HATCH REGENERIS

Bakerloo Line Extension
Local Economic Impact Assessment

A Final Report by Hatch Regeneris

July 2020

London Boroughs of Lewisham & Southwark

Bakerloo Line Extension
Local Economic Impact Assessment

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Glossary of Key Terms

BLE	Bakerloo Line Extension
BLE Corridor	Statistical study area for the extension made up of the catchment areas around the new stations
Bromley	London Borough of Bromley
CEZ	Creative Enterprise Zone
CO2	Carbon Dioxide
DLR	Docklands Light Railway
GVA	Gross Value Added – a measure of economic output
HACT Social Value Bank	Housing Associations' Charitable Trust's bank of methodologically consistent and robust social values.
Healthy Streets Assessment	A tool to help designers include approaches to make London a greener, healthier and more attractive place. It can be used to assess a location against 10 key indicators
IMD	Index of Multiple Deprivation
Lewisham	London Borough of Lewisham
LSOAs	Lower Super Output Areas are the smallest geographical areas that are used to report census statistics. They align to the census zoning hierarchy and are usually sized to cover around 1,500 residents. There are 4,835 LSOAs in London.
LVU	Land Value Uplift. If development results in a change of land use (i.e. from disused brownfield land to residential or employment uses), the value of the land will increase to reflect its new, more productive use. In these circumstances, the increase in land value will reflect the economic benefits associated with the development. Government guidance states that Land Value Uplift 'should be the primary means of assessing the benefits of a development'.
NPV	Net Present Value. A way of combining an on-going stream of economic costs and benefits that will be derived across a period of two or more years. It offsets the fact that receiving £100 of benefit today is more attractive than receiving £100 of benefit in next year or in any subsequent year. A discount rate is applied to future year costs and benefits to reduce their value in today's prices.
OKR	Old Kent Road
PM 2.5	Fine particulate matter which is an air pollutant and can affect people's health when levels are high
PSF	Pounds per Square Foot

PTAL	Public Transport Accessibility Levels
Southwark	London Borough of Southwark
TfL	Transport for London
TfL Liveable Neighbourhoods	TfL funding available to London Boroughs to encourage walking, cycling and the use of public transport
TIM Travel Catchments	Travel Time Mapping software from TfL to show travel time data
Transport and Works Act Order	A TWA Order is a statutory instrument made under the Transport and Works Act 1992. TWA Orders are required to authorise the construction or operation of railways
Walking Catchment	PTAL calculation term, derived a standard walk speed of 4.8kmph.

1. Introduction

1.1 Hatch Regeneris and We Made That were commissioned by the London Boroughs of Lewisham and Southwark (Lewisham and Southwark hereafter) to undertake an assessment of the local economic and social impacts of the Bakerloo Line Extension (the BLE hereafter) in the two boroughs.

1.2 The primary aim of the study is to identify the type and scale of local impacts that can be expected to result from the increased transport capacity and accessibility provided by the BLE. It is also to inform future strategy development regarding benefits realisation, and to tie into masterplanning work already underway in areas such as the Old Kent Road, New Cross Gate and Lewisham.

What is the BLE?

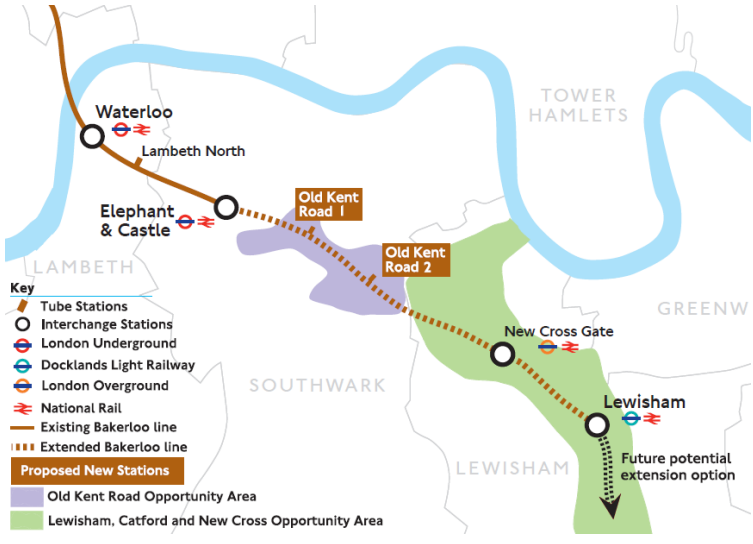
1.3 The BLE is a proposal to extend the existing Bakerloo Line beyond Elephant and Castle southwards into Southwark, Lewisham, and beyond, creating a new transport corridor and improving connectivity.

1.4 The proposals have been developed by TfL over a number of years with, initially, plans focused around a two-phase process:

- Phase 1: a new tunnelled route from Elephant and Castle to Lewisham town centre, via New Cross Gate.
- Phase 2: extending the route beyond Lewisham town centre, with TfL's preferred option to convert the Hayes National Rail line via Catford Bridge.

1.5 In Southwark, the BLE would see the delivery of a new tube platform for the Bakerloo Line at Elephant and Castle (replacing the separate stations which currently exist for the Northern and Bakerloo Lines), and two new stations on the Old Kent Road. The potential for a third station at Bricklayers Arms is not currently part of TfL's consultation proposals but is a long-term aspiration of the of Southwark.

Figure 1.1 BLE Proposed Consultation Route, 2019



Source: TfL

1.6 In Lewisham, by creating interchanges at the existing stations of Lewisham town centre and New Cross Gate, the BLE would provide enhanced connectivity. Beyond Lewisham town centre, the BLE would serve existing stations at Catford Bridge, Ladywell and Lower Sydenham, should proposals to extend to Hayes be adopted.

1.7 In Bromley, a BLE extension to Hayes would serve existing stations at New Beckenham, Clock House, Elmers End, Eden Park, West Wickham and Hayes, plus an additional spur to Beckenham Junction.

The BLE: Background and Work to Date

1.8 TfL has been continually developing its plans to extend the Bakerloo Line, with an initial focus on providing a link to Lewisham town centre, but with a recognition that an extension beyond Lewisham town centre offers both wider accessibility and operational benefits.

1.9 Following consultations in 2014 and 2017, TfL defined the route to Lewisham town centre via the Old Kent Road and New Cross. During the most recent TfL consultation, at the end of 2019, the proposals to extend the route to Hayes were formally consulted on. This would see the extension of the Bakerloo Line to Ladywell, Catford Bridge and Lower Sydenham and on to stations in Bromley. This would require the use of existing overland rail tracks, which would be converted into London Underground usage.

1.10 Rather than phasing the construction, there is the potential option to deliver the extension to Hayes concurrently with the construction of the line to Lewisham town centre. This currently represents the preferred option being pursued by TfL.

1.11 The Bakerloo Line Extension would be delivered alongside the upgrade of the existing Bakerloo Line, incorporating modern signalling and rolling stock. This upgrade is a required prerequisite for the line extension. The BLE strengthens the business case for the existing line upgrade, by increasing demand along the southern section, between Elephant and Castle and central London.

1.12 TfL have demonstrated their commitment to the BLE scheme and are progressing to obtain necessary planning powers and funding required to take the project forward. The aspiration is for the Transport and Works Act order to be signed in 2022, with construction commencing in 2023 and the BLE opening in the early 2030s.

1.13 The BLE would deliver a significant change in both transport capacity and accessibility for the corridor running from Elephant and Castle, along the Old Kent Road to Lewisham town centre and beyond: current TfL projections are that BLE will provide additional capacity for 60,000 trips in the peak periods and reduce journey times between Lewisham and central London by up to 16 minutes.

1.14 In doing so, the BLE has the potential to unlock significant development and socio-economic benefits for southeast London. Opportunity Areas along the BLE have capacity for 47,500 new homes, many of which are supported by improved connectivity. More broadly, Opportunity Areas on the whole extended and upgraded Bakerloo line between Harrow and Hayes have capacity for over 100,000 new homes and 130,000 new jobs[1] alongside significant wider benefits including improved

Figure 1.2 Proposed BLE Route

Source: TfL

[1] Figures quoted on the Back the Bakerloo website run by Southwark and Lewisham

accessibility, reduced congestion, CO2 emissions and air pollution, and released capacity on other lines.

Strategic Support and Aspirations

1.15 Reflecting the transformational transport and economic benefits referenced above, the BLE enjoys strong strategic support within London.

1.16 The scheme is identified in TfL's 2019-2024 Business Plan as one of the most significant infrastructure projects for London. It is included as one of the key transport improvement projects which can support London's growth and help to create new homes and jobs. The project is also highlighted as "one of the best examples of how we [TfL] could improve connectivity, increase the capacity of the transport network and reduce journey times".

1.17 The BLE is also a major area of focus within the Mayor of London's draft New London Plan. This identifies the BLE Corridor as one of seven key growth corridors outside central London, with potential for 33,500 homes and 14,000 jobs across four opportunity areas – Old Kent Road, Lewisham town centre / Catford / New Cross, Deptford Creek / Greenwich Riverside and Bromley.

1.18 Both Lewisham and Southwark Councils are strongly supportive of the scheme. They have been campaigning for the BLE for a number of years in order to improve transport and connectivity in their boroughs, and to unlock the development of much-needed homes. As a result, both councils have been working closely with TfL and the Mayor of London to build a strong case for delivering the BLE and have been actively promoting the benefits and encouraging the local community to get involved through the 'Back the Bakerloo' website.

1.19 As well as supporting TfL's core proposals to extend the BLE to Lewisham town centre, both boroughs have additional aspirations for the delivery of the BLE in their area:

- **Bricklayers Arms Station:** Southwark is interested in a potential third new station along the Old Kent Road at Bricklayers Arms roundabout. They consider this to offer significant potential to increase housing densities and economic activity within the area, and to provide better connectivity for residents living at the north-west end of the Old Kent Road.
- **Hayes Line Extension:** Lewisham are actively promoting the extension of the line to Hayes (TfL's preferred option), as this would see the Bakerloo Line extend to the south of their borough into areas, such as Lower Sydenham, which are currently very poorly connected. Their aspiration is that the proposed further extension to Hayes is delivered as part of the core scheme to Lewisham town centre. This would result in a BLE from Elephant and Castle through to Hayes by 2031.

Route Specification

1.20 Whilst the route specification for BLE remains subject to on-going development, with a number of options still available, there is a general commitment for a tunnelled route from Elephant & Castle to Lewisham town centre, via New Cross Gate. TfL's preferred option encompasses a new Bakerloo Line platform at Elephant & Castle, altering the alignment, and two stations located along the Old Kent Road. Southwark remain interested in exploring the opportunity for a third station located at Bricklayers Arms.

1.21 The option for two or three stations between Elephant & Castle and New Cross Gate will be considered within this report.

1.22 Beyond Lewisham, whilst alternative options have been considered, TfL's preferred option, and Lewisham's preference, is for the route to join the exiting rail alignment to Hayes, via Catford. The focus of this assessment has been to consider the economic impact of the route via Lewisham town centre to Hayes.

1.23 For the purposes of this assessment a range of assumptions have been agreed with Lewisham and Southwark Councils, as well as TfL, in relation to the design and specification of the route and services that would operate. These are summarised within Figure 1.3.

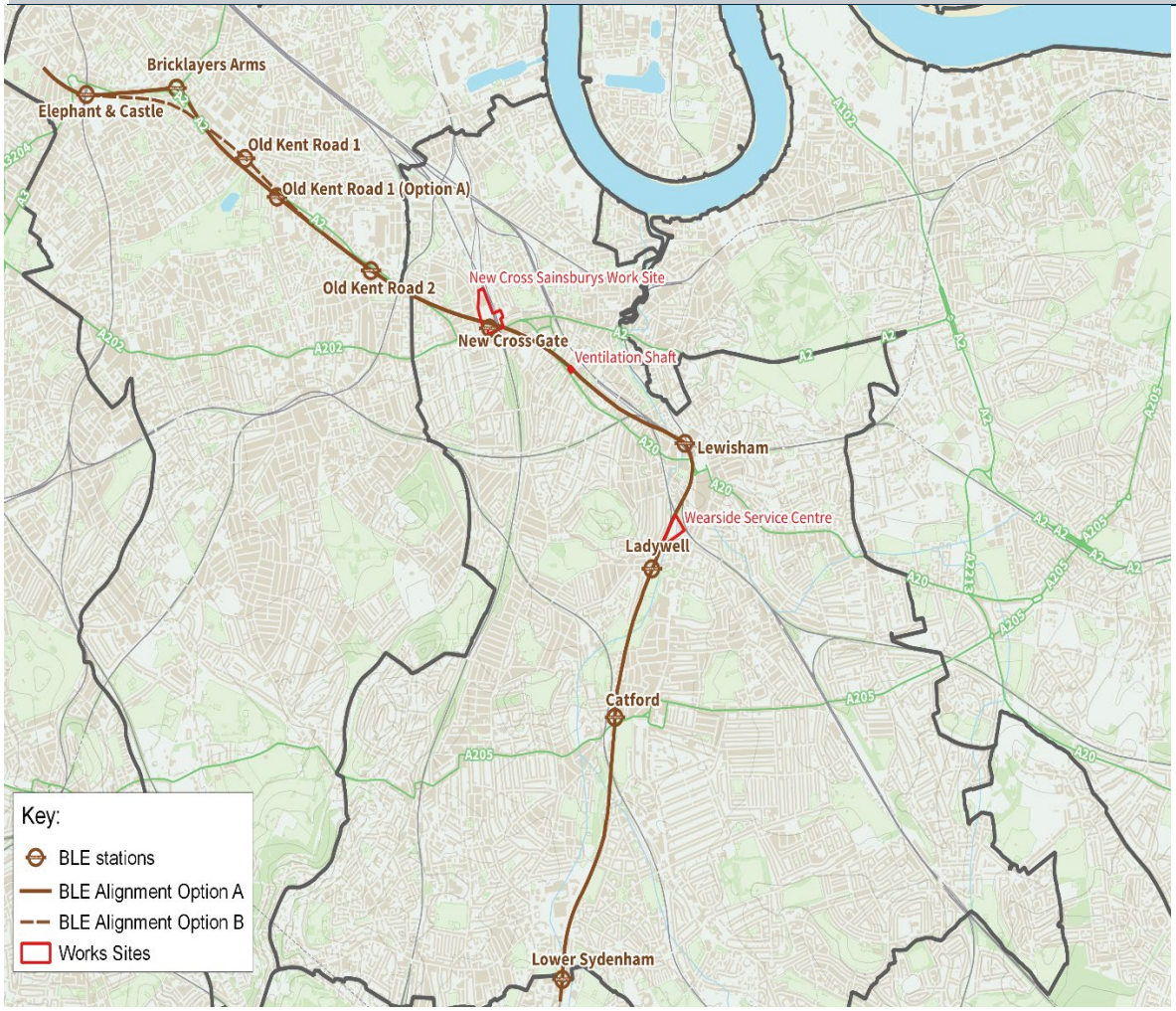
Figure 1.3 Route and Service Specification Assumptions

Classification	Description
Scheme delivery	Single phased delivery of Elephant & Castle to Hayes
	Scheme opening year 2023
	Conversion of national rail line to Hayes with 6-month closure*
	Bakerloo Line upgrade part of scheme
Station specifications	36 trains per hour to Lewisham town centre
	24 trains per hour to Lower Sydenham
Station Locations	***Elephant & Castle***: New Bakerloo Line platforms
	Old Kent Road Option A: Bricklayers Arms, OKR1 (Glengall Road site), OKR2 (Toys R Us site)
	Old Kent Road Option B: Wider E&C catchment, No Bricklayers Arms, OKR1 (Tesco site), OKR2 (Toys R Us site)
	New Cross Gate: new underground station on Sainsburys site with interchange with existing station
	Lewisham Town Centre: new underground station with direct interchange to existing station
	Ladywell, Catford Bridge: Existing station locations
	Lower Sydenham: Option to move this station north
Work Sites	Construction site location: ***Sainsburys New Cross Gate***
	Portal location: ***Wearside Service Centre, Wearside Road, Ladywell***
	Ventilation shaft location**: *Big Yellow Self Storage, Lewisham Way***
Other Considerations	Removal of flyover at Bricklayer Arms under OKR A option

Source: Hatch Regeneris. *please note that the extent of this closure is indicative, with a detailed programme developed during scheme development

