

The background of the cover is a photograph of a community event, possibly a market or festival, with various stalls and people. A semi-transparent red overlay covers the entire image. Overlaid on the red background are several dashed white lines that form abstract, flowing shapes, some resembling paths or boundaries.

LOW LINE HORIZON SCANNING

_Low_Line

Allies and Morrison Urban Practitioners
with Hatch Regeneris

September 2019

Introducing the Low Line



EXECUTIVE SUMMARY

The Low Line comprises a thread of Victorian railway arches that traverses and binds a unique and rapidly changing part of south London, home to a variety of people, places, uses and activities.

390 arches are home to **250 businesses** across **110,000m²** of space. The Low Line comprises a significant piece of London and has objectives to help maximise both the optimal usage of the arches as well as influence adjacent development along its length.

The Horizon Scanning study was commissioned by **Better Bankside, Team London Bridge, Blue Bermondsey BID, The Arch Co and Southwark Council** undertaken by **Allies and Morrison Urban Practitioners with Hatch Regeneris**. The study sets out the varied characteristics of the Low Line and quantifies the scale of change happening along its path.

It does this through a desktop spatial and socioeconomic analysis of the arches and their hinterland, organised by four character

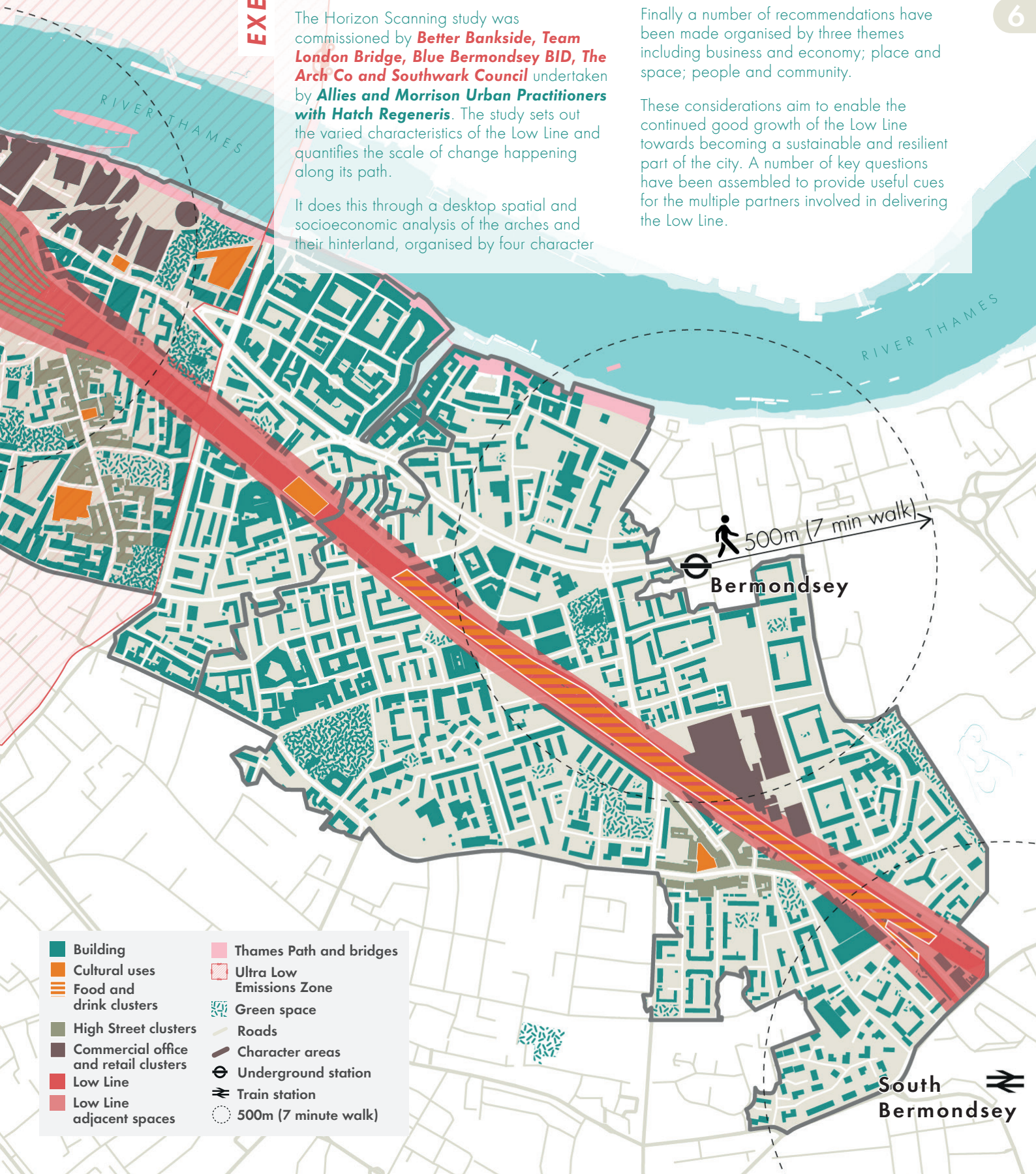
areas; Elephant and Castle; Bankside; London Bridge; and Bermondsey.

This baseline is complemented by a series of eight case studies, using interviews and research to understand and draw together lessons learnt from across the Low Line.

A number of strategic developments have been reviewed to understand their urban design response to the Low Line as well as the uplift in different uses as a result of these large scale developments.

Finally a number of recommendations have been made organised by three themes including business and economy; place and space; people and community.

These considerations aim to enable the continued good growth of the Low Line towards becoming a sustainable and resilient part of the city. A number of key questions have been assembled to provide useful cues for the multiple partners involved in delivering the Low Line.



Understanding the Low Line

Research has highlighted the significant economic importance of the Low Line: both in terms of its overall spatial capacity, and in terms of the diversity and vibrancy of its business community.

The Low Lines' Spaces

The Low Line and its immediate setting covers a substantial area and will have a significant placemaking impact. The gross area of the arches is 260,000 sqm, with similar area providing the immediate setting for the viaduct - similar in size to Southwark Park or 21 times the size of Trafalgar Square.

The Low Line comprises around 390 arches, providing around 110,000 sqm of internal floorspace. Arch sizes vary from micro spaces of c.30 sqm, up to 500 sqm, with an average size of 180 sqm. This reflects the range of typologies: while the majority of arches are single height, greater arch height in some locations allows for mezzanines, and in some locations arches have been combined to create larger units.

The viaduct cuts through a mixed urban environment, and the nature and quality of the spaces varies considerably across the area. It is bordered by streets, passages, yards and service areas. In some stretches the arches are highly visible and form an integral part of the surrounding streetscene and economy, while in other areas they are hidden away.

