LONDON STRATEGIC HOUSING LAND AVAILABILITY ASSESSMENT 2017

EiP Technical Seminar
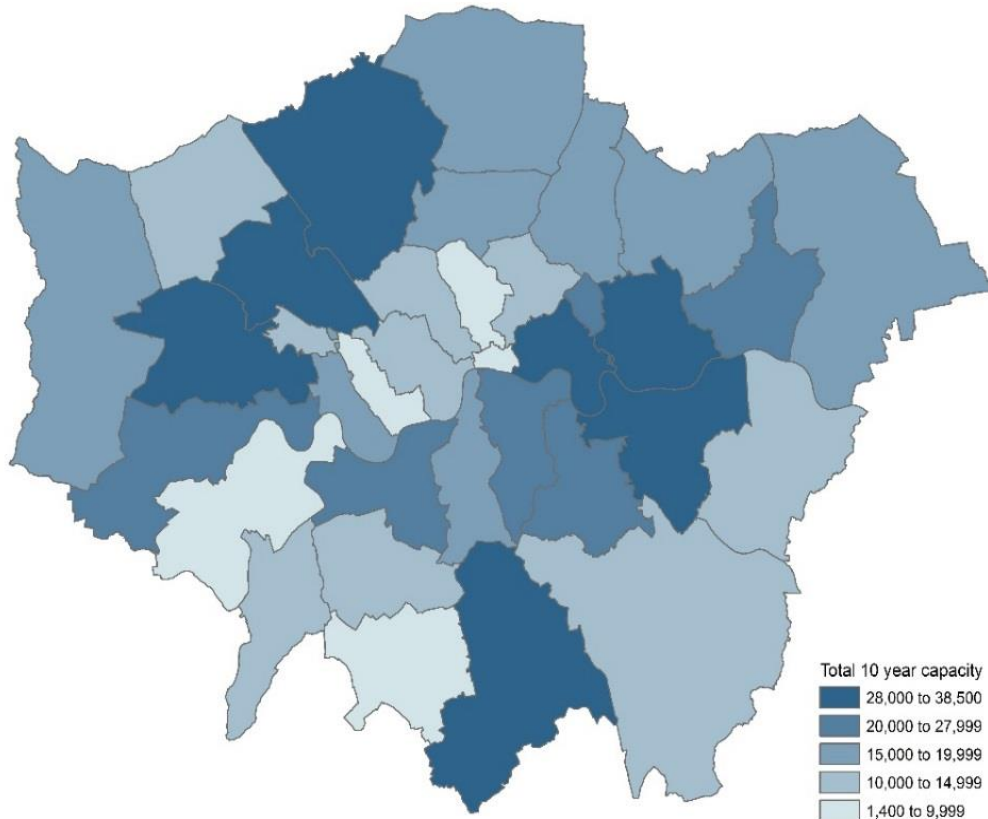
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Introduction

- Part 1 – large site assessment

- Part 2 – small sites

- Q & A

Overall housing capacity

- 65,000 homes a year

- Large sites - 40,000 homes a year (62%)

- Small sites – 24,500 (38%)

Total 10 year capacity
- 28,000 to 38,500
- 20,000 to 27,999
- 15,000 to 19,999
- 10,000 to 14,999
- 1,400 to 9,999

- Large sites
- Modelled small sites figure
- Remaining small sites windfall figure
- Non self contained pipeline

9% 0.5%

29%

62%
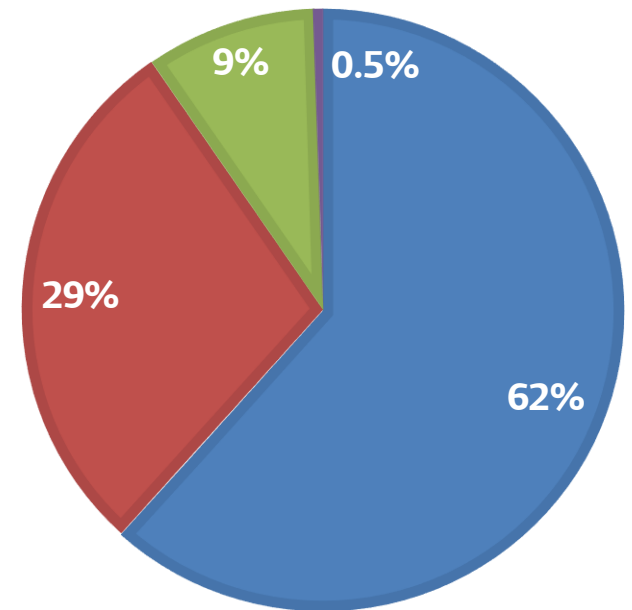
Large sites

Content:

- Brief overview of the methodology

- Site sources

- SHLAA system

- Site assessment process

- Site status categories

- Density assumptions

Large sites

- 0.25 hectares and more in size

- 400,000 during 10 year target period (2019/20 to 2028/29)

❑ Approvals - 35%

❑ Allocations – 39%

❑ Potential development – 25%

❑ Low probability sites – 1%
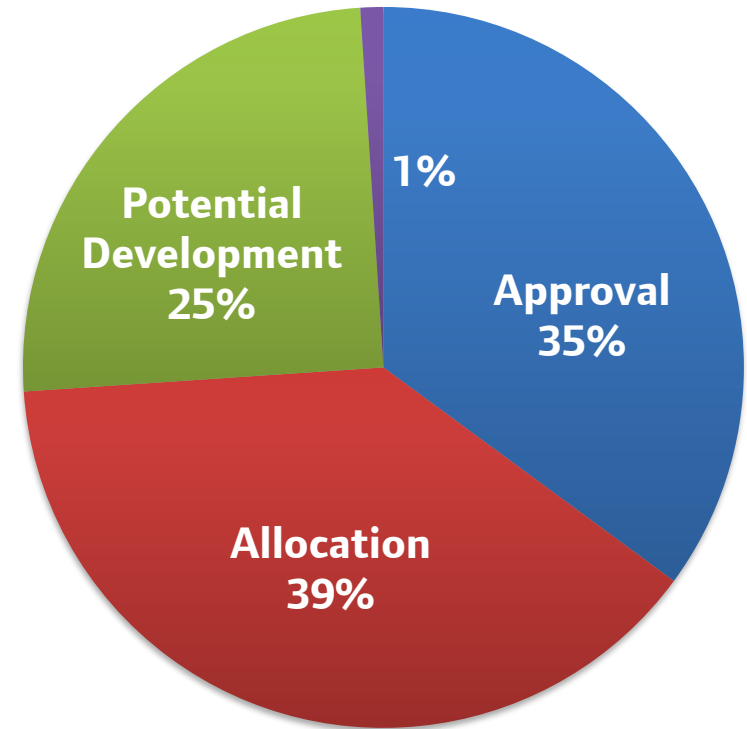
Approvals

- Site boundaries, housing completions and net additional housing figures derived from London Development Database

