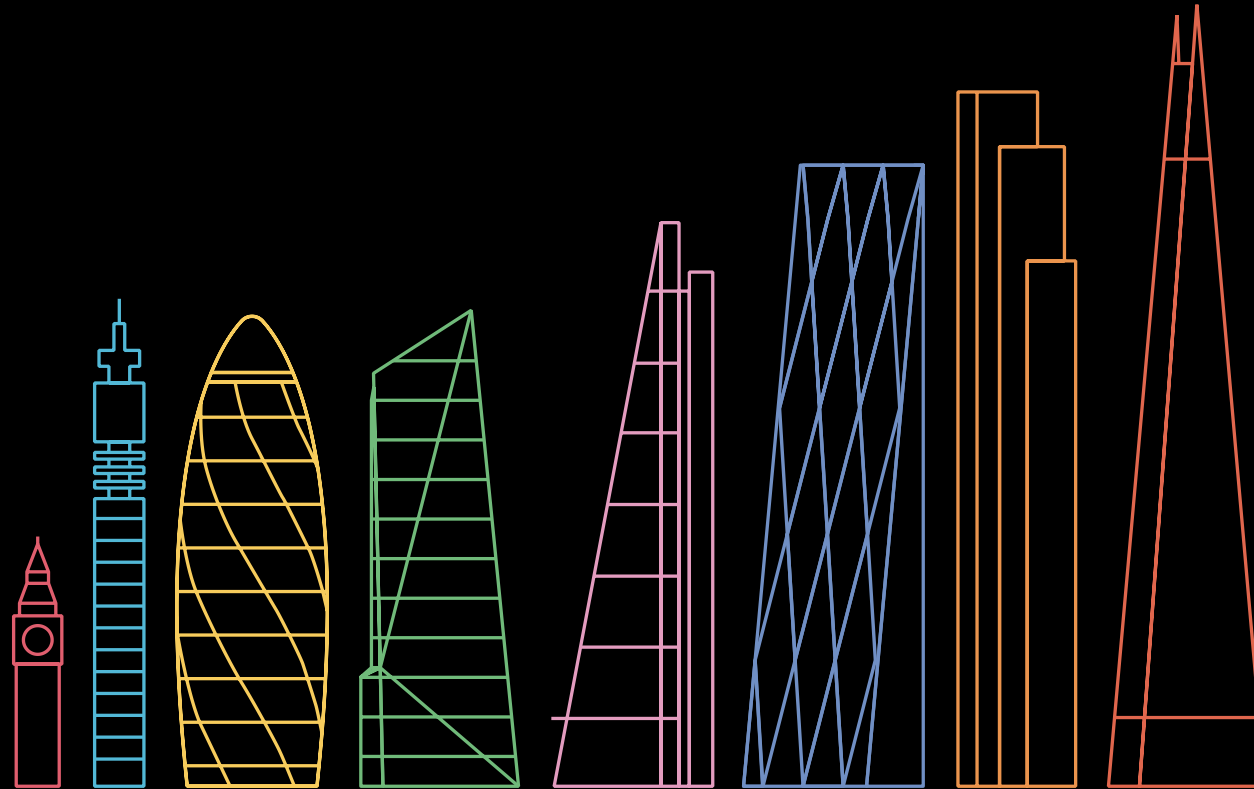




**London's built environment
community**



LONDON TALL BUILDINGS SURVEY 2025

How tall is tall?

NLA definition

Since launching in 2014, *NLA's London Tall Buildings Survey* has defined tall buildings as those of **20 storeys** or above.

The London Plan – Policy D9 tall buildings

The London Plan gives a requirement for Local Plans to define tall buildings. It set a default height of 18 metres to the floor level of the top storey or six storeys as a 'tall building' but decreed that it was up to local councils to set height limitations that were appropriate for their area and zones setting out where tall buildings would be allowed, as part of local development plans. The idea was that local debates would take place when Local Plans were being drawn up, enabling a smoother journey through planning at application stage.

Londoners' perception

For the majority of Londoners — people who work or live in London — a tall building is 'a building that is substantially higher than its surroundings.' Source: 'Attitudes towards tall buildings' survey conducted by CT group, February 2024.



How many?

The number of tall building applications has increased from last year, but permissions have decreased significantly.

Applications 2023: 47

Applications 2024:

