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Crossing
Consultation
Note

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TABLE OF CONTENTS

EXECUTIVE SUMMARY2

1.1 Background to this Note.....2

1.2 Key Identified Benefits.....2

1.3 Key Considerations.....3

1 INTRODUCTION5

1.1 Context5

1.2 Purpose of this report.....5

**2 REPORTED ECONOMIC BENEFITS – TFL EVIDENCE
BASE.....6**

2.1 Introduction.....6

2.2 Findings from River Crossings Development Study6

3 KEY CONSIDERATIONS.....10

3.1 North and South of the River.....10

3.2 Benefits for Local People10

3.3 Local Growth Aspirations.....11

3.4 Funding, Cost and Delivery.....12

3.5 Business Survey Implications12

4 CONCLUSIONS AND SUMMARY14

EXECUTIVE SUMMARY

1.1 Background to this Note

At present there are only three highway cross-river links within East London with a strategic gap identified between the Woolwich Ferry crossing and the Dartford Crossing. This represents a gap in connectivity between north and south of the river and places significant pressure on existing crossings reducing their resilience during periods of peak congestion and increasing journey times across the wider road network in East and South East London.

Transport for London (TfL) therefore considers that east London could require a number of new river crossings between now and 2050 to support projected increases in population growth and higher rates of economic growth within key opportunity and growth areas within East and South East London.

TfL is currently undertaking a consultation exercise on the River Crossings Programme; the aim of which is to make it easier to cross the River Thames between east and south-east London. This report provides a high level review and critical analysis of the current proposals and associated evidence base for the River Crossings programme. It summarises the potential economic impacts on LB Havering with a particular focus on a new bridge crossing between Belvedere and Rainham and a new bridge crossing at Gallions Reach.

1.2 Key Identified Benefits

The key evidence base document detailing the potential economic impact of the new river crossing options in regards to new jobs and housing is the River Crossings Development Study (2014) which applies DfT's WebTAG guidance. The study adopts the premise that transport can facilitate development through improving connectivity and access to customers, labour markets and jobs.

Broadly the study states that for all river crossing scenarios access to jobs is estimated to be greatest on the south side of the river whilst access to the labour force is estimated to be greatest on the north side of the river. However, the study finds that the Belvedere Bridge crossing is the only option which is likely to have some economic impact on Havering with regard to increasing the potential viability of sites and unlocking them for residential and commercial development.

The Gallions Reach bridge option is assessed as having the greatest development impacts of all crossing options with the potential to create between 25,000-34,000 net jobs and support the development of 18,400-23,800 new homes in the study area¹ as a whole². In comparison, the Belvedere bridge option is estimated to create between 22,200-28,900 net jobs and support the development of 17,300-22,000 new homes in the study area as a whole.

In terms of the Belvedere bridge option, the study finds there will be a 'low' relative impact on development potential resulting from changes in connectivity for residential, office, retail and leisure and industrial floorspace in both London Riverside and the Rest of Havering. In contrast, there will be a medium to high impact on development potential for all use types within Erith and Belvedere and the 'Rest of Bexley'.

Comparatively, for the Gallions Reach bridge option, the study finds there will be no impact on development potential within the Rest of Havering, whilst within London Riverside there will be a low impact on development potential for both office and industrial uses. In contrast both Erith

¹ The study area used within the River Crossings Development Study (2014) includes the eight London boroughs of Barking and Dagenham, Bexley, Greenwich, Havering, Lewisham, Newham, Southwark and Tower Hamlets.

² Please note the River Crossings report does not provide a breakdown of these net jobs by local area (e.g. London Riverside or Rest of Havering).

and Belvedere and the Rest of Bexley would experience the same level of impact on development potential as compared to the Belvedere bridge option.

