

Party conference season, London’s ageing demographic, London’s Office market & GLA Green Belt research



Account of the London Planning and Development Forum meeting on Tuesday 16 September 2025 at the London School of Economics

Discussion topics

I Party conference season

Is the government risking electoral defeat if it ignores local views on its growth plans?

“Unless ministers find a way to balance delivery with democratic legitimacy, they may find their planning reforms have not only reshaped the built environment - but the electoral map as well” – Victoria Yeandle.

Speaker: **Victoria Yeandle**, Associate Planner, Lanpro

II London’s ageing demographic

Speaker: **Christine Whitehead**, LSE Emeritus Professor of Housing Economics

Speaker: **Les Mayhew**, Professor of Statistics, Bayes Business School & Chairman of the Mayhew Review

III London’s Office market – a longer view

“We’re still oriented towards yet more office growth in central London, preferably in buildings as tall as possible according to the City of London Plan. Does that still make sense post-Covid? Will we return to a London office market at pre-Covid levels of activity or is the need now for more dispersed, remote work options across London (and beyond)?” – Brian Whiteley

Speaker: **GLA Gudrun Andrews**, planning policy lead at the City Corporation

Speaker: **Shabab Qadar**, head of London offices research Knight Frank

IV GLA Green Belt research and SME developers

“Nearly 5 years ago I worked with Lichfields to publish some hard hitting research on the challenges facing smaller sites and smaller developers (under one hundred homes). The main challenges: - the viability ask, planning treats smaller sites the same as majors - they take too long to be determined - they become the play thing of nimbys. Five years on the situation has deteriorated. As a industry we have failed to make the case and successive Governments have failed to act.” – Nick Cuff

Speaker: **Alex Scarriatta**, Group Land Director, Richborough

Report by **Riette Oousthuizen** of HTA Design also at www.planninginlondon.com >LPDF

Party Conference Season

Is the government risking electoral defeat if it ignores local views in its growth plan?

1. Party Conference Season:

Speaker: **Victoria Yeandle**, Lanpro

Background: Consultancy involving Planning, Design, and Environment

The presentation addressed electoral shifts and its relationship to devolution. The government has established a national target of 1.5 million homes, with particular focus on developing ‘grey belt’ land.

Government Initiatives

- New Towns Taskforce
- National Scheme of Delegation
- English Devolution Bill

Strategic Authority Powers

The government proposes creating additional powers for Strategic Authorities, in the English Devolution and Community Empowerment Bill, including:

- Newly elected mayors gaining ability to prepare Spatial Development Strategies (SDS), similar to the London Mayor
- Mayoral powers to raise Community Infrastructure Levy (CIL) and determine planning applications

Key Question: Political Viability of Devolution

Case Study: *Ramsey, Huntingdonshire*

The discussion centered on whether a top-down approach from strategic authorities could succeed, in particular due to a unique mix of party affiliation across elected officials and how that affects strategic collaboration.

ATTENDANCE Meeting held on Tuesday 16 September 2025 at the London School of Economics

LP&DF TEAM, HOSTS AND SPEAKERS:

Riette Oosterhuizen, HTA Design
Brian Waters LP&DF Chairman
Prof Ian Gordon, LSE (host)
Gudrun Andrews City of London Corporation,
Victoria Yeandle Lanpro,
Alex Scierretta Richborough,
Prof Les Mayhew Baynes Business School,
Prof Christine Whitehead LSE,
Shabab Qadar Knight Frank,

MEMBERS & GUESTS:

Duncan Bowie, UCL, Stephen Heath Bloomsbury Society, Michael Coupe Coupe Planning, D Fitzpatrick UCL, Prof M Edwards UCL, Paul

Finch Planning in London & emap, Mark Willingale Willingale Assocs,
Darryl Chen Hawkins\Brown, Roger Hephher hgh consulting, Ian Butcher Andrew Martin, Jason Katz UCL,
Alex Balkan Sharedvoice, Robert Dolata Highgate Society, Prof Paul Cheshire LSE, Mike Burnell Hopkins Architects, Lee Mallett Planning in London, Deon Lombard architect, Andrew Catto architect, Chris Eaglen architect,
Eric Sorensen

APOLOGIES:

Brian Whiteley RTPI, Pascal Levine ds2,
Thomasin Renshaw Pocket Living,
A Wood Age UK London

2025 Local Elections:

- The 2025 elections brought about a seismic change in English local politics.
 - Reform – Gained 10 Councils and two mayors.
 - Liberal Democrat – Gained three Councils
 - Conservatives – Lost 16 Councils
 - Labour – Lost one Council
 - 10 to No Overall Control
- National politics does play a part, but residents also concerned about local issues.