58

Permissions 2023: 21

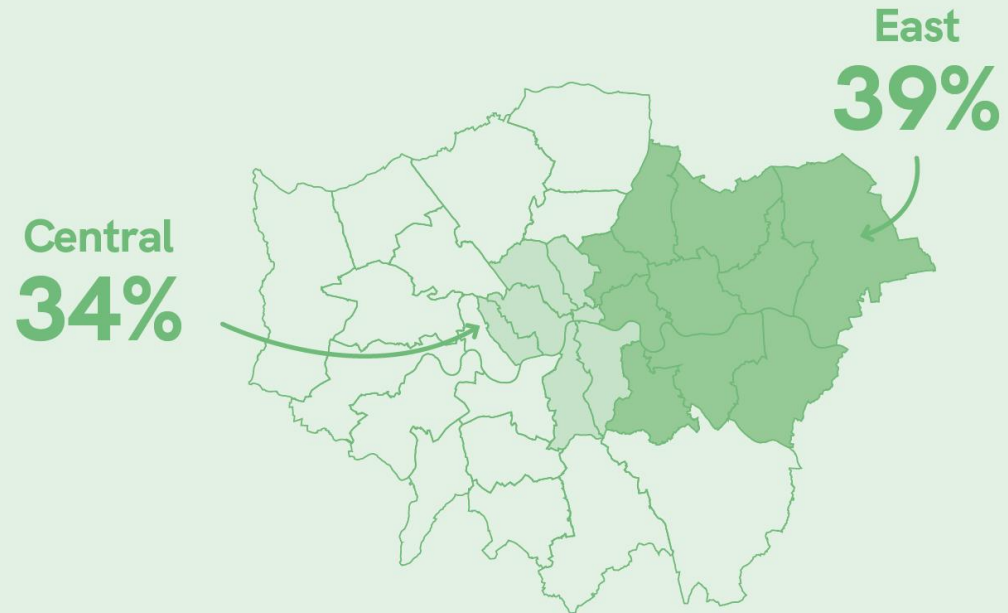
Permissions 2024:

6

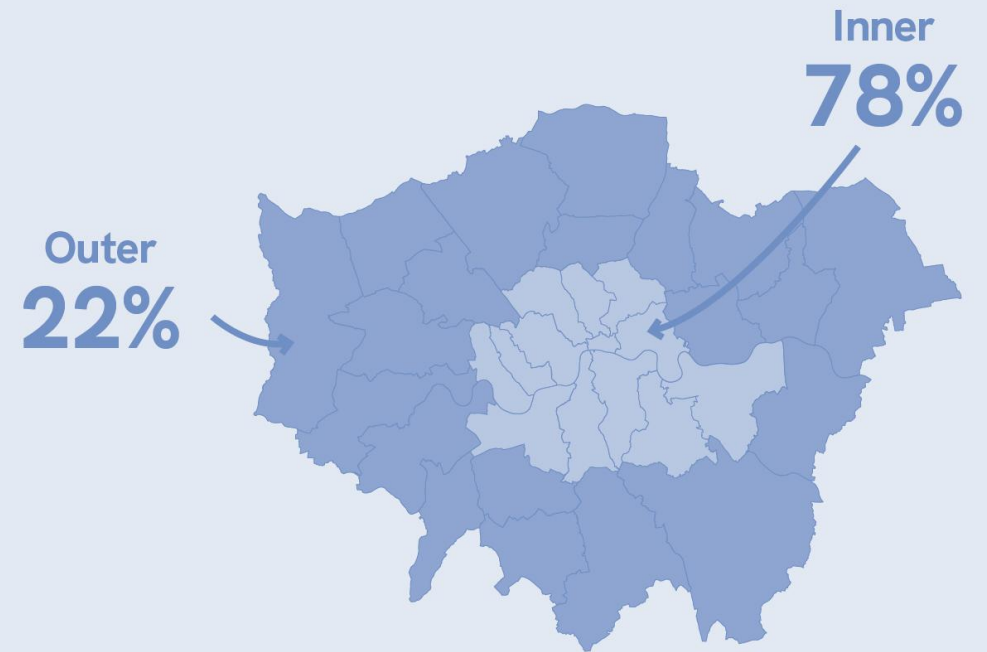


Where?

Applications across the east London boroughs remain the highest, closely followed by the central London boroughs.