1.3 Key Considerations

- There is a significant contrast between the benefits identified between both LB Havering and LB Bexley; with estimates of significantly greater benefits for the south of the river. The Belvedere bridge crossing is presented as an important catalyst for creating a step change in accessibility south of the river which will help drive residential and employment growth. For LB Havering however, there are significantly less development impacts identified in regards to the quantum of residential units and industrial, office, retail and leisure floorspace estimated to come forwards as a result of a new crossing between Rainham and Belvedere.
- The proposal for the Belvedere bridge crossing will enhance transport connectivity within LB Havering and increase the number of jobs accessible for its residents. However, it is unclear how significant this benefit will be when placed within the context of low educational attainment and skill levels within LB Havering. Given existing skills and qualification levels amongst Havering residents, this makes it less likely that Havering's population will be equipped to compete for employment opportunities both locally and further afield. The extent to which these new accessible jobs provide viable new employment opportunities for local people within LB Havering therefore is likely to be limited.
- The increased accessibility of Havering residents to labour markets further afield as a result of the proposed Belvedere bridge crossing, may not directly translate into a net benefit as it is likely that the majority of these jobs are currently filled. It is not apparent within the current evidence base that an analysis of job vacancies within the area has been undertaken.
- The proposed Belvedere bridge crossing may have direct implications for site specific growth aspirations for sites defined within LB Havering's Site Specific Allocations document (2008). This includes the Beam Park site (SSA11) and the Rainham West site (SSA12). A new station and a new local centre are also envisaged at the Beam Park site. Both sites are located less than 300m from where the proposed bridge crossing connects to the A13 and it is likely that significant landscape and visual, noise and traffic³ adverse impacts could be felt at these locations which could have implications for the viability of these two sites particularly with regards to residential uses.
- The proposed bridge crossing could also have direct implications on the London Riverside Opportunity Area in terms of adversely affecting employment growth. The current route shows the bridge crossing intersecting the eastern portion of the Opportunity Area and as a result the Beam Reach 6 site will experience direct land take. The Beam Reach 6 site, which is currently being actively marketed by the GLA, has also recently benefited from EU funding to help remediate the site and has been identified as having capacity for 25,000sqm of industrial and warehousing space.
- LB Havering are currently in the process of submitting their application for a Housing Zone to be designated within the London Riverside Opportunity Area. A significant number of the key sites identified within the Housing Zone are located within the Beam Park and Rainham West site allocations. The potential impact of the proposed Belvedere bridge crossing on the viability of residential development within these sites could therefore be detrimental to achieving growth targets within the Housing Zone.

³ Proposals suggest the Bridge could carry up to 1,500-1,600 vehicles per hour in one direction at peak times.

- There are however areas within the Opportunity Area which are unlikely to be directly affected by the new river crossing and the improved transport connections and accessibility to these areas could have a beneficial effect in terms of delivering residential and commercial development and unlocking previously isolated sites. A new river crossing between Rainham and Belvedere may help improve the attractiveness of key sites for development and help to deliver them at a faster pace than under alternative scenarios.
- The proposed Belvedere bridge crossing may have a beneficial impact on existing key industrial sites within the area including the Beam Park Business Park, Ferry Lane industrial estate and Rainham employment area for example. The Rainham employment area has been defined as an employment hub within the London Plan (2011). Any improvement in road connectivity through easier connections to the south of the river could therefore increase Havering's reputation as a strategic industrial hub within East London. However, the benefits of enhanced transport connectivity should be balanced with potential adverse impacts in terms of increased traffic congestion on the local road network (A13 and A1306).
- The proposed Belvedere bridge crossing is not currently specified within LB Havering's local planning policy nor is it currently safeguarded whilst land designated for new employment uses within the London Riverside OAPF will be subject to land take as a result of the current alignment.
- The East London River Crossings Needs and Options report (2014) identifies a total cost of approximately £500-£900m for the proposed Belvedere bridge crossing. It will be important for further clarity to be provided on the funding options which are currently being considered and whether the viability of current transport proposals in LB Havering may be affected such as a new station at Beam Park and the extension of the East London transit from Dagenham to Rainham. The evidence base does not consider the extent to which a new river crossing could be provided at the expense of existing transport infrastructure proposals and the impact this could have for growth aspirations within the Borough.
- The East London River Crossing Business Survey (2014) sampled 800 businesses across eight East London boroughs, with approximately 100 businesses interviewed in each borough. In total almost half (47%) of businesses surveyed in Havering said river crossings were not important to successful business operations (the 2nd highest of any of the boroughs surveyed) compared to 33% of businesses in Bexley. Furthermore, only 25% of respondents within Havering stated that the river was a barrier to development across the other side compared to 40% in Bexley. This demonstrates the differences in business perceptions to the river within both Havering and Bexley and indicates that businesses within Bexley appear to have a greater need for a new crossing compared to those in Havering. The study also suggests that those businesses surveyed within LB Havering do not place much significance on a new river crossing to their continued operations and future growth.

