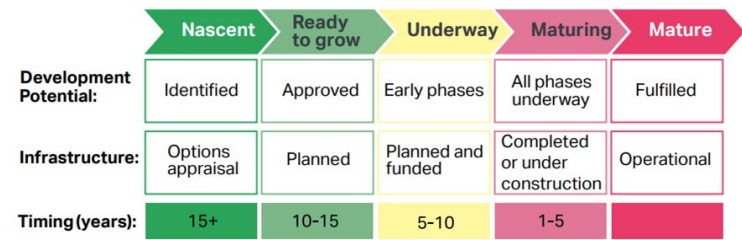
OA boundaries

- 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
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Town Centre
and High
Streets

Industrial
Land

Place
strategies*

Moving
forward

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

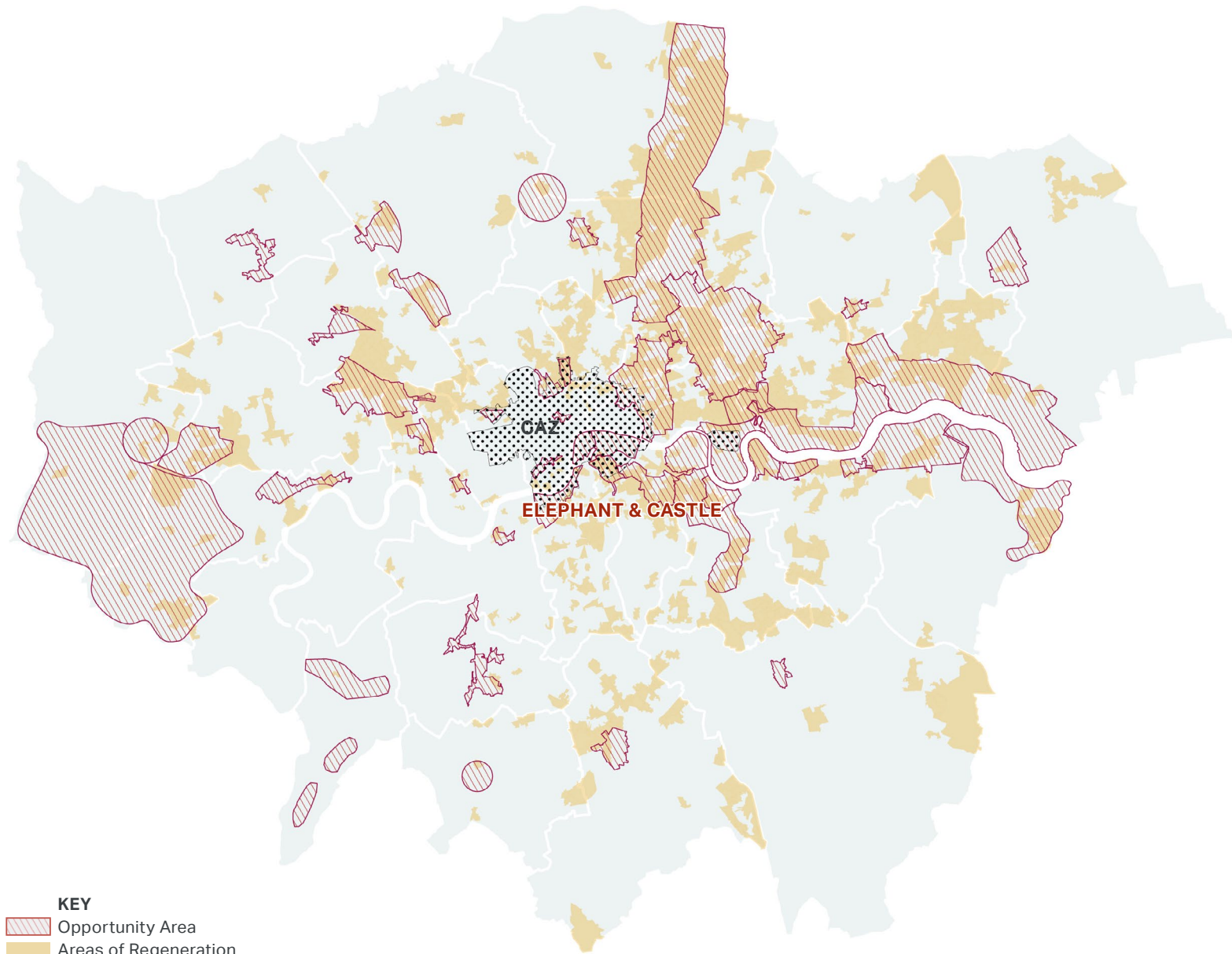
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OAs in the CAZ

- 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)

Areas of Regeneration

The OA overlaps with the CAZ, areas of regeneration and has an adopted boundary.

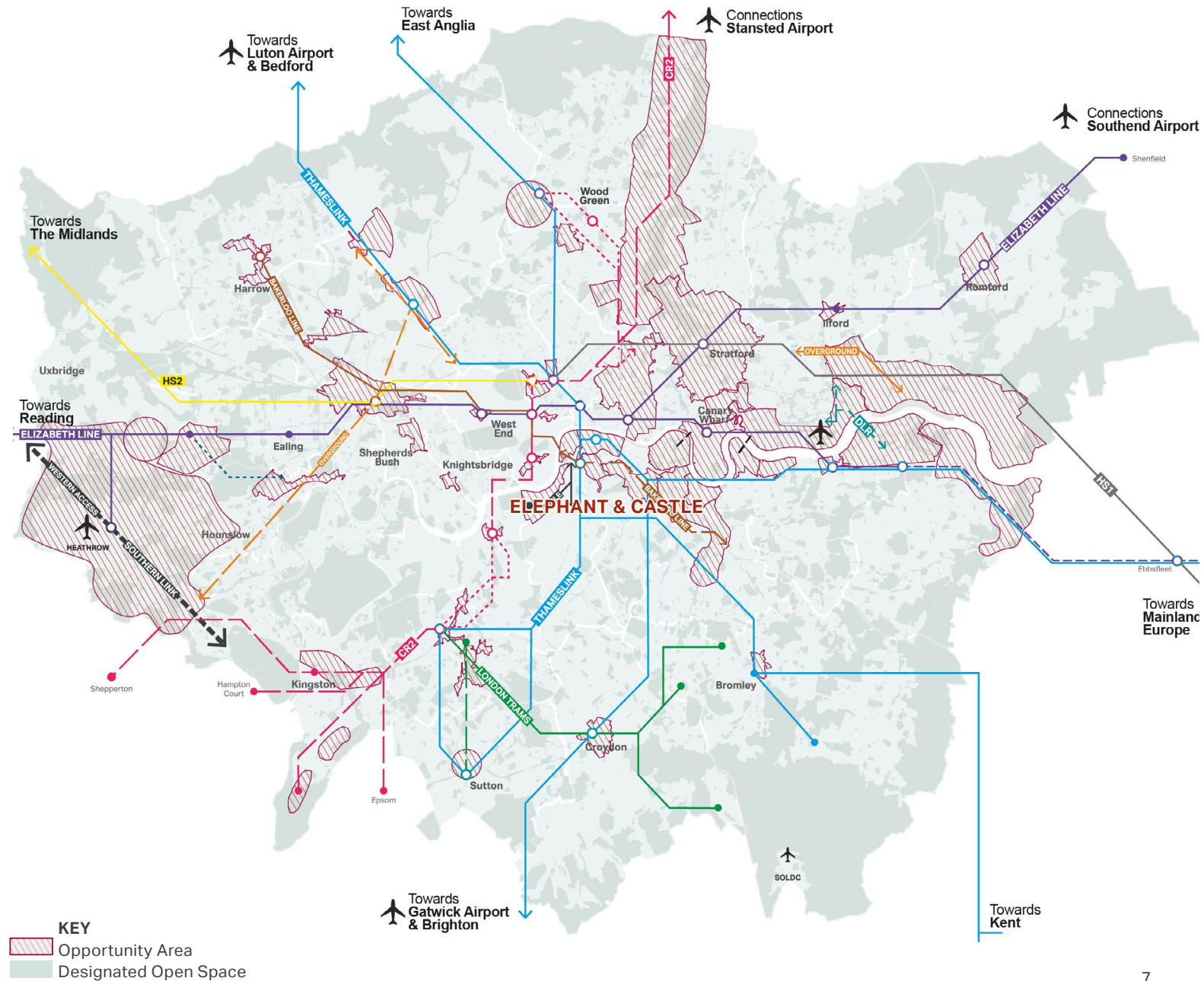


Source: Areas of Regeneration as per London Plan 2021

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Transport and Growth Corridors

- Very well connected OA
- Served by the underground - Bakerloo Line upgrade and extension to enhance the OA's connectivity to north and southeast London.
- Thameslink service currently connects the OA northwards towards Luton Airport, Bedford and East Anglia and southwards to Gatwick Airport, Brighton and Kent.