1.24 Figure 1.4 presents a geographical representation of the assumed route alignment and key work sites.

Figure 1.4 Assumed Route Alignment and Key Work Sites



Source: Hatch Regeneris

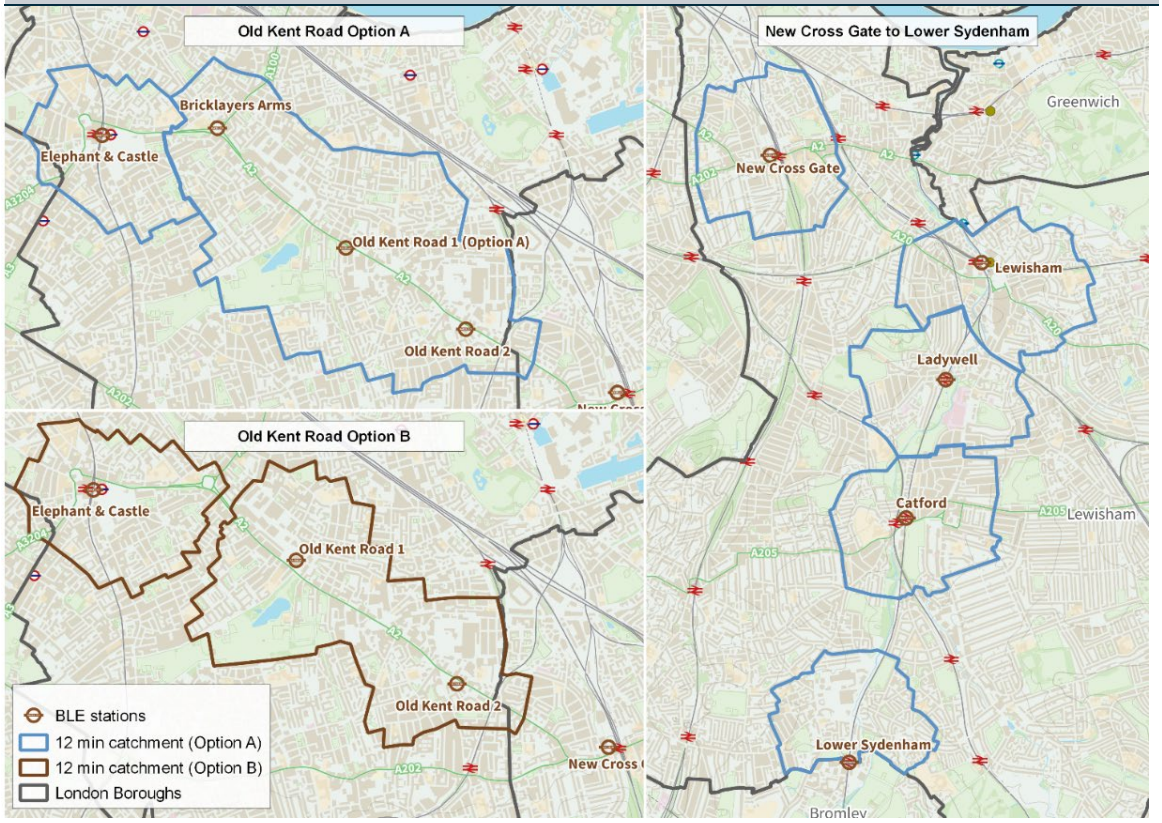
BLE Station Catchments

1.25 To undertake the impact analysis, catchment areas around each station have been identified (see Figure 1.5). These catchment areas define the reasonable area within which development and socio-economic changes could be wholly, or partly, attributed to the arrival of the BLE.

1.26 In line with the transport impact assessment literature, a 12-minute walking catchment (equivalent of 1km at 3mph walking speeds) has been used to define these catchments and mapped around each station using GIS travel mapping software. The catchments have then been adjusted for natural boundaries (such as rivers and railway lines), any overlaps with other nearby station catchments, and to fit with Southwark and Lewisham borough boundaries. In order to undertake baseline data analysis, a best-fit definition of statistical geographies (LSOAs, MSOAs and Wards) have been defined for each catchment.

1.27 The catchment areas for both potential Old Kent Road options (three station or two station) are both presented to demonstrate the potential variation.

Figure 1.5 Station Catchment Options (12-minute walking catchments)



Source: Hatch Regeneris. Contains OS data © Crown copyright and database right 2018s

Technical Work Undertaken to Date

Transport Planning

1.28 TfL have undertaken a range of assessment work for the BLE. This included initial route option development work – consulted upon in 2014 – followed by station and shaft locations assessment work – consulted upon in 2017.

1.29 The assessment work has included Railplan modelling to forecast the likely patronage levels and train loadings across the extension, as well as to determine direct travel benefits of the scheme. This forms a key input into the economic assessment work within this report and is summarised within Chapter 3 on the 'Potential Transport Impact of BLE'.

Research into Land Value and Funding Mechanisms

1.30 Alongside this technical work, TfL, Southwark and Lewisham have been examining the potential implications for land values across the corridor and implications of this for funding mechanisms.

1.31 The Land Value Uplift (LVU) research, undertaken by KPMG, examines potential LVU impact in the area associated with the delivery of the BLE. KPMG identified that LVU could be generated through the BLE as a result of improved accessibility and mobility, higher density or accelerated development, and productivity growth driven by improved transport linkages. The extent to which uplift is generated will depend on factors such as the proximity to the new/enhanced station, the nature of the project, local property scarcity, nearby patterns of land use and planning system parameters.

Study Area, Scope and Research Purpose

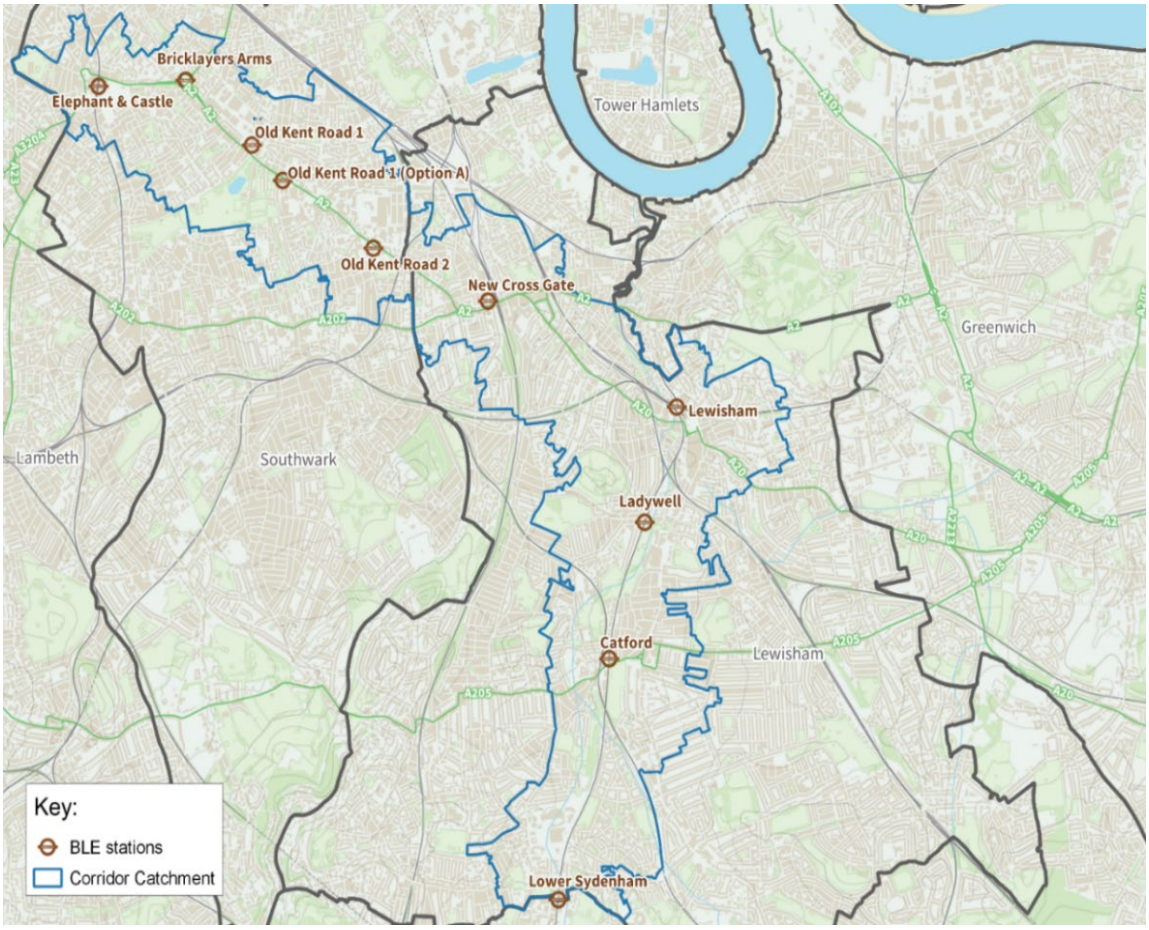
1.32 The focus of this study is on local and place-based impacts around the locations expected to benefit from a BLE station. This includes both the potential positive and negative impacts. It does not aim to assess macro scale benefits of the BLE for London and the UK as a whole. This, in part, has already been captured through TfL's assessment of the direct transport user benefits of the scheme.

1.33 Therefore, to undertake the assessment, a BLE 'Corridor' has been defined that encompasses the places along the route from Elephant and Castle through to Lower Sydenham (see Figure 1.6). This is based on an amalgamation of the 12-minute station catchment areas and is made up of LSOA best-fit geographies.

1.34 The Corridor encompasses a diverse part of London made up of distinct and very different places. Whilst the Old Kent Road is densely populated with lots of industrial spaces, places such as Lewisham and Catford have a much stronger town centre identity and retail offer. The population density towards Lower Sydenham is also much lower due to its outer London location.

1.35 While the research has not sought to explore the impacts of the BLE beyond Southwark and Lewisham, e.g. in the London Borough of Bromley, operational considerations relating to the wider geography of the BLE have been taken into account, where relevant.

Figure 1.6 Corridor Catchment Area



Source: Hatch Regeneris. Contains OS data © Crown copyright and database right 2018

1.36 The ultimate purpose of the research is to support the ongoing case-making work of Lewisham and Southwark for the BLE, and to also inform future strategy development regarding benefits realisation and to guide mitigation/minimisation of any negative effects.

1.37 The research has comprised two phases:

- Phase 1: Establishing the Corridor baseline and growth trajectory without the BLE: laying the basis for the local impact assessment, via consultation with TfL, Southwark and Lewisham, collation of existing information and evidence, and via analysis of available datasets and sources
- Phase 2: Impact assessment: application of the impact framework to assess and, where possible, quantify the local impacts of the BLE, taking into account a range of economic, social, environmental and financial / commercial factors.

1.38 This report sets out the findings from the research, as follows:

- The policy and local socio-economic context which frames the delivery of the BLE within Southwark and Lewisham's places – see Chapter 2
- Potential transport impacts of the BLE – see Chapter 3
- Based on the above, the agreed framework and methodology for assessing the impacts of the BLE – see Chapter 4
- The potential impacts of the construction process for Southwark and Lewisham – see Chapter 5
- The potential local operational impacts of the BLE for Southwark and Lewisham – see Chapters 6 and 7
- The areas where action will be needed to mitigate adverse impacts and to maximise benefits – see Chapter 8.

2. Local Area Context

2.1 This chapter examines the current socio-economic context of the BLE Corridor, examining the local policy and strategic context, before examining the statistical characteristics of the Corridor from a spatial perspective, and in terms of its population and economy.

2.2 The focus of the analysis in this chapter is on the character of the Corridor as a whole: more detailed analysis on the conditions within each of the BLE station locations is provided in Chapters 6 and 7.

Summary and Implications for the Impact Assessment

The research in this chapter establishes a baseline position from which to explore the potential impacts of the BLE. A summary of key findings is provided below.

Corridor Characteristics

The BLE Corridor cuts across a diverse part of south London, comprising areas which are highly residential, important industrial areas, town centres and commercial hubs. Reflecting the nature of the place, the Corridor has a diverse economy. Employment and business are largely focused around lower value activities; however, there are local concentrations of creative and higher value activities. Demand for commercial space is high, and the historic availability of relatively cheap commercial space and property has enabled the establishment of start-up economy and a large SME business base.

The demography and socio-economics of the BLE Corridor are similarly diverse, with significant local variation in the population across the area. The Corridor is densely populated in parts, particularly around the town centres, and some residential areas suffer from high levels of deprivation, and lower than average household incomes. However, residents in the middle of the Corridor experience much lower levels of deprivation than in other parts of the Corridor.

The Corridor faces significant challenges in the quality of its urban environment. The crime rate is well above the London average, and the north-west of the Corridor suffers from poor air quality and high levels of PM2.5, particularly around Elephant and Castle and along the Old Kent Road. Access to open and green space is also lower than the London average, and the quality of public realm and public space varies significantly across the Corridor, with particularly poor levels in locations such as Lower Sydenham, Catford and New Cross Gate.

Recent Performance and Change

The Corridor has evolved significantly in recent years, both in terms of the growth of the local population and the size and share of the economy.

Partly reflecting, and as a result of this growth, the availability and affordability of space across the Corridor is a key area of challenge. In particular, commercial rental values and house prices have rapidly increased in recent years from a relatively low starting point, making space increasingly difficult to afford for many local residents and businesses. As a result, there will need to be investment in delivering more, and affordable, commercial and residential spaces.

Headroom for Growth

The BLE Corridor is recognised as a regionally significant area for development and growth. The population is projected to grow much faster than the London rate in the coming 10-12 years and, as a result, significant investment in, and delivery of, new housing will be required to meet the growing demand, as well as the creation of new jobs and employment opportunities.

The draft New London Plan sets a ten-year housing target for Southwark and Lewisham of 25,540 and 21,170 respectively. Capacity testing by Southwark and Lewisham Councils suggests that, even without the BLE, the BLE Corridor has potential to accommodate a significant amount of growth: 9,500 and 17,300 units respectively. The potential for BLE to delivery additional growth on top of this, by enhancing accessibility and increasing investor interest, is the focus of the impact assessment in Chapters 6 and 7.

Strategic Context

2.3 There are a number of key policy and strategy documents which frame the socio-economic context in both Lewisham and Southwark.

Mayoral 'Good Growth' Strategies

2.4 At the London level, the Mayor has established a clear agenda around the principle of 'good growth' which is focused around ensuring that future growth in London is both equitable and sustainable. Key plans and strategies of relevance include:

- The New London Plan:
  - Socially and economically inclusive growth underpins all aspects of the London Plan. The focus is on the wider implications of growth, where that growth is taking place and, crucially, where it currently is not.
  - The London plan seeks to plan for growth on the basis of its potential to improve the health and quality of life of all Londoners, while also reducing inequalities and making the city a better place to live, work and visit.
  - The plan outlines how land in London will be best used to ensure that growth is inclusive and accessible. This will be done by maximising efficiency on current and future public transport and reaching the Mayor's target for 80% of all journeys to be made by walking, cycling and public transport. The London Plan sets out its explicit support for a Bakerloo Line Extension and the role this could play in unlocking growth in the south east.
- The Mayor's Economic Development Strategy:
  - The development strategy similarly places inclusive growth at its core. With a focus on world class education, opportunities for all, lower costs of living, fair pay and good employment practices, high quality health and reduced levels of poverty in inclusive and safe communities.
  - The strategy focus is also on how the conditions for growth can satisfy these ambitions, these include: ensuring there's enough space for business and work by balancing competing demand for land use, resolving transport

capacity issues and encouraging more people to use public transport, walk or cycle. Major utility and digital infrastructure investment must keep pace with the growth of London's population. Skills attainment must be inclusive and life long, this will contribute to the development of greater enterprise and entrepreneurship in the capital.

- Skills for Londoners:
  - Key challenges and opportunities in relation to the skills agenda are outlined in the Skills for Londoners strategy, which focuses on post-16 skills. Priorities include:

  1) empowering Londoners to access the education and skills to participate in society and progress in education and work
  2) Ensure that the needs of the London economy and employers are met in the future by closing skills gaps.
  3) Deliver a strategic city-wide technical skills and adult education offer.

