

Thames Estuary 2050 Growth Commission

2050 Vision

June 2018



Thames Estuary 2050 Growth Commission

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Note: All figures quoted in this document are referenced in the accompanying Technical Document.

Foreword



The Thames Estuary flows from one of the world's greatest cities and passes through areas of extraordinary natural beauty. It stretches from the global financial centre at Canary Wharf past the country's busiest river crossing to world-class coastal wetlands.

The Thames Estuary area faces some real challenges, including significant pockets of deprivation. But we believe it has the potential to support growth across the country. Our vision reflects both the interconnectedness and the distinctiveness of the places that make up the Thames Estuary; a tapestry of productive places along a global river, generating an additional £190 billion GVA and 1.3 million new jobs by 2050. At least 1 million new homes will need to be delivered to support this growth.



The Thames Estuary 2050 Growth Commission was established in March 2016 to develop an ambitious vision and delivery plan for north Kent, south Essex and east London. We are honoured to have been given the opportunity to lead this vital piece of work, which began under Lord Heseltine's chairmanship.

We have carried out the work in close collaboration with our fellow Commissioners and in consultation with local partners. We ran a Call for Ideas from July to September 2016 and were overwhelmed by the response: there were over 100 respondents, including public, private and third sector organisations, and members of the public, all brimming with great ideas and ambitions for the Thames Estuary. We worked with our fellow Commissioners over the next few months to review these responses alongside supporting analysis on the area's key challenges and opportunities. From this, we began to crystallise our thinking on a 2050 Vision for the Thames Estuary, announcing our priorities in December 2017. The conclusions of this work are presented within this 2050 Vision.

Throughout this exciting journey, we took part in numerous visits to the Thames Estuary, including along the river itself, and met with a wide range of stakeholders. We would like to thank all those who have provided input and hosted visits. Your contributions have helped to bring our vision for this exciting area to life.



Sir John Armitt
Chair, Thames Estuary 2050
Growth Commission



Sadie Morgan
Deputy Chair, Thames Estuary
2050 Growth Commission

The Case for Investment

The Thames Estuary is an area with great potential. It has sizeable economic power, a strong feeling of collaboration and a 'can do attitude' from London right out to the sea. The Estuary has an important brand and status, which makes a significant contribution to the UK economy and UK plc.

However, over the past few decades it has consistently been unable to deliver the same levels of economic growth as other parts of the UK. Whilst there are recent success stories, including Canary Wharf and the Thames Estuary's ports, the benefits of these pockets of growth have not necessarily been felt across the area. This has resulted in a large disparity in wealth and opportunity. The Thames Estuary partners want to work together to ensure that this is not an enduring problem.

The Thames Estuary has significant strengths: its proximity to London; international trade via its ports, strong universities, further education and research institutions; and availability of land to deliver high-quality homes. Yet, given its underperformance across a range of social and economic measures (see opposite), identifying what is needed to spread opportunity and growth is a complex task.

In order to answer this question, the Commission has interrogated what has not worked, and why. It has also sought to understand how the significant strengths in the area can be capitalised upon to make sure that economic growth is not reserved for some; rather it can have a lasting impact for existing and new businesses and residents across the area. It has done this through a detailed review of the existing context, engagement with stakeholders over the last two years and a review of existing and proposed projects.

The evidence gathered reaffirms the Commission's view that the 'business as usual' approach is not working. Without concerted action, there is a risk that the Thames Estuary will fail to achieve its potential, at huge opportunity cost to local communities and the national economy. By way of example since 2008, the Thames Estuary (outside London) grew more slowly than any of the other London corridors including, for example, the Thames Valley, London-Stansted-Cambridge corridor.

The Commission acknowledges that the area needs strong delivery and investment to make sure that, as other high growth corridors around London expand, the Thames Estuary is not left behind. The Thames Estuary has vast potential and could catch up with other London corridors that have outpaced UK growth. To do this it needs a clear vision and a focus on delivery.

This 2050 Vision sets out the key challenges and opportunities of the area, alongside future trends. It then presents a vision for the Thames Estuary and resulting recommendations and priorities which will be central to its delivery. This was informed by a review and prioritisation of existing and proposed projects. It concludes with a focus on the governance reforms and delivery models needed to realise the Commission's aspirations.

The Challenges

Scale of the area: The Thames Estuary is home to many boroughs, cities, towns and villages, which have their own distinctive characteristics. The diversity of the area, the natural barrier provided by the River Thames and the different functional economic areas mean that developing a singular 'vision' is challenging; it makes more sense to 'read' the area as a series of interconnected places.

Stimulating economic growth: The Kent and Essex parts of the area have struggled to keep pace with the scale of employment growth in east London. Between 2009 and 2016 east London employment grew by 27%, in comparison to the Thames Estuary average of 19% and the London average of 21%.

Low skills and education levels: There is a higher proportion of adults with no formal qualifications compared with the regional average across the Thames Estuary although this challenge is particularly acute in Essex. Relative to the London, South East and East regions, residents in the Thames Estuary are more likely to work in trade, sales or machine activities, which have historically been less highly skilled. This makes the area a less attractive location for employers seeking skilled and agile workers.

Entrenched deprivation: The area is characterised by a 'low wage' economy with limited connectivity to employment centres and a shortage of jobs and skills. The average weekly household income in the area is £800 before housing costs, which is below the combined average for London, South East and East of England at £885. Most settlements in the Thames Estuary therefore contain neighbourhoods with high levels of deprivation (in the top two deciles of the Index of Multiple Deprivation). The area also has higher levels of unemployment (5.3%) compared with the average for England (4.5%).

Delivering homes: The area needs to cater for population growth and demographic change. Whilst an increased number of planning permissions are being granted, this is not being reflected in delivery rates. Between 2012/2013 and 2014/2015, on average, fewer than 10,000 homes were built per annum against Local Plan targets of 19,495 per annum. Low land values, challenging site conditions and a limited number of house builders are all contributing to the delivery gap.

Limited mobility: Outside of London, the high speed railway network has been the focus of historic transport investment. Beyond this, access to affordable, high-quality public transport or active transport links is more limited between and within cities and towns. This is affecting access to jobs.

Environmental constraints: The Environment Agency estimates that the sea level will rise between 20cm and 90cm by 2100. Without intervention, this could affect up to 1.25 million people who live in the Thames tidal floodplain and 1,200 hectares of internally designated habitats. The Thames Estuary 2100 Plan is the Government's current strategy to adapt to the challenges of future sea level rise. The area also suffers from poor air quality, particularly near congested river crossing points.

Fragmented governance: There are 18 local authorities alongside the Greater London Authority, Kent and Essex County Councils and two development corporations in the area. The lack of coordinated governance structures makes strategic planning and prioritisation of interventions more difficult. This is in the context of significant funding gaps, particularly for infrastructure delivery.

The Future

Jobs: The Commission believes that up to 1.3 million new jobs could be created in the Thames Estuary by 2050. The Industrial Strategy identifies the pillars and priorities for national focus. The Thames Estuary, given its assets, is well placed to deliver against these priorities including boosting economic growth, increasing employment, skills and earning potential and delivering infrastructure to support jobs and homes. This supports the National Infrastructure Assessment which seeks to reduce congestion and carbon whilst increasing the capacity of the country's infrastructure.

Homes: A minimum of 1 million homes will be required to support economic growth in the Thames Estuary by 2050. This equates to 31,250 homes per annum. The Commission believes that the scale and pace of delivery will need to increase to meet this demand. In terms of the distribution of these homes, based on the Ministry of Housing, Communities and Local Government's standardised methodology for calculating housing need, around two thirds of these homes should be delivered in east London. The Commission believes that solely focusing on homes in London is unsustainable and that more of these homes should be provided in Kent and Essex.

Technology and innovation: Sectors and jobs could take a variety of forms in the future. The Commission believes that a skilled and agile workforce will be most able to respond to this uncertainty. Traditional sectors in the Thames Estuary, including ports, logistics and construction, must respond to automation and technical innovation by changing operating practices and the number and types of jobs required.

Economic resilience: The impacts of Brexit on economies are still uncertain and may require changes to the ports, logistics and aviation sectors. The Commission believes that the Thames Estuary can capitalise on the challenges and opportunities presented by Brexit, transforming the area and reducing pressure and reliance on London. This is reflected in the planned and on-going investment, for example, at the Port of Tilbury and London Gateway Port.

Environmental change: The Government's 25 Year Environment Plan sets out action to help the natural world regain and retain good health. It includes a number of policy areas which are relevant to the future of the Thames Estuary: using and managing land sustainably; recovering nature and enhancing landscapes; connecting people with the wider environment; and increasing resource efficiency and reducing pollution. The Commission believes the long view of the 2050 Vision provides an opportunity to embed these principles in the future of the area.

The River Thames is an iconic driver of economic activity. It has led to the rich tapestry of places, communities, landscapes and economies, which characterise the Estuary today. They contribute to the breadth of challenge and opportunity in the area.



The Opportunities

Strengthen existing sectors: The Commission believes that the area should continue to grow ‘traditional’ industries of freight, logistics and construction, capitalising on the five major ports and growing logistics and manufacturing sectors around them as well as the planned modular homes factories. The creative and cultural industries (spearheaded through the Thames Estuary Production Corridor) and medical sectors (e.g. medical instruments manufacturing at Southend-on-Sea) should also be supported.

Diversify sectoral mix: Locally distinctive sectors which capitalise on the area’s assets should continue to be supported, whether they are existing or emerging sectors. The Commission believes this includes health, tourism, creative and cultural industries, agriculture and renewable energy and green technologies.

Utilise higher education institutions: The Commission believes that links between the South East Local Enterprise Partnership, institutions, employers and schools should be strengthened to maximise economic growth and provide pathways from school to employment. This includes building on the skills legacy from large infrastructure schemes in the area such as High Speed 1.

Prioritise infrastructure investment: There are over 327 infrastructure projects identified by local authorities to address existing constraints and/or support future growth in the area. The Commission believes that delivery of infrastructure will support delivery of homes and jobs. For example, the extension of Crossrail to Ebbsfleet could support up to 50,000 jobs and 55,000 new homes. Investment in and delivery of green infrastructure will also be key to securing good growth.

Improve intra-town connectivity: The Commission believes this should be achieved by making better use of existing capacity, and delivering currently planned road and rail infrastructure. Providing additional capacity within the transport network will reduce congestion and journey times. The delivery of transport hubs will provide opportunities for agglomeration and regeneration.

Integrate environmental assets: The Commission believes that the Thames Estuary area provides the long term solution to managing the impacts of sea level rise on London. If appropriately planned, opportunities including maximising flood attenuation and improving air quality should be pursued alongside provision of replacement habitats and improved access for recreation and leisure (as promoted by the Thames Estuary 2100 Plan).

Realise planned development: There is an opportunity to deliver the homes (including affordable homes) and employment space that are needed to support demographic change and new jobs in the area. Homes and jobs should be delivered across the Thames Estuary to support the tapestry of places.



The Vision

From an underperforming river region to a tapestry of ‘productive places’ along a global river.

A lot of good work is already taking place in the Thames Estuary. Examples include public and private investment in the economy (e.g. Port of Tilbury and London Gateway Port), homes (e.g. through Ebbsfleet Development Corporation) and infrastructure (e.g. Lower Thames Crossing). The foundations to build on are strong.

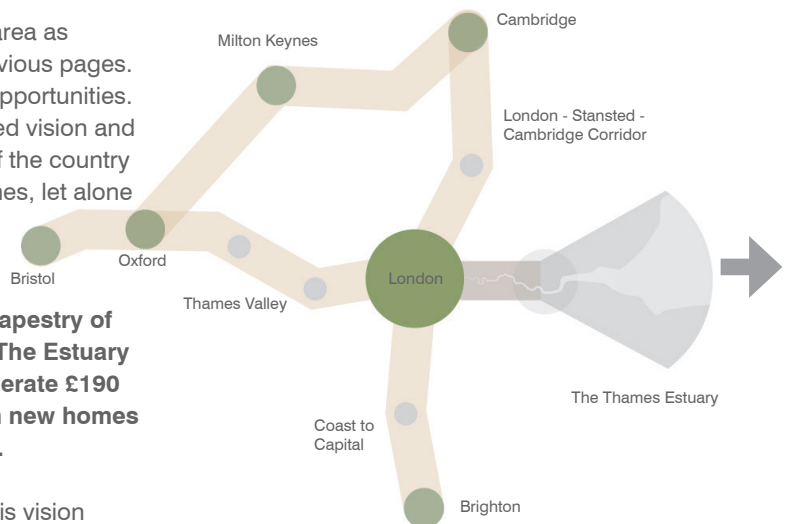
There is significant latent potential in the area as illustrated through the analysis on the previous pages. There are also common challenges and opportunities. However, without a coherent and integrated vision and associated priorities, this important part of the country will not deliver ‘business as usual’ outcomes, let alone more ambitious ones.

