

Slides from Just Space October 3rd
presentation on the Draft London Plan

Draft new LONDON PLAN 2026



An aerial photograph of London, showing a dense green park in the foreground with several houses, and the city skyline in the background under a blue sky with light clouds.

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DRAFT LONDON PLAN

The Spatial Development Strategy
for Greater London

2026

An aerial photograph of London, showing a dense green park in the foreground with several houses, and the city skyline in the background under a blue sky with light clouds.

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2026 London Strategic
Housing Land Availability
Assessment (SHLAA)

Its supporting
documents....

September 2026

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London Strategic Housing Market Assessment
Part of the evidence base of the London Plan
2026

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2026 London Strategic Housing Land Availability Assessment (SHLAA)

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2026 London Strategic Housing Land Availability Assessment (SHLAA)

Strategic Housing Market Assessment Addendum

1. This note serves as an addendum to the Strategic Housing Market Assessment (SHMA) to inform and support planning for the Mayoral housing target of 55,800 homes.
2. It first discusses how and why the SHMA methodology has been adapted to fit a 'fixed' target and then provides the bedroom size and tenure breakdown for the new target.
3. The SHMA provides evidence on housing need in London. It forms part of the evidence base of the 2026 London Plan. It contains contextual information on demographics, housing supply and market conditions, and an analysis of housing requirement in the plan period broken down by bedroom size and tenure.
4. The SHMA uses multiple methodologies to tackle this, including the Demographic Projection Based Method and the Standard Method. At the time of writing, the Standard Method provides a headline scenario of c85-89,000 homes per year. The Demographic Projection Based Method provides breakdowns of tenure and bedroom size need.
5. The SHMA is an unconstrained assessment of need – it looks at achieving a minimum acceptable level of housing standard to all Londoners at a housing requirement of c85-89,000 homes per year. However, the housing targets set in the London Plan have to respect other pieces of evidence, in particular the Strategic Housing Land Availability Assessment (SHLAA) and viability assessment. These moderate the headline need figure of the SHMA, and establish a housing target of 55,800 homes (as of June 2026).
6. For the London Plan, we require evidence on the bedroom size and tenure breakdown of this new target. In a scenario where 55,800 homes are built annually, a different mix of households form than in the headline SHMA scenario where 89,000 homes are assumed to be built annually. This means that the same breakdowns of bedroom size and need are not applicable.
7. Therefore, we developed a modified SHMA methodology that answers the question: "given an annual number of new homes, what tenure and size mix best meets the needs of Londoners?"
8. In the SHMA Demographic Projection Based Method, the final housing requirement figure is determined by a handful of factors:
 - a) The demographic projection based method, how many new households form
 - b) The household formation rates (i.e. for a given growth in a subset of the population, how many new households form)
 - c) The empty homes rate
 - d) The backlog
9. Factors a, c and d above are fixed across scenarios. The household formation rates can be adjusted by a factor x (allowing more or fewer households to form than the historic baseline) such that the overall number of homes required matches a given number (in this case 55,800). Running the microsimulation,

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December 2025

Travel in London 2025
Annual overview

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London Strategic Housing Market Assessment Part of the evidence base of the London Plan 2026

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2026

December 2025

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Mayor's Transport Strategy
MARCH 2018