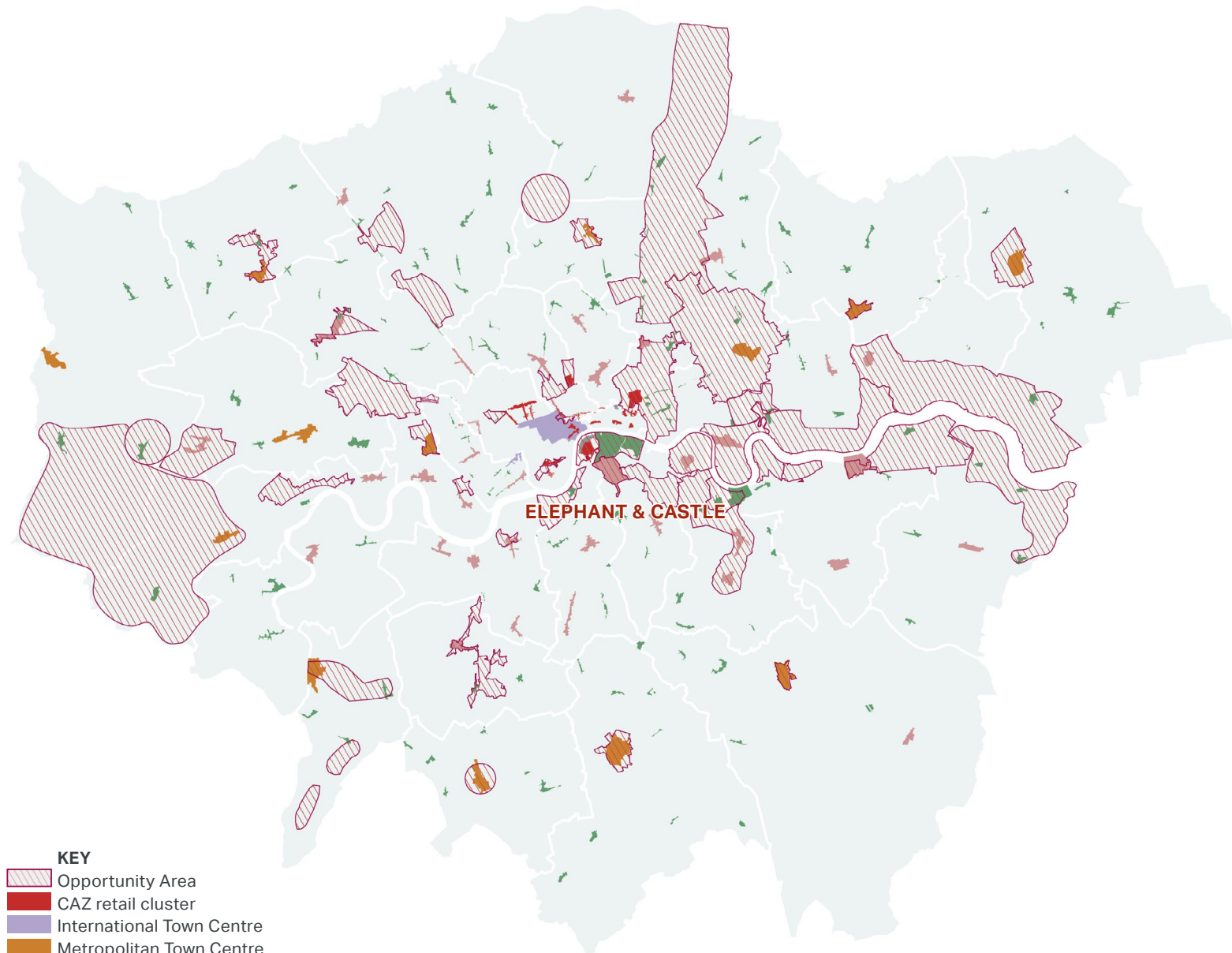


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OAs and Metropolitan Town Centres

- 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 Major Town Centre in the London Plan and Southwark Plan 2022.



KEY

- Opportunity Area
- CAZ retail cluster
- International Town Centre
- Metropolitan Town Centre
- Major Town Centre
- District Town Centre

Source: Planning Data Map

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Key info

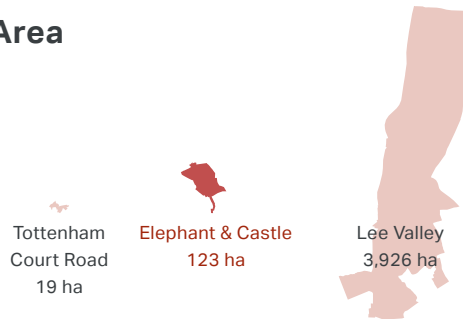
London Plan Designation Year

2004 2008 2011 2016 2021

Borough

LB Southwark

Area



OA specific plans

Elephant & Castle OAPF (2012)
Elephant & Castle SPD (2012)

Local Plan status

Adopted in 2022

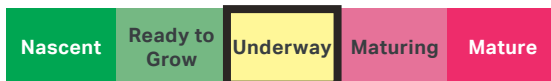
Growth Corridor

Central London

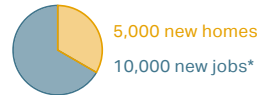
Housing Delivery Test 2023

Buffer

OA status (London Plan 2021)