Accessibility is varied across the Low Line. It is broadly possible to traverse from Elephant and Castle to Blackfriars and then onto London Bridge and Bermondsey using the Low Line as a guide, but in certain locations barriers constrain movement directly alongside the arches themselves. Meandering routes bring character and a sense of discovery in some locations; in others, the detour is too significant to maintain continuity.

The Low Lines' Economy

The majority of the spaces within the Low Line are currently owned and managed by the Arch Co. Demand for space is strong, and current vacancy rates of 19% of arches (72 in total) and 11% of floorspace (12,000 sqm), reflect the proportion undergoing refurbishment rather than a challenging letting environment.

Rent levels vary considerably across the Low Line depending on the location, condition and context of the arches. Average rent levels currently range from 10-25 per sq ft for industrial spaces, and £30-50 per sq ft for retail and food and drink uses (and in excess of £100 per sq ft around Borough Market). This price differential means that a broad range of business activities and sectors are accommodated.

The Low Line provides capacity for around £4.3 million business rates generation per annum, making a significant contribution to Southwark and the GLA's tax base. It is home to a unique mix of over 250 businesses operating across different economic sectors. Applying standard employment benchmarks to current occupancy levels provides an estimated 2,500 jobs, with capacity for a further 500 jobs (using vacant space).

Generally speaking (and possibly reflecting the types of space on offer), the Low Line has a relatively transient business community: fewer than half of Low Line businesses have been there for more than 5 years. The types of business activities along the Low Line largely reflect the types of space available. 'Industrial' activities account for 40% of businesses and include

**390
arches**

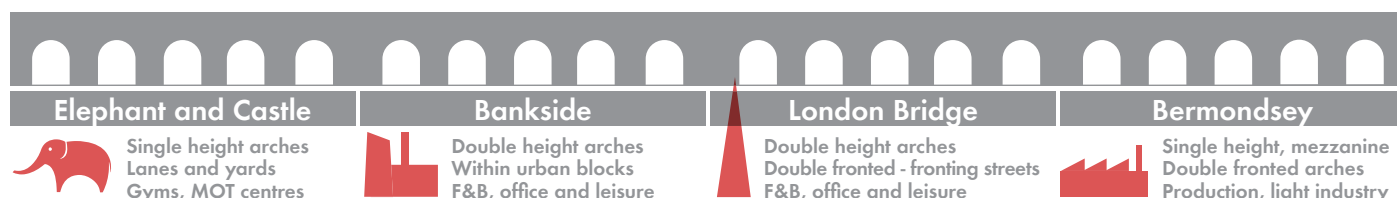
**110k
sqm space**

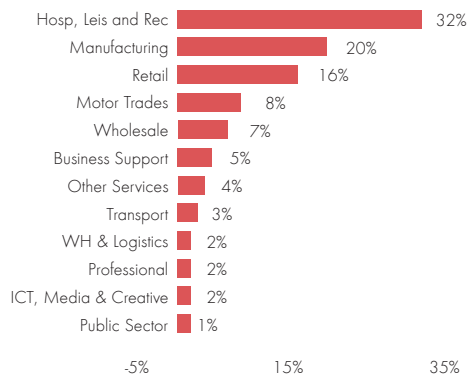
**250
businesses**

**2,500
jobs**

**£4.3m
rates**

**50+
food
businesses**





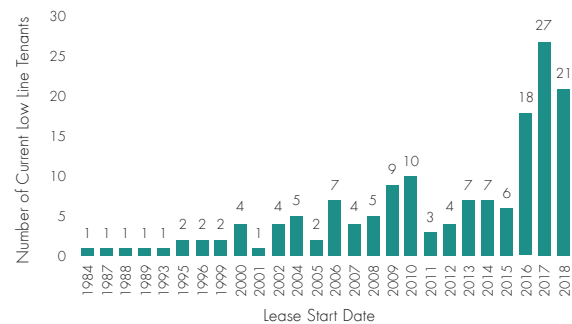
Proportion (%) of businesses operating in the Low Line by sector, 2018 (Source: Low Line 2018 Audit. Note: Figures are not representative of all businesses operating in the Low Line.)

including manufacturing activities (20% of businesses), motor trade activities and (8% of businesses), and wholesale activities (7% of businesses). In the context of a rapid loss of industrial space across central London over the past decade, the Low Line continues to provide an important resource in this regard. Alongside industrial activities, the Low Line is also home to a strong concentration of hospitality, leisure and recreation activities (32% of businesses), and retail activities (16% of businesses).

Cutting across these sectors, an important and distinctive feature of the Low Line is the high proportion of business activities related to food and drink: including manufacturing, wholesale and retail. Recent data suggests there are more than 50 of these businesses across the Low Line (many of whom are specialist and focused on 'provenance' and quality), making this a clear and distinctive economic specialism.

While the Low Line is typically home to single occupier tenants, it is also home to three co-workspaces: Universal Workspace, Sustainable Workspaces, and Hotel Elephant. These act as hubs of creativity and enterprise within the Low Line, accommodating mixed communities of start-up and micro sized businesses.

Business in the Low Line serve a range of different markets: activities in Bankside and London Bridge are focused towards serving the needs of office workers and visitors, whilst Bermondsey and Elephant and Castle are typically more industrial and community facing in nature, such as the Elephant and Castle businesses serving the local Latin American community.



Current Business Tenants – Number by Tenancy start year, 2018 (Source: Arch Co Data)

A Diverse Business Ecosystem: Sample Low Line Tenants

Motor Trades

London Scooter Company: dealers of new and used scooters operating from an arch at London Bridge

Food and Drink Production

Monmouth Coffee: A local business originally set up in Borough Market. Monmouth Coffee have their coffee roasting production facility in the arches in Spa Terminus.

Wholesale and Distribution

Natoora: UK base of a multi-national food and drink wholesaler, built around the principle of a transparent and sustainable supply chain. Operating out of the Discovery Business Park in Bermondsey

Leisure and 'Experience'

Hop Kingdom: A new craft beer brewery and indoor skatepark located near London Bridge.

Retail

The Savanna: A specialist South African shop which sells South African food and drink products, located on St Thomas Street right next to London Bridge station.

