

# Transport Needs and Opportunities Assessment

November 2024





This report was produced by ekosgen on behalf of Local London

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## Foreword

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The nine boroughs that make up the Local London sub-region are the fastest growing part of the capital; north and south of the river there is huge potential for growth that benefits everyone in our dynamic sub-region, which in turn will benefit London and the country as a whole.

To fully unlock this potential, we need the infrastructure and connectivity to support it. Across our sub-region we have already begun working with public and private sector stakeholders to advance digital connectivity; alongside this our attention is focussed on enhancing transport connectivity.

For a number of years, investment in transport has not matched growth in our boroughs. This is holding up building much-needed housing and amenity, adversely affecting access to jobs and health services, and leading to high levels of car usage, which is negatively affecting air quality.

These issues affect us all, but the impacts are most especially felt by our in-need communities. Stalling transport investment is not an option.

In view of the Government's recent Industrial Strategy and the Mayor of London and London Councils' Growth Plan for London and London Infrastructure Framework, as well as our own refreshed Vision for the sub-region, this report couldn't be more timely and all of these policy drivers acknowledge the important role that infrastructure investment will play in facilitating growth.

Collectively, we have identified 15 priority investment projects that could transform the lives of people and businesses who call our sub-region home.

This report from Ekosgen sets out the socio-economic benefits that each of these projects could catalyse. Using this insight, our Growth Board will look at how we can focus our advocacy and drive investment to maximise inclusive growth across the sub-region, a pillar of our new Vision.

The report's findings create a foundation for our ongoing discussions with Government, both national and regional, championing these investments. This report will complement the themes and ambitions in the London Growth Plan which shares our commitment to sustainable and inclusive economic growth that will benefit people throughout London.

Our thanks to borough officers and TfL who have been hugely supportive with this study.

With this appraisal of the sub-regional opportunities and challenges ahead, we will fortify our case for urgent transport investment to achieve the potential of this part of the capital, London's leading edge.

**Mayor Rokhsana Fiaz OBE,**

Chair of Local London's Growth Board and Mayor of Newham



## Executive Summary

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### Context

Earlier this year, Local London published a **Transport Policy Position** to set out the 15 key strategic transport priorities which are vital to unlocking housing and employment opportunities in the sub-region.<sup>1</sup> The identified investments include:

- A13 and South Barking Improvements
- Bakerloo Line Extension
- Beam Park
- Elizabeth Line to Ebbsfleet
- Enfield to Liverpool Street Overground
- Lower Thames Crossing
- Rail Devolution and Metroisation
- River Roding Crossing
- Stratford International
- Stratford Station
- Superloop
- Thames ferry crossings
- Thames piers and wharves development
- Thamesmead & Beckton Riverside Public Transport Programme
- Walthamstow Central

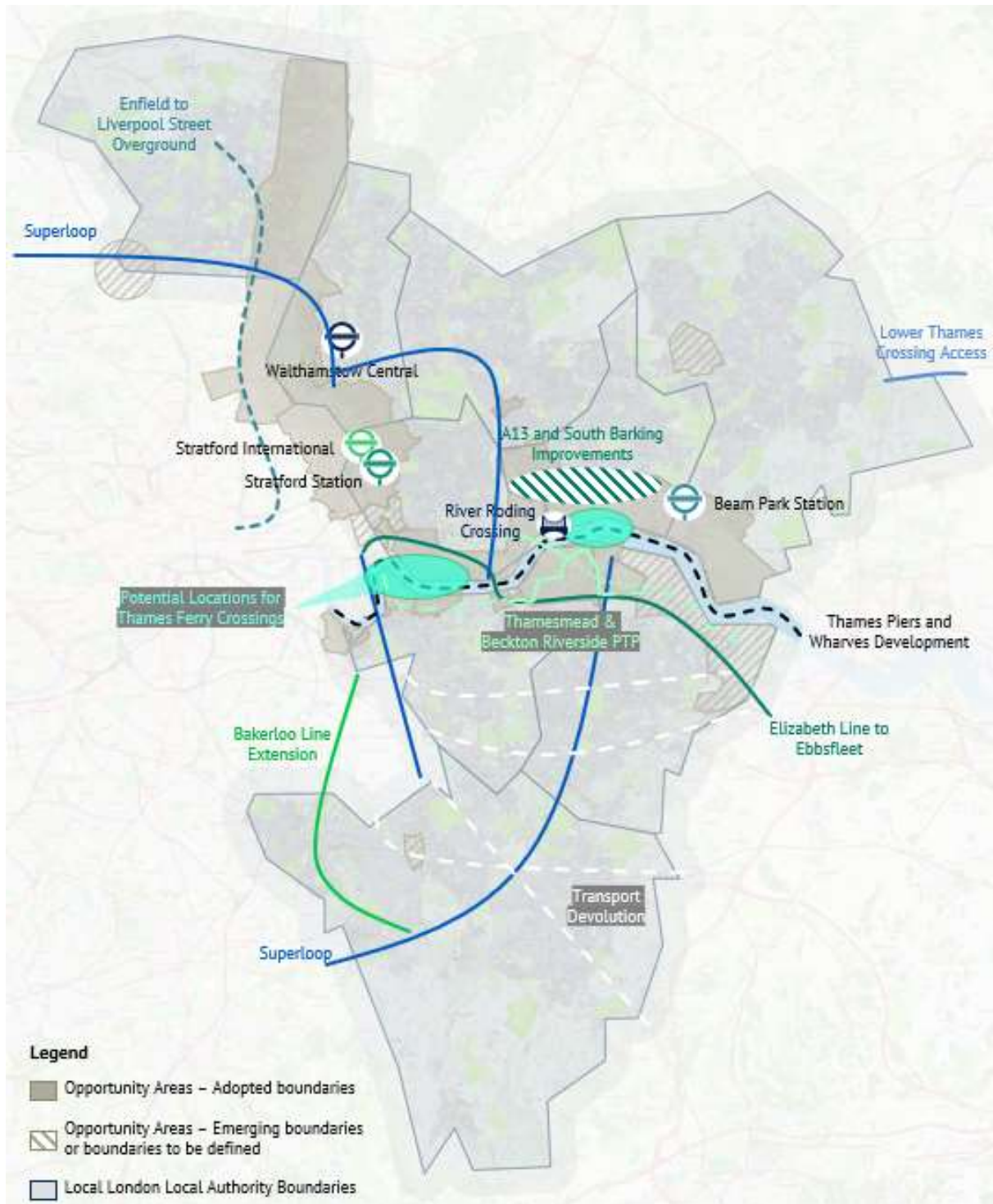
Local London commissioned this report to consider the growth benefits associated with each of their key strategic transport priorities, how these investments align with broader investment and growth priorities of the sub-region, and what additional investment may be required to deliver the longer-term growth aspirations of the sub-region.

Using the existing evidence available for each project, we have identified a broad range of economic impacts that are expected if projects are delivered. Individually and collectively, the projects will help to deliver economic outcomes for the sub-region by contributing to increased economic output, improved productivity and improved wellbeing and quality of life for residents and visitors to the sub-region.

Below we provide a map of the projects.

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<sup>1</sup> [Local-London-Transport-Policy-Position-Paper.pdf](#)



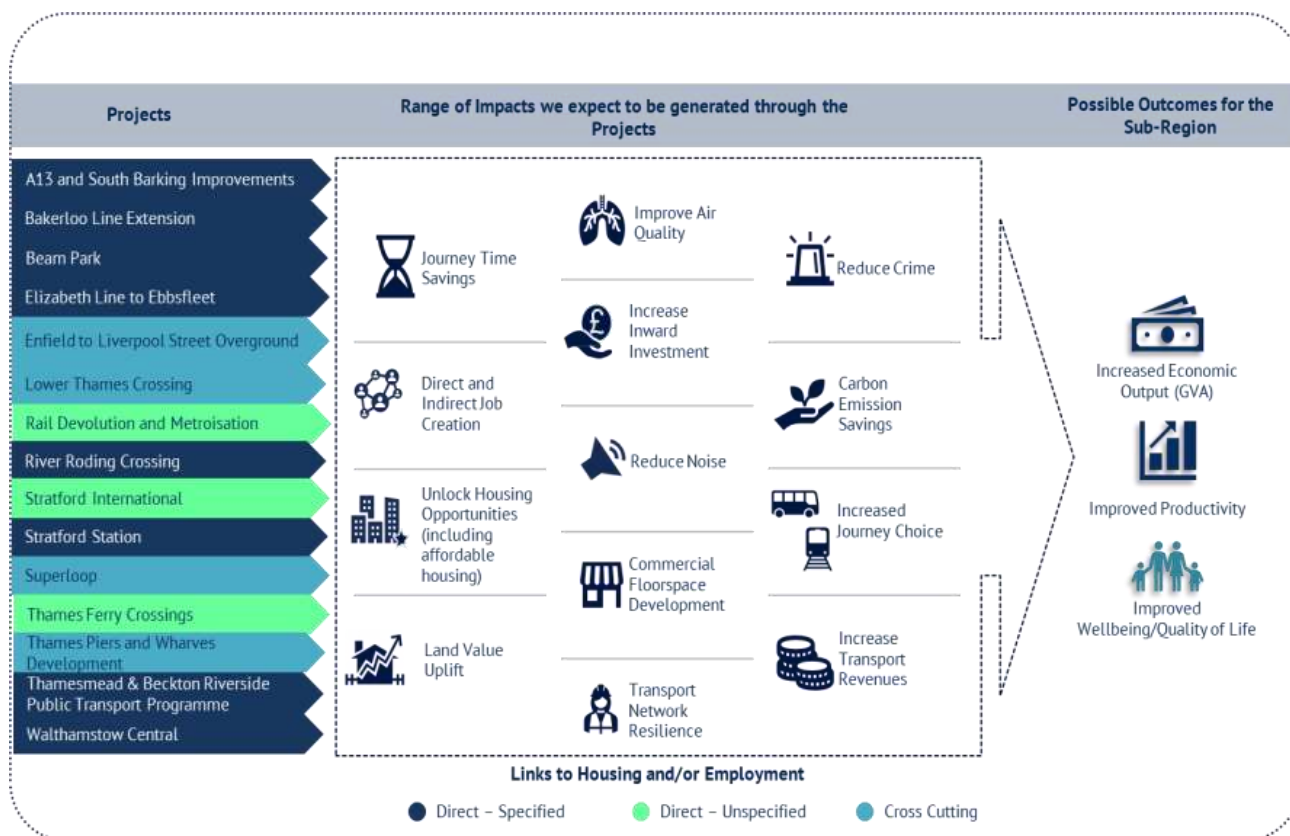
## Project Benefits

The mechanism by which the transport interventions will drive sub-regional impacts and outcomes will differ by project. We have categorised projects based on their expected 'path' to growth:

- Projects which **directly unlock** or enable specific sites for housing and/or employment
- Project which **support housing and/or employment**, but where links to specific sites are not established at this stage

- Projects providing a more general or **cross-cutting contribution to growth**.

The infographic below shows how each project has been categorised and summarises the range of benefits expected to be generated through the projects. Chapter 4 summarises the impacts expected for each project in further detail.



## Sub-regional Growth Opportunities

The Local London sub-region has the potential to make a significantly greater contribution to the London and UK economy. It has the fastest growing population in London and is **home to a large proportion of London's Opportunity Areas** – which are key locations with potential for new homes, jobs and infrastructure of all types that are expected to drive growth in coming years.

There are ten adopted Opportunity Areas within the sub-region, including Charlton Riverside, Greenwich Peninsula, Olympic Legacy, Ilford, Lee Valley, London Riverside, Royal Docks and Beckton Riverside, Thamesmead and Abbey Wood, Woolwich and Deptford Creek/Greenwich Riverside. Collectively, these areas are **projected to deliver around 183,500 new homes and 174,500 jobs**. There are a further five emerging Opportunity Areas within the sub-region.

While being home to many of London's Opportunity Areas demonstrates the potential for significant growth, it also represents a challenge. These brownfield sites – many of which were home to former industrial locations – are **not well served by the strategic and social infrastructure** required for high-quality and sustainable mixed use and residential neighbourhoods. This impacts on the viability of development.



Many of the 15 priority transport projects are located near to, or within, Opportunity Areas and will play a **key role in addressing infrastructure gaps and supporting these regeneration ambitions**. In some areas, projects are expected to complement each other to collectively drive growth, whereas some projects are expected to have impacts across multiple Opportunity Area boundaries and therefore play a valuable role in linking up these strategic opportunities to generate greater impact.

## Borough Opportunities

Many boroughs in the Local London sub-region **face transport infrastructure challenges that are constraining growth**. Some of these are provided below.

- Like other parts of Outer London, many boroughs are **poorly served by public transport**, resulting in a high proportion of trips by car. This presents challenges when seeking to build at higher density or in a sustainable way.
- **North-South movement across the sub-region is constrained** by the limited number of Thames crossings, which restricts movement (particularly walking and cycling) and results in significant congestion in areas where crossings do exist.
- While much of the sub-region is well served by national rail infrastructure – these **routes often do not provide the metro style ‘turn up and go’ services expected** across much of the London network and by providing links to London Terminals, access into and across London is more restricted than areas better served by TfL services.

In Chapter 5 we consider each borough’s local growth ambitions and the role of transport interventions to support these. The **priority transport projects would play a key role in contributing towards and driving borough ambitions**, particularly relating to housing and employment growth.

However, boroughs have **additional local transport ambitions**. While some of these wider ambitions are larger scale, for example the Ilford Western Gyratory, some are smaller scale, such as active travel improvements or the expansion of bus services that do not require significant new infrastructure. These smaller local schemes have potential to **(i) deliver significant localised benefits in the shorter term and (ii) complement and expand the impact of the more significant transport investments**.

## Recommendations

Looking ahead, it will be important for Local London, its boroughs and partners to continue to **make the case for the supporting and enabling investments** if local, sub-regional and London-wide ambitions are to be delivered on.

Local London and its partners may wish to **consider prioritising the 15 priority projects**. Given the varying degrees of project development, this could be one factor against which prioritisation could be considered. Another factor may be the extent to which projects are identified as directly enabling sites or areas for growth. Local London may decide that other factors are important and since the Government and the Mayor of London’s priorities are still being developed, boroughs may also wish to take a view on priorities once this has become clearer.

While it is important to maintain a focus on the larger and more strategic transport investments as these will take significantly longer to plan and implement, **the value of smaller local schemes should not be overlooked**.



While much of this activity on smaller schemes can take place at a borough level, **there may be a role for boroughs to co-ordinate activity where such schemes cross, or are located close to, borough boundaries** and therefore have the potential to impact multiple areas.

In addition, it is important to **recognise that the list of priority projects will evolve over time**. The development of the Growth Plan for London could provide new priorities for driving sustainable and inclusive economic growth. New priorities will be acknowledged as additional development locations are identified and it is important that where investment is made, consideration is given to these longer term opportunities.

# 1 Introduction

## Background

Local London is one of London's four sub-regional partnerships working across nine London boroughs covering North East and South East London: Barking & Dagenham, Bexley, Bromley, Enfield, Greenwich, Havering, Newham, Redbridge, and Waltham Forest.

**Figure 1.1** Map of the Local London sub-region



Source: Local London

The **Local London plan 'Towards 2026'** outlines the partnership's proposed activities to: <sup>2</sup>

- Act as a resource for partners to bid for external funding that can support the partnership's objectives and benefit from scale and coordination.
- Deliver a set of programmes on behalf of Local London partners to support activity in agreed areas.
- Provide data and analysis into the needs of the sub-region to influence effective policies for places and people to support the development of North East and South East London.

<sup>2</sup> [Local London Plan - Towards 2026](#)

- Speak up for the sub-region on issues that affect Local London partners.
- Promote the sub-region to public and private investors and serve as a catalyst for inward investment.

Earlier this year, Local London published a **Transport Policy Position** to set out the 15 key strategic transport priorities which are vital to unlocking housing and employment opportunities in the sub-region.<sup>3</sup> This paper was agreed with individual boroughs and presented to both the Growth and Recovery Board and Local London's Joint Committee.

This report builds on the Policy Position paper by considering the growth benefits associated with each of the key strategic transport priorities, how these investments align with broader investment and growth priorities of the sub-region, and what additional requirements there may be to address longer-term investment priorities.

## Ekosgen's Approach

Our approach is based on a literature review of the publicly available evidence on the impacts of the 15 priority projects, as well as evidence shared with ekosgen for the purposes of this assessment and discussions with the teams involved in project development.