1 INTRODUCTION

1.1 Context

Transport for London (TfL) is currently undertaking a consultation exercise on the River Crossings Programme; the aim of which is to make it easier to cross the River Thames between east and south-east London. At present there are only three highway cross-river links within East London with none between the Woolwich Ferry and the Dartford Crossing. This represents a significant gap in connectivity between north and south of the river of approximately 14km and places significant pressure on existing crossings reducing their resilience during periods of peak congestion and increasing journey times across the wider road network in East and South East London. There is currently an identified need for further river crossings to facilitate more local road traffic movements and increase network resilience.

The East London River Crossings Needs and Options report (2014, p.5) outlines that within the East London sub-region there are "14 opportunity area and areas for intensification, accounting for 27% of London's overall development land potential". TfL therefore considers that east London could require a number of new river crossings between now and 2050 to support projected increases in population growth and higher rates of economic growth within these areas as well as alleviating pressure on existing river crossings including the Blackwall tunnel.

A lack of connectivity within this sub-region is having detrimental economic effects, namely restricting access to markets as well as limiting people's access to employment opportunities on both sides of the river. Improvements in local cross river connections are therefore vital to the effective functioning of East London in catering to the existing and future demand for cross river movements.

There are currently three locations which have been assessed as suitable for new river crossings within East London and four potential options have been shortlisted for consultation:

1. A new modern ferry service at Woolwich;
2. A ferry service at Gallions Reach;
3. A bridge at Gallions Reach; and
4. A bridge at Belvedere.

1.2 Purpose of this report

This note provides a high level review and critical analysis of the current proposals and associated evidence base for the River Crossings programme. It summarises the potential economic impacts on LB Havering with a particular focus on Option 4; a new bridge crossing between Belvedere and Rainham.

This review will establish the level and robustness of the economic impact analysis undertaken to date in regards to this option and will outline where any gaps in the evidence base exists. It will also compare these findings to the option of a new bridge at Gallions Reach (Option 3).

For the purposes of this note we have reviewed TfL's consultation evidence base on the River Crossings programme portal. The documents reviewed include the River Crossings Development Study (June 2014), the River Crossings Needs and Options report (July 2014) and the River Crossings Business Survey (May 2014). In addition we have considered London Riverside BID socio-economic analysis (2014) undertaken by LB Havering and relevant local policy documents such as the LB Havering Core Strategy and Development Control Policies DPD (2008) and the Site Specific Allocations DPD (2008).

2 REPORTED ECONOMIC BENEFITS – TFL EVIDENCE BASE

2.1 Introduction

The key evidence base document detailing the potential economic impact of the new river crossing options in regards to new jobs and housing is the River Crossings Development Study (2014). This report uses DfT's WebTAG guidance to inform the economic impact assessment of each river crossing option.

The study adopts the premise that transport can facilitate development through improving connectivity, and therefore access to customers, labour markets and jobs, subsequently raising land values and encouraging developers to build to meet the increase in demand. Principally it is argued that the overall level of development facilitated by improvements to road connectivity can be directly related to the change in access to jobs, the workforce and customers.

The River Crossings Study acknowledges that transport infrastructure alone does not create economic potential and recognises that favourable macro-economic conditions, availability of skilled labour and a favourable environment for business investment will also be critical factors in achieving this.