- The Mayor's Transport Strategy:
  - The transport strategy seeks to enhance the usability of present and future transport capabilities in the capital.
  - The strategy states that, "London's streets should be for active travel and social interaction, but too often they are places for cars not people." There is ultimately a desire to lessen the use of private vehicles and encourage use of other transport methods. The strategy makes a connection between good public transport and high quality of life.
  - Proposal 85 of the strategy sets out plans for a Bakerloo Line extension in order to improve transport connectivity and put south east London on the tube map.

The London Borough of Southwark

2.5 The Southwark Local Plan sets out the overall aspirations of the borough and ensures planning and development in the borough does not negatively impact the communities and neighbourhoods in Southwark.

2.6 The Plan identifies the key development opportunities which will help the borough to achieve its homes and jobs targets, including around Elephant and Castle and along the Old Kent Road. The delivery of these schemes is founded on the need for transport infrastructure improvements across the borough in order to increase capacity and unlock development. Extending the Bakerloo Line is one of the most significant transport improvement projects in Southwark and underpins much of the development along the Old Kent Road.

2.7 **Southwark Economic Wellbeing Strategy 2017-2022** outlines four key socio-economic ambitions for the borough. These are:

1) Ensuring there is a job opportunity available for every Southwark resident who wants to work.
2) Encouraging businesses to thrive and prosper.

3) Enable and develop thriving town centres for residents and visitors to spend time in and enjoy.

4) Promote fair employment, financial inclusions and family friendly workspaces.

2.8 On transport and infrastructure, the Southwark Economic Wellbeing Strategy acknowledges that public transport plays a significant role in enabling growth. The Bakerloo Line Extension is identified as a capacity increasing project for the borough and therefore enabling increased rates of growth.

2.9 More locally focused, the **Area Action Plan for Old Kent Road**, adopted in 2017, sets out how development in the opportunity area will look over the next 20 years. The ambitious plans for the evolution of the area, including significant housing delivery, are predicated upon the commitment to deliver the BLE. Southwark council, alongside TfL and the GLA have agreed that, due to capacity constraints, 10,500 of the planned 20,000 new homes in the area will only be granted permission if the BLE comes forward.

2.10 The Area Action plan for Old Kent Road describes the Bakerloo line extension as a "game changer for the area." This is based on the expectation that the extension will enable substantial growth in housing and jobs and impact for the wider London economy as well as for new and existing business in Old Kent Road.

2.11 Looking at the socio-economic intentions outlined in the Old Kent Road Area Action Plan, a core aspiration is to encourage and strengthen the vibrant business community and promote innovative activity in these businesses.

The London Borough of Lewisham

2.12 Lewisham are currently developing their Local Plan, which will outline how the planning strategy for growth in the borough. This will cover the delivery of new housing, and housing-related infrastructure, from 2018-2033.

2.13 A vision for borough was established in 2008 in **Lewisham's Sustainable Community Strategy 2008-2020**. This set out the key challenges that the borough was expected to face over the period covered in the strategy. Priorities in the plan include increasing ambition in the community, making the community safer and empowering local people to take active roles within Lewisham communities. The strategy also seeks to make Lewisham a clean, green and liveable place with a healthy active population who care able to participate in the community that is dynamic and prosperous.

2.14 The Lewisham **Business Growth Strategy 2013-2023** aims to boost Lewisham's contribution to the London economy. The strategy aims to achieve this by enhancing the ability of new and existing businesses, capitalising on major physical regeneration to create the right environment for business growth and diversifying and expanding the Lewisham economy by developing creativity.

2.15 The Council's **New Cross Area Framework** worked with local businesses and residents to develop a vision of how New Cross should evolve as a place with the Bakerloo line extension, guiding future regeneration projects and development management under the themes of:

- A Lively place
- A Creative Place
- Distinctive local places
- An Equitable place
- A Connected Place

2.16 The framework also included a Station Opportunity Study which aims to guide the development of the future New Cross Gate station, ensuring that it maximises the benefit in terms of strengthening New Cross' character, connectivity to the broader area and quality of place. The Station Opportunity Study has been developed into a supplementary planning document (SPD), with a view to ensuring that future development fully reflects the scale of the opportunity that the BLE brings. This SPD was published in November 2019 for consultation.

2.17 In addition, Lewisham's **Direction of Travel** Document demonstrates to developers and the planning community the Council's commitment to securing the Bakerloo line extension, and its willingness to maximise the growth and development opportunities along the corridor. While it does not set any new planning policy, it does seek to demonstrate that the Council's current planning policy (which pre-dates the announcement of the BLE) is compatible with this commitment.

Current Socio-Economic Context

2.18 This section presents the socio-economic baseline of the catchment area around the BLE.

2.19 The station catchment areas and 'Corridor', made up of LSOA geographies and defined in Chapter 1, have been used to conduct the baseline analysis.

2.20 To understand the characteristics of the BLE Corridor, both social and economic datasets have been used focusing on the following themes:

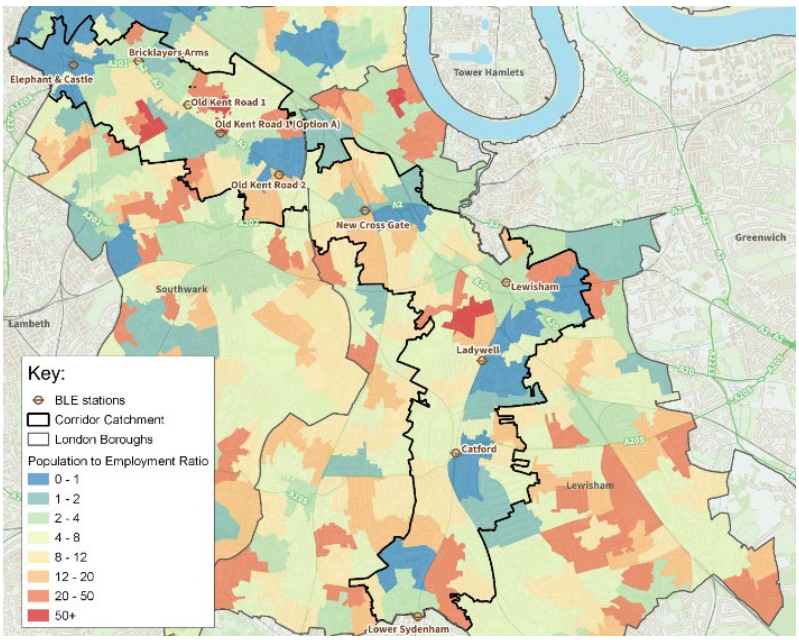
1. **Place and Space** - commercial space, housing market, quality of place, environment
2. **People** - population, demography, labour market conditions, housing access, prosperity and community resilience
3. **Economy** - jobs, sectors, business and enterprise.
4. **Future Growth Trajectory** – the capacity across the Corridor for residential and commercial growth.

1. Place and Space

2.21 The BLE Corridor is very diverse in character.

2.22 While predominantly residential in nature, the area contains a number of key economic centres and hubs (identified in blue in Figure 2.1 as locations where there are more jobs than residents).

Figure 2.1 Ratio of Population to Employment, 2017



Key economic hubs:

- Elephant and Castle – designated as a district town centre, with major regeneration underway increasing and revitalising the offer
- Old Kent Road – undesignated as a town centre, but a hub for convenience and out of town retail and also an important industrial location
- New Cross – designated as a district town centre
- Lewisham (including Ladywell) – designated as a major town centre
- Catford – designated as a major town centre
- Sydenham – designated as a district town centre.

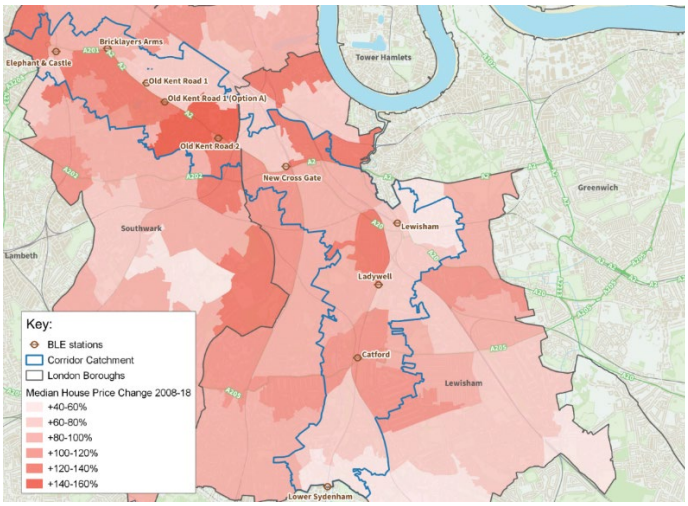
Source: ONS 2017, BRES 2017. Contains OS data © Crown copyright and database right 2018

The Local Housing Market

2.23 Across the BLE Corridor, housing stock currently comprises around 60,900 units.

2.24 The Corridor's housing market is predominantly geared towards flats and maisonettes. Over two thirds housing is 'flat/maisonette', which is lower than the Inner London average but higher than the London average. There is also a slightly higher proportion of houses (26%) than typically seen across Inner London (24%). This could be due to the low rise, suburban character of the areas to the south of the Corridor, such as Lower Sydenham and Ladywell.

Figure 2.2 Median House Price Change, 2008-18



Source: ONS 2008, 2018. Contains OS data © Crown copyright and database right 2018

2.25 Across the BLE Corridor, the average house price is around £456,000, with a rapid rate of growth in values over the past decade. The average increase in house prices was +97% between 2008 and 2018, and +79% in more recent years between 2013-18. Longer term changes are mapped on Figure 2.2 and show a significant increase along the Old Kent Road.

2.26 The house price affordability ratio is used to indicate the gap between resident's earnings and house prices. This gives an indication of the likelihood for residents to be able to afford to buy a house in the area in which they live. Data shows that house prices are around 15 times the annual earnings of residents in Southwark, which is above the London average

of 13 times (see Figure 2.3). In Lewisham, where average house prices are significantly lower than the Southwark and London, the affordability ratio is slightly lower (12). However, given how much cheaper the houses are in Lewisham, the affordability ratio is still at a similar level to London due to the lower average annual earnings of residents.

Figure 2.3 Housing Affordability, 2018

	Lewisham	Southwark	London
House price affordability ratio (Ratio of median house price to median gross annual residence-based earnings)	12.26	15.19	13.09

Source: ONS, 2018

2.27 Affordability has weakened considerably over the past decade (see Figure 2.4). Since 2008, house prices relative to income have increased by 69% in Southwark: this meant residents had to find an extra 6.2 times their income to afford a house in 2018 compared to 2008. Affordability challenges have also become more pronounced in Lewisham over the past five years, where house price rises relative to income have been +59%, compared to +36% across London.

Figure 2.4 Changes to Housing Affordability over the last 5 and 10 years

	Lewisham		Southwark		London	
	2008-18	2013-18	2008-18	2013-18	2008-18	2013-18
House price increases relative to median income	+52%	+59%	+69%	+50%	+54%	+36%

Source: ONS, 2018

2.28 Partly linked to affordability, but also representative of a series of wider issues, both Southwark and Lewisham are characterised by high levels of demand for social housing. In 2018, there were 6,800 and 9,900 people on the waiting lists of the two council's respectively.

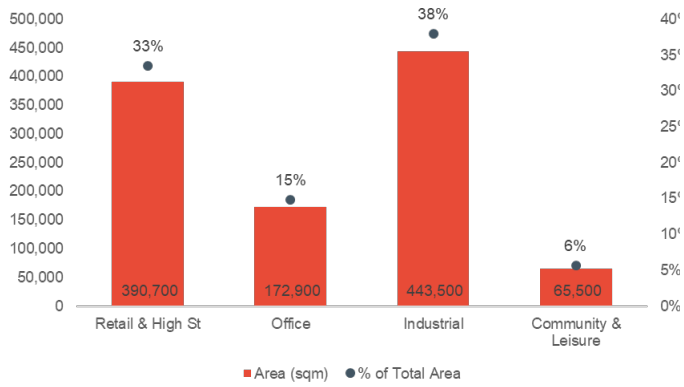
Commercial Space Across the Corridor

2.29 Data from the Valuation Office Agency (VOA) shows the breakdown of size and location of space in the Corridor (see Figure 2.5). There is a significant amount of industrial space (443,500m²) making up 38% of total space, followed by retail & high street uses (33%), office (15%) and then community & leisure (6%).

2.30 This suggests the BLE Corridor is far more reliant on industrial and retail uses than the London average, as across London industrial and retail space comprise 31% and 25%, respectively. On the other hand, office space in London is as high as 40%.

2.31 The maps below (see Figures 2.6-2.9) show the spatial distribution of the commercial stock. The office and high street uses tend to concentrate along high streets and in town centres in the Corridor, whilst community & leisure uses are more spread out.

Figure 2.5 Summary of Commercial Stock in the BLE Corridor



Source: VOA 2018, Hatch Regeneris Analysis

2.32 Industrial stock is also spread out across the Corridor but tends to concentrate in specific locations. This is likely to be the case because the 'industrial' classification includes light industrial spaces (B1c use classes), which are more commonly found alongside town centre and high street uses than traditional industrial spaces. In addition, the Corridor is also home to a number of industrial parks, which can be seen on the map towards the end of the Old Kent Road, north of Ladywell and to the south east of Catford.

Catford town centre

Figure 2.6 Retail & High Street Uses

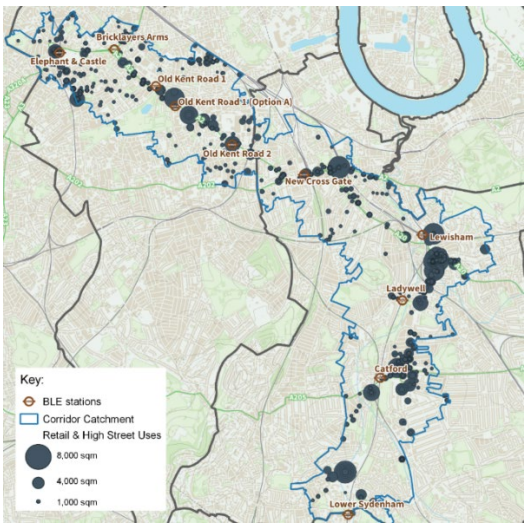


Figure 2.7 Office Uses

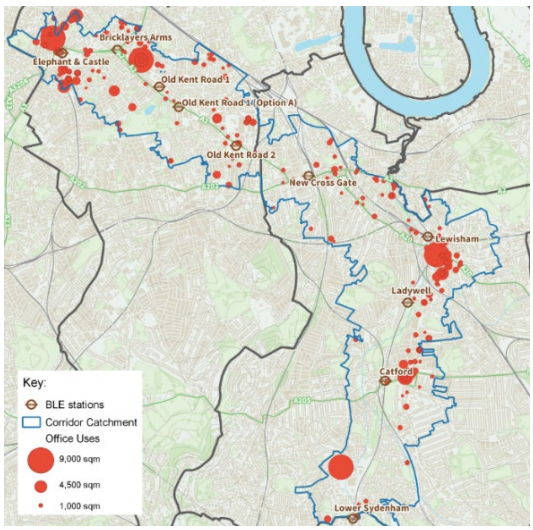


Figure 2.8 Community & Leisure Uses

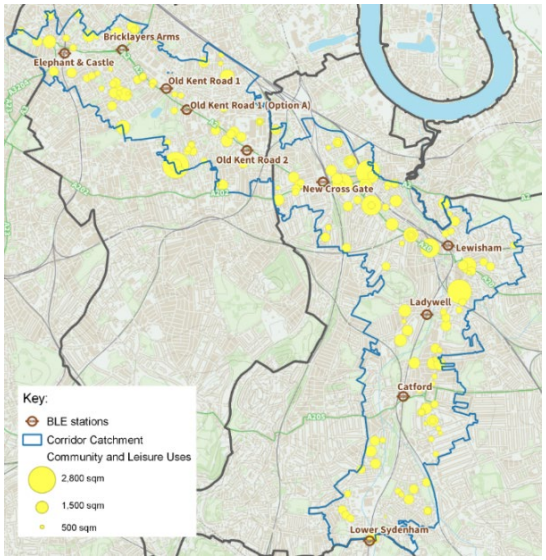
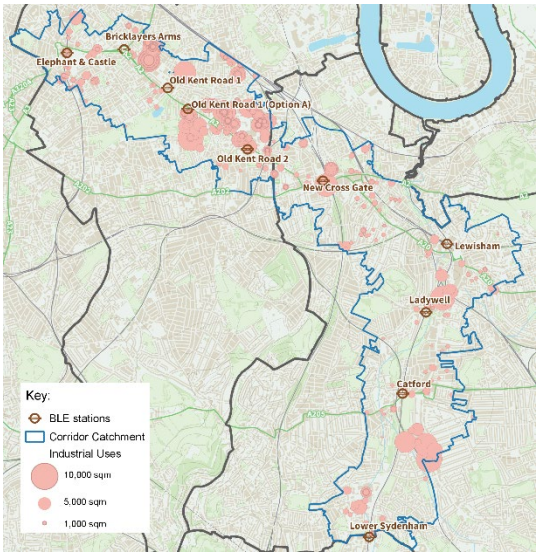


Figure 2.9 Industrial Uses



Source: VOA 2018, Hatch Regeneris Analysis. Contains OS data © Crown copyright and database right 2018

2.33 The commercial market is performing well in the Corridor. There are low vacancy rates across retail, office and industrial spaces (see Figure 2.10), suggesting there is strong demand for commercial space in the area. Despite office and retail rental values currently sitting below London averages, industrial rental values (£15 psf) are higher than seen across London (£12 psf). This is likely to be a result of high demand and low vacancy rates, exacerbated by a trend of declining industrial stock across the rest of London.