By 2050, the Thames Estuary will be a tapestry of productive places along a global river. The Estuary will create 1.3 million new jobs and generate £190 billion additional GVA. At least 1 million new homes will be delivered to support this growth.

The Commission believes that realising this vision requires a change in thinking. The evidence shows that the Thames Estuary will not be successful when considered as a single functional economic area, single place or single community. It is a tapestry of interconnected but different economies, places and people, performing well in parts, but underperforming in others.

The Commission therefore recommends a different structure: a structure of five ‘productive places’, which are based on existing areas and their assets; with a clear vision for each area, a tight focus on priorities and stronger, streamlined governance.

In 2050, this tapestry of ‘productive places’ in the Thames Estuary will form part of the series of productive and connected places that ‘orbit’ London. Like Cambridge and Oxford, the ‘productive places’ of the Thames Estuary will be higher performing places, retaining their own distinct character and economic function.



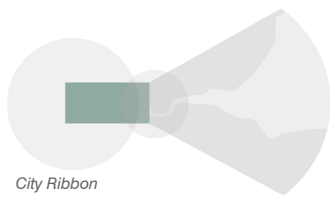
Thames Estuary Today

There is significant potential as an economic area, but there is not a clear economic or spatial framework to realise this potential in comparison to other successful corridors and cities around London like Cambridge, Oxford and Brighton. The current context is:

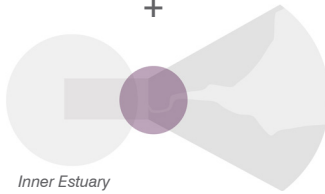
1.3 million jobs

£89 billion GVA

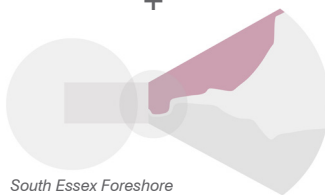
1.4 million homes



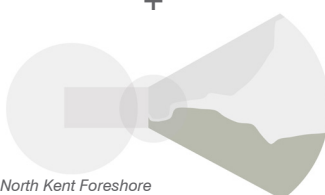
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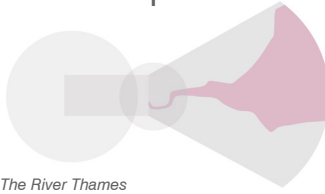
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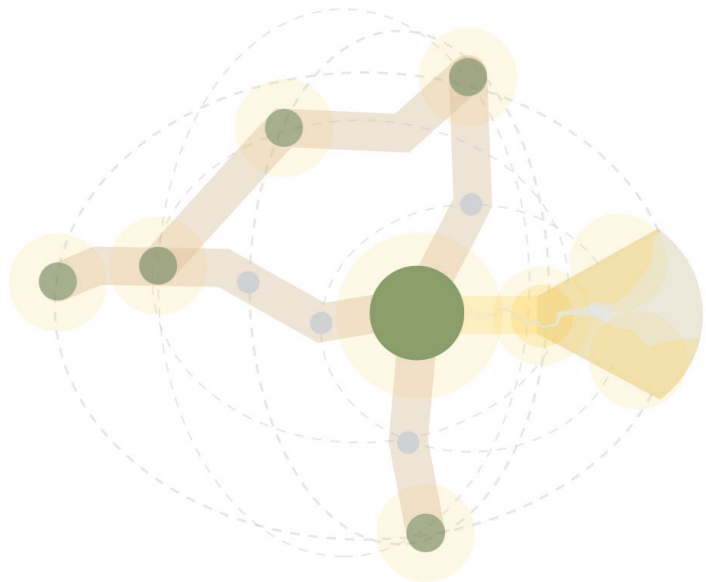
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Five Productive Places

The different areas and characters of the Thames Estuary form into the proposition for five 'productive places'. Individually these places will be more productive and set up to deliver. Places will deliver the Commission's key priorities of:

Sectors

Connectivity and Communities

Delivery

Vision for Thames Estuary 2050

Each of the five places focuses on: developing strong and specific sectors, increasing skills, delivering homes and jobs at scale and pace, addressing the 'low wage economy', connecting to and enhancing natural assets and green infrastructure, and planning for long term and resilient development. This vision aims to deliver:

1.3 million new jobs

£190 billion* additional GVA

At least 1 million new homes

* assuming an annual average growth rate of 1.25% at current GVA per job

The Objectives

The Vision is underpinned by six objectives. They provide further direction on how the Thames Estuary can boost productivity, make a greater contribution to the UK economy and deliver a series of positive outcomes by 2050.

Productive Places

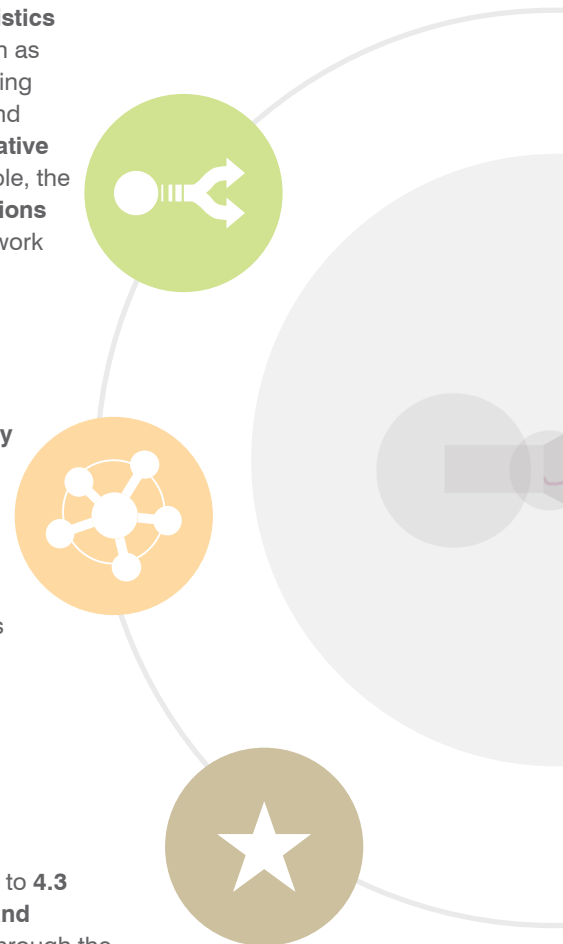
The places of the Thames Estuary will support the sustained growth of its high value, healthy wage sectors achieving up to **1.3 million new jobs by 2050**. Existing sectors will be strengthened including **freight and logistics** and **construction**, maximising opportunities from existing assets such as the **ports**. Emerging sectors will be nurtured including: **health**, reflecting the supercentre in Kent; niche heritage and wildlife **tourism** in Kent and Essex; and the Thames Estuary Production Corridor - a ribbon of **creative and cultural industries** along the River Thames. In part and as a whole, the places will harness entrepreneurial spirit, **strong educational institutions** and **unique natural assets** to create a distinctive and productive network of economies.

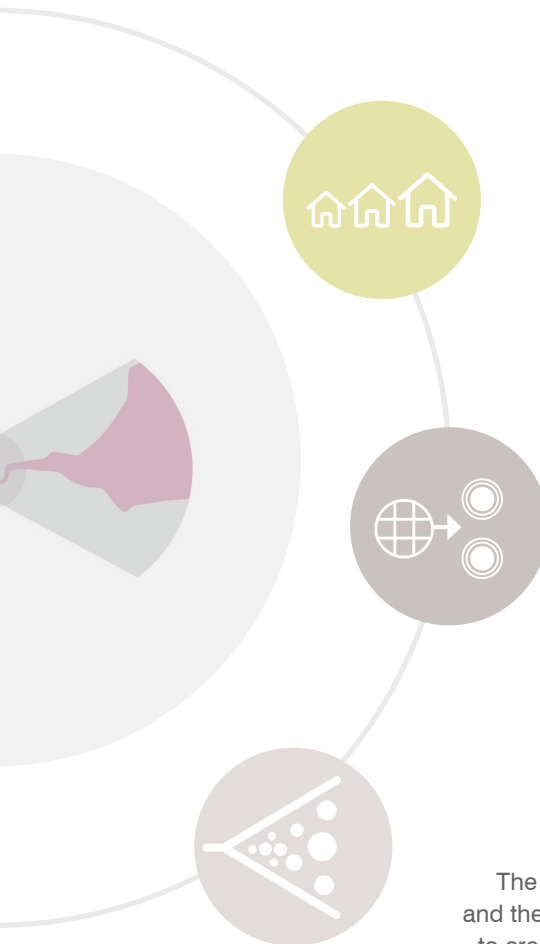
Connected Places

There will be **improved connections** between and within cities, towns, villages and industries be it for people or goods. This will support **improved productivity** through increased access to jobs and services. New and improved rail, bus, cycle and pedestrian links will reduce car dependency and increase the use of the area's **integrated public transport** systems. Completing the Thames Path will also improve connections for recreation for cyclists and pedestrians. The area will benefit from the highest level of **digital connectivity**, adopting the latest technological innovation. New **river crossings** such as the Lower Thames Crossing and Silvertown Tunnel will strengthen local and national links. New railway infrastructure including the extension of **Crossrail 1 to Ebbsfleet** and the **Thames East Line** will connect into the country's high speed network and complete the orbital railway around the Capital.

Thriving Places

The growing communities of the Thames Estuary, which will be home to **4.3 million people by 2035**, will pride themselves on their **rich cultural and economic activity**. Through **people-led projects** - in part delivered through the Thames Estuary Fund - each distinctive city, town and village will be the well-loved **heart of the community**. They will demonstrate the importance of good design and creating attractive places that work for the community. Improved **educational attainment** and **local skills** will **increase aspiration** and show that new job opportunities are for them. These thriving places will be **attractive to investors** and will celebrate their **individual sense of place** by offering bespoke opportunities to live, work, visit and play within the Thames Estuary setting.





Affordable Places

A further **1 million high-quality homes**, balanced to suit the affordable needs of the community, will be provided by 2050. They will offer a diversity of choice to all parts of the community, including **ageing populations**, and ensure that **supply keeps pace with demand**. The production of **statutory Joint Spatial Plans** will set out where these homes will be located and include tools, such as design review panels, to ensure high-quality development is delivered. **Healthy lifestyles** will be supported by the provision of new social places alongside integration with existing places and community networks. This will support **resilient communities** that respond to the needs of residents throughout their lives.

Adaptable Places

The many places and spaces in the Thames Estuary will adapt to the changing environment ensuring the people, economies and ecology of the area **thrive**. Infrastructure investment will be **integrated and multi-functional**, maximising the benefits to people, places, and ecology. This will assist in the creation of nearly **900 hectares of new habitat by 2100** to replace the 1,200 hectares lost to tidal flooding. Projects such as the completion of the Thames Path will provide **improved access to the natural environment**. The use of natural assets for recreation and economic activity will be balanced with their **protection and enhancement**.

Deliverable Places

The Thames Estuary will complete what it has started; delivering the homes and the balanced jobs it has planned, at the required **scale and pace**, in order to create thriving and affordable places. This will be achieved through robust, **locally-led governance** structures, which **build on existing** partnerships and bring together, as needed, the **18 local authorities**, plus the three upper tier authorities. The area will also be a space to try something - a place that **supports innovative models of delivery** be that through capitalising on Modern Methods of Construction (such as modular homes) or innovative models of public sector housing delivery. Across the many places of the Thames Estuary this will enable the **significant aspirations to become meaningful realities**.