“It will be the absence of gains for Labour, rather than losses, that should cause the governing party most cause for concern.”
Professor Jane Green



Planning Infrastructure Developments

- Planning Inspectorate handling 814 appeals
- National Infrastructure Projects increasing to 30 projects

Case Study: *Meridian Solar Farm, Lincolnshire*

- 750MW electricity generation project
- To be determined under Planning Infrastructure Act
- Located in Reform Party stronghold constituency
- Local action groups opposing

Conclusions

Key questions raised include:
- Government narrative positions devolution as gateway to empower local communities but is it working?

Discussion

The relationship between Devolution and Local Government

The Government is pushing for unitary authorities at the level of counties or even groups of counties. The problem with this approach in, for example, Surrey and Essex is that it would require different, opposing lobbying groups to work together. It will result in chaos over the next three years.

The Government is also progressing with proposals that groups of authorities will produce Strategic Plans similar to the London Plan. The Government will determine these groupings (and they may not align with the unitary authorities created). The timeline for these Strategic Plans is not clear.

The methodology for determining housing need >>>

>>> figures (The Standard Housing Method) is still being reviewed by Government following consultation feedback. Strong representations have been made to review this method by, for example, the Highbury Group. The main criticism is that the housing need figures it produce do not have a direct relationship with local housing need.

The interaction of all of the above components will result in a very messy process. Questions debated by the forum included: would Reform led local authorities want to co-operate? Should there be a Strategic Plan nationally? Do Regional Plans need to align with a National Plan? Will the change in Secretary of State for Housing make a difference to housing strategy?

The Forum discussion then turned to New Towns. The list of New Towns was still amiss at the time of the meeting with uncertainty around the announcement, but the list has since been announced (on 29 September 2025 prior to the Labour Party conference).

A view was expressed that housing delivery through Government determined New Town locations is a prime example of national politics interfering with localities.

As far as New Town locations are concerned, it is expected the focus will be more on urban extensions rather than actual 'new towns', which has now been confirmed.

These New Towns is not expected to be delivered in full in the current Labour term. There will be no actual New Towns prior to 2035.

The New Towns Act is an immediate tool that could be used to enable delivery. It only need altering by a few lines and as such there is an existing legal framework at the ready. Historic New Towns were successful as they were given a lot of money and powers. They effectively bypassed local democracy. They were clear standalone 'entities' that could be engaged with.

The town extensions that now seem to be on the agenda may not have any stand-alone autonomous powers. Will they be governed by Local Authorities? Or will Urban Development Corporations be used? Current large scale residential extensions can cause a lot of discontent amongst local residents when social or transport infrastructure is missing. Would planners be able to negotiate the tension between local and wider regional interests? Would we go down a rabbit hole of reinforcing local interests who would never want to support housing in their localities? It is not clear what the mechanisms would be to reconcile these tensions.

Local Government devolution and planning reform is ultimately going in opposite directions although the objective for Strategic Planning is sound. An example is Cambridge. Anglia Water has finally been given permission to relocate its wastewater treatment works to the Cambridgeshire green

London's ageing demographic

belt. This could free up a brownfield site for 8,500 homes. However, the Government has just pulled the funding for its relocation, which defies logic. ■

Speaker: **Christine Whitehead**, LSE Emeritus Professor of Housing Economics

Christine opened her discussion with the statement that data needs to form the basis for what is said and acted upon. Inner London houses significantly younger households with a peak age group of 25-29. In Outer London the peak age average is 29-35. In comparison, the rest of the country the peak age group is 55-59.

In London there are relatively few older people aged 55 and over. They form 9.5% of the inner London population and 13.8% in the outer parts of London. The component of this group in the rest of the country makes up nearly 20%. So, London has a relatively young population.

London Population Trends

Pre-war London experienced growth

Post-war decline due to government policy and new towns development

Current population: 8.9 million

Projected: 10 million – but notes that the data source for projection is uncertain

Note: the COVID census has also been roundly critiqued, with poor response rates

Immigration and Migration Patterns

Post-Brexit immigration patterns favor other parts of country over London

London is only UK city where population is aging

Older people increasingly staying in place

Low birth rate in London due to expensive housing and childcare costs

People moving out of London as result

57% of temporary accommodation and homelessness concentrated in London

Housing Delivery Reality

Government targets versus actual delivery significant gap

Housing starts only 5% of government target

No meaningful relationship between targets and delivery reality

Developers not attempting to meet London targets due to cost.