- Boroughs then review and update this information

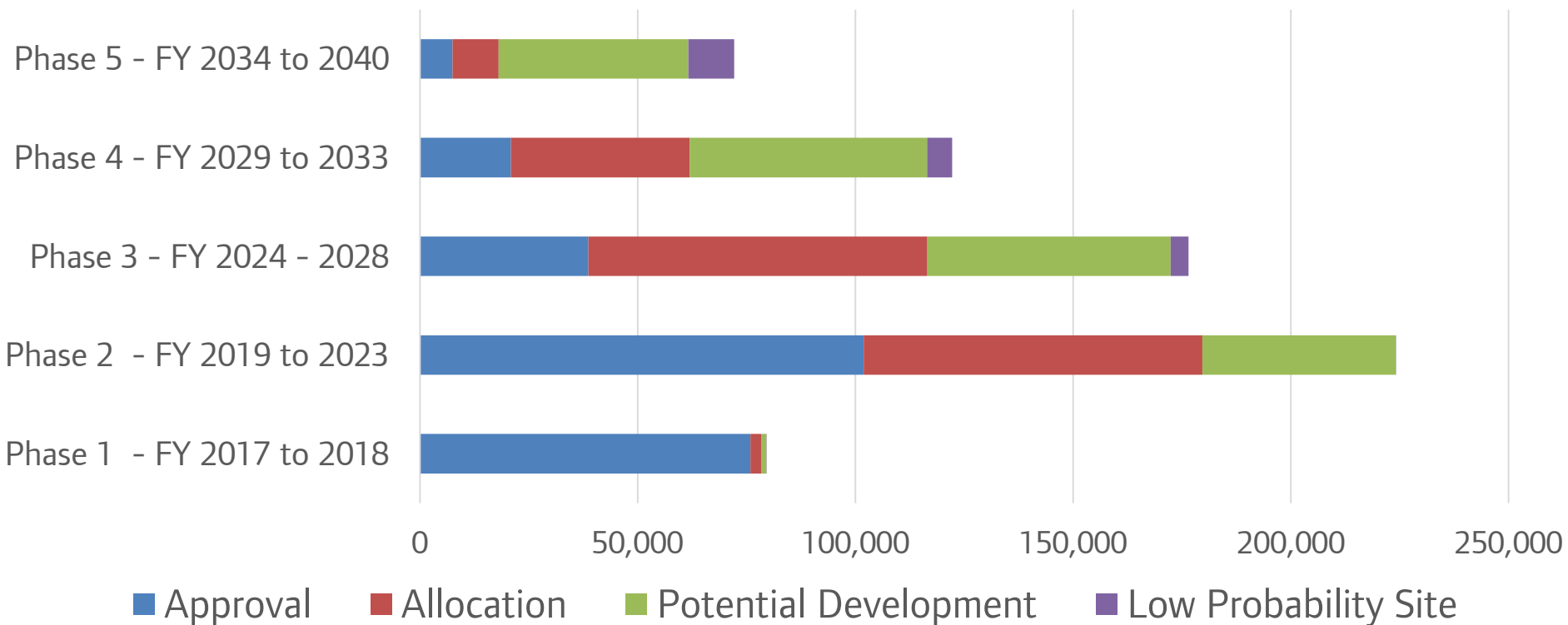- Provide site specific phasing assumptions drawing on local knowledge.

Site allocations

Site area $\times$ % of site assumed to be in residential use $\times$ Density $=$ Housing capacity

Housing capacity is spread across phasing periods taking into account site circumstances

Phasing

Phase 1	Phase 2	Phase 3	Phase 4	Phase 5
2017/18 to 2018/19	2019/20 to 2023/24	2024/5 to 2028/29	2029/30 to 2033/34	2034/5 to 2040/41

Large site capacity by phasing period

Constraints model approach

Planning policy constraints	• Designated open space • Strategic Industrial Land (SIL) • Locally Significant Industrial Locations (LSILs) • Other protected industrial/employment sites • Safeguarded Wharves
Environmental Constraints	• Flood Risk • Aircraft noise pollution • Health and Safety Executive consultation zones • Pylons/High voltage power lines
Delivery constraints	• Land ownership • Local Infrastructure • Contamination

Methodology for assessing capacity on potential sites

Notional housing capacity

Site area **X** % of site assumed to be in residential use **X** Density **=** Notional housing capacity

Constrained housing capacity

Notional housing capacity **X** % Site Probability **=** Constrained housing capacity

Worked example – potential site

Notional housing capacity

1 hectare site **X** 80% of site assumed to be in residential use **X** Density of 250 dph **=** Notional housing Capacity of 200 units

Constrained housing capacity

Notional housing Capacity of 200 units **X** 70% Site Probability **=** Constrained housing Capacity of 140 units

Site status categories

| Site status categories	
🟩	**Approvals**
🟩	**Allocations**
🟩	**Potential development**
🟧	**Unsuitable**
🟨	**Low probability**
🟦	**Excluded**
⬛	**Deleted**

Low probability sites

- 8% probability assumed

- Capacity spread across phases 3, 4 and 5

- Sites considered by boroughs to have a low probability *and* fall into the following categories:

  ❑ High value commercial development

  ❑ Office sites (5% and 10% assumed depending on location)

  ❑ Substantial land ownership issues

  ❑ Further education or hospital

  ❑ Social housing estates

  ❑ Social infrastructure or community use

  ❑ Other reasons - specified

Excluded sites

- 0% probability assumed

- Potential sites that boroughs considered to have a zero probability for housing *and* fall into the following categories:

  - ❑ New build housing

  - ❑ New build non-residential development - eg commercial, leisure

  - ❑ Protected office sites in core commercial areas

  - ❑ Protected high value business park / office sites

  - ❑ Primary and secondary schools

  - ❑ Private/mixed tenure housing in multiple ownership

  - ❑ Listed building or other designated heritage asset where housing is highly unlikely due to harm / loss

  - ❑ Strategic operational transport infrastructure, waste and utilities sites

  - ❑ Strategic cultural / tourist venues or civic buildings

Site source

Site source	Sites
LDD approvals pipeline	817
Call for sites	917
Development capacity study sites	1,405
2013 SHLAA	6,075
UK Map – Land Use data	2,175
Added by LPAs	282
Total	**11,671**
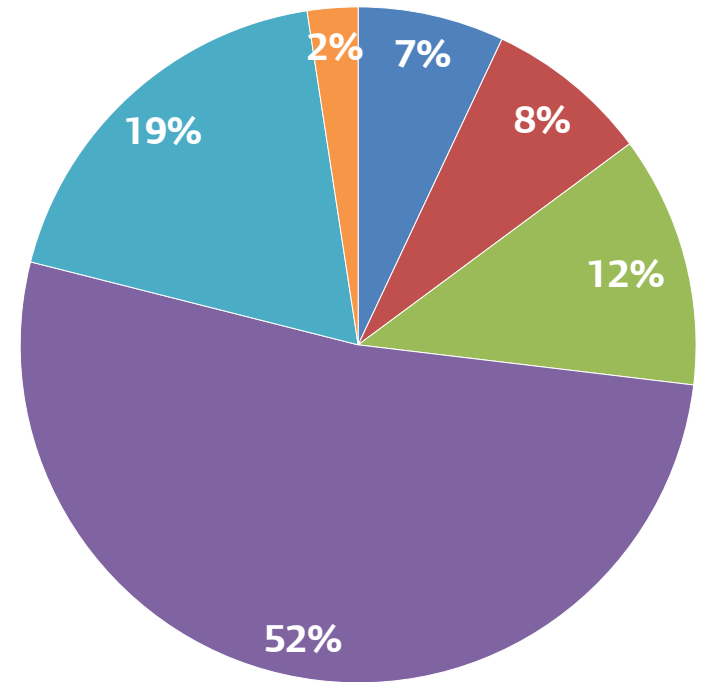
- LDD approvals pipeline
- Call for sites
- Development capacity study sites
- 2013 SHLAA
- UK Map – Land Use data
- Added by local planning authorities