City Ribbon

The area 'City Ribbon' includes the east London boroughs of Tower Hamlets, Newham, Barking and Dagenham, Havering, Lewisham, Bexley and Greenwich and the London Legacy Development Corporation.

The core strengths of this place include the **growing cultural and creative industries sector**, supported by the Mayor's Production Corridor, and significant projected **population growth**, which is collectively one of the **youngest on average in London**. This is allied to major regeneration programmes in areas including Barking Riverside and Thamesmead.

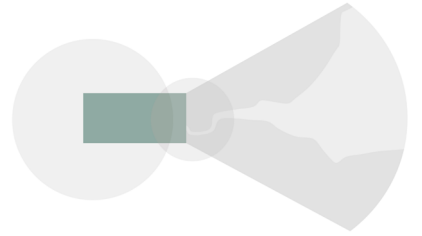
The challenges of the area include integrating and delivering **future connectivity** projects, including river crossings and the Crossrail 1 extension to Ebbsfleet, and ensuring this unlocks the delivery of **affordable housing**. The area suffers from some of the **highest levels of deprivation** in London with **high levels of unemployment** and **low skills**.

Within this context the Commission's vision for City Ribbon is:

Places which celebrate the skills and creativity of the area



City Ribbon will be a hub for production. Space will be created for start-ups and grow-on spaces for small and medium sized businesses. Communities will be connected by multiple public transport links and served by culturally rich town centres. Through the implementation of a multi-generational skills strategy, the area will connect the creative and cultural industries to a highly skilled workforce.



Supporting diverse housing options which take advantage of their river setting

Estate regeneration

THAME
Emphasis on quality of architecture

time economy

Department for Business Innovation & Skills

UNIVERSITY OF PORT



Diverse skills which connect to the activities of the river

Cleaner water

Safe and resilient access to the water for multiple uses

New and multiple means of crossing the river

“Both banks of the Thames were rejuvenated. There are now large blocks of apartments where there were once derelict wharves. Shopping areas, apartments, public houses and walkways . . . The neighbourhood of the river is recovering its ancient exuberance and energy, and is reverting to its existence before the residents and houses were displaced by the building of the docks in the 19th century.”

Peter Ackroyd, Sacred River

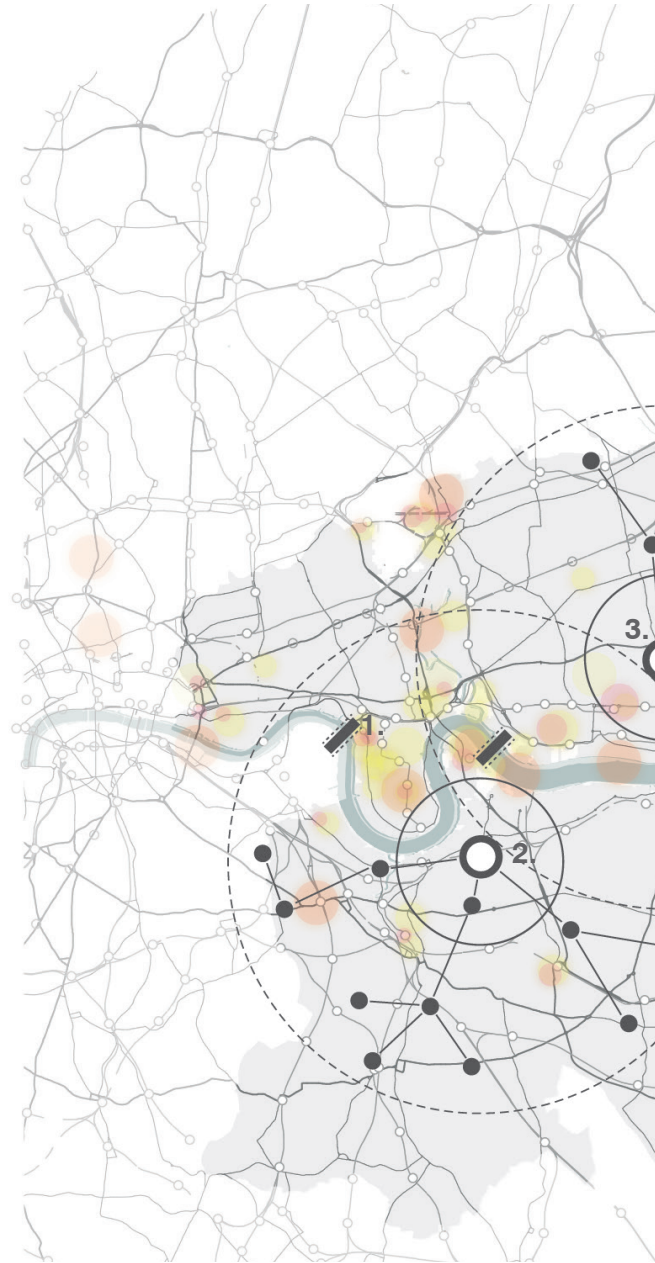
City Ribbon

Within City Ribbon, 196 infrastructure, skills and employment projects were subject to the prioritisation review. Some 139 projects were sifted out where they were either: a duplicate entry; there was insufficient information available on the project to meaningfully assess it; or because it represented 'business as usual' where it was considered that the project would not make a significant contribution to meeting the Commission's vision for the area. Of the remaining 57 projects, 88% contributed to connected places, 82% towards adaptable places and 70% to productive places. Half contributed to affordable places.

In addition, 209 large scale known and proposed employment and residential developments were identified. All the developments were categorised as 'business as usual'.

There is much already happening in City Ribbon, with existing delivery structures in place. However, the Commission believes there are opportunities to make more of what is planned to realise the aspirations for the area. The Commission's priorities are set out opposite.

Beyond these three priorities, there are other projects which the Commission supports and considers are central to its vision for City Ribbon being achieved. These include the expansion of City Airport, the continued growth of Canary Wharf, the delivery of Thamesmead which could provide up to 20,000 new homes - the largest regeneration project in Europe - and the extension of Crossrail 1 to Ebbsfleet. This project is discussed further in the Inner Estuary; within City Ribbon the project could help to accelerate delivery of 30,000 new homes in Bexley, directly unlocking 16,000 of these and support Canary Wharf's ambitious expansion, which is set to create up to 80,000 new jobs.



Accelerated Delivery Pilot



What: Trial new delivery models to accelerate the scale and pace of delivery of homes and jobs in the Opportunity Areas within City Ribbon to bring forward the development stated in the London Plan by 2035. This could be done through housing delivery companies and the public sector acting as master developers.

Why: East London is a major focus for home and job growth. It should showcase how Government is delivering against the Industrial Strategy and need for new homes.

How: The Mayor of London, London boroughs and Homes England should work together to expedite delivery of jobs and homes. These organisations should make best use of existing powers, find solutions to current constraints such as borrowing caps and develop the skills and expertise to enable delivery.

When: Short term to bring forward stated delivery in 50% less time.

Commission's Priorities



Commission's Priorities and Areas of Change: City Ribbon

1. Canary Wharf
2. Greenwich
3. Royal Docks
4. Rainham Marshes
5. Barking Riverside

Employment Sites

- 10+ ha
- 5 - 10ha
- 1 - 5ha
- Other

Housing Sites

- 2,000+ homes
- 1,000 - 1,999 homes
- 500 - 999 homes
- Other

Call for Ideas

- Transport
- Skills
- Other infrastructure

New Thames Crossings



What: Prioritise the planning and funding of river crossings. The Silvertown Tunnel and the DLR extension to Thamesmead should be operational by 2030. A third river crossing should be considered to facilitate homes and jobs.

Why: Poor accessibility limits the ability of the area to realise its full potential. New public transport and active travel crossings will unlock homes and jobs and contribute to place making.

How: The Mayor of London should deliver Silvertown Tunnel as quickly as possible. He should prioritise and bring forward the planning for public transport and active travel crossings.

When: Medium term delivery of the three crossings; short term priority planning.

An Integrated Skills Strategy



What: Implement a more targeted skills strategy that provides clear pathways to employment. It should support the area's existing and emerging economic sectors including the Production Corridor and the growing interest in the cultural and creative industries.

Why: Build on the success of the London Schools programme and be thought leaders for the Thames Estuary. The strategy should showcase how education and skills training can be used to address generational skills shortfalls and reduce levels of unemployment.

How: The Mayor of London should work with the boroughs, the Local Enterprise Partnership, employers and/or educational institutions to translate his Skills for Londoners strategy into a targeted plan for the area to ensure it meets current and future employer needs.

When: Quick win building off existing skills strategies including the Skills for Londoners Strategy and Place Making Institute.



Inner Estuary

High performing dock infrastructure which creates opportunities for a wide range of sectors based in the surrounding community

The area 'Inner Estuary' includes Thurrock, Dartford and Gravesham Councils, and Ebbsfleet Development Corporation. The area has approximately **22km of Thames waterfront**.

The core strengths of this place are its **connectivity** (which supports a growing higher value logistics and freight sector, including the **£1 billion investment in the Port of Tilbury** and further investment in the London Gateway Port) and the planned growth of **new town centres** at Ebbsfleet, Bluewater and Lakeside. The place is also promoting innovation in construction through **Modern Methods of Construction** with a particular focus on modular housing construction.

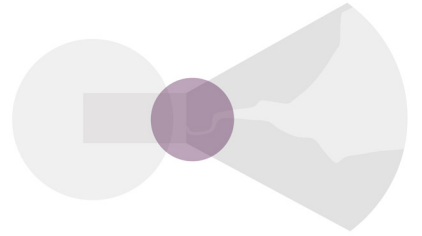
The challenges for the area include the unresolved **approach to the Swanscombe Peninsula**, **air quality** issues as a result of congested **river crossings**, the **slow pace of delivery** at Ebbsfleet Garden City (where delivery of 15,000 planned homes has slowed and there is a lack of job creation), **poor education and skills attainment**, and the need to maximise the homes and jobs that could be unlocked through **infrastructure investment** including the Lower Thames Crossing and Crossrail 1 extension to Ebbsfleet.

Within this context the Commission's vision for the Inner Estuary is:

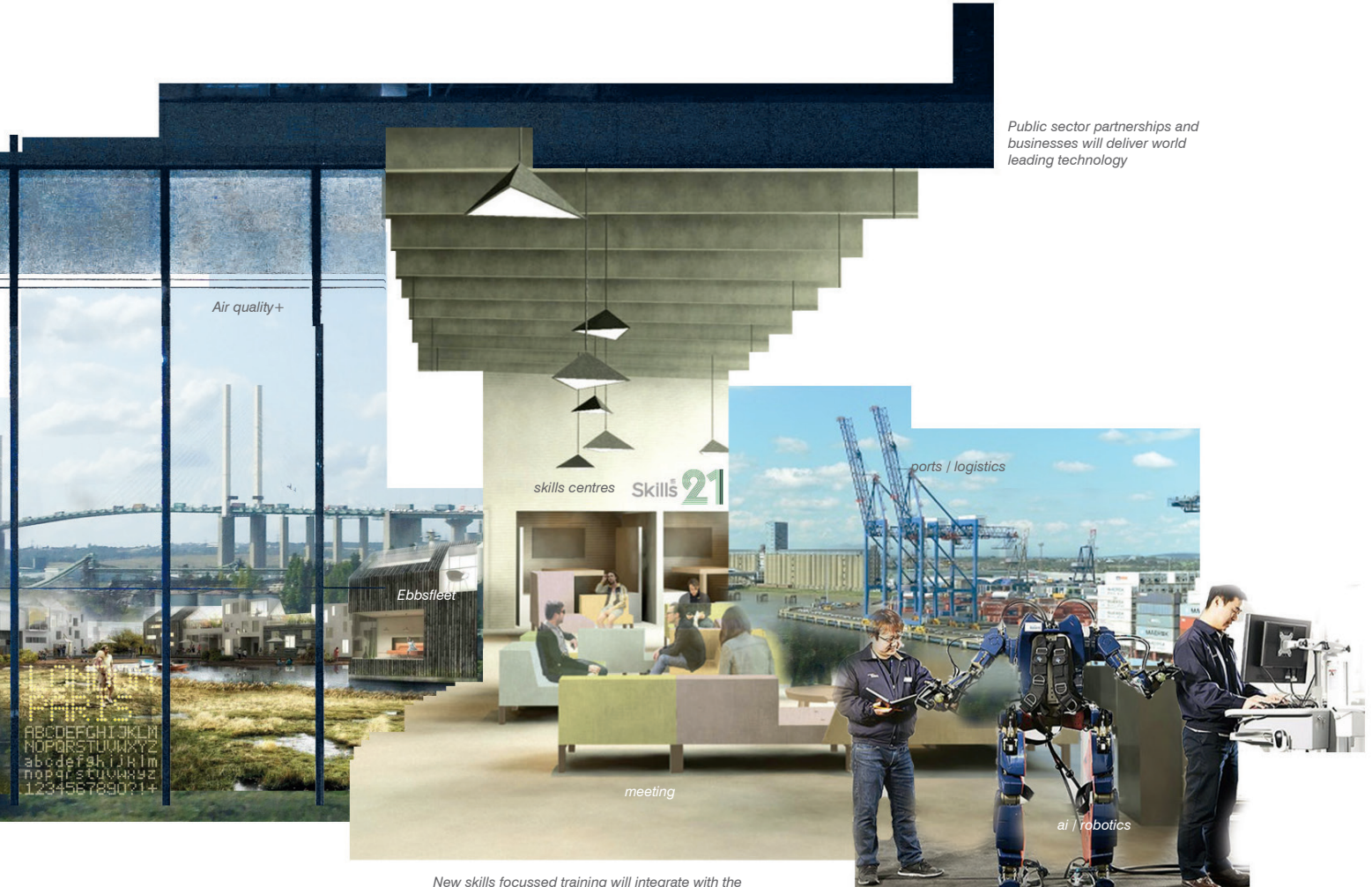
A thriving and higher value Port of Tilbury and London Gateway Port will create opportunities for an upskilled and aspirational population. Healthy town centres will be home to creative businesses and high achieving schools. The delivery of Ebbsfleet Garden City, including a new Medical Campus and integrated sustainable transport systems, will bring new homes and jobs to a unique river landscape.



Innovations in mobility and public transport will connect communities to the adjacent landscapes and diverse employment opportunities



Public sector partnerships and businesses will deliver world leading technology



New skills focussed training will integrate with the work spaces to create thriving centres of medical excellence connected to open spaces that support healthy lifestyles

“A great future lies before Tilbury Docks... free of the trammels of the tide, easy of access, magnificent and desolate, they are already there, prepared to take and keep the biggest ships that float right upon the sea. They are worthy of the oldest river port in the world.”

Joseph Conrad, The Mirror and the Sea

Inner Estuary

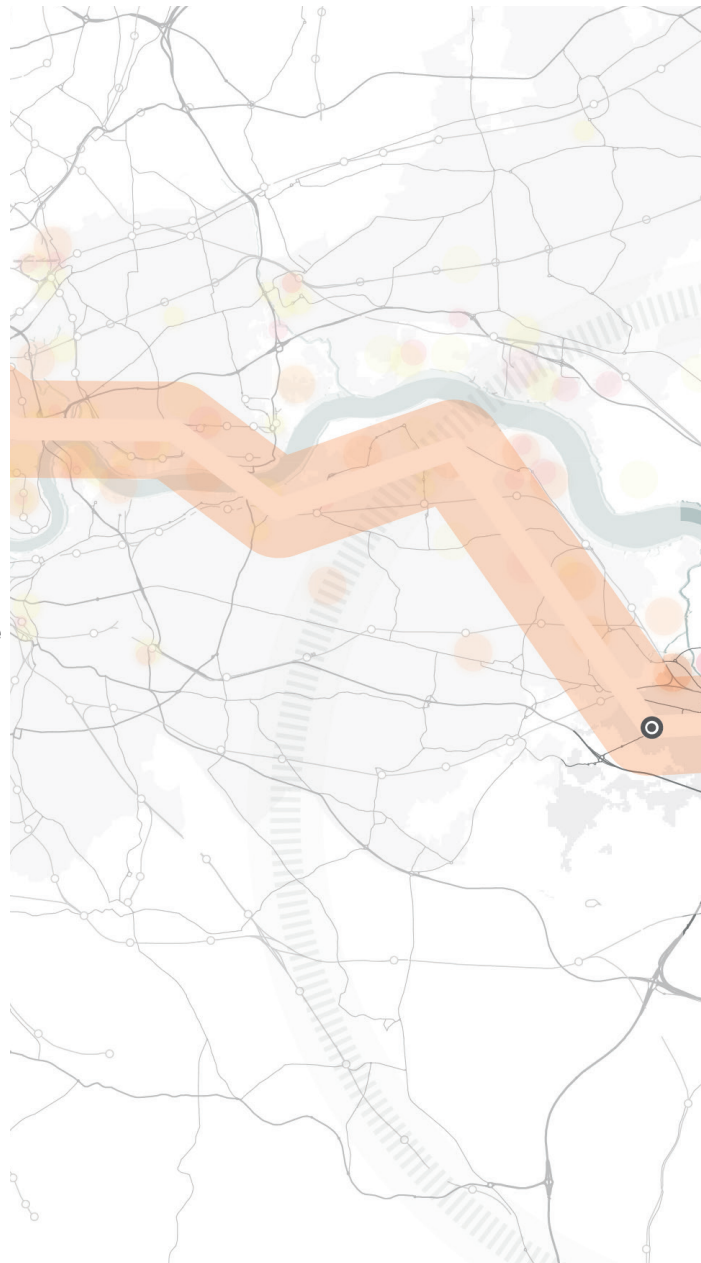
Within Inner Estuary, 109 infrastructure, skills and employment projects were subject to the prioritisation review. Some 73 projects were sifted out where they were either: a duplicate entry; there was insufficient information available on the project to meaningfully assess it; or because it represented 'business as usual' where it was considered that the project would not make a significant contribution to meeting the Commission's vision for the area. Of the remaining 369 projects, almost 64% contributed to productive places and 58% to connected places. Around a third of the projects contributed to each of the affordable, thriving and adaptable places.

In addition, 58 large scale known and proposed employment and residential developments were identified. All of the developments were categorised as 'business as usual'.

The Commission believes there is the potential to increase the scale and pace of delivery through some transformative projects; these priorities are set out opposite.

Beyond the three priorities, there are other projects which the Commission considers central to achieving its aspirations for the Inner Estuary. This includes resolving the proposals for the Swanscombe Peninsula. The Commission encourages the promoters of the London Resort to submit a Development Consent Order application for the proposal as soon as possible. Should an application not be submitted by the end of 2018, the Government should consider all the options for resolving the uncertainty this scheme is creating for the delivery of the wider Ebbsfleet Garden City.

The Commission is supportive of the proposals for the Lower Thames Crossing. However, in order to future-proof the proposed crossing, the Commission believes that the design should, as a minimum, not preclude the future delivery of infrastructure to support rail transport links and/or autonomous vehicles. Highways England should also work with the relevant local authorities to ensure that the design and location of the crossing and connector roads minimise impact on traffic flows, unlock jobs and homes growth in the surrounding area.



Extension of Crossrail 1



Crossrail ©

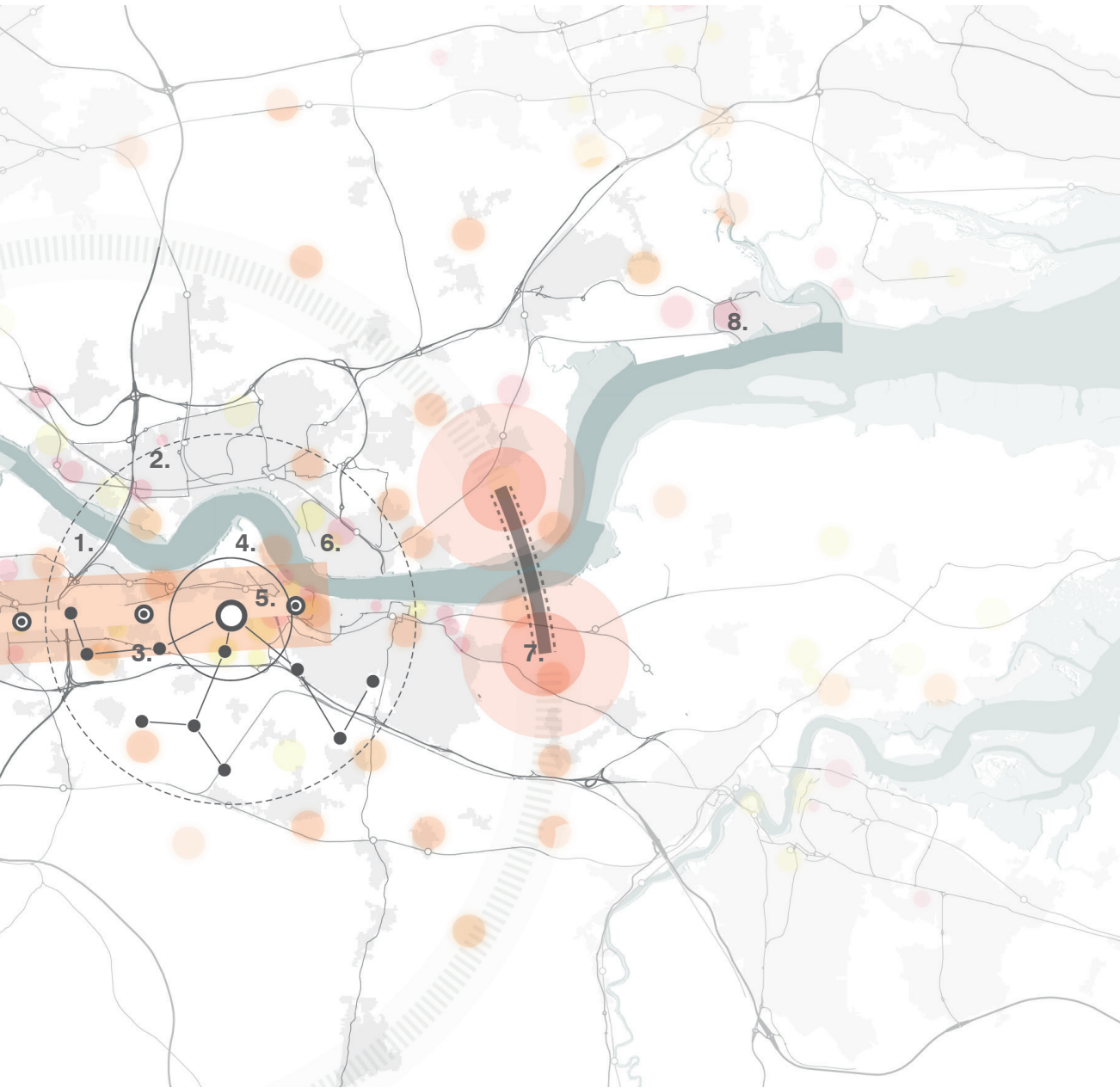
What: Deliver an extension to Crossrail 1 from Abbey Wood to Ebbsfleet.

Why: The project could help to unlock 55,000 new homes, up to 50,000 new jobs and uplift skills and education by increasing rail capacity and creating new connections between economic hubs. This would need to go ahead in conjunction with upgrading supporting junctions. Key growth areas include Dartford town centre, Ebbsfleet Garden City and Swanscombe Peninsula.

How: Government should provide funding for the expected £20m cost of the next phase of project development. This would enable the detailed engineering, design, land and financial modelling and legal framework to be progressed.

When: Medium term delivery of the railway (by 2029); quick win to provide funding for the next phase of project development.