The approach taken by the study is anchored by an assessment of the intervention case scenarios compared with the reference case. The six scenarios considered within the River Crossings Study are set out below:

1. Reference case- this assumes that no river crossing options are delivered.
2. Reference case + Silvertown Tunnel
3. Reference case + Silvertown Tunnel and a new ferry service at Gallions Reach
4. Reference case + Silvertown Tunnel and a new river bridge at Gallions Reach
5. Reference case + Silvertown Tunnel and a new ferry service at Gallions Reach
6. Reference case + Silvertown Tunnel and a new river bridge at Belvedere.

The scenario within the study which was assessed to have the greatest economic impact on London Riverside and LB Havering is Scenario 6 which includes the reference case, the Silvertown Tunnel option and a new bridge crossing at Belvedere. In turn this report also considers the economic impact of Scenario 4 which was assessed to generate the greatest economic impact overall on the study area⁴. These findings from the River Crossings Study are set out in more detail below.

2.2 Findings from River Crossings Development Study

The River Crossings Development Study (2014) identifies economic impacts relative to Property Market Areas (PMAs). For the purposes of this report we consider those PMAs of relevance to LB Havering (London Riverside PMA and 'Rest of Havering PMA) and those of relevance to LB Bexley (Erith and Belvedere PMA and 'Rest of Bexley PMA) for both scenarios. Key findings are outlined below.

- For all river crossing scenarios access to jobs is considered greatest on the south side of the river whilst access to the labour force is considered greatest on the north side of the river which could drive increased business investment.

⁴ The study area used within the River Crossings Development Study (2014) includes the eight London boroughs of Barking and Dagenham, Bexley, Greenwich, Havering, Lewisham, Newham, Southwark and Tower Hamlets

- The report indicates that industrial development (construction, logistics and distribution sectors) is perhaps likely to see the greatest benefit from improvements in road based connectivity. Although the industrial sector has been in decline the report indicates there are still opportunities for growth where good quality sites and premises can be bought forward.

2.2.1 **Option 6- Belvedere Bridge**

- The findings suggest Scenario 6 is the only option which is likely to have a material impact on Havering in terms of increasing the potential viability of sites and unlocking them for residential and commercial development. A new river crossing would open up access to North East London although it will not provide the step change in connectivity that will occur on the south side of the River, where connectivity is already much poorer. This represents a significant opportunity for LB Bexley.
- The London Riverside and the 'Rest of Havering' will see an increase in the average number of accessible jobs⁵ to 16% and 15% respectively. In contrast the south of the river stands to gain more in terms of accessibility to jobs. Under scenario 6, Erith and Belvedere and the 'Rest of Bexley' will see an increase in the average number of accessible jobs of 69% and 71% respectively.
- The average number of accessible economically active people⁶ within London Riverside and the Rest of Havering is expected to increase by 13% and 12% respectively. Comparatively within Erith and Belvedere and the 'Rest of Bexley' an increase of 69% and 17% is expected.
- Scenario 6 will have a 'low' relative impact on development potential resulting from changes in connectivity for residential, office, retail and leisure and industrial floorspace in both London Riverside and the Rest of Havering. In contrast, there will be a high impact on development potential across all land use types within Erith and Belvedere. Within the 'Rest of Bexley' there will be a high impact on residential development, a medium impact on retail and leisure and a low impact on office and industrial development.
- Some town centre retail development in Outer London centres, such as Rainham, where car use is higher could benefit from an improved river crossing.

2.2.2 **Comparison with Option 4- Gallions Reach Bridge**

- Scenario 4 is estimated to increase the number of accessible jobs within Erith and Belvedere by 211% and within the Rest of Bexley by 99%. In contrast, Scenario 4 results in no increase in accessible jobs for residents within London Riverside or the Rest of Havering.
- Scenario 4 is anticipated to increase the average number of economically active people within Erith and Belvedere by 62%. There is expected to be a much lower impact within the Rest of Bexley (11% increase) and within both London Riverside (12% increase) and the Rest of Havering (2% increase).
- With regard to the number of accessible businesses⁷ there is estimated to be a significantly greater impact south of the river compared to north of the river. Within Erith and Belvedere there is expected to be a 129% increase in the number of accessible businesses and in the Rest of Bexley there is estimated to be an 11% increase. Conversely north of the river, there is estimated to be no increase within London Riverside and a 3% increase within the Rest of Havering.

