



**Jubilee Line Extension
Development Impact Study 2003**

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Maps and Photos included in Appendix (section 8):

Millenium Quarter

Maps showing LDMS areas and planning applications

Maps showing case study locations in station catchment areas

Photos

1 *Introduction and Summary*

1.1 *Study context*

- 1.1.1 This study was commissioned by Transport for London (TfL) through the Jubilee Line Impact Study Unit (JLEISU) at the University of Westminster Transport Studies Group. It forms part of a suite of studies to assess the impact of the JLE.
- 1.1.2 This report is the result of work undertaken in late 2001 and early 2002 by Tim Pharoah, and provides an updated analysis building on the First Development Activity Study (1998), together with new analysis of a broader character based on the range of evidence examined.

1.2 *Structure of the report*

- 1.2.1 Following this introduction, the report is organised in five sections:
- Section 2 provides a discussion of other studies and reports and draws out their relevance to the present study, particular with regard to methodological issues;
 - Section 3 reviews the changing planning policy context, which may be expected to have influenced planning policy locally, and in relation to the JLE;
 - Section 4 describes how borough planning policies have changed in the JLE corridor, and how these changes have affected the pattern of development demand. Issues arising from this analysis which informed other aspects of the study are also discussed;
 - Section 5 deals with an update of development demand and activity using the London Development Monitoring System database (LDMS). The period covered is 1991-2000;
 - Section 6 provides an update of the 40 case studies sites included in the First Development Activity Study. In addition there is commentary on a number of additional sites where this assists understanding of changes in development demand or activity.
 - Section 7 provides the main analysis, which draws together the range of evidence discussed in subsequent sections. This analysis includes the main hypotheses and the main conclusions, and pays particular attention to geographical distribution and variation of development change;
 - Section 8 is an Annex containing Maps and Photos.

1.3 *Scope of main findings*

- 1.3.1 The impact of the JLE on development over the past ten years is explored throughout the report. The broad analysis is provided in the following chapters which explains changes that have occurred in development, how they compare with changes elsewhere, and to what extent the changes are related to or are attributable to the JLE.
- 1.3.2 This analysis looks at the JLE as a whole, and also by different areas. It shows how the impacts vary considerably according to accessibility, development history, and planning policies and decisions. Particular attention is paid to the issue of catchment size, and its relevance according to different types of development.
- 1.3.3 Data analysis of development applications provides not only an insight into development activity in the JLE corridor compared to other areas, but also highlights fluctuations in the local and wider property markets that need to be taken into consideration when analysing the role of the JLE.
- 1.3.4 The difficulties of attributing any particular changes to the JLE are acknowledged, and in response the analysis attempts to build up a picture using a number of different indicators. If most indicators point in a certain direction, even if individually they are somewhat vague or tenuous, this helps to draw more robust conclusions.
- 1.3.5 During the course of the study, private developer contributions towards the cost of transport infrastructure was clearly important as a policy issue at borough level, and at many of the case study sites. The study notes (section 2) that the typically low level of contribution reflects diverse land ownership and the difficulty for local authorities in recovering betterment, rather than the absence of betterment.
- 1.3.6 A further issue is whether any particular impact can be described as “positive” or “negative”. This study broadly assumes that increased development activity is a positive impact. But it is acknowledged that in some respects development of certain kinds in certain places is not universally welcomed. Two cases in particular stand out from the research undertaken.
 - 1 Canary Wharf – the original Enterprise Zone and subsequent LDDC development was widely criticised, especially for its perceived failure to address the concerns of existing communities in the Docklands area. There were other criticisms

too, such as poor design and lack of facilities. All of this has led the east London boroughs to be explicit about their aim of avoiding Canary Wharf-style regeneration in future;

- 2 The Millennium Dome – while there is no doubt that the Dome would not have been built at North Greenwich without the JLE, there is controversy over whether this was a benefit or a liability. Plans for development of the Dome and the area around it may well produce a return for the Government under an agreed “deferred payment” scheme negotiated with the development consortium. But it may also be argued that development could have gone ahead in the area sooner without the Dome, and perhaps at lower cost to the public purse.

1.3.7 The overall conclusions and analysis are presented in section 7 with a high degree of confidence based on the evidence examined. Exceptions or results which appear to counter the main thrust of the argument are commented on so that the reader may be able to judge their importance.

1.3.8 A study such as this is inevitably constrained by the availability and quality of data. While the evidence examined is considered sufficient to arrive at the overall conclusions provided, there are a number of qualifications and assumptions at various places in the text. The aim has been to make clear any doubts or ambiguities without allowing the finer detail to interfere with presentation of the main messages. This should be borne in mind particularly in reading section 7 where the overriding aim is to present as clear a picture as possible of the development impact of the JLE.

1.4 *Summary of findings*

1.4.1 The study found a considerable amount of development change within the JLE catchment areas during the period following the authorisation of the JLE. The JLE has been established as a significant factor in the causation of this development activity. Not surprisingly, there are a number of methodological issues which require some qualification of the results, but these do not detract from the significance of the overall conclusion

1.4.2 The JLE has both prompted and supported development at densities higher than could have been achieved without, and this is true particularly of commercial development on the Isle of Dogs. The JLE

has also enabled development that otherwise would not have occurred, with the Millennium Dome being a prime example.

- 1.4.3 The development impact of the JLE has, at this stage, varied as between the different stations along the route. The most obvious and positive effect has been the commercial development at Canary Wharf. Perhaps less dramatic, but nevertheless real impacts have been seen with riverside residential and other developments at, for example, Bermondsey and Canada Water. Development has been strong in the post-JLE period in areas served by the JLE, but which already had very good public transport accessibility. At these stations, including Waterloo, London Bridge and Stratford, the JLE effect must be regarded as adding further depth and breadth to the available accessibility, and thus contributing to the overall attraction for property investors and developers.
- 1.4.4 There remains a great deal of development potential around the JLE stations, especially those at Canada Water, North Greenwich, Canning Town and West Ham. The impact of the JLE has already been noticeable in terms of substantially revised planning and regeneration strategies for these areas which aim to maximise the potential offered by the JLE for public transport use. It is anticipated that over the coming years this potential will be realised, and, as noted in the analysis, there are already signs that this will happen.
- 1.4.5 A further conclusion is that the development that has occurred and will occur follows a pattern that in most cases follows the model of “public transport oriented development”, which may briefly be described as having lower parking provision, offering lower dependence on the car, and instead providing high levels of access by public transport. As noted above, much potential for such development remains, and the local authorities concerned have incorporated policies in their revised plans to ensure that this happens.
- 1.4.6 Overall, the message from the study is a positive one, with the JLE being found to have produced positive development impacts, with these impacts varying between the different areas along the route. The considerable potential for further high density and high quality places around some of the stations seems likely to be strongly promoted, thanks to the significant revisions to the plans of the local authorities concerned.

2 *Review of Literature*

2.1 *Introduction*

2.1.1 This section takes a second look at the literature and research associated with the development impact of new rail or fixed track transport infrastructure. The purpose is to establish whether studies of other systems have found evidence of development impact that can be attributed to new transport infrastructure, and if so whether this evidence reflects the evidence related to the JLE. A second purpose is to consider the methods used in other studies and to see whether and in what ways these can inform the methods used in the present study.

2.1.2 This review follows on from that undertaken as part of the first development activity study. Five studies were reviewed in the first study in 1998, namely:

- ***Metropolitan Atlanta Rapid Transit Authority.*** The main reference used was Nelson, A & Sanchez, T, 1997, “The Influence of MARTA on Population and Employment Location, in Transportation Research Board.” (MARTA stands for Metropolitan Atlanta Rapid Transit Authority.) Also used was Moon, H “Land Use Around Suburban Transit Stations” 1990, in Transportation Vol. 17 No. 67-68.
- ***Bay Area Rapid Transit Authority, San Francisco.*** The main reference was: Cervero, R & Landis, J, 1995, “*BART at 20: Land Use Impact*”, in Transportation Research Board proceedings. Also used was Cervero, R 1989, *America’s suburban centres; the land-use transportation link*, Unwin Hyman, London.
- ***Tyne and Wear Metro.*** The main reference was Tyne and Wear PTE (1985), *The Metro Report*. Newcastle. Also used were: Pickett, M, and Perrett, K, 1984, *The Effect of the Tyne and Wear Metro on Residential Property Values*, Transport and Road Research Laboratory, report SR 825, Cowthorne, Berks; and Miles, J. C, Mitchell, C and Perrett, K “*Monitoring the Effects of the Tyne and Wear Metro*” 1981, TRRL, DoE, DoT.
- ***Glasgow rail improvements.*** The main reference used was: Wicks, J, Gentleman, H, Walmsley, D A , and Mitchell, C G B, 1982, “The Glasgow Rail Impact Study - A Study of the Impact of Investment in the Argyle Line and Glasgow Underground” (Final Report), Transport and Road Research Laboratory report SR650, Crowthorne, Berks.
- ***South Yorkshire Supertram.*** The main reference was Haywood, R, 1998, *South Yorkshire Supertram: Final Report on Planning Applications and Land Use Change Research*”, University Centre

Llewelyn-Davies

for Regional Economic and Social Research, Sheffield Hallam University. (A later Haywood article is referred to in the update discussion below.)

- 2.1.3 This review takes a critical look at the relevance of these other studies to the JLE, and in addition looks at some literature that has become available since the baseline study. Other places looked at, albeit in less detail, are Manchester, Portland (Oregon), San Jose, Toronto, Vancouver and Washington DC (see Table 2.1). Regarding the additional literature, the present author is not aware of any further studies of particular new rail systems, apart from some additional analysis of the South Yorkshire Supertram. It should be noted that the Croydon Tramlink Impact Study was not published at the time of this review. The supplementary literature is either of a theoretical nature, or mentions specific rail systems only by way of example.
- 2.1.4 The overall conclusion is that other studies have little relevance to the JLE because they examine systems in wholly different urban contexts. There are no studies of which the author is aware of the impact of major new underground railways in a major metropolitan area comparable to London. This point is discussed further below. What other studies do contribute, however, is useful insights into the methodology of assessing development impact, and this also is discussed below.

2.2 *Studies of new rail systems*

- 2.2.1 The impact of new rail systems will not, as sometimes implied, be uniform between different systems. Their impact will depend upon a range of variables, and the following are put forward as being of particular importance.

- 1 ***Size of the city.*** Many studies especially from Europe confirm that the share of public transport trips increases with city size and decreases with distance of homes from the centre. Development impact associated with public transport accessibility is therefore also likely to be lower in small compared to large cities.¹

¹ Transport Research Laboratory et al, 1999, "Integration of Transport, and Land Use Planning, Deliverable D2a, Land-Use Transport Interaction: State of the Art", Institute of Spatial Planning, University of Dortmund, for European Commission.

- 2 ***Size and intensity of the area served by the new line.*** The JLE serves an area in which more than one million people are employed, and which acts as a highly specialised service and cultural centre for an area with a population well in excess of 10 million people. The pulling power of central London is immense, and this cannot be matched except by a very small number of world cities such as New York and Tokyo.
- 3 ***Extent of opportunities for car accessibility.*** This is related to the above points. Opportunities for car use to central London are restricted both by lack of supply of roads and parking (in relation to potential demand) and for many people also by price. Also, parking is restricted in most of the intermediate locations of the JLE, which limits the choice of mode even for non-central trips. Such restriction is rarely found in smaller cities, especially in Britain and North America.
- 4 ***Critical mass of public transport.*** The role of an individual rail service in an area that is otherwise served by car may be quite different from that of a service that forms part of a comprehensive network, as is the case of the JLE.
- 5 ***Means of access to public transport.*** Some rail stations, especially in the USA, are seen as facilities that you drive to. This is quite different from rail stations in London where parking for “railheading” is restricted as a matter of deliberate policy, and has been so for more than three decades. For example, the Bay Area Rapid Transit system in the San Francisco area links downtown to widely dispersed low density areas. Access to most of the stations is almost exclusively by car, and to a lesser extent bus. By contrast, most access to the JLE (and other Underground stations) is directly on foot.
- 6 ***Image and integration.*** The JLE is part of a system that is well-known worldwide, and that is ingrained in the London culture. Moreover, the JLE and other Underground services are supplemented by other major public transport systems (surface rail, bus and light rail) which, unlike those in provincial cities,

Pharoah, T and Apel, D, 1995, “Transport Concepts in European Cities”, Avebury, Aldershot.

are to a large extent jointly planned and marketed within a unified fare structure. The entrance to a JLE station is therefore also the entrance to a vast network of public transport services throughout London and beyond.

- 7 ***General state of the local economy and property market.*** Providing rail infrastructure in a declining area is quite different from putting it into an area which is growing fast or where there is pressure on land, or where the market is strong enough that developers will negotiate layout, parking provision, density, quality and other aspects to fit with the rail access agenda.
- 8 ***The availability of non-transit development options in neighbouring or competing areas of development.*** Developers may wish to avoid the low car parking, high design requirements of locations near to rail stations, by locating instead where ample parking is allowed and where little is asked in terms of financial contributions (to rail or other infrastructure).

2.2.2 Table 2.1 compares the attributes of the JLE in respect of the above variables to the attributes of other systems that have figured in other studies.

2.3 ***Relevance of other research to the JLE***

2.3.1 The ideal situation would be where studies of other systems provide clear evidence of development impact, enabling comparisons to be drawn with the impacts discovered within the JLE corridor. Given the above considerations we may conclude that the literature does not allow such comparisons to be made. The way around this would be if studies of new lines in world cities comparable to London such as New York or Tokyo were available. Regrettably the author has been unable to trace any such studies.

2.3.2 One issue in particular is difficult to resolve. The studies of “lesser” systems in “lesser” cities suggest that positive impacts on development are either small, ambiguous or requiring market interventions to make them appear. Does this mean that rail-led development plans in such cities are ill advised? Do the positive impacts found in the JLE corridor

suggest that rail construction is only really a positive feature in the major cities, where the criteria identified are met? There are certainly published supporters of this view, as discussed below.

- 2.3.3 An alternative viewpoint is that cities whose rail systems are limited can pursue a vision of the future in which the public transport network is much more highly developed, and in which public transport plays a much bigger role in the life of the city than it does at present. In this way new lines may not produce significant shifts in travel or development patterns in the short or medium term, but they can be seen as “laying the necessary tracks” for a public transport city in the long term. In other words smaller cities can plan for outcomes that gradually become more like those of London and the other major cities.
- 2.3.4 Other literature points to evidence that higher levels of public transport use are associated with certain development density thresholds. This may in turn be related to the public transport network reaching a critical mass only when certain density thresholds are reached.
- 2.3.5 The conclusion of this section is that the available literature on the development impact of rail systems is of little relevance in understanding the development impact of the JLE. Nevertheless, the findings of other studies are briefly discussed below.

Table 2.1 Attributes of different rail systems compared to JLE

Comparable attributes are show with Yes entry. Places not comparable are shown with an X entry

System	City Size	Centre size	Car alternative at centre	Critical mass of public transport	Heavy Rail with high speed and capacity	Means of access to public transport	Image and integration	General state of the local economy and property market at time of studies	The availability of non-transit development options in neighbouring or competing areas of development.
Atlanta	X	X	X	X	X	X	X	Yes	X
BART	X	X	Yes	X	Yes	X	Yes	Yes	X
Croydon	Yes	X	X	Yes	X	Yes	Yes	Yes	Yes
Glasgow	X	X	X	Yes	Yes	Yes	X	X	X
Manchester	X	X	X	Yes	X	Yes	X	X	X
Portland	X	X	X	X	X	X	X	Yes	X
San Jose	X	X	X	X	X	X	X	Yes	X
Sheffield	X	X	X	X	X	Yes	X	X	X
Toronto	X	X	X	X	Yes	Yes	Yes	Yes	X
Tyne and Wear	X	X	X	X	X	Yes	Yes*	X	X
Vancouver	X	X	X	X	X	Partly	Yes	Yes	X
Washington DC	X	X	X	X	Yes	Partly	X	Yes	X

* Formerly, prior to bus deregulation, the Tyne and Wear system was integrated with local buses.

1.1 *Literature on development impact of rail systems*

1.1.1 A useful starting point is a paper produced by London Transport Planning¹ around the time of the JLE authorisation. The main development benefits were seen as being on the North Greenwich peninsular (where a 500 space Park-and-Ride facility was envisaged) and on the Isle of Dogs, where the JLE together with the DLR was seen as enabling the employment capacity of the island to grow from 60,000 to 100,000, and for the mode share of work journeys by public transport to grow from 40% to 80%. Of course no mention was made of the Millennium Dome or the Tate Modern, or other features in the corridor that emerged post-authorisation.

1.1.2 *Planning intervention*

1.1.3 A feature of the studies of smaller cities that we have viewed is the finding, or acknowledgement, that planning intervention is required if development is to concentrate within public transport catchment areas. The converse of this is that the increase in public transport accessibility is not of itself sufficient to prompt additional or significant development activity. This is mentioned in relation to a study of the Ottawa (Canada) segregated busway system². It suggested that property investment at busway (Transitway) stations was almost four times the investment in the Transitway itself. However, in order to achieve the mode share targets for the journey to work it was estimated that 40% of all jobs in the region would need to be located at the Transitway stations. This in turn would require “a strong commitment at both regional and local level to land use policies that ensure that the majority of new jobs occur at Transitway stations.” It may be noted that Ottawa has high transit use by north American standards, for example a per-capita ridership similar to that of Boston (Mass) which has a major tram system, and twice that of Vancouver or Calgary.

1.1.4 A number of studies also refer to the planning and taxation mechanisms that have been put in place to achieve what is commonly referred to as “transit oriented development” (TOD). This usually consists of higher density, mixed use development with requirement of high quality and pedestrian-friendly design, and lower than normal levels of parking provision. These provisions relate to areas within half a mile or 400-500 metres of a rail stop and include higher density allowances, tax

¹ London Transport Planning, October 1993, “Benefits of the Jubilee Line Extension: A Summary”.

² Ottawa-Carlton Regional Transit Commission, 1992, “A Rapid Transit Strategy into the Next Century.”

“holidays” or reduced property taxation. It is not necessary here to provide details of all the measures and studies. A good source for such detail is a study by Parsons Brinkerhoff et al produced for the Transportation Research Board (USA).³ This included case studies of station area development in the following cities:

- Houston (Texas)
- Washington DC
- Portland (Oregon)
- Vancouver BC (Canada)
- Ottawa-Carlton (Canada)
- Curitiba (Brazil)

1.1.5 From these cases, the study concluded that a variety of tools are required to focus development growth around stations. These provide a useful benchmark against which to assess the mechanisms for station area development when new lines are planned. The table below therefore provides a judgement of the JLE context against the Parsons Brinkerhoff criteria.

1.1.6 We may conclude from the table that the JLE is well supported by planning and implementation mechanisms in order to produce development impacts that are well related to public transport use. The only principles that are less clearly met are to do with competing provision for travel and access by car, namely the provision of roads and parking. In the policy section of this report there is further discussion of this issue.

³ Parsons Brinkerhoff Quade and Douglas, (1996), “Transit and Urban Form”, Transit Cooperative Research Program, Project H-1, for Transportation Research Board, USA.

Table 2.2 The JLE judged against selected criteria for public transport-related development

PARSONS BRINKERHOFF CRITERIA	DOES THE JLE CONTEXT MEET THE CRITERIA?
Regional tools	
Limiting the urban area, with urban growth boundaries, Green Belts etc.	Yes.
Locating major activity centres near transit.	Yes, in terms of planning framework and policy.
Transit-friendly subdivision (land use) guidelines that put all homes within walking distance of transit.	Yes, though transit in London context includes bus as well as rail. Not all homes in London are planned to be within walking distance of rail stations.
Limited major road construction.	Debatable.
Station Area Tools	
Innovative zoning, including density bonuses, “up-zoning”, and transfer of development rights in station areas.	Higher densities and mixed use developed planned around JLE stations.
Site design guidelines that show how development can be more transit friendly.	No (though guidelines may be forthcoming for individual station catchments, e.g. Canada Water).
Parking management that limits the supply of parking and regulates its location in downtown and station areas.	Yes, but parking less well controlled in competing areas, thus allowing developers the alternative of locating elsewhere to achieve higher parking levels.
Siting public facilities such as agency headquarters and convention centres near stations.	No, though if JLE impact is not reliant on public sector investment, this can be regarded as a positive factor.
Using redevelopment agencies with innovative financing, land assembly, and other development tools to support private development in station areas.	Yes, various regeneration funds, agencies and partnerships. Provision of tax holidays, eg exemption from the payment of rates in areas controlled by the London Docklands Development Corporation.
Building subsidised housing near stations.	Yes, although affordable housing requirements tend to apply to all sites, not just sites close to stations.
Integrating feeder bus services with high capacity transit.	Yes, bus, heavy rail and DLR at certain JLE stations

- 1.1.7 An important issue that emerges from the range of literature on station area development concerns whether planning intervention is designed to *require* or *allow* or *encourage* developers to do certain things. In Toronto for example, developers were allowed to build at higher densities at subway (metro) stops than were normally allowed elsewhere. In the context of strong pressures for development at a time of city growth developers saw this as a bonus, and thus were encouraged to develop near stations. In other cities intervention has followed more the concept of *requiring* certain development attributes near stations in order to produce development patterns that support the use of transit. Where development pressures are strong, or where development opportunities in other locations are restricted, such requirements can work. However, developers may resist the parking, design and other restrictions if they do not perceive them as helping the marketability of their schemes. In Portland, for example, the author interviewed a developer who had deliberately chosen a development site more than 500 metres from a light rail stop in order to avoid the station area planning requirements.⁴
- 1.1.8 In the JLE context, there are locations where high densities are sought by developers (e.g. Canary Wharf), but at other locations the boroughs are attempting to encourage higher densities near the stations or, to the extent that the development market will bear. This issue is discussed further in the policy section.
- 1.1.9 *Scepticism and doubts*
- 1.1.10 There is a growing literature that may be characterised as a backlash against the principles of transit oriented development. This has arisen mostly in the north American context (where somewhat ironically the concept of transit development has been most vigorously promoted) where rail systems have been developed in low density car-dependent cities. Porter⁵ expresses his reservations in the following way:

“Planners’ expectations for the clustering effects of rail transit should be tempered by the continuing realities of the development marketplace, the limits of public regulatory intervention in the market, and the nature of most new rail systems in the United States. Achieving transit-related development will not be an easy job.”

⁴ Apel, D, Lehmbruck, M, Thiemann-Linden, J, and Pharoah, T (1997), “Kompact, mobil, urban: Stadtentwicklungskonzepte zur Verkehrsvermeidung im internationalen Vergleich”, Deutsches Institut für Urbanistik, for German Environment Agency (Umweltbundesamt), Berlin, 1997. (Case studies from UK and USA in English)

⁵ www.asu.edu/caed/proceedings97/porter.html

Porter seeks to distinguish those cities that have achieved a measure of success due partly to the initiation of rail projects at times of rapid economic growth (1960s and 1970s) and partly to pro-active public policy support for transit-related development. He cites Toronto, San Francisco and Washington DC as examples. On the other hand, systems that were planned later have neither been able to generate significant development pressures, nor to provoke local authorities into adopting strong support for transit-related development at stations. He claims that many of the recent rail-related development projects are supported by significant public subsidies or consist primarily of public facilities. In other words, they are not a product of enthusiasm in the private development market.⁶

- 1.1.11 Porter also raises another important issue to do with the type of rail system. He argues that the cities (quoted above) with the greatest success in promoting transit-oriented development have done so with investment in intensive heavy-rail systems. He argues that the more recent light rail systems cannot deliver the speed or capacity of heavy rail, and thus cannot generate the same interest from developers seeking sites that have rapid links to a metropolitan core. He concludes that “promotion of station-area development along light rail systems promises a smaller bang for the buck”. This may go some way to illuminating the debate about the effect of new rail systems on land or rental values (see section on developer contributions below).
- 1.1.12 This is important when considering the relevance of light rail impact studies to the JLE. If Porter is right, then the somewhat negative conclusions from the studies of light rail systems (in terms of development impact that is) can be discounted.
- 1.1.13 An example of more vociferous and polemical reaction against the development of rail systems comes from Staley and Cox⁷. They say the relationship between rail investment and economic development is not nearly as direct as rail advocates claim. In the two cases dealt with in their article (Columbus, Ohio and Portland, Oregon) they claim “development along both transit lines has not occurred spontaneously: most projects require steep public subsidies. The City of Portland has even been relegated to granting 10-year tax abatements for any new development within walking distance of a rail station”. It should be noted that their arguments and examples are in the context of light rail systems in sprawling, car dependent cities. Lack of positive development

⁶ Such projects are described in Bernick, M and Cervero, R, 1996, “Transit Villages in the 21st Century”, McGraw Hill.

⁷ Satley, S and Cox, W, 2001, “Rail Transit unlikely to Stimulate Urban Redevelopment”, note from The Buckeye Institute, Columbus, Ohio.

http://www.buckeyeinstitute.org/perspect/2000_7Persp.htm.

impact in these circumstances, even if it is as they say, does not lead one to expect similar findings in different contexts such as the JLE corridor. What it does do is emphasise the importance of understanding the context of schemes and studies of them when attempting to draw comparisons between one place and another.

1.1.14 *Objectives of rail systems*

1.1.15 Regeneration, urban growth, social inclusion environmental improvements or meeting transport demand? These are some of the possible objectives of new urban rail services. It is a feature of many rail scheme proposals that objectives are couched in vague terms, and appear to be contrived to meet funding or political criteria rather than empirical analysis of problems and opportunities. The JLE was clearly routed to fit in with a regeneration agenda, but even so included a substantial element of meeting transport demand.

1.1.16 Allport (1993)⁸ points out that many cities pursuing new public transport systems in the early 1990s had an interest in the potential to create an environment and form of development and quality of life commensurate with their aspirations, as much as with carrying existing passengers more efficiently. This implies a belief in the ability of new rail systems to attract or at least support a pattern of development that is significantly different from that occurring in the absence of major public transport facilities. The author's own research suggests that such objectives are usually expressed only in very general terms, and are rarely supported by objective analysis.⁹ Moreover, impact studies undertaken in relation to Manchester Metrolink, South Yorkshire Supertram and Tyne and Wear Metro have found little evidence of development pressures changing to produce public transport-related development patterns. However, in some cases a substantial length of time may pass before development activity occurs as a result of a scheme as demonstrated by the DLR extension to Beckton.

1.1.17 The possibility must be allowed that stated objectives of rail schemes have a political or pragmatic dimension. From the early 1980s onwards, 100% public funding of rail systems became a thing of the past, the Tyne and Wear Metro was the last example of this full funding. Government grant became available (if at all) only in lieu of identified non-user benefits of new public transport facilities. These non-user benefits include reduced road congestion and accidents and reduced environmental impacts of road traffic. An additional non-user benefit that entered the arena was "urban regeneration" or "local economic

⁸ Allport, R. J. (1993). Urban Development and Transport - Achieving Urban Objectives through Transport Action. In City Trans Asia '93 Conference, Singapore.

⁹ DTLR (forthcoming), "Planning and Sustainable Access".

development” or “social inclusion” benefits. Such objectives have been included in scheme justifications with the (unstated) purpose of attracting higher levels of grant.

- 1.1.18 Regeneration objectives are now often given prominence in the reasons for scheme promotion, and the JLE is certainly no exception. The regeneration of the Isle of Dogs was the initial focus, but other areas have picked up on the theme, as discussed in the policy section of this report. Newham is fairly explicit about its wish to avoid regeneration in the style associated with Isle of Dogs, which is associated with development that is of little benefit to local residents or in reducing local unemployment.
- 1.1.19 Regeneration opportunities depend on the availability of sites appropriate for development or redevelopment. The JLE final route was chosen largely on the basis of such opportunities. Not all new rail lines are routed on this basis, however. Consequently, it is perhaps unreasonable to look for a major development response to the Bury and Altrincham lines of the Manchester Metrolink, or the north-south alignment of the South Yorkshire Supertram, when the routes chosen are mostly through stable and already built-out suburbs. For the same reason the Victoria Line, which on the face of it might appear to offer a close comparison with the JLE, in fact was built with a very different objective of serving an existing rail demand more efficiently rather than opening up development opportunities. Of more relevance are rail schemes built through derelict or other areas where development is desired, such as the BART system or Vancouver’s Skytrain, or the line linking the new town of Joondalup to Perth (Western Australia). Unfortunately the few studies available of these lines do not highlight these important contextual factors.
- 1.1.20 A related issue that has arisen in some circumstances is the potential for *negative* development impacts to occur. An example is in Zürich when the S-Bahn railway through the centre of the city was opened. Increased accessibility led to increased development pressures for employment activity as well as up-market residential housing. Development of this nature was at the expense of small businesses, that could not afford the higher rents or re-location to new buildings, provoking protests and eventually City Council action to attempt to protect their interests.¹⁰
- 1.1.21 In the JLE context, similar concerns have arisen especially in the Bermondsey station catchment area, where established residents feared

¹⁰ Author’s interview with Reudi Ott, Chief Planning Officer, Zürich City Council, 1998.

that the area would increasingly be taken over for up-market residential development, at the expense of the supply of affordable housing.¹¹

1.2 *Methodological issues from other studies and literature*

1.2.1 *Catchments*

1.2.2 Allport et al address the issue of catchment size in their paper reviewing the prospects for new public transport systems being considered in 40 British cities at the time.¹² They argue that accessibility gains will influence different land uses in different ways. For retail the effect would be significant only very close to the stations. For offices the effect would decline very quickly with distance from the station, and would be negligible at 500 metres at most.

1.2.3 Pharoah has argued that for residential development, the accessibility benefits can stretch much further, with walking distances from the station up to a kilometre being acceptable if the rail station gives access to a powerful attraction such as central London. Catchments for individuals seeking accessibility to central London can stretch further still if feeder buses, light rail, connections with other Tube lines or cycle options are included. Such wider catchments may be harder to detect in property prices or marketing priorities if other local factors are perceived to be stronger (i.e. if access to the station is simply one of a number of attractions, rather than the main one).

1.2.4 The Sedway Group¹³ undertook a study of residential property prices around BART stations in the San Francisco Bay Area. Their findings were presented in terms of *miles* from the stations. The significance of this is that it confirms the point already discussed that in the north American context, suburban stations are regarded as facilities that you drive to. The station catchments on the BART system are vast compared to those on the JLE. BART serves a large region of mostly low-density suburbs where BART is the only major public transport service. The JLE by contrast is simply part of a dense network within a densely developed inner metropolitan region. Driving to the stations is neither necessary nor (for the most part) feasible. The walking catchment areas of the JLE either adjoin or overlap with the walking catchment areas of other major public transport services, (e.g. London Bridge) or are supplemented by feeder public transport services (e.g North Greenwich).

¹¹ Llewelyn-Davies et al for L. B. Southwark, 2000, "Regenerating Bermondsey Spa, Draft Masterplan".

¹² Allport, R.J, Conway, J.K, Evans, R.C, (June 1991) "The Influence of Public Transport Policy on Urban Development", PTRC.

¹³ Sedway Group, 1999, "Regional Impact Study – BART".

1.2.5 A conclusion from this is that the catchments identified in the JLE baseline study can be regarded as “maximum” catchments. They reflect the residential catchment criteria, but are in many places too wide for retail, office, hotel or leisure uses. In the case of the catchments for Canary Water, Canary Wharf, North Greenwich and Canning Town, the defined catchments depend on feeder public transport services to be justified, and are not appropriate for analysis of non-residential development impacts. As a consequence the analysis (section 7) relates development impacts to “outer” catchments, as in the baseline study, and “inner” catchments that are more appropriate to non-residential development.

1.2.6 *Developer contributions*

1.2.7 There are essentially three sources of public transport funding in Britain: fares (users are expected to pay through the farebox for the benefits they receive); government grants in lieu of benefits to non-users; and the private sector. The latter may include private sector transport investors, but also property developer contributions reflecting betterment conferred by the new facility.

1.2.8 Allport et al argue that three circumstances are needed in order to achieve private sector developer contributions towards the cost of new transport infrastructure:

- Suitable potential site uses;
- A major change in accessibility (as perceived by the developer);
- Planning policies which permit betterment.

1.2.9 They note that developer contributions rarely exceed 15% of the total transport investment, and the only example at that level was the Canary Wharf development contribution to the Bank extension of the DLR. But they argue that the low level of contribution reflects diverse land ownership and the difficulty of recovering betterment (poor negotiating position of local authorities) rather than the absence of betterment.

1.2.10 Recently there has been renewed debate¹⁴ on the feasibility and desirability of funding new public transport from rises in land values (betterment). Riley¹⁵ for example argues that annual land rental values near to JLE stations have risen by £1.3 billion, and that 25% of that value would pay off the £3.5 billion capital cost of the line in 20 years.

¹⁴ There have been attempts over the past 50 years or so to recover some or all of the betterment generated by public projects (including transport), notably in 1947 and 1973.

¹⁵ Riley, D (2001), “Taken for a Ride: Trains, Taxpayers and the Treasury”, Centre for Land Policy Studies

He also quotes Rybeck¹⁶ who similarly argued that the Washington DC Metro system cost \$9.5 billion but created new land values of \$10-15 billion.

- 1.2.11 Higginson¹⁷ has also reviewed the prospect of funding from developments and cites the case of Copenhagen where funding for a new Metro line to new suburban areas is coming from the collection of a higher property tax based on higher resultant land values.
- 1.2.12 A further review of different studies is published on the world-wide-web by Smith, J.¹⁸ The studies he covers relate to the following cities: Atlanta, Chicago, Dallas (DART), Denver, Miami, Milan (Metro), San Francisco, St Louis, Toronto, Washington DC (Metro).
- 1.2.13 The complexity of the subject, and the ambiguity of research findings over several decades is highlighted by Ryan¹⁹, who reviews rail transport and property values. He argues that some of the research discrepancies can be explained by different methodologies, and in particular whether accessibility is measured by distance or by time. He argues that better understanding of the methodological issues is necessary to improve the ability to anticipate land-market responses to transportation facilities. In particular he argues that measuring accessibility by time yields more consistent results than measuring by distance.
- 1.2.14 Smith (*op cit*) provides a recent review of literature on the extent to which public transport raises site values around its stops. He cites five studies that found “more than enough rent” (including Riley *op cit*), and 33 studies that found rent rises but did not calculate the aggregate, or compare generated values with system costs. A briefing note from the American Public Transportation Association²⁰ cites several studies or articles that claim a positive effect of both light and heavy rail systems on property values. The cities included were Atlanta, Dallas, Chicago, Boston, San Francisco, and Washington DC.

1.2.15 ***Context of car restraint***

¹⁶ Rybeck, W, 1981, “MetroRail Impacts on Washington Area Land Values”, Walter Rybeck for the Subcommittee on the City, Committee on Banking, Finance and Urban Affairs, U.S. House of Representatives.

¹⁷ Higginson, M, (1999), “Alternative Sources of Funding”, Public Transport International, Vol 48, No. 5, September 1999.

¹⁸ Smith, J, 2001, “Does Public Transit Raise Site Values Around its Stops Enough to Pay for Itself (were the value captured)?”, Victoria Policy Institute, Victoria Canada. www.vtpi.org/smith.htm.

¹⁹ Ryan, S (1999), “Property Values and Transportation Facilities: Finding the Transport Land Use Connection”, Journal of Planning Literature, Vol 13, Issue 4, May 1999, pp 412-427,

²⁰ http://www.apta.com/info/briefings/briefing_1.html.

- 1.2.16 Car parking is a crucial element in defining public transport related development. Quite simply, development producing maximum public transport requires high intensity use of land with minimum parking, whereas development with high levels of parking provision serve the contradictory objective of enabling high levels of car use. The urban and cultural context can be very important in analysing different systems, but unfortunately rail system studies do not usually offer thorough explanations.²¹ Reference has already been made to the dependency on cars for access to many North American rail systems, e.g. BART. This means that land around stations is often devoted to parking rather than maximising the active floorspace available within walking distance of the station portal. This is quite different from systems where high building densities and low parking provision have been planned, examples being some of the Vancouver Skytrain stops, some of the Yonge Street Subway stops (Toronto), some of the Washington DC stations, and some of the JLE stations.
- 1.2.17 The literature on this is rather thin, so the main analysis in this report relies on the policy studies and case studies.
- 1.2.18 Similarly road provision in the area served by the new line has an impact on the relative role of the rail service and the car. If road and parking provision is designed to satisfy all demand, then the rail service will play a relatively small role. To this extent the accessibility offered by the rail service will be less important to developers, and consequently will be reflected in low development impact of the line itself. The clearest demonstration of this is perhaps in the study of South Yorkshire Supertram in Sheffield (see below). South Yorkshire has basically actively encouraged and allowed car-based development, while at the same time nursing the forlorn hope that development will be attracted to Supertram locations.²²
- 1.2.19 Porter (op cit) and Pharoah (op cit 1997) both refer to the relatively small importance of rail or bus in the north American context, where typically 90-95% of all trips are undertaken by car. They point to the conundrum whereby the build up of congestion that promotes transit use at the same time drives developers to other locations away from transit corridors. This can only be avoided by a firm clamp-down on development outside transit corridors, and/or incentives to develop within the corridor.
- 1.2.20 This conclusion is supported by a study of the South Yorkshire Supertram, which found that new roads had a far greater impact on

²¹ DTLR, (ODPM, forthcoming), "Planning and Sustainable Access", prepared by Llewelyn-Davies.

²² Haywood op cit

development than the tram.²³ The study was based on an analysis of planning applications, though unlike the LDMS (see later section of this report) data were available on all applications, not just major schemes. The Sheffield experience demonstrates the limited impact on development that light rail schemes can have in the absence of proactive planning policies and mechanisms to secure development that is well related to public transport accessibility.

- 1.2.21 The other problems of the Sheffield Supertram, which are all related to lack of intensity of use are highlighted in the quoted study by Haywood, and also by Pharoah²⁴. These include indirect routing of the lines adding to journey times; the ability of buses to reach the city centre as fast or even faster than the tram; the open competition and lack of integration with buses, which in addition are operated by a separate private company; and a planning paradigm which gives highest priority to economic development, even if this means development outcomes that are car dependent, socially exclusive, and environmentally damaging.

²³ Haywood, R, 1999, "South Yorkshire Supertram: Its Property Impacts and their Implications for Integrated Land Use-Transportation Planning", in *Planning Practice and Research*, Vol 14, No 3, pp 277-299.

²⁴ Hylén, B and Pharoah, T, 2002, "Making Tracks - Light Rail in England and France", Swedish Transport Road and Research Institute.

2 *Policy Update and Review*

2.1 *The changing policy context*

2.1.1 The period between 1998 (the date of the baseline study) and 2002 has been one of significant change in the development of, or at least reinforcement of, Government policy in relation to urban development, design and regeneration. This section briefly describes the most important documents that provide the context for current revisions of borough planning policy.

Planning policy guidance notes (PPGs)

2.1.2 The most relevant changes to Planning Policy Guidance since 1998 are:

- A revised PPG13 Transport, published in March 2001;
- A revised PPG3 Housing, published in March 2000.

2.1.3 PPG13 places greater emphasis on the sequential approach to development, broadening it to all land uses requiring good personal accessibility. This is reinforced by the requirement to produce Transport Assessments to accompany applications for major developments. Perhaps the biggest single change is the introduction of national maximum parking standards. However, in the London context, many of the boroughs already were applying parking maxima below the new national levels. This is an aspect that is reviewed in this study.

2.1.4 PPG3 calls for higher densities and lower levels of parking provision in residential development. A new maximum level of provision has been set at an average of 1.5 off-street parking spaces per dwelling, although the exact meaning of this may be open to interpretation. An interpretation by the Secretary of State suggests that the average can be made up of higher than average provision in rural areas and lower than average provision in urban areas, rather than an average for a particular scheme.

Other significant documents and changes

Urban renaissance

2.1.5 Following publication in June 1999 of the Urban Task Force Report “Towards an Urban Renaissance”, the Government published an Urban White Paper entitled “Our Towns and Cities: the future – delivering an urban renaissance” in November 2000.

2.1.6 The White Paper offered a new vision for urban living which included the following key points: a high quality of life and opportunity for all; people shaping their own future supported by strong local leaders; people living in attractive, well-kept towns and cities; good design and

Llewelyn-Davies

planning which makes it practical to live in a more environmentally sustainable way; towns and cities able to create and share prosperity; and good quality services.

This urban renaissance, the White Paper argues, will benefit everyone, making towns and cities vibrant and successful, and protecting the countryside from development pressure.

London Government

- 2.1.7 London was without a directly elected strategic planning authority from 1986 (when the GLC was abolished) to 2000. During that period a strategic planning framework was produced first by the Department of the Environment, and then by the Government Office for London in the shape of RPG3.
- 2.1.8 The Greater London Authority (GLA) and the office of the Mayor for London came into being on 3 July 2000. The Mayor is responsible for strategic planning in London and his duties include producing and keeping under review a “Spatial Development Strategy” (SDS) for London, which is called the “London Plan”. This is a new form of planning instrument with statutory force within the planning system. It will replace the current regional planning guidance issued by the Secretary of State.
- 2.1.9 Although not yet finalised, initial proposals were published for consultation in May 2001 (“Towards the London Plan - Initial proposals for the Mayor’s Spatial Development Strategy”). The London Plan itself has to have regard to the regional planning guidance for the south east (RPG9, March 2001).
- 2.1.10 Of key significance is the fact that the borough UDPs will have to be submitted to the Mayor for London in order to earn a certificate of general conformity with the London Plan when it is published. Although this process will not take place until the end of 2003, boroughs undertaking revisions to their UDP will have been influenced by the London-wide policies now emerging.
- 2.1.11 Another key change in London’s government that is of potential significance for the study of JLE impacts was the winding up of the London Docklands Development Corporation in 1998. After that date the London Boroughs took over the LDDC areas in terms of planning responsibilities. It was thus possible for the Boroughs either to extend general policies throughout their areas, or alternatively to adopt or modify distinctive policies for the former LDDC areas.