We have quantified the scale of benefits that could be delivered where this evidence exists and can be shared publicly. Where this evidence is not available, we set out the potential impacts on a qualitative basis. Given the breadth of activities, the varying stages of project development and associated evidence, and the potential for double counting of impacts, it is not possible to aggregate impacts.

To develop further qualitative evidence on future needs and priorities we also consulted with key stakeholders, including representatives from Local London's boroughs and key strategic partners including TfL, GLA, MHCLG, DfT and the Thames Estuary Growth Board.

## Report Structure

The report is structured as follows:

- **Section 2 – Why Invest in the Local London sub-region:** setting out the economic context and priorities for the Local London sub-region, as well as the regional and national priorities concerning transport as a driver of economic growth.
- **Section 3 – Overview of Investments:** setting out concise descriptions of the 15 priority transport projects identified by Local London.
- **Section 4 – Project Benefits:** setting out how the 15 priority transport projects are expected to drive economic growth at the sub-regional level and beyond, and the expected scale of benefits unlocked.
- **Section 5 – Growth Opportunities:** setting out sub-regional and borough level opportunities for growth, how these relate to the 15 priority transport projects, and where wider or longer term transport investments are required to deliver achieve these ambitions.

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<sup>3</sup> [Local-London-Transport-Policy-Position-Paper.pdf](#)

- **Section 6 – Conclusions:** setting out the implications of the work to date and proposed next steps for Local London.

## 2 Why Invest in the Local London sub-region

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### Economic Context

The economic potential provided by the Local London sub-region is significant. It has the ***fastest growing population of any sub-region in Greater London***, with average population growth of over 10% between 2011-2021 and with six of its nine boroughs growing faster than the London average (7.7%). Greenwich, Havering, Newham and Redbridge have all achieved population growth of more than 10% over this period, while Barking & Dagenham grew at 17.6% - the third highest rate in London.

Over the same period, the ***employment base in the sub-region increased by 173,000 new jobs*** – which is in line with the rate across London (of 2.1%).

While the legacy of the pandemic and increased prevalence of home and hybrid working will have impacts on commuting levels and patterns, these remain important when considering future growth opportunities. Like most London boroughs, particularly those in Outer London, data from the 2021 Census highlights significant out-commuting as residents travel to Central London and other employment centres for work. With housing growing at a rate five times higher than employment over the ten years to 2021, such trends will have increased over this period. While hybrid and more flexible working may help to tackle pinch points associated with high levels of congestion on existing routes, ***the availability and frequency of journeys connecting people to their places of work will remain critical to unlocking development.***

It is important to recognise that commuting patterns are also not in a single direction. While the net position is that Local London residents are more likely to commute out of the sub-region for work, many people also commute into the sub-region which highlights the ***complex interplay of trips that must be accommodated at a sub-regional level.***

Recognising the Outer London nature of much of the Local London sub-region – where boroughs are generally larger and less well served by public transport – ***car use for commuters is higher than the London average*** in six out of the nine boroughs. Usage is particularly high in Havering and Bexley where 40% and 39% of residents respectively travel to work by car, van, or taxi compared to a London-wide figure of 23% (see Annex 1).

In addition to commuting by road, the sub-region can expect to see a ***significant increase in freight movements*** within and across the sub-region. Over the next few years, ports in the South East and East of England will experience considerable expansion in capacity, with Felixstowe expected to double in capacity by 2030, the Port of Dover and the DP World London Gateway expected to expand, and Tilbury expected to quadruple in size. Much of the additional freight will be travelling along arterial routes passing through the sub-region – including the A13, A12 and A2.

In this context, most boroughs are considering and implementing a wide range of ***sustainable transport measures***, albeit in the face of finance and capacity challenges. As this investment comes with substantial risk and challenges to the local authority it is important that boroughs are supported to deliver on their ambitions. Recent examples cited by Local London for where this has worked well include the Woolwich Dockyard Station and Stratford station.

## The Local London Position

The **Local London Plan 'Towards 2026'** outlines the vision for the sub-region to become the most exciting part of the capital to live, study and work in.<sup>4</sup> The core ambitions for Local London are:

- To provide a strong voice for the sub-region; and
- To maximise investment into the fastest growing part of London

To achieve its ambition, Local London identifies a series of priorities relating to better digital and transport connectivity; a better skilled workforce; and raising the ambitions of the future workforce. These lead to the key pillars in the Local London plan of People, Place and Sustainability.

With these pillars in mind, Local London developed their **Transport Policy Position**<sup>5</sup> setting out the key sub-regional transport priorities. This document does not aim to supersede any individual borough plans or pan-London plans, instead it brings together priorities that have an impact across the sub-region or have a wider significance with a view to bringing boroughs' collective voices to bear on those priorities. Key regional trends driving transport infrastructure identified in the paper include:

- Significant demographic change and high population growth in Local London boroughs than London and national averages
- Significant jobs growth over the past decade
- Significant levels of in- and out- commuting
- Car use is higher than the London average in 8 out of 9 Local London boroughs, particularly in the outer boroughs where there are fewer public transport options
- Lower rates of house building, with parts of South London seeing half that of the rest of London due to poor transport connections.

While individual boroughs will have their own transport priorities and issues, Local London's collective voice has considerably more power. Their sub-regional asks include:

- Accelerated delivery of key transport infrastructure investments to support the growth of this sub-region
- Advocating for levelling up and sustainability criteria to be at the heart of transport appraisal decisions
- Devolution of rail planning and delivery for London by London

The paper identified 15 key strategic transport investments that are vital to unlocking housing and employment opportunities for residents.

## Sub-regional Priorities

Local London's growth and transport ambitions align well with wider priorities and strategies in London and the South East.

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<sup>4</sup> [Local London Plan - Towards 2026](#)

<sup>5</sup> [Local-London-Transport-Policy-Position-Paper.pdf](#)

The Greater London Authority (GLA) has a clear commitment to sustainable economic growth. The GLA aims to create sustainable, inclusive communities where people can live, work and thrive. Included in this ambition is the acknowledgement that social inequalities need to be addressed and the quality of life for all Londoners needs to be improved. The **Mayor's Transport Strategy** has a central aim for 80% of all trips in London overall to be made on foot, by cycle or using public transport by 2041.<sup>6</sup> The Strategy is also focused on achieving outcomes under three key themes: healthy streets and healthy people; a good public transport experience; and new homes and jobs.

The **London Plan** sets out the Spatial Development Strategy for Greater London. The 2021 London Plan explains that a crucial part of London's future success will be improving access within and into the capital, highlighting the important role of major transport infrastructure.<sup>7</sup> It can act as a vital catalyst for new areas for development and the delivery of housing and employment, promoting higher densities and creating vibrant neighbourhoods. An updated London Plan is in development, with consultation planned for 2025.

The Mayor and London Councils are currently developing the **London Growth Plan**, which will be a concise, action focused document that sets out how London will aim to drive sustainable and inclusive economic growth. The Plan is expected to focus on raising living standards for low- and middle-income Londoners to ensure broader participating in London's economic success. The plan will identify several core priorities, including to help local economies thrive by addressing under-investment in parts of the city. A key priority is expected to be building for growth and net zero, which includes accelerated public transport infrastructure and unlocked land for development.

The sub-region is also geographically well placed to benefit from the UK's biggest growth opportunity in the Thames Estuary region of North Kent, South Essex and East London. The **"Green Blue"** action plan sets out the Thames Estuary Growth Board's ambitious vision for transforming the region, which includes ambitions to use the Thames to its full potential. This includes delivering job growth, transport infrastructure, inward investment, housing expansion, green energy infrastructure, and a workforce ready to meet emerging challenges and opportunities.<sup>8</sup> The sub-region is also hoping to build on opportunities provided by the **Thames Freeport**, which is receiving up to £25 million of seed funding from Government to drive growth in the UK's advanced manufacturing, biomanufacturing, logistics and low carbon industries. A range of benefits are available at three tax sites, including the Ford Dagenham Engine Plant, Tilbury and London Gateway. The Freeport is expected to encourage £4.5 billion of investment and create 21,000 skilled jobs.

The sub-region leverages the advantages of the **UK Innovation Corridor** that connects **London and Cambridge**. It includes the GLA, Cambridge and Peterborough Combined Authority (CPCA), three counties<sup>9</sup>, three London Boroughs<sup>10</sup>, four district councils<sup>11</sup> and one city and borough council<sup>12</sup>. This includes the Local London boroughs of Enfield and Waltham Forest. According to the Innovation Corridor Growth

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<sup>6</sup> [Mayor's Transport Strategy \(london.gov.uk\)](https://www.london.gov.uk/transport/mayors-transport-strategy)

<sup>7</sup> [the\\_london\\_plan\\_2021.pdf](#)

<sup>8</sup> [The Green Blue action plan - Thames Estuary](#)

<sup>9</sup> Essex, Hertfordshire, and Cambridge

<sup>10</sup> Camden, Enfield, and Waltham Forest

<sup>11</sup> East Herts, Epping Forest, South Cambridgeshire, and Uttlesford

<sup>12</sup> Cambridge City Council and Stevenage Borough Council.



Plan<sup>13</sup>, the entire corridor's Gross Value Added (GVA) is projected to rise significantly from £189 billion in 2024 to £350 billion by 2040. This growth is expected to be accompanied by the creation of 400,000 new jobs between 2024 and 2036, with 200,000 of these positions in the tech, life sciences, and knowledge sectors. Additionally, the Corridor is anticipated to continue leading productivity growth in the UK, with GVA per hour worked being 20% above the national average.

## National Priorities

The new Government's priorities are still in development following the July 2024 election. These priorities will be an important factor determining the funding and regulatory landscape that will shape the location and focus of growth ambitions, as well as the amount of investment available for transport infrastructure. Insights to date suggests there will be a focus on addressing the UK's housing shortage, using transport infrastructure as a driver for economic development, and reforming planning regulations.

The new Government has outlined ambitions to deliver 1.5 million new homes over the next Parliament and they are consulting on changes to the **2023 National Planning Policy Framework (NPPF)**.<sup>14</sup> Some of the proposed changes include:

- A new methodology for calculating housing need, which removes the previous cap on housing need totals and makes the new standard method mandatory once more. This leads to an estimate of annual housing need for England of 371,541 homes.
- Introducing a "grey belt" category for lower-quality Green Belt land to allow more land to be brought forward for development, especially for affordable, well-designed homes, where development needs cannot be met by other means.
- Take a brownfield first approach and broadening the definition of brownfield land.

The Government has also highlighted ambitions for the development of new towns and have established an independent New Towns Taskforce.<sup>15</sup> The new towns programme aims to provide new large-scale communities built on greenfield land, as well as urban extensions and regeneration schemes in existing areas.

These early insights suggest that Local London's ambitions, including the 15 priority transport projects, are well aligned to the new Government's priorities and could play a key role in helping to meet national housing and growth ambitions.

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<sup>13</sup> [UKIC-Growth-Plan-2024-2030.pdf](#)

<sup>14</sup> [Proposed reforms to the National Planning Policy Framework and other changes to the planning system - GOV.UK \(www.gov.uk\)](#)

<sup>15</sup> [Policy statement on new towns - GOV.UK \(www.gov.uk\)](#)

### 3 Overview of Investments

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Below we provide an overview of the key strategic transport projects identified by Local London as being vital to unlocking housing and employment opportunities for residents.

In 2022, at the request of Local London's Growth and Recovery Board, Local London completed a small research project to understand the shared issues and priorities that could potentially inform a sub-regional transport strategy and partnership. This was developed further through a workshop with borough officials in the spring of 2023 which identified a list of major transport projects with **sub-regional significance** which represented priority investments for the sub-region. This list of projects has been developed further with boroughs over time to reflect current need and status.

#### Investments in Scope

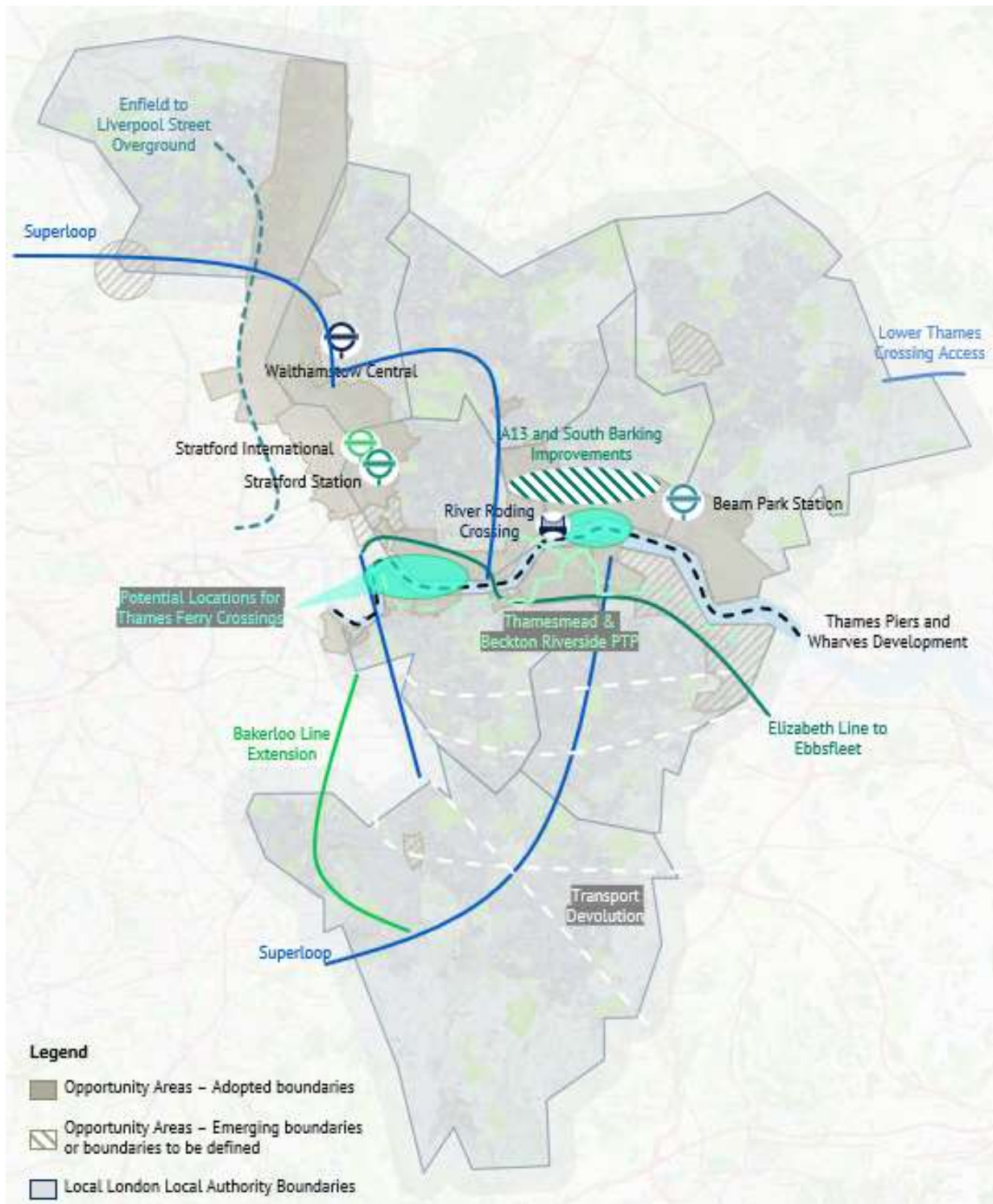
The investments identified in the Local London **Transport Policy Position**<sup>16</sup> cover a broad range of projects covering different transport modes at varying stages of development. These are:

- A13 and South Barking Improvements
- Bakerloo Line Extension
- Beam Park
- Elizabeth Line to Ebbsfleet
- Enfield to Liverpool Street Overground
- Lower Thames Crossing
- Rail Devolution and Metroisation
- River Roding Crossing
- Stratford International
- Stratford Station
- Superloop
- Thames ferry crossings
- Thames piers and wharves development
- Thamesmead & Beckton Riverside Public Transport Programme
- Walthamstow Central

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<sup>16</sup> [Local-London-Transport-Policy-Position-Paper.pdf](#)

Figure 3.1 Map of Priority Transport Projects



## Project Descriptions

### A13 and South Barking Improvements

The A13 is one of the busiest arterial routes into London, connecting Central London and Essex and running the length of the Thames Gateway. The route suffers from significant congestion and creates severance issues for Barking & Dagenham, impacting on residents and businesses and restricting opportunities for development.