London Plan 2021 capacities by 2041



Source: Google Earth

KEY
Opportunity Area

*Note that the LESD (2021) decreased the capacity to 7,100 new jobs

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Transport and connectivity

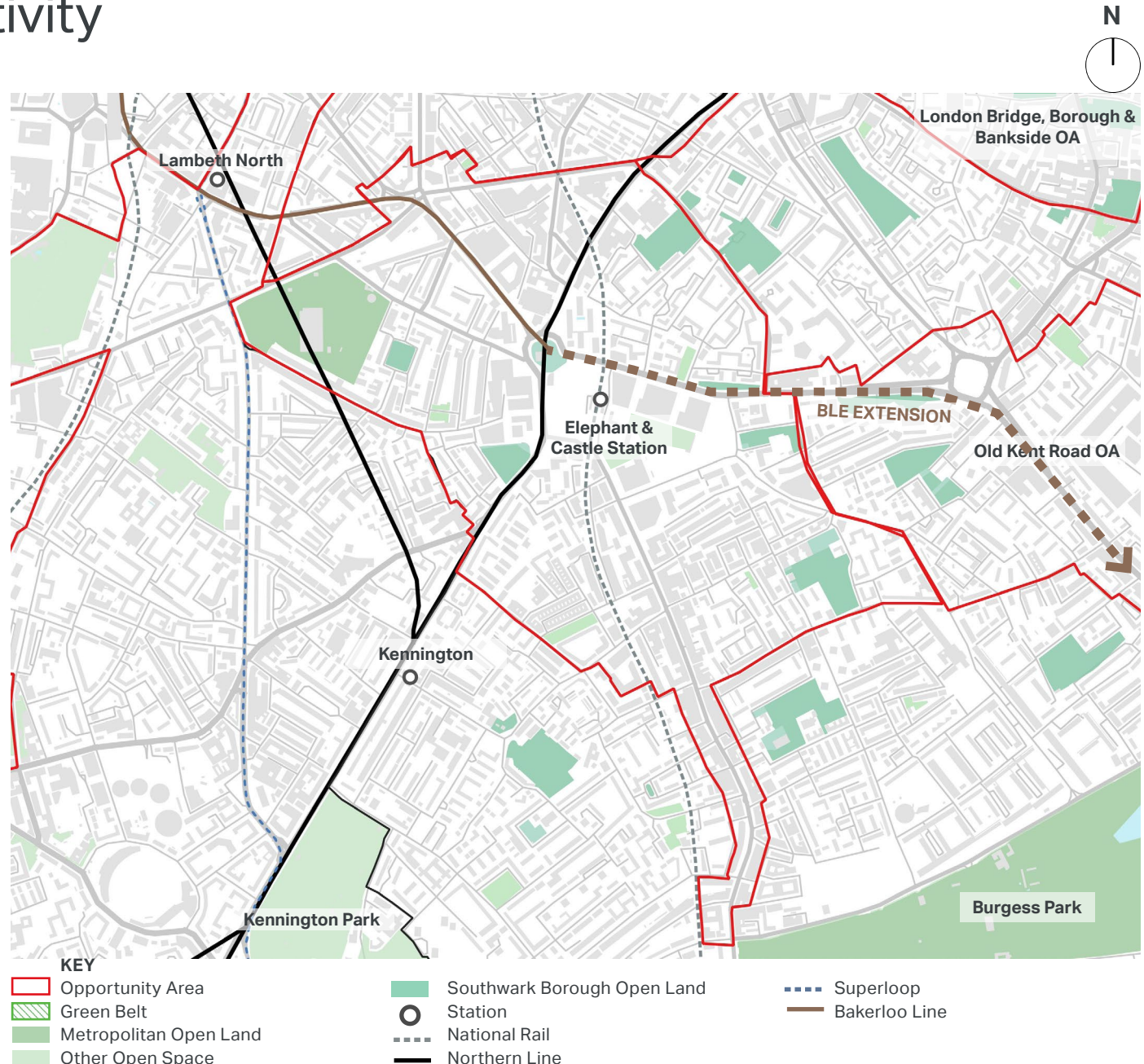
- TfL identified that transport is not holding development back in any sites.

Bakerloo line extension

- The Bakerloo line upgrade and revamping of relevant stations in relation to the extension is a key transport intervention in the OA. The upgrade is currently unfunded.

Bakerloop

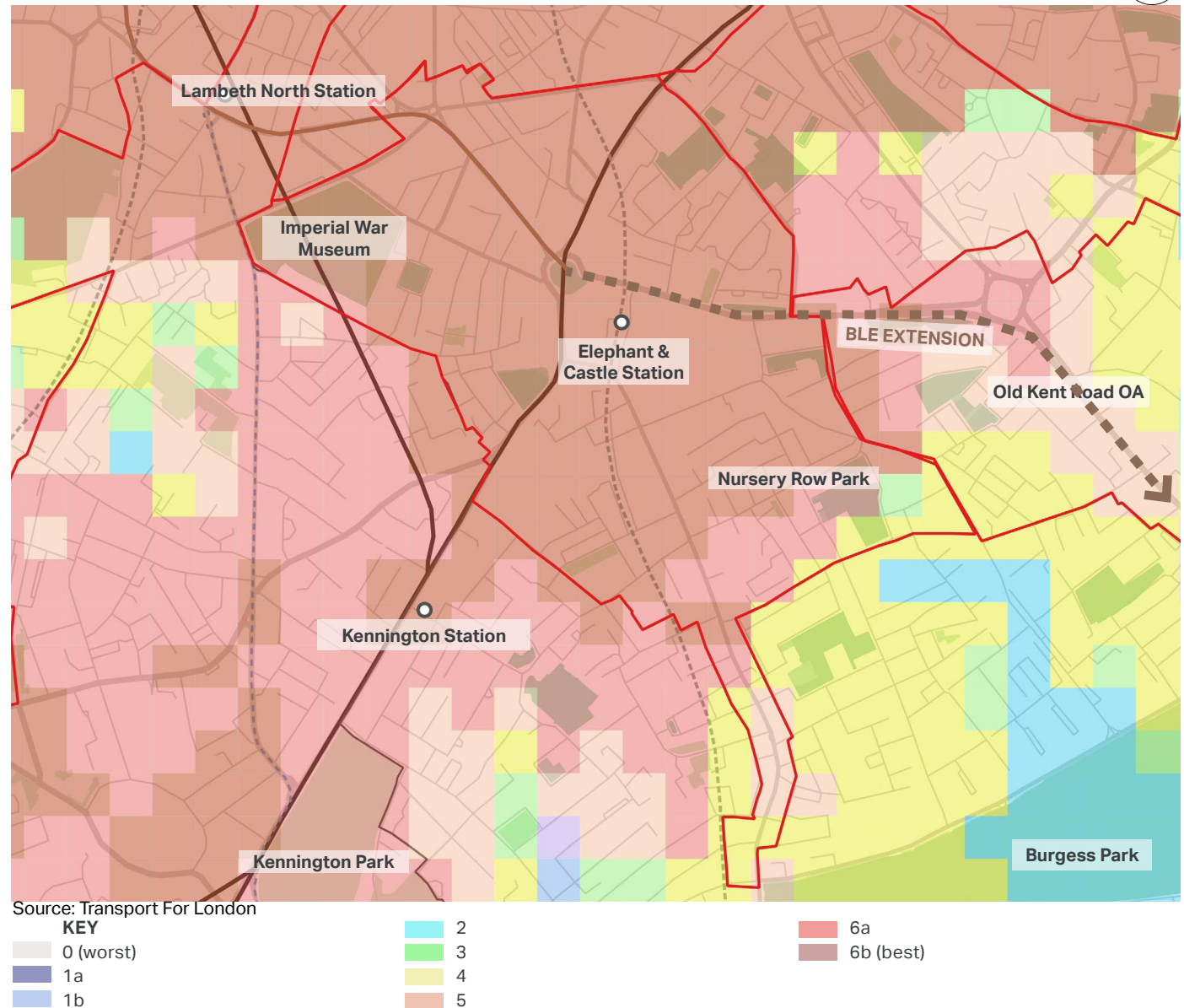
- TfL is consulting [on the BL1 – Proposed express bus route](#) between Waterloo and Lewisham town centre.
- In line with what is proposed for a future Bakerloo line extension, the BL1 Bakerloop would start and stop at Waterloo, via the following key transport interchanges and town centres: Waterloo, Elephant & Castle, Burgess Park (Dunton Road), Old Kent Road (Ilderton Road), New Cross Gate, Lewisham station and town centre.
- Cycleway 4 opened in March 2024. (route between Tower Bridge and Greenwich).
- Good connection to other neighbouring OAs.



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Transport and connectivity: PTAL 2031

- In 2031, the entire OA is forecast to have high public transport accessibility levels (PTAL) of either 6a or 6b which is the highest rating.
- Only TfL's committed and funded public transport network schemes are considered in this scenario.