Commission's Priorities



Commission's Priorities and Areas of Change: Inner Estuary

1. Dartford Crossing
2. Lakeside
3. Bluewater
4. Swanscombe Peninsula
5. Ebbsfleet Garden City
6. Port of Tilbury
7. Lower Thames Crossing
8. London Gateway Port

- Employment Sites**
- 10+ ha
 - 5 - 10ha
 - 1 - 5ha
 - Other
- Housing Sites**
- 2,000+ homes
 - 1,000 - 1,999 homes
 - 500 - 999 homes
 - Other
- Call for Ideas**
- Transport
 - Skills
 - Other infrastructure

Transport Innovation Zone



What: Create a Transport Innovation Zone which promotes clean technology in transportation, logistics and data systems and unlocks housing opportunities with new means of public transport.

Why: The area forms part of the national road network for freight movements, and has a high density of tech and digital logistic usage. Also, due to the volume of traffic using its crossings and associated congestion, it suffers from significant air quality issues.

How: Government should incentivise research and development into sustainable travel and related digital technologies where it supports 'clean' movement.

When: Quick win to establish the governance arrangements and associated incentives for the Zone.

Medical Campus

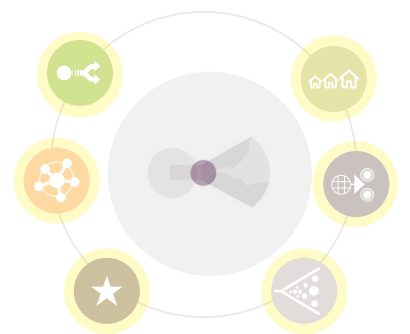


What: Expedite the delivery of the Medical Campus at Ebbsfleet.

Why: Delivery of jobs at Ebbsfleet Garden City has been slower than planned. To make the area more attractive to the market, the delivery of the Medical Campus will provide an anchor employment institution.

How: Government should work with Kings College London to deliver the Medical Campus.

When: Short term (delivery by 2022).



South Essex Foreshore

The area 'South Essex Foreshore' includes Basildon, Castle Point, Southend-on-Sea and Rochford Councils. Southend-on-Sea and Basildon are the major centres of a string of towns to the north of Canvey Island and the marshes around Hadleigh Ray and Holehaven Creek.

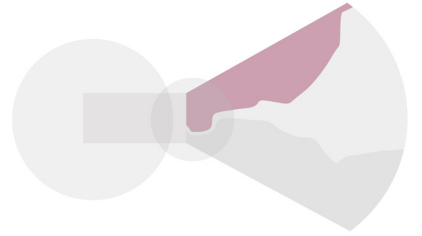
The core strengths of this place include the established and coordinated voice of **Opportunity South Essex**, the **unique wetland habitats** of the river edge and the emerging **cultural sectors** and medical and aviation related **advanced manufacturing in Southend-on-Sea**. The challenges of the area include **poorly performing town centres**, **slow speeds of delivery** linked to limited clarity on priorities across the area, and a **skills and jobs mismatch** between the primary employers and the majority of the workforce. In the future, the threat from **sea level rise** will require major investment in integrated flood defences.

Within this context the Commission's vision for South Essex Foreshore is:

Local Investment in the public realm of High Streets including child friendly spaces



The rich patchwork of places which form the South Essex Foreshore will be celebrated. Empowered by a statutory Joint Spatial Plan the area will go beyond 'business as usual'. Locally driven town centre transformation will help create lively places that people choose to work, live, learn and play in. These policies and local initiatives will see development unlocked, post-industrial landscapes restored, and the filling of empty business spaces to create a thriving and creative economy.



Innovative delivery models for affordable housing and workspace in town centre environments

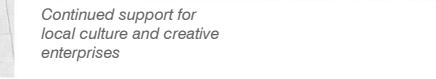


Continued support for distinctive 'Essex' architecture in housing design



Strong connections to Southend Airport to add value / skills to local centres

Protection of, and increased access to, unique foreshore landscapes through partnership



Continued support for local culture and creative enterprises

“What we’ve seen over the past 10 years is this huge burgeoning of the artistic scene in Southend...You’ve got a lot of creative people coming out of London and looking for new, affordable spots. Southend has such an opportunity to be a thriving place for the creative industries, but you need that underlying structure to support it. This is only the starting point.”

Joe Hill, Focal Point Gallery

South Essex Foreshore

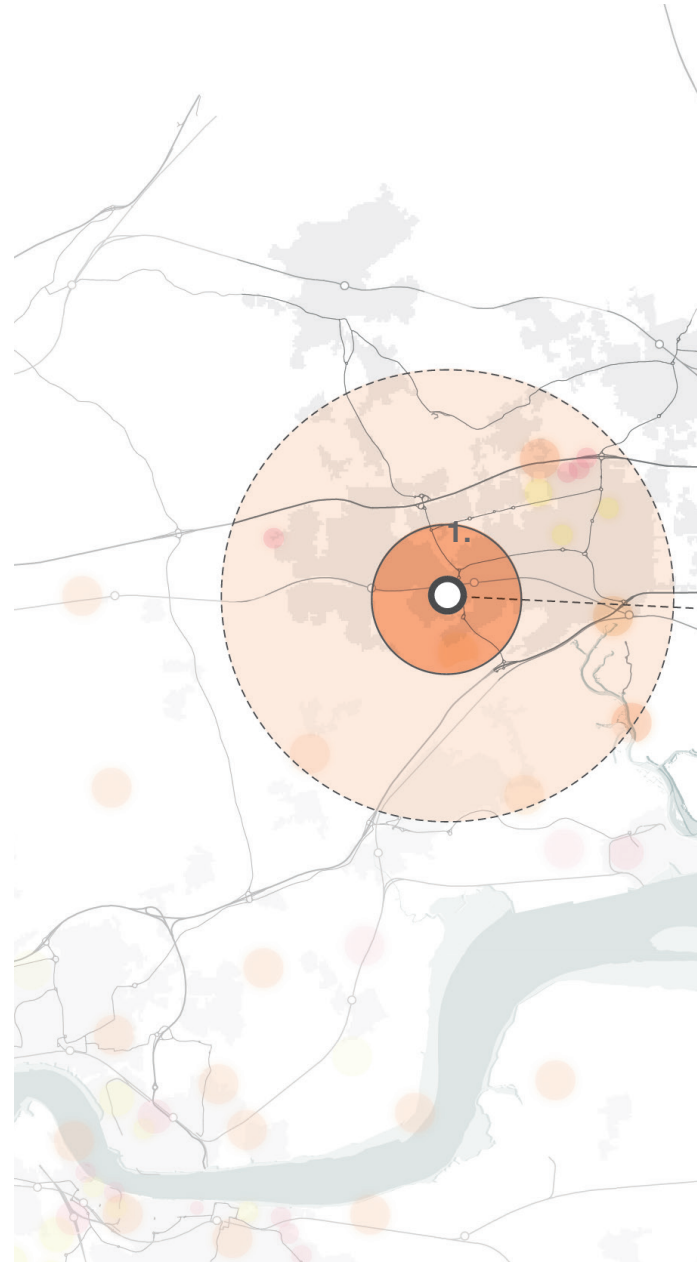
Within the South Essex Foreshore area, 119 infrastructure, skills and employment projects were subject to the prioritisation review. Some 56 projects were sifted out where they were either: a duplicate entry; there was insufficient information available on the project to meaningfully assess it; or because it represented 'business as usual' where it was considered that the project would not make a significant contribution to meeting the Commission's vision for the area. Of the remaining 63 projects, around 71% contributed to productive places, with 49% contributing to connected places and 46% contributing to affordable places.

In addition, 35 large scale known and proposed employment and residential developments were identified. All of the developments were categorised as 'business as usual'.

There is a large number of identified local and strategic projects throughout South Essex Foreshore. The Commission believes that these projects can be better coordinated and prioritised to maximise their impact. The Commission therefore supports the work already being undertaken by local authorities on a Joint Spatial Plan and believes it should have a statutory footing. In completing the Plan, the local authorities should continue to work with other authorities within the Housing Market Area/neighbouring areas, Essex County Council and Opportunity South Essex to produce an integrated strategy for delivering and funding high-quality homes, employment, transport and other infrastructure. The Plan should also be ambitious - going above the minimum housing numbers set by Government - to attract substantial infrastructure investment from Government.

The Commission also supports a number of related initiatives, which are central to achieving its vision for the area. Firstly, local authorities should explore what support can be provided to SMEs, financial or otherwise, to help bring forward needed new employment space. Secondly, planned railway improvements, particularly around Southend-on-Sea and London Southend Airport, should be delivered to increase capacity. Lastly, road, rail and relevant local authorities should work together to minimise conflict between goods and people on the transport network, with the aim of increasing road capacity/number of services on existing railway lines.

Beyond these projects, the Commission has identified three other priorities.



SE Foreshore Fund



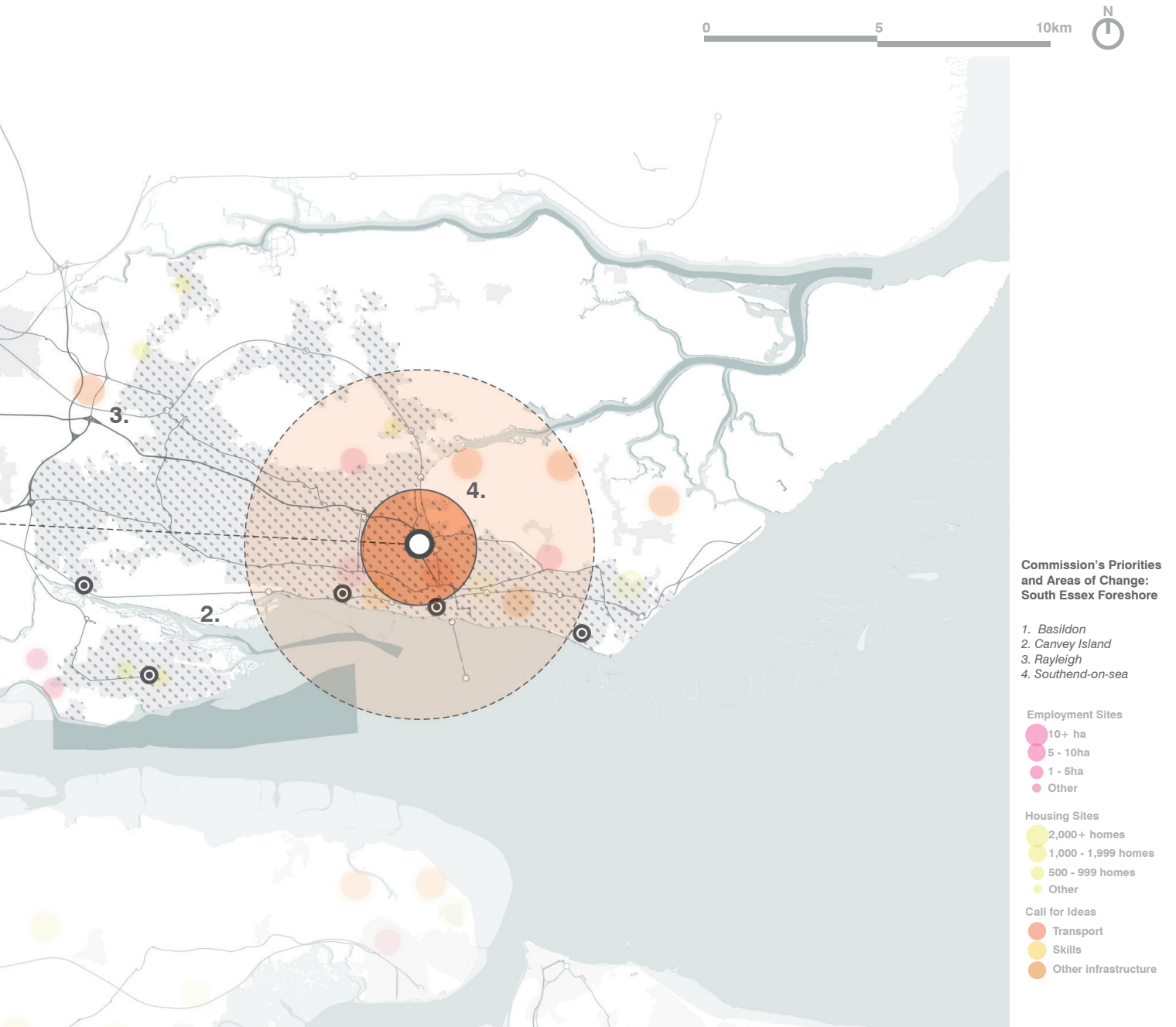
Commission's Priorities

What: Create a fund which local authorities and local communities can bid for. Projects should support town centre regeneration and/or community development.