⁵ Access to jobs is defined as the number of jobs that are accessible within 37 minutes travel time by car from each transport zone.

⁶ Access to economically active people is defined as the number of economically active people by car to each transport zone.

⁷ Access to businesses is defined as the number of businesses that are accessible within 45 minutes by car from each transport zone.

- Similar to Scenario 6, Scenario 4 is the only other scenario which is likely to create a step change in accessibility to Belvedere increasing the potential for significant development.
- Under Scenario 4 both Erith and Belvedere and the Rest of Bexley would experience the same impact on development potential as under Scenario 6. In contrast Scenario 4 would have no impact on development potential within the Rest of Havering, whilst within London Riverside there would be a low impact on development potential for both office and industrial uses. This represents a decrease in the impact on development potential for the north of the river compared to Scenario 6.

2.2.3 **Development Impacts- Scenario 4 and Scenario 6**

Scenario 4 has the greatest development impacts of all crossing options with the potential to create between 25,000 and 34,000 net jobs and support the development of 18,400 to 23,800 new homes in the study area as a whole⁸. In comparison, Scenario 6 is estimated to create between 22,200-28,900 net jobs and support the development of 17,300 to 22,000 new homes in the study area as a whole.

With regards to both LB Havering and LB Bexley, **Table 2.1** outlines the development impacts of both Scenario 4 and Scenario 6 on the relevant PMAs within both London boroughs. Impacts on development are outlined for residential, retail, leisure, office and industrial uses. There is clear evidence that suggests that there will be greater development benefits, in terms of residential units and employment floorspace being brought forward, for south of the river compared to north of the river. It should also be noted that there are no identified development impacts (in terms of residential units and employment floorspace being brought forward) for London Riverside and the Rest of Havering under Scenario 4.

Furthermore, for Scenario 6, the limited development impact on London Riverside and the Rest of Havering compared to other areas can be highlighted with regards to industrial floorspace. For example, whilst London Riverside will capture between 8%-9% of the industrial floorspace impact, in contrast, Erith and Belvedere and Barking Riverside will capture between 20%-23% and 36%-40% of the impact respectively.

Comment [DW1]: As highlighted in the footnote the TFL study does not provide a breakdown of development jobs attributed to local area. We could apply some employment densities to estimate a breakdown of jobs by local area but this would be taking the TFL analysis a step further.

⁸ Please note the River Crossings report does not provide a breakdown of these net jobs by local area (e.g. London Riverside or Rest of Havering).

Table 2-1 Estimated Development Impacts

PMA	Residential (units)		Office (sqm)		Retail (sqm)		Leisure (sqm)		Industrial (sqm)	
	2013-20	2020-30	2013-20	2020-30	2013-20	2020-30	2013-20	2020-30	2013-20	2020-30
	Scenario 4 - Reference case + Silvertown Tunnel + Gallions Reach Bridge									
Erith & Belvedere		7,600-10,300		13,000-17,000		10,000-14,000		3,000-4,000	53,000-62,000	-60,000 to -80,000
Rest of Bexley	500-550	700-1,000		2,600-3,500		6,000-8,000		5,600-7,500		11,000-15,000
London Riverside										
Rest of Havering										
Scenario 6 - Reference case + Silvertown Tunnel + Belvedere Bridge										
Erith & Belvedere		5,600-7,500		10,000-14,000		5,500-7,500		2,500-3,500	53,000-62,000	-21,000 to -28,000
Rest of Bexley	500-550	400-530		1,700-2,300		3,800-5,200		3,800-5,200		
London Riverside	1,550-1,700									11,000-15,000
Rest of Havering						4,700-6,300		3,400-4,600		

Source: River Crossings Development Study (2014)

3 KEY CONSIDERATIONS

This section identifies key points of consideration with regards to the proposal to construct a new bridge crossing linking Rainham and Belvedere. This includes an appreciation of the current evidence base underpinning this proposed bridge crossing, an analysis of the reported benefits and implications of the proposals on the LB Havering's growth plans and targets.