Culture

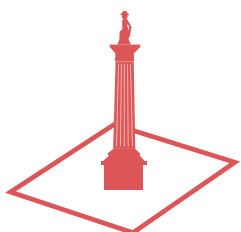
Union Theatre: use of arches for cultural and performance space at Union Square Arches

Creative and Professional Services

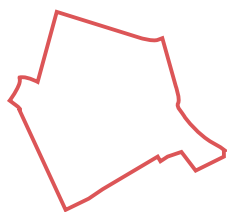
Small Back Room: design agency located within a newly refurbished double height arch in Union Square Arches

Community

London City Runners: The largest running club in London. It is run by the local community and has a running-themed café bar and events space.



Low Line setting =
21x Trafalgar Square
260,000m²



Low Line + setting =
4x Elephant Park
masterplan area
520,000m²



Low Line Internal space
= 2.2 x Gherkins
110,000 sqm

Total Space		Vacancy	
Units	sqm	Units	sqm
390	110,000	70 (19%)	12,000 (11%)

Summary of space within Low Line Arches
(Source: Arch Co, 2019)

The Low Line's hinterland

Analysis of the 'hinterland' around the Low Line (taken as a 0.5km radius from the arches), highlights the diverse socio-economic conditions of the North Southwark area.

The Low Line in Context

Place

The Low Line cuts across a large swathe of north Southwark and its 'hinterland' is home to both regionally significant employment and cultural hubs, and dense residential neighbourhoods.

The area's transport connections play an important role in underpinning its economic function, with the central area of London Bridge and Bankside established as one of London's best-connected locations.

Broadly speaking, the hinterland comprises four distinct character areas, each of which vary in their local context and dynamics:

Elephant and Castle: A densely populated residential area undergoing significant transformation. A more even mix of office and retail uses, with the Elephant and Castle shopping centre contributing a large proportion of retail floorspace.

Bankside: A key employment and cultural hub for London, supporting the largest proportion of commercial floorspace and several cultural assets, such as Tate Modern, Bankside Gallery, Shakespeare's Globe and Borough Market.

London Bridge: A significant location for a diverse mix of commercial organisations attracting a large working day population from a wide catchment, supported by excellent transport links.

Bermondsey: A densely populated area, with an economy traditionally focused towards industry and activities serving the needs and demands of the local community. Recent growth in creative business activities and unique markets (such as Maltby Street), are supporting the areas economic evolution and distinctiveness.

Space

There is over 1.3 million sqm of commercial space and 50,000 sqm of community floorspace in the Low Line hinterland. Nearly half the commercial floorspace is found in Bankside with a further 40% in London Bridge, reflecting the areas' roles as key business hubs in the Central Activities Zone.

While much of the floorspace in London Bridge and Bankside is larger floorplate, the area is also home to 14 SME workspaces, supporting the local creative and small business economy.

Demand for space is strong with decent commercial values (particularly in London Bridge and Bankside), and rapid recent growth that reflects higher quality space now coming online. It is notable that industrial prices are increasing significantly across most areas, reflecting the diminishing availability of industrial space in central London locations.

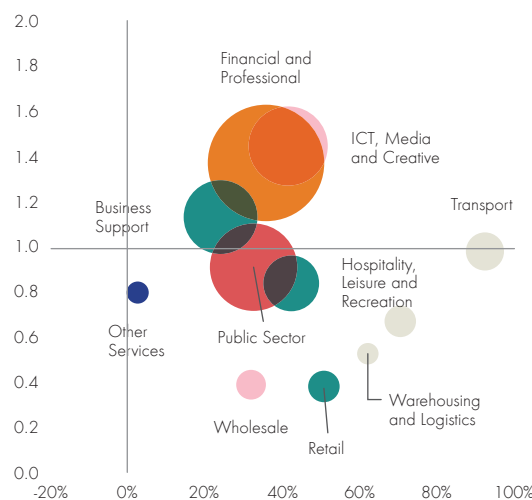
**7,500
businesses**

**170k
jobs**

**1.3m
m² commercial
space**

**50,000
m² community
space**

**14
SME
workspaces**

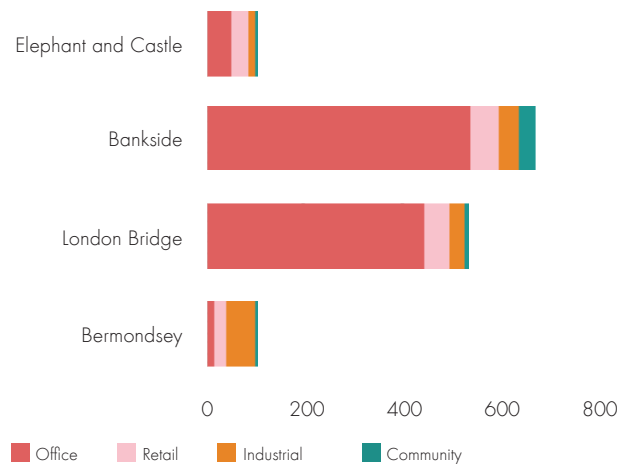
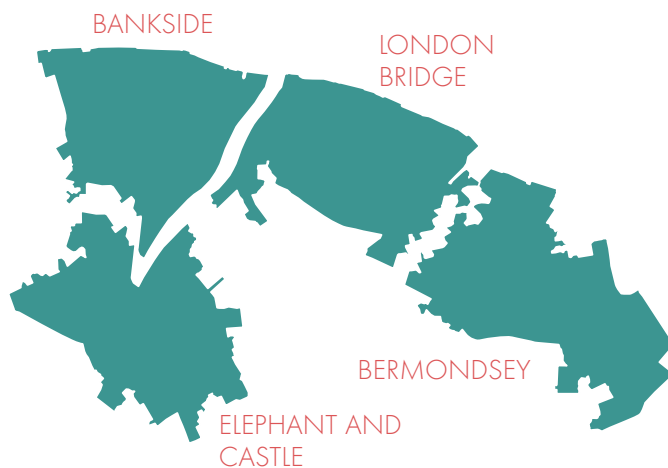


Employment size, specialisation and percentage growth by sector in the Low Line Hinterland (Source: BRES, ONS, 2018)

Each bubble represents a sector within the economy. The larger the bubble the greater the total employment in the sector. A score above 1 shows greater specialisation in the sub-sector than the London average.

Retail bubble: The retail sector contains 4,000 jobs (relatively small), has grown by 51% in the last five years and is not specialised compared to the London average.

ICT, Media and Creative bubble: The ICT, Media and Creative sector contains 26,000 jobs (relatively large), has grown by 41% in the last five years and is specialised compared to the London average.



Total Floorspace ('000s sqm) by Use and Area, 2016 (Source: VOA, 2016)

Economy

The Low Line Hinterland is home to around 7,500 businesses supporting 175,000 jobs. Both employment growth (+37%) and business growth (+41%) have been higher than the average across Southwark and London over the last 5 years.