The package of investments is proposed to address these issues. The replacement of the outdated Lodge Avenue Flyover is being progressed, subject to planning and the proposals for the wider package include constructing new green bridges, enhancing the Lodge Avenue and Renwick Road junctions, a proposed new station at Castle Green, and improved north-south bus links to bolster transportation options and reduce traffic on the A13. Options under consideration also include developing Box Lane into a fit-for-purpose intermodal rail freight terminal with an adjacent stacked logistics and fulfilment hub.

### Bakerloo Line Extension

The Bakerloo Line faces significant challenges, relying upon 50-year-old rolling stock and signalling in need of upgrade. In comparison to other major London underground lines, the Bakerloo Line significantly under-performs against its potential capacity. Current plans for a Bakerloo Line upgrade propose replacing the full fleet of existing rolling stock and improvements and modernisation of signalling equipment. Of direct relevance to Local London, TfL are also considering plans to extend the Bakerloo Line from its current terminus in Elephant and Castle to connect some of London's least served areas to the tube network. The current plans involve extending the line as far as Lewisham, with a suggested further possible extension into Bromley making use of existing rail lines and terminating at Beckenham Junction and Hayes.

### Beam Park

Beam Park Station is a planned railway station on the Essex Thameside Line between Dagenham Dock and Rainham stations. The station is set to serve the new Beam Park neighbourhood in the south of the London Boroughs of Barking & Dagenham and Havering and to provide the terminus for bus routes 165 and 365. The construction costs for the station will be met by developers in the area and the GLA. The station received planning permission in February 2019, but the project requires updated transport modelling to be completed (including updated post-covid passenger data and cost assumptions) before an agreement with the train operator to introduce new passenger services can be progressed.

### Elizabeth Line to Ebbsfleet

The Crossrail to Ebbsfleet (C2E) Partnership was formed in 2016 as an informal group of authorities to promote an extension of the Elizabeth Line beyond its current terminus at Abbey Wood towards Ebbsfleet as originally planned. The proposed extension would serve stations in Bexley at Belvedere, Erith, and Slade Green. Through the provision of new routes into and through London in addition to the existing Thameslink and Southeastern services, this is expected to create faster, more reliable links into central London from South East London and north Kent.

## Enfield to Liverpool Street Overground

London Overground runs services into and out of Liverpool Street, splitting to the north of Edmonton Green, with one branch continuing to Enfield Town and the other to Cheshunt. The service pattern in peak times is four trains per hour on the Enfield Town branch and two trains per hour on the Cheshunt branch. At off-peak times, the Enfield Town branch currently drops to two trains per hour. There is an opportunity to enhance off peak frequencies on weekdays to even out the services to three trains per hour on both the Enfield Town and Cheshunt branch.

## Lower Thames Crossing

National Highways is proposing a significant infrastructure scheme to deliver a new river crossing east of the existing Queen Elizabeth Bridge connecting Kent and Essex. The Lower Thames Crossing would provide a new connection between the A2/M2 in Kent and the A13 in Essex via a twin-bored tunnel under the Thames. A new three lane northbound and two-lane southbound road will then connect through to the M25 between junctions 29 and 30 within Havering. This would nearly double cross-river capacity, aiming to reduce congestion at the existing Dartford Crossing and provide free-flowing north-south capacity.

## Rail Devolution and Metroisation

TfL has put forward proposals for Southeastern Metro services and other rail services to be devolved to TfL from the Department for Transport. This transfer would enable the "metroisation" of rail lines in South Central and South East London, as well as parts of Surrey, Kent, and North London. Metroisation aims to create more frequent, reliable, and integrated rail services – a 'turn up and go' service – which will support housing growth and increased development density around stations. In March 2023, the London Assembly passed a motion to reiterate its longstanding support for the devolution of local train services so as to "provide a truly integrated, reliable and affordable rail network for Londoners", a call supported by the Mayor.

## River Roding Crossing

The River Roding is a barrier to east-west movement between Newham and Barking. Improving connectivity across the river has the potential to unlock development by better linking areas to existing and proposed transport infrastructure and by providing improved connectivity more generally.

In particular a new crossing at Lower Roding, to the south of the boroughs will provide residents of new communities at Barking Riverside with access to the proposed new DLR station at Beckton Riverside (part of the proposals for the DLR extension to Thamesmead).

Over the longer term, further crossings of the Upper River Roding to the north, have the potential to deliver additional connectivity improvements between Newham and Barking. One proposal would support wider aspirations to establish a DLR or tram link between Barking town centre and Gallions Reach.

## Stratford International

Stratford International station is located in Newham on the High Speed 1 (HS1) railway between London St Pancras International and Ebbsfleet International, which connects the UK with key continental European destinations. It was originally built as part of the upgrade of the Channel Tunnel line to act as the London stop for regional Eurostar trains bypassing St Pancras. However, these services did not materialise, leaving only domestic Southeastern trains serving the station. There is an ambition to introduce international high-speed rail services by utilising existing platforms and infrastructure, alongside investment in facilities such as check-in and border controls and accessibility improvements. Financial and non-financial incentives may be required to support the short-term viability of a new commercial operator.

### Stratford Station

Stratford Station is the sixth busiest National Rail station in Britain and the seventh busiest station on the London Underground network. It has been identified by TfL as one of four 'Strategic Interchanges,' major transport hubs whose transport connectivity and capacity should be harnessed and expanded. The station is forecast to experience congestion, delays and worsening journey times, especially during peak periods. Network Rail and TfL are investigating short- and medium-term interventions to divert passenger flows from pinch points at entrances, ticket halls, subways and staircases. A new southwestern entrance opened in Summer 2024. Further infrastructure improvements are required to enhance connections to surrounding developments and improve passenger flow. Subject to feasibility and viability considerations, design options may include new passageways and bridge connections as well as creation of new entrances.

## Superloop

Superloop is a network of initially ten express bus routes aimed at improving connections and journey times between key outer London town centres and transport hubs. The majority of the initial services have been operational since March 2024, involving a rebranding and upgrade to four existing express services, as well as five new express services. The remaining SL4 route between Canary Wharf and Grove Park will begin operating once the Silvertown Tunnel opens in 2025. Transport for London is also reviewing current demand areas for bus services **and** considering further Superloop services.

## Thames Ferry Crossings

The Port of London Authority and the Thames Estuary Growth Board have ambitions for three new low-cost, zero-emission Thames ferry crossings for pedestrians and cyclists. The three key routes identified include Isle of Dogs-North Greenwich, Royal Docks-Charlton, and Barking Riverside-Thamesmead. These crossings aim to ease pressure on public transport, improve connectivity, and support housing and commercial growth in key growth areas. The ferries would offer frequent and low-cost access and integrate within existing transport networks, as a cheaper and quicker alternative to new bridge infrastructure.

## Thames Piers and Wharves Development

The London Passenger Pier Strategy sets out the Mayoral and Port of London Authority's ambitions to use the full potential of the Thames to carry passengers, to integrate river services with the public transport system, walking and cycling networks, and to enable the transfer of freight from road to river.<sup>17</sup> 11 new piers are planned, including in Greenwich, Beckton and Barking, with services potentially extending into Kent. There are opportunities to provide a new river service for light freight goods to shift parcel deliveries from roads to the river, providing sustainable travel choices for freight operators and end customers. This would require the development and implementation of pier adaptation plans, as well as a distribution centre close to the river at Tilbury.

### Thamesmead and Beckton Riverside Public Transport Programme

Thamesmead and Beckton Riverside sit at the heart of the largest concentration of Opportunity Areas in London and are a priority for regeneration and economic development in the Thames Estuary. There are ambitions for an extension of the Docklands Light Railway from Gallions Reach to Thamesmead via a new station at Beckton Riverside with passive provision for a further extension to Belvedere at some point in the future. The delivery would facilitate a significant improvement to public transport connectivity across the area. The proposals include improved bus transit from the new station at Thamesmead to Woolwich and Abbey Wood (with a potential further expansion to Belvedere) and more broadly, while beyond the scope of the current business case, the proposals could support a Bus Rapid Transit link from North Greenwich to Slade Green. The proposals have the potential to unlock up to 25,000-30,000 homes and transform two major brownfield sites at Thamesmead Waterfront and Beckton Riverside.

## Walthamstow Central

Walthamstow Central Station is a sub-regionally significant transport interchange which includes the Victoria Line, two London Overground lines and London's third busiest bus station. The station has existing capacity and accessibility challenges which TfL's modelling demonstrates will increase in impact over the next decade. Through the Council's partnership with TfL and Capital & Regional, the regeneration of the nearby shopping centre has enabled planning permission to be secured for a new fully accessible entrance to the station. Further investment is required to complete construction of a new underground ticket hall and station entrance to meet current and future demand and unlock significant housing growth.

<sup>17</sup> [London's Passenger Pier Strategy \(tfl.gov.uk\)](https://tfl.gov.uk)



## 4 Project Benefits

The 15 priority projects are expected to deliver a broad range of economic impacts for the sub-region and beyond. Individually and collectively, these impacts will help to deliver economic ambitions for the sub-region by contributing to increased economic output, improved productivity and improved wellbeing and quality of life for residents and visitors to the sub-region.

Given the breadth of interventions considered, the mechanism by which the transport projects will drive these outcomes will differ by project. We have categorised projects based on their expected 'path' to growth.

**Figure 4.1: Project Categorisation**

### Projects which directly unlock or enable specific sites for housing and/or employment

- Projects where there is a direct link between the investment and the ability to bring forward a site
- Projects may be associated with a planning constraint or other specified dependency
- Or projects may facilitate delivery through other direct means (for example, access to public transport may improve sales values and/or development densities and enhance site viability to an extent that developments can come forward).

### Project supports housing and/or employment but links to specific sites are not established at this stage

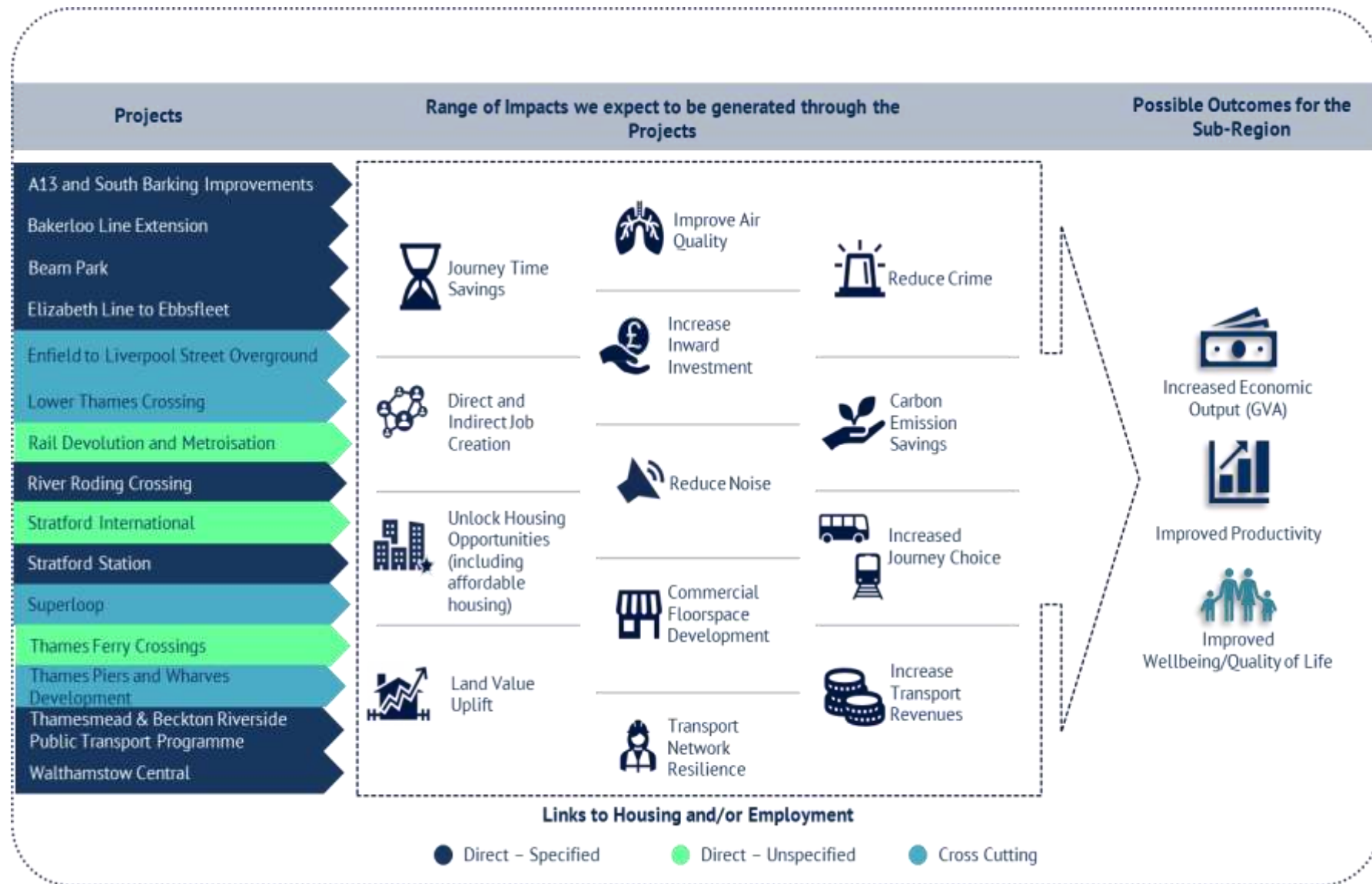
- Projects that provide transport improvement that will benefit a wider area.
- Housing and employment sites within the catchment area have the potential to benefit from these investments, even those that would come forward any way – e.g. by supporting higher densities or accelerating delivery.
- There may be the potential for some specific sites to be directly enabled (e.g. land is freed up for development, viability improves to the extent that developments can come forward, or planning conditions can be relaxed), however these sites have not been confirmed at this stage.
- There is the potential for these schemes to move to Category 1 as projects are further developed and specific sites can be identified.

### Projects providing a more general or cross-cutting contribution to growth

- Projects are not expected to enable specific sites for development (on a direct basis)
- However they help to meet the needs of a growing city and support growth more generally.
- Examples include general capacity improvements that are not specific to particular areas and improving the quality of life for existing and future residents.
- Project will support growth – particularly the quality of growth achieved – however, linking to specific housing and employment sites now or in the future will be challenging.

The categorisation of the 15 projects against these groupings is set out in the figure below.

Figure 4.2: Overview of Project Impacts



## Project Level Impacts

Each of the opportunity areas set out in Figure 5.1 (page 38) can be linked to one or more of the investment proposals and these are set out in greater detail below. We outline the specific benefits associated with each of the investments that can be identified from the available evidence which includes, for many, business cases and impact assessments. Where possible, we have quantified the scale of benefits that could be delivered and for all projects we have set out the key findings from the available evidence concerning the range of benefits expected and the areas that are most likely to benefit.

This assessment is based on a literature review of the evidence available publicly or shared with ekosgen for the purposes of this assessment, as well as conversations with those involved with project development.

### A13 and South Barking Improvements

#### Challenges Addressed

The A13 is one of the busiest arterial routes into London, providing a connection with Essex which runs the length of the Thames Gateway, a national priority for regeneration and growth. As the route passes through the sub-region it suffers from congestion and creates severance issues for local communities. These issues will become increasingly pronounced given the potential for development in areas to the south of Newham, Barking & Dagenham and Havering – parts of London bisected by the A13.

The investment proposals are for a package of investments to overcome these challenges. These include improvements to the carriageway, new junctions for joining and leaving the A13, new bus routes, and green bridges for walking and cycling to improve connectivity between communities north and south of the A13. These will collectively improve traffic flow along the A13, improve journey times and quality for local residents and businesses and create more liveable communities. The programme of proposed investments also includes a potential new station at Castle Green which will improve journey times into London and unlock land for development and the Box Lane intermodal freight terminal, a new rail freight hub connecting to Europe and Asia.

#### Impacts Unlocked

While the specific impacts unlocked will be dependent on the final package of investment taken forward, the potential impacts are wide-reaching and significant. By significantly improving transport connectivity and improving the quality of the local environment, the scheme is also expected to improve land values across the area. Low sales values for residential units have been identified as a major barrier to bringing forward development in this part of London as there is insufficient value in many schemes to fund site remediation and the provision of enabling investments alongside essential community and social infrastructure. Improving land values and addressing the major transport infrastructure constraints will improve the viability of developments and facilitate greater housing delivery.

The Barking Local Plan finds that, subject to the right conditions coming forward, Castle Green would be suitable for new major housing development with capacity for around 7,000 homes. The potential for 'thousands more' has also been identified in nearby areas and the proposals could support the creation of 1,200 new jobs. It is estimated that industrial floorspace in the area could increase by up to 70%, with the area providing in excess of 2.5 million sqm of industrial floorspace.