SHLAA large site system

Site assessment process

1) Site upload

2) Initial system default status / density

3) Borough site assessment

4) GLA review & feedback

5) One to one meetings between GLA & individual borough

6) Final GLA review & consistency check

Large sites uploaded to system

PTAL map and character settings GIS layers inform estimated site density → Initial site status, probability and density established ← GIS layers for planning policy designations and environmental constraints inform initial probability assumptions

Call for sites information → Borough site assessment to:
- Site status
- Constraints
- Land use mix
- Density
- Probability
- Phasing
← Land ownership information

Borough local knowledge → ← GLA Waste Map

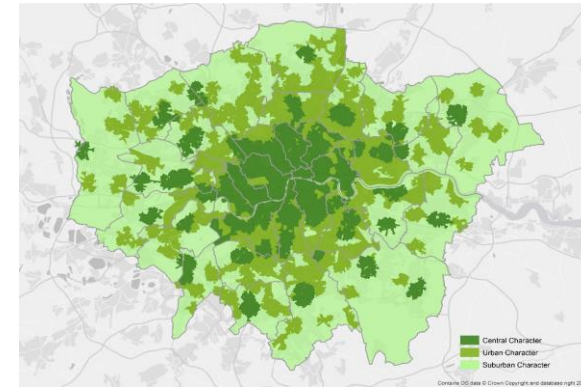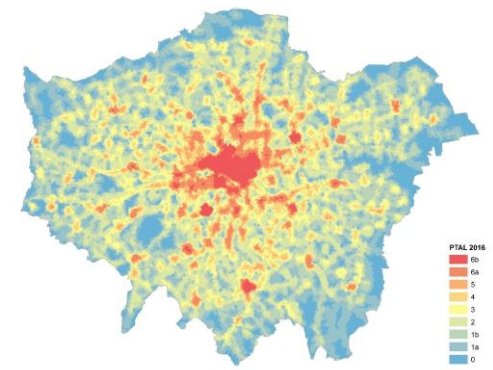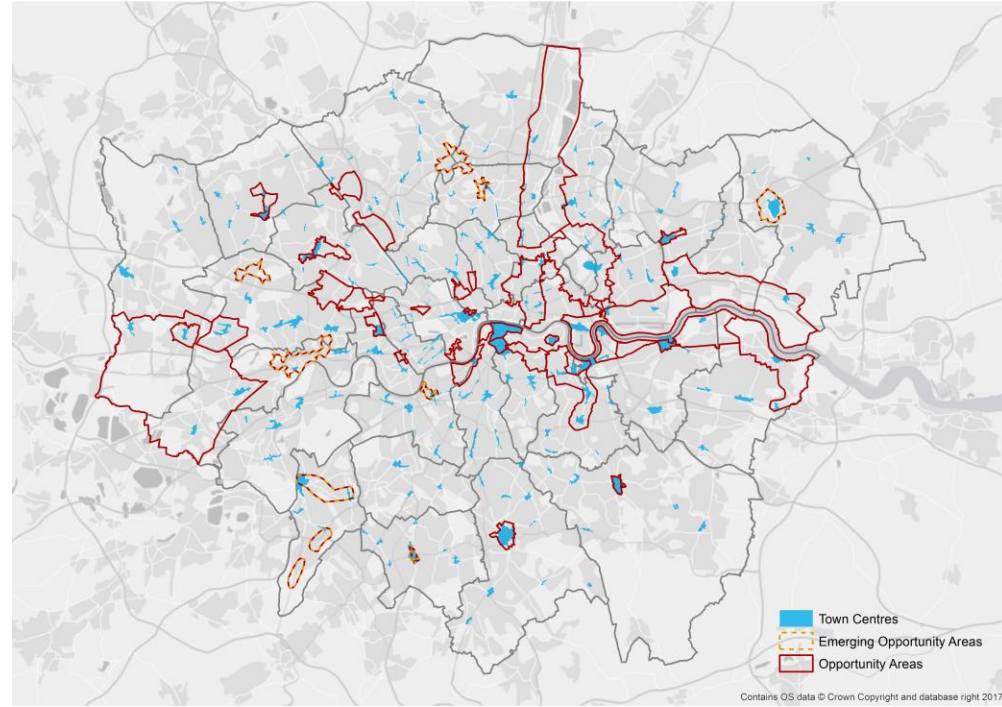Input from GLA Development & Projects, Opportunity Area Planning Frameworks team, Housing & Land Area Teams and Transport for London → GLA review & written feedback to boroughs. Specific sites flagged 'for discussion' in the SHLAA system ← Boroughs & GLA consider if identified constraints impacting site density, probability or phasing could be mitigated and resolved by a particular point in time.

Borough-GLA one to one meeting to run through sites flagged 'for discussion' and agree changes

Evidence on industrial demand/supply → Final GLA consistency check and review of site assessments, capacity findings and impacts on other policy and land use considerations ← GLA review of findings in Central Activities Zone

Existing & proposed transport safeguarding → ← GLA review to flag any large sites that would more likely come forward as small sites (less than 0.25 hectares)

Final large site capacity established

Standard density assumptions (dph)

PTAL	0 to 1	2 to 3	4 to 6
Suburban	65	80	115
Urban	80	145	225
Central	100	210	355

65

145

210

355

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Public Transport Access Levels (PTALs)

PTAL 2016
- 6b
- 6a
- 5
- 4
- 3
- 2
- 1b
- 1a
- 0

Town Centres
Emerging Opportunity Areas
Opportunity Areas

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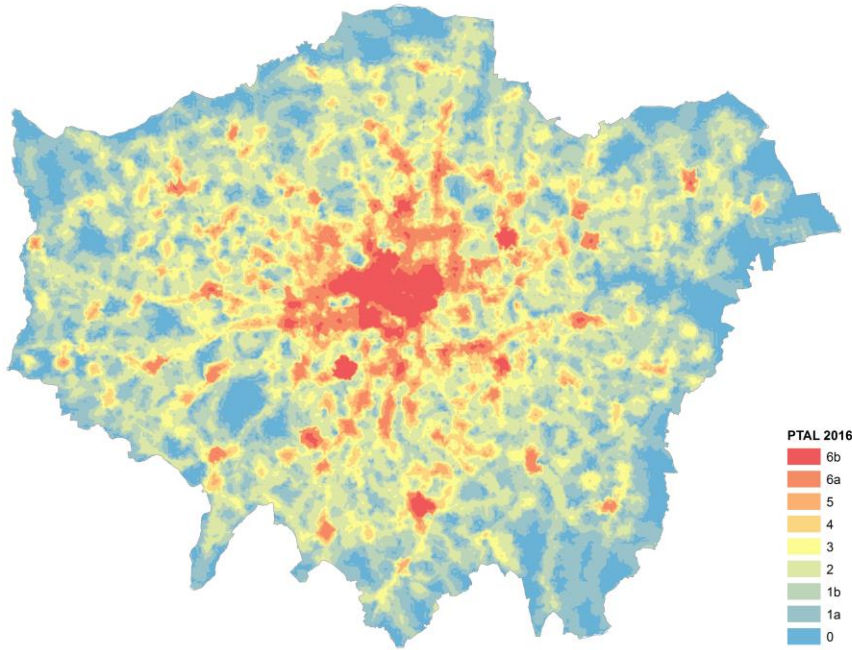
3 maps used:

- 2016 – baseline
- 2021
- 2031

SHLAA phase	Phase 1	Phase 2	Phase 3	Phase 4	Phase 5
PTAL Map relied on	2016	2021	2021	2031	2031

Setting areas

.Table 2.7 – setting areas attributes

| Setting	Attributes	
	Housing stock[6]	Proximity to town centre
Central	more than 75% flats	1km of International, Metropolitan or Major town centre boundary
Urban	more than 75% flats and terraced housing	1km of District town centre boundary
Suburban	less than 75% flats and terraced housing	All other areas beyond the above spatial catchment

Central Character
Urban Character
Suburban Character

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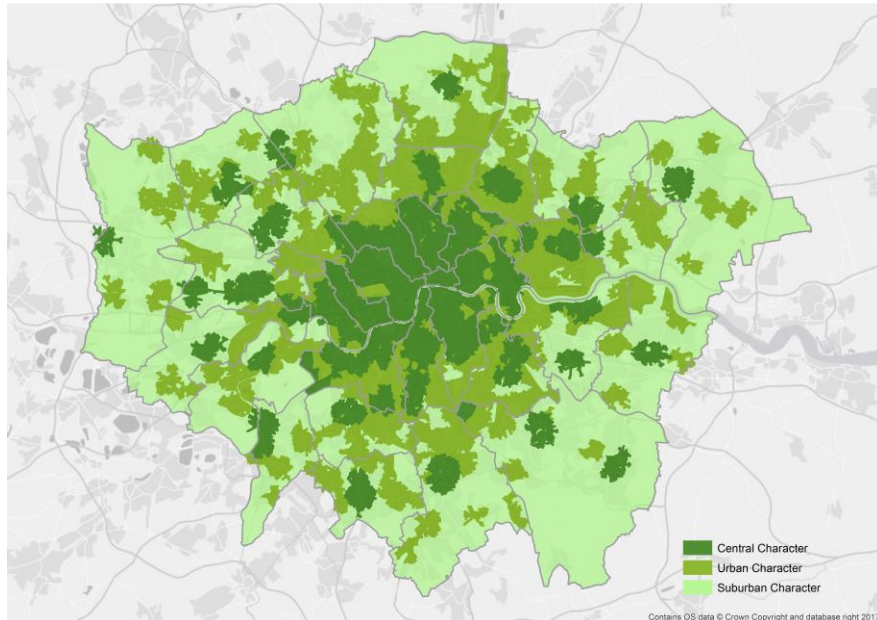
Town centres densities (dph)

PTAL	0 to 1	2 to 3	4 to 6
Suburban	-	-	-
Urban	95	170	260
Central	110	240	405

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Opportunity area densities (dph)

PTAL	0 to 1	2 to 3	4 to 6
Suburban (**becomes urban**)	80	145	225
Urban (**becomes central**)	100	210	355
Central (**becomes central +**)	**250**	**350**	**450**

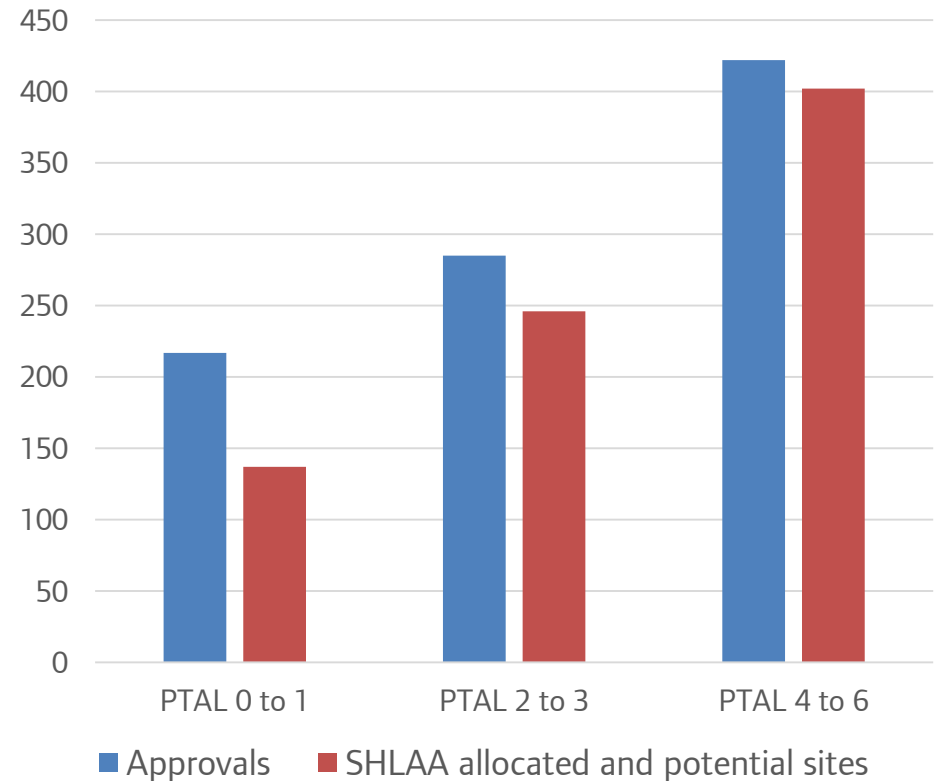GREATER**LONDON**AUTHORITY
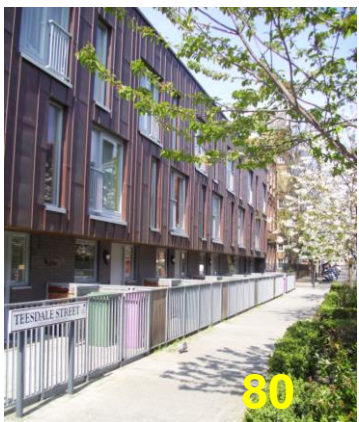
How do final SHLAA density assumptions compare to average approvals trends?