Speaker: **Les Mayhew**, Professor of Statistics, Bayes Business School and Chairman of the Mayhew Review

Les presented findings of research undertaken on 'Age Friendly Neighbourhoods and Homes'. The Mayhew Review identified that 50,000 fewer homes would be required per annum if older people downsized. However, there are insufficient homes of appropriate size and quality for downsizing. Additional barriers include the cost and complexity of moving and location preferences.

'Age friendly neighbourhoods' have the following characteristics:

- Proximity of properties to services, away from harm, e.g. congestion.
- Walkability index, reflecting accessibility to services such as health providers, shops, employment, and green space.
- Home-based services efficacy: social care, voluntary services.

Older households are more isolated than younger households. They have specific requirements such as the need to be warm and live in stair-free accommodation. Older households are put off by the drudgery of moving. They might be very attached to a familiar location. There is a shortage of decent homes to live in. Estate agents are not focussed on the needs of older people. The information listed is very biased.

Les has worked on a 'Home Accessibility Score'. It is an AI tool where the URL of the property listing could be copied into generating a synopsis of everything good/bad about a property, including its physical size, layout, cost per square meter, etc.

Discussion

Some skepticism was voiced about downsizing as a solution. Age drives demand for space. Some in the room felt that some older people preferred their space. Others thought older people could not afford to downsize. The reality may be both.

Social networks were also thought to play a very important role in relation to age friendly neighbourhoods. Les confirmed there is a whole area of study focusing on 'living in place'. There are many health

Age friendly neighbourhoods and homes

- The Mayhew Review found that, 50,000 fewer homes a year would be needed if older people downsized
- However, there are not enough homes of the right size and quality to downsize to
- Added to this is the cost and complexity of moving and where is a good place to live
- In the OPHT, we subdivided these issues into two parts
 - age friendly neighbourhoods - what are they and can they be measured?
 - age friendly homes - cutting through the hype and making it easier to move

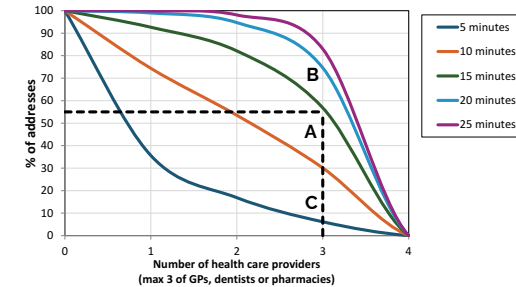
benefits from living in a well-connected community.

It was felt there is no simple story about the growth of London's population. Immigration plays a role in the profile of the city's population. International population movement is occurring, of which the effects may be more prominent in London. In comparison, a lot of inertia might occur outside of London.

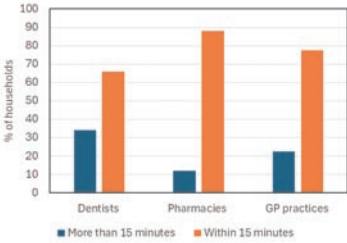
The question about demographics prompted a

discussion on why the type of housing built and its suitability in relation to need is not discussed in more earnest by City Hall. Planning policy lacks sophistication regarding housing suitable for older people or others for that matter. What is built is driven by the availability of capital rather than an understanding of need. ■

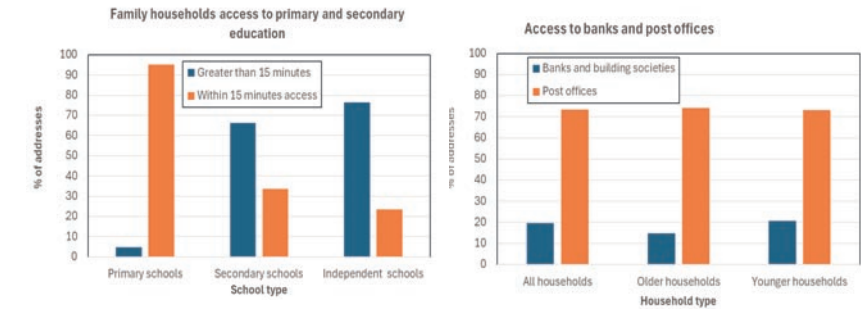
Walkability index applied to health care providers



We use our own walkability index to compare places and services. The lefthand chart shows that only around 50% of households in Stoke on Trent have 15-minute walking access to dentists, GP practices and pharmacies (point A), whilst 90% have 25-minute access (B). At the other extreme less than 10% have 5-minute access (C). Of the health providers the righthand chart shows dentists as being least walkable and pharmacies the most.