The package of investment proposal will also support the health and wellbeing of existing and new communities by addressing issues associated with severance, by improving air quality and by promoting active travel.

### Wider Considerations

In addition to directly unlocking sites for development, the investment proposals will support wider investment proposed in the area, including 21,000 new homes at Barking Riverside and over 20,000 new jobs at Thames Freeport.

Improved journey times and quality on the A13 will also support growth beyond the South Barking area and the proposals for a new freight hub are expected to strengthen trade routes, improve the speed, resilience, and security of supply chains (by relieving pressure on existing cross-Channel infrastructure including Dover, the M20 and M25), supporting nationally significant green infrastructure, offering significant regional and national benefits and helping to attract new inward investment into the sub-region.

There are strong links with other proposed transport investments in the sub-region. For example, investment will be required at Barking Station to deliver capacity upgrades to manage the expected growth in passengers and proposals for a Lower River Roding Crossing will support development in western parts of the impact area by improving connections to the proposed DLR route connecting Thamesmead and Gallions Reach via Beckton Riverside.

## Bakerloo Line Extension

### Challenges Being Addressed

Phase 1 of the Bakerloo extension will extend the existing underground line to Lewisham, with the potential for a Phase 2 extension into the sub-region – making use of the existing Network Rail line to Hayes (Bromley) with a spur to Beckenham Junction.

The extension proposals would deliver enhanced frequency, reliability and capacity of services to areas that are not currently well served by the mainline rail services and provide a direct link into and through Central London for areas where routes currently terminate at mainline stations, and therefore require passengers to change their mode of travel for onward journeys into central London and beyond. This would be complemented by an upgrade to the rolling stock as well as modernisation of signalling equipment, increasing frequency of service, boosting capacity and reducing impacts of future crowding. Journey times are expected to be dramatically reduced by the proposed investment – by up to **25 minutes** on certain routes.

### Impacts Unlocked

The Bakerloo Line Extension represents a longer term investment, with the tunnel to Lewisham expected to be open by the late 2030s. However, once construction begins, the new route is expected to accelerate and enable sites for housing and employment by alleviating potential transport capacity constraints to address a Grampian condition that is restricting development, and improving the viability of potential development (through a combination of higher development densities and by increasing demand).

It has been estimated that within Bromley the extension could unlock **2,750 new homes**, which would make a significant contribution to meeting housing need in the borough and support **270 new local**

**jobs<sup>18</sup>**. It is expected that 100,000 additional jobs would be accessible within 45 minutes of Hayes station once the scheme is delivered. This increases to over 500,000 additional jobs for areas around Beckenham and Elmers End.

In addition to journey time savings, benefits for the sub-region would include improved frequency and resilience of services, with new rolling stock providing improved reliability. By providing a new route into London (and one that doesn't terminate at a mainline station) it would deliver benefits for people both travelling into central London and those travelling around Bromley and South East London, enhancing the resilience of the network by providing alternative options for passengers. The proposals would also open up to 6 paths on other rail lines which could deliver wider improvements to areas served by Southeastern (potentially including Bexley and Greenwich) by providing opportunities for increasing the frequency of other services and opening up new route options.

More generally, the new route is expected to increase the attractiveness of public transport in areas served by the new route, which will reduce car dependency.

### **Wider Considerations**

In addition to the benefits set out above, the proposals would deliver significant benefits beyond the Local London sub-region – notably for Lewisham and Southwark through the Phase 1 extension, but also along the existing route through the proposed line upgrade.

Across the whole route, the scheme is expected to generate £1.5 billion in GVA per year from new jobs at unlocked sites across London and across the supply chain, and reduce carbon emissions by eliminating 20,800 daily car trips and introducing a more efficient rolling stock.

The extension is expected to enable 189,500 sqm of commercial floorspace and unlock 20,400 homes, and 9,700 Jobs (including those identified above for Bromley). Additional spending of £585 million per annum from residents new to the area is expected to support local businesses and investment. A further 86,000 new homes are expected to be supported in Opportunity Areas along the existing route.

The investment will release capacity on parallel lines and buses, alleviating congestion across the transport network.

## **Beam Park**

### **Challenges Being Addressed**

The location for the proposed Beam Park station is within the London Riverside Opportunity Area. While the area is located on the Essex Thameside Line between Dagenham Dock and Rainham stations and close to the A1306, the absence of public transport infrastructure presents a major barrier to growth. The area is described as being 'hostile to cycling and pedestrians' and much of the area close to the proposed station has the lowest public transport accessibility score (Public Transport Access Levels (PTALs) ranging from 1-2 across much of the area and falling to zero in some places).

The area suffers from deprivation with neighbourhoods around the proposed station classified as being among the 20-30% most deprived nationally. A report by Grant Thornton<sup>19</sup> sets out how Beam Park faces

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<sup>18</sup> Hatch, (2024), Moving London Forward (Bakerloo Line Upgrade and Extension)

<sup>19</sup> Grant Thornton, (2022), The Case for Investment in Beam Park Station

significant challenges including an ageing population, a low-skilled workforce, high education deprivation, low productivity, and rising demand for affordable housing.

### **Impacts Unlocked**

A new station at Beam Park would deliver significant local benefits through improved public transport connectivity. 3,947 new homes are proposed at Beam Park, of which 1,572 are directly dependent on the station's development. A further 2,400 new homes are proposed at the A1306 and 90 New Road development plots, which would also be supported by the new station.

More widely the new station is expected to increase wider land values within a 20-minute walking distance of the station by £69 million (£65 million for residential and £4 million for commercial properties) as a result of the increased demand associated with improved transport connectivity. This provides a measure of the benefit accruing to the 177 existing commercial properties and 4,621 existing residential properties that are located within the catchment area for the station. This does not capture the potential benefit associated with other undeveloped sites or sites with the potential for redevelopment within the station catchment area, however the general uplift in values arising from the station has the potential to support future developments, particularly where sites for development are deemed unviable based on current values.

By increasing the take up of public transport and reducing car dependency, the station is projected to decrease carbon emissions by approximately 4.5 million kgCO<sub>2</sub>e annually, delivering an estimated economic value of £1.1 million per year.

The investment will also enhance access to the Thames Freeport tax zone at Ford Dagenham, a region anticipating significant employment expansion and, as a result, has the potential to support inward investment into the sub-region.

### **Wider Considerations**

The station will support the London Riverside Opportunity Area's target of creating 29,000 new jobs by 2041. By providing a new access point to the National Rail network, it will also alleviate congestion on nearby rail and buses routes facilitating wider growth opportunities.

## **Elizabeth Line to Ebbsfleet**

### **Challenges Addressed**

The Abbey Wood to Ebbsfleet Corridor covers the Local London local authority of Bexley, as well as Gravesham and Dartford. In Kent, the Corridor has potential to build on its existing strengths and diversify its economy but needs to improve transport links to make it happen. The existing rail network is capacity constrained and complex, with low frequencies for journeys to Abbey Wood and DLR interchanges from Dartford and points east; slow journey times by rail and bus; rail and Strategic Road Network resilience challenges and high car dependency.

Housing delivery in the Corridor is not currently expected to meet the Government's Local Housing Need estimates. The average five-year housing delivery levels would need to increase by 260% to meet these targets. While the Corridor has large areas of underutilised, brownfield sites, many sites are complex and cannot be brought forward for housing by the market alone due to viability challenges, in part caused by poor transport connections which limits land values.

## Impacts Unlocked

The C2E Partnership<sup>20</sup> have undertaken significant evidence gathering to understand the potential impacts unlocked. They have found the Elizabeth Line extension has potential to unlock significant housing around existing and upgraded stations due to transport investment making the local area more attractive. The C2E Partnership have modelled three route options in their Strategic Outline Business Case resulting in housing estimates ranging from between 5,000-8,000 to 24,000-29,000 homes. These units are in addition to the current commitments in Local Plans and at Ebbsfleet Development Corporation.

The extension is also expected to support jobs growth due to enhanced connectivity, additional commercial floorspace and through jobs to support the new population. Impacts range from 7,000 to 21,000 jobs.

In total, monetised benefits have been estimated at between £0.8bn to £2.2bn across the UK, depending on the route option chosen. These estimates include:

- Land Value Uplift from new homes and commercial floorspace
- Wider economic impacts, including:
  - Carbon emission reduction
  - Social value from local employment growth, increased social housing and green infrastructure
  - Transport user impacts (journey time benefits and marginal external costs of mode shift by highway users) and transport reliability

The UK-wide impacts reflect the displacement of economic activity. If we considered only the estimated study area impacts, these would be greater as there is a redistribution of economic activity from other parts of London, particularly central London.

## Wider Considerations

The Bexley Riverside Opportunity Area stretches along the south side of the Thames. It includes some of the potential stations on the new route, providing opportunity for significant redevelopment around upgraded stations served by the Elizabeth Line. The current line terminus at Abbey Wood is also strategically located within the Thamesmead and Abbey Wood Opportunity Area. The extension could complement and build on the transport investment and regeneration plans in this area, including the Thamesmead and Beckton Riverside Public Transport Programme.

## Enfield to Liverpool Street Overground

### Challenges Addressed

The Enfield Town branch of the London Overground service into and out of Liverpool Street station is reduced from four trains per hour at peak times to two trains per hour during off-peak. This means the service does not meet the 'turn-up and go,' metro-style service provided by much of the London transport

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<sup>20</sup> An informal group of stakeholders comprising the London Borough of Bexley, Dartford Borough Council, Gravesham Borough Council, Ebbsfleet Development Corporation, Kent County Council and the Greater North Kent Partnership. The Greater London Authority, Network Rail and Transport for London also attend Partnership meetings as required.



network. In the short-term, TfL are looking into the feasibility of operating a three trains per hour service off-peak on both the Enfield Town and Cheshunt branch on weekdays.

### Impacts Unlocked

Impacts would primarily be associated with journey time savings. TfL has undertaken demand modelling to compare the potential journey time savings with the costs of implementing this change. They estimate journey time saving benefits of £4.88m, resulting in a Benefit Cost Ratio (BCR) of 5.7 which would represent 'Very High' value for money based on the DfT Transport Appraisal Guidance. This reflects the buoyancy of demand on this route which now exceeds pre-pandemic levels and will continue to grow due to significant estate and brownfield regeneration activity in LB Enfield and LB Haringey. These journey time savings will benefit people travelling from Enfield, as well as residents of boroughs outside of the sub-region (Haringey and Hackney).

By improving off-peak services, the change would primarily benefit those travelling for leisure or those who commute at off-peak times by encouraging them to travel sustainably. The investment also has the potential to improve the attractiveness of areas within the catchment area of affected stations. In Enfield this is expected to deliver particular benefits around Southbury. In the longer term, peak service frequencies may need to increase to respond to further development in such areas.

### Wider Considerations

As an off-peak change, this is not expected to overcome a specific constraint to development and therefore is not expected to directly unlock housing and employment sites or opportunities, however by improving perceptions of an area and enhancing connectivity more generally, it may increase demand for housing locally and could support a faster rate of housing delivery.

## Lower Thames Crossing

### Challenges Addressed

Currently, Dartford is the only road crossing of the Thames east of London. National Highways data shows that it is the worst performing part of the strategic road network, with three hours of closed lane per day due to incidents and the equivalent of four weeks of closures of a tunnel per year due to operational interventions. Journey times are longer than they should be, with one in seven journeys taking more than double the time that National Highways estimates it should, and almost two in three journeys taking more than five times longer.

### Impacts Unlocked

The Lower Thames Crossing would ease congestion on the Dartford Crossing and improve journeys on the national strategic road network. The project nearly doubles cross river capacity, reducing traffic at the Dartford Crossing by around 20%. This is expected to deliver more reliable journeys and fewer delays, generating significant journey time savings. National Highways analysis suggests that congestion at the Dartford Crossing costs the UK more than £0.5m per day and more than £200m every year due to time stuck in traffic.

It is expected to boost access to employment opportunities and thus productivity, with 30% more jobs within a 30-minute commute of workers in Gravesham, Thurrock and Havering. The construction itself is also expected to create thousands of local jobs during its six years of construction due to aims to recruit at least 45% of the project's workforce from within 20 miles of the route.

The Lower Thames Crossing also has ambitious carbon reduction targets to help the UK reach net zero by 2050. It is the first major infrastructure project in the UK to use its procurement processes to drive down construction carbon and to commit to a legally binding carbon limit in a development Consent Order

(1.44m tonnes), which is a 50% reduction against the baseline. By testing low carbon innovation and approaches, the project is expected to leave a legacy that enables future projects to achieve carbon neutral construction and delivery, delivering future carbon savings.

### **Wider Considerations**

The project delivers the connectivity required to help to unlock the ambitions outlined in the Thames Estuary Growth Commission 2050 Vision, that the region could generate £1.3m new jobs and £190bn growth by 2050.<sup>21</sup>

Within the Local London sub-region, the reduced congestion at the Dartford Crossing is expected to lower journey times and reduce community impact of incidents by preventing traffic spilling back onto local roads as traffic flows more freely onto the major A roads and motorways. While it is not possible to identify links to specific development locations in the Local London sub-region, the reduced congestion and improved air quality in and around the sub-region will support development and may enable sites to come forward more quickly.

Lower Thames Crossing is a key enabler for the ongoing development of the Thames Freeport and would almost double capacity for the vital strategic global trade route connecting Europe to the nation's busiest ports, key manufacturing centres and distribution hubs. As one of the UK's most strategically important roads, the Dartford Crossing carries over 50 million vehicles a year, of which almost 40% are freight vehicles. It is a single point of failure for the UK's internal and external trade flows and current presents a barrier to freight growth.

## **Rail Devolution and Metroisation**

### **Challenges Addressed**

South and South East London's public transport network is not delivering to its full potential. Southern and Southeastern metro services consistently perform poorly compared with the London Overground on measures such as train punctuality and customer satisfaction. Many passengers located on the rail network prefer to travel by bus to access the more reliable Tube services instead. This contributes towards greater congestion on the tube network and greater car dependency in South East London than the London average.

### **Impacts Unlocked**

While there are some impacts from devolution alone, the majority of impacts are realised through the subsequent metroisation of services. Devolution of the London Overground and the Elizabeth Line have led to higher usage, higher levels of passenger satisfaction, and more reliable services. Devolution and metroisation could similarly deliver reduced journey times and improved reliability of services for residents in South East London. More predictable services could also build trust and encourage the use of the rail network, reducing congestion on other parts of the transport network. This includes potential to increase mode shift from cars to public transport, reducing carbon emissions and improving air quality.

The network's underperformance currently limits growth in South East London. Higher capacity and improved connectivity could support the delivery of new homes, as has been demonstrated through previous projects with similar improvements. For example, the Elizabeth Line has contributed to higher housing growth along these sections of the Line compared to London averages. Evidence suggests that large-scale housing development at Southall and Hayes & Harlington (on the Paddington to Reading

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<sup>21</sup> [2050\\_Vision.pdf \(publishing.service.gov.uk\)](#)

branch) would not have happened without the Elizabeth Line. TfL have previously identified potential for the Metroisation proposals to serve housing sites with capacity for around 60,000 homes. These sites were identified in 2017, with analysis based on the development and densification of Strategic Housing Land Availability Assessment (SHLAA) sites and small sites near stations.

Agglomeration benefits could also be generated from connections between the Central Activities Zone (CAZ) to South East London's key employment hubs. Connectivity leads to greater sharing, matching and learning between firms, resulting in further productivity benefits for firms, reduced time spent travelling by employees and increased labour market catchments.

### **Wider Considerations**

In the future, in a new policy context impacting new land use and housing policies, the housing potential could increase significantly, particularly if the scheme is aligned with the London Plan review. The full growth impacts would be expected over a few decades.

Metroisation also has the potential to facilitate better integration outside the sub-region with broader regional and national transport networks, enhancing the economic linkages and collaboration between South and South East London and other regions.

## **River Roding Crossings**

### **Challenges Addressed**

The River Roding severs access between the Royal Docks and Barking Riverside resulting in poor east-west transport connectivity. As with other parts of the Thames Riverside, the area to the east of the River Roding is rated as having some of the worst public transport accessibility in London (with PTALs rated as 1 across much of the area).

To the south, while public transport connectivity is provided to the east of the Lower River Roding by Barking Riverside Overground station and bus services, areas adjacent to the River Roding are a 30 minute walk from the station.

Further north, the river continues to act as a barrier to east-west movement, resulting in limited crossing points between Newham and Barking & Dagenham.