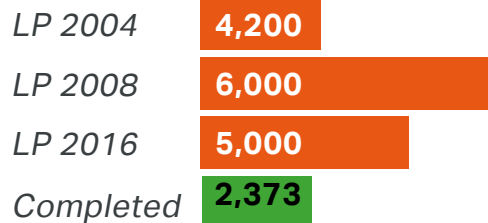


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Delivery of homes

Delivery pre-2019

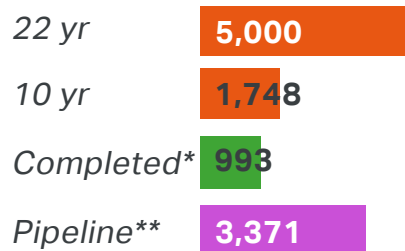
Completions since designation against capacity



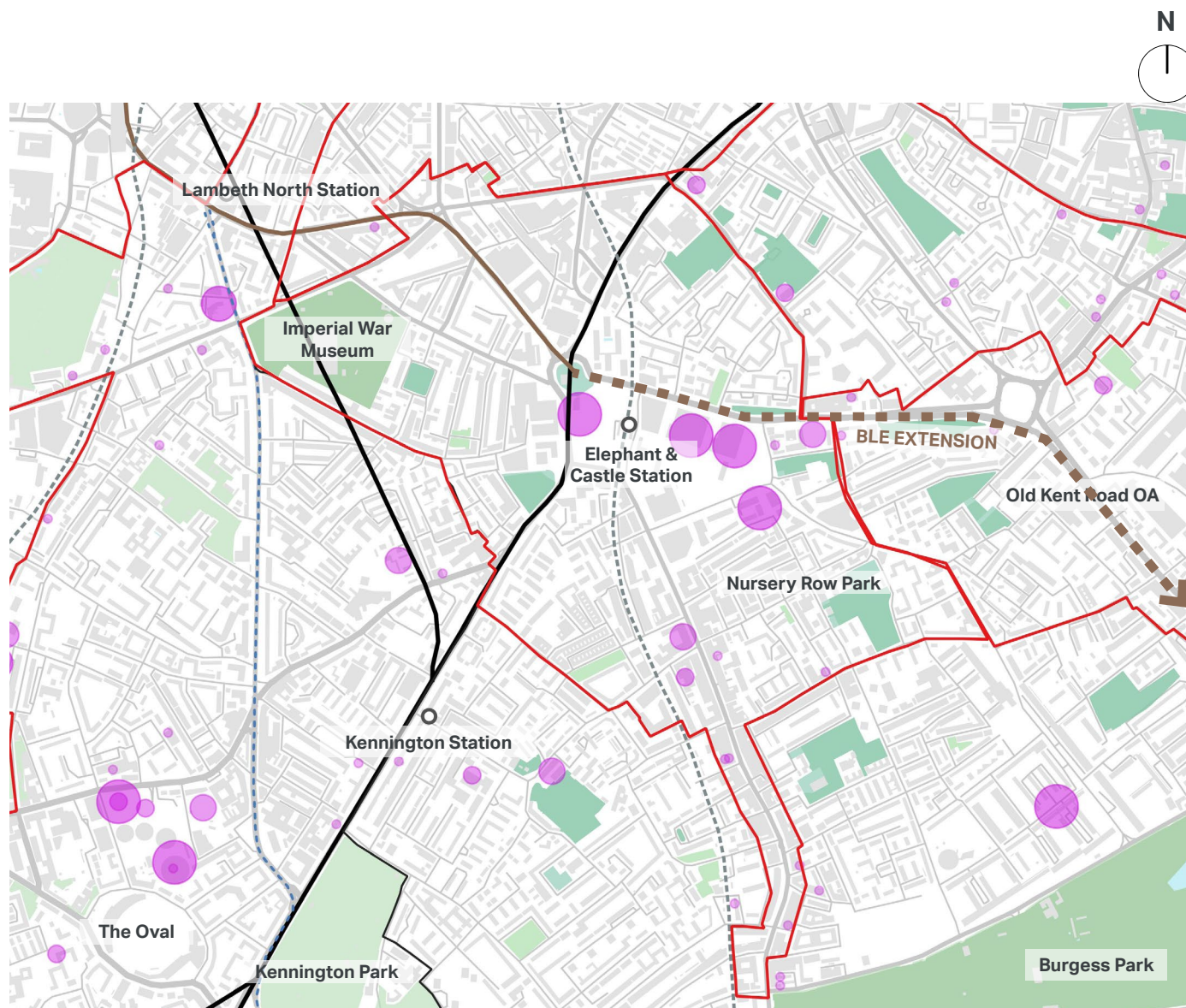
By 2019, the OA delivered 57 per cent of the indicative capacity for new homes set in London Plan 2004 and 47 per cent of the 2016 indicative capacity.

Delivery post - 2019 (London Plan 2021)

Progress against 22yr, 10 yr capacity



Considering the completions and pipeline, the OA is meeting 87 per cent of its 22 year capacity. Current completions alone in the OA account for only 20 per cent of the London Plan 22 year capacity and 57 per cent of the 10 year capacity.



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](#)

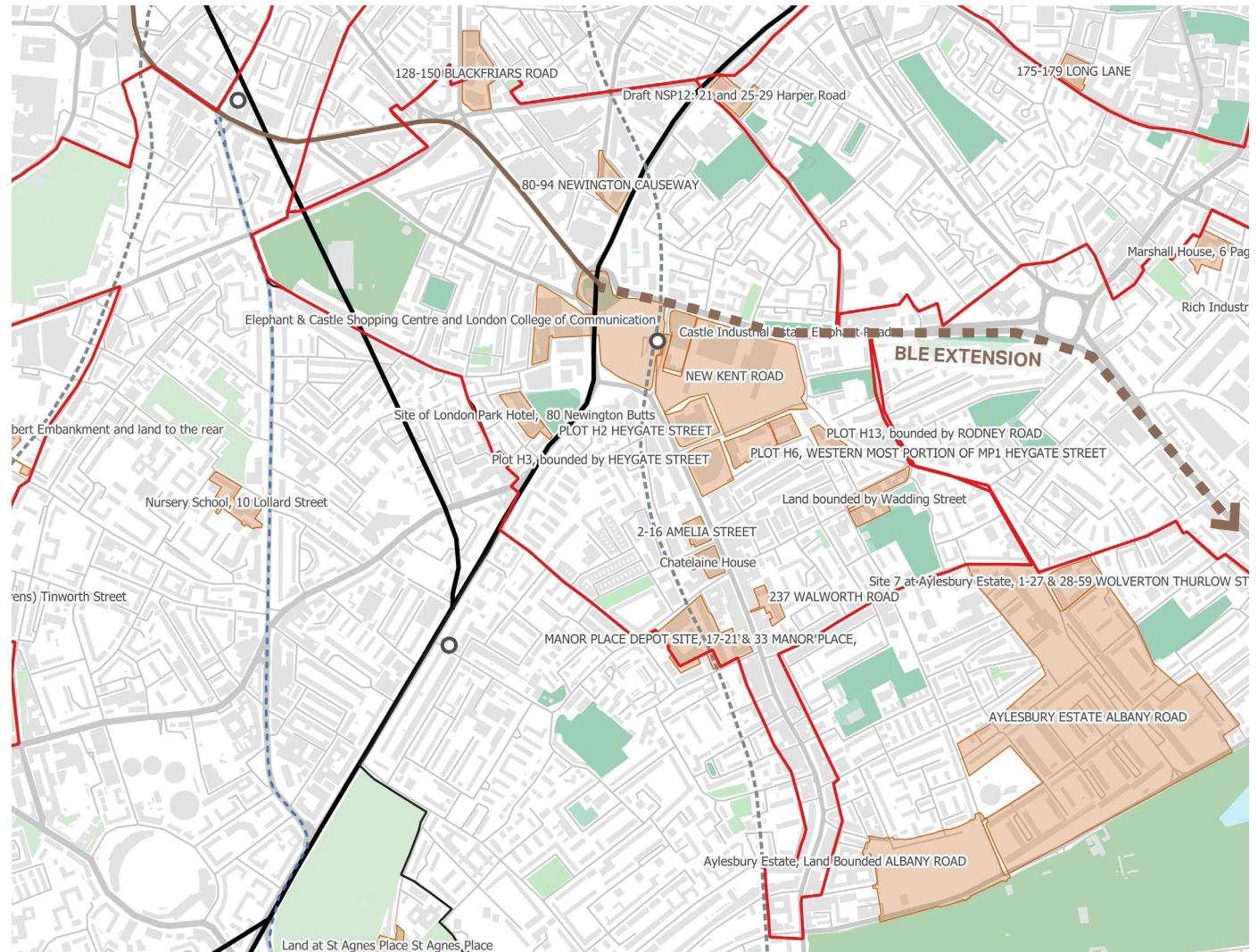
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SHLAA 2017: Approvals and allocations

- ① **Elephant & Castle Town Centre (Shopping Centre)** - Approved in 2019, 983 homes (incl. 337 affordable), under construction
- ② **Elephant Park:** 2,005 homes delivered. 683 more homes under construction. Estimated completion in 2028.
- ③ **Manor Place Depot:** Approved in 2019, 270 homes delivered.