Influential non-statutory documents

2.1.12 A number of other documents with Government sponsorship or backing have been produced since 1998 that have emphasised and further encouraged an approach to new development that is geared to high quality design, re-use of urban land, and orientation of intensive development to public transport accessibility. Other policy objectives have featured more prominently since 1998 such as the use of mixed use schemes to foster more vibrant places, social inclusion and the related issue of “affordable housing”, and community development.

2.1.13 In assessing changes at the borough level, it is important to recognise the influence of other related documents on policy formulation and revision. Examples of these documents are:

- “Sustainable Residential Quality” (Llewelyn-Davies for London Planning Advisory Committee, DETR and others, January 2000).
- “By Design - Urban Design in the Planning System: towards better practice”, (DETR, Commission for Architecture and the Built Environment, May 2000).
- “Urban Design Compendium”, (Llewelyn-Davies for English Partnerships and the Housing Corporation, 2001).
- “Better Places to Live by design: a companion guide to PPG3” (DTLR, September 2001).
- “Planning and Sustainable Access” (Llewelyn-Davies for DTLR forthcoming).
- “Transport Assessments Guidelines” (SDG and Llewelyn-Davies for DTLR forthcoming)
- “Transport Development Areas: a study into achieving higher density development around public transport nodes”, (Symonds for RICS, 2000).

3 Overview of changes in Borough policy since 1998

3.1 UDP Revisions

3.1.1 Almost three years have elapsed between the baseline study of UDP policies and the update carried out for this report. As discussed in the previous section, this short period saw a considerable shift in policy emphasis, and a wider recognition of what is involved in aligning land use and location policy more closely to transport and accessibility considerations. The JLE boroughs have been attempting to adjust their planning policies in recognition of this.

3.1.2 Table 4.1 provides an impression of the degree of change that has taken place in policy areas of importance to the JLE. The change is relative to the position in that borough at the time of the baseline study. Where a strong degree of change is indicated, it must be pointed out that this may be because the borough concerned was starting from a “low base”.

3.1.3 This is necessarily a subjective assessment, but two points are highlighted. First, there has been considerable policy change during the period, even though the changes may not yet be formalised into a UDP revision. Second, the changes are not uniform between the boroughs.

Table 4.1 Assessment of degree of policy change 1998-2002

Policy area	Westm'r	Lambeth	S'wark	Tower H	G'wich	N'ham
PT orientation generally	○	●	●	●	●	●●
Specific interpretation for JLE	○	●	●●	●	●●	●
Density as a criteria	●	●	●	●	●	○
Parking policy	●	●	○	●	●	○
Use of access criteria	○	●	○	●	●	●
Quantified access criteria	○	●	○	○	○	○

- Little or no change in policy
- Policy change
- Significant policy change

“Waking up to public transport oriented development”

- 3.1.4 What is apparent from this policy review is that the JLE boroughs are now much more aware of the development potential of the JLE, and are much more inclined than before to take a pro-active view of how and where this potential should be realised.
- 3.1.5 The development of new policies, however, does not in itself bring about a change in development. It is necessary also for private sector development interests to be in tune with the new policy aspirations, and to be prepared to invest in the type of scheme envisaged. This in turn will be related to the economic realities of the development market.
- 3.1.6 The degree to which policy and development interests coincide varies between the different station catchments. In some cases there is evidence of development pressures that match the policy intentions, for example at Canary Wharf. In other cases there is an apparent gap, at least so far, between policy intentions and developers’ apparent willingness to come forward with appropriate schemes.
- 3.1.7 There are various possible reasons for such gaps:
- Some policy aspirations may be over-ambitious in relation to market realities (e.g. perceptions of accessibility, size of overall market for commercial uses);
 - Policy aspirations may be long-term, compared to development interests, and the gap may be closed over time;
 - There may be no gap between policy and developer aspirations, but there may be land, planning, funding, environmental or other issues that have to be resolved before firm development proposals can come forward.
- 3.1.8 Table 4.2 is an attempt to summarise the position by station catchment. Again, this must necessarily be a subjective exercise, but the following point can be highlighted. The gap between policy and developer response is most apparent in those locations where a major change in the character or scale of development is desired, or where currently there is little “critical mass” in terms of the sought after development. Putting it another way, it appears that a positive development impact is more uncertain in those areas with most potential for major change
- 3.1.9 Specifically:

- Canada Water - new development is sought which will be fundamentally different from the “suburban style” retail and leisure uses currently within the walk-in catchment;
- North Greenwich - intensive mixed use development is sought on sites which currently are either in industrial use (Delta Wharf), vacant (Millennium Dome), or underused (surface car parking);
- West Ham - mixed use development is sought within the walk defined catchment area which at present is predominantly residential and low-intensity industrial or commercial. In addition access is fragmented by water and other barriers.

Table 4.2 Policy and development demand in JLE station catchments

	Change or likely change of planning policy	Evidence of Demand in line with new policy	Demand for Commercial or Residential?	Transport factors other than JLE?
Westminster	No	-	-	Yes
Waterloo	Yes	Yes	Both	Yes
Southwark	(Yes)	Yes	Both	No
London Bridge	(No)	-	-	Yes
Bermondsey	(Yes)	Yes	Primarily residential	No
Canada Water	(Yes)	Yes	Both	Yes
Canary Wharf	(Yes)	Yes	Primarily commercial	No
North Greenwich	Yes	Limited	Leisure and residential	No
Canning Town	Yes	Limited	Both	No
West Ham	Yes	Limited	Both	No
Stratford	Yes	Yes	Both	Yes

Brackets indicate that draft UDP revision is not yet published

Overview of policy change towards public transport oriented development

3.1.10 Table 4.3 sets out the initial framework that was used to assess the degree to which borough plan (UDP) policies addressed the issue of

what is termed “public transport oriented development. The right hand column summarises the changes in policy since 1998, as judged by the author on the basis of the interviews with planning officers and the plan documents. The table gives an overview of the changes for the entire JLE corridor. More detailed policy assessments for each borough are discussed later in this section.

Table 4.3 Summary of UDP policy changes (towards public transport oriented development)

UDP questions	Summary of Change 1998 to January 2002
1 UDP supports PTOD*?	Support for PTOD is more specific in the revised UDPs, and is expected in the UDP revisions yet to emerge
2 Station catchments in particular?	More specific mention is made of station catchments, especially in the context of non-central London areas
3A Higher densities allowed-reqd?	Densities higher than previously are now encouraged, and sometimes required, though numerical standards have mostly been dropped from the revised UDPs
3B Density related to accessibility?	Higher density is now more specifically referred to in relation to public transport accessibility, though this is not generally allied to objective accessibility measurement
3C Specific uses allowed-promoted?	There is now greater emphasis on mixed use development, affordable housing and (in most station catchments) non-residential uses
3D Conditions or obligations for PT?	Public transport is not singled out for special mention in relation to guidance for developers on S106 contributions
4 Distinguish interchange stations from other stations?	Tower Hamlets intends to be more specific as to which type of development is appropriate at which kind of station. The principles are gradually being reflected in revised policies, even they are not always made explicit.
5 Distinguish inbound-outbound?	The key point is that trip attracting development requires access from more than two directions, i.e. via an interchange or node rather than a single stop. Trip generating development (residential) can be related to a single stop. These principles are not explicit in the UDP documents.
6 Special policies for JLE stations?	The UDP revisions contain few policies with regard to JLE stations themselves. There are policies with regard to funding access ways to stations, and restricting on-street parking in their vicinity.
7 "Station community" policies	Some stations now are the subject of forthcoming master plan exercises.
8 Parking stds. related to access?	The UDP revisions bring parking standards into line with planning guidance, RPG3, RPG9 and PPG3 for Housing. Maxima are now more likely than not to vary with accessibility, though sometimes only in very broad terms (e.g. Greenwich town centre and the rest of the borough)
9 Catchments have SPG*-Briefs?	See 7 above
10 Any other JLE station policies?	As previously, there are few policies that related to specific JLE stations

* *PTOD = Public Transport Oriented Development, see paragraph 7.4.8*

+ *SPG = Supplementary Planning Guidance*

Other significant policies

3.1.11 Supplementary planning guidance (SPG) can be a useful means of updating or elaborating policies in particular areas, or on particular topics. There is a significant emergence of such SPG in the JLE corridor consisting partly of development briefs for major sites (e.g. Millenium Quarter on the Isle of Dogs, and a new district centre at Canada Water), and partly topic SPGs (high buildings in Tower Hamlets, Parking in Newham).

3.1.12 This planning activity reflects:

- An increasing emphasis by the JLE boroughs on a “plan-led” approach;
- A need to provide more detailed guidance on the development of specific areas (such as areas around JLE stations); and
- The desirability of providing firmer planning policies in advance of a full UDP review, in areas subject to development pressures.

3.1.13 Each of these aspects is important in delivering better public transport oriented development. Although responding to the market remains a feature of planning control, the principal of shaping and influencing the market through the provision of planning frameworks and strategies has emerged more strongly in the JLE boroughs since the time of the baseline study.

3.2 *The motivation for policy change*

3.2.1 The following questions are pertinent to this study:

- The JLE itself – has policy changed as a result of the JLE or the increased accessibility it confers?
- Changes to national and regional policy framework – have these produced changes in borough policy that promote the development potential of the JLE?
- Other factors (e.g. local politics) – Are there other factors that have influenced changes in policy that need to be taken into account?
- Land or site availability or private sector-led policy changes? Canary Wharf, Millennium Quarter?

These are considered below in the review of policies of the six JLE boroughs.

3.3 *Method of approach to UDP review*

3.3.1 Before describing the policy changes borough by borough, the method used is set out in the following paragraphs.

3.3.2 The following reports provide the baseline for this review:

- Baseline Working Paper 9 “Review of Planning Policies” (1998);
- Baseline study Working Paper 23 “Draft Development Activity Interim Report” (August 1999), which gives a summary of the above.

3.3.3 The UDP baseline was June 1998 (See Working Paper 23, p.12). The dateline for this impact study is the end of February 2002.

Table 4.4 UDP status at March 2002

	UDP status at June 1998 (date of baseline study)	UDP Review status in February 2002	Other documents reviewed
Westminster	Adopted July 1997	First Deposit Sept 2000 Second deposit draft agreed in November 2001 and published for consultation in January 2002. Consultation from Monday 21st January to Friday 1st March 2002.	
Lambeth	Adopted Aug 1998	Key Issues paper 2001 Consultation ended July 2001 Deposit Draft published February 2002. (New streamlined style, claimed to be unique to Lambeth)	<ul style="list-style-type: none"> • London South Central: Restoring London's Hidden Quarter
Southwark	Adopted July 1995	Pre-deposit consultation (Key issues paper May 2001) Deposit Draft not due until March 2002 at the earliest, so not available for review in this project	<ul style="list-style-type: none"> • Bermondsey Spa * regeneration strategy, Llewelyn-Davies for L. B. Southwark, 2001. <p>* An area of Bermondsey</p>
Tower Hamlets	Adopted 1998 (Virtually the same as draft version reviewed in baseline study)	The UDP review is underway, with a key issues paper to be produced in 2002. This was not available for this review	<ul style="list-style-type: none"> • <i>Millennium Quarter</i> master plan to be included in key issues paper, with view to SPG ?.
Greenwich	Adopted Nov 1994	Deposit January 2002	<ul style="list-style-type: none"> • English Partnerships “Greenwich Peninsular Master Plan” (1998?)
Newham	Adopted June 1997	UDP review adopted June 2001	<ul style="list-style-type: none"> • Lower Lea Valley Draft Planning Framework
London Plan	N/A	Consultation draft May 2001 “Towards a Plan for London”	

Analytical framework

3.3.4 The baseline report (1998) included a standard set of information for each of the 6 boroughs as follows:

- Status of UDP and relation to national/strategic guidance;
- Summary of the main points from the UDP;
- Regeneration policies;
- Commercial development policies;
- Density standards and plot ratios;
- New development and the public transport network;
- Transport and movement policies;
- Specific policies and proposals for areas around stations (listed by station);
- Listing of relevant policies in the UDP.

3.3.5 In addition, appendices covered:

- References;
- Density standards;
- Parking standards.

3.3.6 All of these above aspects were reviewed for this report, but where no policy change had occurred, the policies are not repeated. Not all of the boroughs had arrived at a review of the relevant policies, as shown in the table above.

3.3.7 This review of UDP's and other planning policies focuses on the relationship between the UDP's and the JLE. A number of questions were posed to a senior planning representative from each borough:

- 1 What is the current status of the UDP and its review? What other key policy documents are available?
- 2 Is the UDP generally supportive of increased development activity at sites accessible to/by public transport? (i.e. Public Transport Oriented development, whether or not the JLE itself is specified.)
- 3 Are station catchments (whether JLE or not) identified as offering particular potential?
 - If so, what is this potential?

- Higher density generally required or allowed?
 - Are densities related to accessibility levels?
- 4 Specific land uses promoted or allowed?
 - 5 Are such land uses promoted or allowed subject to planning conditions or obligations? (e.g. for improvements to access routes to stations)
 - 6 Is a distinction drawn between interchange stations and other stations? In particular is any distinction made between development requiring inbound (many points to one point) and outbound accessibility (one point to many points)? This is significant in terms of the different accessibility requirements between residential and non-residential development)
 - 7 Are JLE station catchments subject to specific policies, or identified as offering any distinctive potential?
 - 8 Are parking standards related to levels of accessibility (to public transport, or to local facilities)?
 - 9 Are there any “station community policies” (SPG, developments briefs, masterplans etc) whereby catchments are planned as specific local communities?
 - 10 Are there any other policies related to JLE station catchments, or stations themselves? (e.g. station access plans, or interchange policies)
 - 11 Are there other rail/station issues: eg Crossrail, that may impact on development?

3.3.8 These questions are answered in terms of the position at June 1998 (baseline study) and changes that occurred up to February 2002. This is shown in a table produced for each Borough.

3.3.9 The agenda for meetings with the Borough officers responsible for the UDP revisions included:

- 1 UDP policy changes and developments;
 - 2 Other policy documents and practice (SPG etc);
- (1 and 2 included the list of questions set out above)
- 3 Case study sites;

- 4 Additional case studies (potential);
- 5 Follow up matters and contacts.

Documents available

3.3.10 The key policy documents available for the review are set out below:

City of Westminster

The document reviewed was the 2nd deposit draft of the revised UDP for Westminster. “Unitary Development Plan, Shaping the Future of Westminster: as agreed for second deposit, 29th October 2001”, published January 2002.

London Borough of Lambeth

The main document reviewed was the first deposit draft of the revised Lambeth UDP, “The Lambeth Plan”, January 11th 2002.

Also reviewed (though the main points are incorporated into the UDP) was the South Central Strategy document.

LB Southwark

No draft of the revised UDP had been produced during this study, and potential changes to the UDP were assessed through interview only.

Also reviewed was “Bermondsey Spa: a Strategy for Regeneration”, Llewelyn-Davies for L. B. Southwark, 2001.

LB Tower Hamlets

No revised UDP was available at the time of the study, and potential changes to the UDP were assessed through interview only.

LB Greenwich

The deposit draft of the revised UDP was issued in March 2002.

LB Newham

The adopted revised UDP was issued early in 2002.

3.4 ***Westminster Policy Review***

Status of UDP

3.4.1 The second deposit draft of the revised UDP was approved by the Council in October 2001, and was published in January 2002. No other policy documents have been reviewed for this study.

Overview of policy changes

- 3.4.2 No major changes in policy have taken place since 1998, but standards have been revised to take account of changes in national policy guidance, especially with regard to affordable housing, density and parking standards.

The JLE in the City of Westminster

- 3.4.3 The baseline study included consideration of Westminster station, as this was part of the JLE. However, Westminster has four other stations on the pre-existing Jubilee Line. All the pre-existing stations of course benefit from the extra accessibility to south central and east London provided by the JLE. (The closure of the Jubilee Line station at Charing Cross has resulted in reduced accessibility in that area.)
- 3.4.4 The central area parts of Westminster have such high accessibility by public transport that City Council policy makes little distinction between locations close to underground stations and other central area locations. The revised plan does, however, refer to “better integration of land use and transport” being achieved by “major developments being sited at, or close to, major public transport interchanges”. The concept of Transport Development Areas (TDAs) where a more dense development would be allowed is also mentioned, though again the entire Central Activities Zone (CAZ) is regarded as an equivalent TDA in Westminster.
- 3.4.5 The revised UDP barely mentions the JLE. This reinforces the general proposition that central Westminster is highly accessible by a dense network of public transport routes, both road and rail, of which the JLE forms a part. The impact of the JLE was confined to:
- The switch of route from Charing Cross to Westminster;
 - The extension of the Jubilee Line into East London, which increased capacity in that direction, and also provided the first direct rail link to Canary Wharf from Westminster.
- 3.4.6 This means that increased direct accessibility (without the need for interchange) has been provided by the JLE at stations in Westminster other than just the new station at Westminster. Within the central area these stations are Baker Street, Bond Street and Green Park, and if the JLE had a distinct impact on development in Westminster, one may expect to this to be reflected at these stations.

Bond Street Station

- 3.4.7 Taking Bond Street as an example, this lies in the heart of the prime retail area of the western portion of Oxford Street. There have been retail developments in the period since the JLE authorisation, but the sites are served not just by Bond Street station but also by Oxford Circus and of course many bus routes. It is unlikely that any JLE effect could be distinguished from general retail trends in the area.

- 3.4.8 A possible exception to this would occur if the opportunity had been taken to redevelop Bond Street station to accommodate additional passengers resulting from the JLE. This was not done.
- 3.4.9 This issue will be raised again as the planning of Crossrail is progressed. The Crossrail station that will serve this area is likely to have a principal entrance at or near the existing Bond Street station. The opportunity might then be taken to create a wholly new Bond Street station providing more extensive interchange between the existing tube lines and the new Crossrail line.
- 3.4.10 This raises a somewhat different issue from elsewhere on the JLE. The land and airspace required to handle the passenger numbers that would be expected in the post-Crossrail situation would be much greater than at present. This means that potential development land and airspace will be reduced within in any given development volume. However, unless planning restrictions are imposed which limit building height and volume, then the new station should not have any significant impact on the total floorspace available.

Westminster Station

- 3.4.11 Within Westminster station catchment there is little opportunity for any redevelopment that would result in increased intensity of uses. The area is mostly “built out” and is subject to a range of conservation and other policies that limit the scope for redevelopment.
- 3.4.12 Where large scale redevelopment is possible, the scope for greater intensity of activity is limited. An example is the so-called “Marsham Towers” site, the former headquarters of the Department of the Environment. This is to be redeveloped with a mixed use scheme incorporating 64,000 square feet of new offices together with residential and Class A uses. In the same street, Romney House is to be redeveloped with 20,000 square feet of offices plus retail, but a planning permission granted in 1999 has not yet been implemented.

Density Standards

- 3.4.13 Along with other boroughs in the JLE corridor, while the general principal is supported of having higher density development at accessible locations (public transport nodes), the use of density standards (both maximum and minimum) has been dropped from the Westminster UDP. The aim instead is to get the best possible use for each site, and this requires a design-led approach which addresses all the circumstances of the site. The use of numeric density standards had already been dropped from the process, as it was felt to be irrelevant to the process. The comment was made that “we used to work out the densities once the scheme had been agreed, just to check them against the standards in the UDP”.

Car parking standards

3.4.14 Car parking standards have been revised in line with London-wide guidance provided in RPG3. However, the residential maximum levels are now aligned to PPG3 (Housing) which, compared to the First Deposit draft, are more generous.

Table 4.5 Summary of Westminster Policy Changes

UDP questions	Current Plan	Summary of Change June 1998 to March 2002
UDP supports PTOD*?	Yes	No significant change
Station catchments in particular?	No	No significant change
Higher densities allowed/required?	Both	Density standards have been replaced by design-led criteria
Density related to accessibility?	In general terms	No significant change
Specific uses allowed-promoted?	Yes	More specific policies regarding the mix of uses in different parts of the central area
Conditions or obligations for PT?	Yes	Developers expected to meet transport (and other) costs of development
Distinguish interchange stations and other stations?	In general terms	No change, but mention of Central Activities Zone as the equivalent of a “Transport Development Area”
Distinguish inbound-outbound?	No	No change
Special policies for JLE stations?	No	No change
"Station community" policies	Not explicitly	No change
Parking standards related to access?	No	Parking standards brought into line with RPG3 (non-residential) and PPG3 (residential) New requirement for “Transport Impact Assessments”, which do assess accessibility
Catchments have SPG++ Briefs?	No	No change
Any other JLE station policies?	No	No change

+ *PTOD = Public Transport Oriented Development*

++ *SPG = Supplementary Planning Guidance*

3.5 ***Lambeth Policy Review***

Status of UDP

- 3.5.1 Waterloo is the only JLE station in Lambeth. This section reviews the general policy changes included in the January 2002 deposit draft of the revised UDP, and looks in more detail at those policies relating to the Waterloo area.
- 3.5.2 A context for development in Lambeth and Southwark is the “London South Central” regeneration initiative. A report was published in March 2000 by the partners (led by Keith Hill, MP) called “London South Central: Restoring London's Hidden Quarter”. This suggests tackling deprivation by extending central London activities south of the river (at Waterloo and Vauxhall) to benefit local residents.
- 3.5.3 Lambeth’s revised UDP (deposit draft) was published in January 2002. This gives stronger emphasis than the previous plan to the location of higher intensity development within station catchment areas or, more precisely, within accessible locations.

Public Transport Oriented Development in the UDP review

- 3.5.4 The new plan is somewhat more explicit than its predecessor in setting out the need to focus trip-attracting development at locations that are highly accessible by public transport. It addresses this by identifying nodes in the public transport system that also have the potential or need for intensive and mixed-use development. These nodes are designated on transport grounds, but also take account of community and economic regeneration objectives in the borough.
- 3.5.5 The major nodes identified are:
- Waterloo (see below)
 - Vauxhall
 - Brixton
 - Streatham Station (ice rink site etc.)
 - Loughborough Junction (will become more accessible with Thameslink 2000 & the east London Line extension to Brixton.)
- 3.5.6 Parking standards have been revised. In line with guidance, three bands of parking maxima in new developments are identified, with the most restrictive maxima (i.e. lowest levels of provision) in the most accessible locations. The three categories are:

- 1 Central London (i.e. Waterloo and Vauxhall areas);
- 2 Other accessible nodes (see above); and

3 The rest of the borough.

- 3.5.7 In the most accessible locations in particular, the borough expresses a problem with the maximum standards for residential development set out in PPG3 (Housing) of 1.5 parking spaces per dwelling. It is argued that in accessible locations suitable for high density housing, even 0.5 spaces per dwelling can be difficult to accommodate in design terms. For example a residential tower with 1000 homes would result in 500 spaces being provided.
- 3.5.8 It should be noted, however, that all standards are now maxima, so that it is open to any local authority to negotiate downwards the levels of provision on any particular site.

Waterloo Area Policies

- 3.5.9 Waterloo is the most accessible location in the Borough, and served by the JLE. The plan provides in some detail the form of development that the Borough wishes to see at Waterloo, and broadly this ties in with the “London South Central” initiative referred to above.
- 3.5.10 Key features of the plan for the Waterloo area are described below. First, however, some commentary is offered on the broad policy aspects.
- 3.5.11 The plan argues that the capacity of the stations is being reached, and that further development will add to demand and create unacceptable conditions. The only solution “if the regeneration potential of the area is to be realised is to expand transport capacity”.
- 3.5.12 On the face of it, this has a circular logic:

We have potential for development because the area is accessible, but the transport capacity is limited, so we must increase the transport capacity (accessibility) in order to release the potential.

One may draw the opposite conclusion that it is the development potential that is limited by the transport capacity, and that therefore the solution lies in expanding neither development nor transport at Waterloo.

- 3.5.13 There are, however, arguments in favour of major redevelopment and transport expansion at Waterloo, even if the Plan itself does not set out to explain them.
- 3.5.14 First, there are forecasts that suggest train capacity at Waterloo main line station will be exceeded by 2008. There are already pedestrian circulation problems at the station. If these problems require a remodelled station anyway, then development projects can both fund and exploit the extra capacity.

- 3.5.15 Second, the policy objective of focusing travel-attracting development at highly accessible nodes on the public transport system (referred to in the Plan and elsewhere as Transport Development Areas(TDAs)), places Waterloo in a favourable position.
- 3.5.16 Third, while such policy aspirations in some of the other boroughs (Greenwich and Newham for example) are unmatched by developer-interest, at Waterloo private sector development interest is said to be strong. For example, according to the planning officer interviewed, there was expressed developer interest for 3 million square feet of offices alone. If such higher intensity development is capable of funding the necessary transport measures to make it work, then the strategy would be entirely in tune with the expressed broader policy of focusing development in accessible locations.²⁵
- 3.5.17 Where does the JLE fit into this? The Lambeth UDP specifically identifies that the Underground station at Waterloo is nearing capacity (presumably at peak hours only, though this is not mentioned). The JLE station is included in this perception (though again this is not explicit in the plan). This raises the issue as to the significance of the JLE at Waterloo in terms of development rather than purely as an element of transport interchange. The Borough view is that the JLE is significant in providing “leeway” in terms of Underground capacity. It may be seen as maintaining development pressure that otherwise might have been suppressed by transport difficulties.
- 3.5.18 Three points can be made regarding the potential development impact of the JLE at Waterloo:
- Waterloo was already one of the most accessible locations in London before the JLE. It would therefore be difficult to separate the impact of the JLE on development from other accessibility factors.²⁶
 - If there was a separate positive impact this is likely to have occurred in the period between authorisation and the time at which overcrowding (or perception of it) occurred.

²⁵ A study undertaken for the borough (not made available to the researcher) reportedly had suggested a potential for total planning gain at Vauxhall of £10-20m, and a transport interchange cost of around £15m). As noted elsewhere in the report, it would be unusual for developer contributions to meet more than a relatively small proportion of the total transport costs. The scale of transport investment at Waterloo will of course be vastly greater than at Vauxhall.

²⁶ In terms of rail track access to Waterloo, the JLE added two through tracks to an existing 8 through tracks, and 26 terminating tracks (Waterloo is the largest terminus in London).

- To the extent that the JLE at Waterloo (and on the trains travelling to and from Waterloo) is overcrowded or perceived to be overcrowded, this would tend to negate the hypothesis that the JLE is capable of stimulating development demand at Waterloo.

3.5.19 From the borough's viewpoint, the cross-river Light Rail scheme between Camden and Brixton is seen as more significant than the JLE. This would assist onward travel from Waterloo terminus, but also provide more direct public transport access for development sites in the Waterloo area, especially if (as the borough wishes) it is routed via Vauxhall, rather than The Oval.

Developments at Waterloo

3.5.20 The UDP review describes the intended remodelling of Waterloo station, together with the major redevelopment of areas around the station. A total of 20 sites are identified within the catchment area of the station where redevelopment or remodelling could or should occur during the life of the plan. Office, leisure and retail are all mentioned within the context of major mixed use development schemes.

3.5.21 In addition, the aim is to manage this in a way that does not compromise the interests of the existing residents and businesses. It is also intended that the new development will include significant new residential provision. New offices are to be kept within defined areas, and mixed use must be provided.

3.5.22 The Waterloo section of the plan in fact describes a very wide range of new developments, as well as community provision and major improvements to public space, to road and transport facilities, and protection of important buildings and views. It is an impressive menu, and the question will be raised as to whether realistically everything can be accommodated. Unlike the catchment areas of Canada Water, Canary Wharf, North Greenwich, Canning Town, West Ham and Stratford, Waterloo is already built up. Increasing development intensity there will require ingenuity in terms of urban design, and major investment in site preparation. The borough clearly believes that there will still be enough surplus value for the new developments to fund public realm and public transport improvements, including the major remodelling of Waterloo main line station.²⁷

3.5.23 The provision of road and footway access to the Waterloo public transport facilities will require a lot of ground or air space, which in the researcher's view potentially could diminish the potential for other development. However, the congestion charge scheme, depending on

²⁷ The aim here is increase capacity by providing for longer (12 or 14 car) trains by removing the present concourse and creating a new pedestrian circulation area underneath the platforms (as at Waterloo International currently).

reductions in traffic levels achieved, provides the opportunity to reduce road space in the area, enabling an expansion of footway capacity without taking development land. An example of how the reduced traffic capacity is to be exploited is Lambeth's proposed "peninsularisation" of the Waterloo roundabout, enabling the IMAX cinema to be linked at ground level with Waterloo station, and the inclusion in the peninsular of a new bus station.²⁸

²⁸ Interview with planning officer responsible for UDP.

Table 4.6 Summary of Lambeth Policy Changes

UDP questions	Current Plan	Summary of Change June 1998 to March 2002
UDP supports PTOD*?	Yes	Central London zone identified (including Waterloo catchment) and other nodes in the borough
Station catchments in particular?	Yes	Stronger support for high intensity development within station catchments
Higher densities allowed/required?	Both	Density standards have been abandoned in favour of design-led approach. There is no specified minimum but low density would not be accepted.
Density related to accessibility?	Yes	Yes, in relation to the accessible nodes. The Capital model of accessibility informs this.
Specific uses allowed-promoted?	Yes	Uses at Waterloo are more explicit in the revised plan. It notes that conflicts with local community have largely been resolved. In the Central London area of North Lambeth, development must be for central London activities, and not result in the loss of such uses. The uses are specified in the Plan, and include residential use.
Conditions or obligations for PT?	Yes	Shortfalls in transport capacity at Waterloo and Vauxhall are being audited. The costs of rectifying deficiencies will be divided between developments according to their site values.
Distinguish interchange stations and other stations?	Yes	The intensive development areas are nodes, not single stops. This is more explicit than before
Distinguish inbound-outbound?	In general	Not expressed in this way.
Special policies for JLE stations?	No	No change
"Station community" policies	Yes	Waterloo policies more detailed than in previous plan
Parking standards related to access?	Yes	New standards related to three levels of accessibility. This is "informed" by the "Capital" model of accessibility. The Mayor's strategy has adopted a cap on parking provision in the congestion charge area.
Catchments have SPG++ Briefs?	Yes	Parkman International (now running LBL engineering services) is carrying out a £1million study of transport requirements at Waterloo.
Any other JLE station policies?	No	No change

3.6 *Southwark Policy Review*

Status of the UDP

- 3.6.1 At the time of this study, no revisions to the approved UDP had been published. There have apparently been significant changes in policy thinking since the approved UDP, together with the transfer of powers from the LDDC, whose area encompassed the Canada Water catchment.
- 3.6.2 It is expected that the revised plan, when published, will take a more pro-active stance than its predecessor with regard to developments within the JLE station catchments, especially at Canada Water, where the intention is to promote a higher-intensity district centre. In advance of publication, however, these changes cannot be confirmed.

The direction of policy change

- 3.6.3 Density standards include maxima, but higher densities are now allowed in accessible locations, and as with Westminster, density is now rarely referred to as a determining factor. There is no wish to allow “carte blanche” for higher densities, and the borough wishes to guard against over-development.
- 3.6.4 Specific land uses are not promoted, though employment land is protected where possible. Exceptions are made, for example where buildings have become obsolete.
- 3.6.5 Parking standards currently are uniform for the whole borough, but the need to revise this according to variable accessibility is to be addressed in the revised UDP. Residential parking standards are already consistent with PPG3 maxima (1.1 per dwelling).

The JLE in Southwark

- 3.6.6 There are four JLE stations in the borough, namely Southwark, London Bridge, Bermondsey and Canada Water. The catchment areas of these stations have different characteristics, and the planning policies for these areas would be expected to reflect these differences.

LDDC and L. B. Southwark

- 3.6.7 A potentially significant change since 1998 has been the transfer of planning responsibilities in the Canada Water area from the London Docklands Development Corporation to LB Southwark. This may, for

example, have meant a tightening of parking standards. (LDDC generally allowed more parking than in the Boroughs.)

Southwark Station

- 3.6.8 The western portion of the catchment area defined in the initial study lies in Lambeth, and overlaps the catchment of Waterloo. Southwark station may appeal to passengers because of its easy access and low levels of crowding compared to Waterloo. In terms of any change in development pressure, however, it may be difficult to disentangle the effect of this new station from that of Waterloo. The general increase in rail accessibility may be responsible for increased development interest in the area.
- 3.6.9 The Lambeth representative argued that the JLE impact is more noticeable at Southwark station than at Waterloo. The proposal for a new office building opposite Southwark station (Southpoint) was cited as an example of this, and this is explored further in the case study report.
- 3.6.10 The northern sector of the Southwark station catchment includes the Tate Modern. The Gallery had commissioned its own study of how the surrounding area should develop, and the borough was cooperating with this. No drafts were available for review.

London Bridge Station

- 3.6.11 As with Waterloo and Southwark, London Bridge is subject to the policy framework provided by the London South Central Study (see section on Lambeth above). This means in essence the decision to promote high intensity development appropriate to the central area. In the case of London Bridge, however, such a shift was already apparent prior to JLE authorisation, with the development of major new office buildings near the station, and the regeneration of Hays Wharf.
- 3.6.12 A planning rather than an ownership-led approach is seen as the likely way forward at London Bridge, and a “London Bridge Study” was to be commissioned by the Council.
- 3.6.13 The JLE has significantly increased Underground accessibility and interchange, adding an east-west link to the north-south link provided by the Northern Line.
- 3.6.14 The main line services from south east London provided good access to Charing Cross, but the JLE links London Bridge more effectively to other parts of the West End. London Bridge station will be remodelled to eliminate the bottleneck that currently limits capacity on Thameslink routes. The greater importance of London Bridge as a major interchange is likely to support the regeneration potential of the area, but again, the

JLE is a part of the overall accessibility, and its impact could not be distinguished.

Bermondsey station

- 3.6.15 Bermondsey, like Southwark, is a single line station without interchange with other rail services. Unlike Southwark, its catchment is not overlapped by any significant interchange station. Because of this, the development potential is likely to focus on residential and supporting uses, rather than significant commercial or leisure uses.
- 3.6.16 Emerging regeneration strategies for the area, for example for “Bermondsey Spa” (an area of Bermondsey), reinforce this assumption.
- 3.6.17 As noted in the case studies report, there is evidence of increased developer interest in higher density and mixed use developments within the Bermondsey catchment. Property developers are interested in council-owned housing sites within the walkable catchment of the station.

Canada Water Station

- 3.6.18 Canada Water offers interchange with the East London Line. Currently this is a shuttle between Shoreditch and New Cross, though it is planned to form the core of new services to Dalston in the north and as far as Croydon and Wimbledon to the south. Canada Water will thus in future be a more significant interchange.
- 3.6.19 A significant development in planning thinking for the area is that a new district centre should be developed with higher intensity of uses. The need to prepare and agree a masterplan with landowners is acknowledged, but without the revised UDP framework there is a policy vacuum. A development brief is being prepared in parallel with the revised UDP, led by the borough’s property team, but no drafts were available for review.
- 3.6.20 This will include the “recycling” of sites initially developed in LDDC days, which are now seen as too low in density terms and too car-dependent. More local public transport access is seen as necessary to reduce the impact of more car traffic that would follow intensification of development. However, at the time of interview the borough representative acknowledged that as yet “even the basic planning intentions had still to be resolved”.
- 3.6.21 Current development, especially the Surrey Quays shopping centre and nearby retail, restaurant and leisure uses, has generous provision of surface car parking, and is poorly related to Canada Water station.
- 3.6.22 At present there is a large amount of land adjacent to the station that is either vacant or used for surface car parking. The car park nearest to the

station (and furthest from Surrey Quays shopping centre, was closed at the time of survey in March 2002, signifying lack of parking demand).

3.6.23 As reported in the baseline study, developments close to the station that had been approved up to that time paid little attention to the proximity to the station. The case study sites included “retail shed” format schemes which have generous parking provision and buildings that are situated behind the parking area, in direct contravention of the advice offered in support of PPG13. Such developments are aimed at access by car.

3.6.24 There have been significant residential developments close to the station, including 5 and 6 storey flat developments. These do reflect their proximity to the station. Even so, little has been achieved in opening access on foot to Canada Water station. For example, the Pumping Station case study site is mentioned as being within 200 metres of the station, but in fact no footway link has been provided, and the actual distance from the station (as opposed to the air-line distance) is more than 400 metres (case study CW4).

3.6.25 Much of the pressure for development within the Canada Water catchment has been for residential development on the waterfront. Some of this, including the Globe Wharf case study, lies within a ten minute (800 metre) walk of the station, but development in the easternmost part of the catchment area is harder to attribute to the JLE station, since the actual walking distance is in excess of 1600 metres (20 minutes), and along routes that in many parts are uninviting or even dangerous. These peripheral areas appear to rely on bus services to link with the JLE (route 225 links with Bermondsey and Rotherhithe as well as Canada Water station). For access to Canary Wharf, there is a ferry service from the Docklands Hilton hotel (at Nelson Wharf), which also runs upstream to the City and the West End. The hotel offers a courtesy bus to Canada Water station, again indicating its location outside the walkable catchment.

Table 4.7 Summary of Southwark Policy Changes

UDP questions	Current Plan	Summary of Change June 1998 to March 2002
UDP supports PTOD*?		No revised plan produced in timescale of this review. Changes are reported intentions for the revision.
Station catchments in particular?	Yes	Yes, particularly in former LDDC areas
Higher densities allowed/required?	No	Yes
Density related to accessibility?	No	Allowed where good access, but maxima may be retained
Specific uses allowed-promoted?	No	Probably
Conditions or obligations for PT?	No	Possible promotion of “district centre” uses at Canada Water

Distinguish interchange stations and other stations?	No	Not known
Distinguish inbound-outbound?	No	Probably
Special policies for JLE stations?	No	Not known
"Station community" policies	No	Not known
Parking standards related to access?	No	Not known
Catchments have SPG++ Briefs?	No	Not known
Any other JLE station policies?	No	Development briefs at least for London Bridge and Canada Water
	No	Not known

3.7 *Tower Hamlets Policy Review*

Status of UDP

- 3.7.1 The plan was adopted in December 1998, after the baseline study. The adopted plan contained no changes relevant to the JLE compared to the deposit draft considered in the baseline study. There were no formal revisions at the time of this review. (An issues paper was published in 2002, after the research for this study was concluded.) A masterplan had been produced for the Millenium Quarter (within the Canary Wharf catchment area) and this will be incorporated in the issues paper with a view to becoming a Supplementary Planning Guidance (SPG) document in advance of the UDP revision. This is dealt with below. A high buildings SPG is also to be produced.

LDDC and Tower Hamlets

- 3.7.2 A potentially significant change since 1998 has been the transfer of planning responsibilities in the Isle of Dogs from the London Docklands Development Corporation to LB Tower Hamlets. This may, for example have meant a tightening of parking standards. The LDDC generally allowed more parking than the Boroughs, but in the case of Tower Hamlets, the intentions at Canary Wharf continue to be to ensure a mode split which is predominantly public transport.

Other changes in policy

- 3.7.3 It is expected that the revised UDP will take a more specific line on the land uses to be promoted in the different station catchments in the borough. For example, Canary Wharf will continue to be primarily commercial, a mix of commercial and residential will be promoted at Aldgate (resisting the purely commercial spread eastwards of the City), while at Mile End the mix will be primarily residential. At nine other non-interchange stations in the borough, the promoted use will be residential. This will be in accord with the theory of matching land use to public transport accessibility.
- 3.7.4 The approved UDP is not in accord with latest planning guidance with regard to housing. Maximum densities in the plan (247 habitable rooms per hectare) are no longer advocated, and are at odds with both the demand for sites and the policy to maximise the potential of highly accessible sites. The UDP also emphasises family housing, which is not in accord with demand.
- 3.7.5 To help to deal with this and to meet housing capacity targets, the council allows higher density housing in appropriate (accessible) locations. In the absence of a formal policy revision this cannot be insisted upon, but the borough reports that developers in Tower Hamlets

are “switched on” to higher densities and low car provision, so this is not usually a problem.

Canary Wharf

- 3.7.6 Canary Wharf is the only JLE station within the borough, though part of the Canning Town catchment falls within the borough.
- 3.7.7 The planning policy for the Canary Wharf “central area zone” (CAZ) continues to emphasise this location for predominantly commercial development as an alternative to the City of London. There is evidence that the scale and character of development activity and applications has changed since the time of the baseline study. Not only is the Canary Wharf CAZ itself being further built up, but other nearby sites are coming forward for major redevelopment, and at much higher densities than before. Two sites in particular are examined more closely in the case studies report, namely Millenium Quarter, and Wood Wharf.
- 3.7.8 Canary Wharf is the main focus of attention in terms of unravelling the development impact of the JLE. This can be argued since:
- Canary Wharf would not have developed to its present, and certainly not its planned, extent had the JLE not served the area;
 - Other station catchment areas were either already well served by public transport (Westminster, Waterloo, London Bridge, Stratford); or have yet to reveal their power to attract major long-term investment (Canada Water, North Greenwich, Canning Town and West Ham); or are already built to a relatively high density (Southwark and Bermondsey).

The case studies at the end of this report give closer attention to the development impacts near these individual stations, but the point made here is simply that in relative terms, the main impacts are visible at Canary Wharf.

- 3.7.9 Whatever broader development impact the JLE had, the clear conclusion is that it enabled the development of a major commercial centre, and that this could not have occurred in a similar manner without the JLE. This applies not only to the extent of commercial floorspace provided, but also the delivery of a mode split for the journey to work with a public transport share comparable to central London (i.e. in excess of 80%).
- 3.7.10 The planning policy as pursued by the LDDC was clearly dovetailed with the Canary Wharf development scenario. Since the transfer of planning powers to the boroughs, Tower Hamlets has continued the policy of encouraging further significant growth at and around Canary Wharf. Some aspects of policy have changed, for example regarding employment, training, and affordable housing. These are not confined to Canary Wharf, but there is a wish at borough level to try to ensure that

such commercial development areas distribute social and economic benefits more widely than was the case with the early phases.