3.1 North and South of the River

The London Riverside and the 'Rest of Havering' areas will see an increase in the average number of accessible jobs to 16% and 15% respectively, whilst Erith and Belvedere and the 'Rest of Bexley' areas will see an increase in the average number of accessible jobs of 69% and 71% respectively indicating a much larger benefit for Bexley's residents. It is estimated that the creation of a bridge between Rainham and Belvedere will increase the number of potential accessible jobs within Erith and Belvedere and the Rest of Bexley by 164,000 and 236,000 respectively. In comparison north of the river, the number of accessible jobs to London Riverside and the 'Rest of Havering' will increase by 47,000 and 32,000 respectively.

The River Crossings Development Study (2014, p.115) states that the *'new crossing will not provide the step change in connectivity [within Havering] that will occur on the south side of the River, where connectivity is already much poorer'*. The impact on land values is also considered to be much more significant south of the river with the new crossing likely to raise values and stimulate the conditions for the comprehensive redevelopment of underutilised land and industrial sites. In contrast, the relative impact on development in London Riverside and the Rest of Havering resulting from changes in connectivity was found to be low.

There is a significant contrast therefore, between the benefits for both LB Havering (north of the river) and LB Bexley (south of the river); with an emphasis on far greater benefits for the latter. The Belvedere bridge crossing is presented as an important catalyst for creating a step change in accessibility south of the river. This will help drive residential and employment growth. However, for LB Havering there are significantly less development impacts identified in regards to the quantum of residential units and industrial, office, retail and leisure floorspace estimated to come forwards as a result of a new crossing between Rainham and Belvedere compared with that estimated for LB Bexley.

3.2 Benefits for Local People

The current economic benefits of relevance to the LB Havering as outlined within the River Crossings Development Study are primarily based on the premise that improvements in connectivity impact upon the number of businesses, jobs, labour force and potential customers. This subsequently will raise land values and encourage developers to build to meet new demand as well as encourage businesses to locate within the area.

In turn these changes can be used as metrics to determine the attractiveness of each location to a range of uses which can then be used to inform the development of future development scenarios. The overall level of development potential therefore is directly attributed to improvements in road connectivity and the impact this has on access to jobs, the workforce, and customers. This approach is accepted as appropriate under the DfT WebTAG guidance however the benefits for local people must be placed within the appropriate socio-economic context.

The London Riverside BID socio-economic analysis report (2014) identified that in 2013 LB Havering had the lowest proportion of residents with a degree level qualification of any London borough. The borough also has 14% of residents without a qualification compared to 10% nationally and 26% of residents qualified to level 4 or above compared to 35% nationally. Whilst the River Crossings Development Study (2014) identifies the potential change in access to jobs as a result of the proposed bridge crossing, a key shortcoming of the current

evidence base is a consideration of the ability of LB Havering's residents to access these new jobs opportunities.

The proposal for a new river crossing will enhance transport connectivity within LB Havering and increase the number of jobs accessible for its residents. However, it is unclear how significant this benefit will be when placed within the context of low educational attainment and skill levels within LB Havering. Given existing skills and qualification levels amongst Havering residents, this makes it less likely that Havering's population will be equipped to compete for employment opportunities both locally and further afield. The extent to which these new accessible jobs provide viable new employment opportunities for local people within LB Havering therefore is likely to be limited.

Additionally, it should be emphasised that the increased accessibility of local residents to labour markets further afield as a result of the proposed bridge crossing, will not directly translate into a net benefit as it is likely that the majority of these jobs are currently filled. It is not apparent within the current evidence base that an analysis of job vacancies within the area has been undertaken. It is acknowledged that the River Crossing Development Study (2014) does take account of analysis based on the Business Survey (2014) data in regards to the percentage of businesses within the study area likely to be recruiting more staff as a result of improved river crossings.