Standard assumption
(outside OAs / TCs)
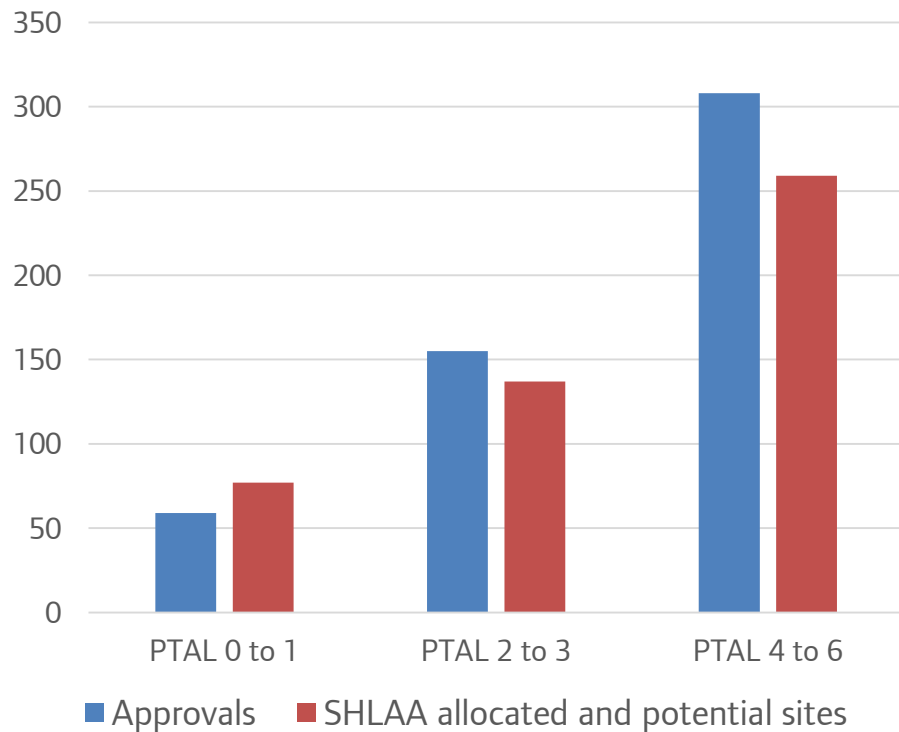
Opportunity areas
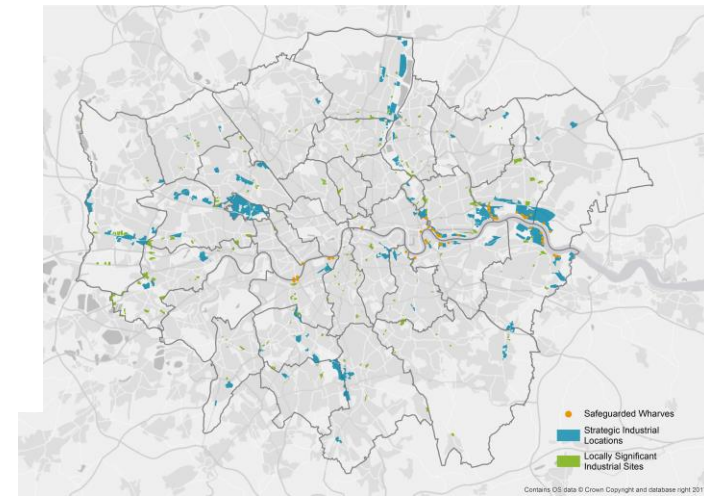
Planning policy constraints

| Constraint	Categories	Default probability assumption
Designated open space	Yes or no	0% probability - unsuitable
Strategic industrial location (SIL)	Yes or no	0% probability – unsuitable
Safeguarded Wharves	Yes or no	0% probability - unsuitable
Locally Significant Industrial Sites (LSIS) designated in a Local Plan	Restricted	40% probability
	Limited	50% probability
	Managed	60% probability
Other protected non-designated industrial/employment sites	Restricted	45% probability
	Limited	55% probability
	Managed	60% probability

Designated Open Space

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Safeguarded Wharves
Strategic Industrial Locations
Locally Significant Industrial Sites

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Environmental constraints

Constraint	Categories	Impact on probability
Flood risk	Low – Flood Zone 2 and all other areas	No impact on probability
	Medium - Areas in Flood Zone 3 with flood defences	Reduces probability by 5%
	High - areas in Flood Zone 3 without flood defences	Reduces probability by 10%
	Unsuitable - Flood Zone 3b	Site considered unsuitable (0% probability)
Aircraft noise pollution	Low - below 63 Db	No impact on probability
	Medium - above 63 Db	Reduces probability by 10%
	High - above 69 Db	Site considered unsuitable (0% probability)
Pylons / High voltage power lines	Low - none present	No impact on probability
	Medium - site intersects with pylon	Reduces probability by 10%
Health and Safety Executive consultation zones	Low – No HSE Zone or Outer Zone	No impact on probability
	Medium – Middle Zone	Reduces probability by 10%
	High – Inner Zone	Site considered unsuitable (0% probability)
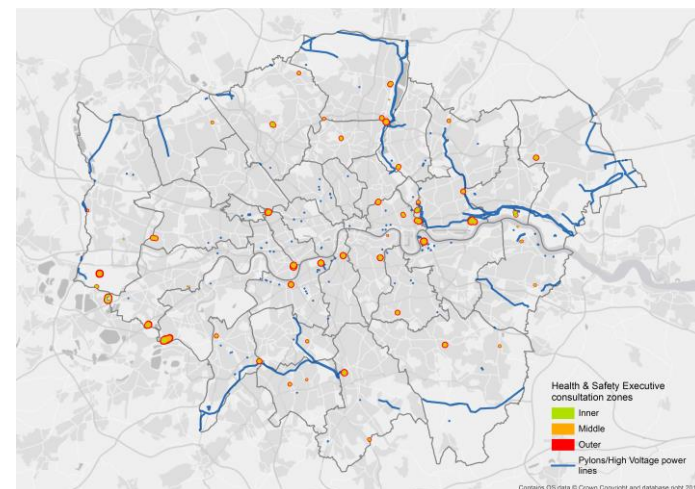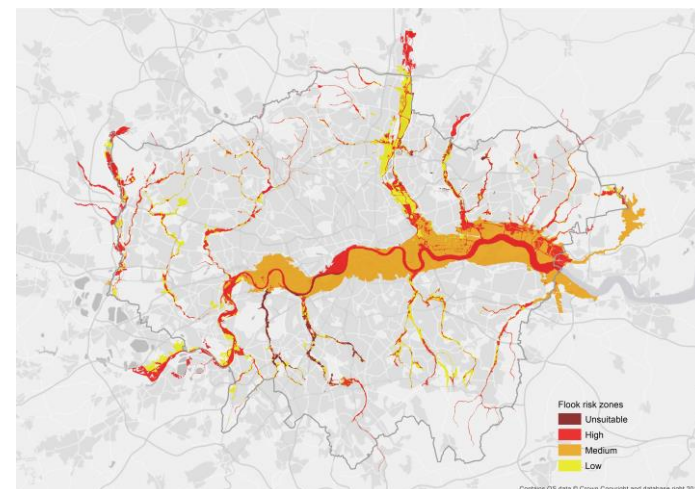
Delivery constraints

Constraint	Categories	Impact on probability
Land ownership	Low	No impact on probability
	Medium	Reduces probability by 10%
	High	Reduces probability by 30%
Local infrastructure	Low	No impact on probability
	Medium	Reduces probability by 10%
	High	Reduces probability by 20%
Contamination	Low	No impact on probability
	Medium	Reduces probability by 10%
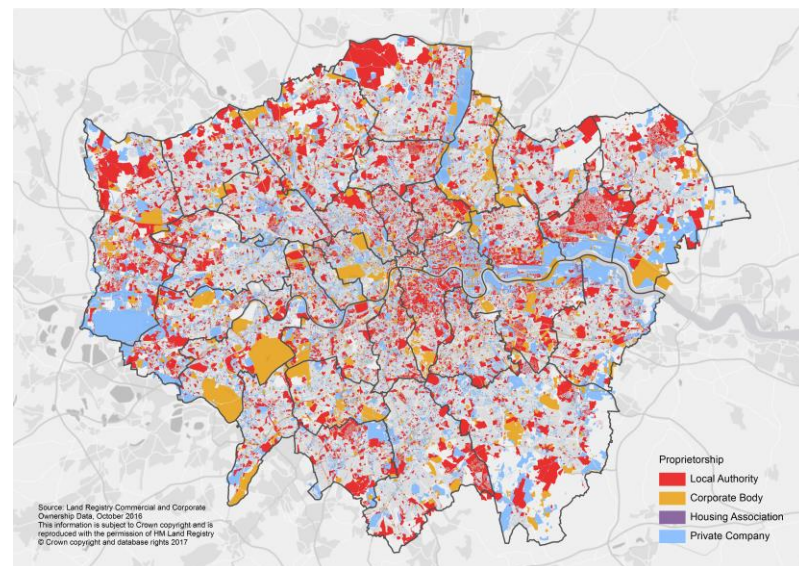
Industrial land