The hinterland economy contrasts with that of the Low Line itself. The economy is characterised by a concentration of high value sectors, reflecting the role of Bankside and London Bridge as important office locations. Particular strengths include financial and professional services and ICT, Media and Creative activities – both of which are more specialised than the London average and have grown rapidly over the past 5 years.

In total, space in the Low Line hinterland has the capacity to contribute more than £230 million in business rates a year.

Community

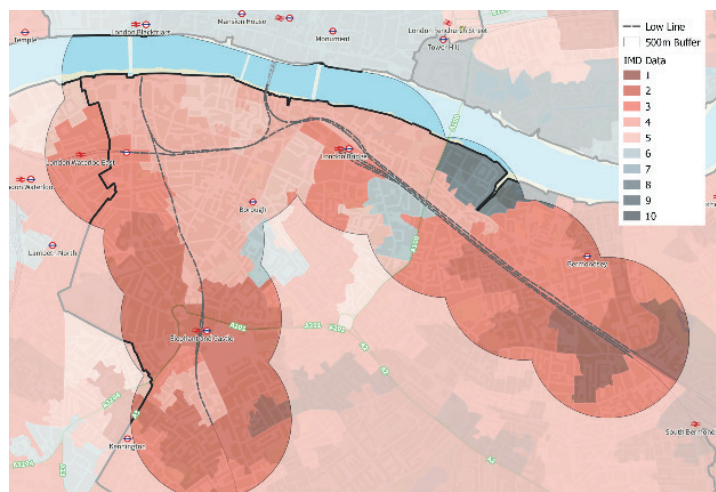
The areas around the Low Line are densely populated and diverse, comprising a mix of long embedded communities and new neighbourhoods. In total, there are currently around 61,000 people living within the hinterland area.

As would be expected in diverse inner London locations such as this, parts of the areas are characterised by socio-economic challenges, highlighted by severe concentrations of relative multiple deprivation.

Challenges are particularly severe in the Elephant and Castle and Bermondsey areas, linked to income, employment and skills, and education barriers for residents. At points, the viaduct itself forms a dividing line and threshold, with notable differences in deprivation, quality of life and opportunity for residents on either side.

	Office	Industrial	Retail
Low Line Hinterland	£50	£17	£41
E & C	£38	£25	£28
Bankside	£54	£15	£40
London Bridge	£49	£22	£58
Bermondsey	£28	£20	£15
Southwark	£49	£14	£37
London	£50	£13	£41

Rental values (£/sqft) by commercial use and area, 2018
Source: CoStar, 2019



Index of Multiple Deprivation, 2015 (Source: DCLG, IMD Explorer, 2015)

- top 10% most deprived area in the UK;
- bottom 10% most deprived area in the UK.

Learning from the Low Line

1



SPARE STREET, ELEPHANT AND CASTLE

SME co-working space and cafe in recently refurbished and landscaped arches.

Metrics

- 5 arches taken by single tenant, Hotel Elephant
- Not for profit company supporting Arts, Culture and Enterprise.
- 8,750sqft of affordable workspace including a public space and café across all five arches.
- 24 workspaces
- 80 and 100 creative entrepreneurs.

Delivery and management

- Opened in 2016, Section 106 contributions from the Highline student housing block delivered Spare Street as a new landscaped walkway, as well as funding towards the fit out of 3 arches.
- Hotel Elephant leased an additional two arches from the Arch Co. on commercial terms.
- Hotel Elephant were awarded a grant from the Mayor of London's London Regeneration Fund that was matched by Southwark Council to help deliver fit out across the 5 arches in total.

Lessons learnt

- Successful example of where redevelopment of an adjacent site can step back from the viaduct and reveal access to the arches, creating a new street.
- Active frontage of the viaduct is positive but the inactive frontage of the High Line building is a missed opportunity.
- Single occupier Hotel Elephant responds to local need by creating flexible, affordable workspace.
- The end unit as an associated café provides a mix of uses and introduces a different social dynamic and offer to local communities.
- Opportunity for new, triangular public space immediately north of Spare Street.

2



UNION YARD ARCHES, BANKSIDE

A mixed-use stretch of arches with theatres, charities, gyms, restaurants and cafés within an irregular yard and passage setting.

Metrics

- 7 double height railway arches occupied by a number of number of occupiers and uses.
- 1,900m² across 9 arches - 190m² average arch size
- Outside publicly accessible space

Delivery and management

- Opened in 2016 with local institution Union Street Theatre relocating from nearby as an anchor tenant to help attract other uses.
- Delivered through Section 106 Agreement when Network Rail redeveloped the old theatre.
- Curated by Arch Co with dedicated website

Lessons learnt

- Occupation by a diverse mix of uses creates a feel of vitality and robust use.
- The synergy between neighbouring uses is strong, particularly Over The Road café and Union Theatre leasing arrangement and 'baton-handing' from afternoon to evening economy.
- Relocation of existing theatre tenant to modern premises gave access to basic facilities.
- Irregular yard and alley environment fosters a sense of intrigue and discovery, providing an alternative walking route to Great Suffolk Street.
- High permeability afforded by multi-entrance points and thoughtful adjacent development.
- Redevelopment of the Africa Centre at Gunpowder House will front the arches and enhance the setting of the Low Line.
- Industrial viaduct character complemented by material palette cobbles and London Brickwork.
- Storage issues affect seating area.



Spatial readings and interviews with established businesses along the Low Line can provide useful lessons for designing and delivering the next phases of the Low Line.

3



4



ISABELLA STREET, BANKSIDE

The original inspiration for the Low Line. A number of restaurants with a green setting behind Southwark Tube station.

Metrics

- 6 arches, all occupied by food and drink uses
- Planting and greening of the public realm

Delivery and management

- Opened in 2007
- Funded by individual businesses - organic development of environment
- Curated in collaboration

Lessons learnt

- Character transformation using planting is successful, creating a better sense of enclosure and microclimate through shade and shelter.
- South-facing aspect is beneficial to maximise sun exposure, lending itself well to A3 to A5 uses such as restaurants, cafés and bars.
- Benefited from proximity to Southwark Station and The Cut, with New Vic and Old Vic theatres, bars and restaurants.
- Rear of arches extended for servicing/storage. Works well on servicing street - back to back.
- Future redevelopment of arches with similar conditions (south-facing, space for extension could prioritise A3 to A5 use classes.
- Pedestrianised environment provides a 'one street back' alternative walking route to The Cut.

FLAT IRON SQUARE, BANKSIDE

A street food market, bar and music venue integrated into surrounding streets and spaces.