### **Impacts Unlocked**

Thames Road is a development location to the east of the River Roding identified in the Barking & Dagenham Local Plan as having the potential to support 2,000 new homes and 38,500 sqm of commercial floorspace. While the proposals have planning permission, challenges concerning viability are delaying delivery. These proposals are closely linked to the Lower River Roding Crossing which will provide walking, cycling and bus connections to the proposed DLR service at Beckton Riverside (part of the proposed extension to Thamesmead). Delivery of the crossing, alongside the DLR extension will improve transport connectivity, improve land values and address the viability constraints limiting development in areas including Thames Road.

This investment would also deliver benefits to existing communities which are poorly connected, especially for residents without access to a car. This includes Marks Gate and Thames View, both of which suffer from deprivation and high unemployment. While not directly dependent on the new crossing, by improving east west connectivity, and opening up access to the DLR, it would also benefit Barking Riverside, a development of 21,000 new homes.

Further north, proposals for a walking and cycling link over the River Roding to the north of the Elizabeth Line have recently received funding as part of the Mayor's Civic Partnership Programme and will support aspirations for Ilford Garden Junction, a liveable neighbourhood scheme in Redbridge.

### **Wider Considerations**

The proposed crossing would form part of a programme of investment that provide improved connectivity and transport infrastructure to the Thames Riverside area, providing links between Barking Riverside and Royal Docks to complement investment further west.

## **Stratford International**

### **Challenges Being Addressed**

When it was originally built, Stratford International station was intended as the London stop for regional Eurostar trains bypassing St Pancras and continuing to other destinations in Britain. However, despite its strategic location on the High-Speed 1 (HS1) route, the station is not currently used for international rail services. If modifications were made to configure the station, there is untapped potential for this station for both international passengers, as well as high value light freight.

Preliminary analysis undertaken by Steer on behalf of the London Legacy Development Corporation (LLDC) in 2022 suggested the capital funding required to adapt the station to international services could be between £14m and £17m. The engagement through this assessment also identified potential market interest to operate these services, suggesting potential commercial demand.

### **Impacts Unlocked**

The preliminary assessment highlights the range of expected benefits of the new international service as an alternative London terminus to St Pancras. A range of scenarios have been modelled to demonstrate the potential scale of the monetised impacts under different assumptions for passenger demand.

Some existing international rail users within the sub-region and beyond are expected to switch journeys from St Pancras due to more convenient access to Stratford International, resulting in journey time savings. For the medium passenger demand growth scenarios, journey time savings could be between £16m and £37m over 10 years (2010 prices). The project could also generate additional rail passenger demand - both as demand captured from air and as new induced demand. Carbon savings would arise from the expected modal shift towards a lower carbon alternative. The central scenario suggests environmental benefits to the UK of between £35m and £69m over a 10 year period (2010 prices).

The project is also expected to generate employment benefits through staff hired to operate the new service and potential jobs at the nearby Temple Mills train maintenance depot. Including indirect benefits due to induced spend, gross employment-related benefits could generate between £27m and £50m annually (2021 prices). The net additional leisure and tourism trips generated by the new service would generate footfall and spend in the local and national economy. Tourism spend could generate £10m to £35m per annum (2021 prices).

These monetised impacts are based on the assumptions that new international services would terminate at Stratford rather than St Pancras to maximise the local impacts to Stratford; and that the new operator's offer would be distinct from the Eurostar to capture or stimulate a different market segment, for example through a lower cost, lower frequency offer.

## Wider Considerations

While the project is not linked with specific housing or employment sites, the project would align well with wider regeneration ambitions in Stratford, including the regeneration of Stratford Station and ongoing development plans in the Olympic Legacy Opportunity Area. Partnerships and marketing campaigns could be established with the new operators to increase the attractiveness of the offer in local hotels and restaurants, to retain a greater proportion of benefits in the local area.

## Stratford Station

### Challenges Being Addressed

Stratford Station is the primary means of access for residents, businesses, and visitors to Queen Elizabeth Olympic Park and performs a critical interchange role, with 170 trains per hour directly serving over 200 destinations. One of the consequences of the success of recent regeneration and investment in East London is a significant increase in station footfall. Passenger movements have trebled in the last decade to approximately 128 million passengers a year.

The station faces significant capacity challenges meaning station staff regularly have to administer operational measures, including one-way systems. Passenger demand grew by 280% at Stratford between 2005 and 2019. 128 million passenger journeys were recorded in 2019, which TfL forecasts will increase by 60% by 2041. This would result in the station being unable to accommodate passenger demand by the mid-2030s. The current station layout causes further challenges; entrances and exits do not provide a fast and legible route to the Queen Elizabeth Olympic Park and the railway creates major severance barriers, limiting journeys between the Olympic Park and other parts of Stratford and East London.

Short and medium term interventions are being implemented and investigated to facilitate the operation of the station until the 2030s. Further investment and redevelopment will be required to accommodate longer term passenger demand.

### Impacts Unlocked

Reducing congestion is expected to reduce journey times, congestion and improve passenger experience, generating journey time savings of £638m (2021 prices). With a development mix and viability to be determined, new development on public sector land adjacent to the station could directly deliver up to 2,000 new low carbon homes and up to 150,000sq.m of commercial floorspace, supporting up to 10,000 jobs.

Improving the station configuration and addressing the major severance barrier would better connect Stratford town centre, boosting land values and development potential in and around the station. It would also increase active travel options and open access to nearby open and civic spaces.

## Wider Considerations

The London Plan has identified Stratford as a major location for growth and the area has significant committed development. However, a poorly performing and unreliable station has the potential to deter investment and constrain the delivery of new homes and jobs within the town centre. The homes and

jobs directly unlocked will contribute to the Olympic Legacy Opportunity Area's target of 39,000 new homes and 65,000 jobs.<sup>22</sup>

## Superloop

### Challenges Addressed

Orbital connections in Outer London are often difficult and unattractive by public transport. To deliver on the Mayor's Transport Strategy ambitions, the Mayor developed plans for a Superloop network of express bus routes to connect outer London town centres, railway stations, hospitals and transport hubs, alongside £6m funding to act as an initial catalyst. This consisted of upgrades to four existing express routes through doubling bus frequencies and boosting off-peak frequencies, as well as introducing five new express routes.

### Impacts Unlocked

Superloop has added more than six million scheduled bus kilometres per annum to the capital's network. The latest data provided in the 2023/24 progress report for the Mayor's Transport Strategy shows increasing demand for Superloop services, with average growth on all Superloop routes since June 2023 being 9% higher than the network average.<sup>23</sup> Almost half of all Superloop journeys involve an interchange with another mode of public transport, demonstrating the important role of the network in outer London's public transport connectivity and how the investment has complemented other transport modes.

The key impact for the sub-region is journey time savings between key outer London destinations in Waltham Forest, Redbridge, Newham, Bexley, Bromley and Greenwich associated with express services with limited stops and reduced wait times between services. Superloop has also increased journey choice for residents and visitors to these boroughs. There is also potential to deliver carbon savings through providing an alternative to private car travel.

Additional Superloop services proposed by the Mayor of London could help to provide greater connectivity to areas under served by public transport, providing greater connectivity and providing stimulus for growth in areas such as Chingford.

### Wider Considerations

Though the project is not expected to directly enable specific sites for development, improving bus connectivity helps to meet the needs of a growing population through increased demand for travel for work and leisure. This may improve demand for development – specifically for sites that now have improved connections to major transport hubs. There is potential for boroughs to build on this opportunity by reducing road congestion to further improve bus journey times possible through the express routes and for TfL to consider expansion of routes to improve connectivity and interchange opportunities.

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<sup>22</sup> Located within LB Hackney, LB Newham, LB Tower Hamlets, LB Waltham Forest

<sup>23</sup> [TfL Delivering the Mayor's Transport Strategy 2023/24](#)

## Thames Ferry Crossings

### Challenges Addressed

A key challenge in the sub-region concerns the severance challenges associated with the River Thames. The limited number of crossings east of Tower Bridge results in high levels of congestion and traffic pollution, particularly around and approaching the existing crossings. These challenges are particularly notable between key Opportunity Areas such as Royal Docks and Charlton Riverside.

The proposed ferries would create additional crossings for pedestrians and cyclists and would provide an alternative to overcrowded routes, such as the Jubilee Line, reducing pressure on the public transport network. They are quicker to implement than new bridges across the Thames and require significantly lower upfront costs. Three potential routes are under consideration: (i) Isle of Dogs – North Greenwich, (ii) Royal Docks – Charlton, and (iii) Barking Riverside – Thamesmead.

### Impacts Unlocked

The main direct benefits of the investment proposals are:

- **Journey Time Reductions:** The ferry services would shorten travel times across the Thames, particularly in areas lacking direct crossings.
- **Congestion Relief:** By offering an alternative to existing road and rail routes, the ferries would help alleviate congestion.
- **Increased Active Travel:** Designed with pedestrians and cyclists in mind, the ferry services would encourage greater use of active travel, linking to the Thames Path and other key routes.
- **Carbon Emissions:** Zero-emission ferries contribute to London's sustainability goals, promoting greener travel options.

While there is some uncertainty over the level of value for money of each option (due to uncertainties over the scale of benefits and associated costs and funding), all routes have the potential to deliver value for money based on these impacts.

Once routes are confirmed, there may also be direct links to specific development locations through enhanced public transport accessibility, however it is not possible to confirm these at this stage.

### Wider Considerations

The ferry crossings have the potential to form part of the package of investments that support growth in East London by providing new public transport routes to both job markets and residential developments. The proposed ferry crossings would integrate with London's broader transport network, complementing existing public transport and active travel routes. By alleviating congestion on parallel lines and buses, the ferries would enhance the overall capacity and efficiency of London's transport system.

## Thames Piers and Wharves Development

### Challenges Addressed

There is potential to alleviate some of the pressure and congestion on the existing London road network by shifting freight and passenger services to the Thames. These pressures are expected to increase, with forecasts predicting that there will be more than two million additional people living in London by 2041,



with six million extra journeys made daily.<sup>24</sup> As of 2018, 91% of UK domestic transport emissions were associated with road transport, of which 17% was attributable to Heavy Goods Vehicles (HGVs)<sup>25</sup>. While London saw a reduction in the share of HGVs on the road between 2012 and 2019, Light Goods Vehicles (LGVs) have become more common, rising from 13.0% of all vehicle miles to 16.4%. TfL estimate that this equates to over 7,300 vans per hour during the morning peak. Growth in LGV movements is expected to increase by 43% by 2041, in line with population growth for London.

### Impacts Unlocked

Shifting freight and passenger services to the river could have significant environmental benefits through a reduction in greenhouse gas emissions and improvements to air quality. River freight could save approximately 2,300 tonnes of CO<sub>2</sub> and 4 tonnes of NO<sub>x</sub> per annum.

Removing heavy good vehicles in London could also reduce accident risks for other road users, reduce noise pollution, deliver journey time savings for other road users, and reduce road wear and tear and subsequent maintenance costs.

While the Thames Piers and Wharves development is not expected to directly unlock housing or employment sites, increased demand for light river freight infrastructure could provide new opportunities to reimagine the mixed-use regeneration of key riverside locations. For example, safeguarded wharves could provide additional riverside logistics space and freight infrastructure, alongside the delivery of new homes.

Thames Estuary Growth Board and Port of London Authority (PLA) research suggests that a river freight service could generate £0.37 in social benefit per parcel.<sup>26</sup> The modal shift from road freight to river is also expected to generate employment and GVA benefits, due to more workers required to deliver the 'last mile leg' of a parcel's journey by cargo bike, as well as the jobs required to run the river freight services themselves. Combined with the modal shift benefit, river freight is estimated to generate between 60 and 800 net additional jobs, generating between £4.5m and £60m in net additional GVA per annum, depending on the scale and volume of flows.

### Wider Considerations

Further utilising the river for passenger and freight services has potential to improve the overall capacity in London's transport system. While these capacity improvements are not specific to particular areas, they will contribute towards improving the quality of life for existing and future residents through environmental benefits, greater journey choice and improved network resilience.

Many of the Opportunity Areas are on the riverside, including Thamesmead, Greenwich Peninsula and the Royal Docks, meaning that the provision of light freight and passenger services would complement wider strategies and ambitions, contributing towards the Mayor's Transport Strategy and the River Action Plan.

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<sup>24</sup> [Freight and servicing action plan \(tfl.gov.uk\)](https://www.tfl.gov.uk/roadworks/projects/roadworks-research/freight-and-servicing-action-plan)

<sup>25</sup> [PowerPoint Presentation \(thamesestuary.org.uk\)](https://www.thamesestuary.org.uk/powerpoint-presentation)

<sup>26</sup> [Light Freight on the River Thames Feasibility Study, WSP](#)

## Thamesmead and Beckton Riverside Public Transport Programme

### Challenges Being Addressed

Thamesmead Waterfront and Beckton Riverside are two of the largest remaining brownfield sites in London and among the few remaining undeveloped waterfront sites within London and the Thames Estuary. Both sites are the locations of low density, out of town retail parks which are heavily dependent on car usage. They are also in locations which suffer from significant inequality and deprivation. However, the development potential of these areas and the regeneration of the wider community in Thamesmead is constrained by the lack of direct access to rail services.

In addition to poor access into Central London and other major employment centres, a particular challenge in these parts of London is north-south connectivity – with limited access between East London and South East London.

### Impacts Unlocked

Investment in a DLR extension connecting Beckton Riverside and Thamesmead to the existing service at Gallions Reach, alongside a bus transit option at Thamesmead with improvements to bus priority, will provide a significant improvement to public transport at Thamesmead Waterfront and Beckton Riverside and unlock 145 hectares of brownfield land for development. The Strategic Outline Case and public consultation for the investment indicates that these sites have the potential to create new mixed communities that could accommodate up to 30,000 new homes and up to 10,000 new jobs over the next 30 years.

In July 2023, since the strategic outline case was submitted, the former Secretary of State for Levelling Up, Housing and Communities has announced support for a 'Docklands 2.0' vision for up to 65,000 homes across Beckton Riverside, Thamesmead and Silvertown.

The proposal would reduce journey times and provide a public transport cross-river connection directly into the centre of Thamesmead – an area with no existing rail services. Rail access and river crossing will provide better access to London's rail network providing better access to jobs and London's employment centres. Passive provision for a future further extension to Belvedere would also unlock development potential in that area and provide interchange with national rail services and, while beyond the scope of the current business case, the proposals could support a Bus Rapid Transit link from North Greenwich to Slade Green.

### Wider Considerations

While the direct impacts of the project will be concentrated in Thamesmead and Beckton, the improved transport links are expected to stimulate housing and job creation over the medium to long term across the wider sub-region, particularly if further extension to Belvedere can be secured. The investment will relieve pressure on parallel transport routes, alleviating congestion on the roads and other public transport services and is expected to significantly reduce carbon emissions by decreasing the number of daily car trips, contributing to London's environmental sustainability goals.

Improved bus services in Thamesmead will provide links to the existing mainline, Elizabeth Line at Abbey Wood and Woolwich. There are also links to the another of Local London's strategic priority projects – the Elizabeth Line extension to Ebbsfleet. Were this to be delivered in the future, the combined investments would provide residents in the wider area improved choice and transport resilience.

## Walthamstow Central

### Challenges Addressed

Walthamstow is a major London town centre and the civic, commercial and cultural heart for 300,000 residents of Waltham Forest. Walthamstow is one of the most accessible locations in the city, with over 20 million passenger journeys per annum from the northern terminus of the Victoria Line, two London Overground lines and London's third busiest bus station.

Walthamstow is undergoing sustained regeneration delivered through public-private sector partnerships, enabled by Waltham Forest Council. In the last five years, over 1,000 mixed-tenure homes have been delivered, alongside a 950-seat theatre, commercial uses, community infrastructure and the opening of University of Portsmouth's London Campus. To sustain this growth, investment is required to address capacity and accessibility challenges at Walthamstow's transport interchange. In the medium term, reducing congestion in the current station envelope would avoid having to manage demand by holding passengers outside the station in the morning peak and running both escalators up in the afternoon peak, requiring all entering passengers to use the long, fixed stair to platform level.

### Impacts Unlocked

There are direct transport related benefits in the form of journey time savings, namely from congestion avoided in the morning and afternoon peaks, shorter journeys for those heading to and from the north of the station and better travel options from passengers who benefit from step-free access.

Though there are significant uncertainties around both costs and benefits, TfL have estimated BCRs based on the anticipated transport impacts. Under current capital cost assumptions, the new proposed second entrance at Walthamstow Central Station would have a BCR of between 1.5:1 and 3:1 depending on assumptions, with a central BCR of approximately 1.8:1. The business case envisages at least £150m NPV of social benefits over a 60 year appraisal period. This calculation is subject to change depending on any future timeline for delivery and any subsequent impact on capital costs or realisation of passenger benefits.