3.7.11 Table 4.8 shows the assumed development capacity of Canary Wharf with different levels of rail accessibility, as given to the researcher by the Canary Wharf Group. The right hand column shows increments in the total floorspace capacity “unlocked” by increments of rail access capacity.

Table 4.8 Capacity of Canary Wharf with different levels of rail access*

	Employment floorspace capacity
Without JLE	6-7 m sq ft
With present JLE	18-19 m sq ft
With “proper” JLE	22 m sq ft
With Crossrail	35 m sq ft

** Assumes a public transport mode share for the journey to work in the order of 80-90%*

Note: These figures are as presented by the owners of Canary Wharf and they relate only to Canary Wharf itself. Greater capacity increments could presumably be achieved if the wider area of the Isle of Dogs were to be included.

Table 4.9 Summary of Tower Hamlets Policy Changes

UDP questions	Current Plan	Summary of Change June 1998 to March 2002
UDP supports PTOD*?		No revised plan produced in timescale of this review. Changes are reported intentions for the revision.
Station catchments in particular?	Yes	Not yet known
Higher densities allowed/required?	Yes	Not yet known
Density related to accessibility?	Maxima applied	Higher densities allowed, but cannot be required in advance of UDP revision.
Specific uses allowed-promoted?	Broadly, 3 levels identified	Expected to relate density to accessibility in more robust way. Plot ratio likely to be abandoned in favour of design-led approach.
Conditions or obligations for PT?	Broadly	Revised UDP to be more specific about land use mix around stations
Distinguish interchange stations and other stations?	Yes	Yes, access to stations included
Distinguish inbound-outbound?	No	Yes
Special policies for JLE stations?	No	Yes
"Station community" policies	No	Not yet known
Parking standards related to access?	No	Not yet known
Catchments have SPG++ Briefs?	No	Not yet known
Any other JLE station policies?	No	Not yet known, but Millenium Quarter masterplan to be incorporated
	No	Not yet known

3.8 ***Greenwich Policy Review***

- 3.8.1 The current UDP was adopted in November 1994 and pre-dated much of the recent planning guidance. The first deposit draft of the revised UDP was published in February 2002.
- 3.8.2 North Greenwich is the only JLE station in the borough, and the defined catchment of this station includes the entire Greenwich peninsula. This area includes land formerly owned by British Gas (who prepared a masterplan for redevelopment in the mid 1990s), and a strip of sites on the west side that are still in industrial use. The peninsula also accommodates the Blackwall Tunnel approach roads, which divide the industrial area from the remainder of the peninsula where redevelopment has been planned for a decade or more.
- 3.8.3 The planning history of the Greenwich peninsula is complex, and is nowhere set out with a clear and fully referenced chronology. Some of the earlier planning documents mentioned in the baseline study report are now difficult to obtain. This review focuses on more recent documents. Apart from the UDP first deposit draft, further relevant documents are:
- East Greenwich Riverside Draft Development Framework, March 2001;
 - Greenwich Peninsula Planning Statement, March 2001;
- both of which were combined and amended in:*
- The Greenwich peninsula Draft Development Framework (draft Supplementary Planning Guidance), November 2001.

The JLE at North Greenwich

- 3.8.4 Apart from Canary Wharf, the development impact of the JLE is most starkly apparent at North Greenwich. The Millennium Dome, one of the most prominent structures in London, would not have been located at north Greenwich had the JLE not been built, or if it had not served the peninsula. Without the combination of the necessary land and the JLE it is arguable that the Millennium exhibition would have been located in Birmingham rather than London. The JLE was able to provide access for the Dome without heavy reliance on road transport.
- 3.8.5 The Dome and the Millennium Experience within it during 2000, was a controversial project, challenged in terms of its cost, content and concept. But it was nevertheless a major project with a significant impact on the peninsula. The following points reinforce this:

- Site preparation included decontamination which would have been required before any redevelopment;
- The cost of the Dome is put at around £750m, including £185m for the land decontamination, and excluding the costs of post-closure maintenance;
- Employment generated by the Dome and the Millennium Village has been estimated at 7,000 jobs including construction, though of course it is expected that most of these will have disappeared, with only site security and maintenance jobs left;
- The Dome attracted 6.5 million visitors during 2000, making it the most-visited paying attraction in the UK.

3.8.6 While it is clear that the Dome would not have gone ahead without the JLE, a further question is whether redevelopment of the Greenwich peninsular would have gone ahead any more quickly without the Dome. (A masterplan had already been prepared for the area for the former owners, British Gas.) On the one hand the Dome was the catalyst for site preparation, transport infrastructure (the bus-rail interchange, the guided busway to Charlton, local access roads) and landscaping of formerly derelict areas. It might have been difficult to generate the impetus for these major works without the kick-start provided by the Dome project.

3.8.7 On the other hand it can be argued that the Dome project has delayed redevelopment on the peninsular in a number of ways:

- The Dome has occupied a third of the total redevelopment area since 1998;
- Its continued presence (supported by the borough council) limits other options for redevelopment of the site;
- The form and use of other redevelopment sites on the peninsular will remain uncertain until the future use of the Dome (or its site) is finalised;
- Responsibility for deciding the future of the Dome rests with the Government, which means effectively that the borough council is unable to proceed with implementation of the development framework. The draft framework says, “The Council will require the retention of the Dome”, yet the Council has no power to require this.

The development framework

3.8.8 The revised UDP continues the basic policy for the development of the Greenwich peninsular that was established earlier and reported in the baseline study, namely the intended development of the eastern peninsular for mixed uses. Included in the mix would be:

- A “central business area” around the JLE station with predominantly commercial activity, bringing significant employment;
- The Dome as a major attractor, regardless of its eventual use (expected to be a major sport and leisure venue);
- Delta wharf (currently an aggregates wharf) within a few minutes walk of the station. It is designated in the revised UDP for mixed use development, with employment generating uses predominating.
- The Millennium Village (at the south eastern end of the peninsular) is partially built with completion due in 2006;
- The remainder of the English Partnerships’ masterplan site (between the Dome and the Millennium Village) is seen as having potential for employment led development with a residential component, with other uses such as a hotel and live-work spaces and ancillary retail.

Office and commercial development policy

- 3.8.9 Although no significant policy change has occurred since the baseline study, it is worth emphasising the importance of the policy encouragement being given to office and other commercial development at North Greenwich. While this for the time being remains an aspiration, it is a relatively new one for the Borough of Greenwich. The baseline report states that the UDP contains “no plot ratio standards for commercial development, reflecting the lack of pressure for high density office accommodation”. This continues to be the case in Greenwich, and in Woolwich, for example, the pressure is more for the conversion of offices to residential.
- 3.8.10 Thus the JLE presence at North Greenwich has had a significant impact on policy and the aspirations that lie behind the policy to encourage office development.
- 3.8.11 From discussions with borough planning officers and examination of the planning documents for the Greenwich Peninsular, it seems that the intended office and commercial development is neither expected nor intended to rival Canary Wharf in character or scale, although the revised UDP does not express the policy in these terms.

Residential development policy

- 3.8.12 Higher residential density development is envisaged in more accessible areas. The revised UDP still contains (unlike some other revised UDPs) maximum density criteria for housing. The adopted UDP included the highest densities in riverside locations (up to 295 habitable rooms per acre). The revised document allows higher density in riverside locations (up to 350 habitable rooms per acre), but adds the proviso that the site

must have good public transport accessibility. The northern portion of the Greenwich peninsular, close to North Greenwich station would clearly meet this criterion.

- 3.8.13 An accessibility standard is applied to new housing development, of 400 metres maximum from bus services, and 800 metres maximum from rail stations. On this basis, the catchment of North Greenwich would be no more than half the area defined in the baseline study.

Other transport impacts and influences

- 3.8.14 The JLE has created a high degree of accessibility by public transport at north Greenwich, especially when the interchange with bus routes linking other parts of the borough is taken into account. The revised UDP sets out further public transport improvements that are required to facilitate the redevelopment of the peninsular. These include better bus links to the south of the borough, and the creation of a “Waterfront Transit” system incorporating the existing busway along the peninsular.
- 3.8.15 The revised UDP still talks of a lack of river crossing opportunities, despite the JLE and the DLR extension to Greenwich and Lewisham. The Plan supports (policy M6) the Crossrail project, but offers no view on the route through the borough, or whether it should serve the peninsular. This would clearly have an enormous impact on the relative accessibility of north Greenwich.
- 3.8.16 “Serious concerns” are expressed in the Draft Development Framework (though not in the revised UDP) about the JLE reaching its capacity at peak hours. Further increases in public transport capacity are therefore seen as required in order to serve the scale of development proposed.
- 3.8.17 This raises the question as to whether the JLE with its current carrying capacity is capable of generating positive development interest, especially with regard to employment-related uses which (unlike the leisure use of the Dome) rely on peak hour accessibility.

A new road river crossing?

- 3.8.18 There are proposals for a new road crossing of the river between north Greenwich and Silvertown, and land is safeguarded in the plan for this. The consultation draft of the Development Framework does not ask about the need for or impact of this road link; it asks only whether it should take the form of a bridge or a tunnel.
- 3.8.19 This link would enable buses to run north from the JLE as well as south, but would also open up access by car for a direction that so far is served only by the JLE. The UDP does not say how this would benefit the peninsular.

Roads more important than rail in Greenwich?

- 3.8.20 Apart from the Dome, most of the development on the peninsular has occurred on the sites furthest away from North Greenwich station. This includes a large Sainsbury's, a multi-screen cinema, a Holiday Inn Express hotel. Although within the JLE catchment as defined in the study, these non-residential developments have little to do with accessibility via the JLE, and everything to do with road access and ample parking. These are essentially out-of-town style developments, in terms of design, access and function.
- 3.8.21 This raises the issue of the relative impact of improved accessibility by public transport or by private road transport. In suburban locations (such as much of Greenwich) developing in a way that shifts the balance of accessibility towards public transport, walking and cycling requires not only designing in such a way that that can occur, but also clamping down on development that is not accessible by these modes, and which relies heavily on access by car.
- 3.8.22 The development pressures on the peninsular illustrate this point very clearly. The first and significant developer interest has been in car-oriented development that is inconveniently served by other modes. Having allowed this development, interest in public-transport oriented development appears to be weak.
- 3.8.23 The Borough is promoting further public transport on the peninsular in the form of "Greenwich Waterfront Transit" scheme, which would help to strengthen the public transport offer. On the other hand proposals for a new road crossing between North Greenwich and Silvertown (included in the Mayor's strategy) will strengthen the offer for private car access. The balance of accessibility on the peninsular and its relationship with the type of development that may be attracted is perhaps an issue that could be addressed.

Parking – the killer clause

- 3.8.24 The critical element in this is parking. The revised UDP has adopted the maximum standards included in RPG3/RPG9. Two maxima are put forward for employment generating uses, one for inner London, and a more generous maximum for outer London. The Greenwich UDP has adopted the outer London maxima, except for Greenwich town centre. Policy M11 does say that, following the production of an accessibility map, reduced parking will be "enabled" where "access by alternatives to the car are (sic) plentiful..." But added to this is the proviso "...and where the economy of the area will not be adversely affected."
- 3.8.25 This is effectively saying to potential developers in North Greenwich: 'we might ask you for lower parking near the JLE station, but not if it means that you might lose interest in developing there.' In any case, the attempt to reduce provision in accessible locations is undermined by the

more lax standards at other locations in the borough to which developer interest may easily migrate.

3.8.26 In this respect at least, the impact of the JLE on development policy in Greenwich is hard to discern.

Table 4.10 Summary of Greenwich Policy Changes

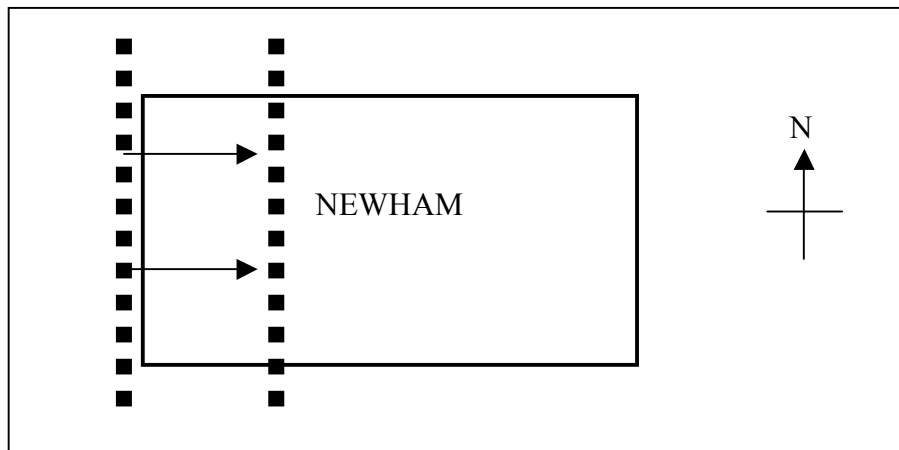
UDP questions	Current Plan	Summary of Change June 1998 to March 2002
UDP supports PTOD*?	Yes	No change
Station catchments in particular?	No	Yes
Higher densities allowed/required?	No in relation to access	Good public transport access now required for higher densities
Density related to accessibility?	General	Public transport accessibility map to be used when prepared
Specific uses allowed-promoted?	Possible office to replace industry at NG	Mixed use designation rather than zoned areas for different uses. Off street parking no longer required at interchange stations.
Conditions or obligations for PT?	General	No mention in development framework. General provision in revised UDP.
Distinguish interchange stations and other stations?	Yes	No change; North Greenwich promoted as interchange
Distinguish inbound-outbound?	General	No change
Special policies for JLE stations?	Policy to promote interchange at NG	No change
"Station community" policies	Not explicit	No change
Parking standards related to access?	General	In general terms only
Catchments have SPG++ Briefs?	Yes	Yes planning framework for North Greenwich
Any other JLE station policies?	No	No change

3.9 *Newham Policy Review*

- 3.9.1 The UDP examined in the baseline study was adopted in June 1997. This study reviews the changes in the revised UDP adopted by the L B Newham council four years later in November 2001, though this was not published until January 2002.
- 3.9.2 The UDP is now seen as the top of a three-tier hierarchy of planning policy documents.
- 1 Newham UDP, January 2002;
 - 2 The second tier (with regard to the JLE corridor) comprises the Lower Lea Valley Draft Planning Framework published in November 2000;
 - 3 Below this there is or will be a number of development frameworks or briefs for specific areas or development nodes. Each of the JLE station catchments in Newham (Canning Town, West Ham and Stratford) has been identified as a potential development node, and each will have its own more detailed masterplan or development brief.
- 3.9.3 The UDP picks up on national and regional planning guidance, and the regeneration agenda in particular, emphasising Newham's position at the "pivot" of the Lower Lea Valley and Thames Gateway regeneration areas, and "at the centre of East London's Development Focus". (UDP Introduction)
- 3.9.4 A general view from Newham is that the opening of the JLE stations has brought the City and West End nearer, and created inner London levels of accessibility to what was formerly seen as part of outer London. Newham used to be seen as falling entirely within outer London (with the boundary of inner London along the Tower Hamlets border). Now, the perception is that the inner London boundary has shifted to the east, and that the JLE catchments are in effect in inner London. (See Figure below)

Figure 4.1 Concept of JLE moving the central London boundary eastwards

The JLE corridor and Lower Lea Valley lie between the two broken lines.



What are the main changes in UDP policy since 1997?

3.9.5 The main changes affecting development in relation to the JLE are:

- 1 The revised UDP is more supportive of increased development activity within station catchments, and includes specific station catchment policies.
- 2 The plan now has a location policy based on public transport access. The planning framework has therefore changed dramatically as a result of the JLE stations.
- 3 Higher density development is now generally required, rather than being allowed as an exception.

3.9.6 These changes should be seen in the context of a generally more proactive approach to shaping development in the Borough to meet social, economic and environmental objectives, summarised below:

- 1 A more holistic or strategic approach, providing a direction and vision for future development, not just site by site responses as before;
- 2 The UDP stands at the top of a hierarchy of plans and guidance which aims to create regeneration based on public transport accessibility, quality of development and social objectives;

- 3 The latter (social objectives) are leading to the breaking down of dominance of social rented housing tenure, through PFI for rehabilitation and redevelopment of council housing, which will include affordable provision through housing associations or contractors. This action will be particularly evident within the West Ham catchment area.
- 4 There is a hierarchy of density and mixed uses promoted, with the most intensive at key interchanges (Stratford and Canning Town), and lesser intensity (though still more than general) around the other stations in the Borough (see map from draft housing SPG at the end of this sub section). Non-residential development, offices, retail and hotels are promoted at main nodes, with intensity related to public transport access. Other employment such as distribution warehousing is promoted outside station catchments. An example is the planned relocation of Parcel Force at West Ham to release the site adjacent to the station.

Specific policies in relation to public transport accessibility

3.9.7 A number of terms are found in Newham planning documents related to areas that are either regarded as more accessible by public transport, or are related to road accessibility, or are thought suitable for focusing development efforts. It is not easy to identify exactly which policies fit with which type of area, but generally public transport accessibility is more closely involved with planning policy than it was in the 1997 version of the plan. The types of areas identified include:

- The “Arc of Opportunity”; and
- Major Opportunity Zones, within which there are;
- Priority Development Nodes; and
- Gateway locations.

In addition there are:

- Designated Centres; and
- Town centres.

3.9.8 Regeneration led policies identify an “arc of opportunity” (which includes the Lower Lea valley and the Royal Docks as far as Beckton) and focus on higher density mixed use development within station catchment areas. However, there are less accessible locations within this arc that are also flagged for high density and mixed use, such as Albert Dock Basin and Beckton Gateway. The borough wants to “tie these back into the transport network” and envisages new public transport provision in the Beckton area, possibly a light transit facility.

- 3.9.9 Three “Priority Development Nodes” (PDN) have been identified at the three JLE stations – Stratford, West Ham and Canning Town. Stratford and Canning Town are regarded as more significant transport interchanges and are additionally identified as “Major Opportunity Zones” (MOZ). Office, leisure, and retail opportunities are now all mentioned as appropriate for the MOZs.
- 3.9.10 West Silvertown is also identified as a Priority Development Node. This falls within the catchment of Canning Town station as defined in the baseline study, but lies outside the walking catchment, except possibly for residential development. Walking time from the centre of West Silvertown is about 20 minutes, and much of the walk is unpleasant if not dangerous.
- 3.9.11 Two other PDNs have been identified at the “Royal Albert Dock Basin” and “Beckton Gateway”. These are currently poorly served by public transport, though there are proposals for a new “East London Transit” system linking these areas with North Woolwich (to meet the proposed DLR extension) and Barking. In addition, the Crossrail scheme is planned to include a new station in the Royal Docks.
- 3.9.12 Residential development is also regarded as important. Significant emphasis is given to the provision of affordable housing, and there is resistance to the emergence of regeneration based only on speculative high cost housing for people coming into the area. "We don't want to do another Isle of Dogs." Affordable housing is therefore promoted in the arc of opportunity. The borough requires 15% of social rented, and 15% of equity share housing – to allow people choice. The principal is that if they want to live there they can; if they want to move elsewhere in the borough then the finance is available to provide it.
- 3.9.13 Densities and land uses are now more explicitly related to accessibility through the focus on development at public transport nodes and established centres which tend to be the focus for public transport provision. However, accessibility levels have not been defined in the plan, and the policy is not fully articulated. The plan states that further refinement will emerge as local development frameworks are produced. The Figure at the end of this section reproduced from the Lower Lea Valley draft planning framework, illustrates the difference between the catchments - higher densities are envisaged within 500 metres of West Ham station, 800 metres of Canning Town and 1000 metres of Stratford.

Parking policy

- 3.9.14 The revised UDP contains parking standards that are not always consistent with policy guidance. While maximum standards are set for non-residential development, the PPG3 maximum for residential development (average of no more than 1.5 spaces per dwelling)

apparently is ignored. Not only do the standards provide for much higher levels of provision, outside the centres they are not even established as maxima. In these circumstances it may be difficult for the borough to achieve its traffic restraint, design and density objectives.

- 3.9.15 For non-residential development the principle is established that parking standards should be more restrictive in the established centres, with separate (lower) maximum standards. However, no standard is given for food retail, while the non-food retail maximum varies widely between centres and elsewhere, and both such policies are likely to undermine attempts to focus development in centres or at the PDNs.

Regeneration prospects

- 3.9.16 Newham has set out its vision for the regeneration of the Borough, and the challenge is to bring about its achievement. The opportunity is there for major development, and the borough has an estimated 400 hectares (1000 acres) of what it describes as “prime development land”. Planning policy goes only so far, and must be accompanied by active interest by property developers, either as a result of property market forces, or as a result of incentives, funding or support from government sources. So far there is an apparent gap between the borough’s aspirations and the willingness of the development industry to meet them.
- 3.9.17 If there were strong pressures for development in Newham, as at Canary Wharf, planning policy could be brought to bear to shape development schemes. But Newham, so far at least, does not generally experience such pressures. Therefore under the current system, regeneration funding and initiatives are important to complement planning policy. Newham benefits from a wide range of national and European funding programmes to assist in regeneration in the JLE corridor (and elsewhere in the borough), such as:
- SRB programmes for Stratford and Canning Town;
 - New Deal for Communities funding at West Ham;
 - Objective 2 status (ERDF) for most of the borough.

- 3.9.18 The weakness of the UDP is evident from the wording. For example the Introduction includes the following (our emphasis):

“The UDP *seeks* development...*supports* regeneration of its established retail centres...It is *expected* that new large retail and leisure developments will locate in the borough’s existing centres, as these tend to be the focus of public transport.... The UDP *promotes* high quality development...”

Similarly, the Lower Lea Valley development framework identifies four ways of providing for necessary infrastructure, three of which depend on

the ability to negotiate benefits from developers, which in turn depend on an adequate development surplus (whereas many sites in Newham have considerable costs that have to be met before development can go ahead):

- Direct provision of infrastructure as part of development schemes;
- Conditions attached to planning permissions;
- Planning obligations (s106 agreements) attached to planning permissions;
- Direct provision by bidding for U.K. Government and European funds.

The last of these is independent of, and indeed is a response to, “abnormal” development costs.

Shift in development pressure and/or activity

- 3.9.19 There has not been any burgeoning increase in development interest near the JLE stations in Newham, but the case study updates reveal more detail. Stratford has seen the most intense development interest, but it was already highly accessible by public transport, and has an improved bus interchange and an awaited new international rail station. The cumulative increases in public transport, however, have been an important explanatory factor in increased development interest at Stratford, with each successive increase adding to the image and appeal of the area for property investors. In particular, the arrival of the JLE was an important factor in the decision to include an international station at Stratford on the Channel Tunnel Rail Link. This has led to major schemes coming forward (see 4.9.26 below).
- 3.9.20 The Borough is now trying to negotiate higher density mixed use development within the other station catchments (West Ham and Canning Town). This is not always in line with what developers want – see case studies. It is not yet clear whether developers actually want to develop more intensively within station catchments. There seems to be strong interest in a business park in the Royal Docks, but this site is not within the JLE catchment. This means caution is required in examining the impact of the JLE on development activity. It does not, however, undermine the notion of the JLE having a significant influence on policy.
- 3.9.21 Additional case study sites were considered. However, because most of the case study sites in Newham in the baseline study have not yet been developed or decided, an updating of the previous case studies provides an adequate indication of the JLE impact.
- 3.9.22 Some further commentary is offered below on the planning position within the three JLE catchments in Newham.

Stratford

- 3.9.23 Stratford is argued to be the most accessible town centre in the country. In the UDP a Major Opportunity Zone is identified at Stratford Rail Lands (MOZ1) with 100 hectares of developable land.
- 3.9.24 The aim is for development which is appropriate for Stratford's key position in East London and local, national and (future) international public transport links. This means mainly employment generating uses but also enhanced shopping, leisure and cultural facilities and residential. Schemes are expected to "ensure that the key means of access would be public transport" (UDP MOZ1). However, no specific mention is made of the JLE as distinct from other forms of public transport.
- 3.9.25 There are further development opportunities at Stratford besides the railway lands. The policy provisions will apply to the area as a whole. An example is a proposal by Chelsfield for 1 ¼ m sq ft of retail, offices, and residential. An Ibis hotel is perhaps an early indication of a raised profile for Stratford beyond its role as a service centre for inner east London.
- 3.9.26 The baseline JLE study included no case study sites within the Stratford catchment. Given the difficulty of separating JLE from other accessibility impacts at Stratford, given the anticipation of the arrival of international services, no additional sites have been included in this study. By the time this study was completed, a developer was negotiating with Newham Council for a £3.5 billion scheme, involving the generation of 30,000 jobs and over 5,000 new homes.

West Ham

- 3.9.27 A new stop at West Ham on the Fenchurch Street (London, Tilbury and Southend) line provides extra interchange opportunities with the JLE, DLR and District Line. Even so, the JLE is probably a more significant addition to public transport accessibility in terms of potential for producing a development impact.
- 3.9.28 The area has a lot of development potential in terms of vacant or underused land, but a lot of site preparation and local access improvement is required to bring sites into use. An example of action on this front is a new road with associated new development at Rick Roberts Way.
- 3.9.29 The potential at West Ham is recognised in the UDP with all or part of five MOZs falling within the station catchment area (MOZ 2, 3, 4, 5 and part of 6). Parts of these MOZs are represented in the case study sites identified in the baseline study, and updated in this report. The UDP makes specific reference to maximising the accessibility potential of

West Ham station. MOZ 4 effectively is the West Ham station area and is a Priority Development Node. There is a policy (UDP UR25) for office or other employment mixed with residential and possibly a local centre related to the station and to existing communities.

- 3.9.30 Apart from employment and mixed use regeneration aims for these areas, the surrounding area has a lot of poor council housing in need of attention. There is a PFI for rehabilitation of the council housing stock, and the extra densities and mixed use being promoted (in line with accessibility) is expected to pay for the rehabilitation work.

Canning Town

- 3.9.31 The Canning Town catchment identified in the baseline study extends well beyond the walking catchment in the east/south-east direction, with the implication that users of the JLE in this area would access the station by bus or other means. While an extension of the DLR to Silvertown and London City airport will create a more robust feeder service for Canning Town (as it has on the south portion of the Canary Wharf catchment), this is still in the planning stage and received approval only in March 2002. It is therefore unreasonable to attribute any development impacts to this facility. An issue therefore is whether development impacts outside the walking catchment have any relevance to the JLE. Further commentary on this is provided in the case study update section of this report.

Canning Town Centre

- 3.9.32 At Canning Town itself a study has been undertaken (by consultancy EDAW) of mixed use development. There are a range of sites, some of which are included in the case study section. MOZ 6 is partly within the Priority Development Node around the station, and this is planned for a “high quality flagship development” that is integrated with the town centre. There are sites that are not within MOZ designation for mixed use, employment and retail developments.
- 3.9.33 There is developer interest and Sainsburys will probably be the first significant development. The borough is seeking a partnership approach to carry development of the area forward.

West Silvertown (Within defined Canning Town catchment)

- 3.9.34 Much of the area is included in MOZ 10, and is also identified in the UDP as a Priority Development Node. Until recently sites have been developed on an ad hoc basis. Now the intention is to achieve a more planned approach. LB Newham and the London Development Agency are the main landowners and are keen to develop a focus for the Royal

Docks. The aim in the UDP is for the creation of a “vibrant and dynamic city district” with a strong mix of land uses.

- 3.9.35 This area has other attributes that are likely to prompt development to a stronger extent than the availability of the JLE 20 minutes walk distance. These include the City Airport, the recently created and widely acclaimed Thames Barrier Park, and the waterscape provided by the Royal Victoria Dock. There is the prospect of the DLR extension, but also the possibility of a Silvertown road bridge or tunnel linking to the North Greenwich peninsular (see section on L B Greenwich).

Documents

- 3.9.36 The Borough of Newham is working to a hierarchy of policy documents that will influence decisions about particular areas or sites. These are:

1. UDP revised and adopted (published January 2002)
2. Lower Lea Valley framework (area regeneration study)
3. Major Opportunity Zones (MOZ) frameworks

Stratford Railway Lands

Stratford Market/Union Street

West Ham Mills

Canning Town Action Plan

Masterplans for railway lands at Stratford

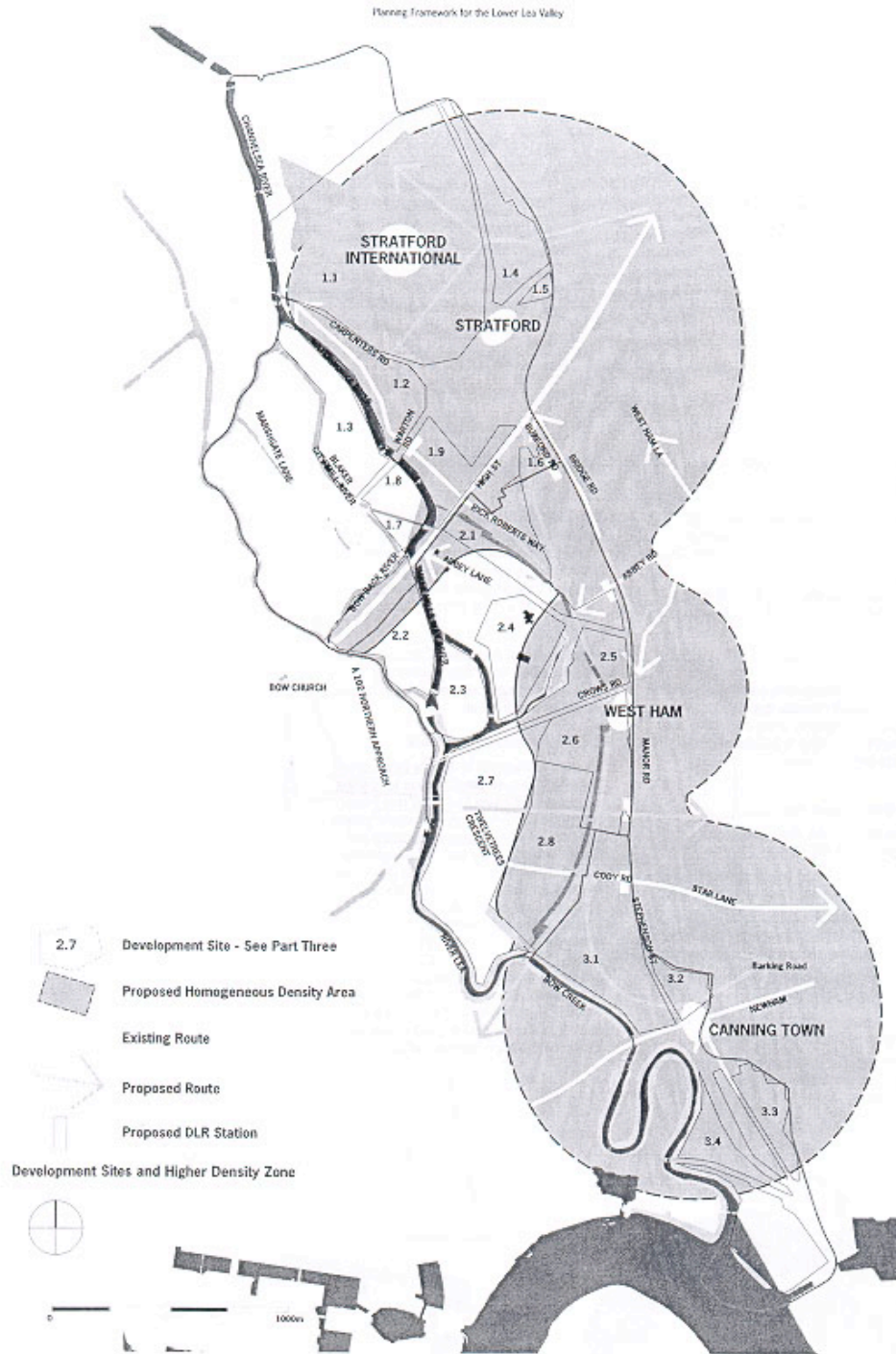
Silvertown Urban Framework Plan

4. Guidance on particular topics, including for residential which shows accessible locations suitable for higher densities.

Table 4.11 Summary of Newham Policy Changes

UDP questions	1997 Plan	Summary of Change June 1998 to January 2002
UDP supports PTOD*?	General	Stronger support
Station catchments in particular?	Yes	More explicit with named locations
Higher densities allowed/required?	Allowed	Required
Density related to accessibility?	General	More definition
Specific uses allowed-promoted?	Allowed	Promoted
Conditions or obligations for PT?	General	General, but mentioning public transport infrastructure
Distinguish interchange stations and other stations?	No	Reflected in different policies at each station
Distinguish inbound-outbound?	Not explicit	Not explicit
Special policies for JLE stations?	No	No change
"Station community" policies	No	Not as such, but development briefs to be produced for development nodes
Parking standards related to access?	No	More so
Catchments have SPG++ Briefs?	No	Yes
Any other JLE station policies?	No	No change

Figure 4.2 Development Sites and Higher Density Zones; JLE stations



4 *Development demand - the LDMS Database*

4.1 *Planning Application Analysis*

4.1.1 The purpose of this section is to analyse planning application data as a means of judging the demand for development. The analysis is based on data held in the London Development Monitoring System (LDMS), which contains data on planning applications relating to larger developments.

4.1.2 The basis of this analysis is to examine whether and to what extent development demand has responded to the increased accessibility provided by the JLE. The following questions are pertinent to the investigation:

- Has development demand changed since the opening of JLE?
- If so in what ways?
- How do any changes compare to areas not served by the JLE?
- Two further questions are relevant and are addressed in the case studies and in the spatial analysis sections:
- What role if any has the JLE played in any change?
- What other factors have affected changes in demand?

4.1.3 The LDMS data base data for 1990 - 2001 has been used in this study. The data is supplied by the London Boroughs on a voluntary basis. As a consequence it is difficult to ensure that the data are fully comprehensive, and of a consistent style. Nevertheless, the database is considered to be sufficiently robust to allow analysis at the level undertaken for this study.

Areas Analysed

4.1.4 Data has been collated for three basic areas, or sets of areas:

- 1 The **JLE station catchment areas** as defined in the baseline study, from Westminster to Stratford inclusive;
- 2 The **Central Statistical Area (CSA)**: a reference area for those catchments falling within or near central London (Westminster to London Bridge and part of Bermondsey). The CSA reference area excludes JLE catchments within the CSA;
- 3 The **Inner East London Area (IELA)**: a reference area for the catchments falling outside central London (Most of Bermondsey and stations from there to Stratford). The IELA reference area excludes JLE catchments within the IELA.

4.1.5 The analysis of the JLE corridor itself is related to two further areas:

1 **CORA**

The “Core Area” including all station catchments Waterloo to Stratford (i.e. the JLE catchments excluding Westminster);

2 **MIA**

The "Major Impact Area" from Bermondsey to West Ham. It should be noted that West Ham has been added to MIA since the baseline study since there is considerable development potential within its catchment identified in the revised Newham UDP.

4.1.6 While the overall analysis from this study has moved towards individual catchments or groups of catchments, the LDMS analysis remains at a more aggregate level in view of the need to preserve reasonable data volumes.

Catchments

4.1.7 The catchments defined in the baseline study are fairly broad, especially in the MIA. Following the conclusions from the literature review, it is acknowledged that some of the catchments are somewhat too generous especially for non-residential development. The wider catchments are reasonable for residential development, provided that one accepts the role of feeder public transport services to the nearest JLE station. The catchments which extend well beyond 500 meters are:

- Canada Water – feeder buses and East London Line
- Canary Wharf – feeder buses and DLR
- North Greenwich – Feeder buses
- Canning Town – Feeder buses and DLR

4.1.8 Despite this reservation the original baseline study catchments were used for the analysis. A sub-set analysis of the data was considered for tighter catchments of 400 metres for non-residential development demand. However, this limited the sample sizes to a point where statistical analysis was not appropriate. Consequently, this issue is dealt with instead in the geographical analysis and case study sections of the report.

4.1.9 It could be argued that if feeder services are included as enabling wider catchment areas to be defined, then such wider catchments could have been defined for some of the other JLE stations. It was felt, however, that for the sake of consistency, all catchment areas defined in the baseline should remain unchanged.

4.2 Residential development applications

4.2.1 As expected, residential development in all of the areas under study accounts for the bulk of all development demand, as measured by the number of

planning applications received. Applications for single-use residential were about 80% in CORA, and 88% in the rest of IELA over the 10 year period 1991-2000. Moreover, the majority of other applications were for mixed-use development which included residential either as the main or as a subsidiary use. The proportion of applications for development that included no residential component was relatively small, 5 - 10% in both CORA and IELA.

4.2.2 A consequence of this is that statistical analysis is most useful for residential applications; data for other uses must be treated with caution.

4.2.3 The table below shows the total single use residential applications received in CORA (i.e. all JLE catchments excluding Westminster) in the 10-year study period. The average number of applications per annum received prior to JLE authorisation (1991-1993) was 30. In the years following authorisation (1993-2000) the annual average increased to 51, a 70% increase.

4.2.4 During this period Canary Wharf had the largest number of applications, 23% of the total in CORA, while Bermondsey had the second highest number, 21% of the total.

Table 5.1 Residential applications received in CORA*

Corridor	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	Total
Bermondsey	3	5	12	11	5	13	8	12	8	7	84
Canada Water	4	2	12	6	16	12	6	1	3	6	68
Canary Wharf	4	3	8	9	16	22	20	5	9	7	103
Canning Town	1	2		3	1	1	2	5	4	7	26
London Bridge		1	3	3	6	2	15	11	15	16	72
North Greenwich	2	2					2	2	2		10
Southwark	4	3	3	1	6	7	10	2	2	5	43
Stratford	2		1	2	3	3	1	1	1	3	17
Waterloo			1	1	2		4				8
West Ham	1	6	6	1	2				2	1	19
Total CORA	21	24	46	37	57	60	68	39	46	52	450
Total IELA	192	220	294	256	265	288	314	303	284	267	2683
CORA as % of IELA	11	11	15	14	21	21	22	13	16	19	17

* All single use residential applications received, regardless of outcome

4.2.5 A necessary condition before this increase can be attributed to the JLE, is that the increase was greater in CORA than in the rest of the IELA. The table below shows the equivalent data for the IELA (excluding CORA). The annual average in the rest of IELA was 205 applications received prior to JLE authorisation, and 231 afterwards, an increase of 13%. Thus while planning application activity increased throughout the IELA, the increase was far greater in the JLE corridor. This supports but does not prove the conclusion that the JLE had a positive impact on interest in residential development. The differential rate of increase could be due to other factors such as sites

becoming available in the JLE corridor faster than in the rest of ILEA. We have no data to explore this further.

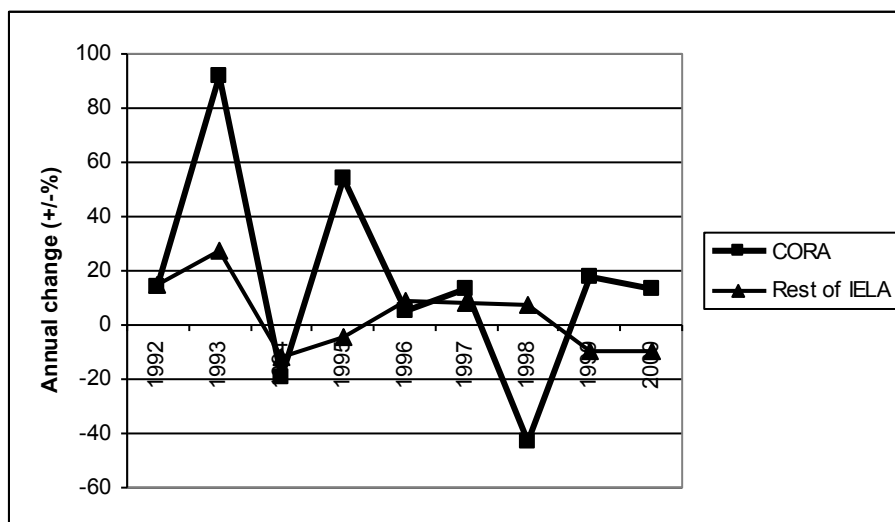
Table 5.2 Residential applications received in IELA*

1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
171	196	249	219	210	228	246	264	238	215
Annual Average 205			Annual Average 231						

* All single use residential applications received, regardless of outcome

4.2.6 The rate of growth of residential planning applications is another potentially useful measure of development demand. The figure below compares the rate of growth in the IELA and CORA. Not surprisingly the much larger IELA is subject to less annual fluctuation than CORA. With the sole exception of 1997-1998, CORA displayed rates of growth that were higher than in the rest of the IELA, and this could point to a positive JLE effect. The dip in residential applications in 1998 contrasts with the very large number of dwellings under construction or complete in that year (see below). Could it be that the flurry of construction in 1997-1998 meant that there was less capacity in the industry for the planning of new schemes?

Figure 5.1 Rate of growth of residential planning applications



4.3 *Volume of residential development*

4.3.1 For this analysis we look at the number of dwellings proposed in the residential applications received, and then at the number of dwellings started.

First, the dwellings proposed by year of application received is shown in the table below. This excludes applications that were withdrawn or superseded, but includes those that had not proceeded to a development start by the end of 2001. This therefore includes where development had been approved but not begun, or where the application was refused or not determined.