Metrics

- Over 40,000 sqft in 7 railway arches
- Grade II listed building Devonshire House and surrounding open space.
- 14 food traders as well as Omeara live music venue (350 person capacity) and bar.
- Omeara covers 15,000 sqft in 3 connected arches.

Delivery and management

- Opened in 2016
- Private entrepreneur secured 20+ year lease to lead and curate with small businesses.
- Long lease security and clear vision created trust and confidence for investment from vendors and businesses letting market space.

Lessons learnt

- Benefits from proximity to Tate Modern and London Bridge and visual link with the Shard.
- Appropriate materiality complements industrial, messy character of the arches - not over-polished.
- Good use of yard environment set back from the street. Opportunities to repeat this condition when the viaduct is at the fringe of an urban block.
- Incorporation of terraced properties fronting onto Union Street creates dual frontage and provides a unique assortment of spaces and typologies.
- Well-curated volume and range of occupiers provides a critical mass and a sense of gravity.
- Good east-west and north-south permeability through the arches though only when open.

5



ST. THOMAS STREET, LONDON BRIDGE

Historic arches refurbished as part of the London Bridge station transformation.

Metrics

- 11 railway arches - 5 refurbished and 6 new (630m² of new space)
- Grade II listed arches
- Part of wider masterplans for the St Thomas street re-development.

Delivery and management

- Opened in 2017, delivered through Section 106 Agreement when London Bridge Station was redeveloped.
- 6 arches with affordable rent for SMEs and local businesses for a five year period up until 2022.

Lessons learnt

- Good example of development cross funding restoration of historic arches.
- Location between London Bridge Station and Bermondsey Street creates high footfall
- Wide, south facing pavements create comfortable pedestrian environment and allows spill out space from arch occupiers.
- Arches are newly renovated but low occupancy rate creates an ambiguous sense of place.
- Redevelopment and meanwhile use at Vinegar Yard site across the road brings life and street frontage at the southern end.
- Investment in wayfinding, signage and greening of the public realm would help to establish a stronger sense of place.
- Loading bays reduce the visual aesthetic of the street whilst operational arches reduce the opportunities for active frontages.
- High fit out costs can be a barrier for occupation by smaller and emerging businesses.

6



Photo credit: Flickr/Matt Brown

MALTBY STREET, LONDON BRIDGE

A street food market evolved from food/drink producers and distributors, anchored by LASSCO architectural salvage.

Metrics

- 18 railway arches with separate traders
- Cluster of food and drink activity
- Home to a weekend food stall market

Delivery and management

- Opened in 2010, kickstarted by Monmouth Coffee and Neals Yard opening their warehouses on Saturday mornings.
- Word-of-mouth garnered interest and momentum gathered, with like-minded food and beverage companies sharing the same vision.
- Currently managed by LASSCO Ltd architectural salvage company who occupy Arch 37

Lessons learnt

- Creation of a small ecosystem of businesses that trade with and support each other.
- Pedestrian lane environment created by enclosure from adjacent development is desirable and should be repeated in the future.
- Wide train line creates deep viaducts that can accommodate a range of production and consumption uses, giving variety.
- Dual access to arches from Rope Walk and Druid Street provides valuable space for servicing, though edge condition could improve spatial relationship with the neighbouring Arnold estate.
- Tables, chairs and crates create a convivial environment but could act as obstacles.
- Proliferation of bars/café's has caused anti-social issues and prompted producers to move on.
- Crime is a major issue for businesses so Ropewalk gates have to be locked at night which prevents a throughflow walking route.

7



SPA TERMINUS, BERMONDSEY

A curated cluster of food producers and distributors with strong links, some of which open their doors to customers on Saturdays.

Metrics

- 25 railway arches repurposed for food industry and distribution uses.
- Arches range from 65m² to 167m².
- Split between two sites - Spa South and Dockely Road

Delivery and management

- Opened in 2015 with long lease of 15+ years.
- Head lease secured by Neals Yard and Monmouth Coffee with Matching Green.
- Neals Yard let a series of arches from the Arch Co. and sublet these to independent food production and distribution businesses.
- This agreed leasing approach creates certainty and long-term tenure to small businesses.
- Partnership working with Network Rail and Southwark Council to restore the arches.

Lessons learnt

- Successful example of 'benevolent dictator' leasing large stretch of arches and curating sublets to create an important F&B production and distribution destination.
- Dual access arches and provision of yard space is highly desirable, intrinsic for servicing and should be protected.
- 'Last mile distribution' uses are important to London's workings and have an important role to play in cities.
- Operates a takeaway only policy during the hours open to the public (Saturday mornings) to avoid overcrowding and excess.
- Industrial fencing not attractive but pragmatic for producer activities with large delivery vehicles
- Adjacency rather than active relationship with neighbourhood
- Moved from Maltby Street as wanted a production focus rather than consumption.

8



Photo credit: Flickr/Bernt Rostad

SOUTH BERMONDSEY

A more organic scattering of independent businesses, covering drinks production and design manufacturing.

Metrics

- Area home to a number of businesses, including a loose amalgamation of seventeen brewery bars and bottle shops.

Delivery and management

- Organic growth by small independent occupiers leasing from the Arch Co.
- Synergy of micro breweries has gathered momentum in recent years, with each sharing in the successes of footfall and consumption as well as production.

Lessons learnt

- Successful co-location of production based uses including micro breweries.
- Edge condition to Raymouth Road is effective by establishing a defensible boundary and yard environment that can be personalised to need.
- Deep viaducts and internal unit division can accommodate different, complementary uses that back onto one another.
- Lack of permeability through the arches can create longer walking routes for pedestrians.
- Scattering of brewery uses without clear links between these creates some community disturbance and anti-social issues.
- Management issues regarding the on site sale of alcohol.
- Future fit out to include improved basic facilities including toilets.
- Lower rents allow for production and manufacturing uses not found more centrally.

Strategic Developments

Much of the area surrounding the Low Line is in a state of transition, with a number of high-density mixed-use developments due to come forward. These developments will bring activity and opportunities and will shift the character of neighbourhoods along the Line.

The plan to the right gives an indication of the location and quantum of change that

will take place along the Low Line over the coming years. The quantum of uses for each sub-area demonstrated in the diagrams have been calculated from the known figures extracted from the planning applications for each of the 11 case study developments, highlighted in orange. They represent the kind of change and growth anticipated in each of the sub areas.

11 key developments in the Low Line area and their associated floorspaces are outlined below.