The TfL appraisal does not consider wider benefits or disbenefits such as housing and employment impacts. However, the project is expected to unlock housing-led, mixed-use delivery of sites in the immediate vicinity of the transport interchange – including Council-owned freehold land at 17&Central shopping centre, Sainsbury's and Walthamstow bus station (over which TfL has the long-leasehold). This investment will unlock c.£750m+ GDV phased mixed use regeneration in the vicinity of the transport interchange and across the town centre.

As well the direct impacts of unlocked public and privately-owned sites in Walthamstow town centre, there are tangible links to delivery of new development in the interchange's wider catchment area. The Council has worked with TfL and GLA to provide an initial assessment of the wider regeneration and growth benefits of the investment. The Council's adopted Local Plan (part 1) sets out high-level figures for housing and mixed-use growth, including resultant employment, across the borough's 'Strategic Locations' including c.1,500 mixed-tenure homes and 5,000 sqm+ commercial uses on Council freehold land in the vicinity of the transport interchange.<sup>27</sup>

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<sup>27</sup> [https://www.walthamforest.gov.uk/sites/default/files/2024-02/LBWF\\_LocalPlan\\_LP1\\_Feb2024\\_compressed.pdf](https://www.walthamforest.gov.uk/sites/default/files/2024-02/LBWF_LocalPlan_LP1_Feb2024_compressed.pdf)

Investment in the station's capacity and accessibility will contribute to enabling and unlocking sites within Strategic Locations over the plan period, including Walthamstow Town Centre, Forest Road Corridor, Wood Street, Bakers Arms, Whipps Cross, Highams Park, Chingford Mount, North Chingford.

This provides wider strategic benefits, including delivery of the new sub-regionally important hospital at Whipps Cross, wider investment in publicly-owned land as overseen by the One Public Estate partnership, culture-led economic growth plans for Walthamstow, the borough's (and one of London's) major town centres, and delivery of growth within and aligned to the Upper Lea Valley Opportunity Area.

There are broader transport impacts expected. If there is not sufficient public transport capacity to meet demand there could be knock-on impacts to bus, highway or pedestrian movements if queuing occurs outside the station; impacts on London Overground if there are delays to trains due to platform congestion; or carbon impacts if the worsening of public transport leads to more car trips. Investment would avoid these disbenefits in the medium term.

### **Wider Considerations**

As a major interchange, the project has potential to deliver impacts over a large area due to the station's significant passenger catchment. This recognises that the underground station is a key part of the wider transport interchange, specifically the northern terminus to the Victoria Line, London's third busiest bus station and London Overground services on the Chingford-Liverpool Street and Gospel-Oak Barking Lines (via nearby Walthamstow Queen's Road).

For example, TfL and Office of Rail and Road passenger journey data indicates that, on average, 40-45% of customers using Chingford and Highams Park overground stations interchange at Walthamstow Central station. Walthamstow bus station's comprehensive sub-regional network serves residents across the borough as well as neighbouring boroughs such as Redbridge. This includes locations to the north of Walthamstow where there is lower public transport accessibility and therefore greater reliance on access to the interchange. Therefore, as well as specific sites unlocked, the station has potential to act as a significant barrier to housing growth in the medium to long term across the entire passenger catchment if capacity is not improved.

## 5 Growth Opportunities

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Transport infrastructure and investment will play a key role in contributing towards, and driving borough, sub-regional and London-wide growth ambitions.

In this section we consider the sub-regional and borough level priorities for growth – both existing priorities that are being progressed at a borough level and longer term opportunities under consideration. We set out how they relate to the 15 priority transport projects and consider what additional investment may be required to support and enable housing and employment across the sub-region.

The assessment is based on a review of Local Plans, relevant economic and growth strategies, plus consultation with borough officers and key stakeholders.

### Sub-Regional and Regional Opportunities

The sub-region has significant growth potential. The London Plan and the Mayor's Transport Strategy identifies a number of Opportunity Areas (OAs), which are key locations with potential for new homes, jobs and infrastructure of all types that are expected to drive growth in coming years. There are ten adopted OAs within the sub-region, including Charlton Riverside, Greenwich Peninsula, Olympic Legacy, Ilford, Lee Valley, London Riverside, Royal Docks and Beckton Riverside, Thamesmead and Abbey Wood, Woolwich and Deptford Creek/Greenwich Riverside. Collectively, these areas are projected to deliver around 183,500 new homes and 174,500 jobs.

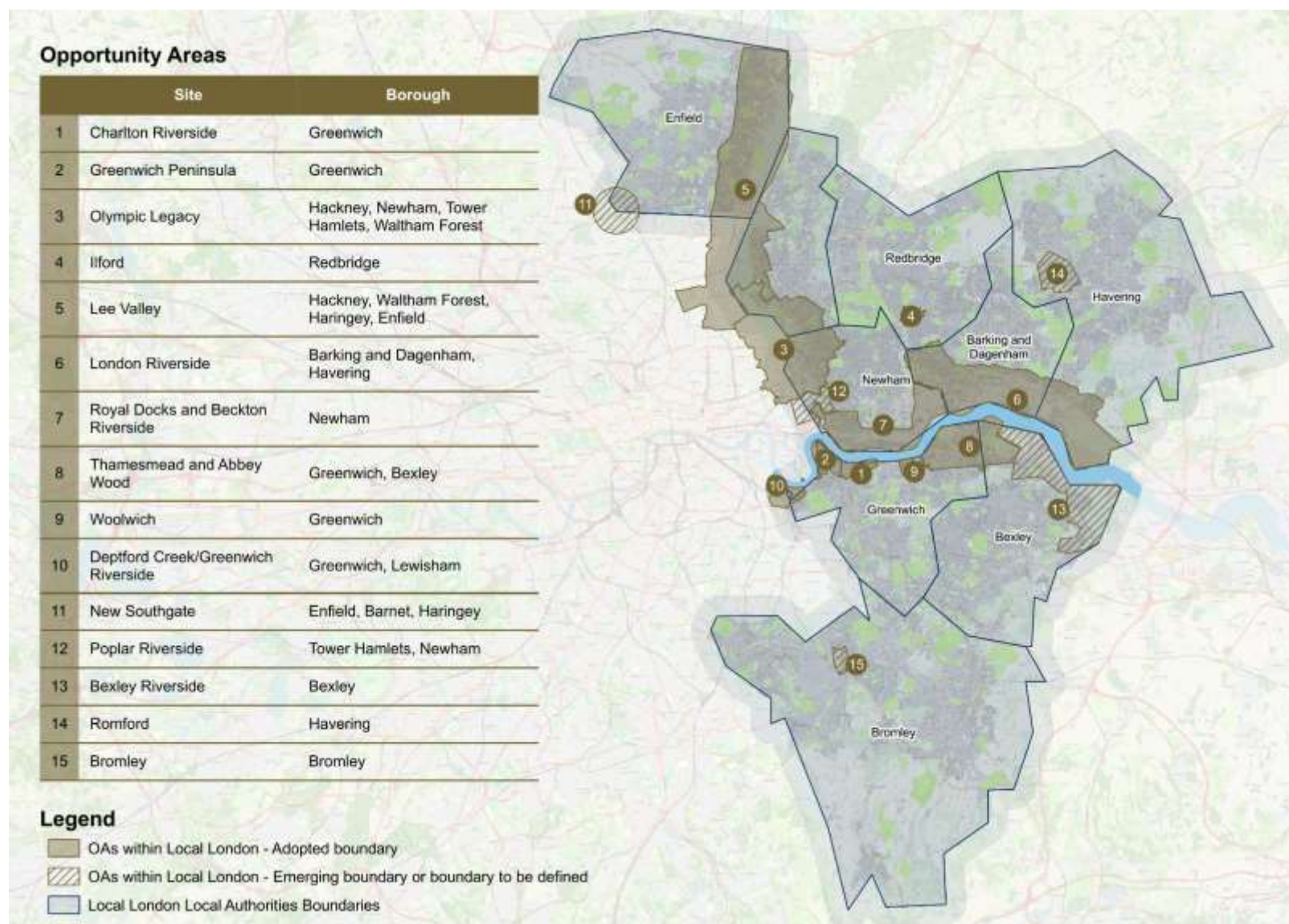
There are a further five emerging Opportunity Areas within the sub-region, some of which have a published boundary and are on track to be adopted, and some where a boundary is yet to be defined.

Many of the 15 priority transport projects are located within Opportunity Areas and will play a key role in supporting these regeneration ambitions. In some areas, such as the London Riverside Opportunity Area, projects are expected to complement each other to collectively drive growth. This includes the **A13 and South Barking Improvements, Beam Park Station, Lower River Roding Crossing**, as well as potential **Thames Ferry Crossing** locations. This concentration of projects is reflected in the significant ambition for the Opportunity Area of 44,000 new homes and 29,000 new jobs by 2041.

Meanwhile, some projects are expected to have impacts across multiple Opportunity Area boundaries and therefore play a valuable role in linking up these strategic opportunities to generate greater impact. The **Thamesmead & Beckton Riverside PTP** will link **Royal Docks & Beckton Riverside** with **Thamesmead & Abbey Wood**, as well as the **Woolwich Opportunity Area**. It would also provide greater access to the current Elizabeth Line terminus at Abbey Wood which, if extended to Ebbsfleet, would generate further transport options and links with Opportunity Areas further east at **Bexley Riverside**. **Ferry Crossings** into the **London Riverside** Opportunity Area provide further cross-river links. Similarly the **Lower Roding Crossing** will connect both London Riverside and Becton Riverside Opportunity Areas.



Figure 5.1 Opportunity Areas within Local London Boundaries



## Local Growth Opportunities

The priority transport projects would also play a key role in contributing towards and driving boroughs' own growth ambitions, particularly relating to housing and employment growth. Each borough's Local Plan outlines the local opportunities for delivering housing growth and, in some instances, employment growth over its plan period. Meanwhile, the London Plan outlines the housing targets that each Borough should aspire to in their latest or upcoming Plans.

**Table 5.1 Local Plan and London Plan Housing and Employment Targets by Borough**

Borough	Local Plan			London Plan Annual Target (2019/20 - 2028/29)
	Title and adoption date	Housing and Employment Targets	Annual Housing target	
<b>Barking &amp; Dagenham<sup>28</sup></b>	LB of Barking & Dagenham Local Plan 2020-2037 (2024)	Housing Target: 38,864 Employment Target: 9,160 to 20,000	2,286	1,944
<b>Bexley<sup>29</sup></b>	LB of Bexley Local Plan 2038 (2023)	Housing Target: <i>Meet the Mayor's 10-year (2019-2029) housing target for Bexley of 6,850 (net) new homes, and provide for at least 6,165 (net) new homes for the period (2030-2038)</i> The Council will support the economic growth of at least 10,800 (net) new jobs over the plan period.	685	685
<b>Bromley<sup>30</sup></b>	LB of Bromley Local Plan 2019-2031 (2019)	Housing Target: 6,410 ( <i>in accordance with the London Plan 2016 (2015/16 - 2024/25)</i> ) Employment Target: <i>Not explicitly mentioned</i>	641	774
<b>Enfield<sup>31</sup></b>	LB of Enfield Local Plan 2010-2025	Housing Target: 10,980 Employment Target: 6,000	732	1,246
<b>Greenwich<sup>32</sup></b>	LB of Greenwich Local Plan 2013-2028 (2014)	Housing Target: 38,925 Employment Target: 21,000	2,595	2,824

<sup>28</sup> London Borough of Barking & Dagenham, September 2024: [B&D\\_LocalPlan\\_A4\\_SEP24\\_digital.pdf \(lbld.gov.uk\)](#)

<sup>29</sup> London Borough of Bexley Local Plan, April 2023: [Bexley 2038 Local Plan](#)

<sup>30</sup> London Borough of Bromley Local Plan, January 2019: [Local Plan \(bromley.gov.uk\)](#)

<sup>31</sup> London Borough of Enfield Local Plan, November 2010: [Core Strategy Adoption November 2010 \(enfield.gov.uk\)](#)

<sup>32</sup> London Borough of Greenwich Local Plan, July 2014: [Royal Greenwich Local Plan Core Strategy with Detailed Policies main \(4\).pdf](#)



	Local Plan			
<b>Havering</b> <sup>33</sup>	LB of Havering Local Plan 2016-2031 (2021)	Housing Target: 18,930 Employment Target: <i>Not explicitly mentioned</i>	1,262	1,285
<b>Newham</b> <sup>34</sup>	LB of Newham Local Plan 2018-2033 (2018)	Housing Target: 43,000 Employment Target: 39,000-60,000	2,867	3,280 (plus 1,480 for the LLDC area) <sup>35</sup>
<b>Redbridge</b> <sup>36</sup>	LB of Redbridge Local Plan 2015-2030 (2018)	Housing Target: 17,250 Employment Target: 5,000	1,150	1,409
<b>Waltham Forest</b> <sup>37</sup>	LB of Waltham Forest Local Plan 2020-2035 (2024)	Housing Target: 27,000 Employment Target: 8,200 <i>at primary locations for growth</i>	1,800	1,264

While the priority transport projects are expected to contribute towards these growth ambitions, boroughs will have a range of other local transport priorities and where relevant these are set out below.

## Barking & Dagenham

The Barking & Dagenham Local Plan sets out the Borough's ambition to deliver over 40,000 homes and 20,000 jobs by 2037. This ambition exceeds their housing needs-based requirement of 38,000 homes covering the same period. The council recognises that the scale of new housing and development will require a new emphasis, promoting a shift to sustainable modes of transport with less dependency on car use.

The Council are also in the process of developing its Inclusive Growth Strategy covering 2022-26. This will provide the basis for the borough achieve 20,000 new jobs over the plan period and the current draft Themes are to: (i) Create a thriving and inclusive economy, (ii) Create places to be proud of, (iii) homes for everyone, (iv) A net zero, cleaner, greener borough.

The immediate priority areas for growth in the borough are located in the south of the borough. The Council is working with its partners to unlock 'the huge economic and social opportunities which exist through development and investment in new infrastructure in the **London Riverside** area'<sup>38</sup>. Development at **Barking Riverside**, a new town centre with over 10,000 new homes, and **Thames Freeport** are under way. Additional growth will be focused on Thames Road (in the south east of the borough), **Castle Green**, to the north of **Barking Riverside**, and around a new **Beam Park** station to the north of the Free Port area.

Development of these brownfield sites is however dependent on significant improvement in the local and strategic transport network. The existing **A13** is constraining growth as a result of existing congestion and capacity issues, but also as a result of the barrier and severance issues created by this major arterial

<sup>33</sup> London Borough of Havering Local Plan, November 2021: [Local Plan 2016-2031 Adopted 2021 \(havering.gov.uk\)](https://www.havering.gov.uk/local-plan-2016-2031-adopted-2021)

<sup>34</sup> London Borough of Newham Local Plan, 2018: [newham-local-plan-2018-pdf](https://www.newham.gov.uk/media/10000/2018-01-18-newham-local-plan-2018-pdf)

<sup>35</sup> The London Legacy Development Corporation powers are due to be handed back to host boroughs by the end of 2024

<sup>36</sup> London Borough of Redbridge Local Plan, March 2018: [Redbridge Local Plan 2015-2030](https://www.redbridge.gov.uk/media/10000/redbridge-local-plan-2015-2030)

<sup>37</sup> London Borough of Waltham Forest Local Plan, February 2024: [Local Plan \(LP1\) - Adoption Version \(walthamforest.gov.uk\)](https://www.walthamforest.gov.uk/media/10000/waltham-forest-local-plan-2020-2035-adoption-version)

<sup>38</sup> London Borough of Barking & Dagenham, September 2024: [B&D LocalPlan\\_A4\\_SEP24\\_digital.pdf \(lbdd.gov.uk\)](https://www.barking-dagenham.gov.uk/media/10000/b&d-local-plan-a4-sep24-digital-pdf)

route passing through the borough. Improvements to **Barking Station**, new stations at **Castle Green** and **Beam Park**, and the proposed **Lower River Roding Crossing** providing connections to Beckton Riverside will also be required to deliver the scale of growth proposed. Recognising the scale of the area, it will be necessary to complement these strategic transport investments with more local improvements, such as **improved bus connections** to South Barking.