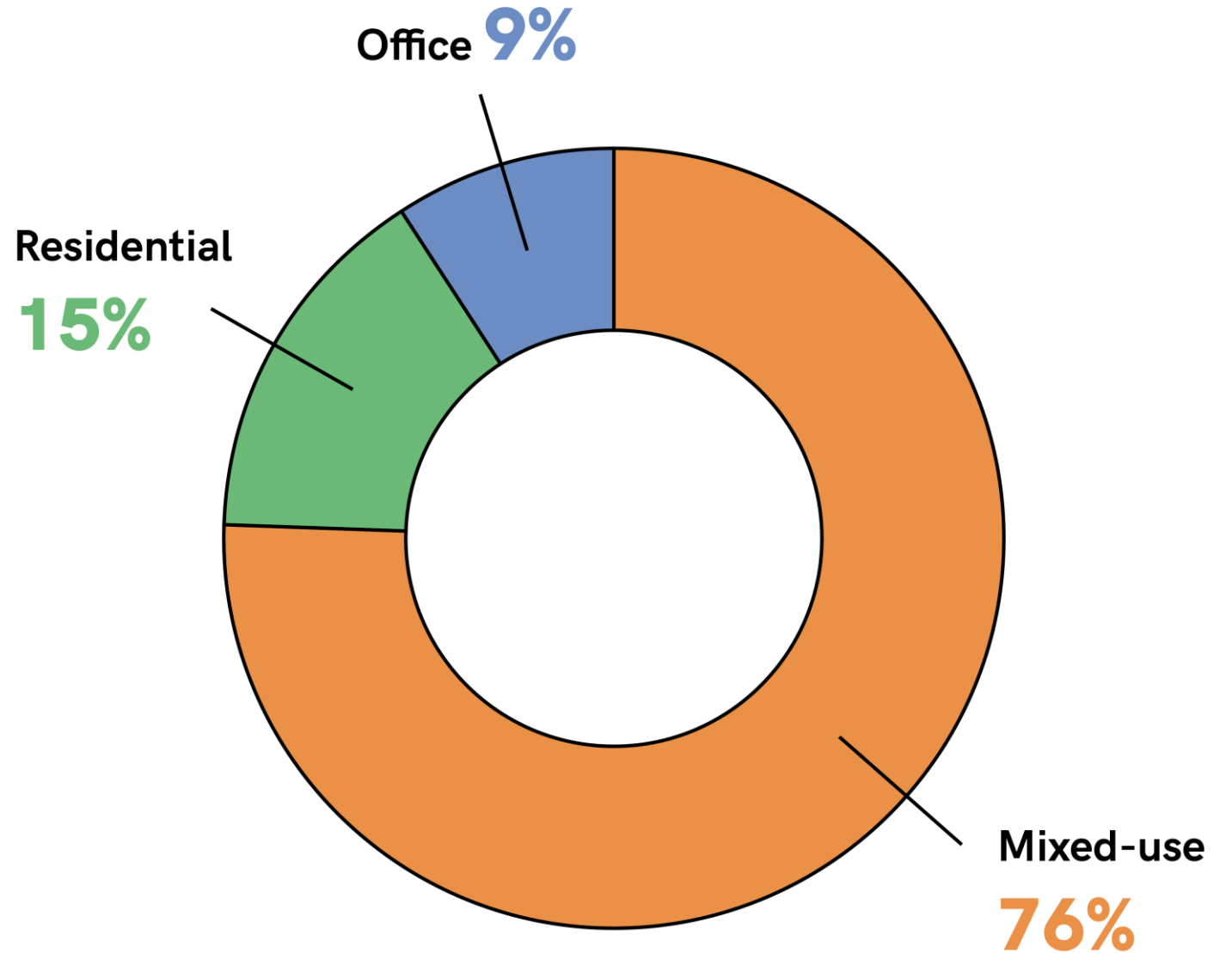


Inner boroughs have a higher number of applications than outer boroughs.



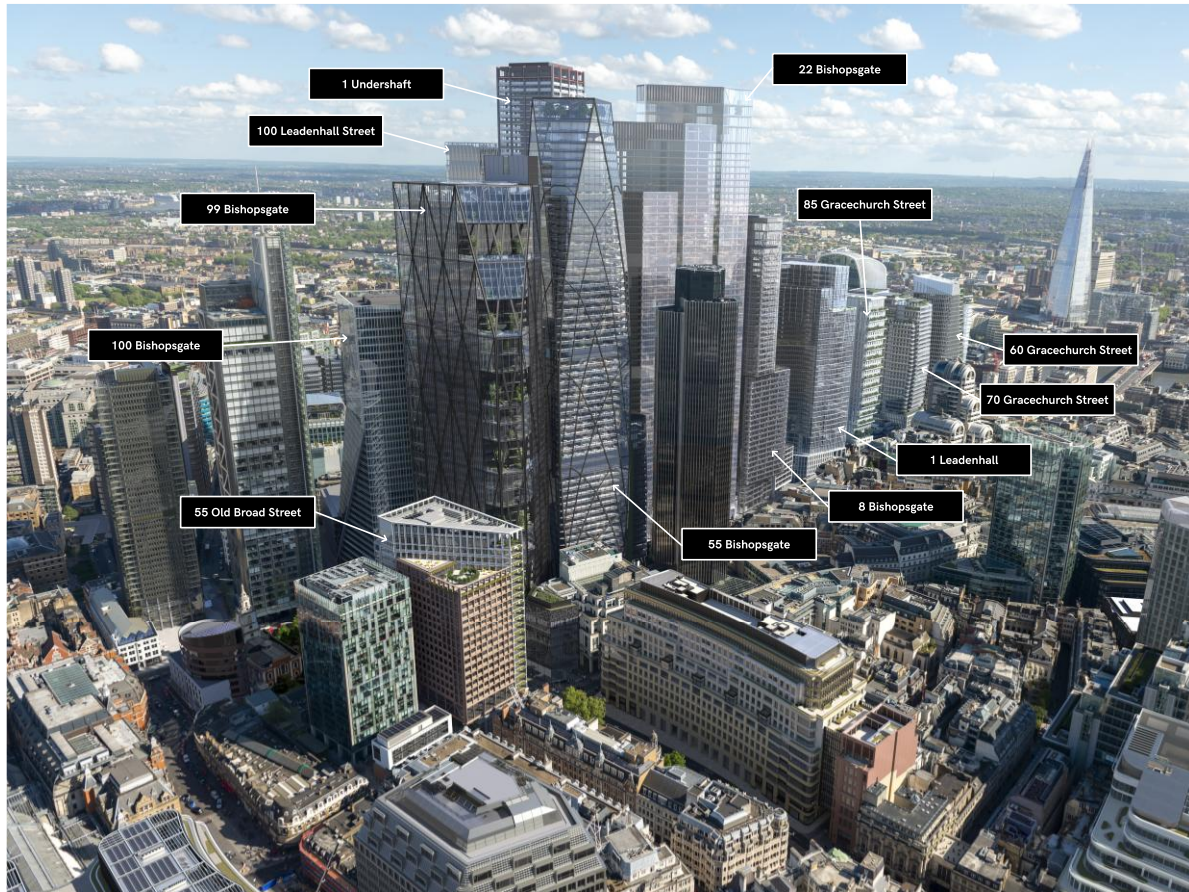
What use?