GLA changes in respect of designated industrial sites put forward as suitable for housing by boroughs

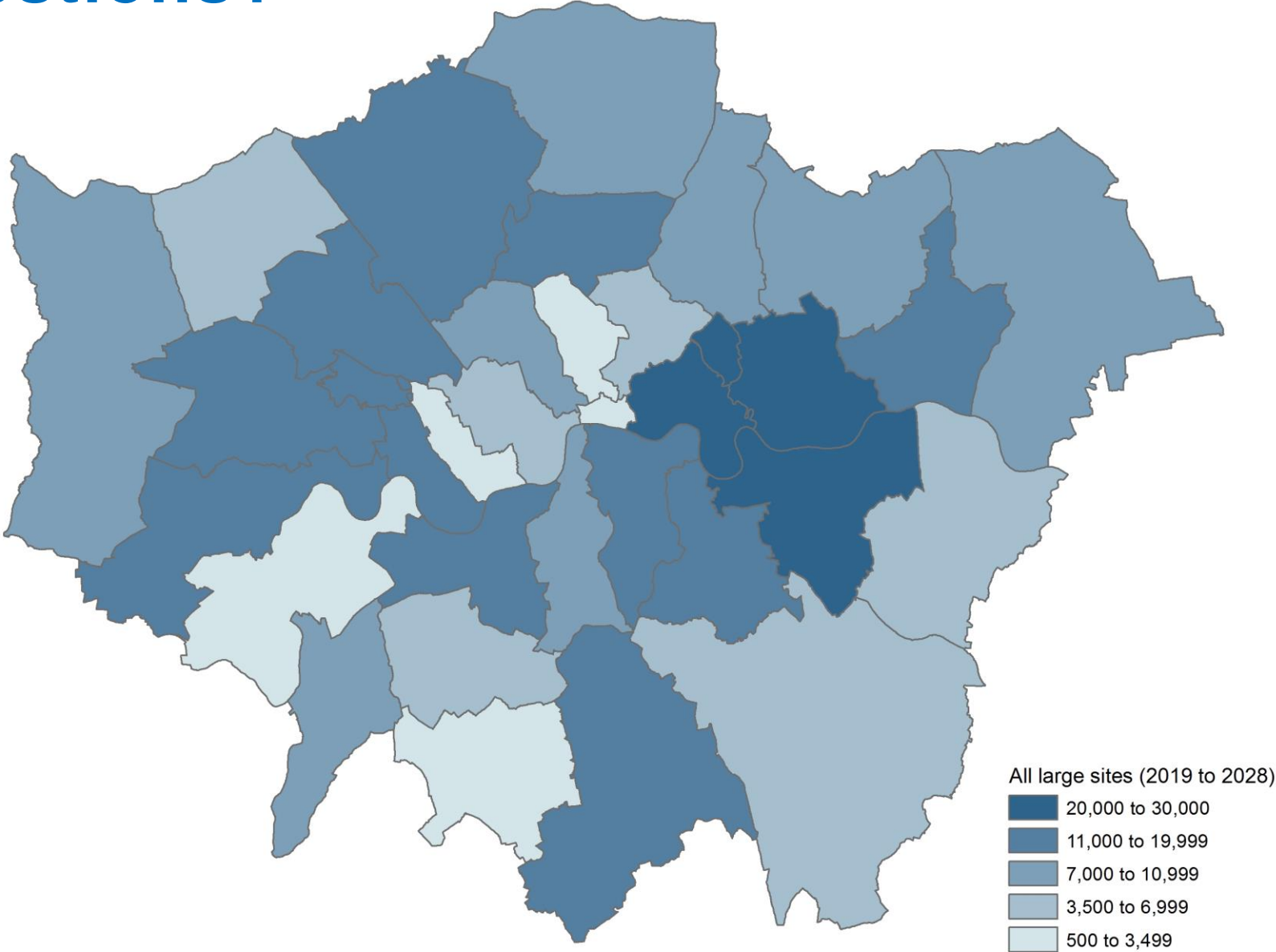|	Strategic Industrial Land (SIL)	Locally Significant Industrial Sites (LSIS)	Total
Sites where capacity was removed from phase two and three	20	91	111
Hectares of designated industrial land on these sites	53	98	150
Housing capacity removed from phase two and three	4,717	4,297	9,014

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Criteria for industrial land review

Most potential development sites that are currently designated industrial were re-phased in SHLAA (post 2030).

However, some designated sites left in the 10 year housing target period where:

- approvals

- allocations

- surplus utilities or transport infrastructure sites promoted via Call for Sites by landowner.

- sites in non-SIL/LSIS compliant uses – eg retail

- industrial uses assumed in the SHLAA site assessment

- scope for intensification and co-location of housing alongside industrial floorspace through mixed use development

Questions?

All large sites (2019 to 2028)
- 20,000 to 30,000
- 11,000 to 19,999
- 7,000 to 10,999
- 3,500 to 6,999
- 500 to 3,499

Small sites

All housing completions on sites below 0.25 hectares in size

3 different approaches considered

1. Recent windfall assessment

2. Longer term windfall assessment

3. A modelled approach
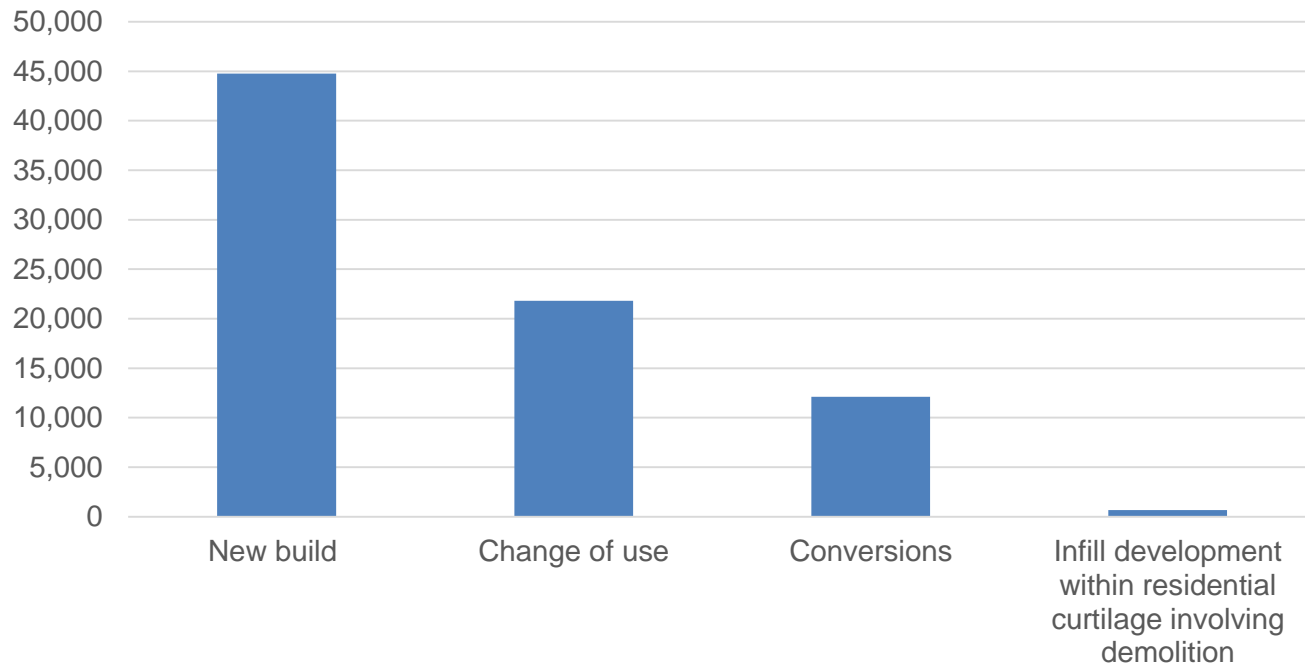
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Approach 1