2.34 Data from CoStar shows that strong commercial market performance has been a trend in the Corridor over the last five years (see Figures 2.11 and 2.12). Since 2013, rental values have been increasing at a faster rate than the London average for retail, office and industrial spaces. In particular, there has been dramatic growth in office rental values (+72%) versus London (+40%). Analysis of vacancy rate changes also shows strong commercial market performance, with vacancy rates decreasing across industrial, office and retail spaces.

2.35 The very low industrial vacancy rates seen in the Corridor today are as a result of a 5.8 percentage point decrease since 2013. This is well above the office and retail decreases, and the industrial London average decrease.

2.36 A combination of both rapidly rising rents and decreasing vacancy rates in the Corridor suggests there has been high demand for commercial space in recent years, but a trajectory of decreasing availability of affordable space.

Figure 2.10 Retail, Office and Industrial Rental Values and Vacancy Rates, 2018

	Retail		Office		Industrial	
	Rental Value (per sq. Ft)	Vacancy Rate	Rental Value (per sq. Ft)	Vacancy Rate	Rental Value (per sq. Ft)	Vacancy Rate
BLE Corridor	£27	11%*	£27	1.0%	£15	0.5%
London	£40	6.1%	£50	5.5%	£12	3.2%

Source: CoStar, 2018, GLA Town Centre Health Check, 2018
*Made up of the town centres in the BLE Corridor that are included in the London Town Centre Health Check. Elephant and Castle has an unusually high vacancy rate which brings the average up. Excluding Elephant and Castle, the BLE Corridor vacancy rate is 5%.

Figure 2.11 Percentage Change in Rental Values, 2013-18

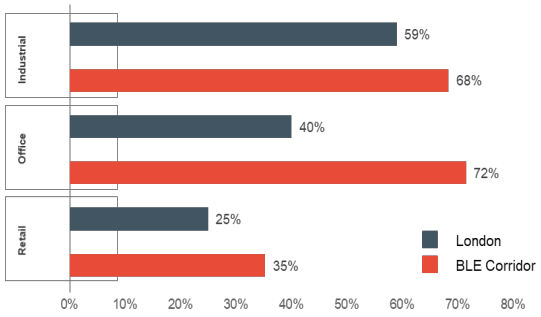
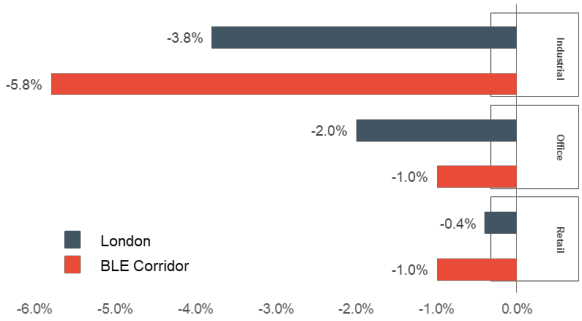


Figure 2.12 % Point Change in Vacancy rates 2013-18



Source: CoStar 2018, 2013

The Urban Environment

2.37 Based on the Healthy Streets assessment criteria implemented by the Mayor of London and TfL, the quality of public realm and place across the BLE Corridor has been assessed[2] based on 10 indicators (see table below). Each indicator is scored as a percentage out of 100, with high numbers showing a good performance and low numbers showing a below standard performance. Generally, a score above 60-70 is deemed as good[3].

2.38 The quality of places within the Corridor varies significantly, as shown in the table below. Lewisham town centre performed the best, with an overall score of 60. This was influenced by the prevalence of things to see and do in the town centre, and good infrastructure for pedestrians. On the other hand, Catford Bridge and Lower Sydenham were the worst

[2] Though assessment is based on the ten criteria found in the Healthy Streets check for designers implemented by the Mayor of London and Transport for London, full technical assessments have not been undertaken.

[3] Given the strategic nature of the transport corridors in the immediate vicinity of the proposed BLE station locations, a Healthy Streets score of 60+ could be considered good when compared to other locations across London.

performing, with particularly poor scores for traffic speed, lack of space for pedestrians and high collision risk for cycling.

2.39 Across the Corridor, all the catchments achieved at least one 'zero score'. This indicates a 'known road danger' and if achieved on a proposed scheme would cause that design to be invalidated in Healthy Streets terms. Lower Sydenham had 6 'zero' scores, the highest in the Corridor. All the catchments also struggled with high volumes of traffic and congestion, suggesting investment in traffic calming measures and other forms of transport is needed.

2.40 The following tables detail the Healthy Streets Scores of each catchment area and an example is provided of the Lewisham town centre assessment. Please refer to Appendix C 'Quality of Place Appraisal' for the full station-by-station assessment.

Healthy Streets Assessment for Corridor Centres	
	Healthy Streets Score
Old Kent Road	50 (an average score for the 3 stations)
New Cross Gate	51
Lewisham Town Centre	60
Ladywell	51
Catford Bridge	49
Lower Sydenham	42
Heathy Streets Indicators: 1. Attracts pedestrians from all walks of life; 2. Roads are easy to cross; 3. There's plenty of shade and shelter; 4. There are places to stop and rest; 5. Not too noisy; 6. People choose to walk, cycle and use public transport; 7. People feel safe; 8. There are things to see and do; 9. People feel relaxed; 10. Clean air.	

Source: We Made That

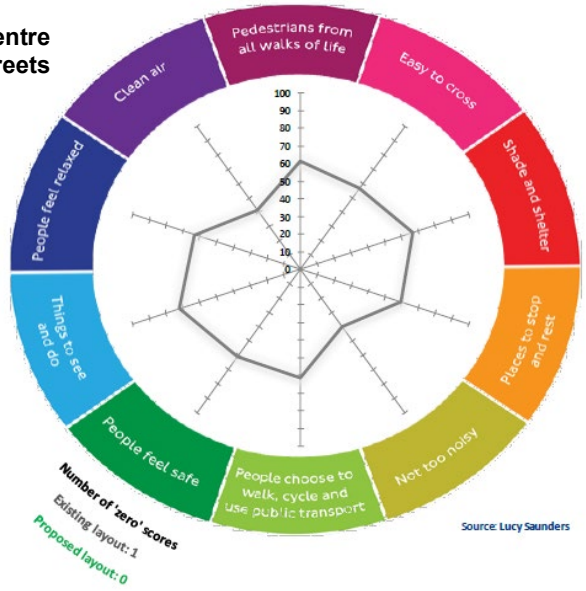
Lewisham station

Station by Station Healthy Streets Assessment Overview

	Pedestrians from all walks of life	Easy to cross	Shade and shelter	Places to stop and rest	Not too noisy	People choose to walk, cycle and use public transport	People feel safe	Things to see and do	People feel relaxed	Clean air	Overall Healthy Streets Check
Old Kent Road[1]	50	51	50	49	44	50	52	50	50	50	**50**
Bricklayers Arms	58	60	50	60	53	58	64	50	59	67	**59**
Old Kent Road 1	49	57	50	47	40	49	50	58	49	42	**49**
Old Kent Road 2	42	37	50	40	40	42	42	42	42	42	**42**
New Cross Gate	52	57	33	33	40	52	50	56	53	42	**51**
Lewisham Town Centre	61	57	67	60	40	61	61	72	63	42	**60**
Ladywell	51	53	50	53	47	51	48	50	51	58	**51**
Catford Bridge	49	53	50	40	40	49	48	56	51	42	**49**
Lower Sydenham	41	47	33	33	47	41	43	42	42	50	**42**

Source: We Made That
[1]Average scores for three Stations

Lewisham Town Centre Station Healthy Streets Assessment



Air Quality

2.41 Poor air quality is a major challenge currently affecting London, and air quality tends to be worse in more central parts of the city and along main arterial roads. As shown by Figure 2.13, the north west of the BLE Corridor around Elephant & Castle and along the Old Kent Road particularly suffer from high levels of PM2.5 in the atmosphere. However, PM2.5 levels tend to decrease along the Corridor and southwards towards Lower Sydenham

Open Space

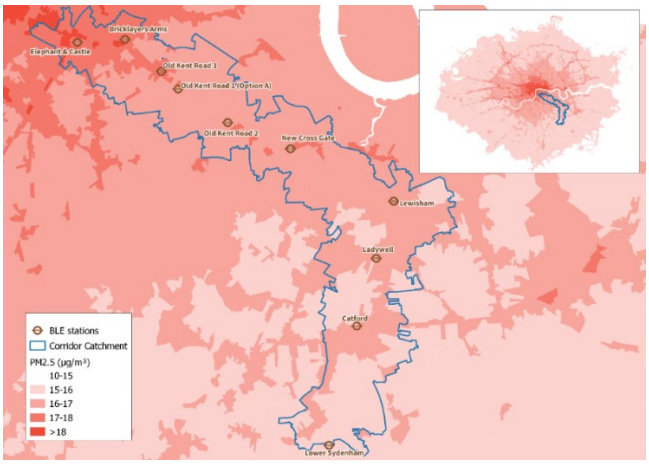
2.42 On average, 32% of households in the BLE Corridor have access to at least some form of open space (including open space, local parks, district parks, metropolitan parks and regional parks). This is low compared to an average of 41% across London.

2.43 As shown Figure 2.14, a significant proportion of wards within the Corridor have below the London average access to larger open spaces, such as regional (93%) and metropolitan (71%) parks. 64% of wards have below the London average level of access to any open space.

Crime

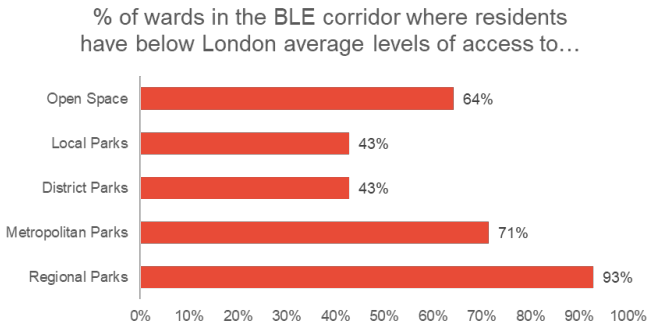
2.44 Crime rates across the Corridor are comparatively high. There were 55,800 recorded crimes in the Corridor over the last two years (March 2017- February 2019). This was 3% of all recorded crime in London and is a crime rate of 309 per 1,000 population, versus 187 per 1,000 population in London. Over half of all crimes in the Corridor were theft or violence against the person.

Figure 2.13 Levels of PM2.5 in the Atmosphere (µg/m³)



Source: GLA 2013

Figure 2.14 Access to Open Space, 2018



Source: GLA 2018

Place and Space: Questions for the Impact Assessment

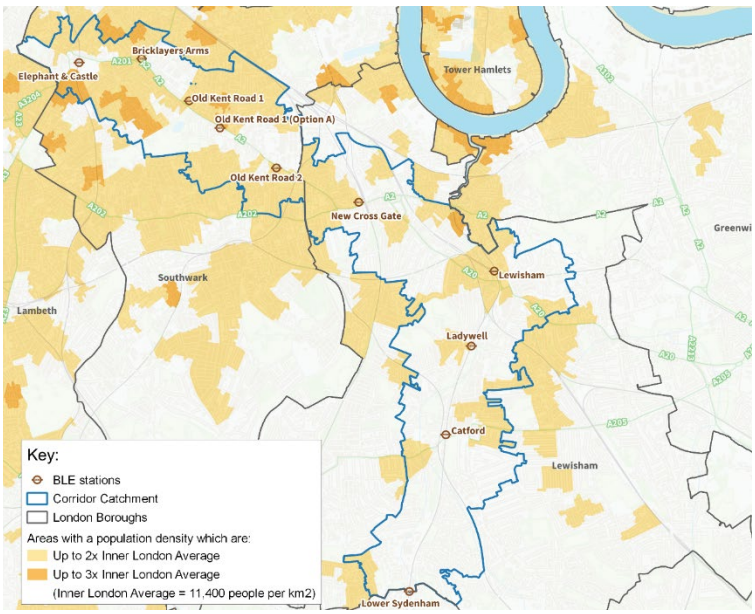
- *Residential space:* what impact will the BLE have on the supply of housing across the Corridor, and how will this impact on affordability levels?
- *Commercial space:* will the BLE help to enhance the supply and quality of commercial space across the Corridor?
- *Vitality of Place:* what impact will the BLE have on town centre vitality across the area?
- *Environment:* What impact will the BLE have on levels of local congestion and air quality? What how will it affect the quality of public and open space areas the area?

2. People and Community

2.45 The BLE Corridor is currently home to around **180,400 people,** which is approximately 2% of London's total population. The population in the Corridor grew by +6% between 2012-17, in line with the London average.

2.46 Average population density is around 13,200 people per km², which is well above the Inner London average (11,400 people per km²). As shown in Figure 2.15, population density varies across the Corridor. In the north-west, many areas are 2 or 3 times the Inner London average, whereas southern parts of the Corridor around Lower Sydenham fall well below.

Figure 2.15 Population Density vs Inner London

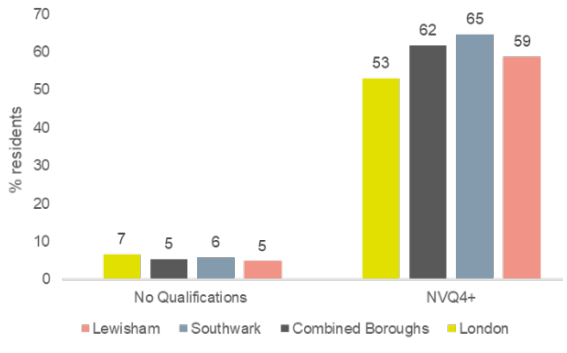


Source: GLA 2018. Contains OS data © Crown copyright and database right 2018

Economic Participation and Labour Market

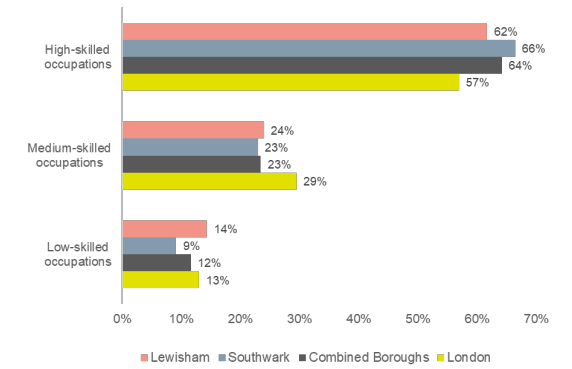
2.47 Figures from the Annual Population Survey give an insight on the residents living in an area. As Figures 2.16 and 2.17 show, those living in the Lewisham and Southwark tend to be more highly skilled than the London average, and are working in higher-skilled occupations. In particular, Southwark has a higher proportion of residents with the highest level of qualifications and in high-skilled occupations, compared to Lewisham and London.