The majority of applications feature a mix of uses, while single-use developments, whether residential or office only, make up a smaller portion.



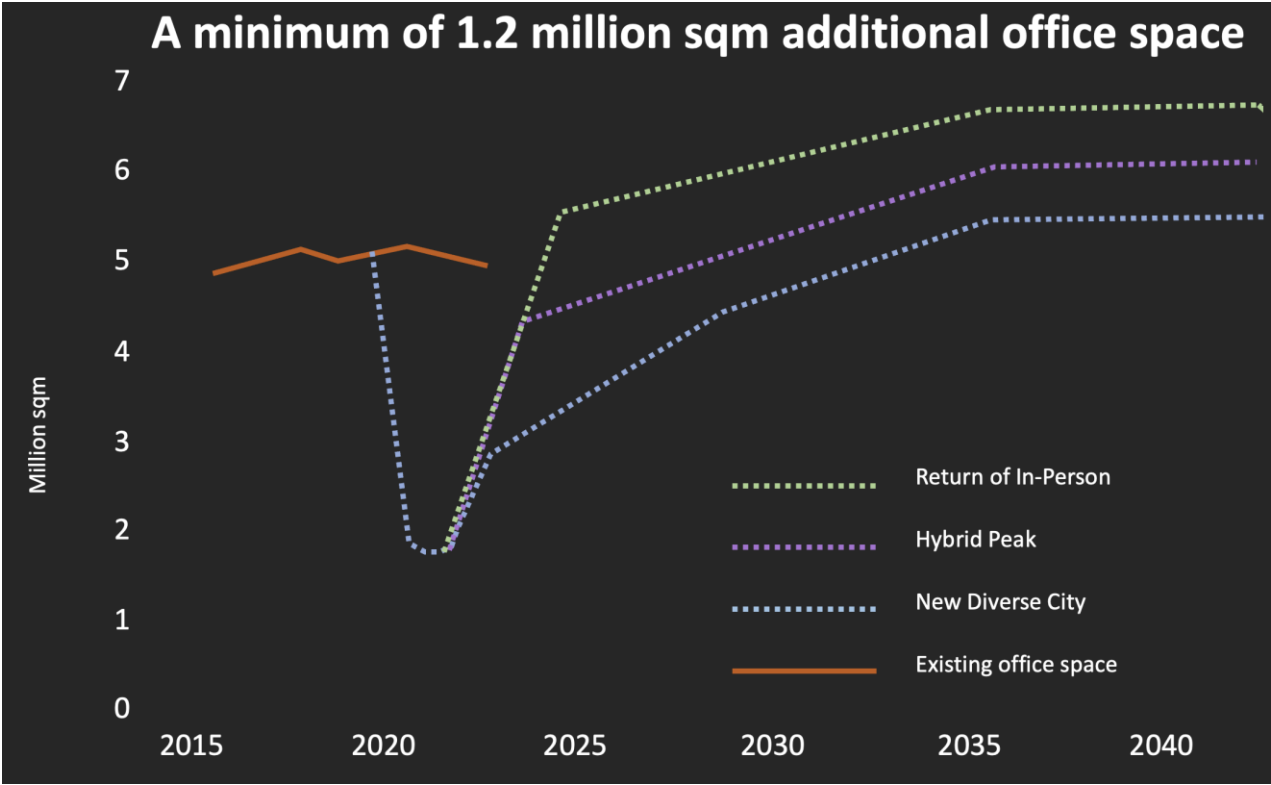
Tall Trends: A Tale of Two Cities

Commercial demand / Residential delays



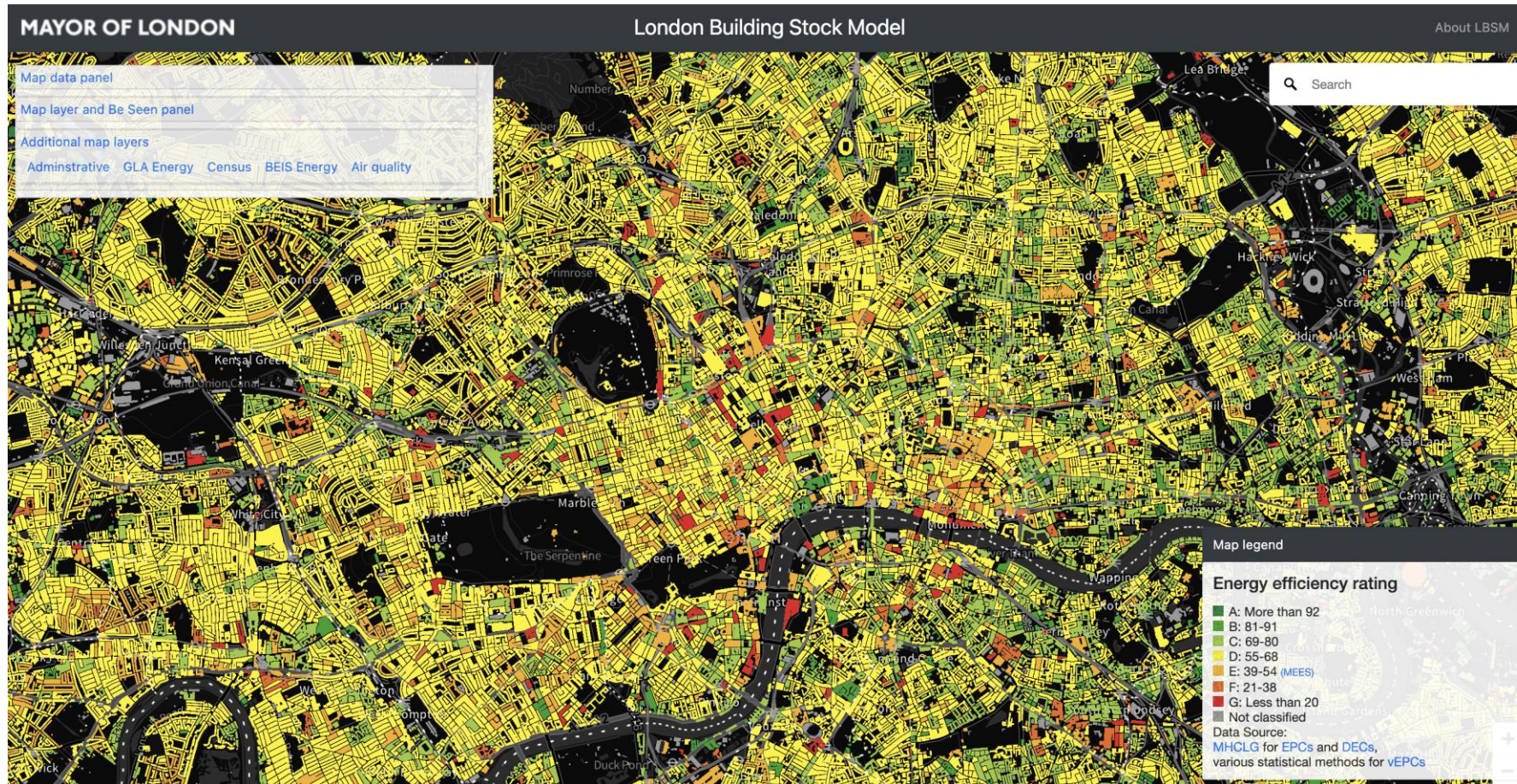