In addition to directly targeting transport capacity constraints and accessibility challenges, these investments will also help to address local 'infrastructure deprivation' that exists as a consequence of these sites being industrial locations. Limited strategic transport infrastructure alongside a deficit of other social and community infrastructure creates significant challenges in relation to the viability of sites for development. By providing strategic transport connections, one of the major locally recognised barriers to development – from a planning, attractiveness and viability perspective – will be addressed.

Elsewhere, supported by the arrival of **Crossrail**, the comprehensive redevelopment of the **Chadwell Heath** industrial estate, in the north of the Borough will deliver homes for thousands of its residents. The development of the **Eastbrook Studios** at Dagenham East is envisaged as part of a wider digital, science and tech cluster in the borough.

Medium and long-term opportunities also exist to the north of the Borough, but these will require further investment to unlock transport capacity – including improvements to the **A12**.

## Bexley

The Bexley Local Plan (2023) sets out policies covering the period up to 2038. The Plan seeks to meet the London Plan target of 6,850 net new homes between 2019 and 2029 and provide 6,165 (net) new homes over the remainder of the plan period to 2038.

The Local Plan also aims to support 10,800 (net) new jobs over the plan period. Between 1,900 to 2,700 of these are expected to be created within Bexley's designated industrial locations.

**Bexley Riverside** is a key Opportunity Area within the LB Bexley. It stretches along the south side of the Thames and includes the areas of Belvedere, Erith, Slade Green and Crayford. It has the potential to deliver 6,000 homes and 19,000 jobs. A key project which is required to help bring forward the site is the extension of the **Elizabeth Line to Ebbsfleet**. The scheme is a key priority within the Bexley Growth Strategy (2017)<sup>39</sup>. To support growth in the immediate term, the Council will explore **enhanced bus services and priority transport measures** to improve accessibility in this part of London.

**Thamesmead and Abbey Wood Opportunity Area** also falls within LB Bexley together with RB Greenwich. In total, the Opportunity Area has the potential to deliver 8,000 homes and 4,000 jobs. The DLR extension to Thamesmead is a priority as part of the **Thamesmead & Beckton Riverside Public Transport Programme**. Whilst the DLR station will be located in RB Greenwich, it is recognised that this is important in bringing forward development at Thamesmead. As the route currently stops at Bexley's border, to realise further benefits for Bexley the route would need to be **extended towards Belvedere**, where it could link in to rail connections.

The **Bexley Riverside Opportunity Area** is currently limited by poor transport connectivity and poor transport choice. In this area and more widely, the borough is currently reliant on heavy rail and buses

<sup>39</sup> [Bexley Growth Strategy](#)

and is one of only two London Boroughs which relies on only two forms of public transport. Therefore, of the 15 strategic transport investments, the key project of significance to supporting growth is the extension of the **Elizabeth Line to Ebbsfleet**. While the extension of the Elizabeth Line to Abbey Wood has already benefited the Thamesmead and Abbey Wood Opportunity Area, further extension would offer significant opportunities for redevelopment around existing stations and to realise Bexley's growth ambitions in key growth areas, including those within Bexley Riverside.

The council is supportive of **Rail Devolution and Metroisation** to generate improvements to the quality of stations, as long as proposals do not result in changes to their current access to key London Terminals. The council is benefiting from the **Superloop** which provides North South routes in the borough and provides further connectivity with rail links, though there are limits to the ability to realise journey time improvements due to lack of highway space and road junction challenges. The borough would like to see further **bus investment** to improve journey choice on **radial routes** that better link up identified growth areas, including the extension of the proposed bus transit between Woolwich and Abbey Wood eastwards into Bexley. **Thames crossings** would also help to address severance across the river and link up Opportunity Areas, such as road-based river crossings connecting **Thamesmead with Gallions Reach** and **Belvedere with Rainham**.

Transport priorities outside of the 15 priority projects include investment in pinch points on the road network where they present constraints to regeneration and economic development and will improve road safety and **investment in cycle routes** to encourage local transport connections, particularly between growth areas and to maximise benefits from existing transport infrastructure. The borough has previously bid for funding through the GLAs Mini Holland programme as part of the Mayor's Healthy Streets approach. However, the bid was unsuccessful.

## Bromley

Bromley's Local Plan was adopted in 2019 and the borough is currently undertaking a review, with an Issues and Options (Reg 18) report published in April 2023. Of the main changes made since 2019, the adoption of the London Plan has increased the Borough's housing target by 20% - from 641 units per annum to 774.

The London Plan has retained the **Bromley Town Centre Opportunity Area**, which is identified as having capacity for 2,500 new homes and 2,000 new jobs. Smaller housing allocations are also set out, including in **Orpington** – the Borough's second largest centre.

Regarding employment – outside Bromley town centre, the main sources of employment are in the **Cray Business Corridor** (designated as SIL), local industrial areas such as **Lower Sydenham**, as well as **Biggin Hill Airport**, which is a strategic aviation and high-tech industry hub. Both Biggin Hill and **Crystal Palace** were also identified as Strategic Outer London Development Centres (SOLDC).

In relation to the strategic transport investments, Bromley is currently benefiting from investment in the **Superloop** – with both the Croydon to Bromley and Bromley to Thamesmead sections currently in operation. It also has the potential to benefit from **Rail Devolution and Metroisation** – with two lines crossing the Borough – and Phase 2 of the **Bakerloo Line Extension** which could link existing rail routes to Beckenham Junction and Hayes to Central London via Lewisham.

Longer term – the Local Plan Infrastructure Deliver Plan sets out range of transport investment, of which the larger strategic investments comprise capacity improvements to existing rail and tram routes, an extension of the **Tramlink** from Beckenham Junction to Bromley town centre and a separate extension to

Crystal Palace, **DLR extension** from Lewisham to Bromley North station. Potential routes for the Docklands Light Railway from Catford to Bromley South via Bromley North and Tramlink from Beckenham Junction to Crystal Palace are safeguarded in the current Local Plan.

## Enfield

The Council is consulting on a new Local Plan for 2019-2041, which provides an indication of Enfield's future priorities.<sup>40</sup> The current draft outlines ambitions for the provision of 34,710 new homes by 2041, equivalent to approximately 1,577 per annum. This is a significant increase on the previous plan's ambitions and brings Enfield in line with the London Plan target of 1,246 homes a year. The emerging Plan's spatial strategy has a particular focus on bringing forward brownfield land for development.

Enfield is home to two Opportunity Areas; the **Lee Valley** in the east of the borough and **New Southgate**, which it shares with Barnet and Haringey to the south west. In total, the borough has identified 11 placemaking areas, of which the majority of development is expected at four: **Meridian Water**, **Southbury**, **Chase Park** and **Crews Hill**. The expansion of Meridian Water, which is within the Lee Valley Opportunity Area, has a long term ambition to deliver 10,000 homes and 6,000 permanent jobs.

The proposed increases to train frequency through the **Enfield to Liverpool Street Overground** project would complement placemaking plans, particularly at Southbury by making it a more attractive place to live and work. There are ambitions for 4,228 homes over the plan period in the area, which includes significant opportunities to densify around the station. To build on this opportunity, improvements to **pedestrian and cycle access along the A10** would reduce existing severance issues and enhance connectivity. **Enhancing the bus service** offering would also help with cross-borough connectivity from Southbury.

There is high public transport accessibility in some parts of the borough (Edmonton Green, Enfield Town and areas with access to the Piccadilly Line), however some areas rely on lower frequency rail or overground services and buses. Planned growth will place pressure on the already constrained public transport network, particularly in the Opportunity Areas. Therefore, the borough has ambitions for rolling stock upgrades and step free access at every Piccadilly Line station, increases to train frequency through **four-tracking improvements on the West Anglia mainline** between Tottenham Hale and Broxbourne, as well as safeguarding spaces for future improvements to bus, tube and rail services, including for potential **Crossrail 2** routes. **Promoting active travel** through pedestrian and cycling improvements is also a key priority, with the aim of increasing cross-borough connectivity and making the best use of existing and future transport infrastructure.

## Greenwich

The Royal Borough of Greenwich Local Plan (2014) is now very out of date. It covers the period up to 2028 and set out an aspiration to deliver 38,925 new homes and 21,000 jobs over 15 years (or 2,595 homes and 1,400 jobs annually). Greenwich's London Plan annual target of 2,824 is slightly above the current Local Plan target.

The Council are in the process of developing a new Local Plan which is expected to go out to Regulation 19 consultation (a statutory 6 week consultation period) in 2025.

<sup>40</sup> [New Enfield Local Plan | Enfield Council](#)

There are significant opportunities for growth in the Royal Borough of Greenwich, with the following key opportunity areas located in the borough:

- **Thamesmead and Abbey Wood** (which is also partly in LB Bexley) has the potential to deliver 8,000 homes and 4,000 jobs. One of the largest opportunity sites in London, there is significant potential for growth which is dependent on improvements to the area's transport connectivity. The **DLR** is a priority as well as upgrades to the bus network (including **bus rapid transit** and the **Superloop**). The DLR could be transformational and allow for more development to come forward than currently proposed.
- **Charlton Riverside** has the potential to deliver 8,000 homes and 1,000 jobs forming a new mixed-use neighbourhood. There are many barriers to delivery, including key transport constraints as the existing road network lacks permeability and buses cannot currently access the site. The plans include improving existing road network and creating an east west connection to enable bus access to the site. Also enhancing the Thames Path connection for pedestrians and cyclists to connect Greenwich Peninsula to Woolwich town centre. Improved **bus services** are also a priority.
- **Greenwich Peninsula** has the potential to deliver 17,000 homes and 15,000 jobs. There is a need to better connect to other parts of London. A key priority is the **redevelopment of the bus station**.
- **Woolwich** has the potential to deliver 5,000 homes and 2,500 jobs. Thanks to recent investment in the Elizabeth Line alongside the presence of mainline rail, DLR and a major bus interchange there are now good connections to support future economic growth.
- **Deptford Creek/Greenwich Riverside:** has the potential to support 5,500 homes and 3,000 jobs and lies partly in LB Lewisham. The Bakerloo Line extension will support the development of this Opportunity Area.

In relation to the 15 strategic investments, a key priority is to secure investment in the **DLR** to Thamesmead (and Beckton Riverside) (Thamesmead & Beckton Riverside Public Transport Programme). In total, this could enable the construction of up to 25,000-30,000 new homes along the route.

A number of the other strategic investments are important to RBG but may not directly lead to transformational levels of economic growth (as is the case with the DLR). This includes the **Superloop** which responds to a deficit in bus provision (and will be particularly important at key regeneration sites including Thamesmead and Charlton Riverside), the **Thames Ferry Crossings** project which is likely to reduce levels of congestion locally particularly around Charlton Riverside and Thamesmead (two key regeneration areas). The **Thames Piers and Wharves** development could lead to the addition of 3 new crossings to improve river traffic.

Improvements to the **Bakerloo Line** could help improve links to some parts of the borough particularly Eltham (which is not a priority for growth). The **Elizabeth Line to Ebbsfleet** would be transformational for people travelling to Ebbsfleet from Kent and given the presence of the Elizabeth Line within the borough, there would also be some knock-on benefits.

Outside of the 15 priority projects, future transport priorities for the Royal Borough of Greenwich include:

- **Improving East-West routes** across the borough, for example linking Charlton Riverside with other areas. The council are currently carrying out further work to confirm the best road alignment to improve east-west road links within Charlton Riverside.
- **Investing in smaller transport projects** which can improve investor confidence, such as improvements to rail stations within the borough.

- Seeking **re-assurance from TfL that they will not cut public transport services** across the borough.
- The redevelopment of the **bus station at Greenwich Peninsula**.

## Havering

Havering is an outer London Borough whose Local Plan sets out an aspiration to deliver 18,930 homes by 2031.

To the south of the borough, the **Rainham and Beam Park Strategic Development Area** forms part of the **London Riverside** Opportunity Area and, supported by the **Beam Park station** proposals, has the potential to deliver 3,000 new homes and between 3,500 and 4,000 sqm of commercial and retail floorspace. In addition to the new station, the Council is seeking to transform the **A1306** from a traffic dominated corridor into an attractive high quality green street that is more appropriate for the new and expanded residential community.

Since the proposals for **Beam Park** have been developed, the **Thames Freeport** has established at Barking Riverside, providing significant new employment opportunities. Clearly housing growth will help provide the required labour force, but the site will still be dependent on the strategic transport network and, as with other locations, how the bus and cycle networks can be used to expand the catchment of the proposed strategic transport investment is an important consideration.

Other priority locations for growth include the **Romford Strategic Development Area** which has recently benefited from the **Elizabeth Line** and has the potential for over 6,000 new high-quality homes.

While much of the benefit will accrue to areas of Kent and Essex, the **Lower Thames Crossing** will incorporate a new river crossing in Havering and there is the potential for additional growth to be unlocked in the areas closest to the new junction in the east of the borough.

Looking ahead:

- As an out of London Borough, Havering has a high dependency on car transport and a contributing factor is the poor north-south connectivity within the borough – an issue which will become more pronounced with the significant development proposed for **Beam Park** in the south. Work is currently being carried out to consider options for new public transport (including tram / light rail) to **improve north-south connectivity** and how this can link with the existing Romford rail line.
- The Council has aspirations to address issues of congestion and poor air quality around the **Gallows Corner junction on the A12**.
- Around half of the borough is located within the greenbelt which currently acts as a constraint on growth. With the policy debate more actively considering the potential for development on the greenbelt (or 'greybelt'), opportunities may be identified within Havering – however such areas are typically poorly connected and opportunities for addressing this will need to be considered.
- There are proposals to support high value manufacturing on the former Ford site, which similar to Thames Freeport will require improved transport connectivity to for the associated workforce. There is the potential to improve links to Beam Park station to support these proposals.

Beyond the borough boundary, the proposed A13 improvements have the potential to support growth within Havering through improved cross-borough connectivity. The potential for improved cross-borough public transport connectivity is also identified as an area for further consideration.



## Newham

Newham's adopted plan provides an annual housing target of 2,867. Their draft Local Plan (currently at Regulation 19) suggests that ambitions will increase to align with London Plan targets of 4,760 per year<sup>41</sup>. This also reflects the LLDC's targets being incorporated within Newham's, alongside the transfer of powers.

Newham has three Opportunity Areas which are expected to see the majority of growth: **Royal Docks and Beckton Riverside**; **Olympic Legacy**; and **Poplar Riverside**. Because of these links with strategic regeneration areas, a number of Local London's priority transport projects will play a key role in supporting Newham's housing and employment growth ambitions in these areas, including **Stratford Station, River Roding Crossing, Thamesmead and Beckton Riverside Public Transport Programme, Superloop and Stratford International**.

Newham have developed a Sustainable Transport Strategy to support their Local Plan review (currently at Regulation 19). In this document, the borough highlights further transport ambitions to respond to and unlock growth in the short and long term and address other local challenges including air pollution and inequality<sup>42</sup>.

While the **Thamesmead and Beckton Riverside Public Transport Programme** will support housing growth at Beckton Riverside, further rail connectivity improvements such as **eastward extension of the DLR** would support further growth. The borough will also look to secure the greatest benefits from the opening of the **Silvertown Tunnel** by improving bus connectivity to link the Riverside with Stratford and Greenwich and will continue to develop proposals for a **new station at Thames Wharf**.

As well as the capacity improvements required at **Stratford Station**, enhancements will be required at **Canning Town** and **West Ham** to manage pressures from developments in these areas and further east, especially in light of the stations' key roles as interchanges.

**Active travel** is a priority for the borough, including improvements to cycle routes and footways, cycle parking, healthier neighbourhoods, walking and cycling routes for leisure and wayfinding. Prioritising buses and improving bus services are also key priorities, in particular in areas with less public transport access (north-south routes) and in areas where growth is expected and bus use is low, such as the **Royal Docks** and at **Beckton Riverside**.

## Redbridge

The Redbridge Local Plan sets out an aspiration to deliver 17,250 homes and 5,000 jobs by 2030.

The main focus of growth in the borough is **Ilford** (an Opportunity Area) where it was anticipated that 6,000 new homes and 500 jobs would be enabled from the arrival of the **Elizabeth Line**. However, to date less than 1,000 homes have been delivered and, while there are a range of factors constraining housing delivery in Ilford and across London more generally, the road layout, and specifically the impact of through traffic, is identified by the council as a major local challenge and a factor limiting housing delivery.