Travel in London 2025
Annual overview

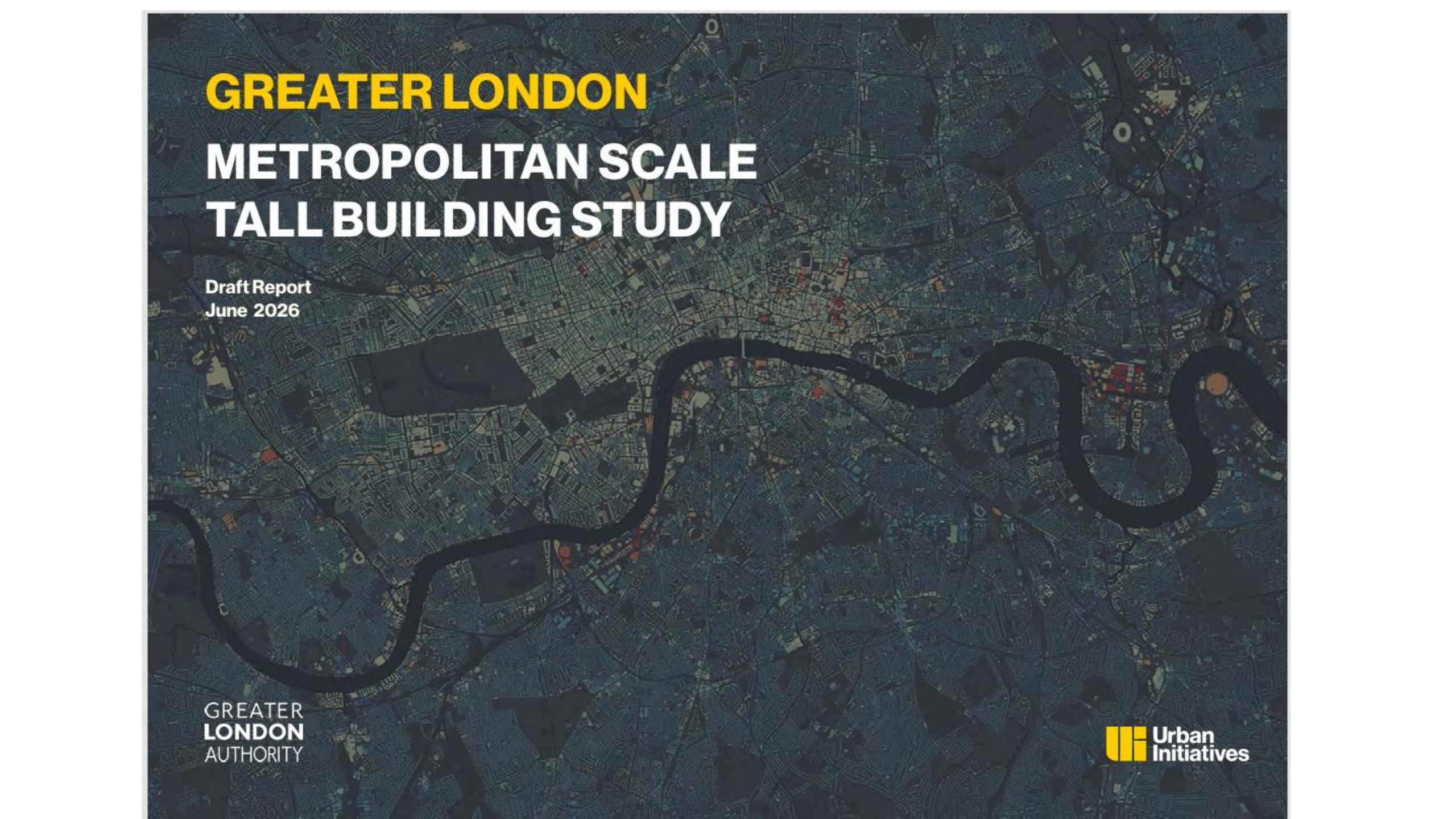
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The Spatial Development
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2026