8 year post-recession windfall trends

Timescale: 2008/9 to 2015/16

Total homes ÷ years = annual rate

Annual rate = 9,370

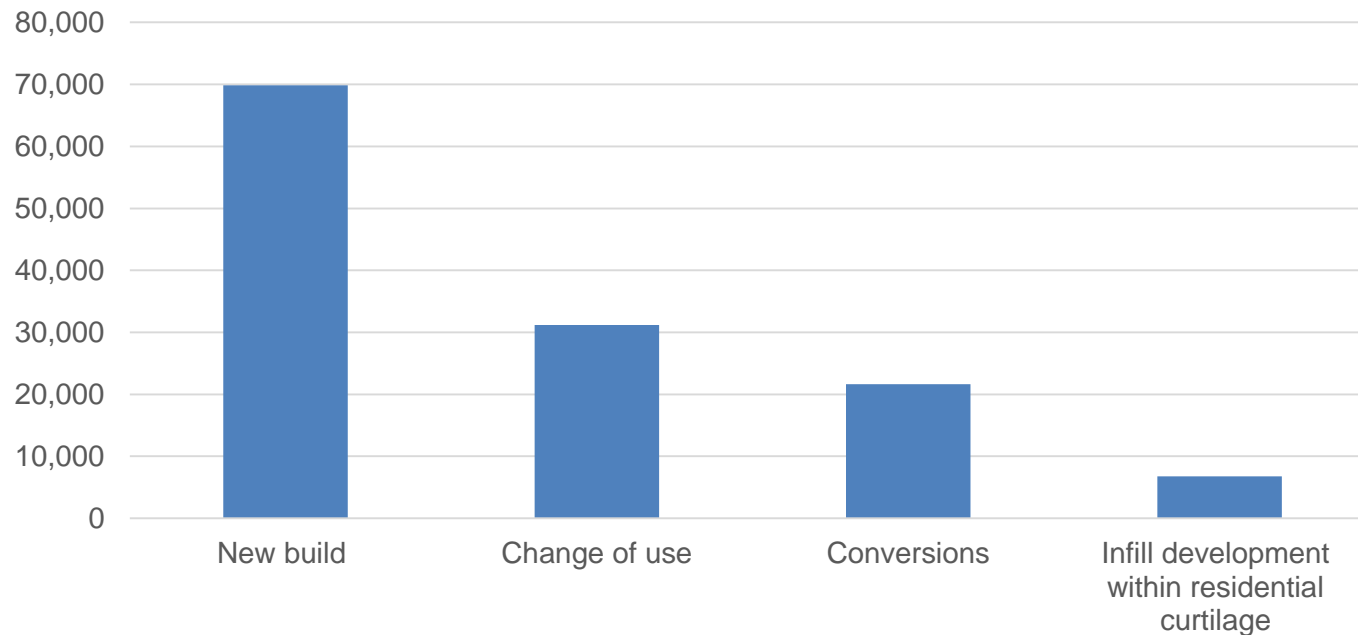Projected 10 year windfall capacity = **93,700 homes**

Approach 2

12 year long-term windfall trends

Timescale: 2004/5 to 2015/16

Total homes ÷ years = annual rate

Annualised rate = 10,400

Projected 10 year windfall capacity = **104,000 homes**

Approach 3

Modelled figures showing latent potential to increase the existing housing stock over time through small-scale housing intensification.

Combined with windfall trends for new build small sites (over 10 units) and change of use.

Results:

- Modelled 10 year capacity – 187,900 homes

- Remaining windfall capacity – 57,380 homes

- Total projected 10 year capacity = **245,280 homes**

Policy H2 – small sites

- Recognition of the role of small sites and small house builders in achieving housing targets

- Presumption in favour of small housing developments

- Small sites targets

- Recognition that character evolves over time and will need to change in appropriate locations

- Boroughs to proactively encourage additional housing and higher residential densities on small sites through development plans and design codes

- Increased planning certainty – brownfield registers, permission in principle, LDOs

Presumption in favour of small housing developments

<u>This covers:</u>

- infill on vacant or under-utilised small sites

- redevelopment and upward extensions to non-residential buildings and flats

- proposals to increase the net residential density of existing houses <u>in particular locations</u>* through:

  o Residential conversions (houses subdivided into flats)

  o Residential extensions (upward, rear and side)

  o Demolition / redevelopment of existing houses

  o infill development within the curtilage of a house

* PTAL 3 to 6 and/or within 800m of a station or town centre boundary

Aims of the policy

- increase and diversify housing supply

- reduce the reliance on very large brownfield sites and large volume housebuilders

- support small and medium sized housebuilders

- broaden the locations, mix and type of housing being provided

- increase housing supply in Outer London

- address housing affordability

- provide opportunities for custom/self-build schemes

Aims of the modelling

- Identifies London-wide trends for small-scale residential intensification

- Applies this at a greater rate across London to reflect the potential impact of Policy H2.

- Modelling takes into account:

  - Typology of the existing stock

  - Public transport access levels (PTAL)

  - Proximity to stations and town centres

  - Heritage assets (conservation areas & listed buildings)

Growth assumptions

- **1%** - within defined spatial locations: PTAL 3 to 6 and/or within 800m distance to stations and town centre boundaries

- **0.25%** - where these are covered by conservation area designations

- **0%** - in other areas

How does the model work?