3.3 Local Growth Aspirations

The proposed Belvedere bridge crossing may have direct implications for site specific growth aspirations for sites defined within LB Havering's Site Specific Allocations document (2008). This includes the Beam Park site (SSA11) and the Rainham West site (SSA12). Both sites have been identified as suitable for residential, community, recreation, retail and leisure uses. A new station and a new local centre are also envisaged at the Beam Park site. Both sites are located less than 300m from where the proposed bridge crossing connects to the A13 and it is likely that significant landscape and visual, noise and traffic⁹ adverse impacts could be felt at these locations which could have implications for the viability of these two sites particularly with regards to residential uses.

The London Riverside Opportunity Area Planning Framework commits to aspirations for significant residential development (25,000 new homes by 2031) within the Opportunity Area. The proposed bridge crossing could potentially place constraints on the borough's ability to meet its housing targets and its ability to deliver physical change away from industrial uses to mixed-use development on the above two sites if their viability is impacted by the river crossing.

In addition, LB Havering are currently in the process of submitting their application for a Housing Zone to be designated within the London Riverside Opportunity Area. A significant number of the key sites identified within the Housing Zone are located within the Beam Park and Rainham West site allocations as defined within the Site Specific Allocations Document (2008). The potential impact of the proposed Belvedere bridge crossing on the viability of residential development within these sites could therefore be detrimental to growth targets within the Housing Zone.

The proposed bridge crossing could also have direct implications on the London Riverside Opportunity Area in terms of adversely affecting employment growth. The current route shows the bridge crossing intersecting the eastern portion of the Opportunity Area and as a result the Beam Reach 6 site will experience direct land take. The collection of sites which constitute Beam Reach have been identified by the Mayor of London as the preferred location for investment by manufacturing companies based on their accessibility to transport infrastructure. The Beam Reach 6 site, which is currently being actively marketed by the GLA,

⁹ Proposals suggest the Bridge could carry up to 1,500-1,600 vehicles per hour in one direction at peak times.

has also recently benefited from EU funding to help remediate the site and has been identified as having capacity for 25,000sqm of industrial and warehousing space.

Conversely, there are areas within the Opportunity Area which are located further away and are unlikely to be directly affected by the new river crossing. Improved transport connections and accessibility to these areas could have a beneficial effect in terms of delivering residential and commercial development and unlocking previously isolated sites. The River Crossings Development Study (2014) indicates that with regards to development capacity the north side of the river has a significant oversupply of capacity when compared to estimated demand indicating that not all sites will come forward for development. A new river crossing between Rainham and Belvedere may therefore help improve the attractiveness of key sites for development and help to deliver them at a faster pace than under alternative scenarios.

The proposed crossing may have a beneficial impact on existing key industrial sites within the area including the Beam Park Business Park, Ferry Lane industrial estate and Rainham employment area for example. The Rainham employment area has been defined as an employment hub within the London Plan (2011). Any improvement in road connectivity through easier connections to the south of the river could therefore increase Havering's reputation as a strategic industrial hub within East London. However, the benefits of enhanced transport connectivity should be balanced with potential adverse impacts in terms of increased traffic congestion on the local road network (A13 and A1306).

3.4 Funding, Cost and Delivery

The proposed Belvedere bridge crossing is not currently specified within LBH's local planning policy nor is it currently safeguarded whilst land designated for new employment uses within the London Riverside OAPF will be subject to land take as a result of the current alignment, as specified above.

With regard to funding and cost, the current evidence base does not provide any significant detail on how the proposed Belvedere bridge crossing could be funded. Whilst the East London River Crossings Needs and Options report (2014) identifies a total cost of approximately £500-£900m a consideration of funding options has not been presented. It will be important for further clarity to be provided on the funding options which are currently being considered and whether the viability of current transport proposals in LB Havering may be affected given this could impact on growth aspirations within the Borough.