Elephant & Castle Town Centre (Shopping Centre)

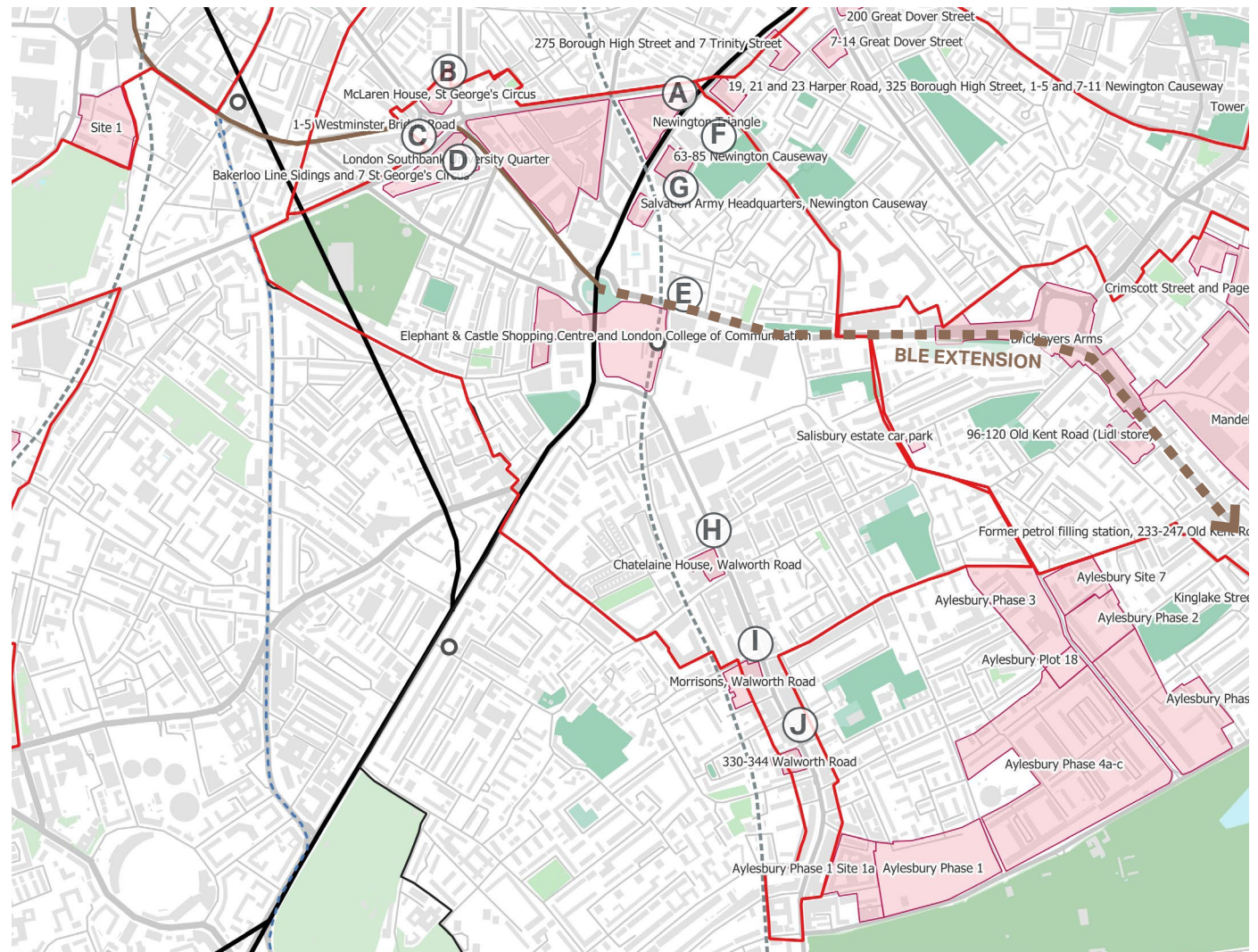


- KEY**
- Opportunity Area
 - Approvals and Allocations (SHLAA, 2017)

Elephant & Castle

Site Allocations: Southwark Local Plan (2022)

- (A) NSP 44 (Newington Triangle):**
Located in the CAZ. Minimum 438 homes indicative capacity.
- (B) NSP 21:** 433 homes approved.
- (C) NSP 50:** 21 homes indicative capacity.
- (D) NSP 45:** 100 homes indicative capacity.
- (E) NSP 48:** 983 homes under construction - indicative capacity met.
- (F) NSP 46:** 93 homes indicative capacity. Site has full planning permission
- (G) NSP 47:** 57 homes indicative capacity.
- (H) NSP 85:** 23 homes approved, 54 homes indicative capacity.
- (I) NSP 83:** 129 homes indicative capacity.
- (J) NSP 84:** 46 homes indicative capacity.



KEY
 Site allocation - LB Southwark

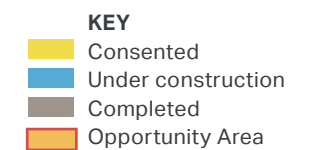
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Development activity 2021

- Emerging developments in the centre of the OA.