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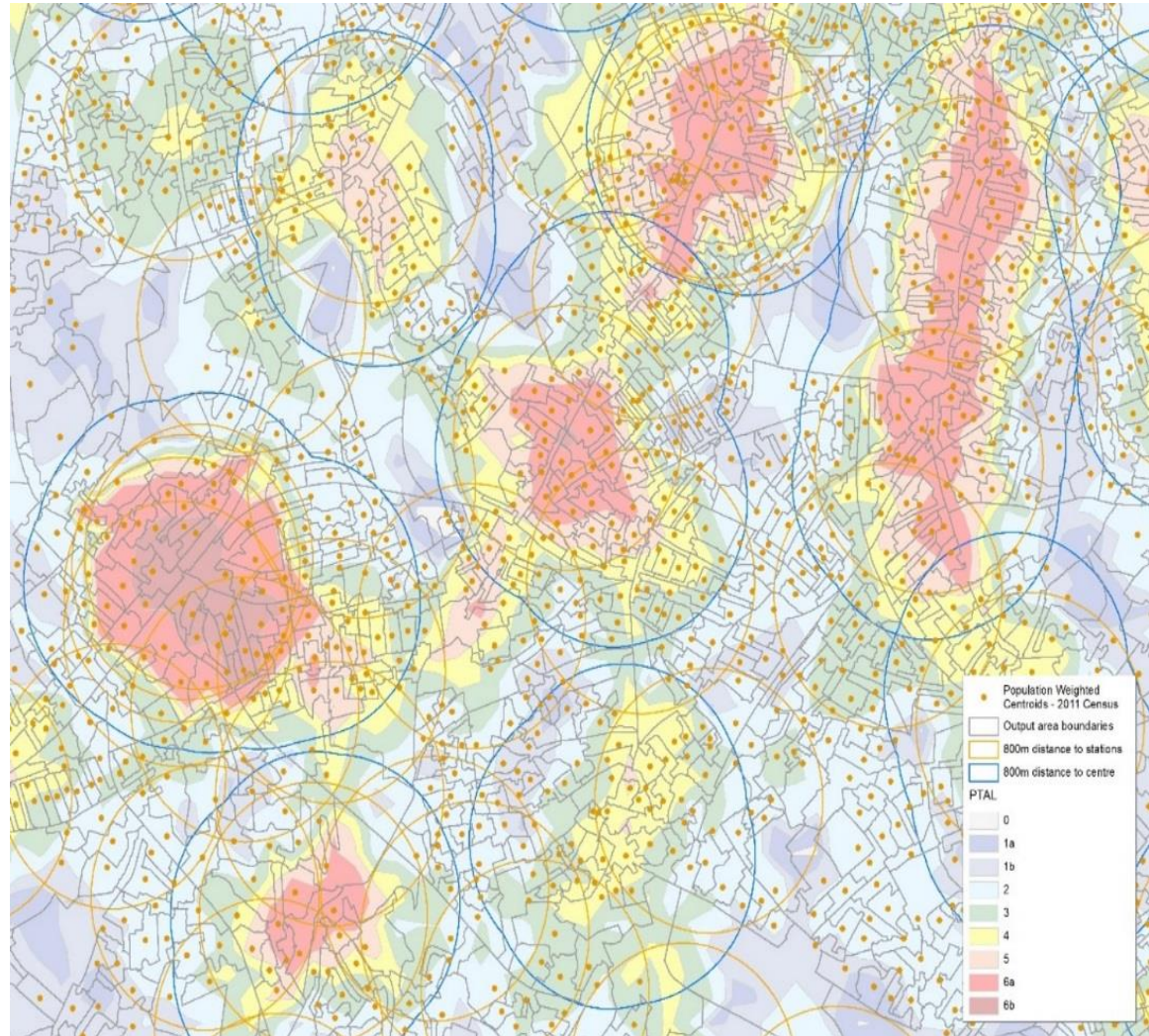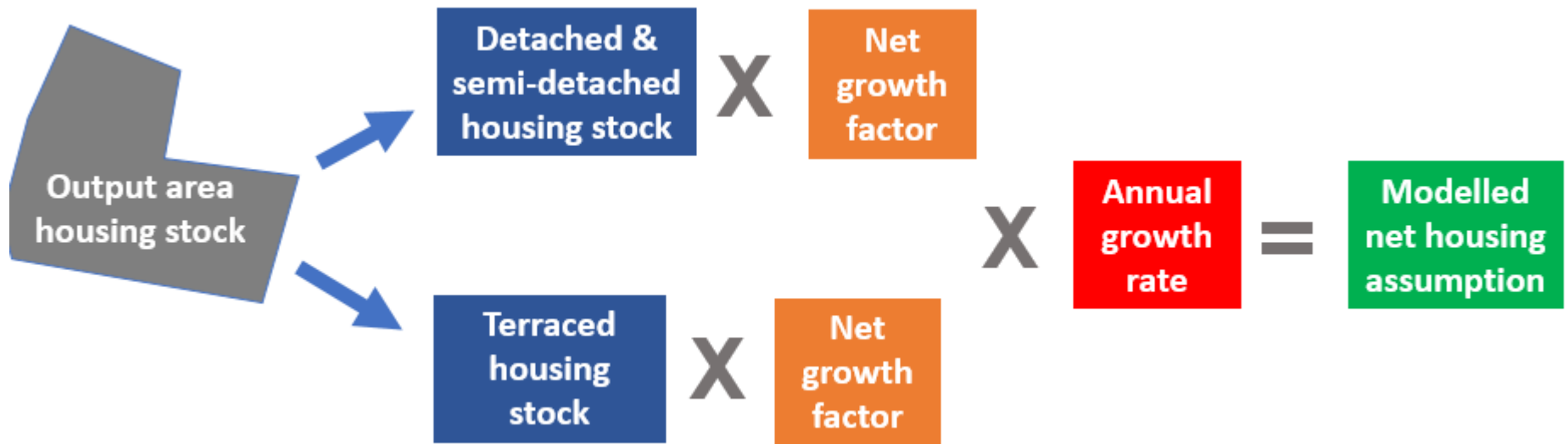
Net growth factors

Pan-London past trends in housing intensification

Baseline assumptions for <u>net</u> additional housing

2.23 – applied to <u>detached and semi-detached houses</u>

- This reflects pan-London average trends for net additional housing on sites under 10 units where the existing and proposed use is residential

1.34 – applied to <u>terraced houses</u>

- This reflects trends pan-London average trends for net additional housing in conversions only

Worked Example

Detached/semi detached houses	Growth assumption	Net Growth factor	Net additional housing (over ten years)
100	**1%**	2.23	22.3

Terraced Houses	Growth assumption	Net Growth factor	Net additional housing (over ten years)
100	**1%**	1.34	13.4

Ten year total (rounded)	36
Annual total (rounded)	4

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Worked example- conservation area

Detached/semi detached houses	Growth assumption	Net Growth factor	Net additional housing (over ten years)
100	**0.25%**	2.23	5.6

Terraced Houses	Growth assumption	Net Growth factor	Net additional housing (over ten years)
100	**0.25%**	1.34	3.4

Ten year total (rounded)	9
Annual total (rounded)	1

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Points of clarification

- 2011 census dwelling stock data

- Output area level data

- No growth assumptions applied to flats, only houses

- Recent new builds and conversions removed from stock figures

- 2021 PTALs

- Tube, rail, DLR and tram stations included

- Town centre boundaries

- Crow flies 800m walking distances to stations and centres

Remaining windfall

- This includes trends in completions on other small sites:
  - Change of use
  - New build small sites over 10 units
  - Capacity for **5,700 homes a year** from this source
  - Windfall timescale: 2008/9 to 2015/16

This does <u>not</u> include:

  - Completions on sites of 10 units and fewer in size
  - Residential conversions
  - office to residential permitted development

Questions?

Total 10 year capacity
- 28,000 to 38,500
- 20,000 to 27,999
- 15,000 to 19,999
- 10,000 to 14,999
- 1,400 to 9,999