Why: Give local communities and organisations the opportunity to direct investment where it is most needed to support local aspirations and town centre regeneration.

How: Government to make available a £20 million fund and provide support to the four local authorities and local communities in their funding bids.

When: Quick win for first raft of funding in 2019.



SEC Relocation



What: Expedite the relocation of the South Essex College's Nethermayne campus to Basildon town centre.

Why: This site is central to the Council's aspirations for redevelopment of Basildon town centre. It provides the opportunity to introduce new courses which align with the needs of local employers and sectors and address lower education and skills levels in the area across multiple generations.

How: Basildon Council and Essex County Council should work with South Essex College to deliver the re-location.

When: Short term (delivery by 2022).

Institute for Resilient Infrastructure

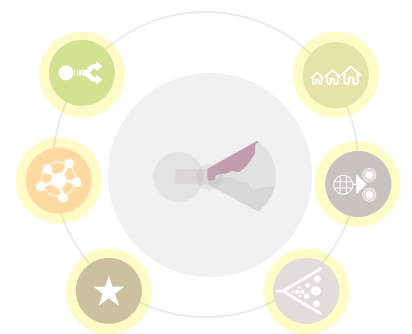


What: Establish a centre for the research, design and funding and financing of integrated infrastructure to address contemporary and future city challenges.

Why: The Institute needs to be up and running to ensure the Thames Estuary has the skills and knowledge needed to design and deliver key infrastructure such as the second Thames Barrier. It will also identify delivery and governance models that can enable strategic infrastructure to be funded by the private sector.

How: Government to approach existing institutions to identify interest. If possible, Government should explore the potential for collaboration with private sector education and technology leaders to provide teaching and skills development training space.

When: Short term delivery (by 2024); Quick win to approach existing institutions.



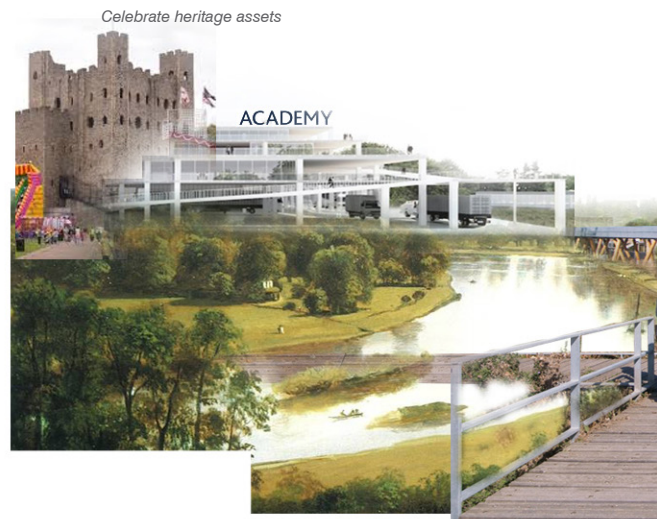
North Kent Foreshore

The area 'North Kent Foreshore' includes Medway, Swale, Canterbury and Thanet Councils. It is a rich and diverse area formed by the **ancient Medway Towns**, and the settlements that stretch along the Roman **'Watling Way'** between Sittingbourne, Canterbury and the arc of distinctive coastal places between Whitstable and Ramsgate.

The strengths of this place include its **universities** which together form an emerging **medical research corridor** connecting the Francis Crick Institute through Chatham to Canterbury. The historic assets of the area's cities are matched by **productive agricultural landscapes** which spread out between them, both of which provide opportunities for continued growth of niche tourism.

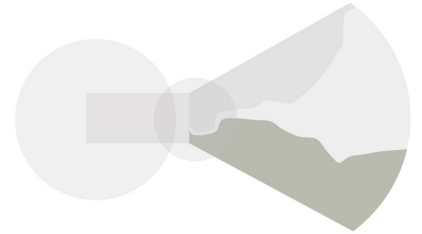
The challenges of the area include the connection between the **skills** needs of employers and the education and skills training available to the community. The area also has a high level of **'digital deprivation'** which is seen to stymie start-up and SME growth in the digital industries.

Within this context the Commission's vision for North Kent Foreshore is:



Improved and managed access to unique wetland landscapes

At the heart of a new medical research corridor, North Kent Foreshore will be home to a supercentre of health and wellbeing. Through a statutory Joint Spatial Plan, and strong connections between local government and business, the area will balance delivering growth in the health sector with new jobs, new homes, a renewed focus on skills, and high-quality town centres set around world-class heritage and natural assets.



New skill centres that connect industry back to communities

Centres of excellence for medical sectors

Intensified Agri-tech

Increased access to landscape as part of strong links between nature, agriculture, health innovation and wellbeing

“The Thames Estuary is an edgeland - not quite river, not quite the open sea. It is an in-between place, a place of transition, a welcoming gateway, a corridor of trade, the front line for the defence of the realm and a gradual opening into the rest of the world.”

Colette Bailey, Artist Director of Metal

North Kent Foreshore

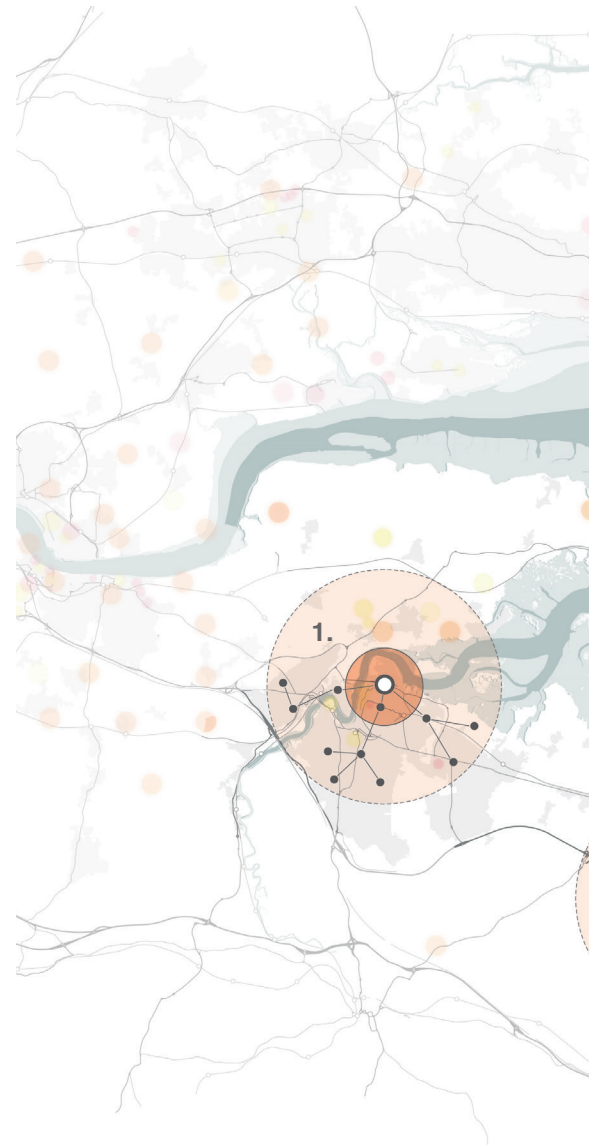
Within the North Kent Foreshore area, 152 infrastructure, skills and employment projects were subject to the prioritisation review. Some 67 projects were sifted out where they were either: a duplicate entry; there was insufficient information available on the project to meaningfully assess it; or because it represented 'business as usual' where it was considered that the project would not make a significant contribution to meeting the Commission's vision for the area. Of the remaining 85 projects around 80% contributed to productive places, 75% to connected places and 42% to affordable places.

In addition, 54 large scale known and proposed employment and residential developments were identified. All of the developments were categorised 'business as usual'.

There are significant opportunities for growth and development in North Kent Foreshore. The Commission believes that further work is needed to coordinate initiatives already underway and to propose new initiatives to optimise the potential outcomes. This should be achieved through a statutory Joint Spatial Plan led by the local authorities, with the participation of other authorities within the Housing Market Area/ neighbouring areas, Kent County Council and Thames Gateway Kent Partnership to produce an integrated strategy for delivering and funding high-quality homes, employment, transport and other infrastructure. The Plan should also be ambitious - going above the minimum housing numbers set by Government - to attract substantial infrastructure investment from Government.

The Commission also supports the following related initiatives, which are central to achieving its vision for the area: local authorities should explore what financial and other support can be provided to SMEs to help them bring forward needed employment floorspace; planned railway improvements particularly around Canterbury should be delivered to increase capacity; and road and rail authorities should work together (with local authorities where relevant) to minimise conflict between goods and people with the aim of increasing road capacity/number of services on existing railway lines.

Beyond these projects, the Commission has identified three other priorities. These are set out opposite.



NK Foreshore Fund



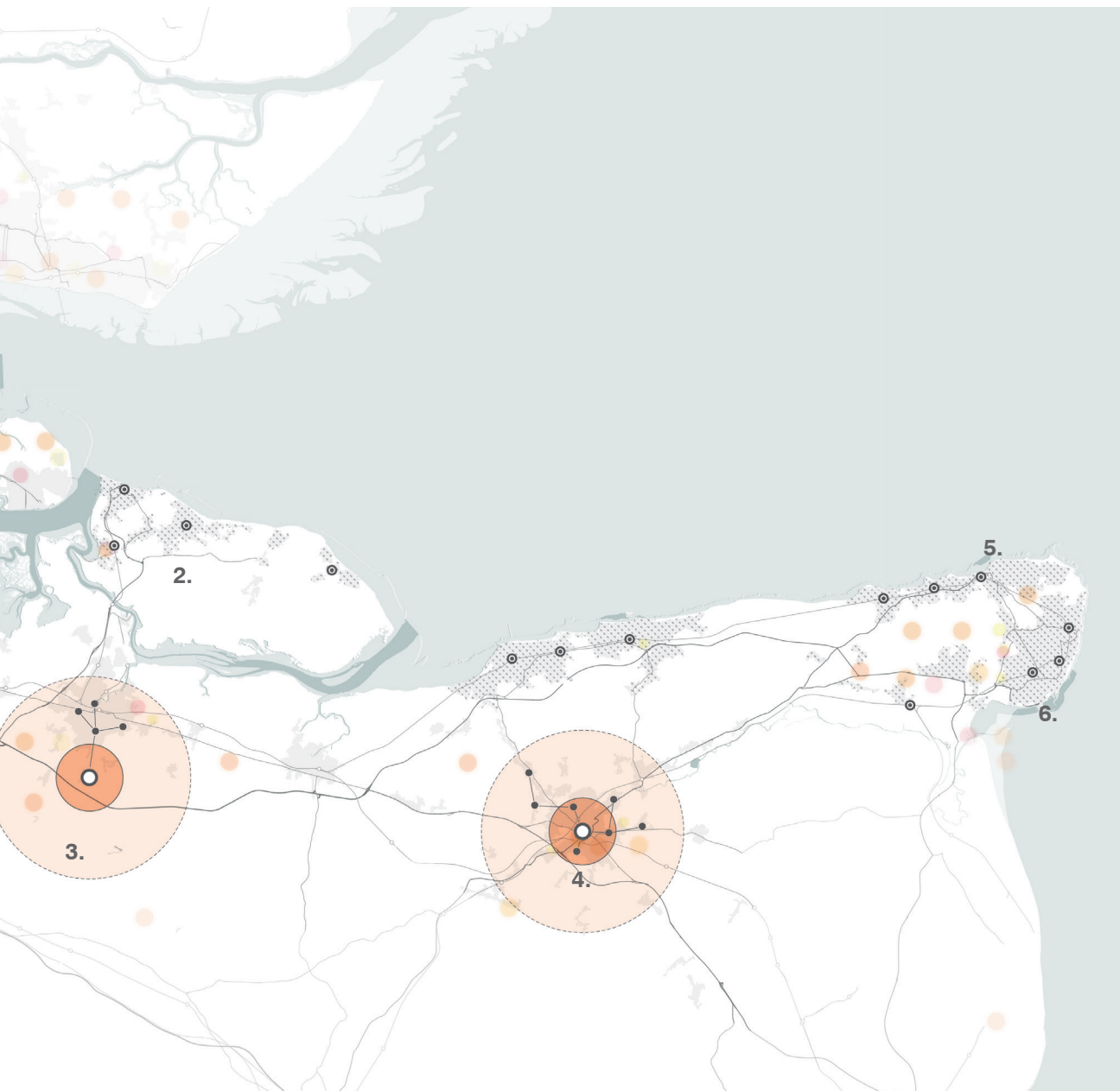
What: Create a fund which local authorities and local communities can bid for. Projects should support town centre regeneration and/or community development.