Access to schools and banking services



Over 90% of primary schools are accessible in Stoke on Trent by foot within 15 minutes for households with children. This falls to just over 32% for secondary schools and just over 20% for independent schools. The right-hand chart shows that older people have about the same access to post offices as other households but poorer access to banks and building societies.



London Planning & Development Forum meeting (16/09/25)

For further information contact Professor Les Mayhew (Ld.mayhew@citystgeorges.ac.uk)

London's Office Market

Speaker: **Gudrun Andrews**, Head of Planning Policy, Corporation of the City of London

Gudrun presented an overview of the City of London's office space planning and trends. She discussed the city's current office market, including key statistics.

She highlighted the importance of monitoring vacancy rates and understanding changing office usage patterns post-COVID, noting that occupiers now want more flexible space with on-site amenities. She explained the City of London's role in supporting office growth through planning policies and a new business investment unit.

City of London Context

- Home to 678,000 workers
- Vacancy rate: 1.5%
- One of Europe's strongest pipelines for new, sustainable office space
- Fintech and creatives increasingly want to locate in the city
- Major occupiers (HSBC, Clifford Chance, tech firm CUBE) reaffirming long-term Square Mile presence
- The diversification of the City – Horizon 22 is now one of the 10% global attractions.
- A 58% increase in Lime bike usages in the City during the tube strikes show that people have returned back to the office
- There is a wave of new occupiers resulting in rising rents
- 99.6% of office space in the city is within 5 min walk from a tube

City Plan 2040

Status: Latter stage of examination, consultation responses reviewed

Identified Need:

3.5 million square meters of additional floorspace required in central London (between 2016 and 2040)

Strong demand for Grade A space

>>>

>>> Ease of access to tube, culture, hospitality, retail Finance sector in particular have preference for on site gyms, swimming pools and even nail bars 78% of movers to Central London office market did so for expansion of floorspace reasons. 60% of movers moved less than 0.5 mile. Location is key. Analysis of Development Capacity

- 'Sieving' exercise and modelling to identify office space locations
- 85% capacity in City cluster
- 5% in Fleet Valley
- Confirmed ability to deliver required floorspace
- 99% of businesses in City are smaller and medium enterprises. Need to understand more about sub-market expectations

Office Trends Evolution

Office trends are influenced by: diversification of offer, lower densities, minimization of emissions, environmental performance, upgrading and repurposing of stock.

The City has a strong pipeline. It needs to follow demand. It is important to understand the timetable for delivery.

Potted Historical Timeline:

- Taylorism (1901)
- Frank Lloyd Wright (1939)
- Bürolandschaft (1958)
- Herman Miller (1968)
- Cubicles (1980s)
- Leadenhall (2025)

Current Trends

- "Flight to quality"
- Diversification of City uses with residential such as student accommodation, co-living and serviced apartments. Smaller offices of around 3,000 sqm are more likely to be changed into other uses.
- The City is working on a New Offices SPD to protect existing office floorspace. It provides guidance on strategic locations for offices, and look at different marketing requirements for different type of offices.
- The City launched a City Business Investment Unit in June 2025 providing specialist support for investors, developers and occupiers.

London Office Market - Q2 2025

Speaker: **Shabab Qadar**, head of London offices research Knight Frank

Market Fundamentals

- London's office market is structurally undersupplied
- Office demand historically cyclical
- There has been a 69% take up of new/refurbished space
- Demand is strong and supply is weak.