Travel in London 2025
Annual overview



GREATER LONDON **METROPOLITAN SCALE** **TALL BUILDING STUDY**

Draft Report
June 2026

GREATER
LONDON
AUTHORITY

 **Urban
Initiatives**

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London Plan Guidance

London View Management Framework

Consultation Draft

September 2026

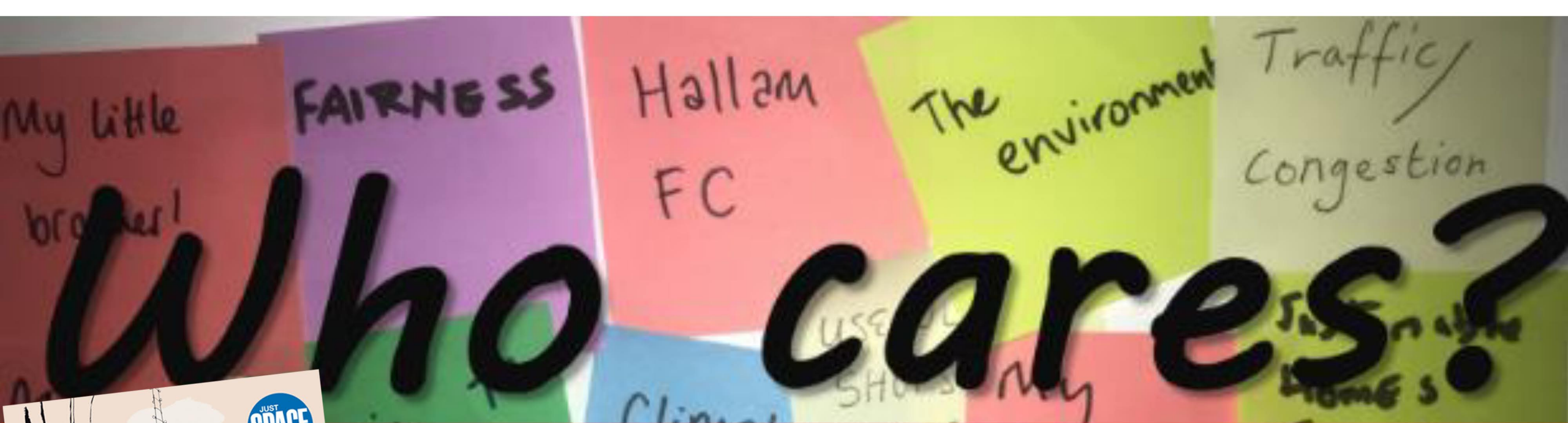
An aerial photograph of London, showing a dense green forest in the foreground and middle ground, with the city skyline visible in the background under a blue sky with light clouds. The text is overlaid on the image.

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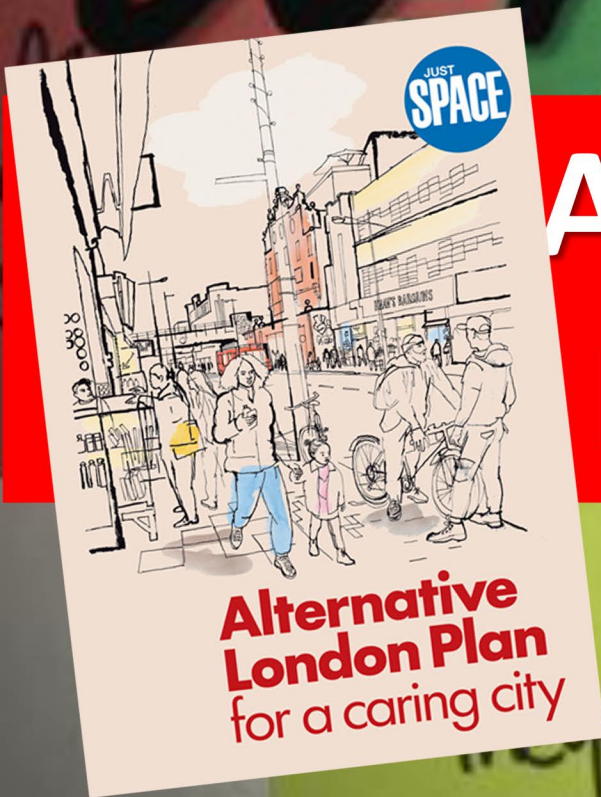
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for Greater London

2026



An Alternative London Plan for a Caring City



1 September 2026

Location	Change
Paragraph 3.7, final sentence	The overall percentage has been updated to 66 percent from 60 percent, to reflect the numerical changes below.
HN3A.(2)	The number of low-cost rent homes has been updated from 219,940 to 238,430 and the number of intermediate homes has been updated from 119,940 to 129,020. These changes reflect the need set out in Table 2 of the SHMA addendum.
HN3B.(2)	The number of low-cost rent homes has been updated from 219,940 to 238,430 and the number of intermediate homes has been updated from 119,940 to 129,020. These changes reflect the need set out in Table 2 of the SHMA addendum.