Source: vu.city



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Development activity 2024

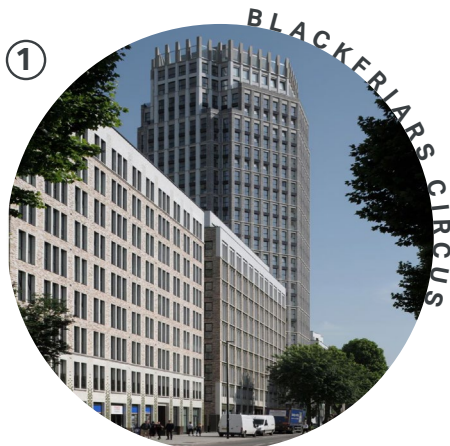


Source: vu.city

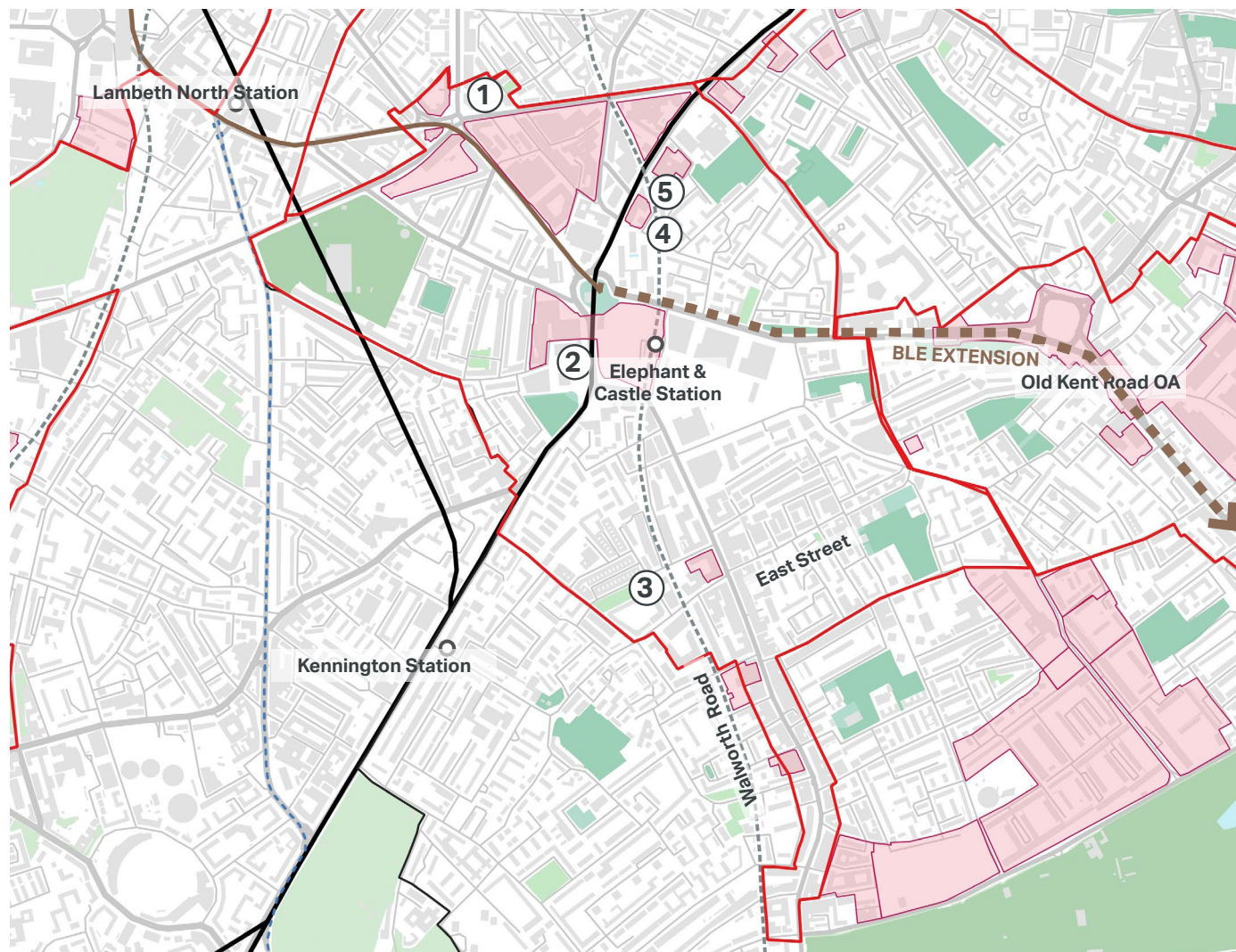
- KEY**
- Consented
 - Under construction
 - Completed
 - Opportunity Area

Elephant & Castle

Development activity: Approvals (non-site allocations)



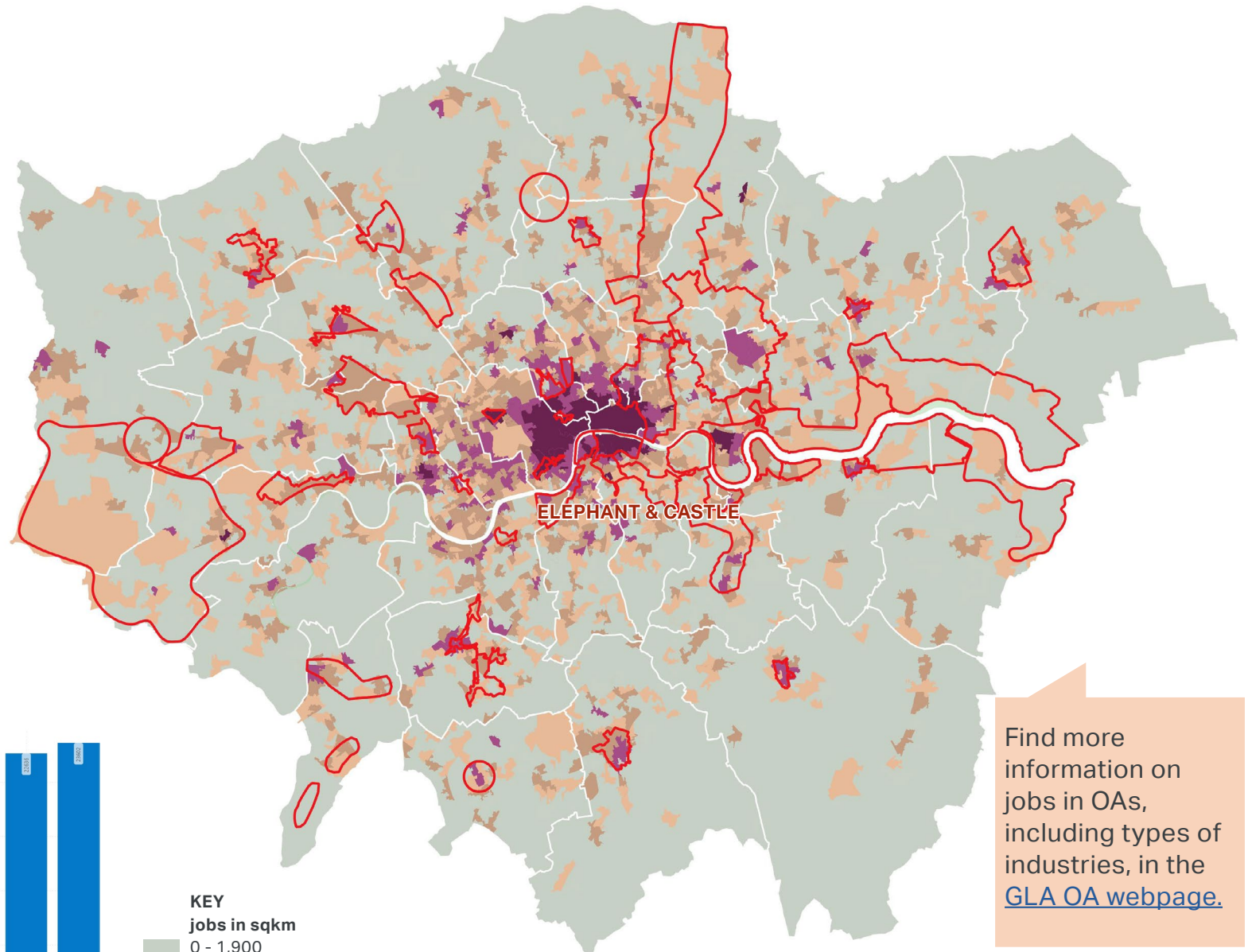
- ① **128-150 Blackfriars Road London SE1 8EQ (14/AP/1862):** 336 homes completed in 2017.
- ② **Former Leisure Centre 22 Elephant And Castle London SE1 6SQ:** 284 homes completed.
- ③ **31 Amelia Street London Southwark SE17 3PY:** 146 student rooms approved in December 2024.
- ④ **5-9 Rockingham Street And 2-4 Tiverton Street London SE1 6PF:** 244 student rooms, approved in August 2023.
- ⑤ **87 Newington Causeway London Southwark SE1 6BD:** 48 homes approved in September 2018. (12/AP/2239): 284 homes delivered.



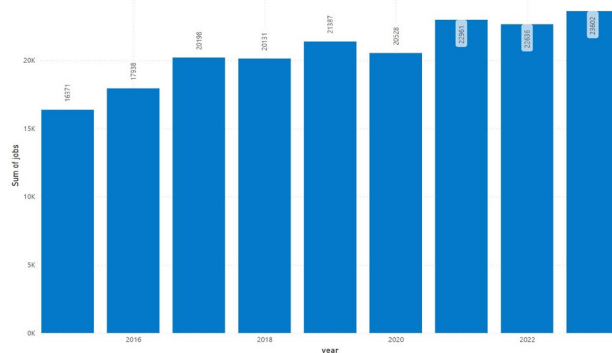
KEY
 Site allocation - LB Southwark

Elephant & Castle Jobs

- Positive trends in jobs since 2015.
- In 2023, there were 23,602 jobs in the Elephant & Castle OA, which accounts for 8 per cent of the jobs in the borough.