Table 5.3 Dwellings proposed by year of application in CORA

Corridor	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	Total
Waterloo	0	0	141	411	180	0	415	0	0	0	1147
Southwark	176	39	51	11	118	227	388	236	76	106	1428
London Bridge	0	0	39	138	150	60	226	251	440	210	1514
Bermondsey	139	114	236	388	85	474	289	550	254	104	2633
Canada Water	237	30	555	318	342	466	157	42	141	876	3072
Canary Wharf	626	141	178	333	799	1586	1393	693	172	1257	7160
North Greenwich	34	30	0	0	0	0	39	1151	286	0	1540
Canning Town	0	48	0	869	90	500	665	525	110	317	3124
West Ham	30	328	110	12	39	0	0	0	120	32	671
Stratford	32		352	37	35	41	16	23	20	285	841
Total CORA	1274	730	1662	2517	1838	3354	3588	3471	1619	3187	23130
Rest of IELA	4817	5218	8099	7064	6880	7424	9202	8368	8233	7166	72471

4.3.2 The table below shows dwellings by year that the application was made (as above), but includes only those where construction was started by the end of 2001. This shows a substantial increase in demand in the years following JLE authorisation, which continued up to 1999. Comparison with the data for IELA as a whole shows that there was a disproportionate increase in demand in CORA during this period. At no time since 1993 has the proportion of dwellings applied dropped below those seen before 1993. The fall off in demand in CORA recorded in 2000 is not as dramatic as the fall off in demand in IELA. All of this suggests a strong positive impact of the JLE.

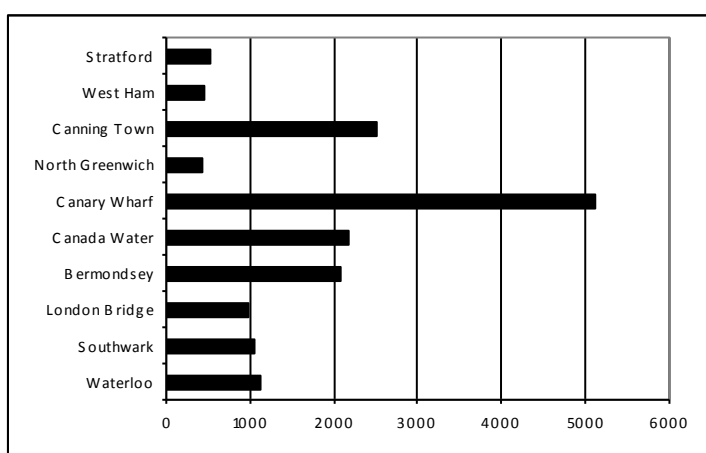
Table 5.4 Dwellings started in CORA and IELA by year application received

Corridor	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	Total
Waterloo	0	0	141	411	180	0	387	0	0	0		1119
Southwark	148	29	51	11	31	95	344	236	66	46		1057
London Bridge	0	0	39	138	150	60	127	219	198	50		981
Bermondsey	139	71	236	376	85	369	89	528	156	26		2075
Canada Water	237	30	555	318	250	448	143	42	141	14		2178
Canary Wharf	0	141	178	333	781	1586	1084	514	81	420		5118
North Greenwich	0	18	0	0	0	0	39	90	286	0		433
Canning Town	0	48	0	869	90	500	665	295	20	21		2508
West Ham	30	307	59	12	39	0	0	0	0	0		447
Stratford	32	0	352	14	35	41	0	23	20	17		534
Total CORA	586	644	1611	2482	1641	3099	2878	1947	968	594		16450
As % of all IELA	17	13	18	30	22	34	28	26	18	40		24

Note: Applications received data do not include 2001

4.3.3 The Figure below shows the totals for the ten-year period 1991-2000. The dominance of Canary Wharf and Canning Town is somewhat misleading because most of the new dwellings were in parts of the catchments that are beyond 500 metres from the station. The same is true of much of the development in the Canada Water catchment. If this is taken into account, Bermondsey assumes much greater important.

Figure 5.2 Dwellings started/completed 1991-2000 by catchment



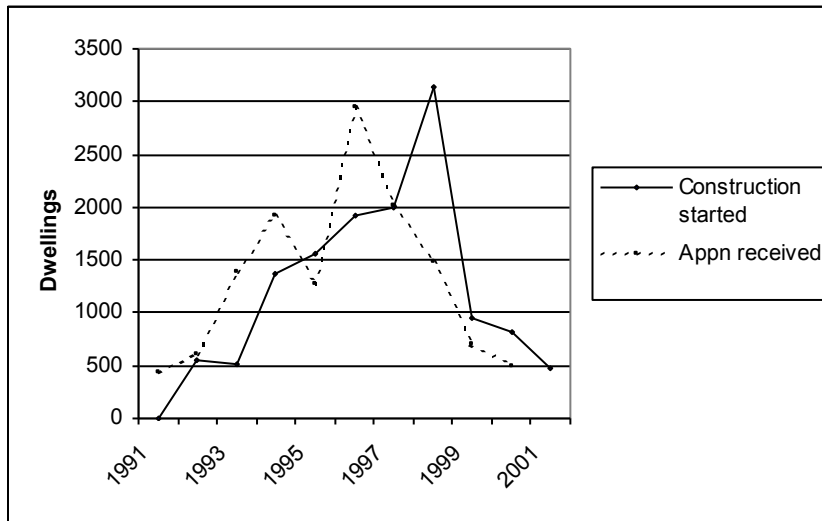
4.3.4 The table below shows the data by the year in which construction started. The two sets of data are compared in the Figure below. This indicated a relatively short period between applications received and construction getting under way, and this in turn indicates strong demand.

Table 5.5 Dwellings started in CORA and IELA by year construction started

Corridor	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	Total
Waterloo	0	0	0	0	411	141	10	557	0	0	0	1119
Southwark	0	116	78	33	12	10	259	123	130	296	0	1057
London Bridge	0	0	0	130	122	60	60	115	210	219	65	981
Bermondsey	0	139	36	299	206	269	115	690	165	144	12	2075
Canada Water	0	267	27	769	193	152	398	146	42	170	14	2178
Canary Wharf	0	0	113	140	816	681	1331	1056	528	453	0	5118
North Greenwich	0	0	18	0	0	0	0	39	190	0	186	433
Canning Town	0	38	10	0	99	770	105	1200	0	20	266	2508
West Ham	0	78	308	10	32	19	0	0	0	0	0	447
Stratford	0	32	0	144	220	27	51	0	23	37	0	534
Total CORA	0	554	512	1362	1566	1918	2000	3131	948	824	478	13293
Rest of IELA	674	2846	3703	6088	4863	5539	6987	4860	7514	5850	2140	51064

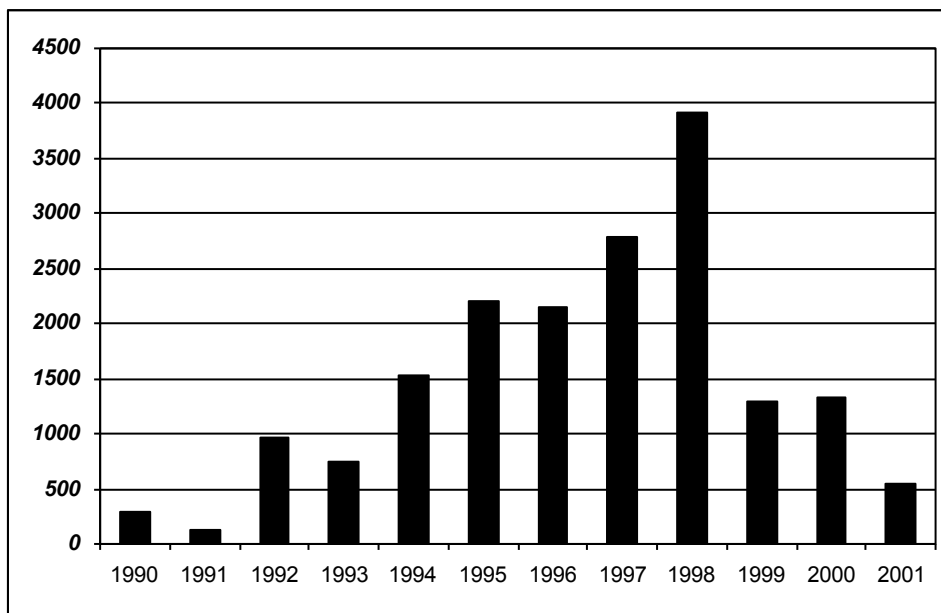
Note: Construction started data include 2001

Figure 5.3 Dwellings started in CORA and IELA by year application received and year construction started



4.3.5 In the five years following JLE authorisation, the number of new dwellings greatly increased, reaching a peak in 1998 that was 4-5 times greater than the two years prior to authorisation.²⁹

Figure 5.4 Dwellings by year construction started – CORA

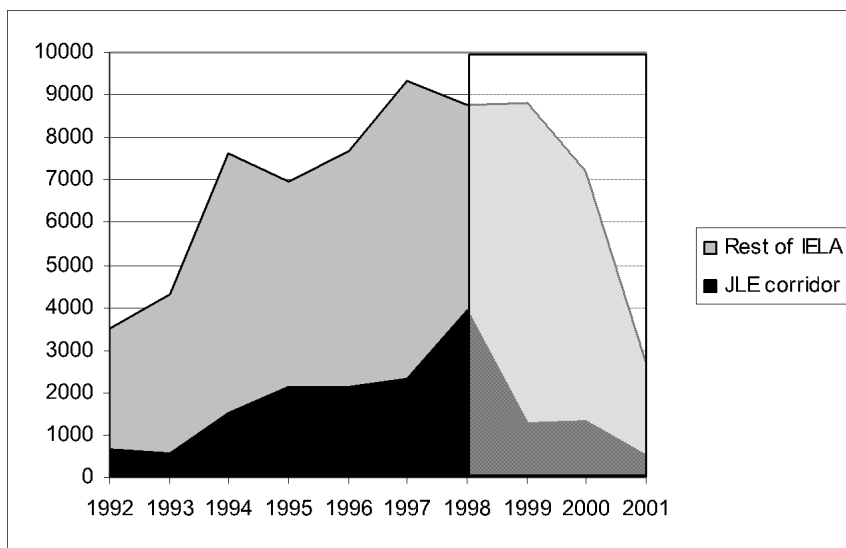


Note: Construction started data include 2001

²⁹ Data for the years 1990-91 are of less interest because they do not include dwellings resulting from planning applications prior to 1990.

- 4.3.6 The reason for the dramatic drop following 1998 is not clear, but by this time many of the available sites had been built upon, especially those whose marketability may have been perceived as more certain, such as the waterside sites in the Canada Water, Canary Wharf and Canning Town catchments. There may in addition have been a problem of under-reporting in the later years. Even so, the boom in the mid-1990s suggests a positive response to the JLE.
- 4.3.7 Again, it is necessary to compare these rates of activity with what was happening in the rest of the IELA. The Figure below illustrates the total new dwellings activity, and the split between CORA and the rest of the IELA. While the general shape of the trend in each area is similar, it may be seen that since JLE authorisation CORA has accounted for a higher proportion of the total activity. Up to the end of 1993, CORA accounted for less than 20% of the IELA, whereas from 1994 to 1998 it accounted for more than 20%.

Figure 5.5 Dwellings by year construction started – CORA and rest of IELA 1992-2001



- 4.3.8 As noted with the planning application data, there was a fall off after 1999, which may be a product of either the dataset or a decline in residential building, or a combination of both. It is unfortunate that this cannot be resolved since quite different impressions are created if the 1999-2001 data are ignored. If the semi-transparent section of the chart is ignored, we see a picture of CORA with a growing proportion of IELA residential building activity, with 45% recorded in 1998. Such a result would be consistent with the high proportion of IELA vacant land lying within CORA (47% in sample boroughs in 1998, see below).

Stronger demand in the JLE corridor for residential development?

- 4.3.9 To recap on the analysis, general indications of a positive JLE effect are presented but with some fairly important cautions and qualifications. To arrive at a firm conclusion is difficult, but an important factor is whether all the different indicators point in the same direction, or whether they tend to present conflicting or contradictory results.
- 4.3.10 As far as residential development is concerned the indicators discussed above (applications received for residential development; number of dwellings involved; and rate of change) present a fairly consistent picture of a greater development demand in the JLE corridor than in inner east London generally.

Is this attributable to the JLE?

- 4.3.11 All three of these indicators therefore reveal heightened interest in residential development in the JLE catchments following authorisation of the JLE, than in East London generally. The extent to which this can be attributed to the JLE is complicated by two factors in particular:
- Fluctuations in the development market mean that an upturn in development applications would have been expected after 1993 in any case;
 - The JLE catchment areas contain a substantial proportion of the developable land in East London, and indeed the JLE alignment was decided in large part on the basis that it would open up large areas of such land for development.
- 4.3.12 Nevertheless, the change in relative rates is indicative of the enabling or encouraging impact of the accessibility afforded by the JLE. The development land was available prior to 1993 and yet was not being taken up as rapidly as after JLE authorisation.
- 4.3.13 The evidence of the JLE is perhaps strongest in terms of the proportion of total IELA dwellings being developed that is represented in CORA. This was less than a quarter prior to 1993, and rose to almost half in the following years.
- 4.3.14 What is more difficult to say is whether development would have occurred without the JLE, or when this might have occurred, or whether it would have occurred at the same density or intensity. It is clear that higher densities have been encouraged through planning policies, and that the existence of the JLE has made such higher densities a workable proposition from the point of view of developers and, of course, occupiers. Such activity and interest was to a measurable degree focussed during the late 1990s on the JLE catchment areas.
- 4.3.15 Two further points need to be made, though they cannot be addressed through the LDMS analysis alone.

4.3.16 First, the higher rates of residential applications and development in CORA that is evident through the second half off the 1990s may have something to do with a “critical mass” of development being reached, which then generates sufficient confidence in the locations for increased levels of development interest. Especially in former industrial areas, developers of residential schemes have to overcome the “negative image” of an area before they can sell properties. This is because of a lack of confidence over such issues as crime and security, noise and pollution, and lack of support infrastructure found in established residential communities (such as schools and health care). Once it is clear that an area will be transformed into an attractive residential area, then dwellings will sell, and this then reduces the risks associated with development, thus prompting higher levels of interest from both developers and prospective residents. The net result of this is that the higher rates of development demand in CORA may be associated with a critical point being reached in the transformation of the area. The promise of the major increase in accessibility offered by the JLE authorisation in 1993 may be regarded as a key factor in enabling this crucial threshold to be reached.

4.3.17 Second, the distribution of residential planning applications within CORA are not always concentrated immediately around the JLE stations. The river is seen to be an important factor in the location of development schemes, rather than proximity to the JLE stations. It could be argued that this tended to counter theories of the close relationship between accessibility and development. However, the presence of the JLE has still increased the level of accessibility to perhaps above a threshold level for development at this scale to proceed.

4.3.18 The issue therefore needs to be addressed in terms of the particular circumstances of the JLE catchments. This is best done on a station by station basis:

Table 5.6 Distribution of residential applications in JLE catchments

	Distribution of residential applications within station catchment
Waterloo	Entire catchment is an area of high accessibility, and differentiation less likely to be reflected in distribution of development applications.
Southwark	Dependent on availability of development land and buildings
London Bridge	Dependent on availability of development land and buildings
Bermondsey	Dependent on availability of development land and buildings
Canada Water	Sites near to station developed for mix of residential and non-residential. Pattern of residential applications reflects marketable riverside sites rather than accessibility, but many of these are still within reasonable (10 minute) walk of JLE station.
Canary Wharf	Sites close to JLE are earmarked for office and commercial uses. Pattern of residential applications therefore reflects land use zoning rather than accessibility.

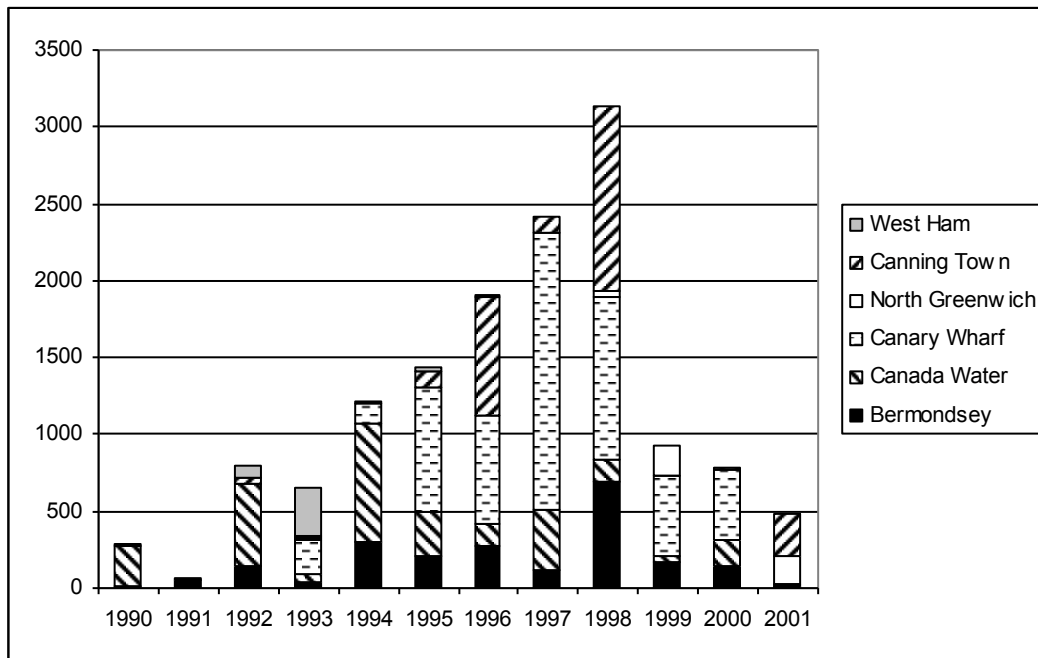
North Greenwich	Areas close to the JLE station not available due to land contamination, industrial use, and latterly the Millennium Dome. The nearest available suitable residential site is being developed as the Millennium Village.
Canning Town	Distribution of applications reflects availability of sites, most of which are located at a distance from the JLE station.
West Ham	Distribution of applications reflects availability of sites, most of which are located at a distance from the JLE station.
Stratford	Sites close to the station are earmarked for office and commercial uses. Pattern of residential applications therefore reflects land use zoning rather than accessibility.

Residential Development starts - MIA

4.3.19 Finally we can examine the trends in developments where construction had started or been completed. Information on starts and/or completions from the beginning of 1990 onwards is recorded in the LDMS, and these data include 2001, thus picking up many schemes for which planning permission was sought up to the end of 2000. Only residential schemes are analysed here.

4.3.20 The figure below shows the data for dwellings started in MIA, by year in which starting or completion was recorded. (To avoid double counting, if it was recorded as completed, then it was not included as a building being started.) It shows a much higher level of activity in the five years following the authorisation of the JLE. As with the analysis above, there is doubt about the significance of the drop off in the volume shown for the last three years.

Figure 5.6 Dwellings started or completed in MIA



4.4 *Mixed-use Development*

- 4.4.1 It is generally assumed that non-residential or trip-attracting development is (or can be) more strongly associated with high public transport accessibility than for single use residential development. Consequently mixed-use development (MXD) that includes a non-residential element is also more strongly associated with public transport accessibility.
- 4.4.2 Of 4,299 planning applications (all records in the period 1990-2000 inclusive) 348 proposed mixed-use development. Of these, 73 (about a fifth) were in the JLE corridor. Half of the 348 were in the Central Statistical Area, and half were in the IELA (which overlaps the CSA).
- 4.4.3 A proportion of these applications were superseded, so the number of sites involved is actually smaller. When superseded applications are removed from the data set, the figures are as follows:
- 3,475 applications excluding those superseded (1990-2000 inclusive);
 - Of which 261 were for mixed-use development;
 - Of which 135 were in the IELA, and 119 in the CSA (small overlap);
 - Of which 45 were within the JLE corridor.
- 4.4.4 In the CSA, and indeed city centres generally, mixed-use has always been more prominent than elsewhere due to higher density building and land scarcity. It is apparent that mixed-use has become more prominent in other areas through the 1990s, at least in part due to changed planning policies encouraging mixed as opposed to single-use schemes. The increased importance of mixed-use in IELA is shown in the table below. This (rather than the CSA) is regarded as the most useful benchmark in terms of assessing the impact of the JLE.
- 4.4.5 The figures are based on three-year moving averages, to smooth data variations caused by the relatively low number of cases. Mixed use formed a growing proportion of all development applications through the 1990s. In CORA this proportion grew by 2.5 times (Row 2). However, mixed-use was growing in importance throughout east London, not just in the JLE corridor. In the IELA, mixed use as a proportion of all development applications grew by 4 times, though from a lower base (Row 3). As a result of this, whereas the IELA proportion in the early 1990s was a third of that found in CORA, by the end of the decade the proportion was half of that found in CORA (comparing Rows 2 and 3).
- 4.4.6 Given the above analysis, it is not surprising to note that the mixed-use applications in CORA have tended to account for a declining proportion of all mixed use in the IELA (Row 4). The general conclusion from this is that:

- 1 Mixed use was more established in CORA prior to the JLE authorisation than in IELA generally;
- 2 Mixed use in CORA has continued to strengthen since JLE authorisation, but
- 3 Over the study period the importance of mixed use in inner east London generally has been catching up fast.

Table 5.7 Mixed use (MXD) development applications in CORA and IELA

Moving 3 Yr Ave	91-93	92-94	93-95	94-96	95-97	96-98	97-99	98-00
MXD as % of all CORA appns.	6	6	5	9	10	15	14	15
MXD as % of all IELA appns.	2	2	3	5	6	8	8	8
CORA MXD as % of IELA MXD appns.	39	42	38	40	35	36	34	34

Development volume

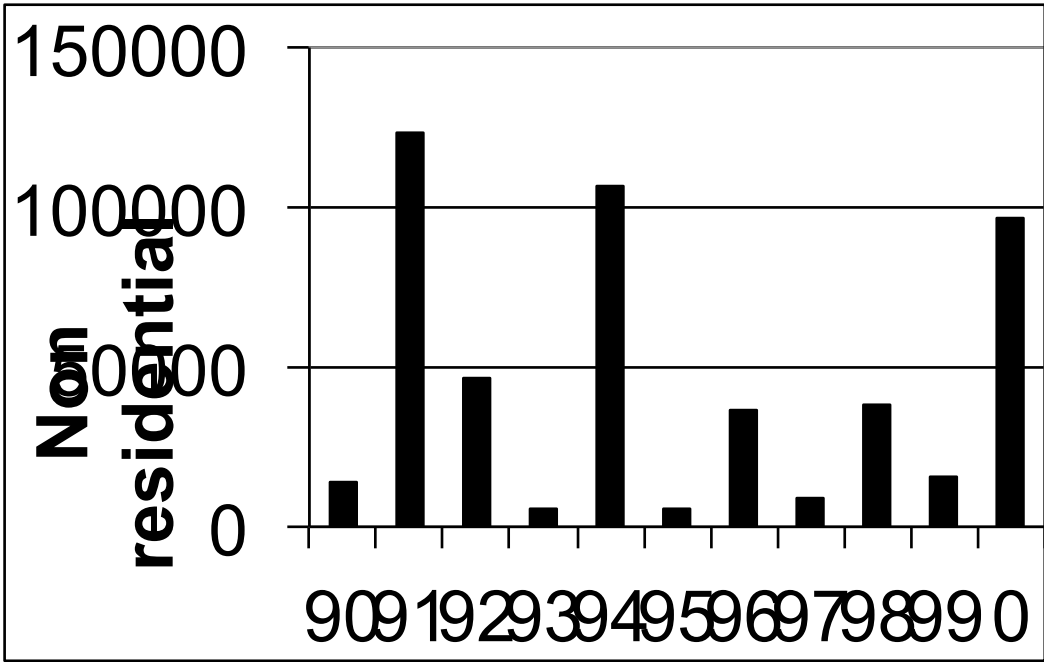
- 4.4.7 In terms of the ***volume*** of development represented by mixed-use schemes, the table below gives an overview of applications received. As in the analysis above, applications that were superseded or withdrawn are excluded, so the volumes shown give a good impression of the development demand.
- 4.4.8 The GFA data (shaded area on the table) are plotted for clarity in the Figure below. This highlights the strong fluctuations year by year, but more importantly gives no indication of any significant increase following JLE authorisation.

**Table 5.8 Volume of mixed-use development applications in the JLE
corridor 1990-2000 (Gross Floor Area or number of dwellings)**

Land use category	90	91	92	93	94	95	96	97	98	99	00
A1	0	2000	0	0	14844	2000	5288	3000	9150	2800	1313
B1	13660	121168	34370	5435	86806	2250	14506	4348	14106	9468	94045
D2	0	0	2700	0	4499	0	0	0	10053	0	1500
Other Non-residential	0	0	8975	0	0	1010	16300	1730	4928	3204	0
Total GFA non-residential	13750	123259	46137	5528	106243	5355	36190	9175	38335	15571	96858
C3 dwellings	22	699	30	162	286	41	359	621	2093	416	913
Ratio of GFA to Dwellings	625	176	1537	34	371	130	100	14	18	37	106

4.4.9 A significant trend, however, is the trend of an increasing residential component of mixed-use schemes, as indicated by the ratio of GFA to dwellings (last row of the table above). Thus, after JLE authorisation, the balance of residential and non-residential components of mixed-use schemes tipped in favour of residential. This, however, may be a response to stronger efforts by both the LDDC and (since 1998) the boroughs to provide a greater amount of residential development, including “affordable” dwellings. There is no obvious reason why the JLE should have caused such a shift. This issue is addressed also in the case studies

Figure 5.7 Gross Floor Area of non-residential element of mixed-use development planning applications (JLE corridor)

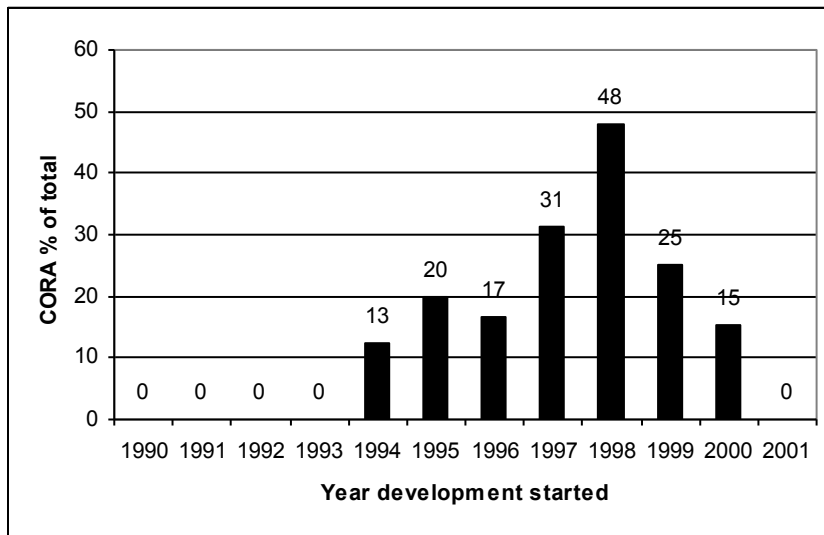


Mixed use in CORA

4.4.10 The picture changes somewhat when the data for CORA are compared with the reference areas. The proportion of mixed-use *applications received* falling within CORA remained fairly stable through the 1990s. However, not all of these applications resulted in development going ahead.

4.4.11 When the data are analysed according to *building starts* of mixed-use schemes, it is apparent that CORA had a higher proportion of the total mixed-use schemes after the JLE was authorised, as shown in the chart.

Figure 5.8 Mixed-use starts in CORA as % of total CSA/IELA records*



* *Development starts resulting from applications received prior to 1990 are not included. This is likely to be a contributory factor to the zero values for 1990-1993.*

4.4.12 The Figure indicates that following JLE approval in 1993, mixed-use schemes in the JLE corridor formed a higher proportion of total mixed-use schemes in the CSA/IELA, reaching a peak of 48% in 1998. This suggests a considerable impact of the JLE, albeit a short lived one.

Mixed use in the MIA

Applications

4.4.13 The corridor as a whole (and CORA as discussed above) includes catchments that already contain mixed-use development because of their proximity to central London, or (like Stratford) their role as a major centre. MIA has a different character with much of the area being in single use. Any change towards more mixed-use development is therefore of particular interest.

4.4.14 Mixed-use development demand has apparently increased in MIA since the JLE was approved. This is particularly apparent with mixed-use as a percentage of the total applications within MIA. The small number of cases must be borne in mind, however, and because of this the cases have been combined into three-year periods.

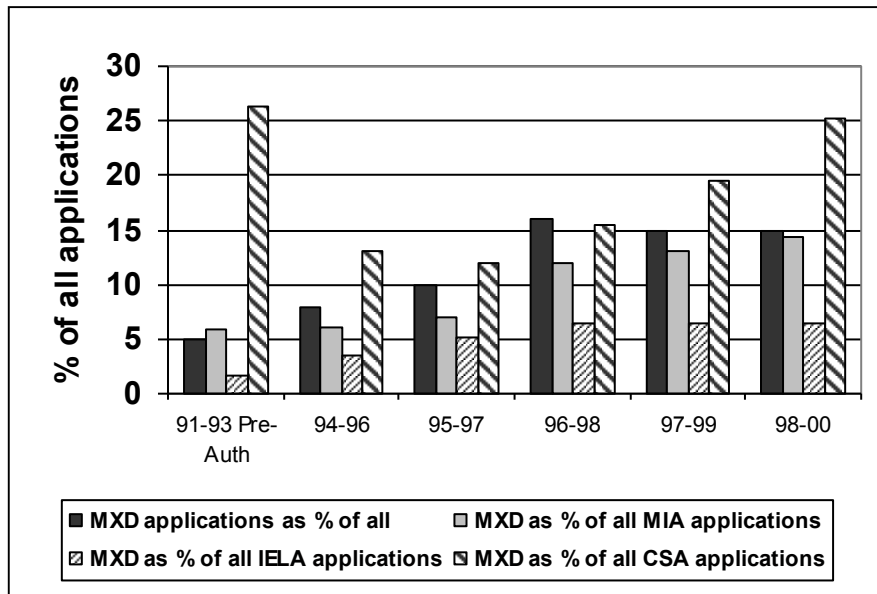
Table 5.9 Mixed-use (MXD) Planning Applications in MIA 1991-2000

Three-year moving totals

	91-93	94-96	95-97	96-98	97-99	98-00
	Pre-Auth	Post-authorisation				
MXD applications	5	8	10	16	15	15

in MIA (total number in 3 year period)						
MXD as % of all MIA applications (for 3 year period)	5.9	6.1	7.0	11.9	13.0	14.3

Figure 5.9 Mixed-use applications as a percentage of all applications in different areas



4.4.15 Data from Tables 5.7 to 5.8 on the proportion of mixed use application in the different areas are brought together in Figure 5.9 above. It is clear that MIA has a higher percentage of mixed-use applications than does the IELA as a whole. However, this situation pre-dated JLE authorisation, and the proportion has not grown as fast in MIA as in the IELA. Consequently the role of the JLE is not established, except to the extent that the accessibility offered by JLE is necessary to sustain such higher proportions of mixed-use.

4.4.16 The mixed use proportion of all development applications pre and post authorisation has increased faster in IELA than in MIA (though from a lower base), so again, this does not indicate a positive JLE influence.

4.4.17 On the other hand, looking at the post-authorisation three-year moving averages in the Table, the mixed use proportion increased faster in MIA (2.3 times) than in IELA (1.8 times). This could be due to the JLE.

4.4.18 Comparing with the CSA, it is interesting to note that although mixed use was a very much higher proportion of applications than in MIA, CORA or IELA, in the early 1990s, this proportion declined during the 1990s, but recovered somewhat towards the end of the decade.

5 *Development demand – case study sites*

5.1 *Introduction to case studies*

- 5.1.1 This section of the report examines the case study development sites chosen for the Development Impact Study.
- 5.1.2 It includes an update on the position of the 40 case study sites contained in the baseline study. The information for this report was updated to April 2002. The baseline study reference numbers for these case studies is retained in this update.
- 5.1.3 In addition consideration has been given to a number of further sites not considered in the baseline study. These consist of sites where development demand or activity has arisen since the baseline study, and where a story in relation to the JLE is considered to be significant. The case studies are organised sequentially from Southwark to West Ham.
- 5.1.4 The case studies are listed below, and a description of each one follows in turn. The location of each of the case study sites is shown in the context of the relevant catchment areas on the plans in the Appendix (section 8).

Southwark station catchment

- SW1 Southpoint, 197 Blackfriars Road
- SW2 Colombo House
- SW3 Bear Lane (Holiday Inn Express)
- SW4 Bankside Lofts Warehouse
- SW5 St George's Circus
- SW6 Pocock Street/157-168 Blackfriars Road
- SW7 Former Works, Pocock Street

London Bridge station catchment

- LB1 161-165 Tower Bridge Road
- LB1A – Tower Bridge Road and Tanner Street
- LB2 “London Bridge City” – “More London”
- LB3 127-129 Long Lane Community
- LB4 Magdalen Street
- LB5 144-152 Bermondsey Street
- LB5A Next to 74-84 Long Lane (Additional case study site)
- LB6 Leathermarket Court
- LB7 Vinegar Yard

Bermondsey station catchment

- BE1 Willow Walk
- BE2 Tamarind Court, Curlew Street
- BE3 Old Jamaica Road

Llewelyn-Davies

BE4 Webster Road
BE5 Mayflower Street

Canada Water station catchment

CW1 Lower Road East
CW2 Surrey Quays Road
CW3 Globe Wharf
CW4 Renforth Street Pumping Station Pumping Station
CW5 Baltic Quay Docks

Canary Wharf station catchment

CF1 Millennium Quarter (additional case study site incorporating Arrowhead Quay)
CF2 Canary Riverside Docks
CF3 West India Quay, Hertsmere House
CF4 Heron Quay Docks
CF5 Hutchings Wharf Docks
CF6 Pierhead Lock Docks
CF7 Wood Wharf (additional case study site)

Canning Town station catchment

CT1 Barrier Point
CT2 Limmo site
CT3 6 Oak Crescent
CT4 Silvertown Way - Peto Street
CT5 Bidder Street & Stephenson Street
CT6 Brunswick Wharf
CT7 Victoria Docks

West Ham station catchment

WH1 – Rick Roberts Way
WH2 – Bromley by Bow Gas Works
WH3 – Channelsea Business Park
WH4 – Manor Road: Pretoria Goods Yard

5.2 *Southwark Station catchment*

All of the case study sites within this catchment fall within the London Borough of Southwark. Most of the sites in the Southwark and London Bridge station catchment areas are within central London.

Case study SW1

“Southpoint”, formerly Orbit House (197 Blackfriars Road)

The site lies directly opposite the entrance to Southwark station, and thus accessible to the station in less than one minute. The site was occupied by Orbit House, which served for many years as a book repository for the British Library. There was apparently little interest in the development potential of the site until the library was moved to the new St Pancras British Library. By this time the JLE was under construction and the new station at Southwark had been decided.

An application was received in 1998 to adapt the building for a mixed use development and the addition of four storeys. The speculative proposal was for retail, offices, 12 live/work units, 14 flats and a hotel to the rear, and permission was granted in November 1998. It appeared at the time that the inclusion of a hotel was a direct result of the site being on the pedestrian route between Southwark Station and the Tate Modern.

In 1999 the site changed ownership and the 1998 permission was not pursued. A new application was made in September 1999 to redevelop the site for a new office building (B1) with 11 storeys plus basement, providing prestigious headquarter space for around 3,000 people.

In January 2002 work began on demolishing Orbit House to make way for the new building “Southpoint”.

The impact of the JLE on this site is summarised as:

- The two speculative proposals both aimed to maximise value of the site taking account of JLE accessibility, but also other regeneration of the area including Bankside;
- The timing had as much to do with the cessation of the former library use and expiration of the lease on Orbit House as with the opening of the JLE;
- The hotel proposal appeared to reflect expectation of new tourist activity at this location brought about by the JLE to Tate Modern route. This was not carried through to the later proposal, however.
- Rebuilding for office use only reflects faith in the strength of the office market at this location, and this strength will almost certainly

have been provided or boosted by the proximity of Southwark station.

The conclusion is therefore that the JLE had a positive impact in terms of maximising the value of the site. In terms of the community development aims of the Borough, however, it could be argued that the outcome redevelopment offers less diversity than the earlier scheme.

Another positive impact of the JLE is the fact that the new development is estimated to produce no net increase in traffic generation at the site. This is despite the large increase in employees at the site with the change of use from distribution and storage to offices. Car parking has been retained at the original 30 spaces, which closely reflects the maximum allowed for office development in Central London.

The new building – Southpoint – will have 25,274 sq m (272,000 sq ft) of accommodation on 11 storeys, 30 car parking spaces in the basement and a 303 sq m (3,262 sq ft) retail unit on the ground floor.

Case study SW2

Colombo House

This site includes offices and a telephone exchange owned and operated by British Telecom. It is located close to Southwark station on the other side of the national rail viaduct at Waterloo East. Although its address is Joan Street, pedestrian access is from Blackfriars Road about 50m north of the station entrance.

There was an indication in 1994 that BT wished to intensify use of the site when they applied for a change of use from telephone exchange to offices. However, the scale of the change was modest at 3,696 sq m, and there is no indication that the permission has been taken up. The site still operates as a telephone exchange.

In terms of JLE impact, it seems clear that the increased accessibility has not produced a sufficient increase in potential value to cause BT to override operational considerations of their site. The increased accessibility will, however, have benefited existing staff on the site.

Case study SW3

Bear Lane (Holiday Inn Express)

The site is about 350 metres from Southwark station, but otherwise public transport in the vicinity is poor. The hotel development proposal for the site was originally turned down on the grounds of loss of employment. The present Holiday Inn Express was approved following regional planning guidance calling for increased hotel accommodation to

support the Eurostar Terminal, 800 metres to the west. The development was completed in 1998.

It is somewhat difficult to assess the role of the JLE in the development. On the one hand Southwark station has brought the site much closer to the Underground network, and thus more suitable than previously for uses that attract large numbers of people. A hotel fits this description as well as offices. The provision of one car parking space to 6 bedrooms suggests a much heavier reliance on public transport than would be the case for a hotel development away from areas that are accessible by public transport.

On the other hand, a statement accompanied the hotel planning application to the effect that there was little demand for offices in the area, suggesting that public transport accessibility is low relative to other central London locations. The hotel use may therefore be seen as more a function of a higher value being placed on hotel than office or other employment on “marginal” central London sites.

The area is being rapidly developed for mixed use schemes including residential, and the question is raised as to whether a residential scheme could have produced a higher value. This is answered by two factors. First, the site itself is constrained and facing a busy traffic route (Southwark Street) making it less than desirable as a residential location. Second, the land use policy for the area emphasises the retention of employment, and indeed this initially led to the refusal of a hotel use. Residential would have been an even greater departure from the UDP policy.

Case study SW4

Bankside Lofts Warehouse C3/B1 New Build Under Construction

This case study site provides a good example of the way in which both the image and activities of the south bank of the River Thames opposite the City of London are being transformed. Planning policy for the area had been to protect sites for employment use, and this case study site was formerly used for offices, printing works and car park.

The area has now given way to mixed use and residential development and activities in keeping with “high profile” city lifestyles. The question is to what extent this turn around has resulted from or been enabled by the JLE.

The area falls within the Central London Statistical Area and as such was already reasonably well served by public transport, with buses serving Blackfriars Road and Southwark Street and rail services at Waterloo, London Bridge and across the river at Blackfriars. The JLE has brought the Underground closer, with Southwark station being half the distance of Waterloo from the Bankside lofts.

At this location, however, more than 400 metres from Southwark station, other factors appear more important for residential development, in particular the regeneration catalyst represented by the Tate Modern, the Millennium Bridge, the Globe, and the approach of a “critical mass” of high profile and visitor oriented activities within an easy walk of the City of London. Looking at it from a resident’s view, the JLE might be useful for accessing the west end, or Canary Wharf for employment, but the main appeal justifying the premium price of dwellings here is more likely to be the prestige of proximity to the river and the attractions mentioned, and the City within walking commuting distance.

Going back a step, did the “critical mass” of high profile activities itself arise in part due to the arrival of the JLE? Taking the Tate Modern as an example, discussions with the Tate revealed that the JLE was regarded as an important part of a package of transport links that were seen as vital to the project. Other possible locations for the Tate Modern with poor public transport links were rejected from the selection process. However, the selection of the Bankside site did not hang on whether the JLE went ahead.

The conclusion is that the JLE was one factor, but was unlikely to have been the key factor in the re-development of this site for high quality residential use.

Case study SW5

St George's Circus

This site lies 550 metres from Southwark station (about a 7 minute walk). It is in fact slightly closer to Elephant & Castle Underground station, with the Bakerloo portal at 450 metres. It is within an area designated in the UDP for employment.

The site is not built upon but is used as a commercially operated commuter car park. There have been signs of development interest both before and after JLE authorisation. Applications for an office block with basement parking were made in 1990, 1991 and 1992. Following concerns about over-development of the site, permission was finally granted in June 1992 for a scaled-down scheme, but this lapsed.

In 1999 permission was granted for a seven storey office block. Although the design of the building had changed in the interim, this was seen as a renewal of the 1992 permission. The arrival of the JLE in the interim did not lead to any re-opening of access issues. There was an application in 1995 for a 100-bed hotel, which might have been a response to anticipated demand following the JLE, but this was subsequently withdrawn for reasons that have not been disclosed.

The baseline study stated that parking provision for the proposed development conformed to the Council's maximum parking standard, but had not been scaled down in view of the site's accessibility by public transport. It should be noted, however, that the maximum allowed is restrictive in terms of commuting opportunities. At a ratio of one space per 1150 sq m, this would equate roughly to one employee in 50 being able to commute by car. Also, the Council did impose a planning condition to the effect that the car parking should not be used for commuter purposes.

The fact that no development has taken place on the site in more than 10 years could suggest one of two things

- The land owner (involved in all the applications mentioned) is seeking to establish the potential value of the site before proceeding with a development;
- The value of the site for development is not regarded as sufficient to make development worthwhile compared to the established car park use.