Why: Give local communities and organisations the opportunity to direct investment where it is most needed to support local aspirations and town centre regeneration.

How: Government to make available a £20 million fund and provide support to the four local authorities and local communities in their funding bids.

When: Quick win for first raft of funding in 2019.


Commission's Priorities







Commission's Priorities and Areas of Change: North Kent Foreshore

1. Rochester
2. The Hoo Peninsula
3. Sittingbourne
4. Canterbury
5. Margate
6. Ramsgate




Employment Sites

-  10+ ha
-  5 - 10ha
-  1 - 5ha
-  Other

Housing Sites

-  2,000+ homes
-  1,000 - 1,999 homes
-  500 - 999 homes
-  Other

Call for Ideas

-  Transport
-  Skills
-  Other infrastructure

Education and Skills



What: Implement a more targeted skills strategy with employers and educational institutions that provides clear pathways to employment that support the area's existing and growing economic sectors.

Why: The 30 year vision allows this project to address generational skills shortfalls. It will improve educational attainment and skills in the area, across multiple age groups, therefore reducing levels of unemployment.

How: Kent County Council should work with the local authorities, the Local Enterprise Partnership, employers and/or educational institutions to develop a targeted plan for the area, which meets current and future employer needs.

When: Quick win building off existing skills strategies in place.

Health Supercentre

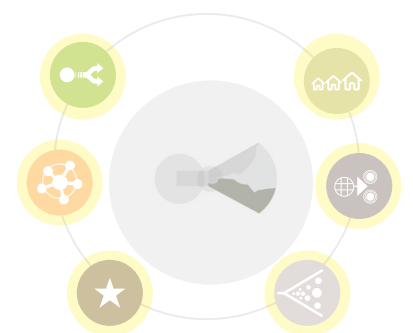


What: Develop the new health and medical facilities at Canterbury to provide the eastern anchor to the supercentre.

Why: This project will act as a catalyst to the health supercentre building on the emerging health sector, cluster of academic institutions and transport connections in the area to increase productivity and jobs in the area.

How: Universities should be supported by Government and work closely with local communities to deliver promised facilities, to boost medical research and services while supporting workforce retention.

When: Short term delivery of facilities (by 2023).



The River Thames

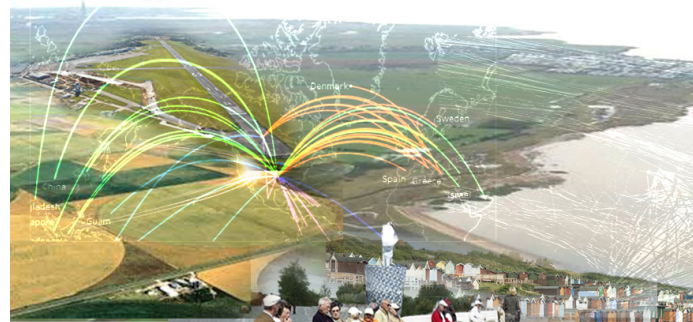
The River Thames is the **ancient heart** of the places of the Thames Estuary. It is a **global river** - connecting the Capital and five of the UK's largest ports to the rest of the world.

The strengths of the river remain its **strategic role** as a gateway to UK trade and industry and a vital and **flexible** component of the national infrastructure strategy. This is **balanced** by its **unique natural qualities** of ecology, habitat and landscape, which have long inspired the area's cultural and creative industries. The River Thames defines the quality of place of the cities, settlements and deep 'foreshores' which line it.

One of the challenges to the River Thames supporting the growth of the area is its **fragmented governance**. The multiple agencies (including the Environment Agency, Natural England, Port of London Authority, Marine Management Organisation) and private agendas prevent integrated solutions to some of the river's key challenges. **New crossings** will require careful integration, and the mitigation of sea level rise with **multi-functional defences**, which protect people and infrastructure from flooding will require new and innovative ways of working. Improving **water quality** and increased use of the river for **aquaculture** and **leisure** will enable the river to play a key role in the area's sustained growth.

Within this context the Commission's vision for the River Thames is:

The river's ebb and flow will continue to connect the Foreshores, Inner Estuary and City Ribbon. Its multi-functionality will continue to evolve, from freight to fishing and from beach to boardroom - constantly emphasising the value of the river to its surrounding places and ensuring that the current level of flood protection is maintained. Its vital contribution to economic and social prosperity will place it at the heart of Thames Estuary 2050.



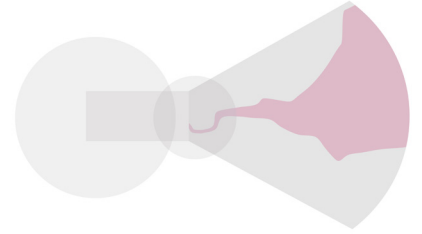
Accessible banks / Thames Path



Innovative agriculture



A continuous Thames Path - celebrating the diversity of the River along its length



Centre for future logistics - connecting the assets of the river to local skills and local jobs

renewable energy innovation

Global shipping growth

Continued investment in culture and programming of the River and its connected communities

“The River Thames is ancient; older than England, older than humanity, even older than the British Isles themselves. Its life cycle operates on a geological timescale. The river is almost a living being, writhing sinuously across its flood plain, eroding its banks and altering its channel, constantly changing.”

Andrew Sargent, The Story of the Thames

The River Thames

Within the River Thames, 25 infrastructure, skills and employment projects were subject to the prioritisation review. Some 15 projects were sifted out where they were either: a duplicate entry; there was insufficient information available on the project to meaningfully assess it; or because it represented 'business as usual' where it was considered that the project would not make a significant contribution to meeting the Commission's vision for the area. Of the remaining 10 projects, 80% contributed to adaptable places and 70% contributed to connected places. This reflects that the projects largely focus on environmental improvements associated with flood defences and increasing access to the river.

No large scale known and proposed employment and residential developments were identified.

The Commission believes the River Thames can be a catalyst for growth and change in the four other 'productive places'. In order to do so it must be well used and well-loved. Three priorities have been identified to achieve this.



Great Thames Park



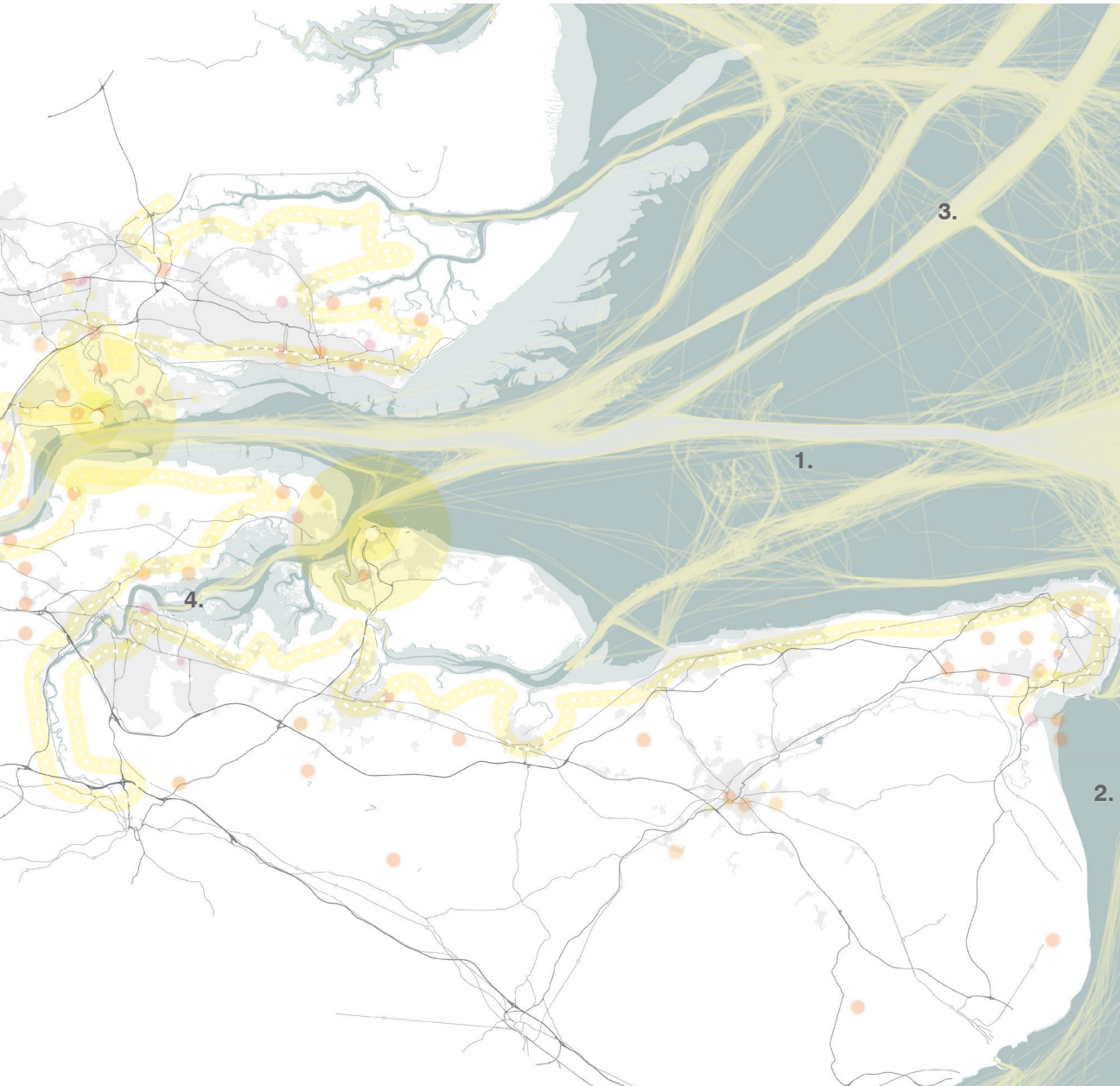
Commission's Priorities

What: Establish the Great Thames Park to celebrate and maximise the value of the area's natural assets. This should include improving access to and use of the River Thames for pedestrians and cyclists.

Why: It will create a 'brand' which attracts inward investment as well as residents and visitors to the area and improves connections between places.

How: Local authorities, environmental bodies and river regulators should prioritise investment in the Thames Path and associated projects. Government to consider the governance arrangements required to support the Great Thames Park.

When: Medium term with measures in the short term to put governance strategies in place. Quick win to deliver first new section of the Thames Path by 2020.



Commission's Priorities and Areas of Change: The River Thames

- 1. River Thames
- 2. English Channel
- 3. North Sea
- 4. River Medway

Employment Sites

- 10+ ha
- 5 - 10ha
- 1 - 5ha
- Other

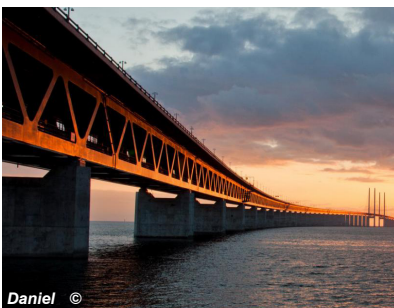
Housing Sites

- 2,000+ homes
- 1,000 - 1,999 homes
- 500 - 999 homes
- Other

Call for Ideas

- Transport
- Skills
- Other infrastructure

Thames East Line



What: Delivery of new multi-modal (including rail) crossing east of the Lower Thames Crossing combined with the second Thames Barrier. Potential interchange points could be Basildon and the Medway Towns.