ELEPHANT & CASTLE

3,107m² B1 office
979 dwellings
29,370 m² retail
59,508 m² community



87 NEWINGTON CAUSEWAY

48 dwellings
145 m² retail
140 room hotel



BOROUGH TRIANGLE

TBC m² B1 office
650 dwellings
TBC m² flexible use



LANDMARK COURT

18,829m² B1 office
35 dwellings
1,838m² retail



25 LAVINGTON STREET

10,000 m² B1 office
174 dwellings
951m² flexible use



SAMPSON & LUDGATE HOUSE

45,378m² B1 office
489 dwellings
2,627m² retail
2,983m² community



BOROUGH YARDS

5,761m² B1 office
8,661 m² retail
2,227 m² multi-use
535m² community



ST THOMAS STREET EAST DEVELOPMENT FRAMEWORK (Comprised of: Capital House, Becket House, Vinegar Yard, Leather Warehouse + Bermondsey Yard)

61,151m² B1 office
4,841 m² retail
2,227 m² multi-use
400m² community
905 student dwellings
2,656m² flexible use



NEW CITY COURT

46,374m² B1 office
1,904m² retail
719m² hub space
615m² community



DOCKLEY ROAD

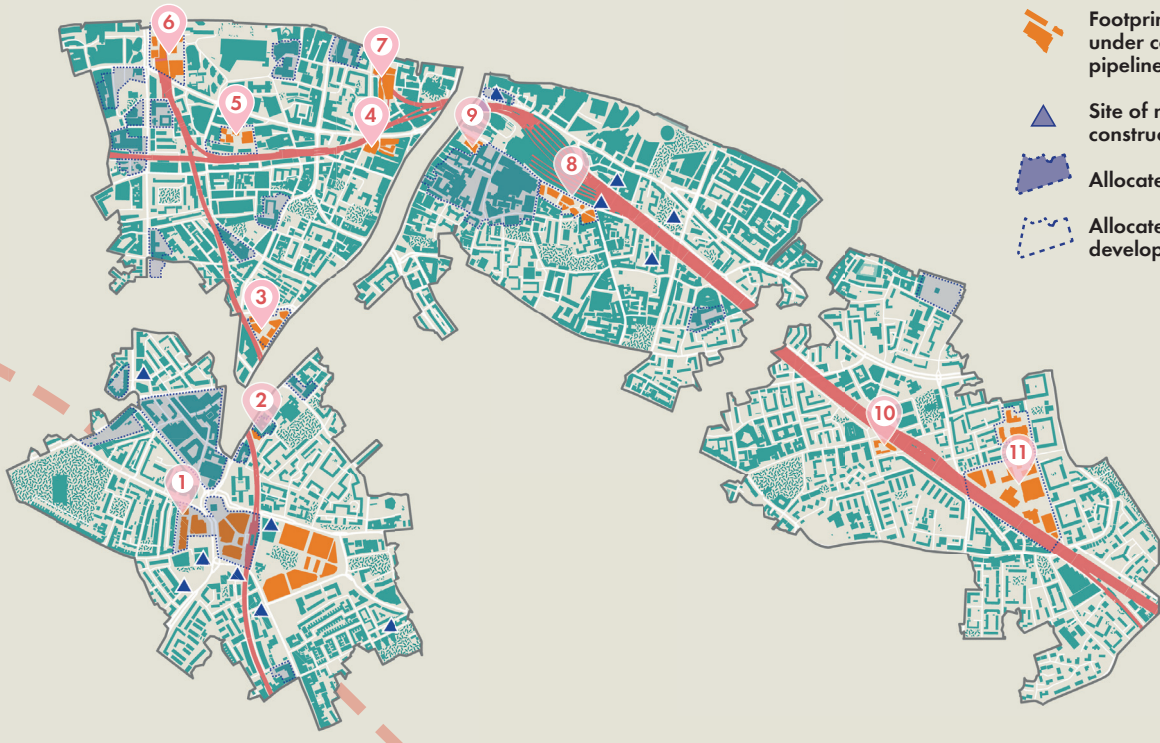
111 dwellings
1,097m² flexible use



BISCUIT FACTORY

1,217 dwellings
3,795 m² flexible use
3,882 m² multi-use
896 m² community

- Footprint of case study site under construction or in pipeline
- Site of new development under construction or in pipeline
- Allocated site
- Allocated site with approved development



The 11 indicative schemes are estimated to deliver an approximate total of **260,000m²** commercial floorspace, **65,000m²** community floorspace and **3,700 homes** when completed.

Developments will have a significant economic impact by providing new floorspace for businesses to locate and supporting employment and economic output or GVA (Gross Value Added). New housing will also increase the local household population and generate additional household expenditure for the wider area.

The plan also indicates in yellow the area visions and site allocations extracted from the New Southwark Plan Preferred Option - Area Visions and Site

Allocations (February 2017) which indicate the potential for additional future change.

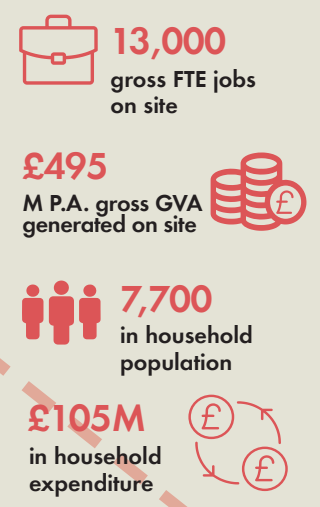
The New Southwark Plan itself contains two policies specific to the Low Line and railways arches themselves; policy 27 and 49. Whilst these seek to maximise commercial and community uses within the arches and encourage public realm improvements, these policies only go so far and are quite blunt instruments at this time.

The diagram shows there is significant change underway close to the Low Line. The scale and proximity of new development has the potential to inject life and success into the Low Line if managed carefully, and provided

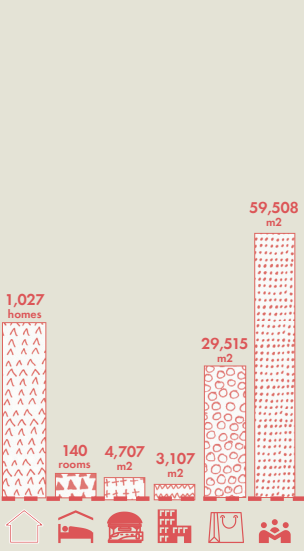
developments properly consider and respect their relationship with this valuable asset.

New developments should actively engage with and respond to the Low Line. They should allow breathing space for it to act as a pedestrian link; take account of its Victorian heritage through materiality and vernacular; use active ground floors to front the arches where appropriate; create small pocket spaces alongside the arches; and avoid unnecessarily overshadowing space.