In either case it appears that the JLE has had no perceived impact on the value of the site. Timing of the applications was unrelated to the JLE

timescale, and later development proposals have been for somewhat smaller scale schemes than those proposed before JLE authorisation.

Two applications have been made for hotel development on the site. One in 1995 which was withdrawn, and another in 2001 which was refused. This might reflect interest generated by increased tourist presence due to the JLE, but the proximity of Waterloo International and South Bank University could equally be cited as possible factors.

The overall conclusion is that the value of the site and interest in its development has not increased as a result of the JLE. Nor has L. B. of Southwark sought to allow or encourage development of higher density or intensity following the increased accessibility brought by Southwark JLE station.

Case study SW6

Pocock Street/157-168 Blackfriars Road

This site lies about 250 metres south of the station portal on the main frontage of Blackfriars Road, which is designated in the UDP as an employment area. It includes Friars House, an office block dating back to the 1960s with its own basement car park, and an area to the rear used as a car park.

At the time of the baseline study Friars House was mostly vacant, indicating a weak demand for office space at the time. It was noted that a number of other former office buildings in the vicinity were being converted for residential use and it was expected that this could occur also for Friars House at some time in the future.

Since that time there has been little development interest in Friars House, but refurbishment for office use took place in the period 1999-2001 (a 1998 planning permission refers to refurbishment of the 6th floor). This indicates a strengthening of demand for offices in this location compared to five years before, and JLE could have played a role in this.

Most interest has been generated by the car park to the rear. Contrary to the impression given in the baseline study, car parking is not an activity that would be generated by the JLE. However, the JLE has been cited in planning discussions about the car park, to the effect that the high degree of public transport accessibility means that commuter car parking has been strongly resisted by L.B. of Southwark. Permission was granted finally for a contract car park (i.e. season ticket holders), initially for a

temporary period, but the use continues. Conditions are attached to the use of the car park, namely the setting of higher fees than were charged prior to the planning consent. It was also intended that the car park use was temporary until Friars House was re-let.

By March 2002 Friars House had been refurbished and was apparently fully occupied, but the car park to the rear was also in full use.

The conclusion from this case study is that confidence in the site as an office location has increased since the mid 1990s, perhaps due to a combination of an upturn in the office market after the early 1990s slump, but also supported by the arrival of the JLE. However, the strengthening of confidence has not resulted in pressure for the redevelopment or more intensive use of the car park site to the rear.

The JLE can therefore be seen as part of the background against which the use of Friars House as a viable office space has been revived. This is in contrast to demand on adjacent sites where employment use has given way to some extent to residential use. The Council appears to have had limited success in limiting the use of land to the rear as a commuter car park, but on the other hand its continued use as such does not indicate strong pressure for development whether prompted by the JLE or general market factors.

Case study SW7

Former Works, Pockock Street (Additional case study site)

This site was formerly a works and the UDP intention was to retain employment in the area. A proposal was submitted in 1998 for a mixed use scheme and in 1999 Outline Planning Consent was granted for 2,994 m² of office space and 24 residential units, and 28 parking spaces. This figure is significantly lower than the Council's parking standards for the area. This could be interpreted as reflecting the site's proximity to public transport services.

In 2000 an outline planning application was submitted by the London Institute (an organisation representing five art colleges across London) for an eight storey building comprising two floors of business use and six floors of student residential accommodation. The halls of residence were intended for students at two of the Institute's colleges in Camberwell and the Elephant and Castle.

Prior to submission of the planning application, the applicant was asked by the Council to justify the use of the Pocock Street site as a residential development. The Institute argued that the site was suitable for two reasons; firstly that there are few other alternative sites within Southwark where they do not compete against higher private residential values, and secondly that “the new student accommodation [needs to] be located within easy reach of the major new campus at Elephant and Castle whilst at the same time being accessible to its other sites in Central London. The new Jubilee Line will provide excellent public transport links to the rest of London, so sites close to Zone 1 Jubilee Line stations were preferred”.

Discussions with Council officers focused on the lack of employment space in the scheme. The applicants responded by suggesting that the site was better suited to residential use as there was no demand for office space within the area. However the evidence produced related to the pre-JLE period and the argument was not accepted by Southwark. Thus the planning application was amended to include 15,000ft² of employment space on the ground and first floors. Planning officers accepted the precedent for a mixed-use development had been set by the approval of the previous scheme (in 1998) and the provision of a small amount of office floorspace within the scheme was considered sufficient to enable a recommendation for approval.

The application was unpopular with local residents and local councillors who argued that it was detracting from the employment objectives of the UDP policy designation for the site. The Committee report shows that officers were satisfied that the scheme contained a similar mix of uses and floor space to the previous application and that the applicants would be more willing to accept parking space limits due to the nature of the accommodation.

Officers recommended approval and the application was referred to the Secretary of State (as a departure from the UDP). The application was not called-in and permission was granted subject to a S106 agreement. A condition was attached to the planning permission preventing student tenants from keeping cars locally.

There is no direct evidence that any account was taken of changing market circumstances before and after Southwark JLE station was opened. The JLE station nearby would have been a positive factor in the original selection of the site. In addition, as acknowledged in discussion of the previous application, the JLE is likely to have influenced the Council’s decision to allow a mix of residential and office uses in the first place, and therefore set a precedent for the acceptability of this application. However, records concerning the extensive pre-application site searches by the London Institute suggest that the *timing* of the

application was related more to the availability of the site than the opening of the JLE.

There is no evidence to suggest that the scale of the development was directly influenced by the JLE. The Council limited the height and scale of the application to 8 storeys, the same height as adjoining Friars House. However, the expected low car ownership amongst students helped to justify a high site coverage with minimal car parking provision.

The location of a student hall of residence on this site satisfied a very specific need of the London Institute but the proximity of the JLE also had specific attractions to the applicants as shown by the supporting statement submitted with the application: *“The hall of residence is within easy walking distance of the London College of Printing at Elephant and Castle. It is near to bus routes and to the new Jubilee Line Underground Station, giving access to Central London and other sites used by the London Institute. Car ownership and use by able-bodied student residents is therefore unnecessary.”*

5.3 *London Bridge Station catchment*

Case Study LB1

161-165 Tower Bridge Road

A former tannery, which had fallen derelict, was redeveloped for a 195-bed hotel (Travel Inn) with associated parking and an entrance road. The hotel was applied for in 1998 and completed in 1999.

Although within the defined catchment of London Bridge station, the site is not well located in relation to the station. The crow-fly distance appears on the map to be 600 metres, but the safest and most practical walking route from site entrance to station forecourt is almost double at 1150 metres, about 15 minutes walk time.

This helps to explain the conclusion that development of the site for hotel use had little if anything to do with the JLE. Although London Bridge as the nearest underground station includes the JLE, the applicants referred more generally to accessibility of the site to rail and underground services at London Bridge together with Tower Hill and Tower gateway (DLR) on the north side of the Thames. Parking provision for the hotel was 47 spaces (24%) and limited specifically to promote the use of public transport. Cycle storage and a coach drop off point were also provided.

The case study is interesting in that it provides an example of what has become a familiar pattern of change on the south bank of the Thames over the past decade, namely the shift in planning policy aspirations away from the protection of former industrial and commercial land for employment use, in the face of property market realities.

The hotel use in fact provided a certain amount of employment, and the developer also provided a local training facility as part of the planning agreement. In this way the development has contributed more to the local community than would have been the case with luxury apartments. The latter use is what tends to predominate on other sites in the London Bridge catchment.

Although public transport accessibility was a consideration and influence in the hotel scheme, there is no evidence that the JLE affected the type, timing or scale of development on this site.

The development was a response to a demand for hotel facilities in the area, close to the Tower of London and other tourist attractions on the other side of Tower Bridge, and this benefit was combined with a desire on the part of the Council to see more vitality in Tower Bridge Road. The redevelopment of the vacant site was considered to be an

enhancement to the appearance of the area and give a presence to Tower Bridge Road. This appears to have been achieved. Tower Bridge Road has now become a residential location as well as home to a variety of commercial and light industrial uses, providing a fairly vibrant mix of activity.

Case Study LB1A – Tower Bridge Road and Tanner Street (additional case study site)

Case study LB7 is also on Tower Bridge Road. The site in between these two case studies (LB1 and LB7) has also been redeveloped since the time of the baseline study. The mixed-use scheme comprises a new office building and apartments on the corner of Tanner Street and Tower Bridge Road, and to the rear of this development is a conversion combining refurbished offices with loft apartments. In combination the schemes have had a considerable impact on the appearance and vitality of this major thoroughfare and conservation area. The JLE may have played a role in this by providing a further layer of public transport accessibility for the area, but this cannot be specifically identified as having been a significant or distinct catalyst for the developments in Tower Bridge Road.

Case Study LB2

“London Bridge City” – “More London”

This is the largest site in the central London sector of the JLE corridor. It is really a combination of sites shown on the plan to form what is now called “More London” (formerly described as “London Bridge City”). An additional site has been included since the baseline study, making up the entire area shown on the plan in the Appendix as LB2.

The whole scheme, or set of schemes, completes the redevelopment of the stretch of the south bank of the Thames between London Bridge and Tower Bridge.

Accessibility to the JLE at London Bridge is between 250 and 750 metres (the site itself is 500 metres in length) via Tooley Street. The crow-fly distance to Tower Hill and Tower Gateway Underground stations is somewhat less, but the walking route via Tower Bridge results in distances well over a kilometer to the nearest part of the site.

There is no evidence to suggest that the JLE specifically influenced the scale of development, although the site’s proximity to London Bridge Station interchange was influential in the Council’s acceptance of high density development, low car parking and the mix of uses sought by the developers.

This case study and the amount of development included are of a sufficient scale to raise issues that are somewhat different from other case study sites in the central London sector of the JLE corridor. On the one hand, the JLE at London Bridge by providing direct access to the West End and Canary Wharf has added to a level of public transport accessibility that was already reasonably high. A history of pre-JLE applications for office development led to the conclusion in the baseline study that the JLE had no specific additional impact.

On the other hand, the volume of development and the resulting employees and other visitors attracted to the area is such that it will have a significant impact on the passenger flows to and from London Bridge station. The JLE has provided extra passenger capacity to enable this increase to occur with concomitant avoidance of increased congestion that otherwise would have occurred.

Also, the intensification of development in the catchment generally (of which this case study site is a significant component) has been a factor in the promotion of plans to re-build London Bridge Station, including better connections between the street and platforms of both suburban and Underground station platforms.

Overall, although the development is a large and significant one in terms of the JLE corridor, the role of JLE itself is not seen as being either large or significant. An argument can be made, however, for the impact of the JLE on the inclusion of a hotel in the final proposals for the site (no hotel was included in previous proposals). The JLE may have increased the location's suitability for hotel accommodation by virtue of the increased accessibility specifically to the West End as opposed to the City. (Other planning applications in the vicinity suggest that this area is viewed as a good hotel location, and the JLE may equally have had a role in this).

This site represents the majority of the More London development that has been masterplanned by Fosters and Partners. The whole More London development covers 5.3 hectares (13 acres). The scheme was originally called London Bridge City.

Planning permission has been granted for a gross total of 269,421 sq m (2.9m sq ft) of development to be completed in 2005. It is envisaged that up to ten buildings will be built to house a working community of 15,000. It will include the new GLA HQ, a hotel, Grade A offices and shops, cafes, bars and restaurants. Construction began in 1999.

The northern part of the eastern parcel has been titled Potter's Fields , formerly London Bridge City Park. Most of the eastern parcel is outside

the current “More London” masterplan, and at March 2002 was in continued use as a coach and car park. It is intended to become the main landscaped public space linking the current public space to the east of the GLA site. A total of 51% of the development’s surface will be public or open space. Through the office developments in the western parcel will be a diagonal walk linking Tooley Street with the riverside.

The western parcel of the site (to the west of Potter’s Field) incorporates the built elements of the masterplan and intervening public spaces. The case study site boundary identified in the baseline study does not incorporate the proposed Building Six in the south western corner of the masterplan. This is the additional site referred to here as LB2 A.

The GLA building or ‘City Hall’ was expected to be completed by mid-2002. It occupies the north eastern corner of the western parcel of land. It is intended to be a landmark for the capital designed by Fosters and developed by CIT Group. There are ten floors above the ground floor comprising 185,000 sq ft of floorspace. The building also includes space open to the public on the lower ground, ground and first floors including a cafeteria, display area, library and other facilities. On the top floor of the building will be “London’s Living Room” with public access, exhibitions, receptions, coffee bar and views across London. Surrounding the building will be a large public open space.

To the west of the GLA building will be an open space and then the Ernst and Young building which started construction in July 2001. This ten-storey development will consist of 46,450 sq m (500,000 sq ft) of office space. It will define the diagonal pedestrian route from London Bridge Station to Tower Bridge. Ernst & Young will move in during 2003.

To the south west of the GLA building will be the ten storey, 44593 sq m (480,000 sq ft) office development of Building Three. Construction had not begun in March 2002 and no tenants had been assigned.

Some buildings on the Tooley Street frontage in front of the location for Building Three remain and are awaiting demolition. They are not within the case study site.

To the west of Building Three will be Building Four, a ten storey mixed-office development of 32,516 sq m (350,000 sq ft). Planning permission was submitted for this site – Plot Four – on 1/2/02 (rear of 123-137 and 139-41 Tooley St) for construction of the ten-storey B1, A1, A2, A3 mix and servicing and parking. This too awaited construction and tenants.

Plot Seven – bound by the Thames, Potter’s Field Braidwood Street and 123-37 Tooley St. Application (31/1/02) for seven-storey office, B1,

A1,2,3. This has been approved in the masterplan. The retail element will include a supermarket.

In front of Building Four on the site of 143-53 Tooley Street (now demolished) planning permission has been submitted (1/2/02) for the site known as Plot 9, to construct a theatre with supporting retail, educational facilities and offices.

To the west of Building Four will be a hotel that will wrap around the western corner of new flats at Aston Webb House that have been built by Hamptons International and Thomsett Group Plc. The flats are a conversion of the Grade II listed 1901 Boord & Son's distillery head office. There are a total of 14 luxury flats

Outside of the case study site – in the south western corner - will be Building Six, an eight floor, 197532 sq ft office development with 875 sq metres of retail that received planning permission in January 2001. Bacon & Woodrow – pensions and investments consultancy – confirmed in November 2001 that it would occupy 58000 sq ft of Building Six with a possible extension of 23000 sq ft. They will move in during 2003. Construction began mid-2001 and is expected to be finished by the end-2002.

Case Study LB3

127-129 Long Lane Community

The baseline report states that this site is 500 metres from the JLE station. The actual walking distance, however, is around 700 metres. Nevertheless, for a residential development this still represents high accessibility by public transport.

Planning permission was granted in 1997 for 14 flats which were completed in 1999.

This scheme may be seen as part of a growing robustness in the local housing market. The JLE is one of a range of factors that brought this about, but cannot be identified as a key factor.

Case Study LB4

Magdalen Street

This case study is a former warehouse which has been converted to provide a mix of uses including flats, live-work units, together with C1, A3 and D2 leisure.

It lies about 300 metres (baseline study incorrectly said 100 metres) from the JLE station to the east via Tooley Street.

Given that the building is close to the London Bridge railway viaduct and arches, conversion for predominantly residential use is an indicator of how good location can overcome severe environmental disadvantages. This is highlighted by the high cost of development involving demolition and rebuilding behind existing facades. The development surplus was sufficient for s106 contributions to be agreed, for example for the implementation of on-street parking restrictions and the provision (off site) of affordable housing units.

The JLE has no doubt played a part in boosting the benefits and value of this location, in particular by providing a wider range of access to the West End and to Canary Wharf employment. But there are other strong factors, notably the proximity of riverside developments (including case study LB2) and availability of City of London employment within 10-20 minute walking distance.

Although the conversion work was completed in 2001, not all of the units had been let by March 2002. This may indicate a slackening of the market, perhaps due to a short-term over-supply of similar developments in the area. There are other sites close by which were on offer with potential for offices and light industrial (under the railway viaduct).

An earlier application for medical student accommodation was related to the site's proximity to Guys Hospital. There is no evidence that subsequent applications for residential and mixed use were influenced by the timetable of JLE construction.

The proximity of the site to London Bridge transport interchange apparently influenced the low level of parking provision agreed for the site, but there is no evidence in the planning discussions of specific JLE influence.

Case Study LB5

144-152 Bermondsey Street

This site lies 800 metres (10 minute walk) from the JLE station. Given that the site has been, and continues to be used primarily for storage and distribution (Recall Total Information Management), neither the JLE nor London Bridge interchange generally can be held to be of much relevance.

The locality is the subject of Supplementary Planning Guidance and the Bermondsey Street Area Action Plan, aimed at securing regeneration and improved vitality of the area. The case study site is designated in the 1995 UDP for employment.

There have been no applications on the site, suggesting no interest in more intensive employment use, or redevelopment for other uses.

The conclusion is that the JLE has had no impact on this site.

Case Study LB5A

Next to 74-84 Long Lane (Additional case study site)

It may be noted that other sites in the vicinity are being converted from industrial, storage or commercial use to residential and mixed use. An example lies immediately south next to 74-84 Long Lane, west of Crosby Row, where a vacant site and derelict site awaiting demolition has been acquired by Berkeley Homes.

Case Study LB6

Leathermarket Court

The site's proximity to the London Bridge transport interchange (about 700 metres distant) was influential in justifying reduced parking standards (and higher densities) and is likely to have influenced the site's marketability as a residential location. There is little evidence that the addition of the JLE added significantly to the overall accessibility judgment.

The site is now occupied by a gated residential development with 107 flats and secure on-site parking. This was the result of two post JLE authorisation planning permissions and construction was completed in 1997. Up to March 2002 there had been no further planning applications relating to the site.

The overall conclusion remains as given in the baseline study, that the JLE had no definable impact on the development of the site.

Case Study LB7

Vinegar Yard

This case study site has been the subject of major development activity since the JLE authorisation. Warehouses dating from the mid 18th

century were vacated in 1992 and have been undergoing conversion for a mix of residential, live-work and small business uses. The site lies 700-800 metres from the JLE station, although the route is indirect and no buses link the two. It is within the Bermondsey Action Area Plan which encourages mixed uses.

The site has been developed in stages with B1 and C3 uses included in three applications in 1996, 1997 and 1998. The most recent application in 2001 is for conversion of the Gatehouse building for a further 40 flats, and this was a modification of a 1999 application for mixed B1 and C3 use. By March 2002 only this north east corner of the site remained for development, though various units on other parts of the site were available to let.

The timing of development activity appears to have been the result of market conditions and influenced by the Bermondsey Action Area Plan after the adoption of the UDP in 1995. The scale and character of the development was influenced by the listed status of warehouse buildings on the site. Public transport was cited in support of low levels of car parking provision, but the JLE was not specifically identified.

The conclusion is that the JLE played no specific role in bringing forward development of this site, other than its general thickening of public transport accessibility for the locality.

5.4 *Bermondsey Station Catchment*

All the case study sites fall within the London Borough of Southwark, for which the UDP was adopted in 1995 and was under revision during the period of this study.

Case Study BE1

Willow Walk

This site is 1250 metres (15 minute walk) from the JLE station portal (not 900 metres as stated in the baseline study). A 1998 application for development of the site for a mixture of B1, B2 and B8 uses was completed in 1999.

The application was consistent with UDP policies on employment, density and car parking, and there is no evidence that any specific consideration was given to accessibility afforded by the JLE.

The overall conclusion is that the site is too remote from the JLE station to expect any impact, and no such impact was apparent from the development process.

Case Study BE2

Tamarind Court, Curlew Street

The site is part of a major transformation that has taken place over a ten year period of the former spice warehouses east of Tower Bridge.

The site, which is 900-1100 metres from the JLE station (depending on the route chose), was perceived by Council planners to be poorly served by public transport and the JLE does not appear to have changed this point of view. The developer was willing to undertake the project with limited resident car parking facilities, and this initially raised concerns. No provision was made via legal agreements for additional linkages (bus or walkways) to Bermondsey station.

The key planning application was approved in 1997 for a mix of residential units and office space and a small amount of associated leisure use such as a gym. Parking is provided at ground and basement levels. The scale and form of the development and parking provision is in line with both UDP and the Butlers Wharf Master Plan.

The development occurred at a time when the area was experiencing a significant growth in the development of new and converted luxury residential accommodation. Most former warehouse buildings within the area are in the process of or have finished being redeveloped or converted. The principle driving force behind this was the combination of earlier investment in Butlers Wharf (mixed housing and retail), the river and dockside frontages and the suitability of the original high quality warehouse buildings for conversion. There is no evidence that any increased development interest was shown in the area after the announcement and construction of the JLE.

The overall conclusion is therefore no JLE impact.

Case Study BE3

Old Jamaica Road

This elongated site is 300-500 metres from the station portal and was formerly in use for a mix of industrial, storage, residential uses and a pub and open space. It is a difficult site being adjacent to the north side of a railway viaduct, and offering a relatively narrow strip of land between the railway and Old Jamaica Road.

Indication of planning interest in the area is apparent from the production of Supplementary Planning Guidance approved in 1997, which designated the area for employment supplemented by open space and residential uses.

A further planning initiative followed in 2000 when the Council commissioned consultants to prepare the “Bermondsey Spa Regeneration Masterplan”, subsequently to be adopted as a further Supplementary Planning Guidance.

The western half of the site was in use during the late 1990s as a construction site for the JLE. In 1999 a planning application was received for the restoration of the 45 railway arches to provide light industrial premises, together with limited A1 and A3 uses. The whole development was completed in 2001 to form the Old Jamaica Road Business Estate. Parking provision was slightly lower than UDP standards, but no specific mention of the JLE was made in justifying this.

In March 2002 the eastern half of the site remained derelict and awaited development applications in line with the UDP designated use for housing and community open space. There was no immediate prospect of such an application coming forward.

In conclusion, other than the negative impact of preventing other development taking place on the site whilst it was used as a JLE construction site, there is no evidence of a JLE impact on development activity on this site.

It should be noted, however, that a large area on the opposite side of Old Jamaica Road was the subject of significant development interest by the beginning of 2002, with developers preparing possible schemes for a mixture of new building and refurbishment to provide a major mixed use. Such a scheme (which had not yet resulted in a planning application, and which therefore cannot be revealed in detail) may well be regarded as a response to the JLE, and in turn could prompt redevelopment of other sites in the area. Including this case study site.

Case Study BE4

Webster Road

The formerly derelict site, lying 400 metres (200 metres crow-fly distance) from the station portal, has been developed for ten terraced houses (Wimpy “Town Houses”).

This case provided an early indication of a development response to Bermondsey JLE station, with the JLE mentioned in support of the 1998 planning application. However, this view is not reflected in later planning cases where the Council did not make reference to the station or other public transport links. More significantly the developer opted for off street parking rather than a greater number of housing units on the site, suggesting that the accessibility to the JLE was not a determining factor in the type or scale of development. The timing of development interest could be interpreted as being influenced by the JLE given the site’s previous history of dereliction and no development activity.

Case Study BE5

Mayflower Street

This site is roughly equidistant (about 600 metres, not 400 metres as stated in the baseline study) from both Bermondsey and Canada Water stations, though the walk to Bermondsey is a good deal simpler; hence the inclusion in the Bermondsey catchment case studies.

There are two former office buildings on the site which were converted to mixed use office and residential above following applications in 1995 and 1996. The schemes were approved by LDDC.

Car parking became an issue, with the applicants and LDDC arguing that proximity to Rotherhithe station (not JLE stations) meant that a level of provision lower than UDP standard was justified. Southwark Council made representations to get the amount of residential parking increased, and eventually a compromise was reached. This suggests that the developer was somewhat more aware of the potential benefits of public transport accessibility than was the Council. This view is supported by other case studies, especially in the Canada Water catchment (see below).

The other point of interest is that the planning policy for the area included the retention of employment. This was achieved in the context of the original mixed use scheme, but the number of employees will be lower than that accommodated in the original single use office buildings. Moreover, a 1998 planning application sought to convert the ground floor office space to further flats, and at March 2002 the office space in the other building was vacant. This suggests a low demand for offices in this location despite the accessibility of the JLE. This reinforces the general hypothesis that 600 metres is too great a distance to have an impact on demand for employment uses.

The conclusion from this case study remains as stated in the baseline study, that the JLE had no discernable impact on the development of the site.

5.5 *Canada Water station catchment*

All the case study sites fall within the London Borough of Southwark, for which the UDP was adopted in 1995 and was under revision during the period of this study.

Case Study CW1

Lower Road East

The site is about 850 metres from the JLE station near the southern catchment boundary. Surrey Quays station (East London Line) is only 300 metres on the way, and this could be regarded as a feeder to the JLE as far as this site is concerned. There is no direct feeder bus however and the site lies on a one-way gyratory system that separates the bus routes.

The site was mostly vacant for many years as a result of safeguarding for a road widening scheme, although a public house remained on the site and was still functioning in March 2002.

Although the Council in 1996 indicated that mixed use development would be appropriate on the site (once the widening safeguarding had been removed), the first indication of developer interest in the site was an application in 2000 for a 64-bed care home. By March 2002 this had been completed on the south-eastern portion of the site. There is a landscaped car park between it and the Dreadnought public house.

A residential care home is not regarded as the sort of development that would have been prompted by the JLE, and certainly not at such a great distance from the station.

It may safely be concluded that the JLE has had zero impact on the development prospects for the site.

Case Study CW2

Surrey Quays Road

The site, or rather sites, is on the north east side of Surrey Quays Road between 200 and 400 metres east of the JLE station portal.³⁰ The sites form part of a larger scheme including four sites identified for development in a joint plan by the Council and LDDC in the 1980s.

The planning history reveals a rather shallow understanding of the potential benefits of development oriented towards public transport accessibility. Canada Water station in March 2002 stood in splendid isolation, with development just visible beyond a sea of roads and car parking. The story, however, is beginning to unfold in a more satisfactory way, and the impact of the JLE interchange is beginning to show itself on the sites identified on the plan.

The Surrey Quays shopping development is now acknowledged by the Council to be poorly related to the JLE station, and the intention is to produce a new master plan for the entire area with the principal aim of developing a more robust district centre.

Developments that were reported in the baseline study were of low density and with large amounts of car parking, double the minimum standard in the adopted UDP. The UDP was adopted in 1995; a year after the publication of PPG13, which stated that planning authorities should revise their parking standards in new developments from minimum to maximum standards. It is apparent that the LDDC continued to make decisions that ran counter to this approach, while L.B. of Southwark appeared unable or unwilling to insist on this new approach, even on sites in council ownership.

The baseline study concluded that the JLE had

- influenced the content of the 1994 development brief for the area, and
- influenced subsequent schemes in terms of their orientation and the treatment of the spaces, footpaths and linkages around them.
- The present author would take issue with these conclusions in favour of the Council's conclusion that the proposals represented a "shopping environment aimed entirely at the car user". The same

³⁰ The site description in the baseline study is completely incorrect and should be ignored. The baseline study included a number of errors also in terms of site numbering and identification.

conclusion can be drawn about the mixed leisure and restaurant/bar scheme (12,320 sq m with 669 car parking spaces), approved by LDDC on the site immediately south of the identified case study site.

- In March 2002 the case study sites had been fully built out with two single storey retail “sheds”, but only one of these was occupied.
- Despite the fact that these retail schemes were approved only in 1996, and completed by 1999, applications were submitted in August 2001 for redevelopment as follows:
- Site D received permission for the construction of 1x7, 5x8, 1x9 storey blocks of 251 residential units, 22 live/work units and business/retail units with car parking
- Site E received an application for offices and telehotel by Foreign Property APS. The hotel would be built over six storeys whilst the offices would range from five to 18 storeys.

This represents a more realistic response to the sites’ proximity to the Canada Water interchange, and is a strong indication of a positive development impact of the JLE. The new applications suggest that the reality of the JLE once opened prompted a major rethink by development interests and the planning authority, both perhaps encouraged by the rapidly changing national and regional planning policy context in favour of public transport oriented development.

The conclusion is that the JLE initially had little impact on the scale and type of development, and that in terms of public transport oriented development theory, the potential of the site was not recognised by applicants, the LDDC or Southwark Council.

More recently this potential is being recognised, by both the private and public sectors, and has led to proposals for much more intensive use of the sites. There is, however, scope for much greater intensification of development around Canada Water station in future. A considerable area of open and under-used land remains in proximity to the JLE station, with no current development applications at the time of writing. The Council’s proposed master plan for a new district centre for the area may stimulate the take up of JLE opportunities in future.

Case Study CW3

Globe Wharf

The baseline study gave a false impression of the accessibility of this site to the JLE, stating a distance of 400 metres compared to the actual walking distance of 850 metres, a 10 minute walk. Moreover, the walk is partly along paths that are not well lit or overlooked, and would in practice be unrealistic for use after dark. There are two bus links, but one of these does not operate after 6pm, and the other takes a circuitous route. The two services leave from different stops towards Canada Water, which means that passengers would have to take their chance on which is likely to arrive first. The return journey would be less of a problem because both routes leave from the Canada Water interchange, where waiting facilities are available.

Another option for residents, and a site visit revealed evidence of this being chosen, is to take a bus to Bermondsey JLE station, which is served by two routes (225 and 381) both operating through the evening.

The upshot of this site analysis is that Globe Wharf is not unambiguously within the walking catchment of the JLE, but is dependent to an important degree on feeder bus services. This means that ascribing development impact to the JLE is a more dubious hypothesis.

Although during the 1980s Southwark Council had sought to retain the site in employment use, a permission for conversion to flats was granted by the LDDC in 1987. Neither this nor an application for offices in 1988 was taken forward. It was not until 1996 that a further application for conversion of the existing buildings to flats was taken up. Construction was started in 1997 and was completed by the time of the June 2000 update of this case study. The timing of the development of the Globe Wharf site suggests that the JLE may well have had a positive influence.

Discussions with the marketing agency suggested that proximity to the JLE is a selling factor, but the riverside location is also an important attraction for prospective purchasers.

The overall conclusion is that the potential for development for residential had already been established prior to JLE authorisation. The timing of the development appears to have been related to market conditions rather than the JLE programme. There is therefore no evidence that the JLE had an impact on the development of this site.

Case Study CW4

Renforth Street Pumping Station Pumping Station

The case study site lies immediately adjacent to the JLE Canada Water interchange. However, a wall separates the two, and residents must take a circuitous route to reach the station entrance, involving a 450 meter walk (5 minutes) including through an open space that may be perceived as unsafe after dark. The odd feature of this is that the wall was retained at the request of residents who petitioned the JLE Bill. For them, presumably, the station was seen as having a negative impact on the area, rather than bringing positive benefits in the form of improved accessibility.

The pumping station use had been discontinued for many years, and development potential was established with three planning permissions prior to JLE authorisation. Neither these nor a further permission in 1995 were taken up, however.

Construction of the scheme to provide 53 dwellings (part conversion, part new-build) was complete by March 2002, although units had not been occupied. The type of development is in keeping with the residential nature of the area and is unlikely to have been directly influenced by the JLE.

The decision to begin development of the site in 2000 and not before (despite gaining consent in 1995) suggests that the opening of the JLE may have influenced the timing of the development. It is likely that the site has benefited from improved public transport accessibility due to its proximity to Canada Water Station. As a result the marketability of residential units in the area is likely to have improved with the opening of the station. This may have helped to produce scheme viability on a site that had both design constraints and heavy costs involved in converting the listed building to residential units.

There is also an indication that density and parking standards were breached in view of the proximity to the JLE station, but the amounts involved are too marginal to offer concrete evidence.

The overall conclusion is that the proximity of the site to the JLE station had no impact on the scale or type of development, and that no effort was made to maximise the proximity advantage by any footpath link between the two sites. The opening of the JLE station may, however, have been the spur to eventual construction of the much delayed scheme.

Case Study CW5

Baltic Quay Docks

The site was perceived by its owners as being poorly served by public transport but that this situation would improve with the opening of the

JLE station at Canada Water, which was claimed to be “nearby” or “10 minutes walk”. In fact the site is at least a 15 minute walk, and not a pleasant one at that.

The JLE had been used as an argument in planning applications for the inclusion of office and retail development on the site, in line with the LDDC aspirations for the Surrey Docks area. Southwark quite rightly were sceptical of this view, especially given that Surrey Quays shopping centre lies between the site and the JLE station.

In fact the final applications (resulting in the development of the site that was completed by 2000) were for residential use only, converting offices and an unsuccessful retail unit to residential use. The final type of development is regarded as the product of property market fluctuations, however, rather than any influence of the JLE. In particular the office market in docklands at the time was weaker for offices than for residential. The scheme was completed in 1998.

The overall conclusion is that the site is too remote from the JLE station to seriously construct a hypothesis that the JLE had an impact on its development.

5.6 *Canary Wharf station catchment*

The case studies in this catchment are of particular interest in terms of non-residential development. Non-residential applications are too few in number to allow analysis through the LDMS database. The emphasis for non-residential development is therefore through the case studies, and Canary Wharf catchment provides the greatest proportion of such development within the JLE corridor as a whole.

The baseline study focused on two types of case study sites: firstly a group of sites within 500 metres of the JLE station, and secondly riverside sites that were fairly remote from the JLE station.

South of the JLE was Arrowhead Quay (CF1). After the baseline study there was a step change in planning interest in the sites south of Heron Quays, and the area has been the subject of a masterplanning exercise, and the creation of a development partnership. The area concerned is now referred to as “Millennium Quarter” which includes but is much larger than the Arrowhead case study site. As a consequence, case study CF1 has been expanded to deal with the Millennium Quarter.

Case Study CF1

Arrowhead Quay and Millennium Quarter (baseline case study site of Arrowhead Quay now part of Millennium Quarter)

The story of the Arrowhead Quay site gives a good background to understanding the plans for the wider Millennium Quarter, which lies immediately to the south of the Canary Wharf development. By the late 1980s the character of the general area as an office location had been established through the commitment at Canary Wharf. The eventual use of this site was not so clear, however, especially in the early 1990s when the office market on the Isle of Dogs slumped. Owners of the site were hedging their bets in submitting a speculative application for either hotel or office use, with a total floor area of around 20,000 sq m. This was approved in 1993 but despite the flexibility of the permission, no buyers were found between 1993 and 1997 reflecting the state of the local markets, and the permission was renewed unaltered in 1997.

A further application was made in 1998 proposing a 50:50 combination of office and residential uses in buildings ranging between 7 and 11 storeys. The shift of interest towards residential development (including a proposed 25% of affordable units) reflected the continued lack of

confidence in the local commercial property market, and for office development in particular. This was not helped by the explosion of an IRA bomb on the site to the east of Arrowhead Quay.

By the turn of the decade things were looking rather different. Not only was there resurgence in the office market, but also the opening of the JLE at Canary Wharf and the DLR extension to Lewisham had dramatically increased the inbound accessibility of the locality.

A new planning application (by Ballymore Properties) in February 2000 reverted to primarily office use, and with almost three times more gross floorspace than provided in the earlier permissions. Following various amendments and negotiations throughout 2000 a mixed use scheme emerged with 60,000 sq m of floor space comprising of office, leisure and retail uses and public open space and dockside walkway. Approval was given shortly after the Council's approval of the Millennium Quarter Masterplan (September 2000) and thus became one of the first firm development prospects within the new framework. Approval for the final scheme was given in May 2001 and construction was under way by March 2002.

The proposed scheme will incorporate an office building described as "a landmark gateway to the Millennium Quarter" and consisting of two towers of 17 and 25 storeys. Restaurants, retail and a health club will be contained in the main building, while a "landscaped plaza" will contain a free-standing retail pavilion. A third of the development site is designated for public use with the waterfront plaza.

Lower parking provision had been accepted by the LDDC in relation to the earlier applications in view of the good public transport accessibility. The DLR extension and the JLE at Canary Wharf further reinforced this approach, and correspondence indicates that it was Tower Hamlets Council as the incoming planning authority that led the way in ensuring that the scheme took full advantage of its highly accessible position. This is indicated by the design of the building, with its main entrance orientated towards the pedestrian access from Canary Wharf station rather than the road access from Marsh Wall.

With only 55 parking spaces, the scheme reflects government guidance in PPG13 and the stringent parking standards adopted for accessible locations in London. Precedents for height and density had been set by other new developments immediately to the north (adjacent to the JLE station) and the applicants used good public transport access to the site to further justify the much-increased scale of the development compared to earlier proposals.

The Transport Assessment submitted with the scheme highlights the site's proximity to Canary Wharf stations and estimated that almost half

of staff working at the development would use the JLE for commuting to and from work. The application proposed a 'Green Travel Plan', to be prepared in conjunction with LB Tower Hamlets, with the aim of maximising use of non-car modes of travel. It was forecast that this would help to ensure that 85% of people using the proposed offices would use public transport by 2003.

The overall conclusion from this case study is that while fluctuations and uncertainties in the property market held back development of the site for 10 years or more, in the end the step change in public transport accessibility with the JLE helped to fuel the resurgence of office demand and to produce a much more intensive use of the site. The proximity of other major office buildings both completed and under construction, and the commissioning of the Millennium Quarter masterplan must also have been influential in bringing forward the final scheme.

Millennium Quarter

Since the baseline study in 1998, a large area to the south of Canary Wharf has been designated the "Millennium Quarter", and has been the subject of a major masterplanning exercise to enable the full development potential of the area to be exploited. In fact most of the area had already been developed since the 1980s as part of the LDDC and Isle of Dogs Enterprise Zone initiatives. In those early days of Docklands regeneration, however, the full potential was not anticipated, and so the density of development was relatively low. Most of the sites were occupied by one or two storey buildings (including LDDC offices for a number of years).

The designated area to which the masterplan applies is shown on the plan in the Appendix (section 8). Arrowhead Quay is site number 1 on the plan.

The Millennium Quarter has developed from a masterplanning exercise to a major regeneration and redevelopment programme with its own implementation mechanism. The masterplan itself had been used as a tool of development control from 1999 onwards. From 2001 an office was established with four officers seconded from Tower Hamlets Council for a period of 10-15 years to enable the implementation of the Millennium Quarter masterplan. This time period is necessary to cover the period of existing leases in the area.

A budget of £35 million was established to fund this activity, funded from planning gain (Section 106 agreements with developers in the

area). A tariff rate per square metre of new development floorspace was established, and this produces the £35 million figure. The planning gain will include some transport investment (see below) but also community facilities, public art, affordable housing, training obligations, and a code of construction management.

The masterplan will release 5 million square feet of commercial floorspace on 50 acres of land, in addition to 2,000 new homes including 25% “affordable” homes. Both of these figures are likely to increase as detailed proposals are drawn up.

In promoting the intensification of development in the Millennium Quarter, Tower Hamlets council has insisted that transport and other infrastructure investment is essential if the development is to work. The following have been identified:

- 1 An upgraded or new South Quay DLR station, with development contributing £9 million towards this;
- 2 A new pedestrian bridge across West India Dock South, to provide a more direct and higher capacity pedestrian connection between the Millennium Quarter and Canary Wharf including the JLE station. Development will pay for the construction of this new bridge and its maintenance in perpetuity;
- 3 A remodelled entrance to the Canary Wharf JLE station facing the new footbridge, to reduce the “short hop” journeys made on the DLR across the dock;
- 4 Highway improvements, including the redesign of current roads to provide pedestrian priority;
- 5 Improved bus services and interchange facilities.

The eventual scale of the Millennium quarter development could be considerably higher than currently envisaged, depending on the outcome of future planning of transport infrastructure. In particular, increased capacity on the JLE and the DLR was being sought, while negotiations were getting under way on the provision of a Crossrail station on the Isle of Dogs. The latter would create a huge increase in public transport capacity. Consultants had been appointed to look at the long term prospects for public transport serving the area.

Even so, the plans already envisage a huge intensification of development. As an indication of the scale of change, the average plot ratio of the Millennium Quarter will rise from 2:1 to 10:1, following the development of six or seven 25 storey office towers. The masterplan as

it stands will result in development that is roughly half the size of the Canary Wharf development. There were 26 owners within the Millennium Quarter, and none of these was Canary Wharf Plc.

To achieve the higher densities, parking space provision in the Millennium Quarter is significantly lower than the maximum Borough Plan standards (about 80% below the maximum). Highway investment will take about £2.5 million of the overall budget to meet the anticipated traffic impact, and Travel Plans will be required for each development scheme.

So far, the Millennium Quarter project has been a remarkable demonstration of the change around in development planning that can occur following major investment in high capacity public transport. Unlike Canary Wharf, which is a private estate in single ownership, the Millennium Quarter also demonstrates the potential for pro-active planning and partnership between the public and private sectors to achieve a coordinated and planned uplift in development intensity that includes community as well as private benefits. The negotiations on planning obligations have, however, been tough and will need to remain so over a lengthy period of time.

Case Study CF2

Canary Riverside Docks

This case study includes three substantial sites arranged around Westferry Circus at the western end of the Canary Wharf complex. The land is owned by Canary Wharf Group Plc. Distance to the JLE station is 400-750 metres (5-10 minutes walk).

The north west plot (Phase I) is complete and includes 325 luxury apartments, a 5-Star hotel, health club, bars and restaurants. There are four buildings within this phase – Eaton House, Belgrave Court, Berkeley Tower and Hanover House. The 139 room Four Seasons hotel is adjacent to the 3,700 sq m (40,000 sq ft) Holmes Place Health Club. There is also underground parking and landscaped gardens.

Phase 2 on the north east side of Westferry Circus consists of three buildings that have been completed and are fully occupied:

- 1 Westferry Circus: 230700 sq ft of office and retail, designed by SOM. The tenants are Texaco, Credit Suisse.
- 7 Westferry Circus: 175000 sq ft of office and retail, designed by SOM. Tenants are Edward Jones, EDS, EMEA.
- 11 Westferry Circus: 142200 sq ft designed by Koetter, Kim and Assoc & Perkins and Will. Tenants are Readers Digest Assoc, Edward Jones.