Commercial: A New Office Generation

Growth: commercial floor space needed by the City

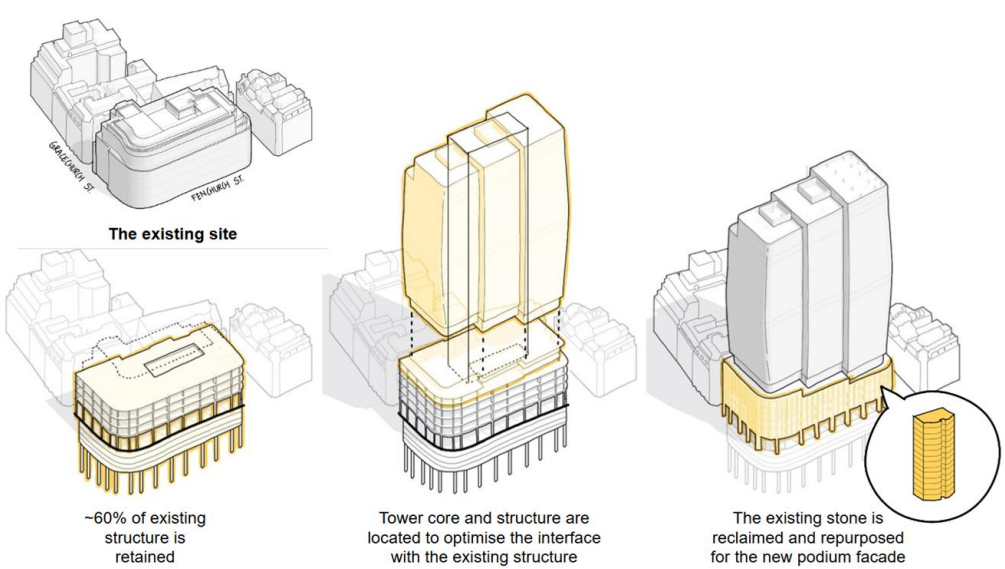






Commercial: A New Office Generation

Grade A is sustainable building: by 2030 it will be unlawful to grant a new tenancy or renew if EPC is below B. 80% currently unfit. So renew opportunity is huge!