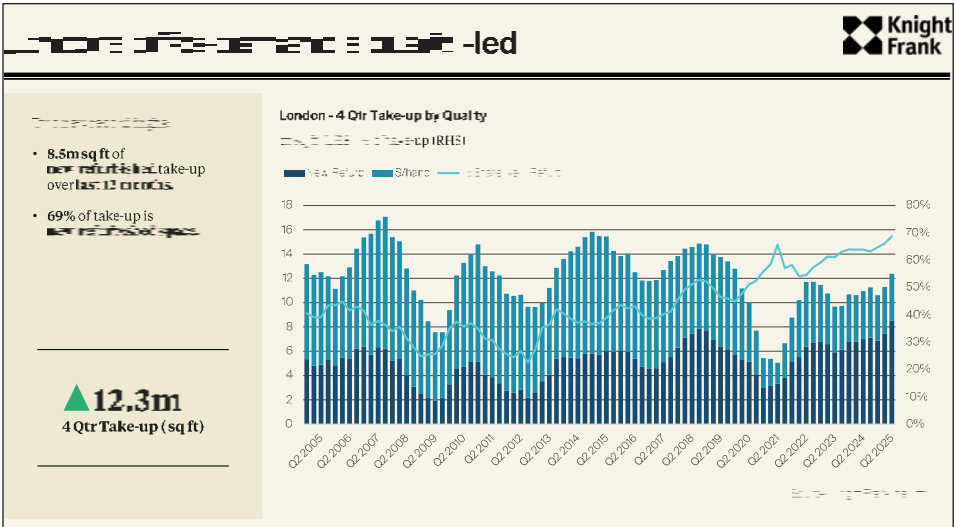


Quality-Led Development

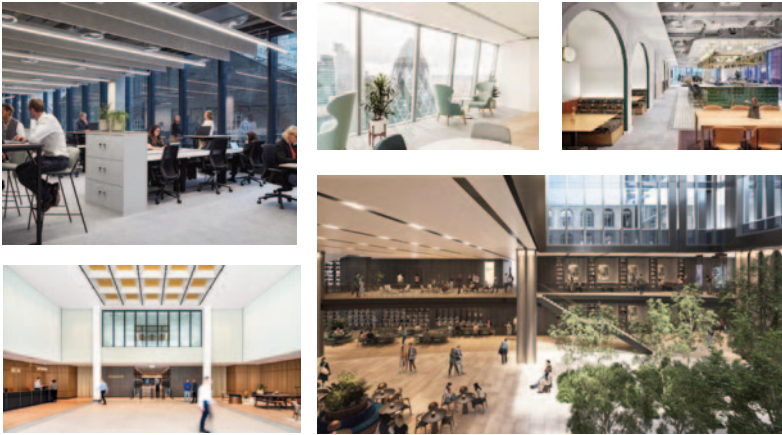
- Drive for 'quality-led office space' rich in amenities, communal space and an experience improving general wellbeing
- Better work life balance requires better office space, providing a customer experience to staff
- Within Grade A prime space – only a small percentage available
- The last 5 years of leasing activity in London

indicates the development pipeline not keeping pace with lettings activity

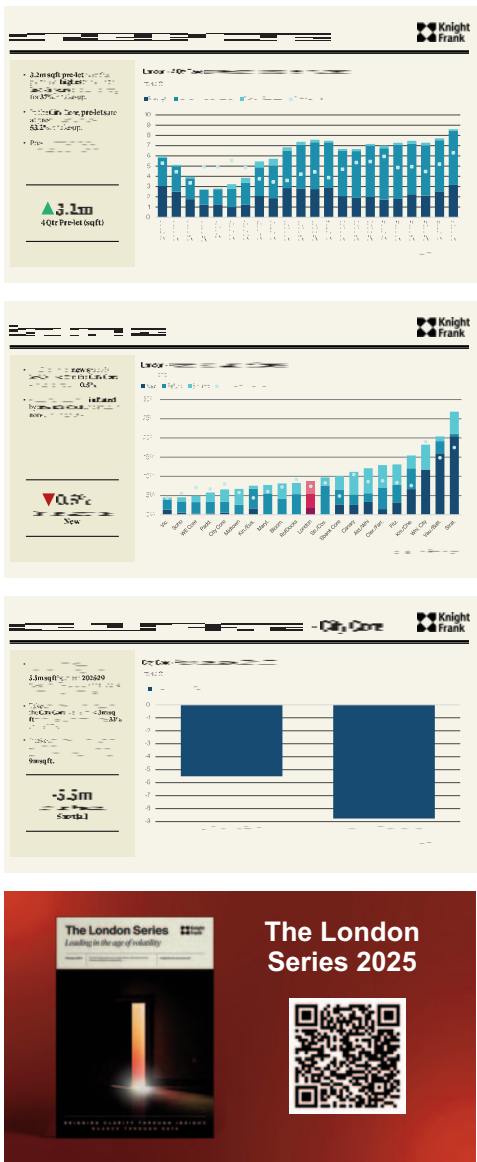
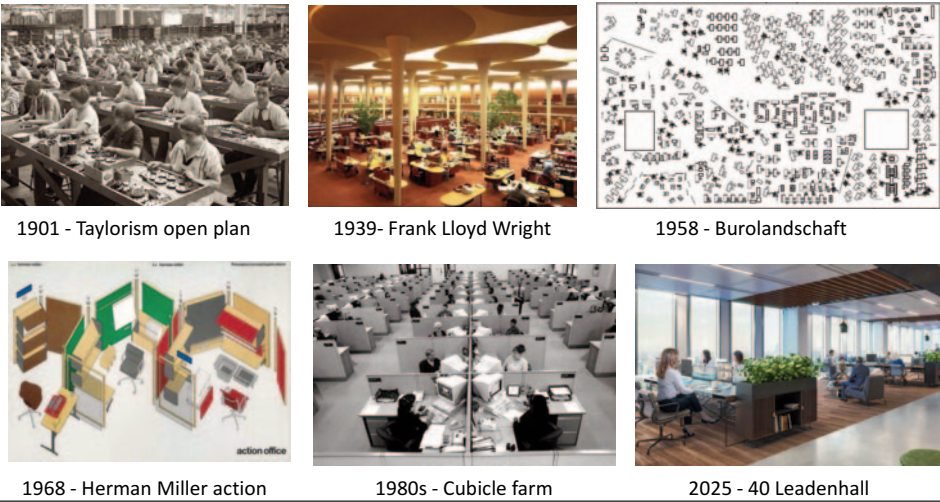
- Occupiers are in a drive to find the best space to occupy; even lightly refurbished space goes
- Demand is relatively strong despite the weak economic outlook. The media commentary tends to focus on a 27% vacancy rate but in the City core the vacancy rate is only 0.5%.
- There is barely 6 months' supply at present of prime space in the City core sub-market.