11 September 2026

Updates as below to Table 3.1 to correct an error affecting the brownfield housing targets for 10 local planning authorities. This correction relates to a GIS error in the mapping of industrial land that was used to identify the housing capacity by local planning authority from industrial land release. These corrections reflect the correct attribution of sites for additional industrial release to local planning authorities. These corrections do not alter the London total housing target of 558,451 or the methodology used to determine local planning authority housing targets.

Correct figures in **bold**.

Local Planning Authority	Brownfield housing target	Total housing target
Barnet	25,730 25,849	32,730 32,849
Bromley	7,507 8,283	7,507 8,283
Ealing	32,054 31,979	32,054 31,979
Hackney	10,584 10,582	10,584 10,582
Hammersmith & Fulham	16,784 16,859	16,784 16,859
Haringey	19,030 18,911	19,030 18,911
Lewisham	14,052 13,276	14,052 13,276
Merton	14,272 17,455	14,272 17,455
Waltham Forest	19,070 19,072	19,070 19,072
Wandsworth	26,609 23,426	26,609 23,426

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Good Growth

2019/21

- ~~1. Building strong and inclusive communities~~
2. Making the best use of land
3. Creating a healthy city
4. Delivering the homes Londoners need
5. Growing a good economy
6. Increasing efficiency and resilience

2026

1. Making the best use of land
2. Delivering the homes and neighbourhoods Londoners need
3. Growing London's economy in a way that benefits all
4. Creating a greener, resilient and healthy city

~~Building Strong and Inclusive Communities~~

“Good growth is inclusive growth. To build on the city’s tradition of openness, diversity and equality, and help deliver strong and inclusive communities, those involved in planning and development must:

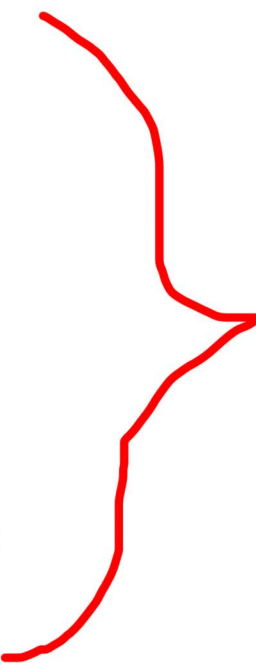
A) encourage early and inclusive engagement with stakeholders, including local communities...

C) provide access to good quality community spaces, services, amenities and infrastructure that accommodate, encourage and strengthen communities...