Jobs by year in the OA



Source: Census, Business Register

KEY
jobs in sqkm

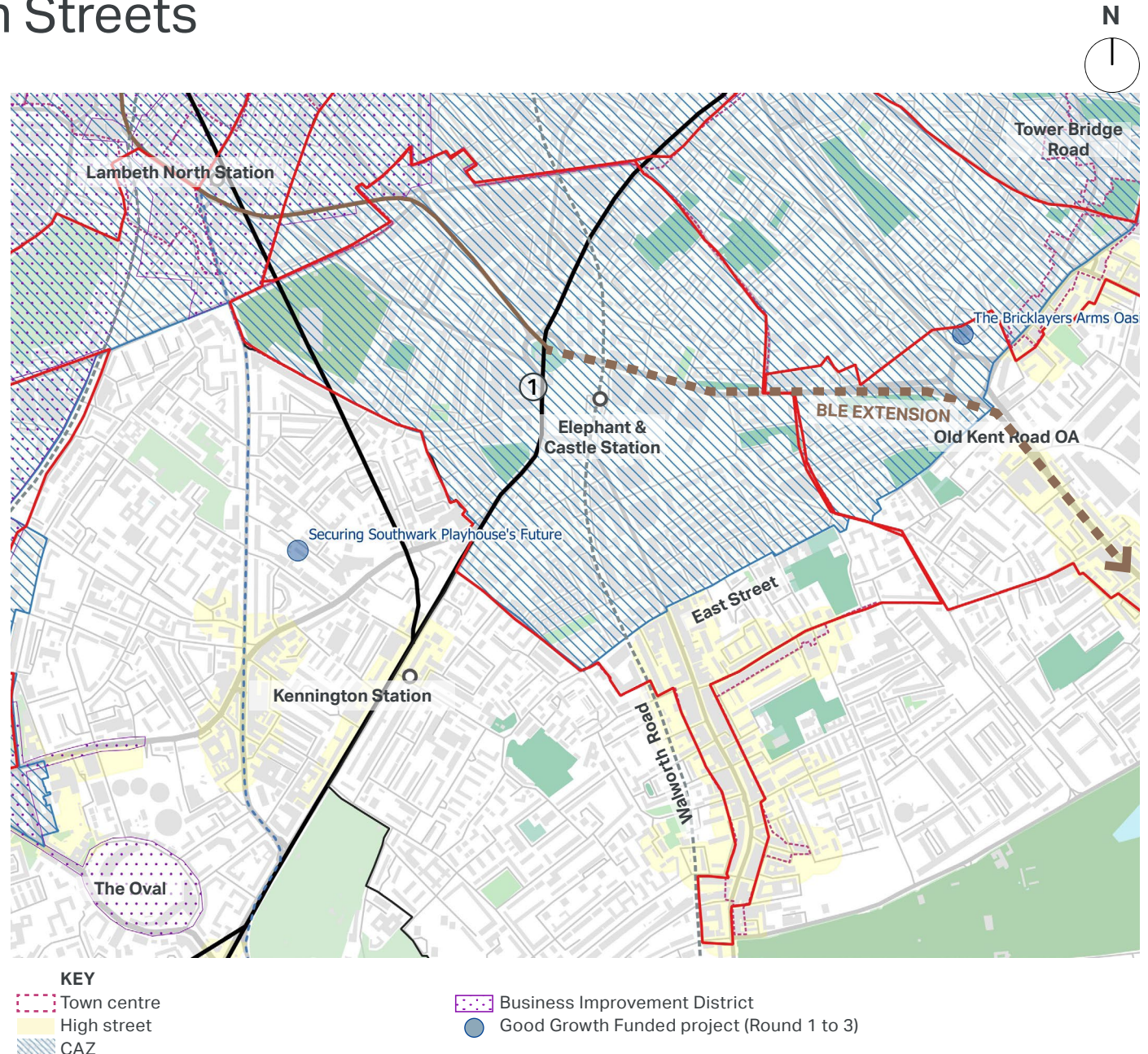
- 0 - 1,900
- 1,900 - 4,000
- 4,000 - 13,000
- 13,000 - 60,000
- above 60,000

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

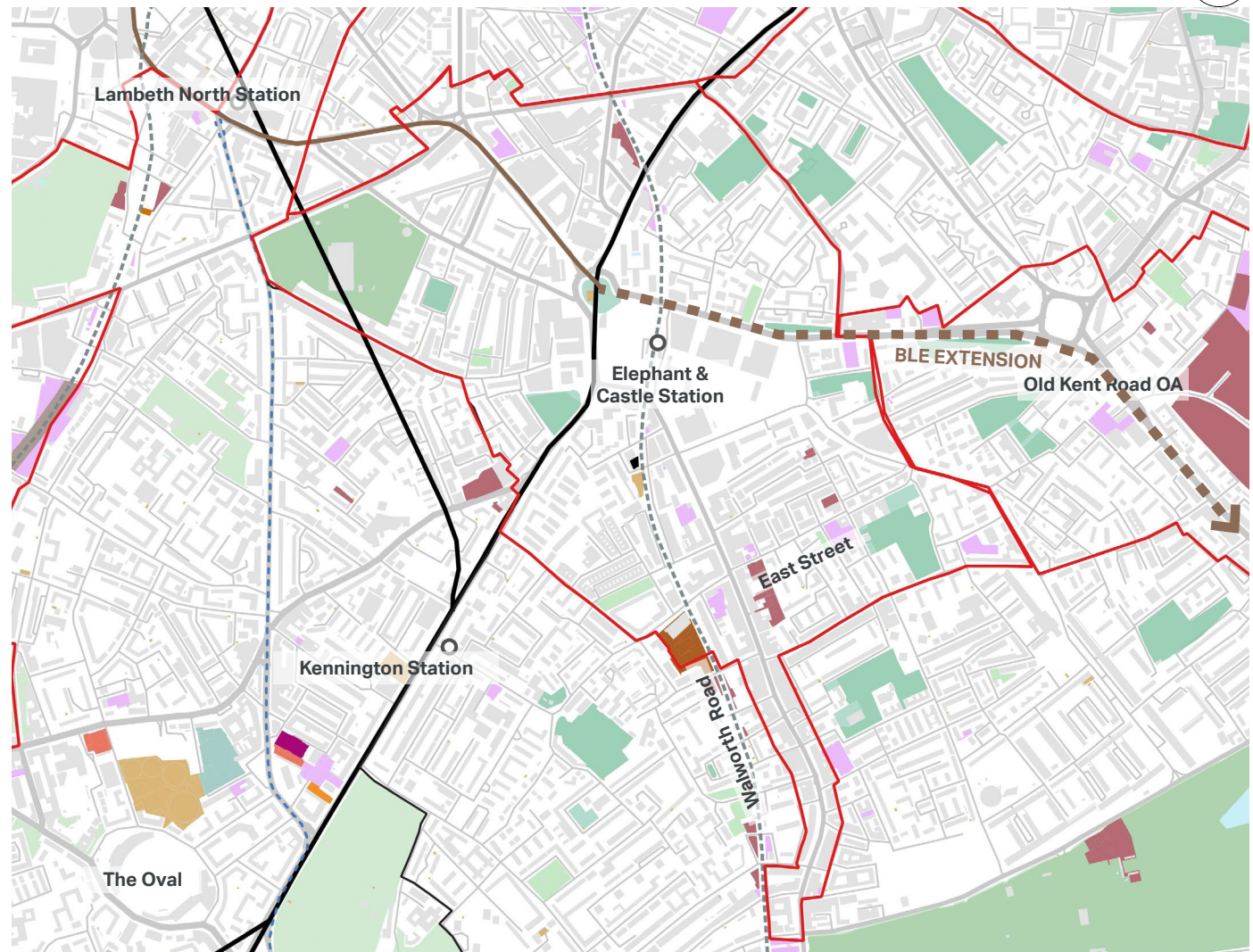
- Major Town Centre for Southwark residents.
 - The Local Plan requires development to provides opportunities for existing small businesses from minority ethnic groups, flexible workspaces and community spaces.
- ① At 2-acres, the Park within Elephant Park is an inclusive and valuable urban recreational space that is free, fully accessible and open to all. The Park comprises large lawn areas for exercise, play clusters, and quieter, lushly planted seating areas where people can escape and relax.