Carbon Optioneering



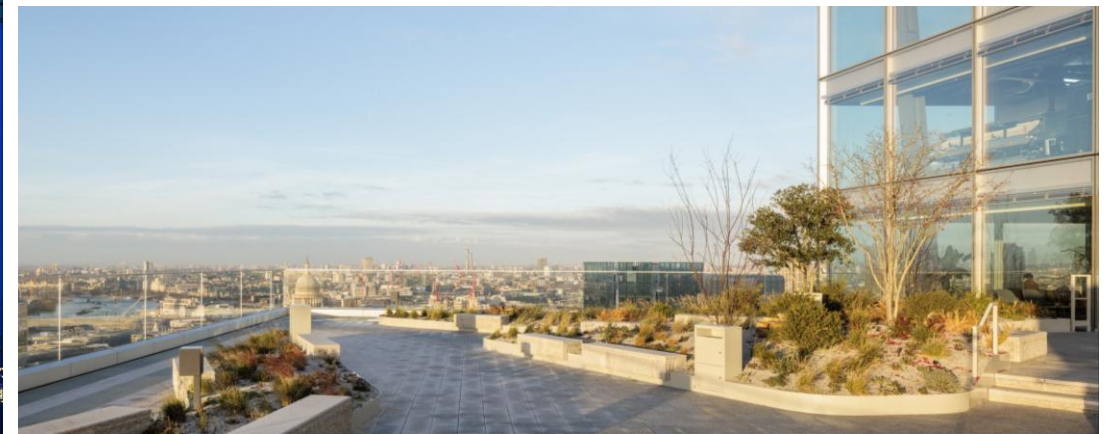
| |  |  |  |  |
|---------------------------------------|---|--|--|--|
| | Option 01 Minor Refurbishment | Option 02 Major Refurbishment | Option 03 Major Refurbishment & Extension | Option 04 New Build |
| Option Reference | B1 | B2+ | B3+ | C |
| Project Reference Period | 60 | 60 | 60 | 60 |
| Gross Internal Area (GIA) m² | 25,264 | 43,879 | 50,647 | 50,834 |
| Net Internal Area (NIA) m² | 12,958 | 25,762 | 27,283 | 28,207 |
| Change to NIA compared to existing m² | 1,185 | 13,989 | 15,510 | 16,434 |
| Substructure % retained by mass | 100 | 99 | 93 | 91 |
| Superstructure % retained by mass | 90 | 46 | 32 | 0 |



Commercial: A New Office Generation

More outdoor: terraces and balconies
adding extra space (cost but value)

Activation amenities: a demand for a
richer mix of uses, cultural activations, and
space programming



Residential: construction stalled

- Delays in Gateway system with the new BSA
- Back to the drawing board: Two staircase
- Pushing things up? A combination of factors, including high build costs, rising land values, and Section 106 contributions encourage taller development?
- So stick to below 6 storeys and make it dense, or punch way up high passed the 20 storeys to make it work financially



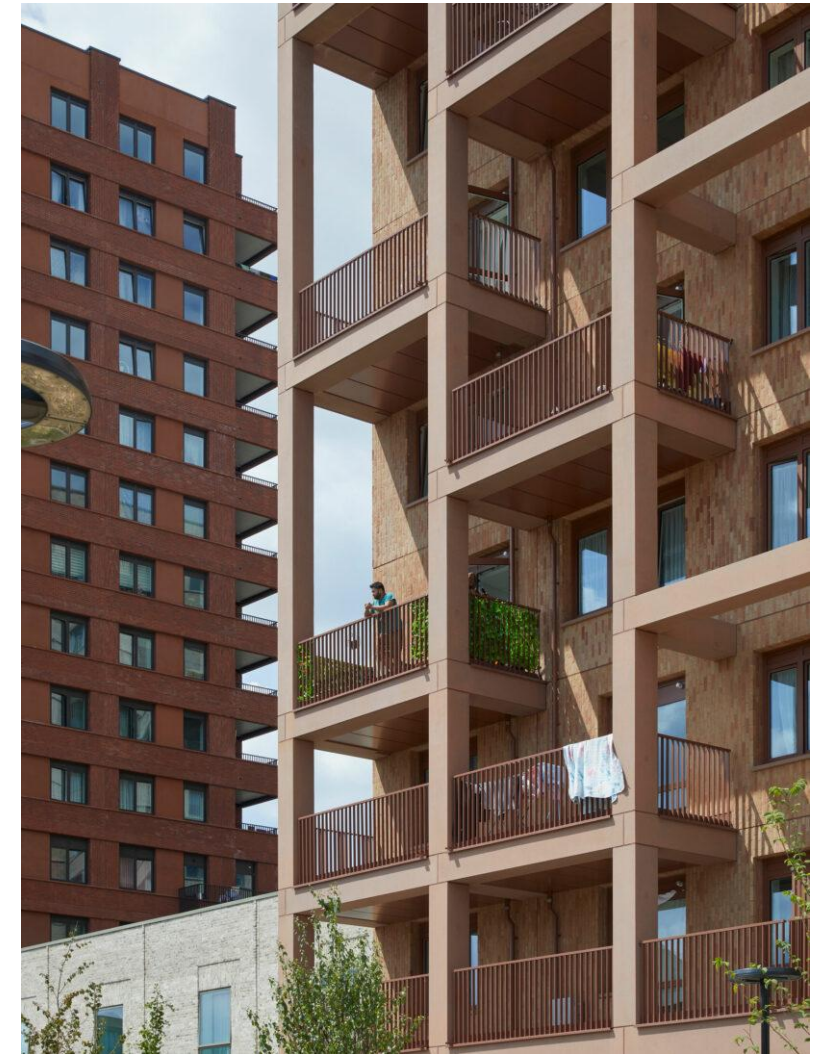
Residential: driving the market

- PBSA, Co-living, BTR driving the resi sector
- The hopes that the alternative housing' will free family size lower rise homes, but there's not evidence of that
- Interesting MMC examples