Flight to quality is the current trend



But trends can change



• Levels of refurb is up at record levels in the City.

Discussion

In comparison to the City, Canary Wharf is different all together. A lot of buildings reached the end of their lifecycle. The cost of refurbishment of the towers is very high. There is resistance toward curating better quality office space in this location. Instead, the focus is on office to residential conversions. There is a shift in occupier base with subsequent place based changes to allow for this change.

The City is now popular amongst legal firms, tech companies and hedge funds who occupy large amounts of space and pay large sums of rent. There is a question to what extent the current focus allow for SME's to thrive in this area.

There is evidence that people are more productive in office space, supporting the need for expansion.

Grade A office space tends to be occupied at lower densities. Even though there is a large amount of floorspace provided, it will not necessarily result in more foot fall or workers.

• This squeeze will not be alleviated soon. Future completions fall below demand level. It is likely that there will be a prolonged period of under supply of around 5 years and 11 million square feet.

• Prime rents have moved to the West End and Marylebone. Growth of around 5% expected in the West End core and 5.8% in the City Core.

• Strong risk of obsolescence due to regulatory regime. EPC rates do not comply in many instances.

Core Submarkets

The growth ambition for office space in the City poses a question regarding the continued need for decentralized office space. Are Royal Docks and Old Oaks office destinations therefore a non-starter?

It was questioned whether 'Destination City', a major City of London policy driver within its current Plan, conflicted with its ambitions to grow as a Grade A office destination. The City of London's view was

GLA Green Belt research

that 'Destination City' was very much a product of Covid. The vision has changed now, although green and healthy streets are still a major objective. ■

Speaker: **Alex Sciarretta**,
Group Land Director, Richborough

This presentation focused on the Metropolitan Greenbelt and housing policy in London.

Alex presented on the current state of the Greenbelt, noting its historical purpose of preventing urban sprawl and discussing how it has been gradually released over the years. He highlighted the challenges in meeting housing targets, including the drop in housing starts from 40,000 to 7,000 in 2024, and the impact of affordable housing requirements on viability.

The discussion included debate about whether the 50% affordable housing requirement on Greenbelt sites is feasible, with some arguing it places too much burden on developers, while others defended its necessity given high housing need. The group also discussed potential reforms to Greenbelt policy and housing delivery, with suggestions for greater government involvement in housing procurement to reduce reliance on market-driven solutions.