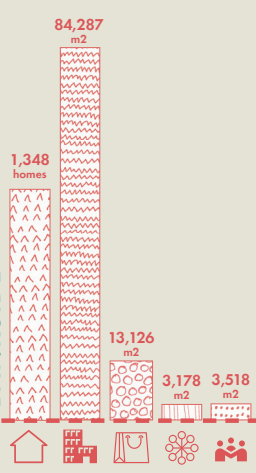
The projected employment and population impacts of these 11 development are shown graphically below:



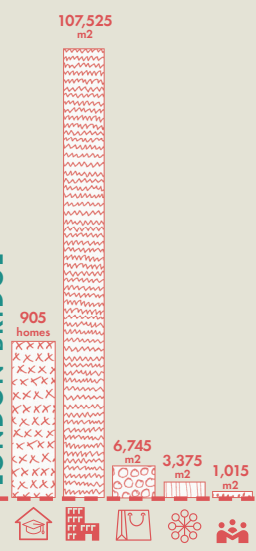
ELEPHANT AND CASTLE



BANKSIDE



LONDON BRIDGE



BERMONDSEY



- residential
- student residential
- hotel
- transport
- office
- retail
- flexible
- community

Learning and next steps

Summary of key ideas...

Business and economy

The Low Line is a well established successful business ecosystem. Arguably its importance to Southwark and central London is greater than the data alone suggests, given its role in providing space for a broad range of business types, at a range of price points.

Consultation with businesses across the Low Line has highlighted a number of challenges, including increasing commercial values, the quality of the physical environment and the strength of business infrastructure in certain locations and spaces.

Looking ahead, local partners should prioritise efforts to support the ongoing evolution of the Low Line as a diverse and resilient business environment.

Specific considerations might include:

- Proactive work to raise the profile of the Low Line economy, and to better connect and network Low Line businesses
- Consideration of the levers which might be used to protect important 'anchor' businesses, and to reduce the sense of the 'transience' within the local economy
- At the same time, continued encouragement of enterprise and innovation across the Low Line, recognising the arches as an important 'launch pad' for nascent and young businesses.

Place and space

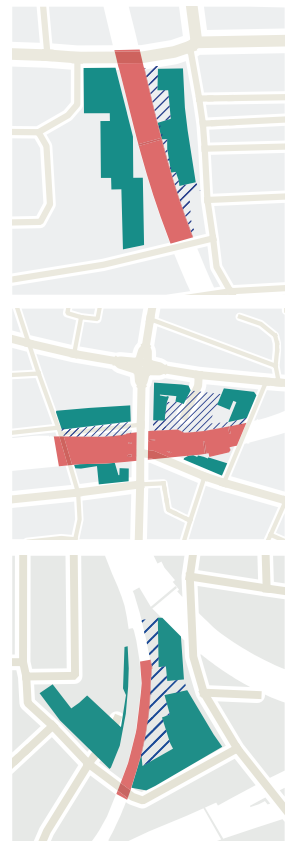
Completing connections alongside the Low Line is a clear priority, and integrating links beyond these with local high streets, parks and destinations is equally important. However, establishing a meandering thread connecting pieces of the Low Line puzzle rather than a thoroughfare will allow for practical considerations such as servicing and operational uses, and maintain a sense of discovery.

There is the need to balance the unblocking of the route whilst working with local character and urban fabric. The Low Line will be at its best when it reflects the neighbourhoods it traverses rather than creating a homogeneous environment. Tailoring the response within the arches and at adjacent development sites to local neighbourhoods and providing understated and intuitive wayfaring will aid this.

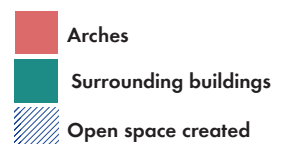
Looking ahead, the Low Line will benefit from a collaborative approach between partners in creating responsive schemes. Key considerations include:

- Meandering connections alongside the Line, but also beyond to local high streets, parks, destinations and new developments.
- A Low Line aesthetic - reflect the historic and industrial character and local identity through materials, proportions, façades and features. This should not preclude a contemporary design response.
- Create a variety of spaces - yards, lanes, passages, streets, squares - alongside the Line through building alignment, and consider the aspect of these.
- Provide active ground floor frontage alongside the arches, and consider complementary uses to those in the arches.
- Maintain a range of arch typologies and vary the fit-out options to cater to different businesses and maintain variety.
- Consider appropriate and varied scale and massing alongside the arches.

From top: interstitial open space at Union Yard Arches, Flat Iron Square and Borough Triangle.



The framing of spaces through building line, and the aspect of these in relation to the sun can have a significant impact on character.



KEY QUESTIONS FOR FURTHER CONSIDERATION

Q1: Given the Low Line's breadth and diversity, what is the best way to build local economic identity and business connections and networks?

Q2: What role could proactive planning policies play in protecting diversity of space within the Low Line?

Q3: What leasing approaches can be applied to help to 'curate' the business mix, protect 'anchors', and encourage enterprise?

Q4: What scope is there for partners to work together to embed collective social and community ethos and 'responsibility' across the Low Line?

People and community

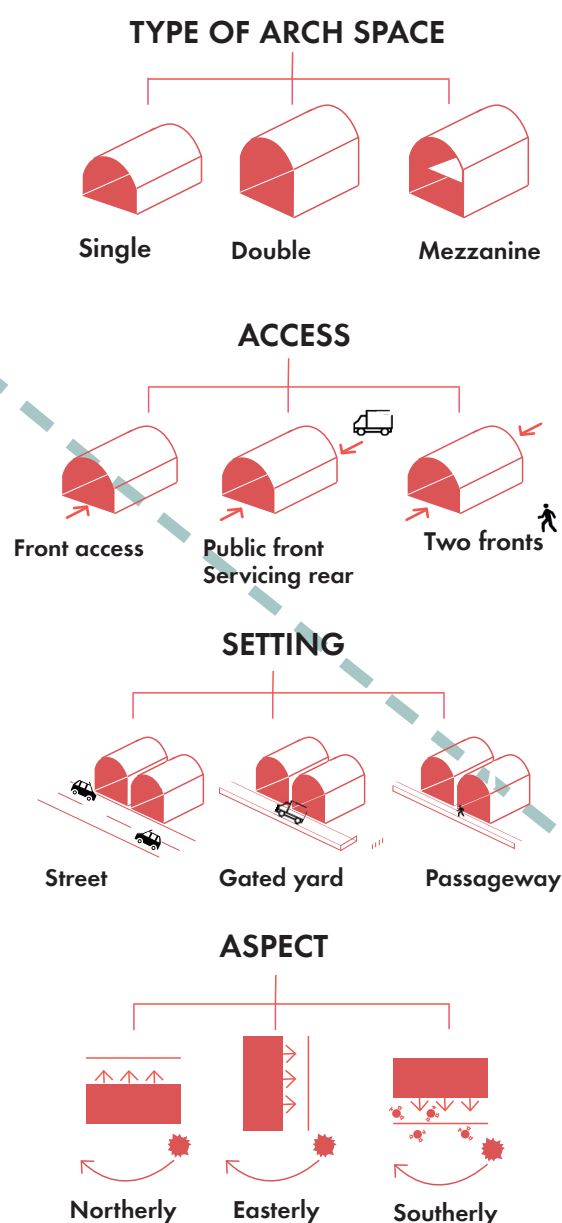
While the social and community function of the Low Line varies across its length, it plays an important role in shaping the lives of local people: both in terms the amenities and services that it accommodates, the jobs and opportunities that it supports, and the influence it has on local movement and environment.