Figure 2.16 Qualification Levels of Residents, 2018



Source: APS 2018

Figure 2.17 Occupational Profile of Residents, 2018



Source: APS 2018

2.48 Compared to London levels, residents in Southwark and Lewisham are also more economically active, with greater proportions of people in employment compared to London. This is a result of significant growth in economic activity rates and employment levels in recent years. In particular, Southwark has seen growth in economic activity (+20%) and employment (+27%) over twice the rate in London.

2.49 Both boroughs have also seen stronger declines in unemployment rates, especially youth and female unemployment rates in Lewisham, than London. This suggests that over the last five years the area has made significant progress in improving the labour market participation of its residents in order to reach London levels.

2.50 However, whilst the APS data presents a positive picture for the two boroughs, it is worth highlighting that these figures may not be capturing more local level variation along the BLE Corridor. For example, claimant count data suggests that in April 2019, the BLE Corridor had just over 5,000 claimants which is around 4% of Corridor's 16-64 population. This is relatively high compared to an average of 2.7% across London, and this figure has been growing significantly in recent years (+4% between 2012-17) compared to a decrease across London (-1%). Therefore, it may be likely that the Corridor has higher levels of unemployment and economic inactivity that shown in the borough level data.

Figure 2.18 Labour Market Participation 2018 and Change 2013-2018

	Lewisham			Southwark			London		
	2018	% of total 2018	% change 2013-2018	2018	% of total 2018	% change 2013-2018	2018	% of total 2018	% change 2013-2018
Economic Activity Rate (16-64)	174,500	83%	+11%	192,100	83%	+20%	4,713,200	78%	+8%
In Employment	166,700	79%	+19%	179,800	77%	+27%	4,475,000	74%	+13%
Unemployment Rate (16-64)	7,900	5%	-54%	12,300	6%	-31%	238,200	5%	-39%
Youth Unemployment Rate (16-24)	2,000	13%	-80%	3,200	15%	-30%	71,400	15%	-44%
Male Unemployment Rate (16-64)	4,400	5%	-48%	6,300	6%	-38%	125,000	5%	-39%
Female Unemployment Rate (16-64)	3,400	4%	-60%	6,000	7%	-21%	113,200	5%	-38%

Source: APS 2018

Income, Prosperity and Wellbeing

Income

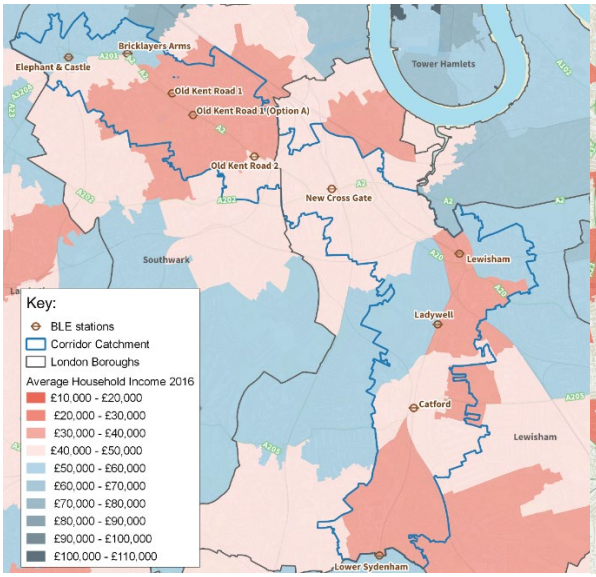
2.51 In 2016, average annual household income across the Corridor was around £43,800, well below the London average of £51,400. Figure 2.19 shows how annual household income varies significantly across the Corridor, with pockets of very low average annual household income levels along the Old Kent Road and in the south around Catford and Lower Sydenham.

Prosperity

2.52 Partly reflecting household income (alongside a range of other measures), the BLE Corridor is also characterised by with high levels of deprivation. According to data from the Index of Multiple Deprivation, 40% of LSOAs in the Corridor are in the top 20% most deprived nationally, versus only 16% across London. Figure 2.20 shows that much of this deprivation is concentrated to the north-east of the Corridor along the Old Kent Road, and to the south around Catford and Ladywell on the eastern side of the railway tracks.

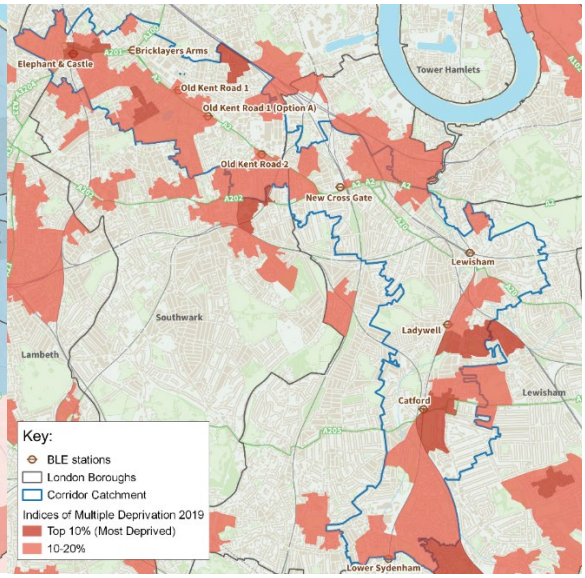
2.53 Free School Meals data is also commonly used as a proxy for socio-economic deprivation. In the Corridor, 6,100 pupils are eligible for free school meals, which is 23% of all pupils in the area. This is compared to a London average of 18% pupil eligibility for FSM.

Figure 2.19 Average Household Income, 2016



Source: ONS 2016. Contains OS data © Crown copyright and database right 2018

Figure 2.20 Indices of Multiple Deprivation



Source: MHCLG 2019. Contains OS data © Crown copyright and database right 2018

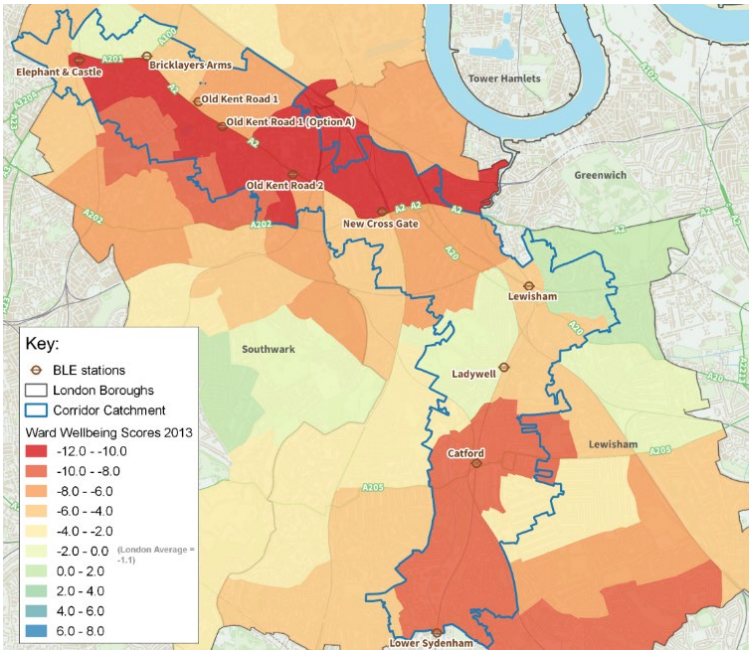
Wellbeing

2.54 Ward Wellbeing Scores, published by the Greater London Authority, use 11 measures, including crime levels, unemployment, life expectancy and happiness to determine the wellbeing of residents across London. The higher the score, the greater the wellbeing.

2.55 Figure 2.21 shows that almost all of the Corridor is below the London average wellbeing score (-1.1), with some areas of the Old Kent Road and New Cross Gate struggling with scores as low as -11. These areas particularly struggle with unemployment, high levels of crime and high numbers of children in out-of-work families.

2.56 However, spatial analysis of the wellbeing scores and IMD data highlights a band across the middle Corridor from Ladywell to Lewisham which has different characteristics to the rest of the Corridor. Parts of this area have lower levels deprivation, higher than London average wellbeing scores, and higher house prices compared to the rest of the Corridor.

Figure 2.21 Ward Wellbeing Scores 2013



Source: GLA 2013. Contains OS data © Crown copyright and database right 2018

Questions for the Impact Assessment

- *Labour Market:* can local investment linked to the BLE help to encourage greater economic participation and reduce state dependency?
- *Deprivation and wellbeing:* can local investment linked to the BLE help to reduce deprivation and enhance levels of social and community wellbeing?

3. Economy

2.57 There are currently estimated to be 66,800 people employed in the Corridor in 7,800 businesses. This means the Corridor is home to 1.3% of total employment in London and 1.5% of London's business base.

Economic Growth

2.58 The Corridor's economy has been performing well and has experienced growth in recent years. Between 2012 and 2017 there was a 10% increase in employment, resulting in the creation of around 5,800 more jobs. However, this rate of growth was lower than seen in London for the same period (+15%), and therefore there is potential for further employment increases going forward.

2.59 On the other hand, the business base has experienced strong growth, increasing by 2,300 businesses (+43%), which is a stronger growth rate than the London average (+36%).

Figure 2.22 Employment and Business Change

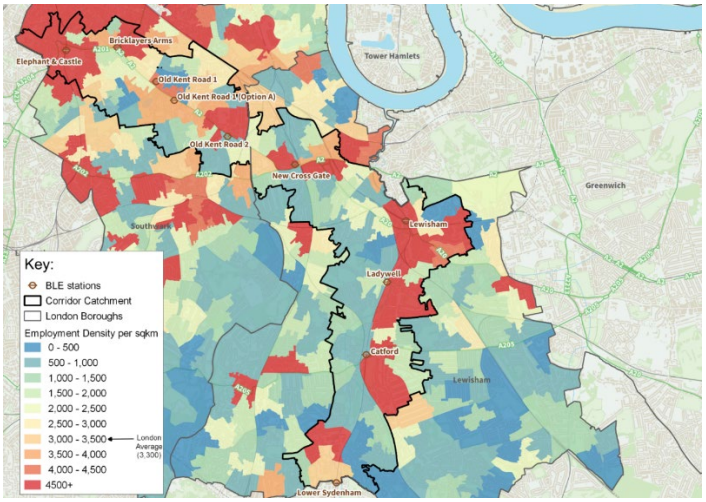
	Employment		Businesses	
	No (2017)	% change 2012-17	No (2018)	% change 2013-18
BLE Corridor	66,770	+10%	7,810	+43%
London	5,268,000	+15%	506,180	+36%

Source: BRES 2012, 2017; UK Business Count 2013, 2018

Economic Density

2.60 Business density in the Corridor (372 businesses per km²) is in line with London average (322 businesses per km²), but well below the Inner London average of 836 business per km². This is partly due to the nature of places in the Corridor being more residential, as well as the loss of employment space to residential schemes in recent years.

Figure 2.23 Employment Density per km²



Source: BRES 2017. Contains OS data © Crown copyright and database right 2018

2.61 Employment density in the Corridor varies significantly at the local scale (see Figure 2.23). The average density of 3,948 jobs per km² is above the London average (3,300 jobs per km²), but well below the Inner London average (10,600 jobs per km²). As to be expected, there are particularly high levels of employment density around

the town centres, such as Elephant & Castle, Lewisham and Catford. The only area to be above the average Inner London employment density is to the north of Elephant and Castle.

Economic Productivity

2.62 As shown by Figure 2.24, employment in the Corridor is very heavily skewed towards public admin, education and health, with 48% of all jobs in the Corridor falling within these sectors compared to 22% across London's economy. This is likely to be a result of the presence of large public sector employers in the Corridor, including Lewisham Hospital and Lewisham Council.

2.63 The reliance on sectors such as these, as well as retail, businesses support services and hospitality, leisure and recreation, means the Corridor's economy is heavily service focused, with jobs tending to be lower value and often lower skilled as a result.

2.64 The knowledge, digital and creative sectors (high value sectors) are underrepresented in the Corridor's economy. Whilst there are clusters of employment in these industries across the Corridor, such as around Elephant & Castle and in New Cross Gate (see Figure 2.25), on average only 17% of employment is in these high value sectors in the Corridor, compared to 35% in London.

2.65 However, growing these sectors in the future is an area of focus for both Lewisham and Southwark Councils. Both have recently published strategies which focus on growing the creative industries whilst ensuring benefits are felt by local people and places:

- Lewisham's Creative and Digital Industries Strategy 2017
- Southwark's Creative Southwark: Cultural Strategy 2017-2022

2.66 Lewisham also received funding from the Mayor of London in 2019 to support the establishment of one of the city's first Creative Enterprise Zones in Deptford

Figure 2.24 Top Employment Sectors in the Corridor

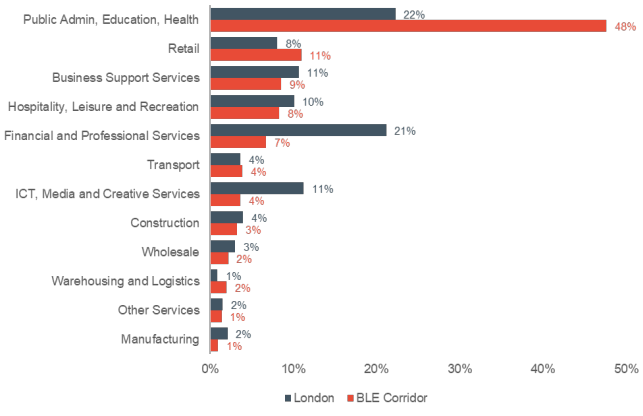
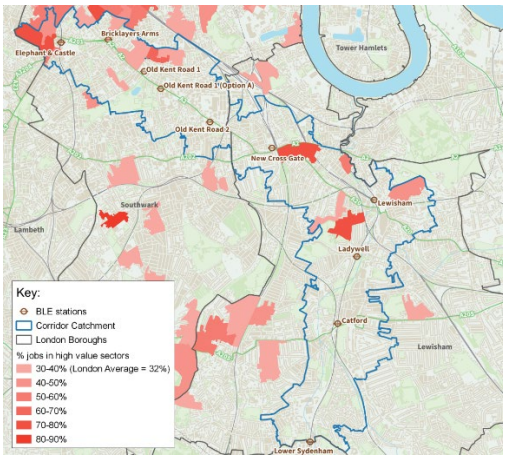


Figure 2.25 % of Jobs in High Value Sectors (above London Average)



Source: BRES 2017. Contains OS data © Crown copyright and database right 2018

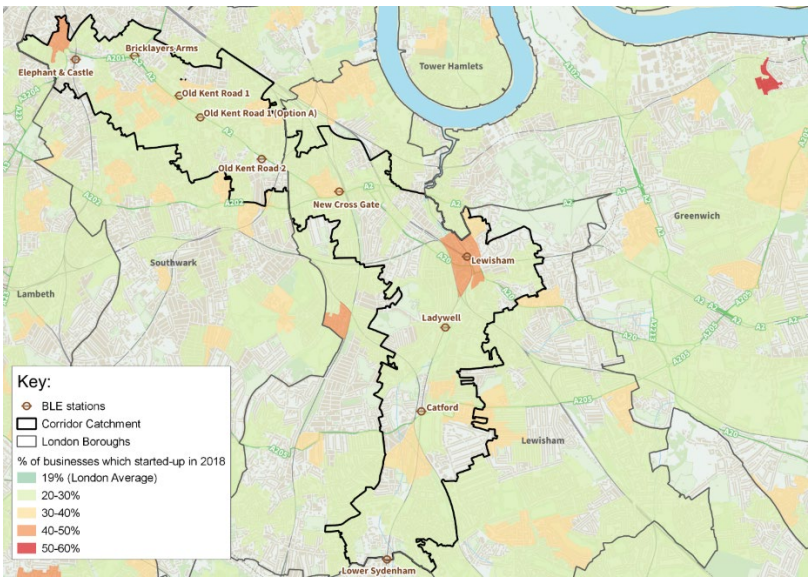
Enterprise

2.67 Companies House data shows the number of businesses that have started-up in an area and can be used to determine start-up rates (start-ups as a proportion of the total business base). The strong presence of a start-up economy often suggests that an area has the right conditions for business growth and that, crucially, its where businesses want to be located. This can be a useful indicator for the growth trajectory of an area, and analysis shows that

in 2018 the Corridor had a start-up rate of 23%, compared to an average of 19% across London.