Phase 3 lies south of Westferry Circus and has yet to be developed. In March 2002 the case study part of the site was still in use for car parking. Restaurants and a pedestrian podium that opened in 2000 occupy the land in between Phases 1 and 3 (West Ferry 1).

The site has always formed part of the LDDC's comprehensive redevelopment plans for the central Docklands area and is a key component of the overall Canary Wharf plans. Although the site lay within the LDDC development area, the majority fell outside the original Enterprise Zone and its development has come later than many of the neighbouring sites that immediately adjoin the West India Dock.

The case study sites were the subject of a number of applications throughout the 1990s. The majority of these, however, were detailed applications based on an outline permission granted by the LDDC to Olympia & York Canary Wharf Ltd in 1992, prior to JLE authorisation.

Although the scale and type of development in these outline permissions was established as far back as 1987, the possibility of speculation by the

developer about the likelihood of the JLE being built cannot be ruled out.

The JLE does enter the picture in relation to the design of development and in particular the amount of parking provision. The LDDC was relaxed about the amount of parking included in the original outline consents and paid little attention to the changed circumstances brought about by the JLE in terms of higher public transport accessibility. This was despite objections by the LB of Tower Hamlets.

The transfer of planning power from LDDC to the Borough seems to have prompted a rethink as shown by an application in March 1997 to the LB of Tower Hamlets for the redevelopment of site WF9, on the north east side of Westferry Circus. The application sought 22,333sqm of office floorspace with 112 car parking spaces. Permission was granted in September 1997, but after extensive negotiations the number of car parking spaces was reduced to 20.

Informing this change towards lower levels of parking provision were studies commissioned by Canary Wharf Ltd. The Traffic Impact Assessment estimated that the car mode share before the JLE opened would be 25-30% falling to 18% after opening. The applicants followed the logic that more parking would be required to serve new development, but that this could be reduced once the JLE was open. In 1992 an application for a temporary car park had therefore been granted for five years by the LDDC, which accepted these findings. The permission was extended in 1997 for a further two years to 1999.

It can therefore be concluded that the JLE had a significant impact on parking provision at Canary Wharf, and that it was the Borough rather than the LDDC that actively responded to the new accessibility levels brought by the JLE. The LDDC's acceptance of high parking levels even as late as 1995 is perhaps more a reflection of the precedents already established on the site rather than the developer's reliance on these levels of provision to ensure project viability.

The other issue concerns the timing of the development. Although outline consent had been given in 1987, and renewed and revised at intervals during the 1990s, take up on site did not occur until the late 1990s, and by March 2002, the southern site (Phase 3) had still to be developed. The JLE can also be seen to have influenced the timing of this development, although it was not the driving force behind it. Economic circumstances and the collapse of the development company were important contributors to the delays in development activity.

Case Study CF3

West India Quay, Hertsmere House

The site is about 400-600 metres from the JLE station, but is more conveniently served by the DLR at West India Quay. The walking route between the JLE and the site is reasonably direct, but far from clear to the visitor.

The eastern part of the site – adjoining West India Quay station – will be West India Quay Tower, a 32 storey residential tower. By March 2002 this was being developed by Multiplex Developments and MWB Architects.

The remainder of the site is a converted warehouse that includes A1, A3, C3 and a museum. This originally LDDC approved scheme is reaching its final phase. The conversion is entitled Port East, West India Quay. The museum, which will open in 2002, is on five floors in the western half of the Grade I listed Georgian warehouse. It will include 12 galleries, function suites, restaurant and shops. It is being developed with funding support from Heritage Lottery, DTLR/LDDC, Corporation of London and the Port of London Authority. The eastern half of the main warehouse is more mixed with residential on top of bars, restaurants, health club, cinema and parking. The westernmost part of the site is now a JD Wetherspoons public house.

The type and scale of development on this site is in general accordance with a 1991 masterplan prepared by a subsidiary of Olympia and York, the Canary Wharf developers. The concept was to develop the sites as a mixed use area to complement the office and commercial activity occurring at Canary Wharf. The original LDDC permission in 1991 established the mixed use, high density character of the site, though some elements changed through subsequent permissions.

There is no evidence that either the planning or timing of the development of this site was related to the JLE programme.

Case Study CF4

Heron Quay Docks

The case study site covers elements of the Heron Quay development that is being created on this former quay. The site is adjacent to the JLE station at Canary Wharf, but the other side of West India Dock, so that pedestrian walking distances are greater than they first appear. The site has its own DLR station.

By March 2002 five office towers were under construction, and this represented what may be regarded as “third generation regeneration”.

Following closure of the docks, the first regeneration schemes emphasised residential uses and single story offices. A 1991 Enterprise Zone application marked a change to higher density and greater emphasis on office use. In 1997 a further consent (as now being built) provided for still higher density, and almost exclusive office use.

This transition can be linked to the development of transport infrastructure, first the DLR, and its upgrading around 1990, and then the JLE.

The evidence is particularly strong in relation to the JLE. The 1991 application sought a flexible permission which allowed the proportion of each use to fluctuate according to whether or not the JLE station was built. A special “Jubilee Density Agreement” permitted 28%-100% commercial office development and 0-70% residential development on the site if the station was constructed but reverted back to the original 1989 EZ consent if the station construction never went ahead. A flexible parking standard was also agreed, and the LDDC accepted parking levels could be lower than its standard in view of the high public transport accessibility offered by the JLE and the DLR.

There are clear links between the construction of the JLE and the form and use of development proposed. The timing does not appear to have been directly related to the JLE, but use of part of the site for JLE construction works prevented take up of the development permissions until the JLE was completed.

Case Study CF5

Hutchings Wharf Docks

The site lies 800 metres crow-fly distance from the JLE station, but the actual walking distance is considerably greater. The DLR does not provide convenient linkage to the JLE station. As a consequence this site is not particularly well served by rail services on the Isle of Dogs, but there is a bus which connects the development to Canary Wharf.

Because of its location, it is not expected that the JLE would have had much impact on its development.

The site is occupied by a residential scheme that was completed by 2000. It consists of a 54 flat gated community in three buildings that rise toward the waterfront. The waterside block is ten storeys high. Each

building has its own open space and car parking. The development is sited behind a dilapidated row of shops. However, Hutchings Wharf Riverside Development have bought the centre shop and have put the freehold up for sale. It appears likely that this part of the site will be developed in the near future.

Although the proximity of the JLE station was cited as one of the reasons for permitting development at a density above (then) UDP standards. Parking provision was also above UDP standards, suggesting a rather selective view was taken as to the importance of the JLE. The general pattern of use in the area, and the increasing acceptance of higher densities means that the JLE had only a limited impact on development activity. More direct influences are likely to have been the creation of the bridge link from South Quay to Heron Quay and access to the DLR .

Case Study CF6

Pierhead Lock Docks

The site is 800 metres from the JLE station as the crow flies, but currently the route on foot is almost double this distance. Possible future development of Wood Wharf, which lies between, would allow more direct access.

The Barratt development consists of nearly 100 flats that were completed in November 1999. The highest block is 13-storeys. Both Riverside Court and Crescent Tower won the National Home Builder Design award for 2000 and 2001 respectively.

The case provides little evidence of any direct JLE impact and there was no apparent consideration of public transport issues in the determination of the planning applications.

Case Study CF7

Wood Wharf (additional case study site)

This large former Port of London Authority, now British Waterways (BWB), site lies immediately to the east of Canary Wharf JLE station. It currently has wider water use and dockside development.

A major mixed use development scheme is to be initiated in the period 2004-6. Partner organisations include BWB, London Development Agency, London Borough of Tower Hamlets, and Thames Gateway London (TGLP).

The Wood Wharf redevelopment was granted planning permission in April 2001.

The site currently includes a residential block in the north east of the site. The large warehouse – Lutsmer House - remains in the centre of the development. In the north west of the site is Fulton House a distribution office and to the south of that is the Docklands Telecom Centre. All the units, bar the main warehouse, appear active and relatively new/good condition. Redevelopment is likely to include major improvements to pedestrian access between Canary Wharf JLE station and sites to the East (see Pierhead Lock Docks case study above).

The conclusion from this site is that that redevelopment of uses that remain viable is a clear indication of the development value generated by the arrival of the JLE. As with the Millennium Quarter already discussed, the higher degree of public transport accessibility, together with the critical mass presented by existing developments at Canary Wharf have led to a step change in the development aspirations for sites such as this close to the JLE station.

5.7 *Canning Town station catchment*

All the case study sites are in Newham except CT6 Brunswick Wharf, which falls within Tower Hamlets.

Case Study CT1

Barrier Point

This site lies about two kilometres from Canning Town JLE station, about a 25 minute walk along a heavily trafficked route with little frontage development. In short, walking to the station would not be considered an option, certainly not by the occupiers of housing on this site. The site is relevant only in so far as feeder services might be used to access the JLE.

This complicated case study site can be divided into four parts, following a review in March 2002.

- 1 The western parcel is an active storage/warehousing “park” known as Kirkbeck Business Complex. This park currently has spaces to let ranging from 10-95000 sq ft.
- 2 Bordering Kierbeck Business Park is a second distribution and warehousing complex at Crescent Wharf that again is active and occupied but similarly is in poor state of maintenance.
- 3 To the east of this park is the site of the former Minoco Wharf oil depot. The site is vacant and derelict at present and is being de-contaminated by WSP Remediation. The site is 5.98ha and is owned by Shell. It falls within the 1997 Adopted Newham UDP and 1999 Deposit Draft planning frameworks. This guidance shows it as a principal employment site, which encourages the retention and expansion of industrial, warehouse and other B1 uses but resisting residential or retail. It has Protected Freight Wharf designation and is a potential location for the provision of a riverbus service. The development proposal set up by Shell through Drivers Jonas sees the opportunity to set up a high quality employment or mixed use development that benefits from the river frontage. The frontage of the site is subject to a CPO to facilitate the construction of the City Airport/Silvertown DLR link. Drivers Jonas are marketing the site to sell it as freehold.
- 4 A new DLR station will be located nearby at Pontoon Dock which forms part of the eastern most element of the case study site. The eastern element of the site is taken up by the landmark residential development by Barratts – Barrier Park. This

includes 'The Tower' in the south eastern corner – just outside the case study boundary. This 16500 sq ft development has penthouses and restaurants included. Just to the east of the tower is an area of open space designated for residents and known as Thames Barrier Park. The front of the site is London Development Agency land which is being marketed by Tradewinds to form the Pontoon Dock station for the new DLR extension.

Factors other than the JLE are seen as more influential on this site. These include the riverside and Thames Barrier views, which have made housing marketable despite the remote location, the adjacent open space, and the easy access to the main road network. The new DLR station on the airport spur will also provide better public transport access.

Case Study CT2

Limmo site

This site is the most accessible to the JLE of all the Canning Town case study sites. Other things being equal, if the JLE was to spur development in this part of east London, then one would need to look for evidence of this here. Prior to 2000 there is evidence that the proximity of the Dome (one stop on the JLE) was regarded as a factor likely to have a positive impact on the development of the site. It is not clear that this has been the case.

The conclusion from this case study is therefore that it provides evidence of the gap between the development and regeneration aspirations of the borough, and the willingness of developers to invest. The site would be one to monitor in the longer term.

The update in March 2002 highlighted the following aspects of the site.

- The 5.1 ha site is owned by the former British Railways Property Board and others – now Spacia. It was used as a contractors compound for the JLE. It is within the Canning Town SRB and has Intermediate Assisted Area Status. It is part of the Major Opportunity Zone – with Thames Wharf – and high quality mixed use would be permitted (i.e. desired) with B1, B2 and leisure uses.
- The site is seen as the western gateway to the area, though it is not entirely clear what this means. The revised UDP promotes a mixed use high quality development of B1 (business), B2 (general industrial) and leisure. The site will be available for development in the medium term – 2/3 years.

- B2 and B8 uses were proposed with an estimated final floorspace of 20,000 sq m. This was due to start in 2001 and end in 2002 but no such activity has occurred. (Source DETR Thames Gateway Review)
- In 1999 LBTH sent a memo relating to the site's use as a park and ride facility for the Dome – planning permission was granted under conditions – but this apparently was not followed through, perhaps because demand for access to the Dome turned out to be half of the forecast.
- In March 2002 the land was vacant scrub with a vent shaft for the JLE on site. It may be in use as an educational eco-centre, but there is no evidence of this on site.

Case Study CT3

6 Oak Crescent

This small residential site lies about 300 metres north of Canning Town JLE station, and consists of seven private residential units.

There is no indication from available material, the planning history or timing of development that the JLE had an impact on the development of this site. Indeed the negotiations regarding the site, the latest of which occurred after JLE authorisation, worked in the opposite direction from what might be expected in terms of public transport oriented development. The number of dwellings on site was reduced so that the Boroughs (then) minimum parking standards could be met.

The site was fully developed and occupied at the time of the baseline study.

Case Study CT4

Silvertown Way - Peto Street

The site is home to a Holiday Inn Express – an 88-bed hotel over four floors with a restaurant. The transport motel in the south portion of the site remains. It is in a decrepit state, however, and presents a further development opportunity on the site.

The proximity of Canning Town station to the site (250 metres) was used by the applicants as the justification for the uses sought in this location. A succession of applications for motel or hotel uses on this site indicate a shift from lower to higher quality accommodation aimed at the business user. Whilst it is not apparent from available evidence that this change was related to the JLE, the interest in the site by Holiday Inn Express as a hotel suggest an increase in demand, and this may be related to the JLE. However, it should be noted that the timing of the scheme related also to the Excel exhibition centre nearby; another potential boost for business hotel demand.

The final application did not include redevelopment of the hostel on the site, as hoped for by the Borough at the time. Parking was reduced in view of public transport access to the site.

The overall conclusion is that while the evidence of JLE impact is weak, the development is in keeping with Borough planning policy for the area, and consistent with the principles of public transport oriented development.

Case Study CT5

Bidder Street & Stephenson Street

This is a large site about 200-700 metres north of the JLE station at Canning Town, although it is separated by a major road and flyover.

It is not really a single site, and can be divided into a number of sections (at March 2002):

- 1 The part enclosed by Bidder Street remains as active light industrial use/storage/ warehousing with some variations on the theme including a scrap yard and Turkish Baths.
- 2 The land in the far south eastern corner (nearest the station) is being used as a road construction depot for the improvements to the road above.

- 3 On the opposite side of Wharf Side Road is the area designated as Crown Wharf. This is currently still occupied by warehousing, however there are significant aspirations for the site. This site was previously a saw mill and timber yard that has been vacant for sometime. The Newham UDP designates it as a principal industrial area with the following policies having relevance:
 - Policy EMP4 – local planning authority will sanction the retention/expansion of industrial and warehouse uses;
 - Policy EMP5 – proposals for new B1 development should be designed flexibly to accommodate servicing/parking for whole range of uses within class B1;
 - EMP6 – adverse industrial development not permitted;
 - OS3 – development must be consistent with Lea Valley Regional Park Plan.
- 4 There is however, the possibility of the site being re-zoned for residential or leisure with some ancillary retail. The site is offered as a freehold subject to a number of short-term leasehold interests. The freehold is owned by Monnberry Ltd. Much of the site has been used in association with the A13 Trunk road widening works since July 2000.

The site is within the Canning Town SRB and Euro Funding Objective 2 areas. The council is seeking a high quality flagship development that reflects the site's location. The following uses are deemed acceptable – B1, B2, B8, business, community or leisure facilities with links to adjoining sites with footpath/cycle routes provided along the Lea.

The site should be available for development in the medium term (2-3 years).

Further elements of the case study site include an active and environmentally unattractive scrap yard to the north of the Crown Wharf site and the remainder is under construction as Electra Park.

The Electra Park development of 220000 sq ft floorspace comprising units from 10000 sq ft upward will be a development of industrial warehousing. An entrance has been created from the north eastern corner of Bidder Street which will form a boulevard with two large units on either side. A total of ten warehousing and light industrial units are to be built on the 13.5ha site. Electra Park has been developed by Harbour Land which is the property arm of Schroder banking group. Some of the

units will be taken by contractors servicing the nearby EXCEL exhibition. At the river end of the site a raised square that adjoins a walkway along the Thames will be provided.

The lack of large scale development on the Bidder St/Stephenson St site and the lack of evidence of any major commercial development in the immediate vicinity of Canning town station suggest that the JLE has had little impact on the development market. Development interest so far has been primarily for industrial or warehouse use which is regarded as largely unrelated to accessibility offered by the JLE.

To address this, Newham have committed themselves to improving the site and its linkages with the new stations. Consequently, the JLE has been a major part of a series of public sector initiatives to raise the profile of the area.

Case Study CT6

Brunswick Wharf

This site is around 800 metres as the crow flies from the JLE station. But, and it is a very large but, access to it on foot is all but impossible due to the presence of the river Lea. Access to the JLE is practical via the DLR, however, which is one stop away.

The former Brunswick Wharf development now known as Virginia Quay was approved by LDDC in December 1997. By March 2002 Phases 1 & 2 were complete with 3 & 4 under construction. The scheme consists of 620 flats and 3 storey town houses. Flats are in blocks of up to 14 floors and include a restaurant and a site for a new school. The Barratts scheme was started in Spring 1998 and is due for completion in 2002.

Development aspirations for the site changed between the late 1980s and early 1990s. An earlier route for the JLE was to pass through this area with a station providing direct access to London Bridge and Waterloo as well as Canary Wharf. The aspiration was for the site to be an extension of the Canary Wharf business location. The announcement of the final JLE route in 1991, however, took it on a more southerly course to serve the North Greenwich peninsula, thus leaving the Brunswick site without access to the JLE. This is likely to have impacted negatively on the viability of the site as an office location. However, this also came at a time when the office market had begun to rapidly decline and speculative office development in the Canary Wharf area as a whole had almost ceased. It is therefore difficult to gauge the relative impact of each turn of events.

The conclusion is that the decisions about the JLE appear to have influenced the course of events on this site. The lower level of public transport accessibility finally agreed is probably adequate for the (final) residential use of the site, but would have been insufficient to support it as an office location. Whatever the influences, this was the outcome.

Case Study CT7

Victoria Docks

This large site at the south western corner of the Royal Victoria Dock is about 1200 to 1800 metres from the JLE station, and partly opposite the Barrier Point case study site already discussed. As with that site, walking to the JLE station is not an attractive option, but there are buses through the site itself which link to the station.

By March 2002 the site was fully developed with housing and few ancillary facilities.

The history of applications and development on this site reflects the state of the property market during the 1980's and 1990's, in particular with a shift from commercial to residential-led development. There is little evidence that the construction of the JLE had any impact on the decision or timing of development on the site. The scheme that was finally implemented had many similar elements to the original 1988 proposal before the JLE route was confirmed.

The overall conclusion is of no major JLE impact other than its presence as an additional marketing factor for the new dwellings.

5.8 *West Ham Station Catchment*

Case Study WH1 –

Rick Roberts Way

This site lies 1100-1400 metres walking distance from West Ham station, involving a tortuous route with an extremely unpleasant and unsafe environment. There is a pedestrian only route which cuts the distance to 800 metres. However, the route is through derelict land and is poorly maintained. As a result this route is not perceived as sufficiently safe to be a realistic option to use.

Consequently, until such time as a new direct and properly designed link is available to link the site to the JLE at West Ham, it is not realistic to expect that the JLE had any impact on development. The development that has occurred is mostly business use and clearly relates to the road network rather than to public transport services.

At March 2002 the site had been transformed with the building of Rick Roberts Way from north to south across the site joining the old Union Street and Abbey Lane as it curves to run along Channelsea River.

Within the site there have been three large units constructed. Two (in the north and centre of the site) belong to Kesslers International and include delivery facilities and extensive car parking up to the tube depot/river edge in the east. These high quality units include offices to service their main industrial function.

The third unit is occupied by a BMW showroom and repair centre in the southern part of the site located between the river and the gas depot.

The western part of the site (bounded by the new Rick Roberts Way) had yet to be developed but there was evidence of site preparation under way (soil decontamination).

A number of factors may have combined to influence the development including support and funding by the Stratford Development Partnership and English Partnerships with regards to site and access preparation. The development by Kesslers was linked to operational requirements rather than the JLE.

The overall conclusion is that the JLE had no influence on the type, scale, or timing of development on this site.

Case Study WH2 –

Bromley by Bow Gas Works

This large site lies between 500 and 1500 metres from West Ham JLE station. However Bromley-by-Bow District station is closer (about 4 minutes walk), giving direct access to the City as well as the West End.

For the review in March 2002 the site is split into several distinct elements that cover a range of uses and states of development.

- 1 The northern part of the site – north of Twelvetrees Crescent remained a Transco compound and gas works – the holders are grade II listed structures.
- 2 South of Twelvetrees Crescent there were some completed parcels and some that remained under construction or were awaiting development. This area was to be turned into Prologis Park.
- 3 To the west of the southern spur of Twelvetrees Crescent is the large Dudleys warehouse/depot and distribution centre with associated servicing and car parking – this relatively recent construction was built over the old London Gas Museum.
- 4 The area south of Twelvetrees Crescent that is not within the Dudleys depot is being constructed as Prologis Park by Fitzpatrick. Two units have been constructed and a further two or three were being built. Those being built include Unit B which is 140,800 sq ft of industrial warehousing that will be available Summer 2002. That already built includes Unit C which is a smaller 14,000 sq ft industrial warehouse with 30% office space.
- 5 North and east of the southern spur of Twelvetrees Crescent is an area of land with a variety of uses centred on the Memorial Gardens. Part of the site is a depot, part is vacant and part is a construction site. The old gas works company building also lies vacant adjacent to the gardens. Bromley by Bow gas works and Memorial gardens are designated (in the UDP) as sites of nature conservation where development will be resisted.

The development of the site for employment purposes reflects UDP policies and there is no evidence that this was influenced by the proximity of the site to the JLE station. In developing a comprehensive

strategy for the site the local authority did not include the JLE as a factor that needed to be addressed. Contributions are likely to be required towards local public transport links to enable reduced reliance on the car for staff on the site, but this again is not specifically a JLE impact.

Case Study WH3 –

Channelsea Business Park

This site is close to West Ham station but with somewhat awkward access between the two. Although the main site entrance is from Canning Road, there is also an unofficial entrance via Crowe Road that runs along the railway line above West Ham Station. As with all the West Ham case study sites, considerable remodelling of the local road network will be required to allow new development effectively to address the West Ham interchange.

The March 2002 position was as follows:

The Channelsea site also represents a complicated land parcel with a variety of existing uses and proposals in the pipeline.

- 1 The north eastern part of the site is the active Abbey Trading Point which is a series of light industrial, storage, distribution and warehouse outlets some of which are in the process of being refurbished. One unit is for sale but there are no signs of development activity in this part of the site.
- 2 On the western side of Canning Road is a vacant building on a semi-derelict site but there are no obvious development opportunities.
- 3 The site is split by the east-west Greenways bridleway that overlooks the larger southern portion.
- 4 In the western half of the site are the only significant buildings (used as offices), based around Channel Sea House. Adjoining this office block are a small number of light industrial units.
- 5 On the eastern half of the site is a major electricity pylon, which will hinder development of that part of the site. To the south of the pylon are a series of one-storey buildings that are actively being used but the use is unknown. The remainder of the land is vacant scrub.

An application was lodged towards the end of 2001 for a change of use of the existing small office buildings (plus a new extension) to a place of

worship. This followed a 1999 outline application for the Redevelopment of the site for mixed-use development comprising B1/B2, D1, A1/A3, C3, C1 use. The application was submitted by a local Muslim Trust who intend to use a large part of the development for religious and cultural purposes. The development includes a mosque with potential capacity for 2,500 people, with an additional medical centre (25,000sqm), education study centre (6,000sqm), B1 and B2 office use (16,000sqm) and guesthouse / hotel with adjoining open space.

The council's aspirations for the area are to capitalise on proximity to the JLE and ensure comprehensive high quality schemes development. Negotiations were continuing into 2002 to secure the best possible scheme.

Overall, the JLE has had an impact on the planning of the area, but development interest has not immediately been in tune with the Council's aspirations as set out in local framework plans (see policy section of the report).

Case Study WH4 –

Manor Road: Pretoria Goods Yard

This site lies 500 metres south of West Ham station and contains a completed residential scheme.

There is little evidence of any JLE impact on this site. The development took place in the early years of the JLE's development with permissions being granted before the commitment had been made to the construction of the route. It is likely that for this reason and the incremental manner in which the site was developed there was little consideration given to its proximity to the proposed station from either the applicants or the Council.

6 *Development Impact of the JLE*

6.1 *Introduction to Section 7*

6.1.1 This section analyses and summarises the findings of the Development Activity report. The principal question for this study was “What impact has the JLE had on development?” This is a simple question, but there is no simple answer. This section breaks down the broad question into a number of more specific and manageable questions. It provides analysis that as far as possible draws on all the evidence available from the earlier sections of this report.

6.2 *Methodological issues*

Time and timescale

6.2.1 During discussions as part of the research programme it was suggested that with the opening of the JLE only two years prior to the study, too little time had elapsed to judge development impact. For developers, however, the authorisation of the JLE (as well as the opening of the line), was significant. Eight years had elapsed between authorisation and the baseline study. and the local planning authorities had had at least six years in which to adjust policies and plans to take account of the higher levels of accessibility that the new line would bring. On this basis it was decided that the authorisation date (1993) was indeed the significant date from which to measure development response.

6.2.2 A further point raised was that the period between the first and (this) second Development Impact Study was relatively short (about three years). For this reason the second study reported here was delayed by a few months to allow consideration of revised UDP policies that became available in early 2002.

6.2.3 The actual impact on development that occurred must be considered in relation to what might have been expected, given a range of factors such as the nature of the JLE, development and property market trends, and so on. Although the expected influence of these various factors is to a large degree a matter of judgement, the analysis includes an attempt to summarise such factors.

6.2.4 Development impact can be examined in terms of the short, medium and long term, and the following might have been expected:

Post authorisation

- Short term (1-3 years) – developer interest in preparing or acquiring sites for development that would benefit from higher accessibility. Planning authorities considering impact on strategies and policies
- Medium term (5-6 years) – developers bringing applications forward to enable development to coincide with opening of the new line;

Post opening

- Short term (1-3 years) – rising property rents and prices and more intensive occupancy of buildings as people capitalise on better accessibility; developers make early risk/opportunity assessment and some projects brought forward;
- Medium term (4-6 years) – More robust assessment of risk and opportunity backed by experience of higher accessibility levels and of early occupiers;
- Longer term (7+ years) - Readjustments throughout the development market to consolidate on accessibility changes, and possible reaction to provide further public transport facilities.

6.2.5 Of interest to this study is the potential for difference between developer and planning authority timescales. The case studies and policy review reveal, for example, the differing speed at which developers, the LDDC and Tower Hamlets revised their policies on parking standards in response to the JLE. Another example is the apparent slow response of developers to regeneration opportunities in the Lower Lea Valley brought about by new planning policies and regeneration strategies.

6.2.6 A further possible complication concerns capacity in the development industry. If it is accepted that the JLE created many new areas of high public transport accessibility in inner east London, is it likely that the development industry would respond in equal measure to each of these opportunities at the same time? It seems more likely that the response would be felt in some locations more immediately than others. It remains a possibility, therefore, that the apparently slow rate of change in the catchments east of Canary Wharf could pick up once sites in the other catchments have been fully taken up.

Non JLE factors affecting development changes

6.2.7 This is probably the most difficult issue to deal with in a study of this kind. Four aspects were seen as being potentially important:

- Fluctuations in the local property and development market over time. The LDMS analysis and the case studies provide a reasonable picture of the effects of these fluctuations relative to the effects of the JLE programme;

- Comparison with changes in development in non-JLE areas. This is dealt with in the LDMS analysis through the use of reference (control) areas;
- Impact of changes in planning policy generally. This is dealt with in the policy review section of this report.
- Impact of other transport improvements, notably the DLR. Quantification of the relative impact of different public transport improvements or facilities was beyond the scope of this study. The issue is raised in the various analyses, however.

Quantification of impacts

- 6.2.8 There is a large and growing literature on whether transport infrastructure projects generate economic growth, but there is controversy about the methods used, and often about the conclusions reached. Within the Lower Thames Valley, for example, studies have been undertaken to try to establish whether new river crossings can be justified in terms of positive economic impact.
- 6.2.9 For the purposes of this study, a more qualitative approach is regarded as appropriate. The main purpose of this Development Activity study is to examine what has happened in the JLE corridor in terms of planning policy, planning applications and decisions and, within the limits of the timescale being examined, development taking place on the ground.

6.3 ***The ratchet effect***

- 6.3.1 Land use and transport are inextricably linked. This has often caused difficulties in trying to pinpoint whether transport leads development, or vice versa. The answer can be both, either at the same time, or at different times. There are powerful examples of this in the JLE corridor.
- 6.3.2 The Isle of Dogs provides a classic example of how development followed transport provision, then created demand for transport which required expansion of the transport system, which in turn then attracted or allowed further development, and so on. This may be described as the ratchet effect, with each expansion of either development or transport leading to an expansion in the other.
- 6.3.3 A similar process is about to be launched at Waterloo, where development potential is identified at least in part as a result of major transport investment (JLE and Waterloo International), only to be held to require further expansion of public transport capacity in order to cope with the demand that such new development will generate.

6.4 *Regeneration or transport - what impacts were expected?*

- 6.4.1 Before setting out to analyse the development impact of the JLE, it is reasonable to ask what impacts might reasonably have been expected. First and foremost the JLE was seen at the time of its planning and authorisation as a catalyst for the regeneration of London's Docklands in general, and of the Isle of Dogs in particular. The JLE was not approved on the basis of its benefit to cost ratio; in fact other rail schemes in London had been shown to perform better in cost benefit terms. It was approved because of a political imperative at the time to ensure the success of major commercial development at Canary Wharf.
- 6.4.2 A contribution towards the cost of the line was made by the developers of Canary Wharf, but despite the trumpeting of this agreement it amounted to a small proportion of the cost. Even so, it was evidence of an expected increase in land values that the JLE would bring about.
- 6.4.3 But it was not just about Canary Wharf. The routing of the line was chosen on a southerly route to cross the river (twice) to serve the derelict North Greenwich peninsular, and thence Canning Town and West Ham. Neither of these locations could supply enough passenger demand to justify the cost of the line and stations until and unless they became the focus of major development and regeneration.
- 6.4.4 Alternative major rail projects had been discussed whose justification was more based on the relief of overcrowding on commuter rail services and the reduction of road congestion. The Crossrail project was a case in point, and other Underground extensions were also considered. The rejection of those alternatives in favour of the JLE serves to underline the priority given to development and regeneration rather than the easing of transport problems.
- 6.4.5 Despite the priority given to development and regeneration, no specific expectations were set out, with the exception perhaps of Canary Wharf. Was it expected that provision of the line and stations would be sufficient to produce a major impetus to development in the corridor? Or were the Canary Wharf benefits, together with transport benefits at Stratford and Waterloo, regarded as sufficient reason to go ahead with the project? Because the final decision on the line was taken at the highest political level, the reasoning may not be known for many years, if at all. But we may conclude that if the JLE did not enable or spur development and regeneration of the derelict areas through which it passed, then most people's expectations or hopes would not have been realised.

- 6.4.6 To the extent that greater public transport accessibility attracts development, these expectations of the JLE as a regeneration catalyst may be realistic. But there are other factors which suggest that one should be a little more sanguine about the regeneration prospects at locations such as Canning Town and West Ham. Development and regeneration in these areas may be difficult or slow to achieve without a significant injection of public money for infrastructure and site preparation, as was available in order to kick start Canary Wharf and the Millennium Dome.
- 6.4.7 There are other development impacts that might have been expected, though there is less evidence to suggest that they were. These concern the nature and style of regeneration that would occur with the JLE compared to what could be expected without such high-level public transport accessibility. At Canary Wharf it was becoming clear that the maximum development potential could not be achieved unless a substantial majority of employees and visitors travelled to the site by means other than the car. The provision of an Underground line linking both to Central London and to potential labour supply areas was seen as a way of enabling high density commercial development, by minimising the space required for roads and parking. The relative shortage of land on the Isle of Dogs resulting from the presence of the docks themselves may have been a factor generating awareness of this issue.
- 6.4.8 There are other ways in which it might have been expected that the JLE would influence the pattern of development. This can be summarised under the term “Public Transport Oriented Development”, and includes the far from new principles of:
- Higher densities around stations, declining with distance from the station;
 - Mixed use and non-residential development at nodes in the network;
 - Lower parking provision at developments well served by stations hence allowing more intensive use of available land;
 - Restructuring of other public transport systems to support and provide feeder services to stations, thus extending the effective catchment areas of stations.
- 6.4.9 Each of these development expectations is included in the discussion that follows.

6.5 *The changing policy framework*

- 6.5.1 The policy review as part of this study found that the east London Boroughs either had or were in the process of strengthening their planning policies to encourage public transport oriented development.

Changes that had occurred following the JLE were particularly evident in areas which hitherto had not shared in the regeneration trend found at Canary Wharf.

6.5.2 Conclusions from the JLE policy review more specifically are:

- Greater commitment is evident to public transport oriented development with higher density mixed use development being planned for all the stations from Canada Water eastwards. There is some evidence that accessibility is beginning to play a bigger role in the determination of building densities, land use, and parking standards. At Canary Wharf this is merely building upon policies already well established prior to the JLE, but at the other stations such extra planning policy commitment is likely to be a pre-requisite to bring about significant development change.
- The motivation for the policy change appears to have been conformity with Government policy guidance, but the specific interpretation of this guidance in the JLE corridor is a response to the accessibility gains brought by the JLE.
- Policy at the more detailed level such as “station area plans” has been slow to emerge. There is still considerable scope to produce detailed development plans to achieve optimum integration between new development and JLE stations. Access on foot to the JLE stations, for example, is an issue that could be addressed through S106 contributions, but this has not been widely used.
- Despite some attempts to promote higher intensity development at the JLE stations, for example at Southwark and North Greenwich, this has not occurred. This seems to have been because of a mixture of lack of developer or local authority interest. This means that the most accessible sites have not been exploited. This is in contrast to Vancouver’s Skytrain, for example, where development over stations has taken place, even despite the fact the railway is above ground. To the promoters of that scheme the single storey JLE station structures at Southwark, Bermondsey, and Canada Water, for example, must look like missed development opportunities.
- A key determinant and indicator of the share of access handled by public transport is the amount of parking provided. The case studies reveal that policies to limit the amount of parking in new development have been slow to take hold, despite Government guidance being in place since the time of JLE authorisation. The LDDC and the boroughs continued to apply minimum standards of provision, and in some cases to request higher levels of provision

than the developers themselves wanted, in direct contradiction to guidance in Planning Policy Guidance note 13 (Transport)³¹

6.5.3 It is concluded that the strategic planning policy in the JLE corridor is increasingly in tune with the theory of public transport oriented development, but that the detailed policy and practice that would allow implementation of this strategy is slow to emerge.

6.6 *Development changes in the JLE corridor*

6.6.1 The study employed two main strands of evidence of changes that occurred in relation to land and property development:

- **“Hard” evidence** of development demand and activity using the LDMS planning application database, and a series of case studies of planning histories of particular sites;
- **“Soft” evidence** including an analysis of policy change (in particular the revision of the relevant Borough UDPs), and interpretation of events and forecasts based on articles, interviews and discussions during the course of the study. The role of the JLEISU study team at the University of Westminster and the steering group is acknowledged in this respect.

6.6.2 The evidence collected is reported in more detail in the foregoing sections of this report, but in this section it is used to inform an analysis of development changes presented by catchment and sector.

Indicators of change

6.6.3 The following are considered to be important potential indicators of development impact, and these are explored through analysis of the planning applications (the LDMS database) and of borough planning policies:

- Private sector development interest;
- Planning authority policy and practice;
- The scale, type, use and timing of new development.

6.6.4 Other indicators of interest, and referred to in the case studies are:

- Characteristics of development in terms of accessibility (e.g. orientation towards JLE stations, response of parking provision to JLE accessibility);
- Regeneration and reuse of sites;
- The quality and environmental and social attributes of development (e.g. does it impose on or contribute to housing affordability, local

³¹ PPG13 Transport, March 1994, para. 5.5.

economy or local community). This is largely beyond the scope of this study but the conclusions drawn may help to inform a judgement on these aspects.

- 6.6.5 The table below summarises some key parameters that would affect the potential for development.
- 6.6.6 Column 2 shows the degree to which the JLE *added* to public transport accessibility, i.e. the relative increase in accessibility. It may be noted that the relative increase is high for all catchments except those that were already significant nodes on the public transport system (see Column 5).
- 6.6.7 Column 3 refines this in terms of increased access specifically to central London, which is regarded as the principal passenger destination, and hence the factor most likely to influence development interest.
- 6.6.8 Column 4 summarises the prospects for being able to attribute any development increase specifically to the JLE. This mostly corresponds to Column 1, but Southwark is complicated by the fact that while local access to the Underground has significantly increased, the catchment overlaps with Waterloo, and the walking catchment of the City. It is therefore less easy to attribute development to the JLE in this location.
- 6.6.9 Column 5 shows whether the catchment is served by a public transport node or interchange (i.e. intersection of two or more rail lines) as opposed to a station on a single line. This is regarded as important in determining the type of development impact that might be expected or hoped for. Nodes provide better “inbound” accessibility from a range of origins and are thus well suited to land uses and activities that depend on drawing people from a wide area, such as employment and major retail and leisure facilities. Single line stations are less suited to such development, even though they provide good “outbound” accessibility for residential uses (dwellings in particular, but also hotels and hostels).
- 6.6.10 Column 6 gives an overview of the development potential. The two sub columns loosely distinguish catchments that are mostly fully built-out (requiring demolition or conversion of buildings to extract development value), and catchments that include significant “open sites” such as vacant or derelict land, or land that is in marginal use such as temporary car parks or scrap yards.

Table 7.1 Access changes and development potential in the JLE corridor

1	2	3	4	5		6	
Station	JLE PT access increase	Increase in access to Central London	Potential to attribute change to JLE access?	PT node		Regeneration potential	
	Compared with before	Compared with before		Before	After	Conversion; change of use	Major open sites
Westminster	High	Low	No	No	Yes	Low	None

Waterloo	Medium	Low	Limited	Yes	-	High	None
Southwark	High	Medium	Limited	No	No	High	None
London Bridge	Medium	Medium	Limited	Yes	-	High	High
Bermondsey	High	High	Yes	No	No	High	None
Canada Water	High	V High	Yes	No	Yes	High	High
Canary Wharf	High	High	Yes	No	Yes	High	High
Nth Greenwich	V High	V High	Yes	No	No	*	High
Canning Town	High	High	Yes	No	Yes	High	High
West Ham	High	Medium	Yes	No	Yes	Med	High
Stratford	Medium	Medium	Limited	Yes	-	High	High

* Millennium Dome only

Interchanges, catchments and development potential

- 6.6.11 Part of the increased accessibility brought about by the JLE is due to interchange possibilities with other public transport services. The JLE created five new nodes or interchanges on the London rail system – Westminster (District and Circle Line), Canada Water (East London Line), Canary Wharf (DLR), Canning Town (DLR), and West Ham (District Line).
- 6.6.12 In addition, major new bus interchange facilities have been provided at two of these, namely Canada Water and Canning Town, and also at North Greenwich. It is interesting to note that these bus interchanges coincide with those JLE catchments that extend beyond the area that can reasonably be served on foot, and where access to the JLE station is dependent upon feeder public transport services.
- 6.6.13 Canary Wharf catchment is also considered to depend on feeder services from the southern half of the Isle of Dogs, but existing DLR and bus services fulfil this role.
- 6.6.14 Development potential is also influenced by whether a station is an interchange station (where by definition different public transport routes meet) or a “single line” station. The crucial difference is that a single line station generally speaking will be less attractive to non-residential development, which must be accessible from a range of origins. The interchange stations can therefore be expected to have a greater likelihood of attracting non-residential development, while the development potential around single line stations is likely in the main to consist of residential development. This distinction is, of course, less clear where single line stations are close to major interchange stations, such as at Southwark/Waterloo.
- 6.6.15 The ability of interchange facilities to influence accessibility and hence perceived development potential must refer not only to the quantity of services offered, but also to the quality of the interchange experience. The time and effort required to interchange between public transport services is known to be a major deterrent to public transport use. The Table below provides a subjective analysis of interchange quality on the

JLE. The expected development type, based on the reasoning just described, is entered in column four.

Table 7.2 JLE interchanges and their quality

Station	Rail or bus interchange	Quality	Expected development type close to station
Westminster	LT rail and local buses	High quality station, reasonable interchange	Mostly non-residential
Waterloo	National and LT Rail and local buses	Long walks between LT line platforms involving use of stairs. Good bus interchange.	Mostly non-residential
Southwark	Local buses	Interchange with bus not a feature	Residential, but proximity to Waterloo creates potential for non-residential
London Bridge	National and LT Rail and local buses	Long walks between LT line platforms involving use of stairs. Reasonable bus and rail interchange. Poor station environment	Mostly non-residential
Bermondsey	Local buses	Interchange with bus not a feature	Residential
Canada Water	Buses restructured to serve new interchange	Good rail-bus interchange	Both residential and non-residential
Canary Wharf	DLR and local buses	Long walks between facilities	Mostly non-residential
North Greenwich	Buses restructured to serve new interchange	Good rail-bus interchange	Both residential and non-residential
Canning Town	Buses restructured to serve new interchange	Good rail-bus interchange	Both residential and non-residential
West Ham	National and LT Rail and local buses	Long walk between rail services. Plans to build new platforms serving Fenchurch Street lines	Both residential and non-residential
Stratford	National and LT Rail and local buses focused on interchange	Comprehensive interchange, especially when planned international station is open	Mostly non-residential

6.7 *Key changes in the JLE corridor – LDMS and other evidence*

6.7.1 The analysis of the LDMS database of planning applications and development “starts” produced some fairly robust evidence of greater development interest within the JLE corridor compared to the rest of inner east London, and also of greater development activity.