Proposals for a new station at Beam Park as well as the extension of the East London transit from Dagenham to Rainham are supported within Policy CP10 in the LB Havering Core Strategy (2008). This is part of the Council's aspiration to foster sustainable communities within the London Riverside area. The current River Crossings evidence base does not consider however the extent to which a new river crossing could be provided at the expense of existing transport infrastructure proposals and the impact this could have for growth aspirations within the Borough.

3.5 Business Survey Implications

The East London River Crossing Business Survey (2014) sampled 800 businesses across eight East London boroughs. Approximately 100 businesses were surveyed per borough and businesses of a large size were oversampled as well as those within the transport sector. Of those businesses surveyed in LB Havering, 5% were in the primary/manufacturing sector, 6% in construction, 27% in the Transport, Retail and Distribution sector and 62% in the services sector.

The survey found that businesses in Havering identified the main weaknesses of their current location to be poor parking facilities and congestion. However, within Bexley the most common weakness reported was remoteness from markets. In total almost half (47%) of businesses surveyed in Havering said river crossings were not important to successful business operations (the 2nd highest of any of the boroughs surveyed) compared to 33% of businesses

in Bexley. Furthermore, only 25% of respondents within Havering stated that the river was a barrier to development across the other side compared to 40% in Bexley.

This survey demonstrates the differences in business perceptions to the new river crossings proposals within both Havering and Bexley and indicates that businesses within Bexley appear to have a greater need for a new crossing compared to those in Havering. The study also suggests that those businesses surveyed within LB Havering do not place much significance on a new river crossing to their continued operations and future growth.

4 CONCLUSIONS AND SUMMARY

This report has summarised the findings on the Belvedere bridge proposals from the current TfL evidence base underpinning the new East London River Crossings programme consultation. It has provided a critical analysis of the current evidence base supporting the Belvedere bridge proposal with consideration of the potential economic benefits for LB Havering and LB Bexley and conclusions for further consideration.

In broad terms this note highlights that the Belvedere bridge proposal could generate fairly limited economic benefits for LB Havering with regard to increases in development potential resulting from increased accessibility to jobs, access to markets and businesses and economically active populations. All other options, including the Gallions Reach Bridge proposal were assessed as generating no positive economic benefits for the LB Havering. This is in stark contrast to Belvedere and Erith on the south side of the river which would experience significant beneficial effects as a result of both the Belvedere bridge and the Gallions Reach bridge options.

In critique of the current evidence base, this report concludes that there are some important considerations for LB Havering when considering their response to this consultation. There is currently a lack of clarity in how reported economic impacts will benefit local populations within LB Havering. This includes the degree to which increased access to job markets will benefit local people given a potential skills gap. In addition, very little consideration has been given to the potential adverse impact which a new bridge crossing alignment in this location could have on the LB Havering's and the GLA's growth aspirations for the London Riverside Opportunity area. There could be significant adverse environmental effects on sites within proximity of this proposed river crossing which could significantly affect their viability as well as the regeneration targets and growth aspirations for area. In addition the Beam Reach 6 site would be directly impacted through land take as a result of the bridge alignment under Scenario 6.

There is also limited detail with regard to the funding and delivery of this proposed bridge option. The Belvedere river crossing is not currently explicitly supported in local or regional planning policy and the land under the proposed alignment is not currently safeguarded. Furthermore, there is a lack of clarity with regard to the funding of this option, and in particular the potential trade-offs with current transport proposals within the LB Havering. This could have direct implications for local plans and growth aspirations within both the Opportunity Area and the Borough as a whole.

In summary, whilst the strategic case for a new river crossing in East London is recognised, the current evidence base supporting the option for a new crossing between Belvedere and Rainham does not appear to demonstrate that there would be significant economic benefits for LB Havering. This report pulls out key considerations which should be examined in the Council's response to the TfL East London River Crossings consultation. In particular, the effects of this proposal on the London Riverside Opportunity Area should be examined, ensuring that any trade-offs between a new river crossing and current transport proposals are considered in more detail as well as ensuring that this proposal integrates with the wider regeneration priorities for the area.