Residential: lived experience

We need more research on lived experience



NLA Expert Panel on Tall Buildings

Chair: Joanna Bacon, Allies and Morrison

David Isherwood, Lockton Companies LLP

Aulikki Sonntag, Staticus Schweiz AG

Brian Smith, AECOM

Kye Taylor, Multiplex

Michael Forrester, London Borough of
Lewisham

Neal Shah, Greystar

Reinhold Schmaderer, Howells

Stuart Marsh, SOM

Danny Brumby, Otis

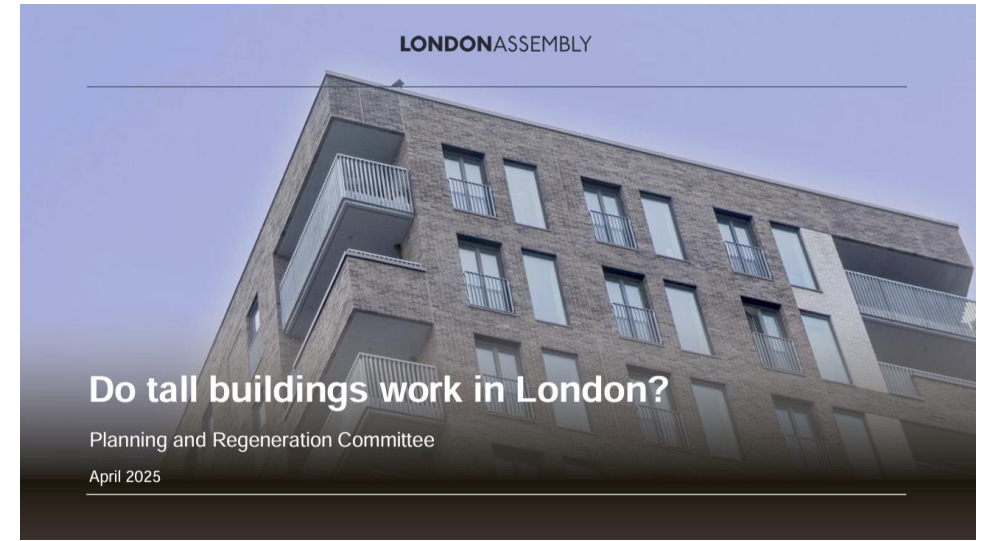
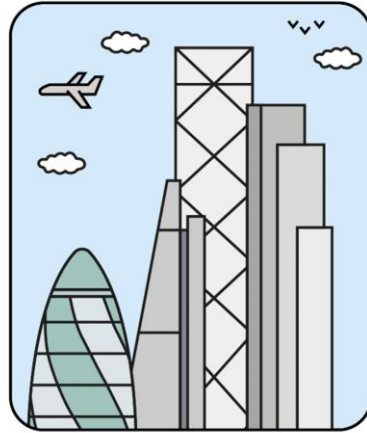
Earle Arney, AFK

Claire Brady, Historic England

Audrey McIver, WSP

Dalibor Savovic, DeSimone

Rob McNicol, City of London Corporation



LONDONASSEMBLY

Executive summary [2]

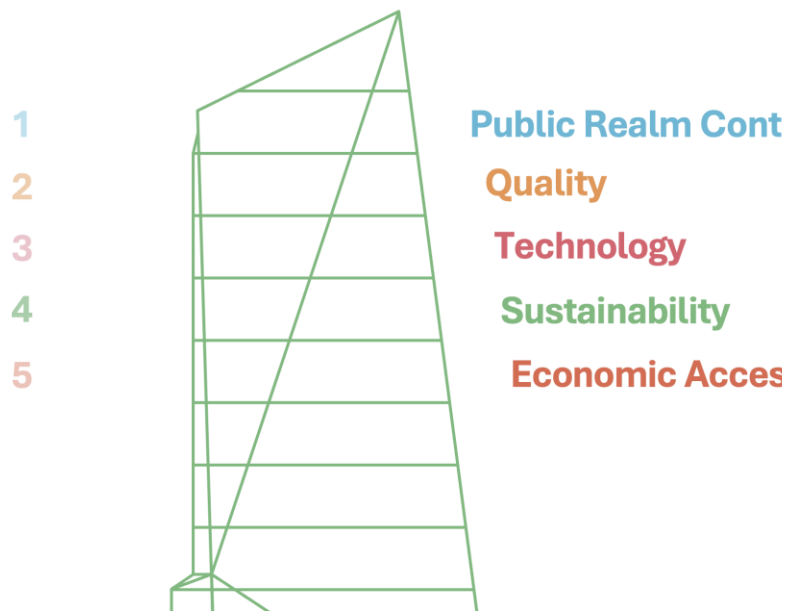
Currently, we fear that the tall residential buildings being constructed in London are not always delivering against these criteria. We are also concerned that fundamentally there is an absence of definitive analysis of what a successful tall building looks like. Accordingly, as part of the GLA's work to prepare a new London Plan, we want to see the GLA carry out assessments of:

- what mixture of housing typologies London needs as part of its Strategic Housing Market Assessment (SHMA).
- how tall buildings are driving increasing land values as part of its Strategic Housing Land Availability Assessment (SHLAA).
- the whole-life carbon impacts of tall buildings and how they fit with sustainability goals of the London Plan.

Two photographs showing people in a meeting room. The top photo shows a group of people sitting around a table, looking at a large architectural model of a city. The bottom photo shows a man standing and pointing at the same architectural model, with other people standing and looking at it.

Standing the Test of Time

Performance Criteria



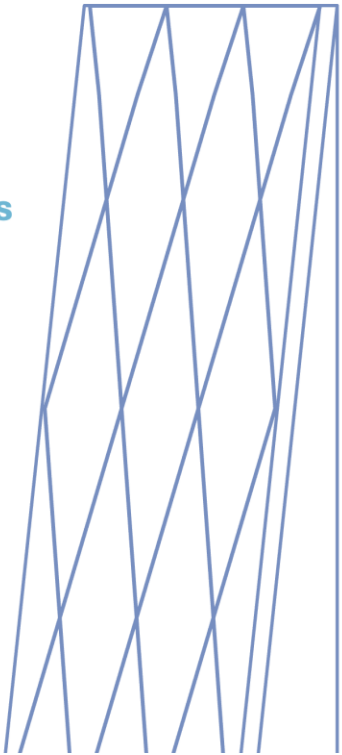
NLA Tall Buildings Group 48 projects reviewed:

12 New Build
Residential Projects
Completed and occupied
more than 12 months ago

12 New Build
Office Projects
Completed and occupied
more than 12 months ago

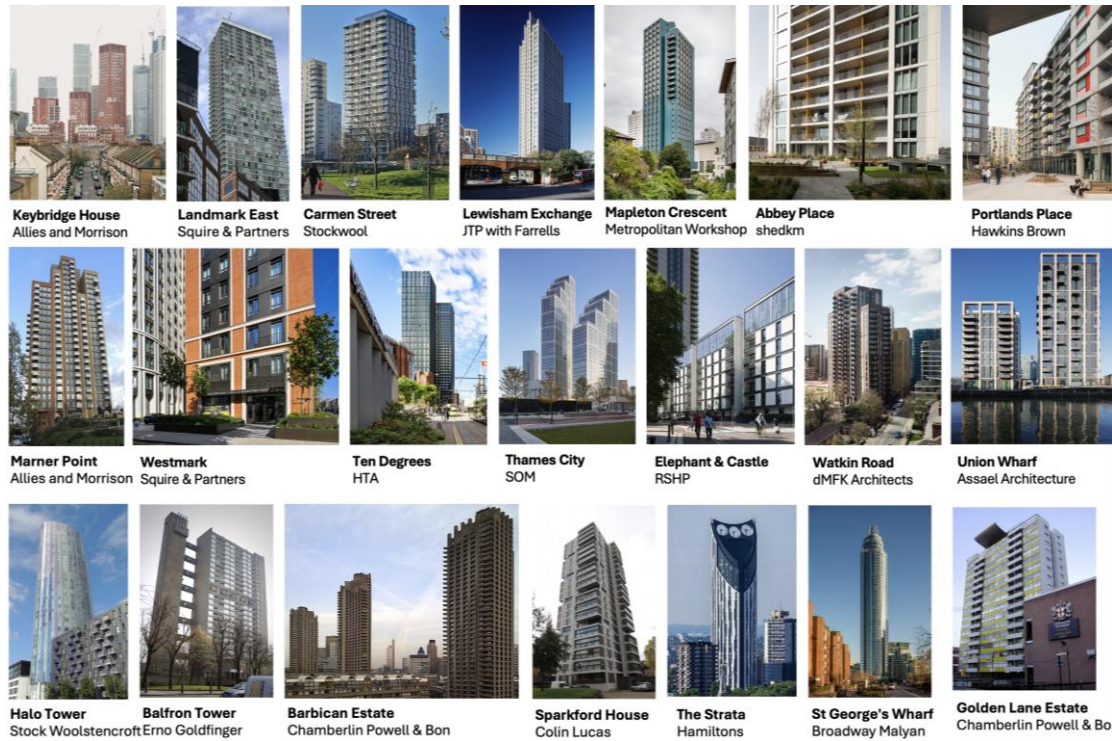
12 Test of Time
Residential Projects
Completed and occupied
more than 10 years ago

12 Test of Time
Office Projects
Completed and occupied
more than 10 years ago



Standing the Test of Time

Residential



Commercial





Thank you!

Join us!