2.68 Amongst other factors, this high rate is likely to be a result of the historically lower commercial and property values in the Corridor. As shown by, Figure 2.26 the start-up rate varies geographically, but Lewisham and Elephant and Castle have particularly strong rates (between 40-50%). These are both town centre locations where there is typically a lot of SMEs and business churn, and they both benefit from good existing transport connections. However, this trajectory may be challenged in the future by rising commercial and residential rental values and the declining availability of affordable space.

Figure 2.26 Business Start-up Rate 2018 (showing only above London average)



Source: Companies House 2018. Contains OS data © Crown copyright and database right 2018

Questions for the Impact Assessment

- *Employment:* can investment linked to the BLE support job growth and the creation of job opportunities for local people?
- *Businesses:* can investment linked to the BLE support business growth and support new businesses to start up and grow?
- *Attractive Economic Environment:* can new connectivity and accessibility as a result of the BLE make certain areas of the Corridor more attractive locations to do business?
- *High Value Sectors:* can investment linked to the BLE encourage the growth of higher value sectors and the creation of higher-value and higher-skilled employment?

4. Future Growth Trajectory of the BLE Corridor

2.69 The baseline analysis has highlighted the recent years have seen a period of strong growth across the Corridor.

2.70 From a residential perspective, housing delivery and population growth have been strong, but significant challenges persist in terms of demand and affordability. From a commercial perspective, the Corridor is characterised by strong and growing economic demand: highlighted by growing employment levels, and very low levels of availability of space.

2.71 Demand is expected to continue to increase over the coming years. According to GLA Population Projections, for example, the Corridor population will have reached 285,400 people by 2031. This is a 58% increase on current levels, compared to only a 13% increase in Inner London and 15% across London in the same period. Significant transport infrastructure investment will be required to accommodate this growth.

Recent development in Lewisham

2.72 In response to significant and growing demand across the city, the draft new London Plan sets ambitious new targets for London Borough's for delivery over the next ten years: 25,540 units for Southwark (2,554 per annum), and 21,170 for Lewisham (2,117 per annuum).

Future Growth Potential (without the BLE)

2.73 In response to these pressures, and as part of their statutory planning responsibilities, Southwark and Lewisham have both been undertaking detailed work to map capacity for housing and commercial delivery across the area over the coming decades. Current estimates of future delivery potential across the Corridor (in a scenario where the BLE does not come forward) are presented in Figure 2.27 below.

Figure 2.27 BLE Corridor Development Potential without BLE

	Housing capacity	Commercial capacity
Elephant & Castle	0	32,800 sqm
Old Kent Road	9,500	139,500 sqm
New Cross Gate	6,800	5,800 sqm
Lewisham Town Centre	5,200	46,000 sqm
Ladywell	300	3,200 sqm
Catford Bridge	3,600	17,300 sqm
Lower Sydenham	1,400	27,300 sqm
Corridor Total	**26,800** (potentially increasing population by over 60,000)	**271,900 sqm**

Source: Southwark and Lewisham Councils. Figures rounded to the nearest 100.

Potential Impact of the BLE on Future Housing and Commercial Delivery

There is an expectation that the BLE will help to enhance delivery levels over and above these figures, and support the viability of affordable housing within these figures.

The extension of the Bakerloo Line is identified in the New London Plan as a priority infrastructure scheme that is not only key for supporting London's growth, but also for bringing significant economic and social regeneration benefits, including homebuilding and job growth, to the areas surrounding the new line.

In particular, the BLE is highlighted as having the potential to catalyse growth in two of the Mayor's Opportunity Area's: Old Kent Road (OKR OA) and New Cross/Lewisham/Catford (NCLC OA), unlocking significant development and public realm upgrades around stations in these areas.

The potential of the BLE to catalyse growth over and above the figures referenced in the table above, is considered within the impact assessment in Chapters 6 and 7.

3. The BLE: Background and Potential Transport Impacts

3.1 The research presented within this chapter provides a summary of current transport provision along the proposed BLE Corridor and the potential the impact of the scheme on levels of accessibility and connectivity across South London.

Summary and Implications for the Impact Assessment

Current Transport Provision in Southwark and Lewisham

The BLE corridor has a wide range of current rail and bus provision. Whilst there are some areas, such as Elephant & Castle, New Cross Gate, and Lewisham town centre where public transport accessibility is reasonably high, other parts of the corridor have more limited provision.

Direct access into central London is particularly poor from a number of localities across the corridor.

Potential Transport Impact of BLE

The BLE offers significant potential to enhance public transport provision. The frequency of rail provision will increase significantly across the corridor, specifically along the Old Kent Road where there is currently no direct provision. There will also be major reductions in journey times for trips along the corridor and into central London. Whilst the largest impacts will be along the Old Kent Road, there will still be a step-change in public transport provision across all of the station locations in Lewisham.

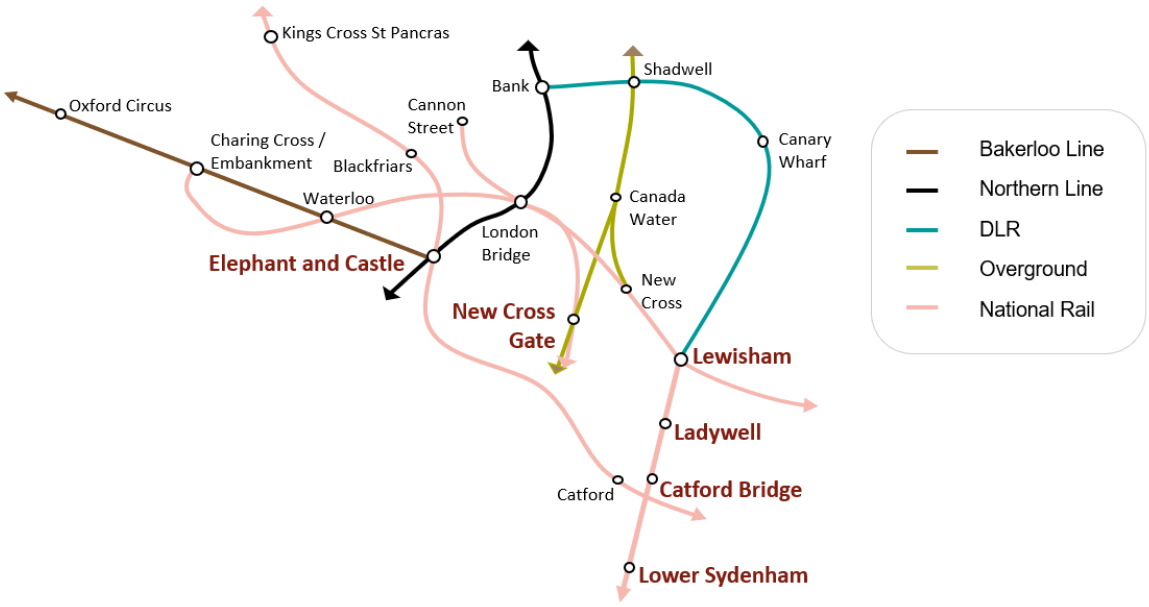
Local Transport Context: Current Provision in Southwark and Lewisham

3.2 This section reviews the current levels of transport provision across the BLE corridor. It establishes the current level of connectivity and accessibility for individual town centres and provides the 'Reference Case' against which the improvements delivered by the BLE can be assessed.

Rail and Underground Provision

3.3 The proposed BLE Corridor encompasses a range of existing public transport at different points of the network. Figure 3.1 provides an indicative network diagram highlighting the existing rail, underground and DLR connections.

Figure 3.1 Indicative Representation of Current Rail Network Connections



3.4 Elephant and Castle currently has the greatest public transport provision. It already has access to the Bakerloo Line, as well as the Northern Line and Thameslink and Southeastern rail services from the south and into Blackfriars and King's Cross St Pancras.

3.5 Between Elephant and Castle and New Cross Gate there is currently no rail or Underground provision and so the proposed BLE stations along the Old Kent Road would represent entirely new provision.

3.6 New Cross Gate is on the Overground network, with connections to Canada Water (Jubilee Line) and to the south towards Crystal Palace and West Croydon. There is also access to Southern Rail services. Additional access to Overground and Southeastern rail services is also available at nearby New Cross Station.

3.7 Lewisham Station provides access to Southeastern rail service through London Bridge and on to Cannon Street and Charing Cross. It is also a DLR terminus with access to Canary Wharf, and beyond.

3.8 Ladywell, Catford Bridge and Lower Sydenham all provide access to Southeastern service from Hayes into Cannon Street and Charing Cross. Catford Station also provides access to Thameslink services to Blackfriars and Kings Cross St Pancras.

Bus Provision

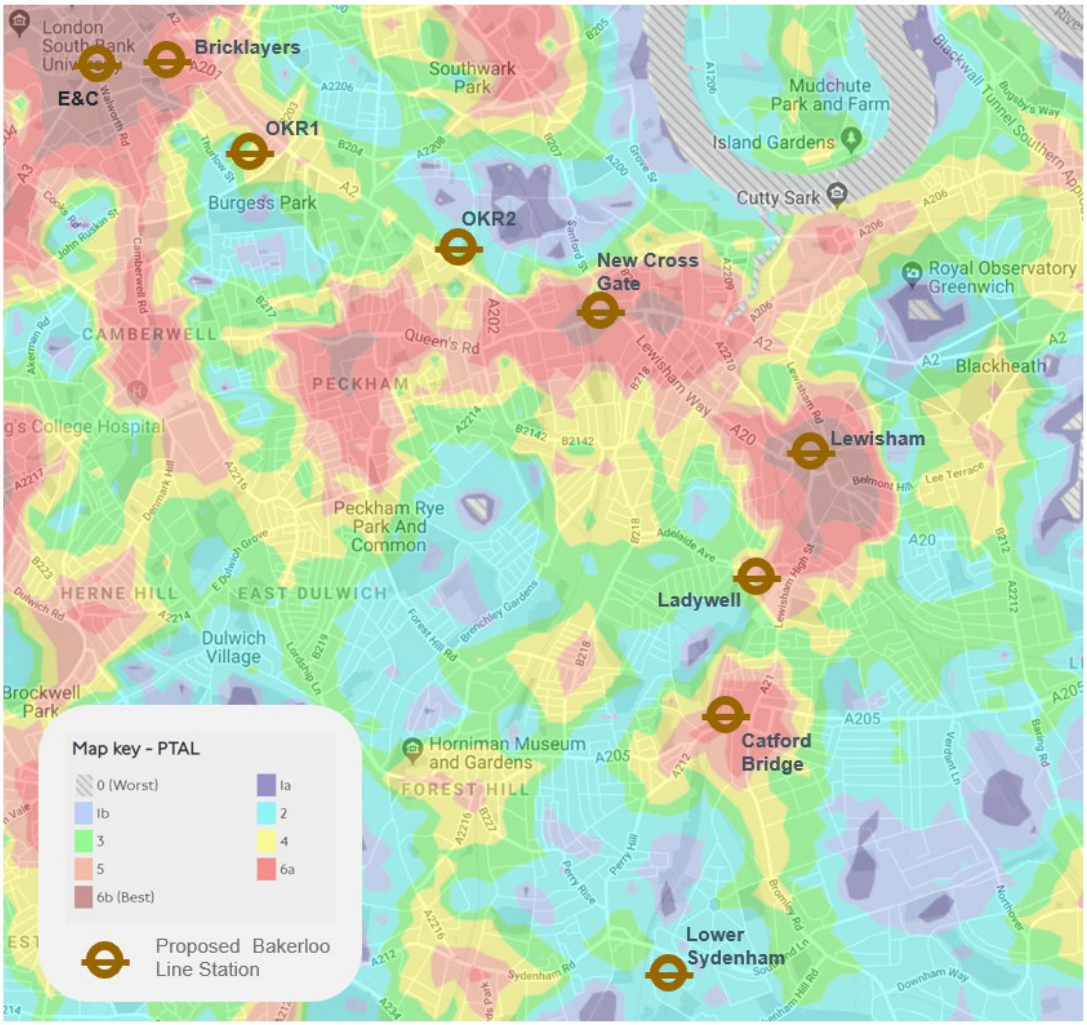
3.9 There is also an extensive bus network serving the BLE corridor. There is a particularly high level of service along the Old Kent Road, with up to eight routes running along parts of the corridor from Elephant & Castle and New Cross Gate and additional cross-cutting services. These provide the primary source of public transport provision across the Old Kent Road corridor and so are heavily relied upon to access both local and central London destinations. Whilst frequencies are high, the associated journey times are much slower than would be expected of a comparative Underground rail service.

3.10 There are similarly high levels of routes serving Lewisham Town Centre providing connections into the centre from surrounding areas. Many of these are north-south connections down towards, and through, Catford Town Centre, going on to Lower Sydenham. These services provide highly important connections but offer less favourable journey times over longer distances.

Public Transport Accessibility

3.11 The combined rail, Underground and bus provision is incapsulated within TfL's measures of Public Transport Accessibility Levels (PTAL). Figure 3.2 demonstrates the PTAL ratings for areas across the BLE corridor.

Figure 3.2 PTAL Levels



Source: TfL 2019

3.12 As would be expected, PTAL levels around Elephant and Castle are high (6b), reflecting the access to Underground, rail and numerous bus routes. There are also areas of high PTAL in New Cross and Lewisham town centre, although the stations are to the periphery.

3.13 The PTAL levels are considerably lower along the Old Kent Road, with areas as low as PTAL 1a within the catchments of potential BLE stations.

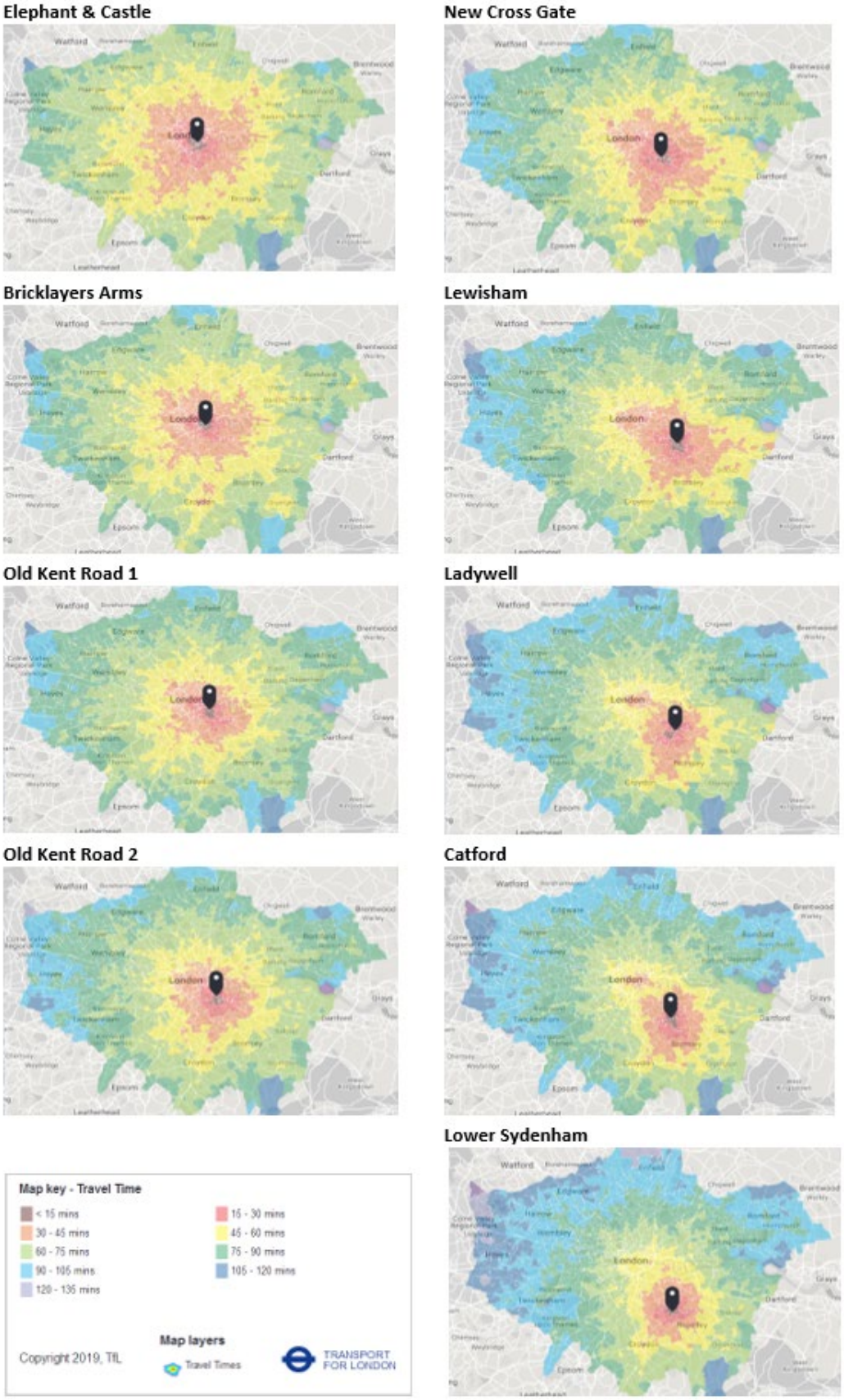
3.14 Similarly, it is noticeable that the PTAL level around Lower Sydenham, which is only served by Southeastern rail services and limited bus provision, has a maximum PTAL of 3 and falls to 1a.