...D, E, F, G, H

Lest we forget

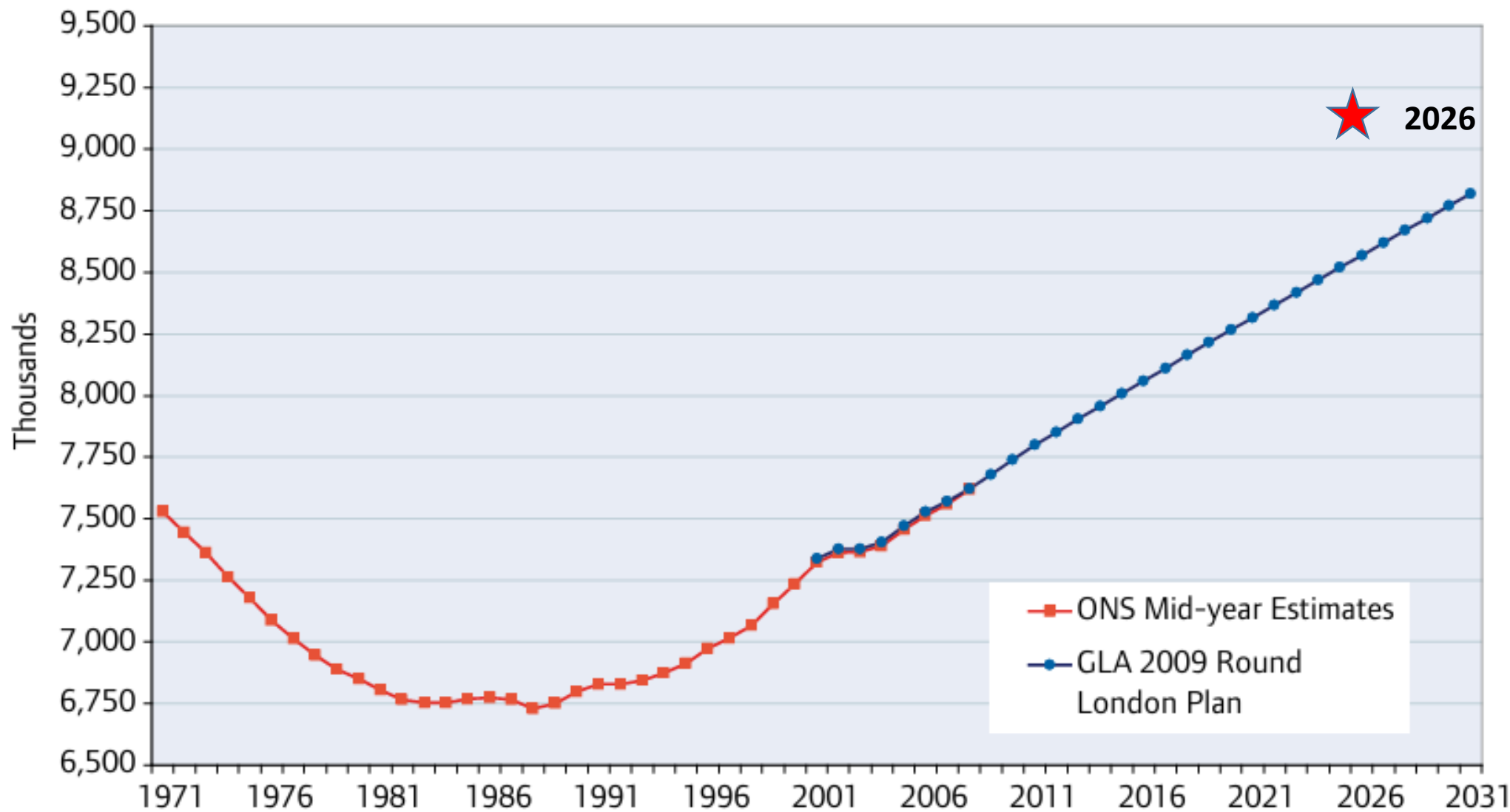
- ~~Inclusive engagement~~
- ~~Inclusive growth~~
- ~~good quality community spaces~~
- ~~community spaces~~
- ~~strengthen communities~~
- ~~Openness, diversity and equality~~
- ~~Diversity and equality~~



removed from the
2026 Draft Plan

- Diversity (mentioned twice: diversity of housing mix; diversity of own centres)
- inclusive communities (mentioned once: HN7 Housing size mix)

Figure 1.2 London's population 1971-2031



Source: Greater London Authority DMAG

Housing targets

• London Plan 2004	23,000 additional new homes p.a.
• London Plan 2011	32,000 (“not a target”)
• FALP 2016	42,000
• London Plan 2021	52,000
• Govt 2025	88,000
• London Plan 2026	55,800

Housing policies expressly fail to meet the numbers of genuinely affordable homes needed (in SHMA) = 65% of 55,800

Why? Housing crisis... or housing affordability crisis

Why?

- 90,000 homeless children
- London's councils spending £2bn annually on temporary accommodation... going bust
- Housing crisis?...
- ...or housing affordability crisis?
- OBR: more homes won't bring down house prices significantly
- Centre for London: more residential space built than population increased over past 30 years
- Renter's Rights etc: rent controls
- Shelter: massive council housebuilding programme
- Centre for Cities: 4m missing homes because of Planning... build, baby, build (Developer-sponsored lobby group)

Where should growth go?