Why: To maximise the benefits arising from a second Thames Barrier (which will provide a world-class standard of flood protection) including improved north-south connectivity, enhanced linkages with other high productivity corridors around London, agglomeration opportunities at interchanges and improved access to England's high speed railway network.

How: Government should consider a multi-modal crossing as part of its planning for the next Thames Barrier. This includes the financing models which could be used to deliver the project by 2050.

When: Long term delivery with measures in the short and medium term to commence project planning.

Celebrate the Thames

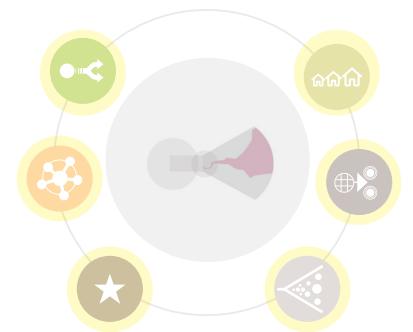


What: Build on the success of the existing Thames Festival and the Port of London Authority's Thames Vision to create a programme of festivals, events and promotional activities.

Why: To celebrate the River Thames, its creative and cultural industries and to attract inward investment and visitors to the area.

How: A programme of events should be developed and led by the Thames Gateway Strategic Group working with local businesses and community groups.

When: Quick win to ensure additional funding and support for Estuary Festival 2019.



Governance and Delivery

The Commission has an ambitious vision for the Thames Estuary, which it believes has the potential to deliver 1.3 million new jobs and £190 billion additional GVA by 2050. At least 1 million new homes will need to be delivered to support this growth, but the Commission believes there is scope for the Thames Estuary to be even more ambitious in responding to London’s ever growing housing need. Realising this ambition will require a coordinated delivery plan, which will in turn be dependent on strong, streamlined governance.

The resounding message from the consultation that the Commission has undertaken is that there is ambition in the Thames Estuary to deliver high-quality development and the best economic outcomes for people. However, the Commission believes that a ‘business as usual’ approach will not deliver growth at scale and pace; governance reform and new delivery models are needed.

The Commission believes that Government should work closely with local partners to determine the governance reform required to drive growth in the Thames Estuary. In the first instance, the Commission recommends that a **robust, locally-led review of governance arrangements be undertaken, to be concluded within six months**. This review should bring forward proposals for strong, streamlined governance arrangements to drive growth - particularly in Kent and Essex - but encompassing the whole area. In undertaking the review, local partners should draw on lessons learned from places that have secured City, Devolution and Growth Deals, attracted major private sector investment, and delivered significant change.

It is right that local partners should, in the first instance, define the governance reform needed to drive growth in the Thames Estuary. However, if robust proposals to reform governance and drive delivery are not forthcoming from local partners within six months, a more top-down approach will be required.

The Commission has undertaken extensive engagement over the past two years and carefully considered the case for the role of governance reform in driving growth in the area. The Commission believes that the optimal governance arrangements should include the following:

A single voice for the Thames Estuary through a strengthened and streamlined Thames Gateway Strategic Group (TGSG): The TGSG as presently constituted is ill-equipped to articulate a shared vision and strategy for the area. Local authorities should strengthen it by providing capacity funding and streamlining membership, so that it may speak to Government with a single voice on key strategic, Estuary-wide issues. Government should endorse the Chair of the TGSG, who would act as a single ‘champion’ for the Thames Estuary to spearhead collaboration and help make the case for inward investment.

The development of statutory Joint Spatial Plans in Kent and Essex: The Commission believes that, to enable the continued prioritisation of investment, statutory Joint Spatial Plans should be produced in Kent and Essex. The precise geography should be defined by local partners in the first instance as part of the locally-led governance review, building on existing collaborations and administrative boundaries. On this basis, there is a clear case for focusing a Joint Spatial Plan on south Essex, where work is already underway. The optimal geography for a Joint Spatial Plan in north Kent is less clear, and local authorities should work

toward agreeing a preferred geography within the next six months. The Plans should build consensus around areas of focus, continue to strengthen the growth narrative for the area, and package and prioritise key projects. This will enable more effective delivery and provide a stronger focus for attracting private sector investment. If these Plans demonstrate sufficient growth ambition - going above the minimum threshold set out by Government for local housing need; and being given statutory status - **Government should reward this ambition with substantial infrastructure investment and freedoms and flexibilities**. This could take the form of a 'roof tax', or other incentive to accelerate housing delivery and support growth.

A revision of the geographical boundaries of South East Local Enterprise Partnership (LEP): Analysis undertaken by the Commission suggests that the Thames Estuary is a tapestry of productive places, requiring tailored growth strategies. Through the locally-led governance review, local partners should bring forward proposals to revise the geographical boundaries of South East LEP. South East LEP is one of the biggest LEPs in the country, second only to London in terms of population and number of local authorities. The Commission suggests that local partners consider the formation of two new LEPs within the Thames Estuary, one for Essex, Southend-on-Sea and Thurrock, and another for Kent and Medway. Aside from geography, the Government review into strengthening LEPs should consider the best organisational structure for LEPs, and whether they are adequately resourced to drive growth.

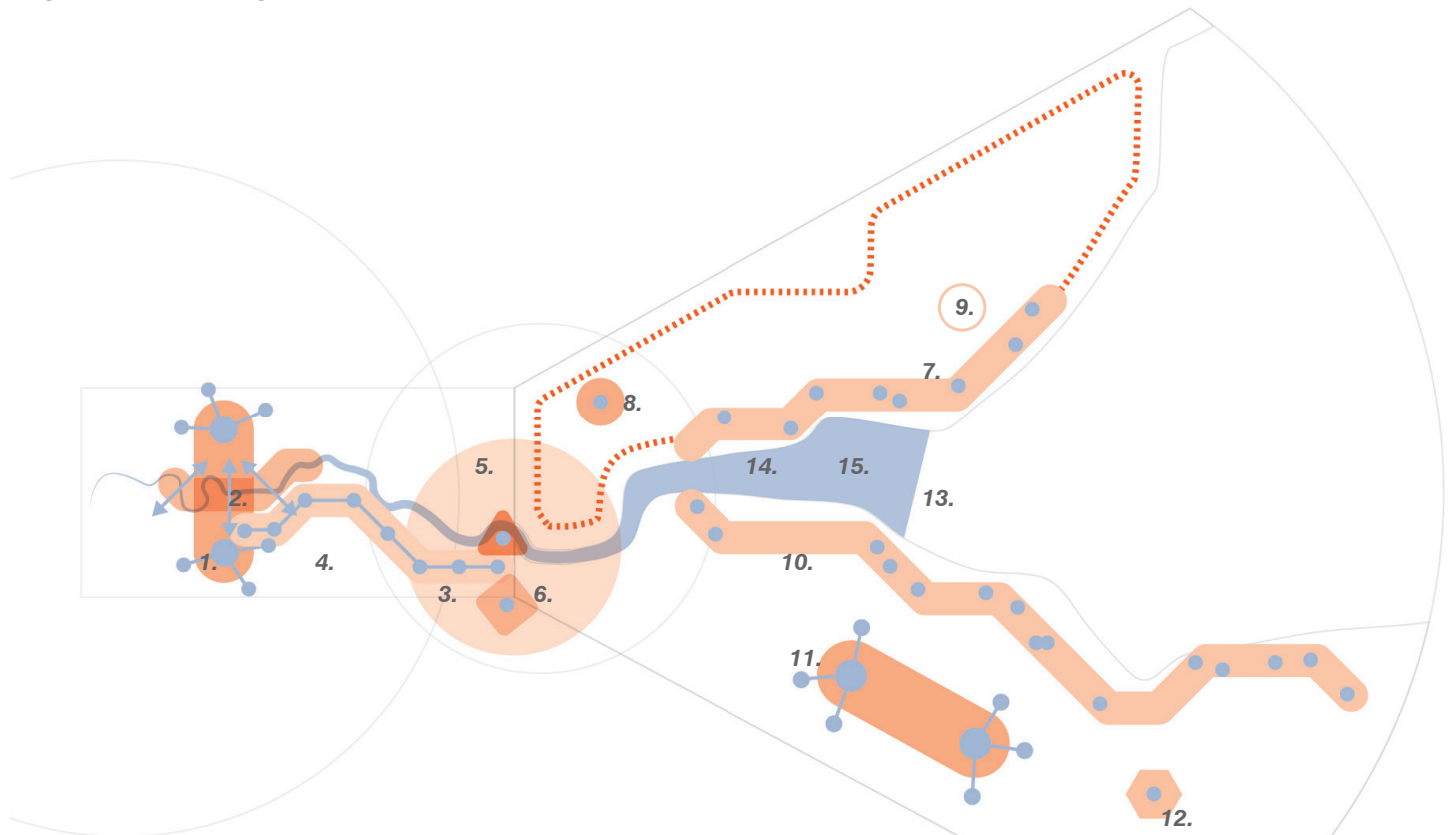
Development corporation(s) with planning, and compulsory purchase powers to drive the delivery of homes and jobs aligned to major infrastructure investment: Whether these are locally-led should be dependent on the scale of the development. In addition, local partners should consider whether Homes England's full resources and powers, including plan-making and development control powers, should be deployed to maximise the local growth benefits of major infrastructure investments like the Lower Thames Crossing. The Commission believes that development corporations, backed by substantial investment, planning powers and freedoms and flexibilities from Government, and coordinated by a strengthened and streamlined TGSG would be an effective way to drive growth in the Thames Estuary in key opportunity areas across the Thames Estuary.

Strengthened governance arrangements for the River Thames itself: The creation of a co-ordination office or lead organisation could be more effective in maximising the potential of the River Thames.

In return for strengthened and streamlined governance arrangements, the Commission would like to see **revenue raising powers and tax (or other) incentives granted to the Thames Estuary** to drive delivery of infrastructure, housing and jobs.

The Commission's Priorities

The Commission believes that the fifteen priorities identified in this document are critical to achieving its vision for the Thames Estuary by 2050. The priorities for each 'productive place' should be pursued simultaneously so that their impact is maximised and they work together to provide 'whole place' solutions.



QUICK (BY 2020)

- 3. *An Integrated Skills Strategy*
- 5. *Transport Innovation Zone*
- 7. *SE Foreshore Fund*
- 9. *Institute for Resilient Infrastructure*
- 10. *NK Foreshore Fund*
- 11. *Education and Skills*
- 13. *Great Thames Park*
- 15. *Celebrate the Thames*

SHORT (BY 2024)

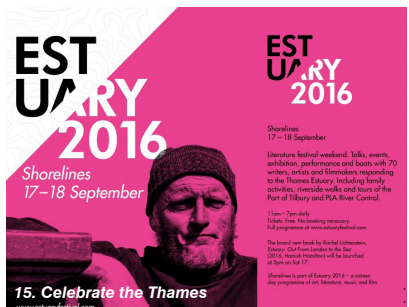
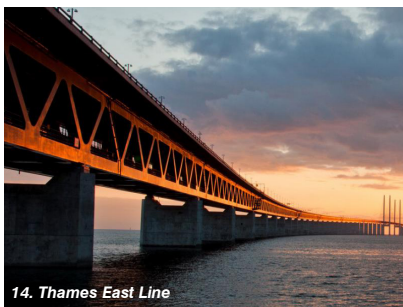
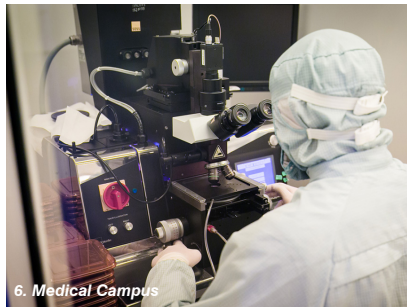
- 1. *Accelerated Delivery Pilot*
- 6. *Medical Campus*
- 8. *SEC Relocation*
- 12. *Health Supercentre*

MEDIUM (BY 2030)

- 2. *Three New Thames Crossings*
- 4. *Extension of Crossrail 1*

LONG (BY 2050)

- 14. *Thames East Line*



ARUP