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Industrial Land: Types of industry

- There is no protected industrial land in the OA.
- Warehouse, waste management and recycling as well as general industry are the only industrial uses in the OA.



Source: London Industrial Supply Study

| KEY | |
|--|--------------------------------|
| ■ | Data centre |
| ■ | Docks |
| ■ | Film and TV studios |
| ■ | General Industry |
| ■ | Community Services |
| ■ | Land for buses |
| ■ | Land for rail |
| ■ | Land with vacant buildings |
| ■ | Light Industry |
| ■ | Open storage |
| ■ | Self storage |
| ■ | Utilities |
| ■ | Vacant industrial land |
| ■ | Warehouse |
| ■ | Waste management and recycling |
| ■ | Wholesale market |

Elephant & Castle

Place strategies: The Elephant & Castle Town Centre

The Elephant & Castle Town Centre scheme at the heart of the OA is part of the Southwark regeneration programme. It aims to:

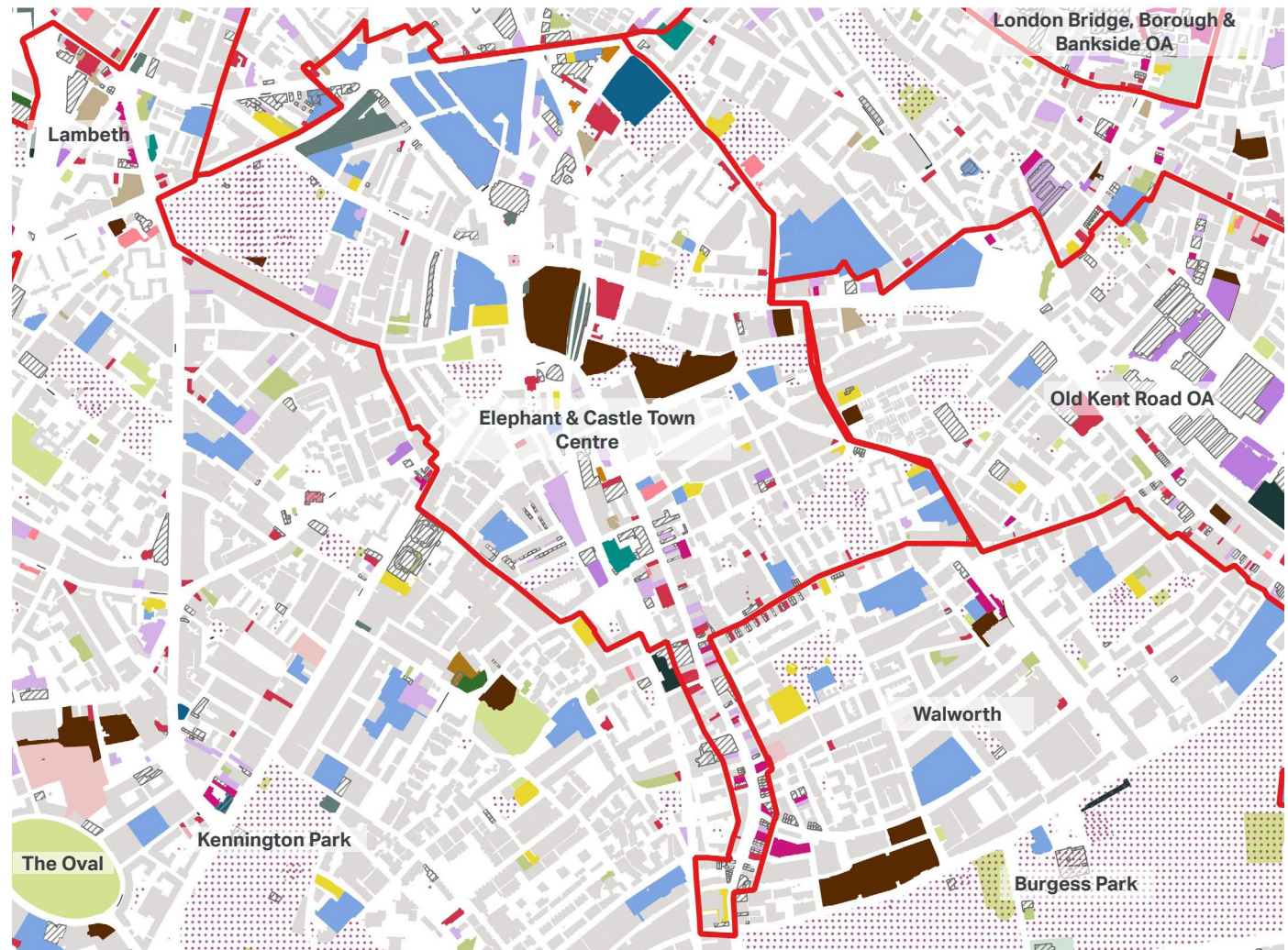
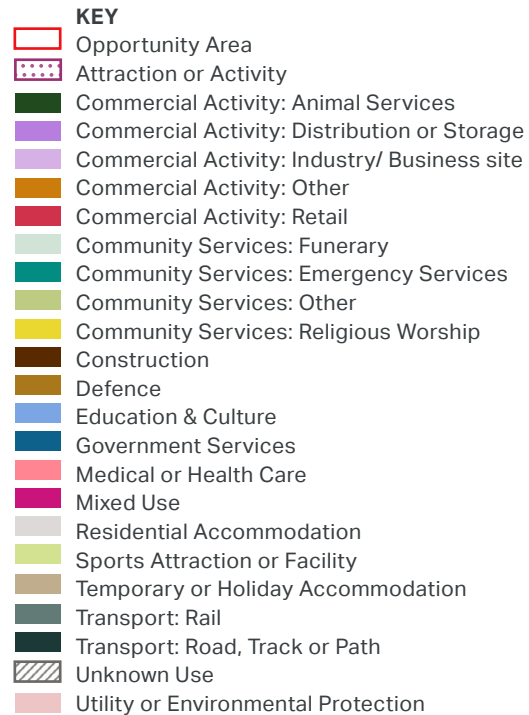
- Reinvent the town centre with a broad mix of uses including flexible work space and mix of leisure and retail uses in three main phases.
- Deliver 983 homes for rent.
- Create approximately 2,000 full time jobs in the town centre and 1,200 construction jobs per year for a decade.
- Deliver a dynamic university campus building for UAL London College of Communication.
- Improve 24 hour connectivity through the introduction of an integrated transport hub and a new tube station doubling the existing of the underground station capacity - future proofing for the Bakerloo Line Upgrade and Extension (BLUE).
- Improve permeability of existing sites that are currently impermeable by delivering new streets, ground floor uses and links through the arches to Elephant Park.



Source: [Elephant and Castle Town Centre](#)

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Land uses



Source: OSNGB, City Intelligence Unit (GLA)

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Moving forward

Proposition

- OA status to be changed from 'Underway' to 'Maturing'.

Overview:

- The OA is within **the CAZ in Southwark** with an important role in the delivery of new jobs.
- The design, programming and accessibility of green/ open space is one of the successes of this OA (Elephant Park).

Homes Delivery:

- Elephant & Castle is performing at 57 per cent of its 10 year homes capacity, and at 20 per cent of its 22 year capacity,
- Relatively high pipeline of 3,371 homes putting it on track to meet 87 per cent of its 22 year capacity. Most homes attributed to Elephant Park.

Jobs:

- Significant increase in approvals for non-residential floorspace in 2023/24.
- Positive trend in number of jobs since 2015.
- Between 2019 and 2022, approximately 1,252 jobs. were created. The LESD estimates 7,100 jobs by 2041 and London Plan indicates 5,000 jobs capacity.

Infrastructure:

- The Bakerloo Line upgrade and revamping of relevant stations in the OA is currently unfunded.



Elephant Park (Source: Lendlease)