- London Plan 2004– 28 Opportunity Areas
- London Plan 2011 – 33 Opportunity Areas
- FALP 2016 – 38 OAs + town centres
- London Plan 2021 - 48 OAs + town centres
- London Plan 2026 – everywhere...

=> Densification becomes the central purpose of policy

Figure 2.4 The Sustainable Access Measure (SAM)

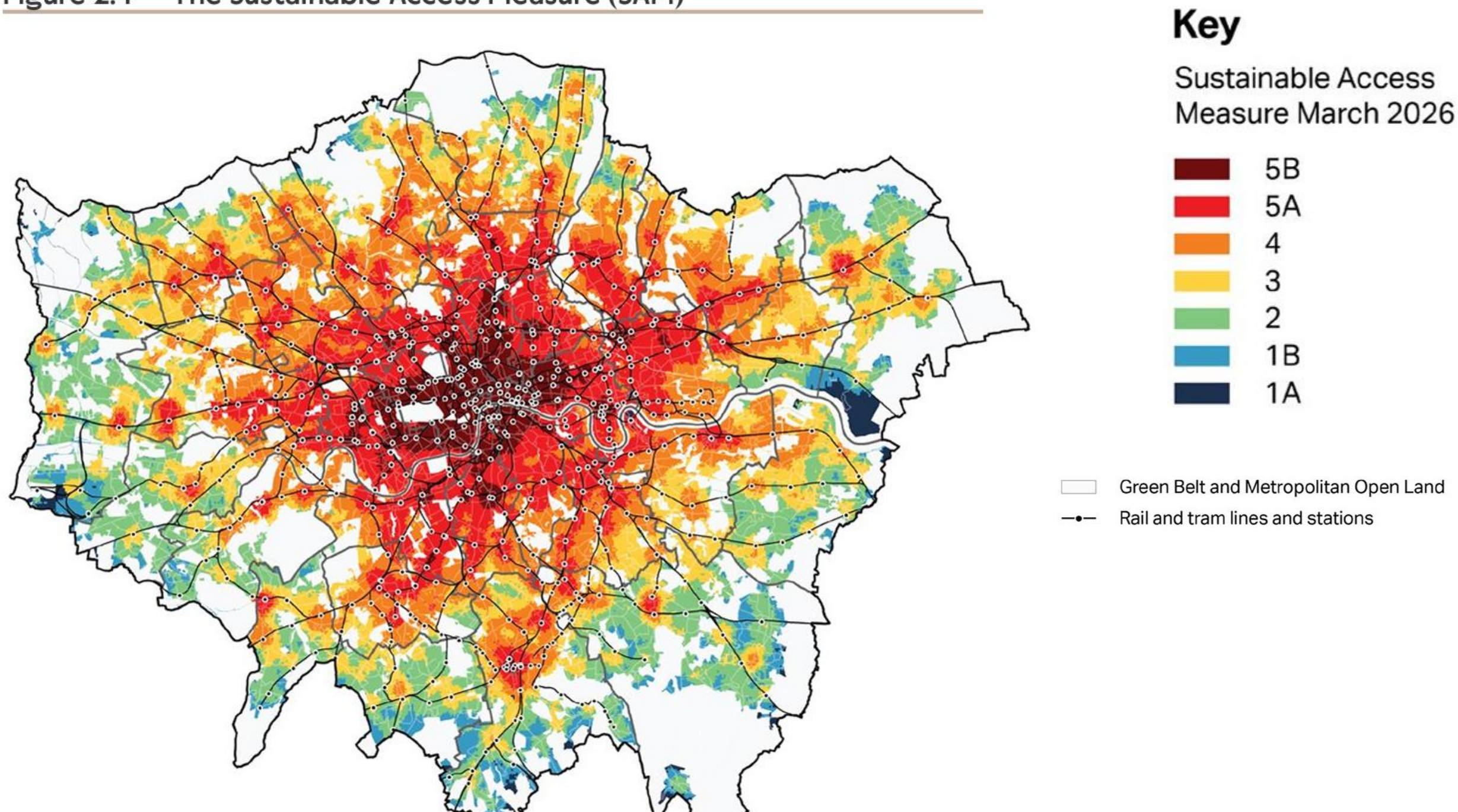


Figure 2.5 London Context Map

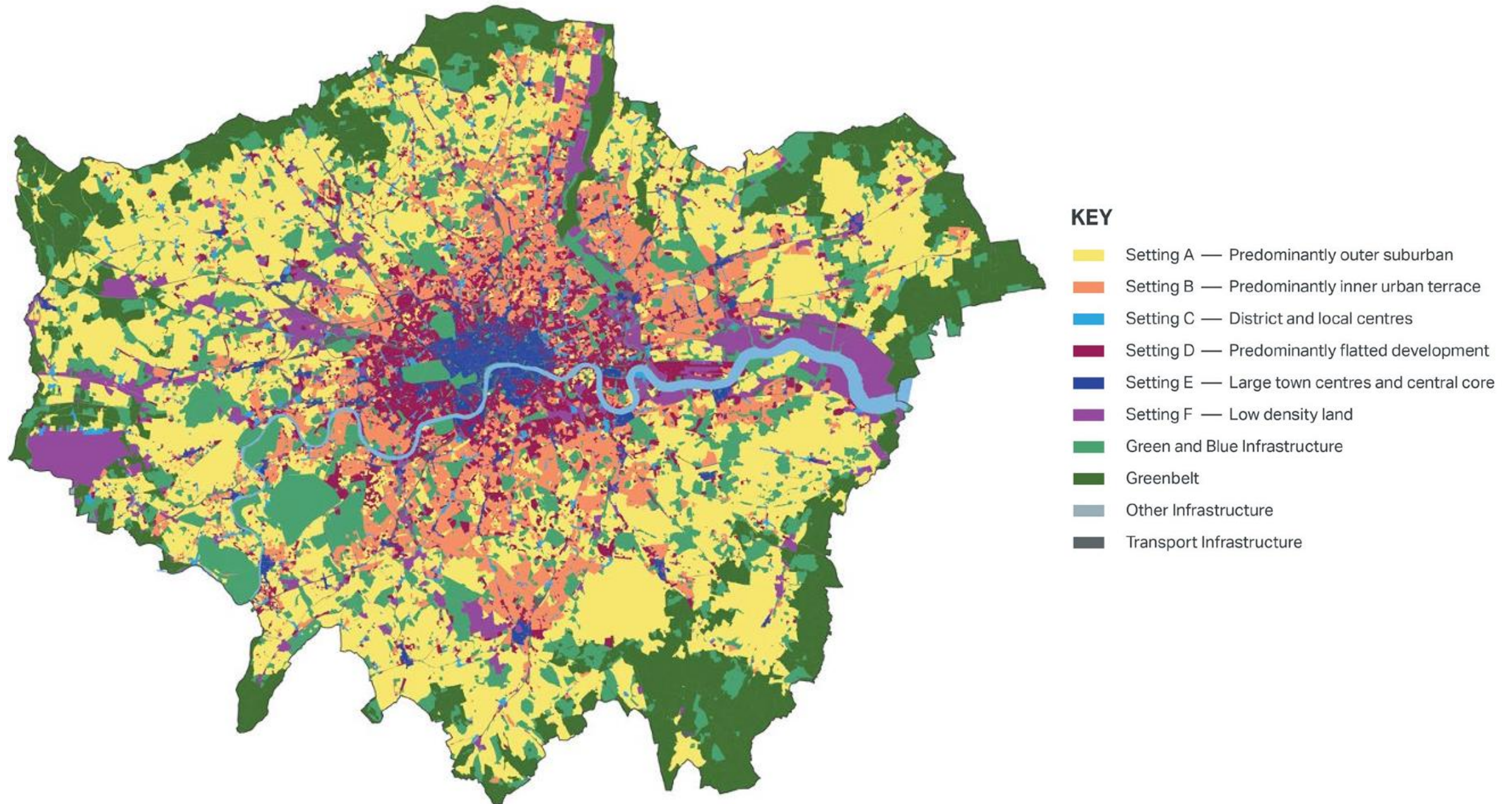


Table 2.1 Optimisation Framework

Context Setting	SAM 2	SAM 3	SAM 4	SAM 5A	SAM 5B
Setting A	3 - 4 storeys 220 - 410 hr/h	3 - 5 storeys 280 - 510 hr/h	3 - 6 storeys 340 - 610 hr/h	3 - 7 storeys 440 - 750 hr/h	4 - 7 storeys 500 - 830 hr/h
Setting B	3 - 5 storeys 260 - 480 hr/h	3 - 6 storeys 330 - 580 hr/h	3 - 7 storeys 400 - 680 hr/h	4 - 7 storeys 500 - 830 hr/h	4 - 8 storeys 510 - 910 hr/h
Setting C	3 - 5 storeys 300 - 530 hr/h	3 - 6 storeys 370 - 640 hr/h	3 - 7 storeys 440 - 750 hr/h	4 - 8 storeys 490 - 900 hr/h	5 - 9 storeys 550 - 990 hr/h

Setting					
Setting D	3 - 6 storeys 370 - 650 hr/h	4 - 7 storeys 420 - 760 hr/h	4 - 8 storeys 470 - 880 hr/h	5 - 9 storeys 590 - 1040 hr/h	5 - 10 storeys 600 - 1130 hr/h