3.15 Whilst PTAL is a useful measure, it does not necessarily provide a complete picture of accessibility as it does not incorporate a depiction of the variety of locations that can easily be accessed from each station. TfL therefore also have an alternative tool available to present a spatial assessment of accessibility through time mapping (TIM).

3.16 This data shows the areas that can be reached, from a defined centroid point, within 15, 30, 45, 60, 75, 90, 115, 120, and 135-minute time bands.

3.17 Figure 3.3 presents TIM outputs for the stations across the proposed BLE corridor.

Figure 3.3 TIM Travel Catchments for selected BLE Station locations



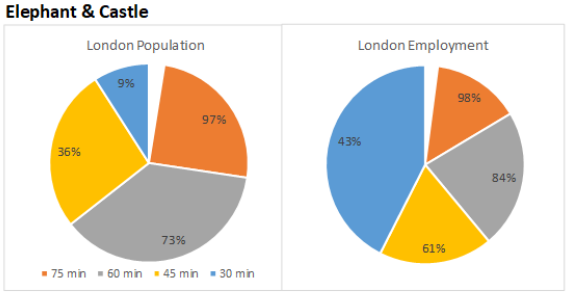
Source: TfL

3.18 The TIM outputs demonstrate the variability of access to Central London based upon different time periods. The impacts can also be presented numerically by examining the proportion of London's population and employment that is accessible in different travel time periods for each station. This data is presented with Figure 3.4.

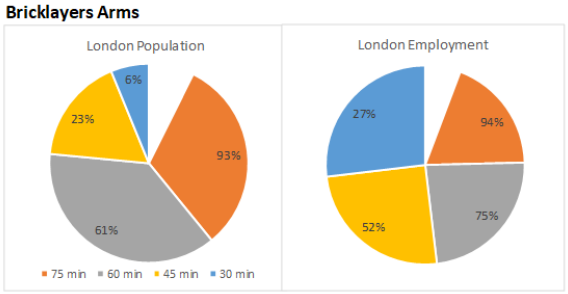
Figure 3.4 Proportion of London's Population and Employment within Travel Distances

Station Locations within Southwark

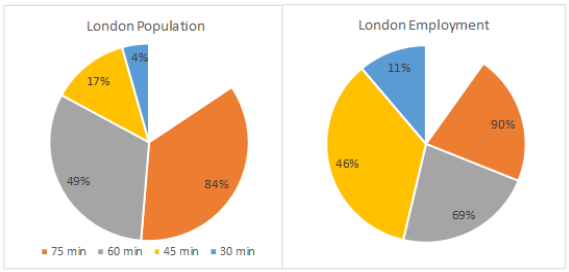
Elephant & Castle



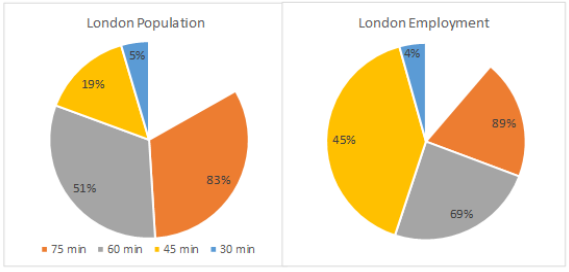
Bricklayers Arms



Old Kent Road 1

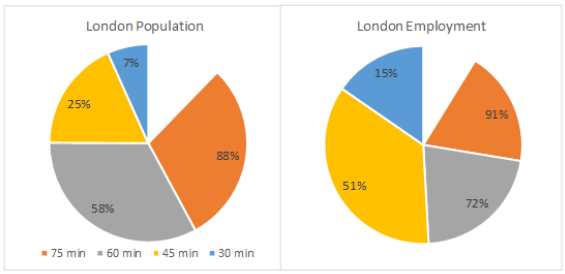


Old Kent Road 2

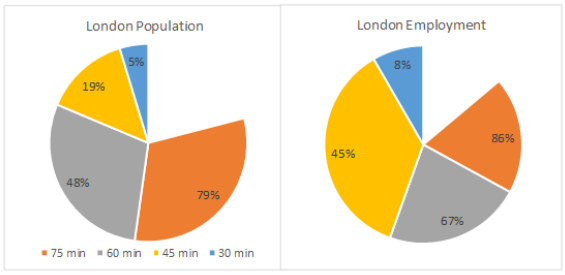


Station Locations within Lewisham

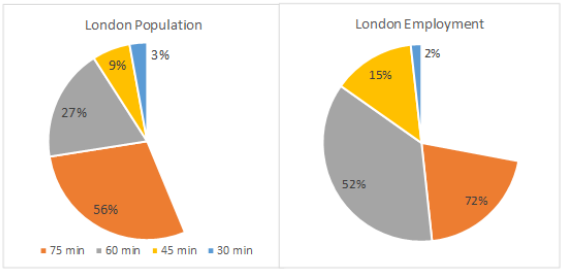
New Cross Gate



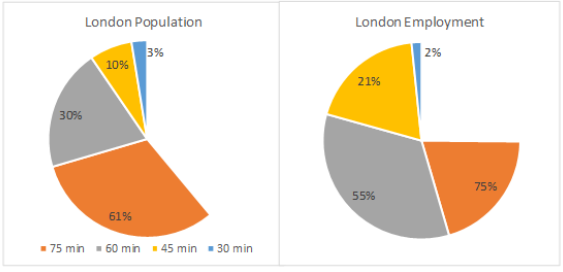
Lewisham



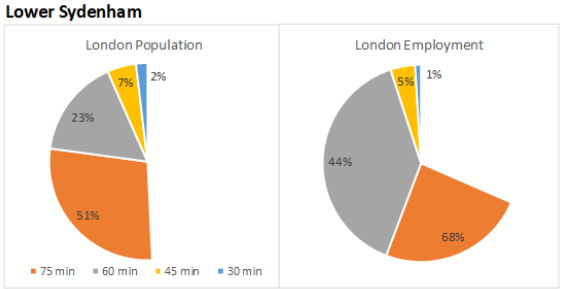
Ladywell



Catford Bridge



Lower Sydenham



3.19 For Elephant & Castle, this shows that 97% of London's population, and 98% of London's employment, can be accessed within 75 minutes.

3.20 For other locations this proportion decreases notably: for Catford, only 61% of London's population, and 75% of employment opportunities can be reached within 75 minutes.

3.21 Even along the Old Kent Road, the proportion of London's employment opportunities accessible within 1 hour decreases from 75% at Elephant & Castle to 69% at Old Kent Road 1 station. For Lower Sydenham this proportion falls to 44%, demonstrating significantly reduced opportunities to access employment.

Potential Transport Impact of BLE

3.22 The potential impacts of the BLE can be assessed in a variety of ways. At a basic level, the direct change in public transport provision from individual locations can be estimated by examining potential changes in ***service frequency***. At a more detailed level, TfL have used their Railplan (public transport planning) model to examine impacts. This provides a tool with which to assess how the scheme will impact upon ***journey times*** across the London public transport network and to forecast potential levels of usage. Data from both these sources can also be used to consider changes in ***accessibility***, along with PTAL and TIM.

Change in Service Frequency

3.23 The introduction of the proposed BLE scheme will deliver a step-change in public transport provision for the majority of station locations along the corridor.

3.24 Table 3.1 sets out the impact upon the level of rail-based public transport service provision into Central London for each proposed station location.

Table 3.1 Changes in Public Transport Provision delivered by proposed BLE scheme

Station Location/Place	Current Rail / Underground / DLR Frequency into Central London	Provisional BLE Frequency	Loss of National Rail Services	Net Impact	% Change
Elephant & Castle	67 tph	36 tph*1	-	14 tph	+21%
Bricklayers Arms	-	36 tph	-	36 tph	n/a
Old Kent Road 1	-	36 tph	-	36 tph	n/a
Old Kent Road 2	-	36 tph	-	36 tph	n/a
New Cross Gate	30 tph*2	36 tph	-	36 tph	+120%
Lewisham Town Centre	44 tph	36 tph	3 tph*3	33 tph	+75%
Ladywell	6 tph	24 tph	6 tph	18 tph	+300%
Catford Bridge	10 tph*4	24 tph	6 tph	18 tph	+180%
Lower Sydenham	6 tph	24 tph	6 tph	18 tph	+300%

*1 Elephant & Castle already has 22 tph Bakerloo Line service northbound, so the 36 tph BLE scheme would not all be additional provision, hence the 'Net Impact' is lower.

*2 Includes services from New Cross Gate and New Cross

*3 Whilst Lewisham town centre would lose the Southeastern train services from the Hayes Line it is more than likely that the line capacity would be used for other services, although they may or may not call at Lewisham town centre

*4 Includes services from Catford Bridge and Catford

3.25 The biggest net impacts occur at the potential Old Kent Road stations, where there is currently no rail-based provision. Ladywell and Lower Sydenham also have a significant enhancement in frequency, which would also occur in New Cross Gate and Catford Bridge stations, even when accounting for provision at their nearby stations (New Cross and Catford).

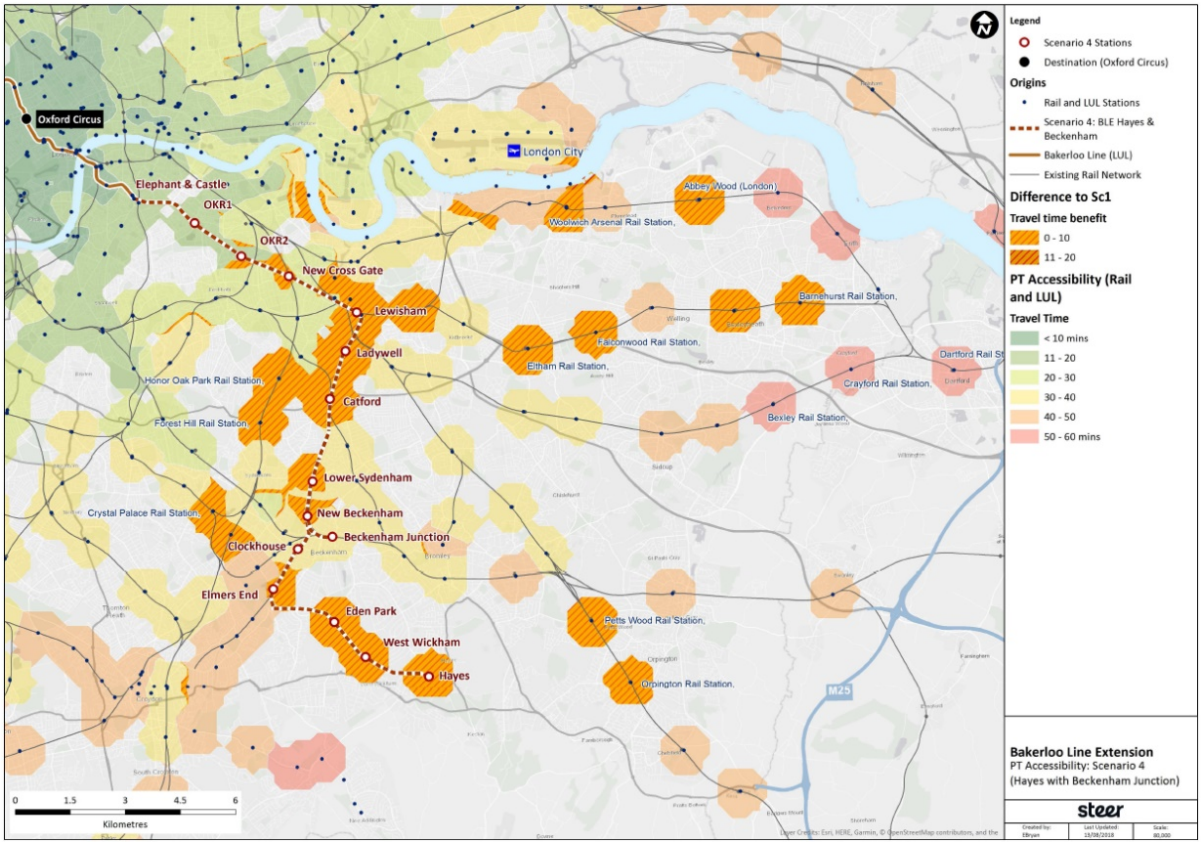
3.26 Even at Lewisham town centre, where provision is already high, the BLE would represent a significant increase in overall service frequency and public transport capacity.

Journey Time Improvements

3.27 TfL have completed a range of analytical work to inform the emerging business case for the BLE project. This includes Railplan modelling that forecasts the change in journey times for passengers resulting from the scheme.

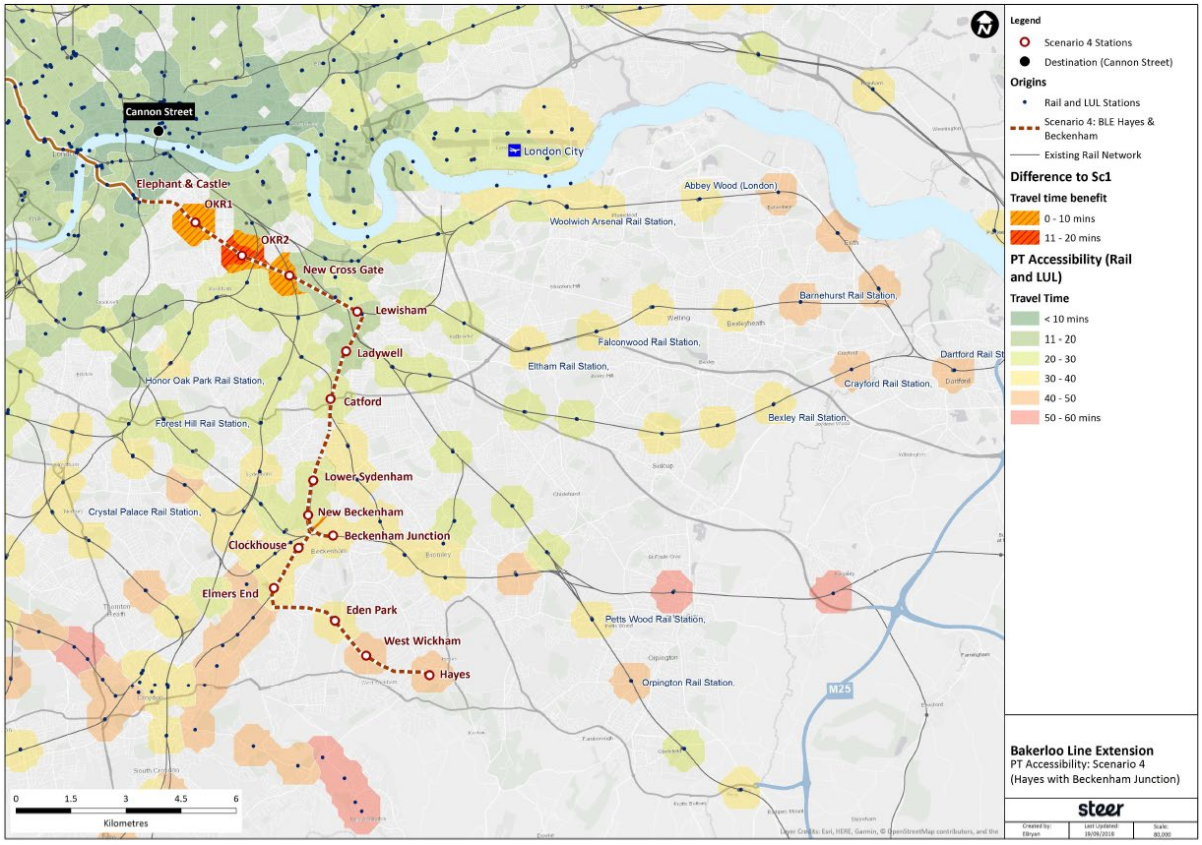
3.28 The scheme is anticipated to generate significant journey time savings for routes into Central London. Figures 3.5 and 3.6 provide indicative outputs demonstrating the impacts.