Discussion

Comment 1: Market Viability

- Questioning whether there is any Developer interest in sites with a 50% affordable housing requirement
- Affordable/social rent review and £39b pledge for registered providers
- Private developer participation concerns

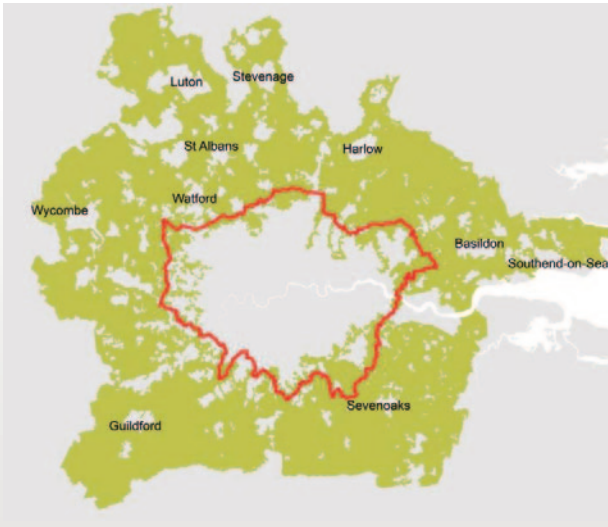
Comment 2: Development Viability Challenges

Housing Consultancy Perspective:

- NPPF guidance changes impact
- 50% affordable housing 'significant burden on clients'
- High CIL rates
- Difficulties with Scheme viability



in Green Belt

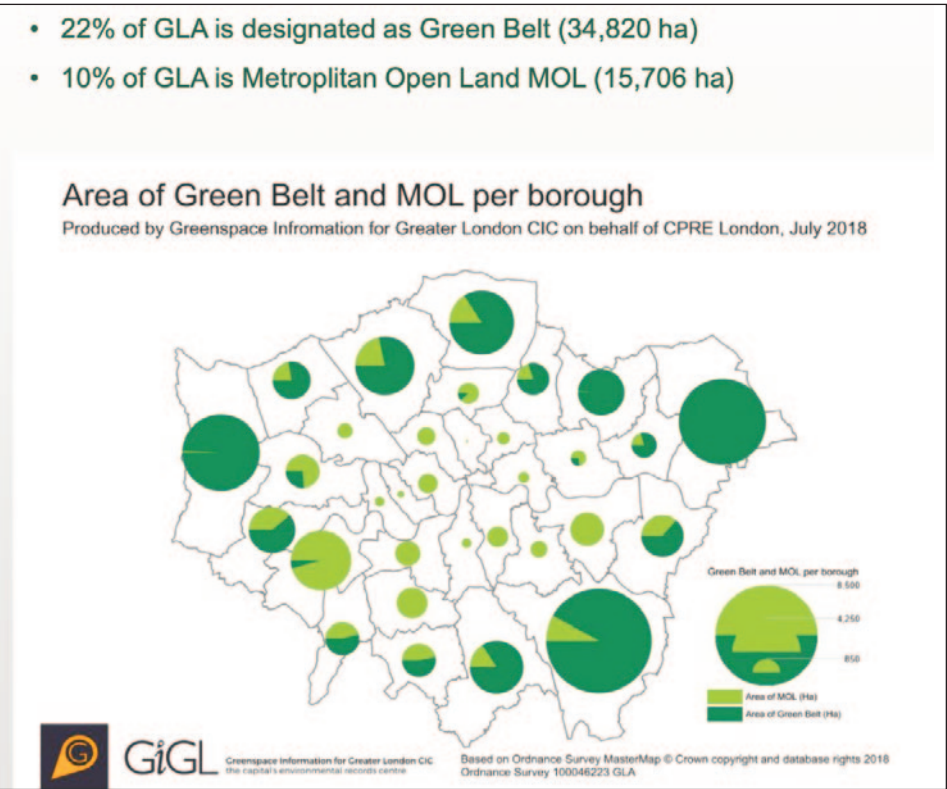


History

- The Metropolitan Green Belt (GB) predates the creation of GB in other parts of England which were promoted in a Government Circular issued in 1955.
- Town and Country Planning Act 1947 allowed Local Planning Authorities (LPAs) to incorporate green belts within their development plans
- Decreased in size since 1997 when it was 600,000ha

Size

- Approx 514,060 Ha Total
- 34,820 Ha in GLA across 18 LPAs
- 479,240 Ha non-GLA across 50 LPAs
 - 84,720 Ha in Hertfordshire
 - 97,480 Ha in Essex
 - 72,240 Ha in Kent
 - 20 Ha in West Sussex
 - 102,190 Ha in Surrey
 - 28,360 Ha in Bedfordshire
 - 51,938 Ha in Buckinghamshire
 - 24,080 Ha in Berkshire