- 6.7.2 Following a downturn in the property market in the late 1980s and early 1990s, residential development planning applications increased throughout east London. The rate of increase was higher, however, in the JLE corridor than in the rest of inner east London. Development applications within the JLE corridor also were shown to relate to higher density residential development. The accessibility provided by the JLE is likely to have been a factor in both results.
- 6.7.3 Mixed-use development forms a higher proportion of development applications in the JLE corridor than in inner east London. This was true before and after JLE authorisation. While interest in mixed use development increased throughout east London (partly in response to planning policies aimed at promoting this type of development), in terms of the volume of mixed use development started, the JLE corridor increased its share of the total for inner east London from 1994 onwards.
- 6.7.4 Table 7.3 below summarises the evidence of policy and development change for each of the JLE catchments, and extent of the role played in this by the JLE. This follows the indicators set out above. The story behind the table entries is detailed more fully in the preceding sub sections of the report.

Table 7.3 Evidence of policy and development change in JLE corridor

Station	Policy change in favour of PTOD (1)	Increased development interest (2)	Uses developed (3)	JLE role in change (perceived)
Westminster	No	No	-	No
Waterloo	Yes	Yes	Mxd	Supportive
Southwark	(Yes)	Yes	NRes/Res	Supportive
London Bridge	No	Yes	Res/Mxd/NRes	Supportive
Bermondsey	(Yes)	Yes	Res/Mxd	Large
Canada Water	(Yes)	Yes	Res/Mxd/NRes	Potentially large
Canary Wharf	(Yes)	Yes	NRes/Mxd	Large
North Greenwich	Yes	Yes/No	NRes	Large
Canning Town	Yes	Possibly	-	No
West Ham	Yes	Possibly	-	No
Stratford	No	Yes	Mxd/NRes	Supportive
OVERALL	Yes	Yes for commercial & leisure uses. Less so for residential	-	Large role in limited areas

Notes to table

(Column 2 brackets indicate policy revision still in progress)

1. Public Transport Oriented Development, see section 2.3

2. Increased density, intensity, occupancy, regeneration

3. Res = residential; MXD = Mixed use; Nres = non-residential

6.8 *Role of the JLE in these changes*

6.8.1 The difficulty of assessing the role played by the JLE and separating this from the role played by other factors that affect development has already been mentioned. These other factors include

- Fluctuations in the economy and the development market;
- The impact of other transport facilities, notably the DLR and Eurostar services, but also the pre-existing high levels of public transport accessibility at some locations, as well as policy changes;
- Other attractions for developers and occupiers, especially the Thames riverside; and
- Critical mass and confidence in an area, especially where conversion from industrial to residential is involved.

6.8.2 In general it is much easier to distinguish the impact of JLE stations on development changes in those areas not previously served by the Underground. The stations in Central London serve areas that already had both intensive development and an intensive supply and range of public transport facilities. In addition, parts of the central area JLE catchments derive value from factors other than public transport accessibility, for example proximity to the river and/or other major attractions. Similarly, sites may be attractive because they are within easy walking distance of the City of London or other major employment areas, or they may be attractive by virtue of their proximity to South Bank arts facilities. A new Underground station will of course add to the sum total of the facilities available in such areas, but it is more difficult to describe this as a step change in the overall attractiveness (or value) of land and buildings. This is to a degree a pragmatic observation, but it is also indicated by the fact that the JLE is not prominent in discussions and correspondence relating to development proposals in the central London area.

6.8.3 A similar conclusion may be drawn about Stratford, which although not so much of a major attraction in its own right, was a location with high public transport accessibility prior to the arrival of the JLE.

6.8.4 Another factor affects former industrial parts of the JLE corridor mostly eastwards from Canada Water. Development in locations with derelict and often contaminated land and poor environment has to overcome the problem of poor image. This means that there are greater risks attached to development in the early stages, especially for attempts to establish residential development. The lack of “residential infrastructure” such as schools, open space and medical facilities may also hold back such

transformation in the early years. This must be taken into account when considering the lack of development interest found in some of the eastern catchments.

6.9 *JLE impact in each catchment area*

Westminster

- 6.9.1 Within Westminster station catchment there is little opportunity for any redevelopment that would result in increased intensity of uses. The area is mostly “built out” and is subject to a range of conservation and other policies that limit the scope for redevelopment.
- 6.9.2 Of interest, though, is Portcullis House whose construction over the new Westminster station (required because of the JLE) is clearly a “JLE impact”. The Portcullis House development is the only one to utilise airspace over a JLE station, and begs the question as to why this approach was not considered at other JLE stations.

Waterloo

- 6.9.3 There is a strong indication that Waterloo is about to experience the “ratchet effect” described previously. Passenger growth, partly due to Eurostar services, has caused overcrowding and congestion of the station and associated circulation areas. This has led to calls for expansion of public transport services and station accommodation, of which the JLE has been one response. Other proposals are new light rail and bus interchange facilities. However, at the same time there are proposals for major property development at and around the station. While such development would no doubt be needed to fund the transport improvements, the transport improvements will themselves become an imperative because of the extra demand imposed by the new development. There has apparently been little discussion of the long-term outcome of this merry-go-round.
- 6.9.4 Whatever the scale of development at Waterloo, what is certain is that the access capacity provided by the JLE has not in itself been the prime cause.

Southwark

- 6.9.5 Following JLE authorisation there was a flurry of interest in residential development within the catchment. There is no evidence, however, that this was due to the JLE. The area was an up-coming location at this time due to a range of other attractions, including the Tate Modern.

- 6.9.6 Of more interest perhaps is the revival of interest in the area close to Southwark station for office use. Expectations that two major office buildings nearby would be converted for residential or mixed use were not met. Instead, one building has been redeveloped (case study SW1) and the other refurbished to provide better quality office accommodation (case study SW2).
- 6.9.7 Although it is difficult to separate out the accessibility impact of the JLE in an area so close to central London attractions (including Waterloo), the JLE does seem to have had at least a supporting role in the regeneration of key sites nearby (case studies SW3-7).

London Bridge

- 6.9.8 As with Waterloo and Southwark, London Bridge is subject to the policy framework provided by the London South Central Study. This includes the promotion of high intensity development appropriate to the central area. In the case of London Bridge, however, such a shift was already apparent prior to JLE authorisation, with the development of major new office buildings near the station, and the regeneration of Hays Wharf.
- 6.9.9 As with Waterloo, London Bridge displays the ratchet effect of new development leading to the demand for more transport, which then in turn produces more demand for development. The “More London” development area incorporating the new GLA headquarters benefits from walking access to the city and public transport access at London Bridge, but it is impossible to distinguish the specific role of the JLE (case study LB2).
- 6.9.10 The station itself is now the subject of major plans for its rebuilding. The extra passenger movements which the JLE has brought are only one of a number of factors behind these proposals, but the total accessibility mix will no doubt form a strong part of the argument in favour of a new station and new property development to help pay for it.
- 6.9.11 The development case studies (LB 1-7) revealed no evidence that the JLE was a significant factor in the nature of timing of any schemes. The LDMS analysis showed significant increases in development activity after JLE authorisation, but this is thought to reflect the upturn in the commercial property market following 1993, and the new-found popularity of areas like Bermondsey High Street as a residential location. The JLE no doubt played a part, but how big a part cannot be determined.

Bermondsey

- 6.9.12 Bermondsey is a single line station falling outside central London, and as such its catchment is most likely to attract residential rather than other uses. The LDMS analysis revealed that although other catchments

showed higher levels of residential development in the post JLE period, Bermondsey was seen to have a more prominent position in the analysis when areas more than 400 metres distant were excluded from the catchment.

- 6.9.13 The case study phase of the research revealed further major schemes in the pipeline for intensification of residential development near Bermondsey station, but these had not been translated into planning applications at the time of writing.
- 6.9.14 Given the absence of other major public transport facilities in the area, and the step change increase in accessibility brought about by the JLE, it is reasonable to conclude that the JLE has had a significant and positive impact on residential development in the area. However, this impact is not fully reflected in the case studies within the Bermondsey catchment (case studies BE 1-5).

Canada Water

- 6.9.15 A problem with the Canada Water catchment is that it was drawn very wide to include the whole of the Surrey Docks peninsular, parts of which are more than a 20 minute walk from the station. The flurry of residential development in the catchment during the mid 1990s consisted in the main of luxury apartments exploiting riverside views (case studies CW3 and 5). Residential development exploiting proximity to the JLE station also occurred, and its timing was more closely related to the opening of the JLE rather than JLE authorisation (case study CW4). This is an indication of JLE impact.
- 6.9.16 The striking aspect of Canada Water, however, is the weak association between recent developments and the station (case study CW2). Although the LDDC had earmarked the area for commercial development, the layout and design of the schemes that emerged had the character of out-of-town suburban development. Although a passing nod to the JLE station was made in the form of a pedestrian “spine” route linking with the station, the fact remains that the nearest building is 300 metres from the station. In fact when emerging from the station one appears to be in the middle of a wasteland. This is the application of public transport oriented development principles at their weakest.
- 6.9.17 Neither developers of the existing non-residential schemes, nor the LDDC apparently had any interest in reducing car parking provision, or orientating buildings on their sites to maximise convenience of access on foot. Southwark Council made references on these points but appeared unable or unwilling to secure major changes.
- 6.9.18 The presence of the JLE is, however, causing a re-think of the area, by both public and private sector interests. Applications have been received for major intensification of retail and commercial sites developed as

single story retail “sheds” only a few years previously (case study CW2). Meanwhile the Borough Council (following the transfer of planning powers from the LDDC) is aiming to promote Canada Water as a major new district centre with much more intensive and diverse activity.

6.9.19 There is therefore evidence that the JLE will in the longer run prove to be a significant catalyst for “second generation regeneration” of the area. This could be further enhanced when the proposed extensions to and upgrading of the East London Line occur. There is certainly plenty of opportunity for the intensification of development around the station. So far, however, the availability of land and JLE accessibility has not proved sufficient to attract a comprehensive scheme.

Canary Wharf

6.9.20 As found in other parts of the corridor, there was a significant surge in residential development activity in the mid 1990s. It is reasonable to surmise that this was a response to JLE authorisation, but this cannot be established for certain. The decline in such activity after 1998 was apparently due to the take up and consequent exhaustion of suitable sites.

6.9.21 The main story at Canary Wharf has little to do with residential development, however. Canary Wharf is all about commercial, and especially office floorspace. High quality and reasonably priced offices in an accessible and well-serviced location is the vision that has driven the development of Canary Wharf. It is promoted as an alternative business location to the City of London (though the scale of it is tiny by comparison).

6.9.22 In relation to the impact of the JLE, the question can be turned on its head with equal confidence. Canary Wharf was to all intents and purposes the pro-genitor of the JLE. It provided sufficient commitment and guarantees of passenger demand, and a certain amount of money, to cause politicians of the day to choose to build JLE rather than other rail projects which demonstrated a superior cost-benefit ratio.

6.9.23 Looking at the argument the other way round also works well. The JLE has led to the development of Canary Wharf being on a much grander scale than before. Without that level of accessibility, and without the direct connection to the Underground network, Canary Wharf would have struggled to grow beyond the level provided for in the original plans. This is indicated in the table below.

Table 7.4 Capacity of Canary Wharf with different levels of rail access*

Rail access	Employment floorspace capacity	Approximate employment
-------------	--------------------------------	------------------------

		equivalent
Without JLE	6-7 m sq ft	25-28,000
With present JLE	18-19 m sq ft	75-77,000
With JLE operating to full track capacity	22 m sq ft	89,000
With Crossrail	35 m sq ft	140,000

** Assumes a public transport mode share for the journey to work in the order of 80-90%. The data relate to the sites of Canary Wharf Group Plc. Further employment capacity is available on other sites on the Isle of Dogs.*

6.9.24 Moreover, there are other major development opportunities that have followed on from the JLE. The most prominent is the so-called “Millennium Quarter”, a 20 hectare area for which a masterplan was prepared in 2001 for the purpose of steering the “second generation regeneration”. When the Isle of Dogs Enterprise Zone was established in the early 1980s, the attraction of one and two storey commercial premises (some resplendent in the latest post-modern designs) was hailed as a great success. Now these early buildings will be swept aside as new office towers march southwards from the omnipresent Canary Wharf (case study CF1).

6.9.25 In addition there are other major sites still available close to the JLE station, of which the largest is the area including Wood Wharf (case study CF7). It is easy to predict that at some stage this will be comprehensively developed at very high density, but at the time of the research the landowners’ aspirations had not materialised in the shape of a planning application or masterplan.

6.9.26 Canary Wharf is the main focus of attention in terms of unravelling the development impact of the JLE. This can be argued since:

- Canary Wharf would not have developed to its present, and certainly not its planned, extent had the JLE not served the area;
- Other station catchment areas were either already well served by public transport (Westminster, Waterloo, London Bridge, Stratford); or have yet to reveal their power to attract major long-term investment (Canada Water, North Greenwich, Canning Town and West Ham); or are already intensively developed, with few if any large vacant sites available (Southwark and Bermondsey).

6.9.27 Whatever broader development impact the JLE had, the clear conclusion is that it enabled the development of a major commercial centre, and that this could not have occurred in a similar manner without the JLE. This applies not only to the extent of commercial floorspace provided, but

also the delivery of a mode split for the journey to work with a public transport share comparable to central London (i.e. in excess of 80%).

- 6.9.28 The planning policy as pursued by the LDDC was clearly dovetailed with the Canary Wharf development scenario. Since the transfer of planning powers to the boroughs, Tower Hamlets has continued the policy of encouraging further significant growth at and around Canary Wharf. Some aspects of policy have changed, for example regarding employment, training, and affordable housing. These are not confined to the Canary Wharf catchment, but there is a wish at borough level to try to ensure that such commercial development areas distribute social and economic benefits more widely than was the case with the early phases.
- 6.9.29 Overall, in order to conclude whether the JLE has had an impact on development one need look no further than Canary Wharf. It may not in the long run prove to be the most significant impact, but for the present it is the most readily identifiable impact.

North Greenwich

- 6.9.30 Apart from Canary Wharf, the development impact of the JLE is most starkly apparent at North Greenwich. The Millennium Dome, one of the most prominent structures in London, would not have been located at north Greenwich had the JLE not been built, or if it had not served the peninsular. Without the combination of the necessary land and the JLE it is arguable that the Millennium exhibition would have been located in Birmingham rather than London. The JLE was able to provide access for the Dome without heavy reliance on road transport.
- 6.9.31 The Dome and the Millennium Experience was a controversial project, challenged in terms of its cost, content and concept. But it was nevertheless a major project with a significant impact on the peninsular. The following points reinforce this:
- Site preparation included decontamination which would have been required before any alternative redevelopment;
 - The cost of the Dome is put at around £750m, including £185m for the land decontamination, and excluding the costs of post-closure maintenance;
 - Employment generated by the Dome and the Millennium Village has been estimated at 7,000 jobs including construction, though of course many of these will no longer be there;
 - The Dome attracted 6.5 million visitors during 2000, making it the most-visited paying attraction in the UK.

- 6.9.32 While it is clear that the Dome would not have gone ahead without the JLE, a further question is whether redevelopment of the Greenwich peninsular would have gone ahead any more quickly without the Dome. On the one hand the Dome was the catalyst for site preparation, transport infrastructure (the bus-rail interchange, the committed guided busway to Charlton, local access roads) and landscaping of formerly derelict areas. It might have been difficult to generate the impetus for these major works without the kick-start provided by the Dome project.
- 6.9.33 On the other hand it can be argued that the Dome project has delayed redevelopment on the peninsular in a number of ways:
- The Dome has occupied a third of the total redevelopment area since 1998;
 - Its continued presence (required by the Government and supported by the borough council) limits other options for redevelopment of the site;
 - The form and use of other redevelopment sites on the peninsular will remain uncertain until the future use of the Dome (or its site) is finalised;
 - Responsibility for deciding the future of the Dome rests with the Government, which means effectively that the borough council is unable to proceed with implementation of the development framework. The draft framework says that “The Council will require the retention of the Dome”, yet the Council has no power to require this.
- 6.9.34 Shortly before this report was prepared, the Government announced that it was to transfer the Dome and land around it to a private consortium in return for a share of future profits.
- 6.9.35 Furthermore, a new road link between the Dome and Silvertown is being considered to boost the regeneration prospects of the peninsular. This suggests that the JLE by itself is insufficient to attract significant development, at least in the eyes of potential developers. The problem may be magnified by the fact that the JLE is reaching its comfortable capacity at peak hours, and that this may dampen enthusiasm for development at North Greenwich which generates more peak hour demand. The proposed leisure use of the Dome would appear to be appropriate in the light of this, since leisure travel is mostly off-peak.
- 6.9.36 Overall, while it is clear that the JLE produced a very clear impact in the shape of the Millennium Dome, it is unclear whether this impact can be judged as a positive one, compared to the opportunity cost of developing that part of the north Greenwich peninsular in other ways.

6.9.37 The other parts of North Greenwich peninsular should not be ignored. In the policy section of this report it is concluded that although retail and leisure development has occurred since JLE authorisation, this lies at the south end of the peninsular, is strongly oriented toward car access, and has little relationship to the JLE. The residential development at the Millennium Village may be more significant in terms of the JLE, but this too lies a good distance from the station and is therefore difficult to attribute to it.

Canning Town

6.9.38 As with Canada Water, the catchment defined for Canning Town extends beyond the area that can reasonably served on foot. The LDMS analysis revealed an increase in residential development activity following JLE authorisation, as in other JLE catchments. The majority of this activity, however, was at a considerable distance from the JLE station, and in accessibility terms is more likely to be related to the DLR (case study CT4). Similarly major non-residential development, such as the Excel exhibition centre, is also remote from the JLE station, and is well provided with car parking spaces (see also case study CT1).

6.9.39 If the more immediate area around the station is considered, so far the JLE has had little development impact. In the longer term, the Borough of Newham wish to promote major intensification of activity around Canning Town and West Ham stations as part of the regeneration of the Lower Lea Valley, for which an award winning planning framework has been prepared. This is an instance where a final judgement on the impact of the JLE is a matter for future research.

6.9.40 At the time of writing, however, there appeared to be a continuing gap between the aspirations of the Borough, and the readiness of private sector development interests to deliver them.

6.9.41 It can nevertheless be concluded that the JLE has had a significant impact, not on development demand as yet, but on local regeneration strategies and aspirations.

West Ham

6.9.42 At West Ham a similar story can be told to that at Canning Town. There is little evidence that development interests are crowding in to exploit the accessibility benefits of the JLE. In the longer term this could happen, and the Borough is taking a much more pro-active stance to ensure that it will. But in the meantime much of the potential development land is poorly connected to the road network and existing services and areas, and there is no “critical mass” of development that

might serve to minimise the risk for early development (case studies WH 2 and 3).

- 6.9.43 The JLE may therefore be regarded as an enabling device that supports, or has even led to, future regeneration plans for higher intensity mixed use development, rather than being the principal catalyst for such change.

Stratford

- 6.9.44 Stratford has seen probably the most intense development interest east of Canary Wharf, but this is difficult to associate directly with the JLE because Stratford was already relatively well served by public transport, and also had the prospect of a station with international services. The JLE has, however, provided a major increase in capacity to Canary Wharf and the West End, and provided a direct link to London Bridge and Waterloo. In addition, the JLE played a key role in the decision to build an international station at Stratford. While the role of the JLE in stimulating development interest at Stratford cannot reasonably be disputed, it is difficult to ascribe any specific portion of this effect to the JLE. At Stratford, as at Waterloo and London Bridge, the JLE has become part of a range of public transport services that must be regarded together as providing locations of extremely high accessibility.

6.10 ***Overall geographical analysis***

- 6.10.1 Examination of the maps of residential development reveals that there is little if any support for the hypothesis that development intensity will be higher in the locations closest to the stations. Why should this be? The following are offered as possible explanations:

- Development has occurred primarily where sites have been available, which as it happens have often been at some distance from the stations. This might be the explanation at Canning Town, for example (case study WH1);
- The sites close to stations are often occupied by or sought after for commercial or non-residential development. This is a relevant factor for example at London Bridge (case study LB2), Canary Wharf (case studies CF 1 and 7) and Stratford.
- Attractions other than the JLE have proved to be more marketable. The take of riverside sites, for example, appears to explain the situation in Southwark and the Isle of Dogs (case studies CW3, CF 5 and CF6).

Inter-catchment competition

- 6.10.2 In terms of commercial development away from central London, Canary Wharf holds all the winning cards. Yet there are plans and aspirations for non-residential development at other JLE locations, in particular for new district centres at Canada Water, North Greenwich, and Canning Town. It is unlikely that such plans would have been under discussion without the JLE, and this in itself is a JLE impact, but plans and realisation are very different, and it remains to be seen whether the plans will materialise.
- 6.10.3 First, there are limits to the JLE's capacity to handle the extra passengers that may be implied. Second the considerable headstart achieved at Canary Wharf may limit the ability of other locations to compete. Third, if Crossrail is built to Canary Wharf, this will further increase its relative advantage. Fourth, without effective delivery mechanisms (such as the unified land ownership and top level political support available to developers at Canary Wharf and to an extent at North Greenwich) how likely is it that comprehensive regeneration plans can be implemented? On the latter point, the Boroughs are relying on public private partnerships.

6.11 *Quality and type of regeneration*

- 6.11.1 In this analysis, it is worthwhile commenting on the nature of development changes that have occurred.
- 6.11.2 Could development, e.g. at Canary Wharf and the Millennium Dome, have occurred without the JLE. The answer is probably yes, but not as we know it. The high capacity public transport accessibility provided by the JLE has enabled a style of development that relies to a relatively small degree on the private car for access.
- 6.11.3 Between the public transport dependent City and West End, and the car-dependent outer London suburbs, there are inevitably areas where new development could go either way; where the suburban ethic and the central city ethic clash with one another and compete for dominance. In the policy section in relation to Newham, it is postulated that one impact of the JLE is to in effect ensure that the boundary between centre and suburbs will shift to the east. In other words, the areas of London that make lower demands in terms of car access will be increased.
- 6.11.4 The evidence from the catchments where there is the most potential for regeneration (Canada Water eastwards) shows that growing the local economy in a way that contributes to existing communities and responds to local needs is likely to be a good deal harder than the type of regeneration achieved at Canary Wharf. In effect the investment at Canary Wharf was "parachuted in" and almost deliberately set out to create an environment that was separate from, and not perceived to be

affected by the rest of the Isle of Dogs. Despite the odds, the Boroughs expressed a keen desire “not to do another Canary Wharf”, and are developing regeneration strategies that are much broader in their vision, and much more in tune with local needs. If the JLE helps them to deliver this, then it will be an impact of major importance.

6.12 *What if the JLE had not been built?*

6.12.1 It is clearly not possible to say with any certainty what might have happened if the JLE had not been built, but it is still useful to consider the question.

The table below attempts to summarise the outcomes that might have been expected had the JLE not been built. This is based on the researcher’s judgement taking into account all the different strands of evidence.

Table 7.5 Differences in outcomes without JLE

Catchment	Outcome if JLE not built
Westminster	No difference
Waterloo	Possibly more limited development aspirations
Southwark	Possibly less emphasis on office development
London Bridge	Possibly more limited development aspirations
Bermondsey	Lower intensity residential and mixed use than now in the pipeline
Canada Water	Continued “suburban” low-density commercial use, and housing especially on river frontage
Canary Wharf	Limitation of Canary Wharf schemes and less interest in redevelopment of nearby sites to achieve greater densities
North Greenwich	No Millennium Dome. Regeneration with other uses could have been speedier, based on British Gas masterplan. But could also have been slower because of decontamination and infrastructure funding gap
Canning Town	No difference in the short term. Reduced regeneration ambitions in longer term. Absence of developer interest in high density residential on nearby sites
West Ham	No difference in the short term. Reduced regeneration ambitions in longer term
Stratford	Possibly slower take up of regeneration schemes

6.12.2 Three particular questions were raised during the study process, including the interviews with borough officers and property owners.

- Without the JLE, would development have been lost to the corridor served by the JLE?

The analysis supports the conclusion that some development in the JLE corridor would either not have occurred, or would have located elsewhere. In particular, much of the development at Canary Wharf and planned for adjacent areas could not have been accommodated without the level of access provided by the JLE. Also, the Millennium Dome would not have been built at North Greenwich without the JLE, although other developments might have occurred by now.

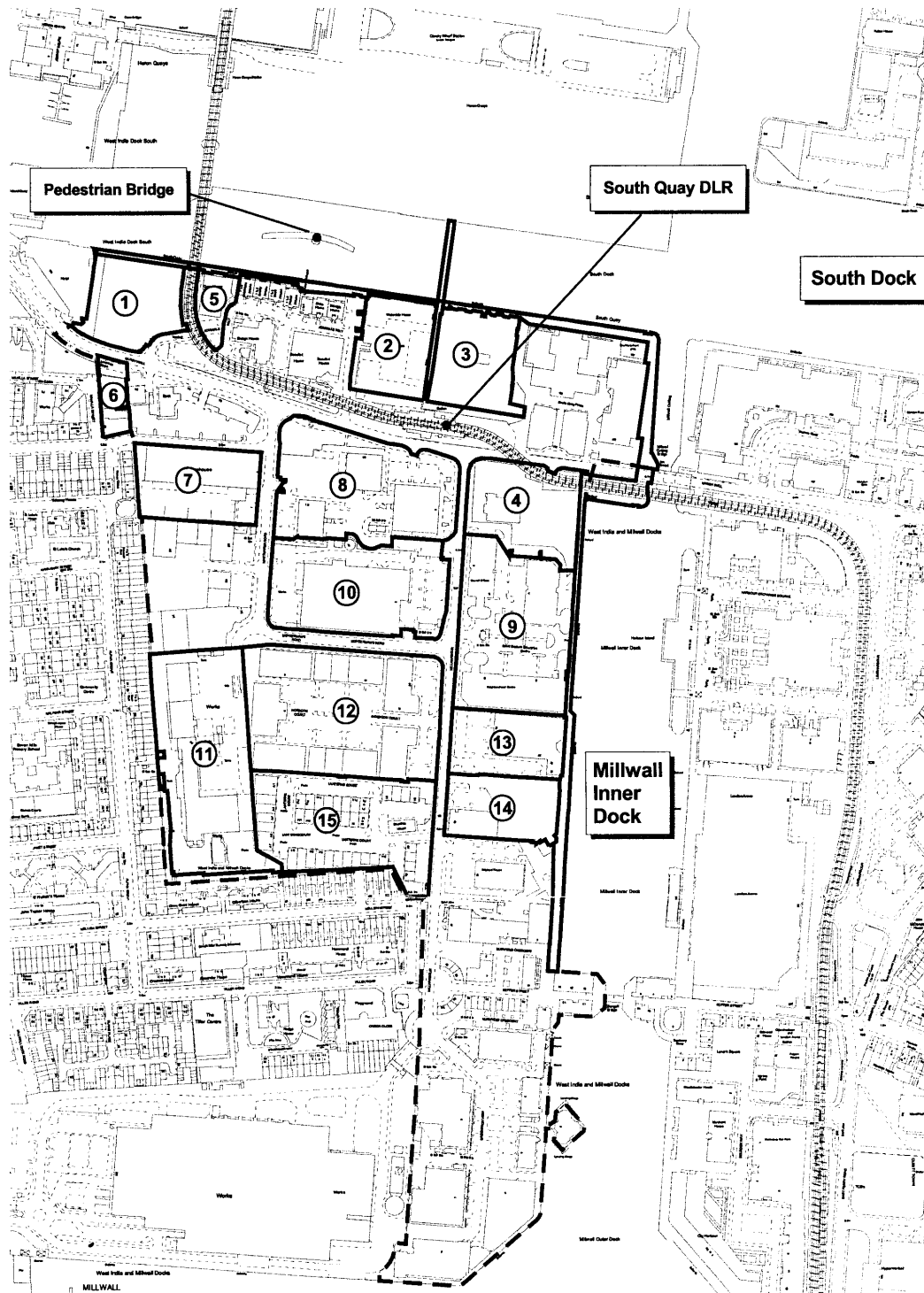
- Without the JLE, would development have been lost to London (i.e. would development instead have migrated to other cities or other countries)?

The argument was proffered that without the major office capacity provided at Canary Wharf, London would have been in danger of losing its premier financial centre status to Frankfurt or other competing cities. While Canary Wharf has provided a focus for some high profile office developments, and relocations of offices from the City of London, it cannot be said with certainty that without this London's position or competitiveness would have been undermined. There are other highly accessible sites that could have provided major office capacity, such as Kings Cross and Paddington basin. Moreover, employment at Canary Wharf is less than 15% of that provided in the City of London. This could, however, rise to almost 30% when the area is fully built.

- Without the JLE would aspirations for development in the corridor have been lower in terms of both the volume and style of development?

The analysis of borough planning policy revisions since the JLE authorisations suggests that aspirations for many parts of the JLE corridor have been raised considerably. For example, Canada Water is to become the access node for a new district centre, major redevelopments are proceeding on the Isle of Dogs, and there are plans for significantly higher intensity development at all the stations further east. This "raising of sights" in the JLE corridor can certainly be imputed to the JLE. Such uplifts in development intensity are most unlikely to have occurred without the JLE, or without some alternative high capacity rail route, being provided.

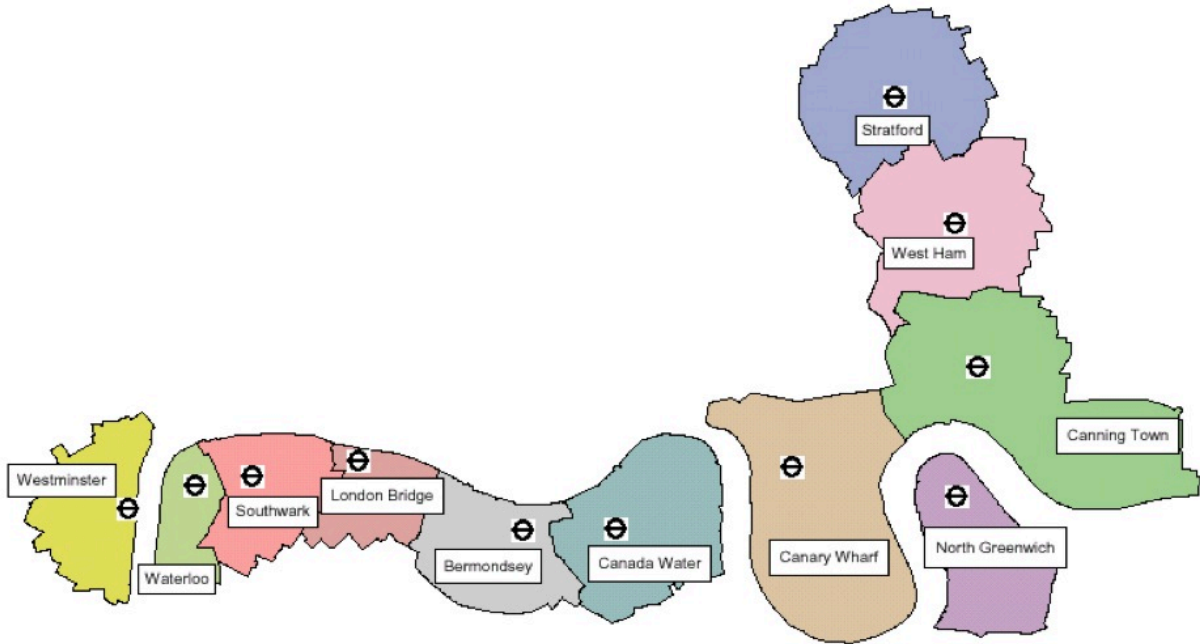
7 *Annex of Maps and Photos*



Millennium Quarter

- | | |
|---|---|
| 1. Arrowhead Quay (Ballymore) | 2. World Trade Centre 1,2,3 |
| 3. World Trade Centre 4,5 | 4. No. 1 Millharbour (Ballymore) |
| 5. Quay House | 6. 63-69 Manilla St |
| 7. No. 4 Mastmaker (Carnegie Holdings) | 8. World Trade Centre 6,7,8 |
| 9. No. 3 Millharbour (Thames Water/Ogden) | 10. No 2 Millharbour (Fidelity Investments) |
| 11. Tate & Lyle (Charlgrave Properties) | 12. Indecon Court (Ogden Group) |
| 13. 31-39 Millharbour | 14. 41-43 Millharbour (Weston Homes) |
| 15. Lantern's Court (Lansbury Development Ltd.) | |

Map of JLE catchment areas



Scale 1:60,000

Reference Areas

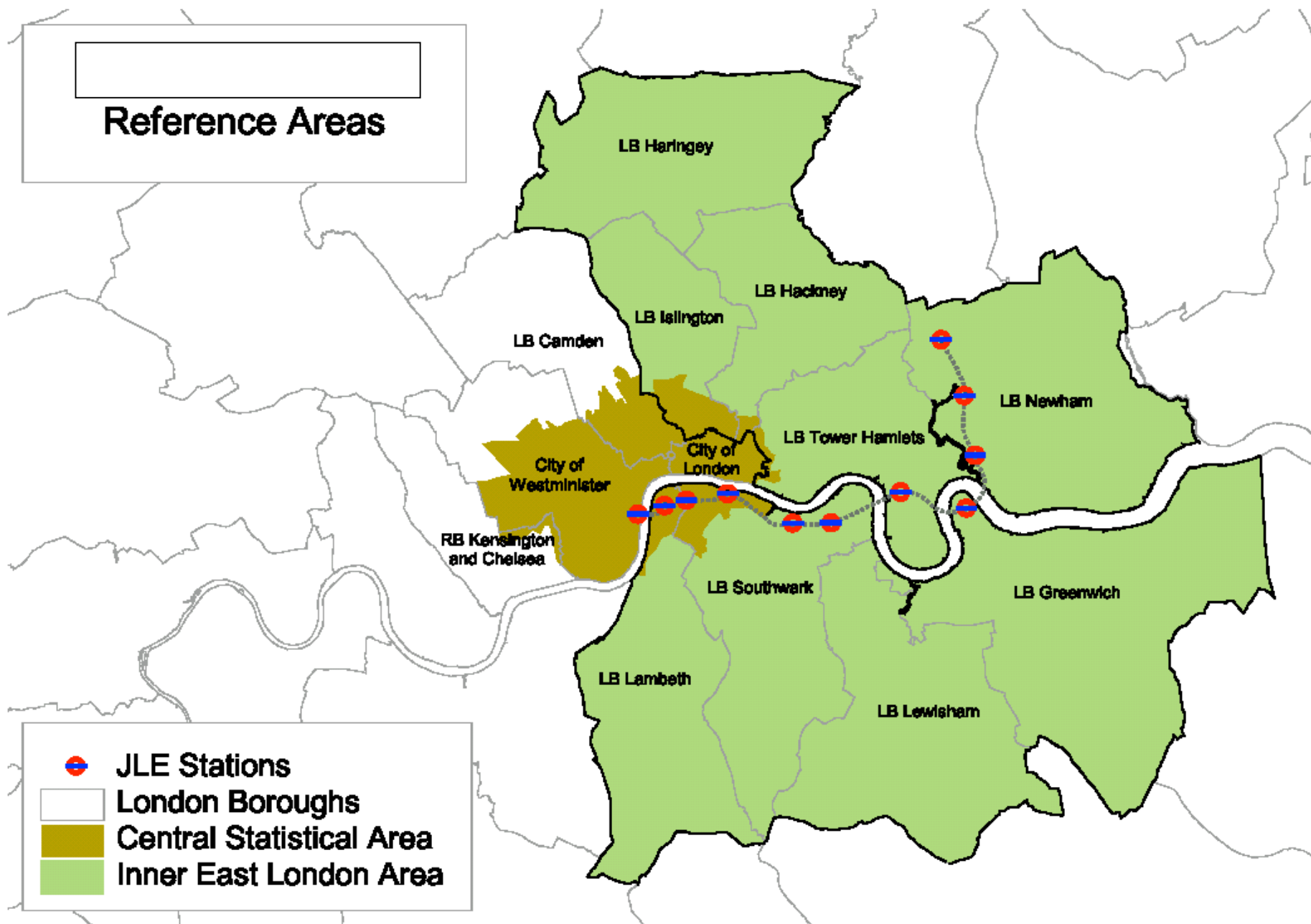
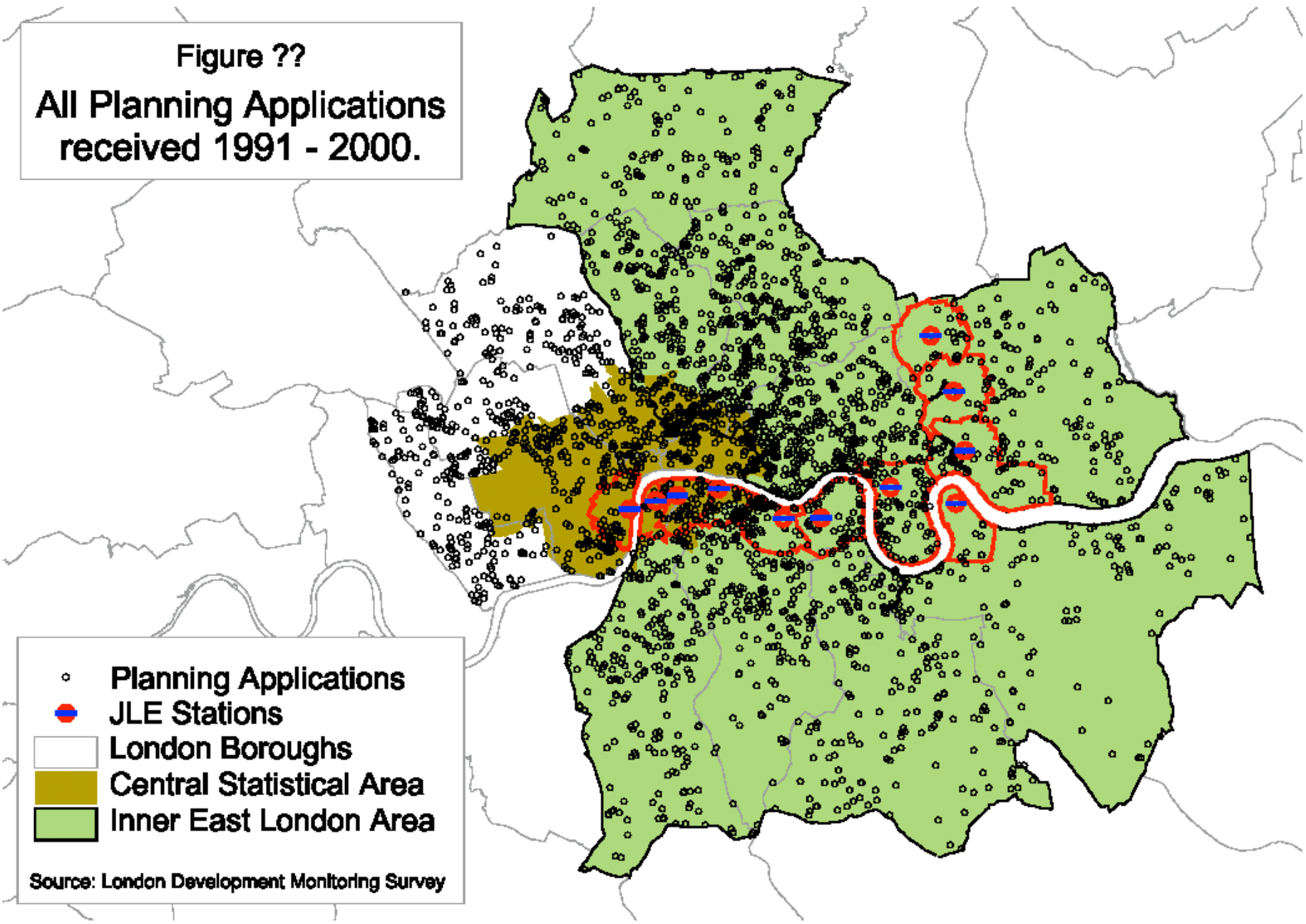


Figure ??
All Planning Applications
received 1991 - 2000.