The ongoing evolution of the Low Line economy is creating new and more opportunities, but challenges are also being encountered regarding the 'relevance' of the arch economy to local people, and instances of conflict between new uses and long-standing communities.

Looking ahead, partners will need to work together to ensure that the Low Line continues to balance the needs and priorities of different communities.

This might include consideration of:

- The types of support and mechanisms which could help local residents access employment and business opportunities across the Low Line.
- The way in which Low Line businesses can be encouraged to act responsibly and with social conscience, to engage and connect local communities.
- The proactive interventions needed to ensure that the Low Line continues to evolve as a 'good neighbour', mitigating risk of conflict between business and resident communities.
- The Low Line could house and offer community amenities, particularly in more deprived areas.



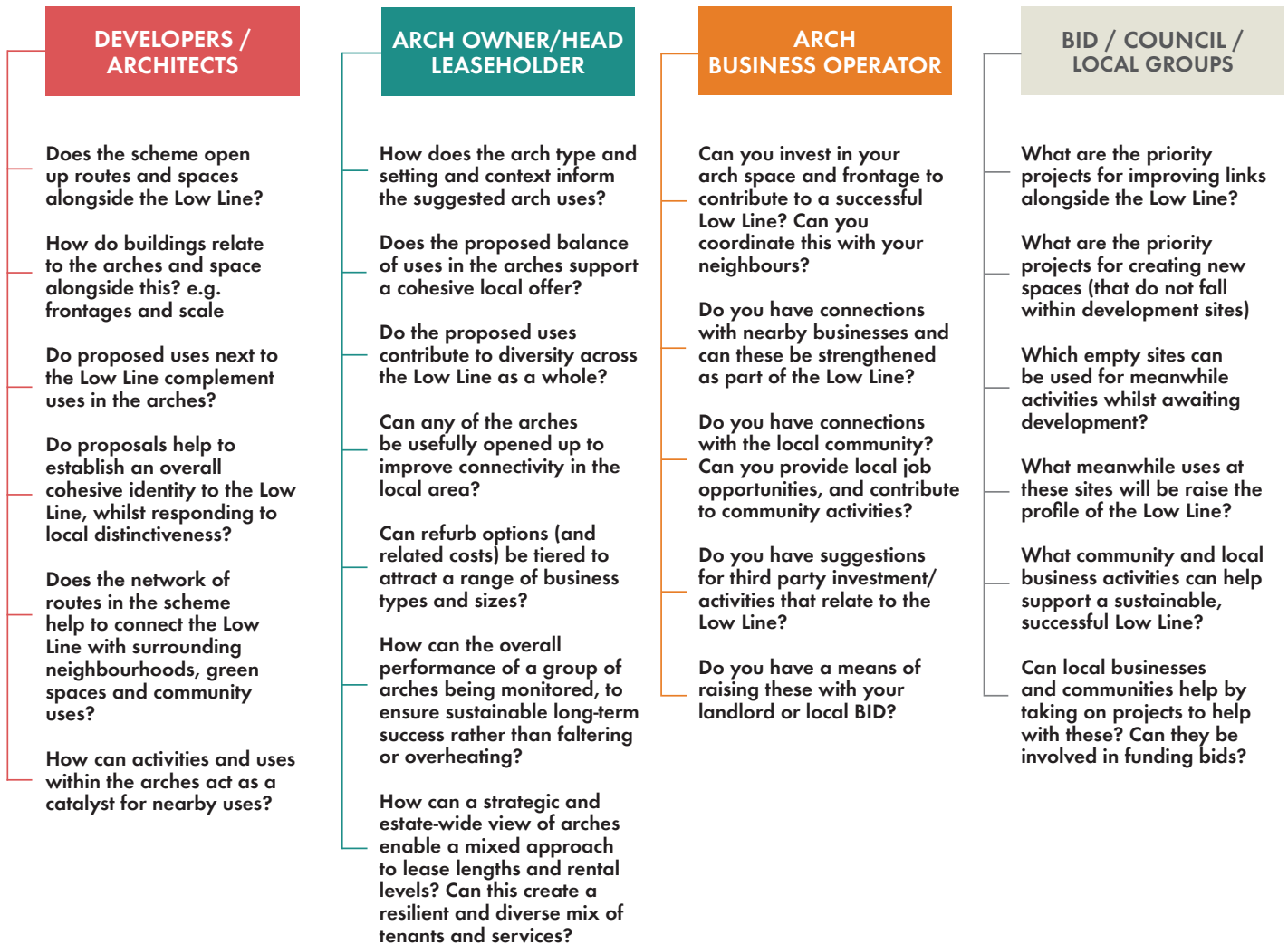
A diverse economy and balance of uses will create a more resilient low line.

The location of an arch in relation to the CAZ, Congestion Zone and ULEZ will inform suitable uses, as will the type of arch space, access, setting and aspect. These could be useful considerations as part of a lettings strategy.

Approaches, roles and responsibilities

Unlocking the long term success of the Low Line and its integration into the south London neighbourhoods it traverses will depend upon the inputs and actions of a number of people and organisations.

A number of key questions are set out below, which provide useful cues for key considerations that relate to the multiple partners involved in delivering a sustainable and resilient future for the Low Line.





_Low_Line

The Low Line Horizon Scanning study was commissioned by Better Bankside, Team London Bridge, Blue Bermondsey, The Arch Co. and Southwark Council. Undertaken by Allies and Morrison Urban Practitioners with Hatch Regeneris. The study sets out the varying characteristics of the Victorian railway viaducts, the uses and activities they are home to, and the neighbourhoods they traverse.

The Low Line Partners

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