Towards a New London Plan

Key Policies

- Housing Requirement – 88,000 dpa
 - GLA working with boroughs to determine housing requirement for each borough which is determined based on capacity rather than need sent down from SM.
 - Indicative housing targets for each borough expected October/November 2025.
- Green Belt
 - London-wide strategic Green Belt review – Grey Belt to be identified
 - Golden rules key
- Metropolitan Open Land
 - redraft to distinguish between MOL and Green Belt to 'protect' MOL from Green Belt reviews.
 - Very specific circumstances' where certain MOL - such as golf courses - could be considered for release to deliver housing, via a landscape-led approach.
- Design
 - Heights - 4 storeys everywhere and higher near stations)
 - Homes for families – flats rather than houses with gardens with balcony as outdoor amenity space
 - Revisit car parking including charging infrastructure and cycle standard in light of dockless e-bikes
- Plan Period
 - Suggested 15-year period to align with other LPAs and certainty for strategic delivery

Site Identification

- Call for Site - 750 sites (including GB) submitted in last year's Call for Sites (LAND4LDN) – GB sites separated out as they will be reviewed in GB review.
- Brownfield First approach, works sequentially in line with the NPPF
 - Opportunity Areas
 - Directed towards area with funding for strategic transport projects – Crossrail 2, West London Orbital Route, Thamesmead etc
 - Maturing - Brownfield land within OAs is a finite and diminishing resource.
- Greenfield
 - Green Belt – First time Green Belt release is supported by GLA
 - Grey Belt
 - New Towns Taskforce
 - Metropolitan Open Land
 - Industrial Land Swaps - Slow and complex - provision of 5,000 dpa optimistic

Comment 3: Long-term Green Belt Policy

These are short term issues. Planning needs a wider strategic view.

- GLA lacks a coherent Green Belt policy – what will the picture be in 30 years?
- Viability questions are based on land values that may change with policy shifts and as such it is 'fictitious', but altogether real in the immediate term

Comment 4: Reality Check on Delivery

- London Plan is totally divorced from reality: allocates 88,000 homes annually
- Historically delivery has been approximately 30,000 homes
- Plan described as based on "fiction" with institutional blindness to gaps between policy and delivery, amounting to a kind of "political cowardice" in addressing delivery shortfalls. No one expects to meet targets.
- Grey Belt as improvisation "planning by appeal" while broader strategic guidance developed. ■

GLA GB - Scale of Development

GB Release

- GLA has previously suggested that densities of 110 dpa could be achieved on Green Belt releases in Enfield. The market-led approach is for 55 dph to accommodate flats and houses. Table below demonstrates how many homes GB release could deliver:

Homes Delivered	Density (dph)	Land Required (ha)	% Loss of GLA Green Belt (34,780 ha)	% Loss of Total Metropolitan Green Belt (486,000 ha)
300,000	55	5,455	15.7%	1.12%
300,000	110	2,727	7.8%	0.56%
400,000	55	7,273	20.9%	1.50%
400,000	110	3,636	10.5%	0.75%
500,000	55	9,091	26.1%	1.87%
500,000	110	4,546	13.1%	0.94%

Type of Development

- Residential
 - Flatted development
 - 11% of affordable homes delivered in London over the past 20 years were houses or bungalows
 - Outer London boroughs where GB is cannot absorb large volumes of flatted development
 - New Towns Taskforce (10,000+ homes) in locations with good access to public transport. However, longer term and requires more collaborative working across boroughs.
 - Housing requirement increase in Outer London boroughs
- Industrial
 - Strategic Industrial Land (SIL) in areas less suitable for housing i.e. high noise levels or better connections to road network rather public transport
 - Data Centres

Metropolitan GB Opportunities

Scale of Opportunity

- Wider Metropolitan GB over 10x the size of GLA GB
- No London Plan – therefore no MOL or other designations
- Commutable Stations into London
- 74 golf courses with an area exceeding 10 hectares within just 5km of London's boundary

Figure 6: Undeveloped station catchments outside Greater London in the 'Wider South East'.
Source: AECOM 2016-21

Ownership Split

- Majority of GB is owned by the London Boroughs which have been discounted from our search. The next largest landowners identified were individuals and Investors/Companies.
- There are over 160 Golf Courses within the M25, many of which are owned by the Borough Mayor or council . With a total area of 4,331 ha, 1,592 of which are publicly owned.