<sup>41</sup> [local-plan-2024-web-part-1- \(newham.gov.uk\)](https://www.newham.gov.uk/local-plan-2024-web-part-1/)

<sup>42</sup> [newham-sustainable-transport-strategy-2024-](#)



To address these challenges, the council have identified improvements to the **Ilford Western Gyratory** which are considered as being critical to unlocking housing growth in the area and to realising the benefits provided by the Elizabeth Line, as well as providing benefits for the Superloop route to Ilford. There is currently a disjoint between the physical environment associated with the gyratory – which attracts through traffic avoiding congestion elsewhere rather than journeys servicing local needs – and the desire for a high-quality environment that favours pedestrians, cyclists and public transport and is more suitable to the higher density development proposed for the area. The potential to divert traffic passing through Ilford specifically and Redbridge more generally onto better suited strategic routes is identified by the council as a priority for any future proposals to improve the local network.

In relation to the 15 strategic transport investments, Redbridge is served by the **Superloop** which has recently started to operate and provides some additional connection within and into the borough and would benefit from the proposals for Ilford Western Gyratory.

In August funding was confirmed for the Ilford Arrival project from the Mayor's Civic Partnership Programme (CPP). This will see five interventions to better connect Ilford Town Centre with the Roding Valley and will include a bridge and pocket park to cross the River Roding; a pedestrian and cycling route that connects the area; a detailed design for the Ilford Western Gyratory and Island Garden Junction; the creation of an Urban Room as a space to engage young local people in city making processes; and rewilding the Ilford Golf Course. As well as the links to Ilford Western Gyratory, these proposals align with the **River Roding Crossings** strategic investment project.

The Ilford Western Gyratory was not included among Local London's strategic transport investments as, in 2023 when the project was agreed, it was considered that the proposals for the gyratory were not at a sufficiently advanced stage. However, the proposals have the potential to unblock housing development in one of the sub-region's Opportunity Areas and to build on the strategically significant improvement in transport connectivity provided by the Elizabeth Line. On this basis, as the proposals are further development it may be appropriate to include the Ilford Western Gyratory in this list of investments.

Looking ahead, additional future transport priorities for the borough will include:

- Transport improvement including new bus routes around **Billet Road** which suffers from congestion and would enable development to the north of the borough.
- Capacity constraints on the **A12** and **Central Line**.

## Waltham Forest

Waltham Forest's recently adopted Local Plan (2024) outlines the Borough's ambitions to deliver 27,000 net additional homes between 2020 and 2035. At an average of 1,800 homes per annum, this is more ambitious than the 10-year minimum target outlined in the London Plan (1,264 per annum).

As a key transport interchange in the borough, the proposed infrastructure enhancements at **Walthamstow Central Station** are key to supporting housing and population growth ambitions. The interchange also has a bus station which is linked into the new **Superloop** route.

The **Lee Valley Opportunity Area** spans the west of the borough on its borders with the boroughs of Hackney, Haringey and Enfield. The London Plan suggests an indicative capacity for 21,000 homes and 13,000 jobs by 2041.

The south of the borough offers the greatest opportunities for regeneration and inclusive growth, with ambitions to deliver 14,930 homes. The majority of homes are proposed at strategic locations, with the largest including **Lea Bridge, Leyton, Leytonstone Town Centre** and **Whipps Cross**. At the Leyton strategic location, the borough will support ambitions to create a new mixed-use neighbourhood of Leyton Mill, focused around a potential **new rail station at Ruckholt Road**.

The borough has long-term aspirations to reinstate the **Meridian Line rail service** to link the Chingford to Liverpool Street route to the Coppermill Junction to Stratford line. This would improve connections with Stratford City, the Olympic Park (LB Newham) and other regeneration areas in the Lower Lea Valley.

The north of the borough is generally suburban with lower density than the central and south. Improving linkages with the rest of the borough is a key priority, including through **bus infrastructure** and **active travel links** in order to reduce reliance on cars. The borough has had success to date with its award winning Enjoy Waltham Forest (Mini Holland) network of dedicated cycle lanes, which it is looking to build on to create new and improved connections to employment, education and leisure opportunities across the borough.

The borough is also currently working with TfL to deliver step free access and capacity improvements at **Leyton Underground Station**, as part of the borough's wider ambitions to deliver step-free access at all stations by 2040, having secured £13.7m Government funding matched by the Council's £9m funding contribution from investing borough Community Infrastructure Levy receipts.

The Council is undertaking consultation on its site allocations which goes into further detail on the capacity and timelines for delivery of key sites up to 2035, while identifying priorities for investment in critical infrastructure, including **Walthamstow Central Station**.<sup>43</sup>

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<sup>43</sup> <https://talk.walthamforest.gov.uk/hub-page/localplanpart2>

## 6 Conclusions and Next Steps

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The list of priority transport project was initially developed through a workshop with borough officials in the spring of 2023, which identified a list of major transport projects with sub-regional significance. This list of projects has been developed further with boroughs over time to reflect current need and status.

The report findings have been developed using publicly available evidence on the impacts of the 15 priority projects, as well as evidence shared with ekosgen for the purposes of this assessment and discussions with the teams involved in each project's development. Further qualitative evidence on future needs and priorities has been gathered from key stakeholders, including economic development, planning and transport representatives from Local London's boroughs and key strategic partners including TfL, GLA, MHCLG, DfT and the Thames Estuary Growth Board.

### Key Findings

The Local London sub-region has the potential to make a significantly greater contribution to the London and UK economy. It has the fastest growing population in London and is home to a large proportion of London's Opportunity Areas. There are ten adopted Opportunity Areas with potential to deliver around 183,500 new homes and 174,500 jobs, with even greater potential at five further emerging Opportunity Areas. Further growth opportunities also exist across the Local London sub-region – in smaller development locations or areas of the capital that have the potential to be prioritised for growth over the medium and longer term.

However, in order to meet this potential, investment will be required to enable growth at both a local and strategic level. Like other parts of Outer London, many boroughs in the Local London sub-region are poorly served by public transport, resulting in a high proportion of trips by car. This presents challenges when seeking to build at higher density or in a sustainable way.

The sub-region also faces a series of challenges that are unique or more acutely felt here than in other parts of the capital. North-south movement across the sub-region is constrained by the limited number of Thames crossings, which restricts movement (particularly walking and cycling) and results in significant congestion in areas where crossings do exist.

While much of the sub-region is well served by national rail infrastructure – these routes often do not provide the metro style 'turn up and go' services expected across much of the London network and by predominantly providing links to London Terminals, access into and across London is more restricted than areas better served by TfL services.

In addition, while being home to many of London's Opportunity Areas demonstrates the potential for significant growth, it also represents a challenge. Many of these brownfield sites – many of which were home to former industrial locations – are not well served by the strategic and social infrastructure required for high-quality and sustainable mixed use and residential neighbourhoods. While many areas are close to train lines, connections to the network are often poor with access typically provided by road. In many cases these roads are nationally significant arterial routes which create issues around severance and the quality of existing and proposed communities. This impacts on the viability of development locations due to the combination of lower potential sales values alongside significant costs associated with site preparation and remediation and the need to provide the strategic and social infrastructure

necessary to satisfy planning conditions and create communities that work for its residents and surrounding areas.

In light of these issues, the 15 priority projects will be important in supporting sub-regional growth aspirations – whether by directly unlocking sites for development, by providing additional capacity and resilience across the transport network, or by making the sub-region a more attractive location to live and work. Given the breadth of interventions considered, the mechanism by which the transport projects will drive these outcomes will differ by project. This includes unlocking housing and commercial developments, directly and indirectly supporting jobs, delivering transport user benefits, generating carbon savings and delivering air quality benefits.

## Recommendations

The Local London sub-region has the potential to make a major contribution to the UK's ambitions for housing and employment growth. Looking ahead, it will be important for Local London, its boroughs and partners to continue to make the case for the supporting and enabling investments if this ambition is to be delivered on.

However, these ambitions do not exist in a vacuum and in a tight fiscal environment, Local London and its partners may wish to **consider prioritising the 15 priority projects**. Given the varying degrees of project development, this could be one factor against which prioritisation could be considered – with some projects being able to present a clearer proposition at this stage. Another factor may be the extent to which projects are identified as directly enabling sites or areas for growth as it may be easier to initially build a case around these projects to maintain momentum, and to ensure that sites are able to come forward for development as planned. Local London may decide that other factors are important and since the Government and the Mayor of London's priorities are still being developed, boroughs may also wish to take a view on priorities once this has become clearer.

It is important to note that these 15 priority projects are not exhaustive of transport ambitions within the sub-region. Each borough has a wider set of priorities that are important to deliver their borough ambitions. While some of these wider ambitions are larger scale - for example the Ilford Western Gyratory which may benefit from case making at the sub-regional level - some are smaller scale, such as active travel improvements or the expansion of bus services that do not require significant new infrastructure.

While it is important to maintain a focus on the larger and more strategic transport investments as these will take significantly longer to plan and implement, **the value of these smaller schemes to (i) deliver significant localised benefits in the shorter term and (ii) complement and expand the impact of the more significant transport investments, should not be overlooked**. In relation to this second point, rail and major road enhancements will deliver significant strategic benefits, but it is important to consider how this is integrated into local networks and communities to maximise their reach and potential impacts. For example, by ensuring complementary investment in walking, cycling and buses (such as at Thamesmead).

While much of this activity on smaller schemes can take place at a borough level, **there may be a role for boroughs to co-ordinate activity where such schemes cross, or are located close to, borough boundaries** and therefore have the potential to impact multiple areas. Examples highlighted through the borough consultations include the potential for co-ordinated efforts to make the case for new and expanded bus routes by aggregating demand across multiple areas.

In addition, it is important to **recognise that the list of priority projects will evolve over time**. The development of the London Growth Plan could provide new priorities for driving sustainable and inclusive economic growth. New priorities will be acknowledged as additional development locations are identified and it is important that where investment is made, consideration is given to these longer-term opportunities.

## A.1. Transport Policy Position Data

### Method of travel to work

Area	Work from home	Underground, metro, light rail, tram	Train	Bus, minibus or coach	Taxi	Motorcycle, scooter or moped	Driving a car or van	Passenger in car or van	Bicycle	On foot	Other travel to work
Barking & Dagenham	20.7	16.2	9.2	10.2	0.6	0.6	32.5	2.5	1.3	4.7	1.5
Bexley	34.5	2.4	10.3	6.6	0.6	0.7	36.0	2.5	0.8	4.5	1.2
Bromley	46.6	1.9	9.4	5.0	0.4	0.6	27.9	1.8	1.1	4.3	1.0
Enfield	31.3	8.7	5.0	10.6	0.6	0.5	32.5	2.2	1.4	5.7	1.5
Greenwich	40.5	9.5	8.7	10.7	0.4	0.6	20.0	1.5	1.9	4.9	1.2
Havering	33.4	6.7	7.0	5.6	0.6	0.5	36.8	2.7	0.7	4.9	1.2
Newham	29.2	23.5	8.6	9.1	0.5	0.7	17.3	1.5	2.3	6.0	1.4
Redbridge	34.9	14.6	6.0	5.8	0.6	0.5	28.4	2.1	1.1	4.8	1.3
Waltham Forest	37.6	17.9	4.9	7.2	0.5	0.6	19.6	1.4	3.5	5.5	1.2
Essex	32.3	1.1	3.2	1.7	0.5	0.4	48.2	3.5	1.4	6.6	1.0
Hertfordshire	39.4	1.2	3.4	1.7	0.5	0.4	41.4	3.0	1.2	6.9	0.9
Kent	31.1	0.2	3.5	2.1	0.4	0.5	48.4	3.9	1.2	7.8	1.0
London	42.1	9.9	5.3	8.9	0.5	0.7	20.6	1.5	3.0	6.4	1.2

Source: 2021 Census, Office for National Statistics.

# Transport Needs and Opportunities Assessment

Area	Work from home	Underground, metro, light rail, tram	Train	Bus, minibus or coach	Taxi	Motorcycle, scooter or moped	Driving a car or van	Passenger in a car or van	Bicycle	On foot	Other travel to work
Barking & Dagenham	2.2	21.9	12.4	12.6	0.5	0.8	38.2	2.8	1.4	6.3	0.6
Bexley	3.6	2.6	25.1	8.9	0.9	1.3	47.3	3.1	1.2	5.6	0.6
Bromley	5.8	3.3	30.8	7.5	0.5	1.1	40.3	2.2	1.5	6.3	0.6
Enfield	4.3	15.5	11.9	13.3	0.5	0.7	42.4	2.6	1.4	6.5	0.7
Greenwich	4.0	15.3	23.5	16.2	0.5	1.1	27.7	1.9	2.3	6.5	0.9
Havering	3.6	9.5	18.0	7.7	1.1	0.9	48.2	3.2	0.9	6.3	0.6
Newham	2.4	39.8	12.5	13.2	0.3	0.6	20.4	1.5	1.7	7.1	0.6
Redbridge	4.2	29.4	9.9	7.4	0.9	0.6	37.6	2.3	1.1	5.9	0.6
Waltham Forest	3.4	33.2	10.3	11.1	0.6	0.9	28.4	1.9	2.8	6.7	0.6
Essex	5.4	2.3	10.6	3.3	0.6	0.7	60.5	4.7	2.1	9.2	0.6
Hertfordshire	6.2	2.4	11.5	3.2	0.5	0.7	60.0	4.1	1.7	9.3	0.5
Kent	6.0	0.3	9.2	3.8	0.4	0.9	60.9	5.1	1.7	11.2	0.6
London	5.1	22.6	13.3	14.0	0.5	1.1	28.0	1.7	4.0	8.8	0.7

Source: 2011 Census, Office for National Statistics.



**Method of travel to work is driving a car or van, by occupation (job type), where this represents 50% or more of total employed residents – highlighted in red**

	All categories: Occupation	1. Managers, directors and senior officials	2. Professional	3. Associate professional and technical	4. Administrative and secretarial	5. Skilled trades	6. Caring, leisure and other service	7. Sales and customer service	8. Process, plant and machine operatives	9. Elementary
Barking & Dagenham	36.4	41.6	36.9	34.9	30.3	46.4	31.7	26.3	59.1	27.2
Bexley	44.7	47.3	47.3	38.5	35.9	57.0	48.6	40.4	56.6	38.1
Bromley	37.7	37.5	38.7	29.1	30.9	54.1	46.1	32.6	53.2	34.1
Enfield	40.0	46.0	42.6	34.3	35.4	51.0	38.5	32.9	56.5	28.3
Greenwich	26.1	27.4	26.4	19.6	20.5	40.1	26.6	21.2	50.5	19.2
Havering	45.5	48.5	48.2	38.5	36.2	58.2	49.8	38.1	56.9	41.4
Newham	19.2	25.8	19.8	16.5	15.0	26.3	15.2	12.1	48.6	11.8
Redbridge	35.3	43.4	37.4	28.2	27.6	45.3	35.6	28.8	52.4	28.0
Waltham Forest	26.8	32.1	28.9	22.2	22.6	35.8	25.9	20.4	45.9	16.2
Essex	57.0	57.8	60.9	51.1	53.8	66.2	57.9	48.9	67.4	49.3
Hertfordshire	56.6	57.2	57.7	53.6	58.4	66.0	56.8	47.4	66.0	47.0
Kent	57.4	57.5	61.7	55.5	57.1	64.8	56.8	48.6	67.0	46.4
England	53.9	57.2	58.4	52.2	54.5	60.8	51.8	42.7	64.5	40.9
London	26.3	28.7	24.6	19.8	24.1	40.2	27.4	21.8	50.6	20.1

Source: 2011 Census, Office for National Statistics.

**Number of Tube Stations by borough**

Borough	Number of TFL Stations*	Number of Served Lines	Elizabeth Line Stops
Barking and Dagenham	5	2	
Bexley	-	-	2
Bromley	-	-	
Enfield	4	1	
Greenwich	1	1	
Havering	4	1	3
Newham	6	4	5
Redbridge	10	1	4
Waltham Forest	4	2	

[Of 272 TfL stations, only 12.5% (34 stations) lie within Local London. Stations listed above are TFL only. Data excludes DLR as this is not part of the TFL network].

## A.2. Bibliography

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Our approach is based on a literature review of the publicly available evidence on the impacts of the 15 priority projects, as well as evidence shared with ekosgen for the purposes of this assessment and discussions with the teams involved in project development. A list of the publicly available evidence is provided below.

Local London (2024), Transport Policy Position. (Available at: [Local-London-Transport-Policy-Position-Paper.pdf](#))

Local London (2023), Local London Plan Towards 2026. (Available at: [Local London Plan - Towards 2026](#))

TFL (2022), Mayors Transport Strategy. (Available at: [Mayor's Transport Strategy](#))

GLA (2021), London Plan. (Available at: [the\\_london\\_plan\\_2021.pdf](#))

Thames Estuary (2022), Green Blue action plan. (Available at: [Thames-Estuary-Green-Blue-Action-Plan-UpdatedOct22.pdf](#))

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