Source: London Development Monitoring Survey

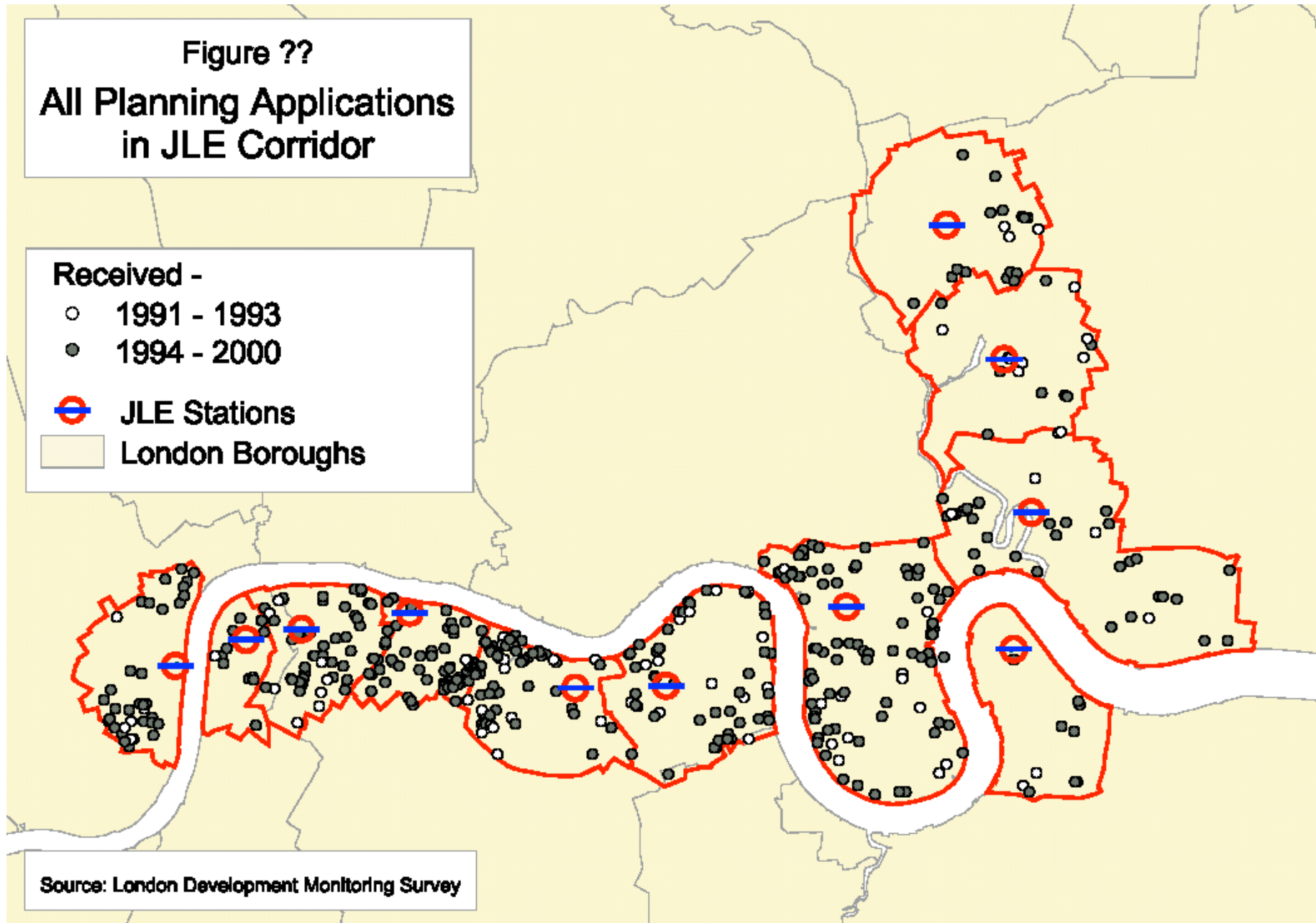
Figure ??
All Planning Applications
in JLE Corridor

Received -

- 1991 - 1993
- 1994 - 2000

⊖ JLE Stations

London Boroughs



Source: London Development Monitoring Survey

Figure ??
Residential Development in
Westminster & Waterloo.

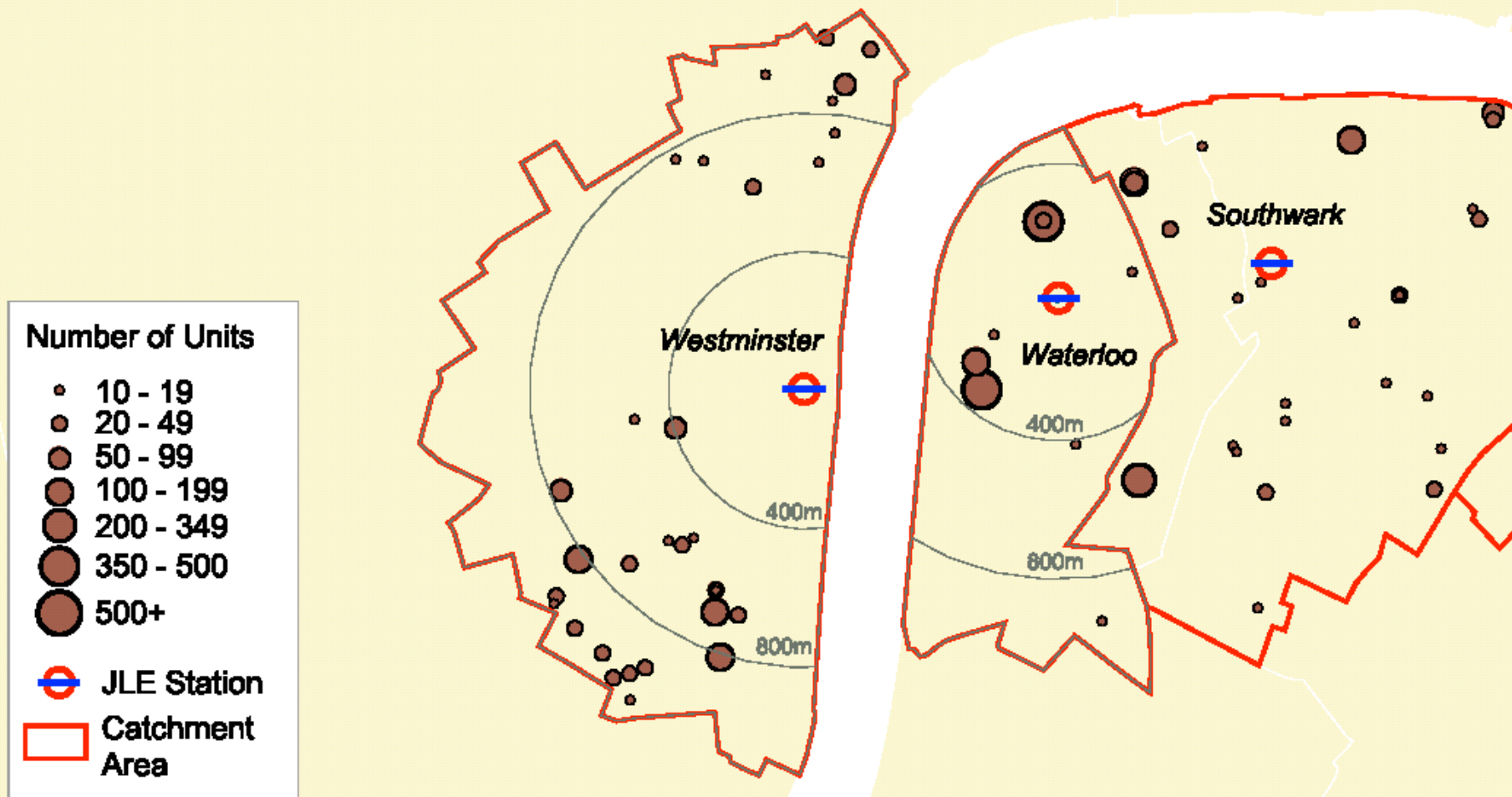


Figure ??
Residential Development in
Southwark & London Bridge.

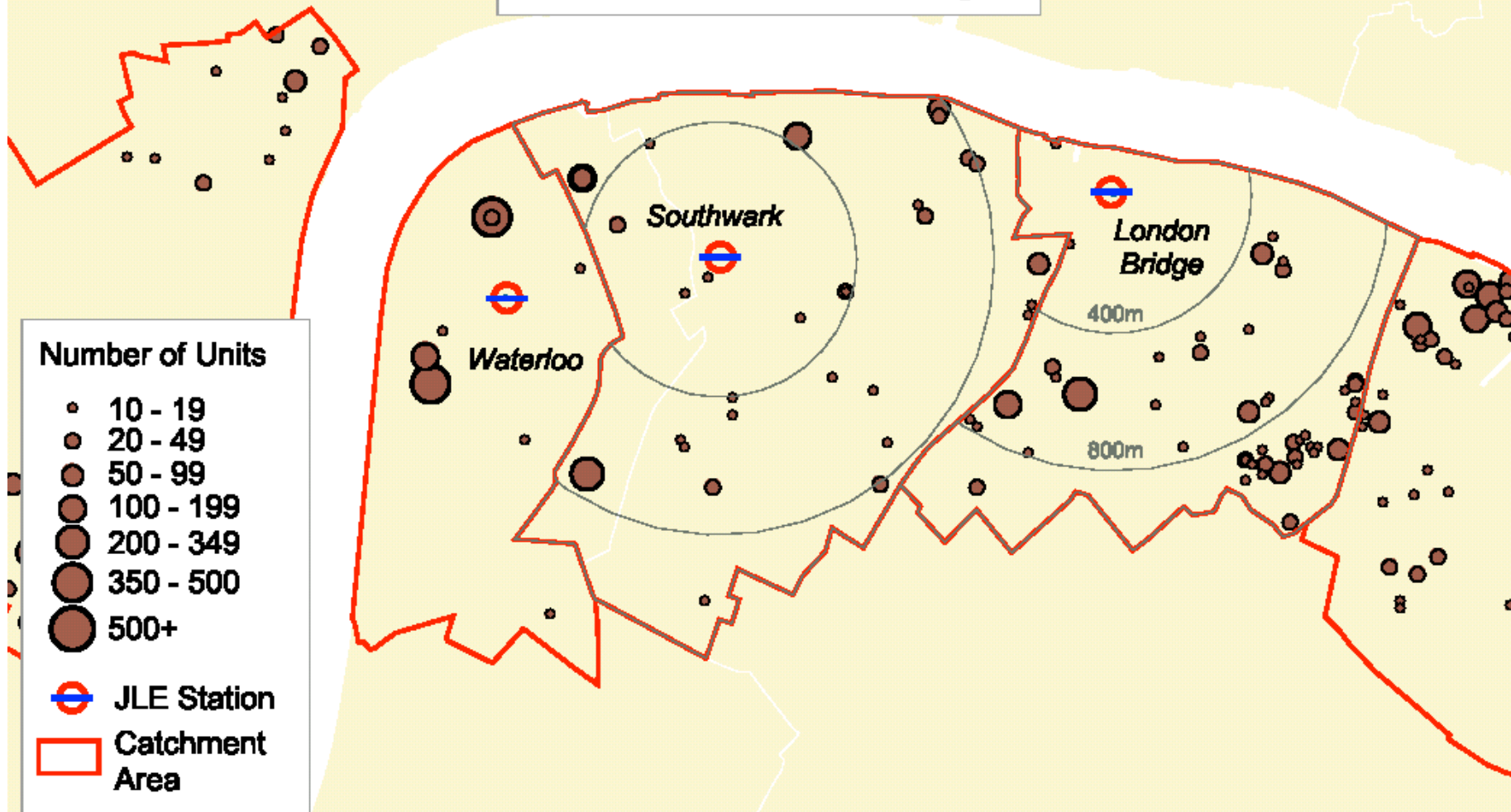


Figure ??
Residential Development in
Bermondsey & Canada Water.

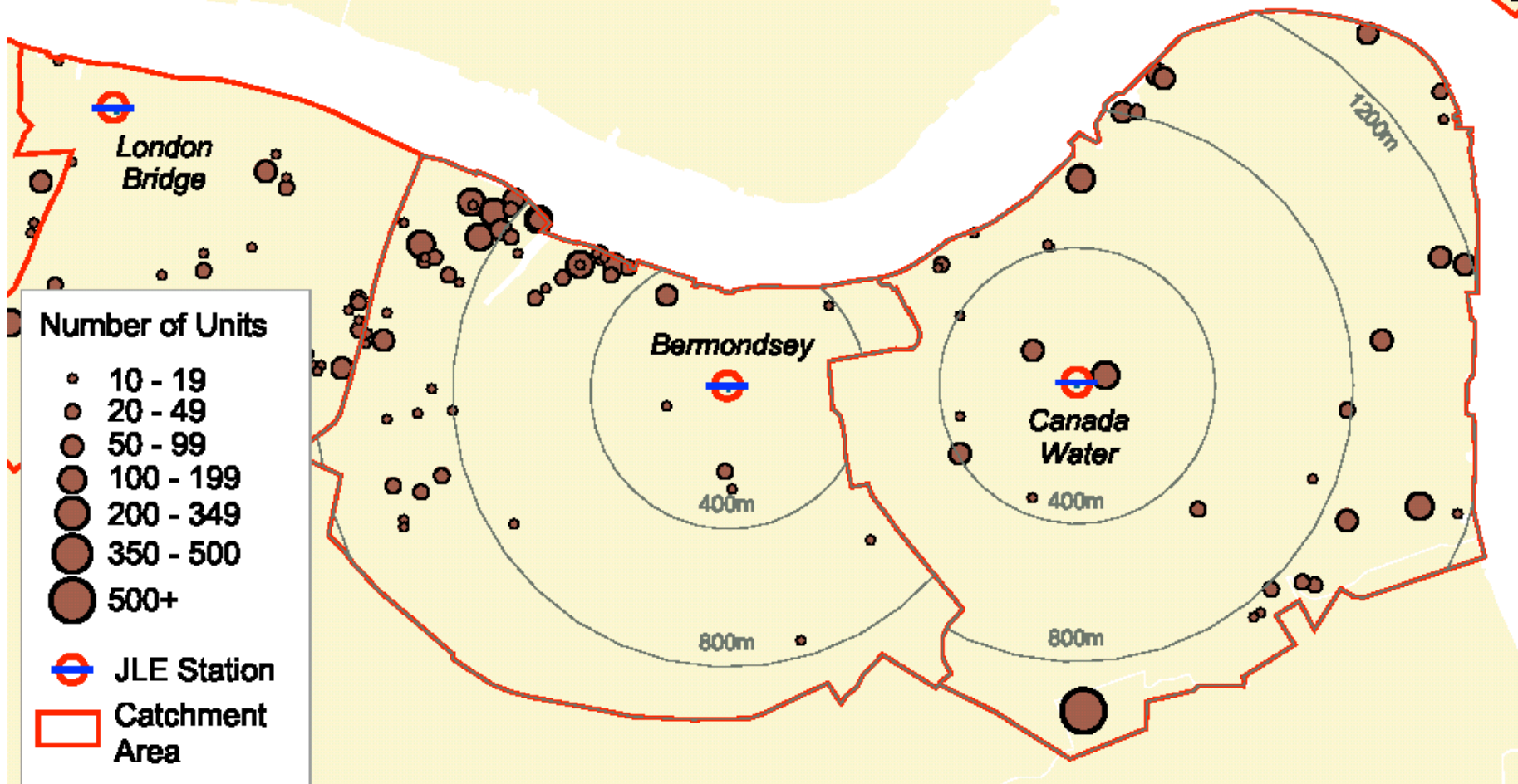


Figure ??
**Residential Development in
 Canary Wharf & North Greenwich.**

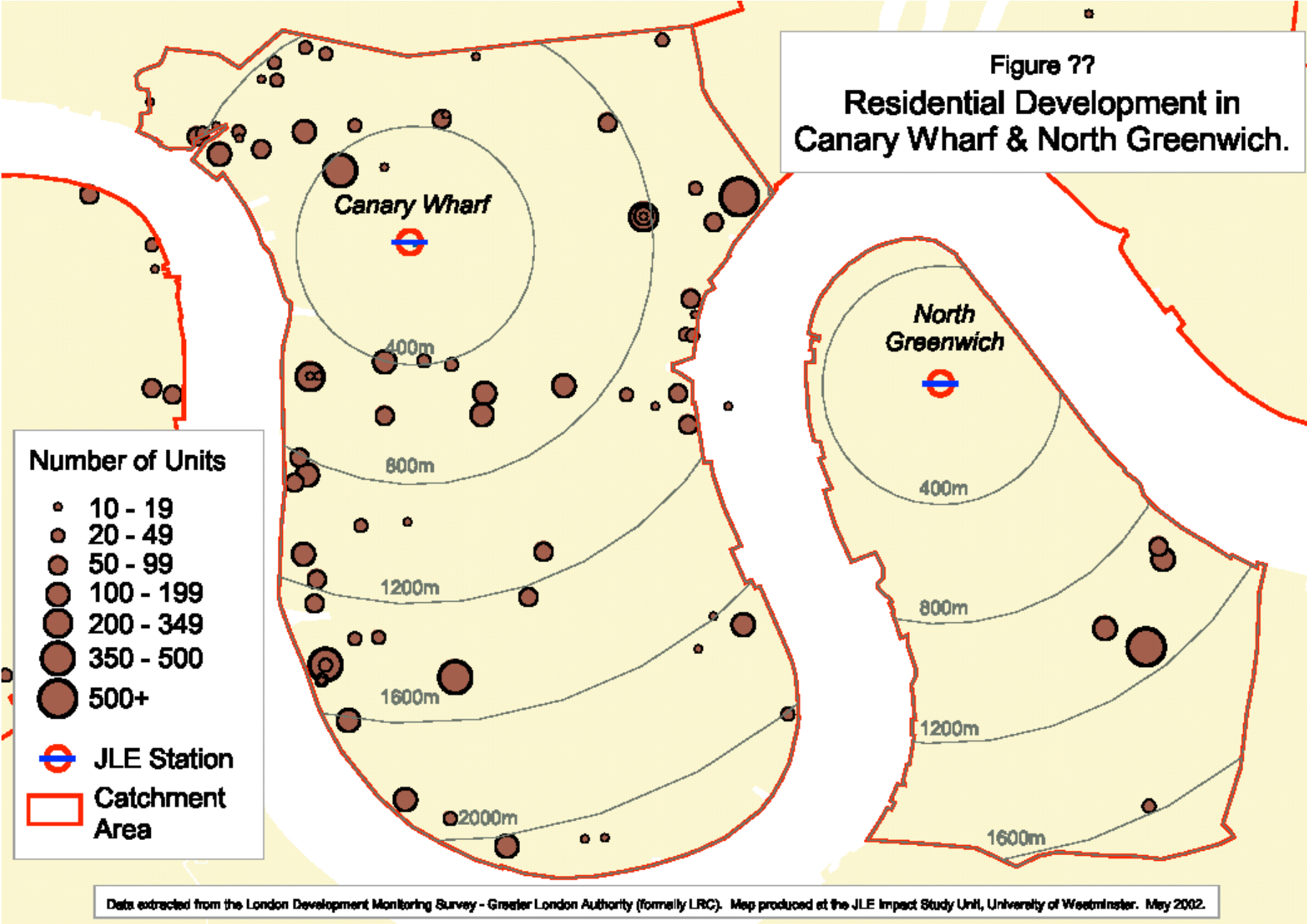
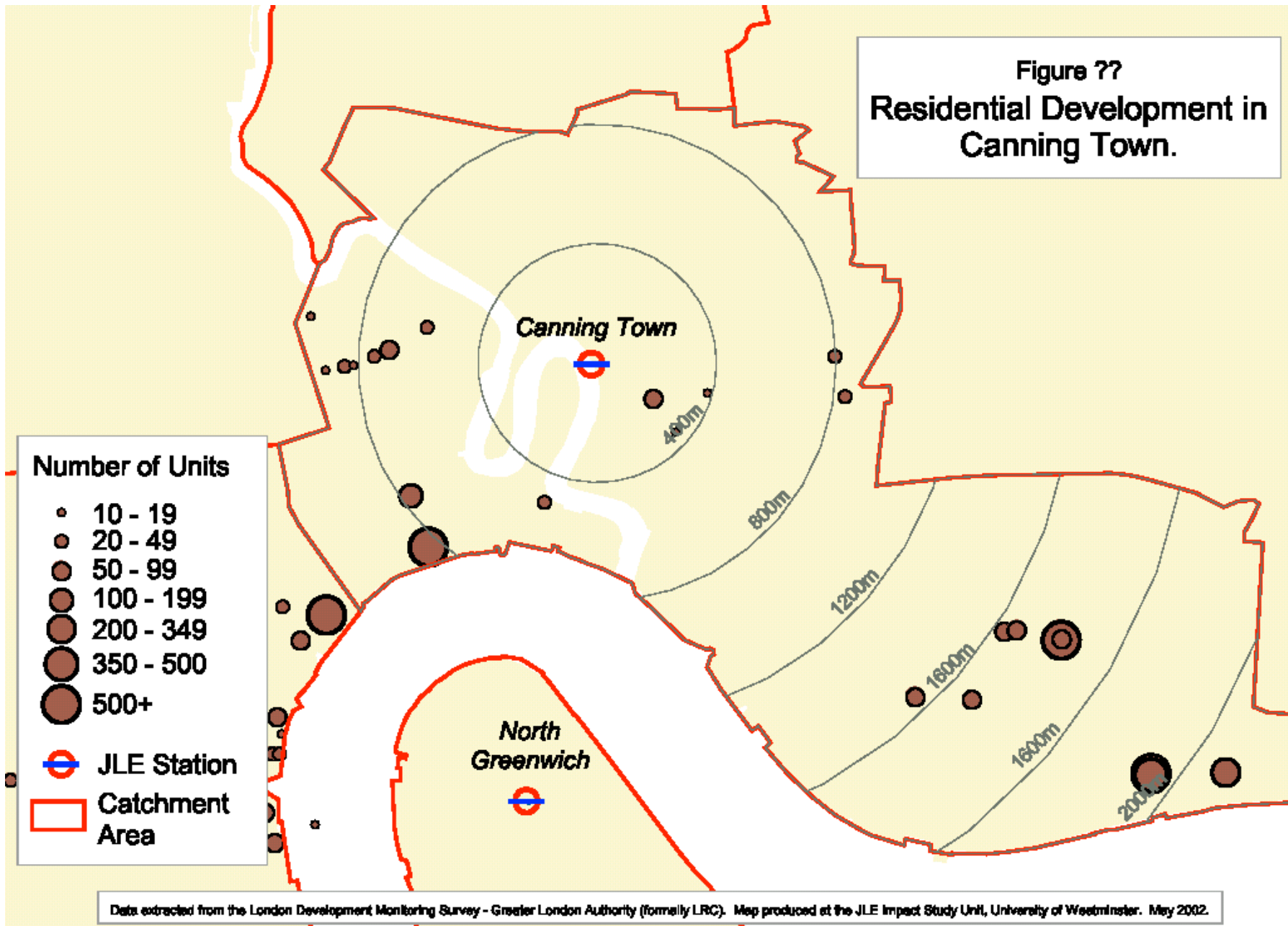
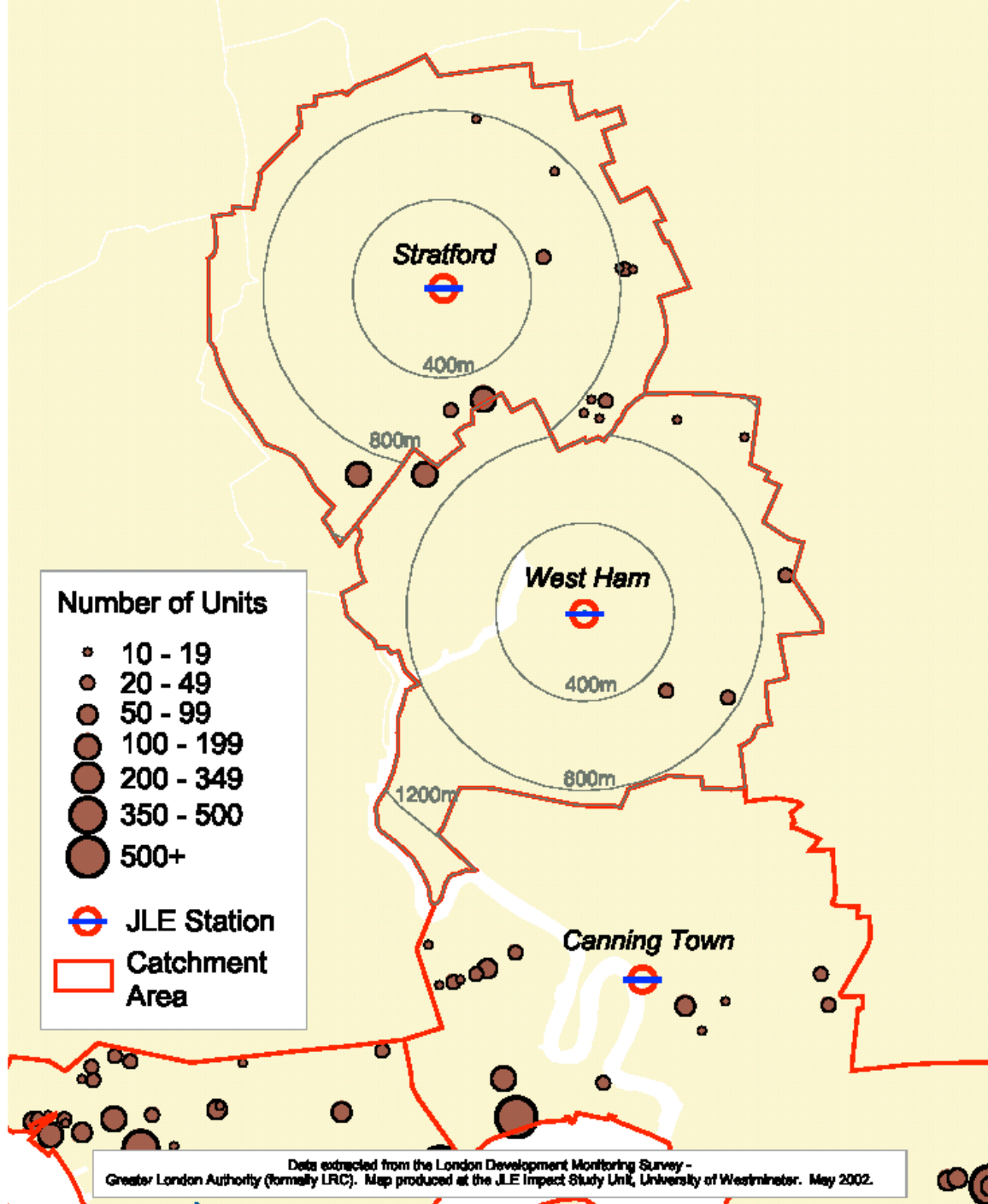


Figure ??
Residential Development in
Canning Town.

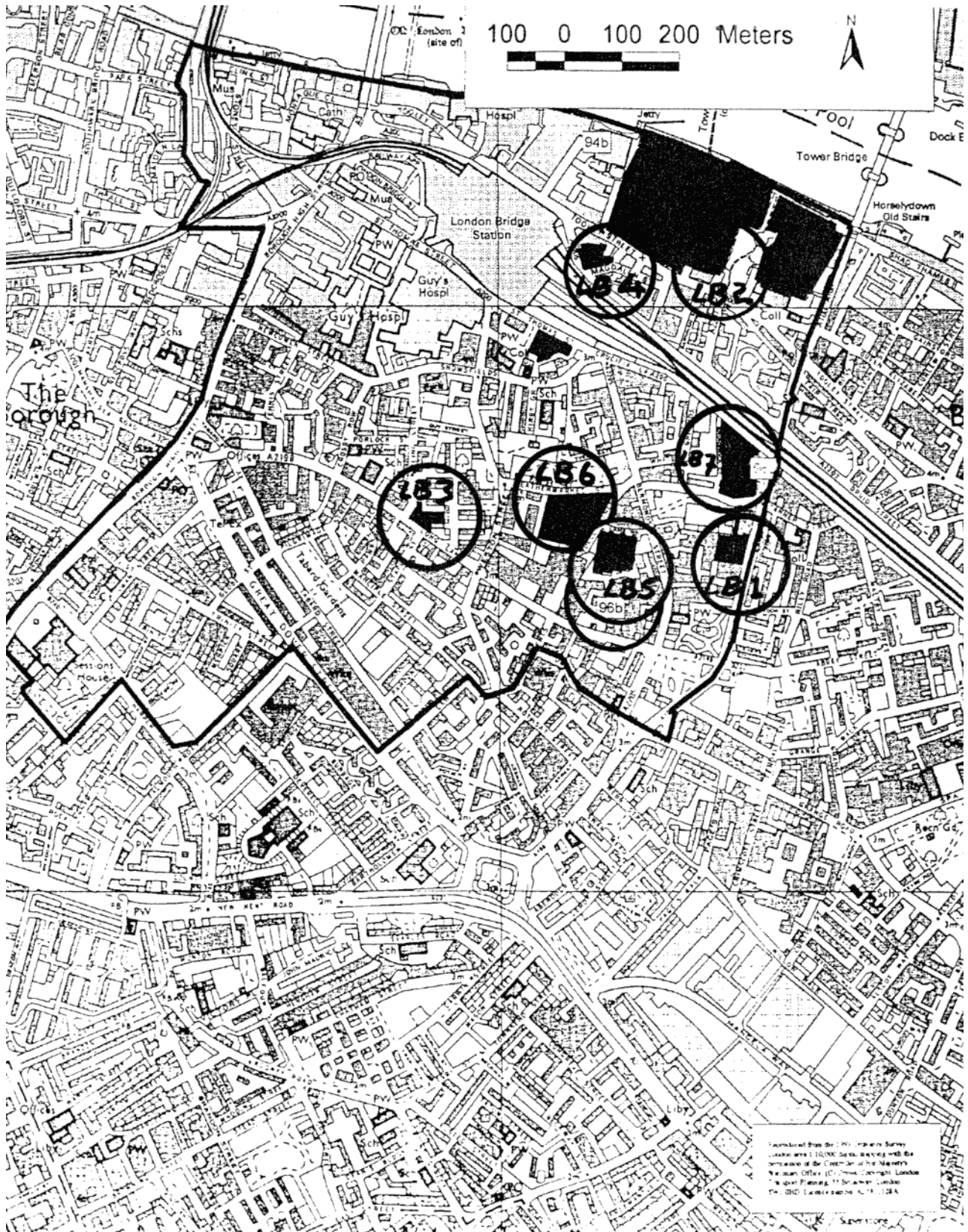


Residential Development in Stratford & West Ham.

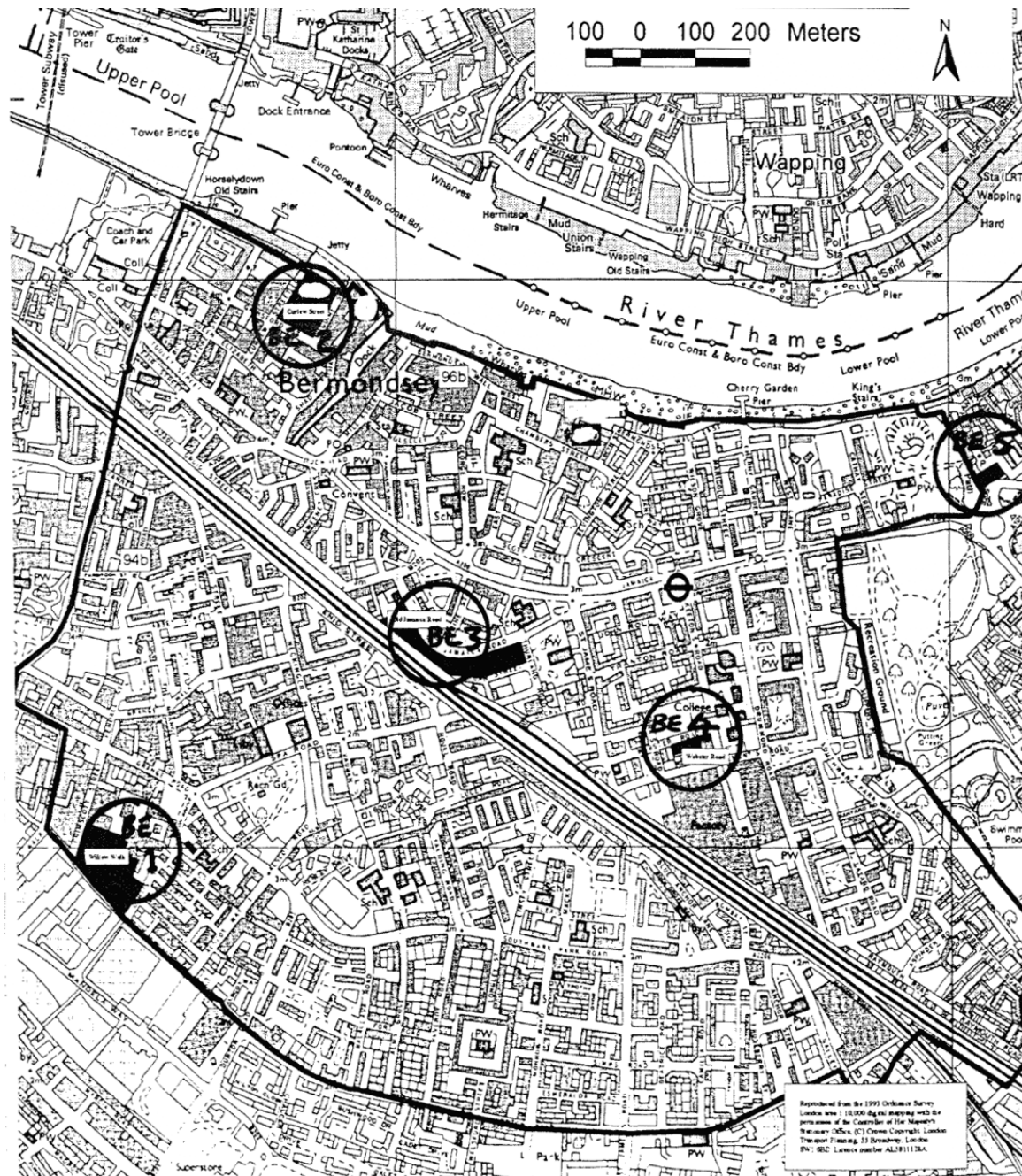


Southwark Station catchment showing case study locations

London Bridge catchment and case study locations



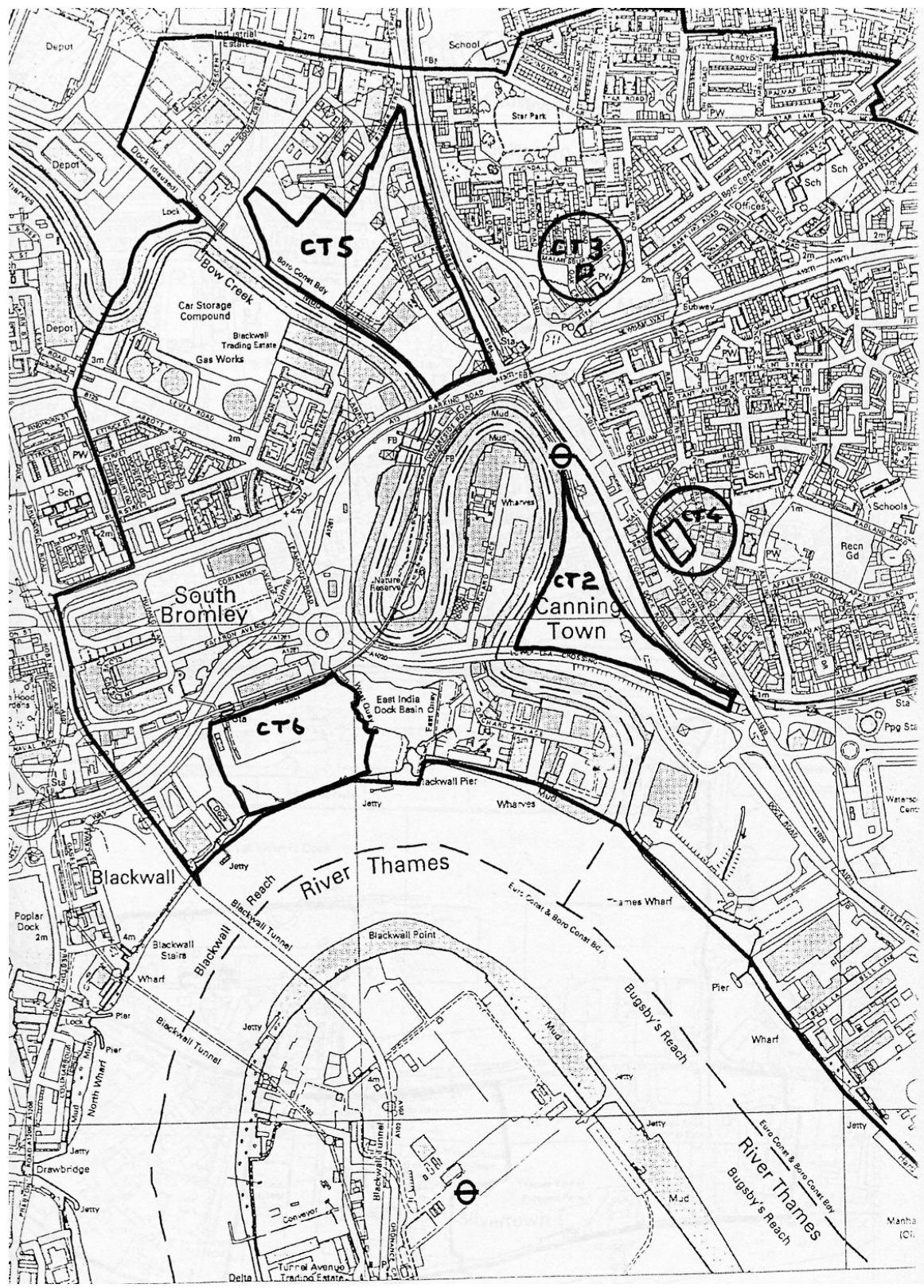
Bermondsey catchment and case study locations



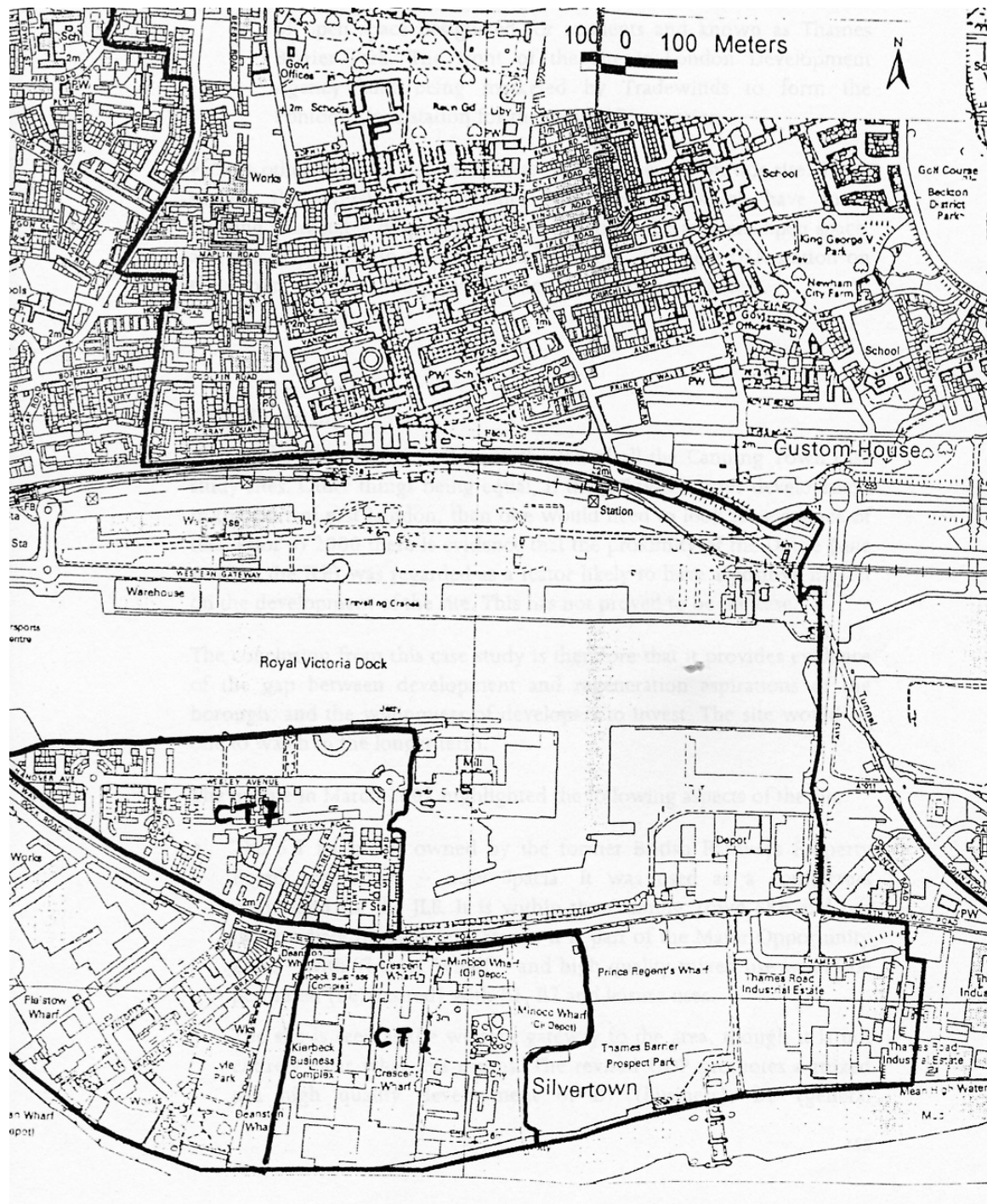
Canada Water catchment and case study locations



Canning Town catchment and case study locations (western part, with station)



Canning Town catchment and case study locations (eastern part)



West Ham catchment and case study locations



PHOTOS FROM THE JLE CORRIDOR



Vacant land adjacent to Canada Water station



Canada Water station – plenty of land for development



High density residential attracted to Canada Water



**Near to Canada Water station
Retail unit on right (site D) now with permission
for high density residential**



**Delta Wharf to the right of the Millennium Dome:
a major area for more intensive development**



**Millharbour – a large site within the Millennium Quarter
for high density mixed use, predominantly commercial**



**Millharbour – first generation low-rise offices
about to make way for marching towers**



**Rick Roberts Way development, West Ham.
New development but influenced by road access, not JLE**



**“Wrong side of the tracks!”
The Channelsea site at West Ham.
The station is at top left of the picture**



**Wood Wharf site (foreground, showing proximity
to existing Canary Wharf towers**



**Globe Wharf, a good 10 minute walk from
Canada Water JLE station**



**The new GLA rises above the rest of the “More London” major
commercial development area (case study LB2)**



Friars House new Southwark JLE station, now fully refurbished for office use again. The car park and the student residence to the rear are visible on the left



**Mixed use opportunity opposite Colombo House (left)
The site includes land under the railway arches and is within 50 metres of Southwark station**



Single storey retail with applications in for redevelopment to office or office plus tele-hotel