Setting E	4 - 7 storeys 420 - 710 hr/h	4 - 8 storeys 440-830 hr/h	5 - 9 storeys 490 - 950 hr/h	5 - 10 storeys 550 - 1080 hr/h	5 - 11 storeys 610 - 1170 hr/h
Setting F	4 - 8 storeys 450 - 830 hr/h	5 - 9 storeys 520 - 950 hr/h	5 - 10 storeys 560 - 1080 hr/h	5 - 11 storeys 650 - 1220 hr/h	5 - 12 storeys 650 - 1300 hr/h

Figure 3.2 Locational bands for the Threshold Approach



KEY

- Location Band A - 35%
- Location Band B - 25%
- Location Band C - 20%

STRATEGIC?

SHMA: 65% of all 558,000 homes should be genuinely affordable

Strategic target = 50% affordable

Public land target = 40%

Outer London = 20%

The strategic target is not possible!

Viability and deliverability

“The principal viability challenge remains the relationship between development values, construction costs, finance costs and sales absorption rates, particularly for taller development in lower value areas. As such, reducing individual policy requirements would have only a limited effect in many cases and would not fundamentally alter the current viability position...” (SHLAA 6.15).

SHLAA Table 6-1 shows that lower-scale development is more viable

+ affordable housing makes schemes more deliverable!

Yet the approach continues to push for tall buildings and more market housing, and seeks to make savings through policy requirements

Where will this get us?

- Homelessness continues to rise
- Waiting lists lengthen
- More land wasted on unaffordable market homes and/or
- Housebuilding grinds to a halt
- Government brings back Help to Buy...
- House prices and rents rise
- Homelessness continues to rise
- Etc
- Impact on all other elements of London Plan policy...

Some good
news...

Comfort break!!

Then get into topic groups

Topic groups

- **Housing:** densification, tall buildings v mid-rise, type and tenure
- **Local economy:** loss of industrial land, affordable workspace, shops and town centres, street markets, CAZ
- **Equalities,** participation, inclusion
- **Environment:** open space protections removed, carbon assessments, healthy air, biodiversity, data centres
- **Lifetime neighbourhoods:** communities, community facilities, audits, intergenerational spaces, food access and security, health impacts
- **Transport:** polycentric London, aviation, buses, cycleways,

Lunch!