Figure 3.5 Travel Time Savings to Oxford Circus resulting from BLE Scheme



Source: TfL

Figure 3.6 Travel Time Savings to Cannon Street resulting from BLE Scheme



Source: TfL

3.29 As the figures indicate, the extent of the travel time savings will be dependent upon specific destinations within Central London; however, any location directly accessible from the Bakerloo Line, or via interchanges, will benefit significantly (as shown by the data for Oxford Street in Figure 3.6).

3.30 The Cannon Street example indicates that the benefits will be less pronounced where there are already direct national rail services; however, for the stations along the Old Kent Road the impacts will still be significant.

Accessibility Impacts

3.31 As outlined above in the baseline assessment, TfL examine accessibility using two different metrics, PTAL and TIM. The estimated impact of BLE upon PTAL ratings is presented within Table 3.2.

Table 3.2 Impact of BLE upon PTALs

Station Location	Current Estimated PTAL at Station Location	Forecast BLE PTAL at Station Location	Ranking of % Change in PTAL at Station Location*
Elephant & Castle	6b	6b	1
Bricklayers Arms	6a	6b	2
OKR 1A	5	6b	3
OKR 1B	4	6b	3
OKR 2	4	6b	3
New Cross Gate	6b	6b	2
Lewisham Town Centre	6b	6b	1
Ladywell	5	6a	2
Catford Bridge	6a	6a/6b	2
Lower Sydenham	2/3	4	2

Source: Hatch Regeneris

* A ranking of the relative scale of change in PTAL score as a result of BLE (3= high; 1 = low)

3.32 For a number of the locations along the corridor, the PTALs are already relatively high. The most significant change in PTAL scores will result along the Old Kent Road, where BLE will provide a new Underground connection into Central London. The impact is lower at the north end of Old Kent Road, particularly at Bricklayers Arms, as there is already reasonable walk access to the Bakerloo and Northern Lines at Elephant & Castle.

3.33 PTAL scores are already high at New Cross Gate and Lewisham town centre and so, whilst BLE will provide a significant improvement in service, the impacts are lower than for Old Kent Road.

3.34 For Ladywell, Catford Bridge and Lower Sydenham, the BLE will replace an existing rail service on the Hayes Line. Whilst the frequency of service and speed will increase significantly, in PTAL terms, the changes are slightly smaller for these stations.

3.35 Some of the limitations of PTAL have already been highlighted and so it is important to consider the wider accessibility impacts in terms of increased connectivity to new locations.. Future year TIM outputs for BLE are not currently available and so, instead, we have considered a combination of three factors:

- How BLE improves journey times between key locations across the corridor?
- Whether BLE provides entirely new connections to different locations?
- How BLE provides connection to key facilities and services, such as those in town centres, health facilities and education?

3.36 The process of this connectivity analysis is summarised in Table 3.3, with a description of the process provided below.

Table 3.3 Impact of BLE upon Measures of Connectivity

Station Location	Corridor Journey Time Ranking*	New Route Ranking#	Access to Services Ranking~
Elephant & Castle	1	1	1
Bricklayers Arms	2	3	4
OKR 1A	3	4	4
OKR 1B	3	4	4
OKR 2	4	4	4
New Cross Gate	3	2	2
Lewisham Town Centre	3	1	3
Ladywell	3	2	3
Catford Bridge	2	1	3
Lower Sydenham	2	2	3

Source: Hatch Regeneris

* A ranking of how BLE improves cross-corridor journey times (4= high; 1 = low)

A ranking of how BLE provides new route connections (4= high; 1 = low)

~ A ranking of how BLE improves access to facilities and services (4= high; 1 = low)

3.37 The corridor journey time impact examined improved in connectivity times from a station to a series of locations across the Bakerloo Line, as well as other prominent Central London locations, such as King's Cross and Bank. Not unsurprisingly, station towards the middle of the BLE scored higher for improved journey time across the corridor but OKR2 scores particularly well.

3.38 The new route assessment examines new connections established from each station. The Old Kent Road stations score highest, with New Cross Gate, Lewisham Town Centre, Ladywell, and Lower Sydenham also seeing significant improvements.

3.39 The access to services considered how the BLE improves connectivity to town centres, health and education. Again, the Old Kent Road stations score highest but Lewisham Town Centre, Ladywell, Catford Bridge and Lower Sydenham also score highly as well.

3.40 The assessment of PTAL and the other measures of connectivity have been combined to produce an overall assessment of how BLE will improve accessibility across each station and is summarised in Table 3.4.

Table 3.4 Overall Assessment of Accessibility Improvements from BLE

Station Location	Accessibility Assessment	Station Location	Accessibility Assessment
Elephant & Castle	✔ ✔ ✔	New Cross Gate	✔ ✔ ✔ ✔ ✔
Bricklayers Arms	✔ ✔ ✔ ✔	Lewisham Town Centre	✔ ✔ ✔ ✔ ✔
OKR 1A	✔ ✔ ✔ ✔ ✔ ✔	Ladywell	✔ ✔ ✔ ✔ ✔
OKR 1B	✔ ✔ ✔ ✔ ✔ ✔	Catford Bridge	✔ ✔ ✔ ✔
OKR 2	✔ ✔ ✔ ✔ ✔ ✔ ✔	Lower Sydenham	✔ ✔ ✔ ✔ ✔

Source: Hatch Regeneris Scale: ✔ x1 lower level accessibility impact; ✔ x7 high level accessibility impact

3.41 This reiterates that the largest impact will be across the Old Kent Road stations, with OKR2 having the largest improvement.

3.42 There are similar levels of impact across the Lewisham station locations, although not always for the same reasons. Whilst we might anticipate a higher score for Catford Bridge, the fact the BLE replaces an existing rail service along the same alignment, and there are services from Catford to Elephant & Castle, means there is a lower step-change in direct benefits in comparison to some of the other stations. It should be reiterated that the BLE will still represent a significant enhancement to transport provision at Catford Bridge.

4. Southwark and Lewisham BLE Impact Framework

4.1 The baseline research summarised in Chapters 2 and 3 has supported the development of a bespoke impact framework with which to assess the local economic and social impacts of the BLE in Southwark and Lewisham.

4.2 It is important to note that there is no single set of guidance relating to assessment of local economic and social impacts of major transport assessments. Much of the guidance which exists (such as the HM Treasury Green Book and WebTAG) is highly technical in nature and focused more overtly on macro level transport and development (land value uplift) impacts than local economic and social conditions.

4.3 As such, while the framework takes into account and aligns with, standard appraisal and impact assessment methodologies and guidance, where possible, it also reflects a highly tailored response to local conditions and priorities.

The Role of Transport in Local Economies and Communities

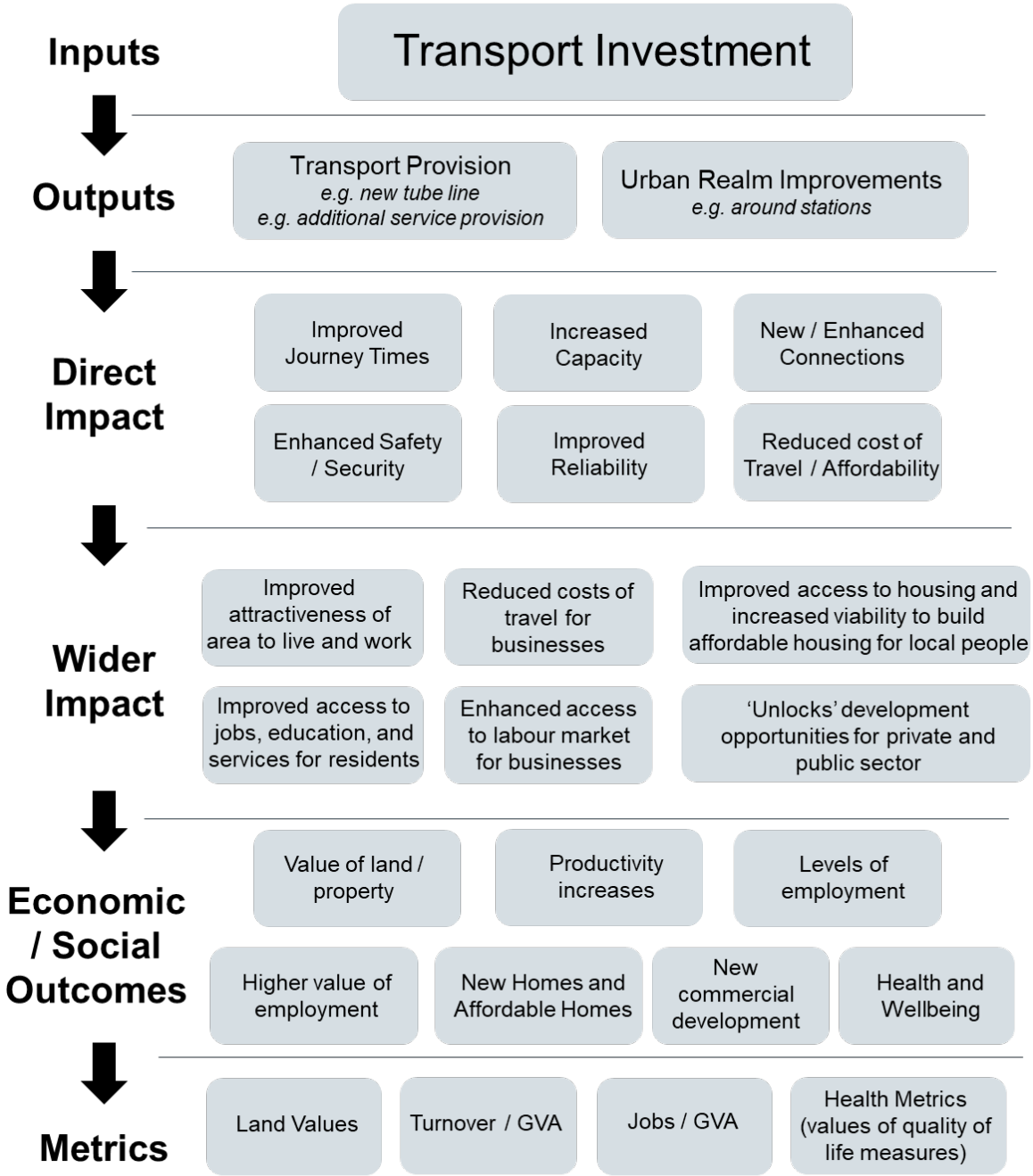
4.4 Transport provision acts as an enabler across local economies and communities, permitting residents, workers, and businesses to access opportunities to live, work and make connections.

4.5 The investment in new transport provision has the potential to act as a major stimulus to new economic and social activity, enabling travelling to and from a local area more efficient and attractive. This not only affects individual's and businesses' travel choices but also how they view the attractiveness of specific areas to live, work, learn or socialise. This, in effect, increases the demand by individuals and businesses for property, goods, and services in an area and so can have a positive impact upon local economic and social activity.

4.6 Table 4.1 sets out this 'theory of change' from a transport investment in a diagrammatic format, demonstrating the links from:

- ***Inputs*** *The funding investment in transport*
- ***Outputs*** *The actual transport provision delivered*
- ***Direct Impacts*** *How the transport provision directly affects travel opportunities*
- ***Wider Impacts*** *The ways in which this may change the attractiveness of an area*
- ***Economic / Social Outcomes*** *How this translates into a change in economic or social activity*
- ***Metrics*** *How these changes can be measured*

Table 4.1 Theory of Change Diagram



4.7 The diagram indicates a range of p1+2otential wider impacts and associated economic and social outcomes. Some of these can be measured in direct monetary terms (land values, GVA), whereas others can be reported through qualitative mechanisms (health metrics).

4.8 Changes in the value of land/property reflect the underlying level of productivity associated with that asset. It is a primary mechanism, recognised by Government guidance, for determining the amount of benefit that that is generated to the economy as a one-off uplift.

4.9 Gross Value Added (GVA) provides an alternative mechanism to assess economic value deriving from changes in output (turnover of business) or additional employment opportunities. This tends to be measured on an annual basis and so impacts are assessed over defined time periods (typically 10 years).

Learning from Past Research and Evaluations

In assessing local impacts for the BLE, research from past transport investments will be taken into account. While there are a number of studies which are relevant in this regard, few appear to provide detailed 'post-ante' evidence on local socio-economic impacts.

Table 4.2 Summary of Findings from Relevant Impact Studies

Scheme	Overview	Headlines
1. Post completion evaluation		
Appraisal of the Jubilee Line Extension (Buchanan and Partners)	Strong focus on transport user benefits and values of time savings: congestion relief; net rail revenues; highway benefits; safety benefits. Overall limited focus on wider impacts aside from analysis on increases to land and property values, agglomeration benefits and GDP impact	Net impact of £9.6bn for 2000-2060 BCR of 1.75 Employment uplift of 33,000 people Contribution to GDP growth of 2.5% Average earnings increase of 94p per person per week due to employment density agglomeration
Impact of DLR at North Woolwich Station	Improved connectivity to employment opportunities; resident's perceptions of place & neighbourhood including likelihood to leave, perceptions of crime etc and impact of DLR on local area; reasons for using DLR and transport mode choice.	90% of survey respondents felt the DLR had improved the area by bringing people into North Woolwich and extending the travel horizon of residents; enabled residents to access employment opportunities in in Lea Valley and East London
2. Research during delivery		
Crossrail Property Impact Research (various)	Focus on residential/ commercial impact by multiple property firms.	e.g. research by GVA: Over 57,000 new homes and 3.25m sqm of commercial space; Commercial office values around stations in central London will increase over the next decade with an uplift of 10% in capital value; residential values are projected to increase immediately around stations in central London by 25%, and by 20% in the suburbs; land values reportedly increased by a range of 23% to 146%
Crossrail Socio-Economic Benefits Tracking	Focus on delivery of apprenticeships as part of Crossrail construction, dependent development, employment impacts	Over 1,000 apprenticeships, contractor target of 1 apprentice (or equivalent) per £3m contract value, partnership with Job Centre Potential for 90,000 new homes along the route 10,000 jobs at peak construction
Northern Line Socio-Economic Benefits Tracking	Focus on employment generation during construction and operation, impact on accessibility, impact on existing businesses and community facilities, development impact, and impact on labour market and productivity	NLE could require 609 direct construction jobs per annum, total net construction employment could be 1,035 per annum. There would be 79 direct jobs created during the operational phase and 134 total net operational jobs. NLE could deliver a development impact of 5,500 additional homes and 14,000 additional jobs.

3. Case Making		
Benefit assessment of HS2 in Sheffield (Genecon)	Focus on: Transport user benefits; Additional employment; Ability to attract key sectors; GVA impact; Homes and commercial floorspace delivered; Land value uplift	For Sheffield station, within a 400m radius, total rateable values in the area rose from £8.7 million to £14.7millon between 2003 and 2008 in anticipation of station development
Maximising economic benefits of HS2 in East Midlands (Volterra)	Focus on: Transport user benefits; Labour connectivity; Residential and commercial floorspace delivered & enabled; Additional employment; GVA impact; Improvements to types of employment attracted in an area; Land value uplift; Inward investment and tourism impacts; Impact on rateable values	£5.4bn of economic benefit to East Midlands region; Increased labour connectivity by rail by 14.3% and business connectivity by 23.2% in the Derby/Nottingham area; 13,350 additional jobs in East Midlands 650-875 residential dwellings and 2,800sqm-19,800sqm of commercial floorspace around Toton HS2 station; Potential disbenefit of reduced level of service to Nottingham (2ph to 1ph)

Framework Overview

4.10 Based on the baseline research the following overall parameters have informed the development of the impact framework:

- To ensure truly local assessment of impacts, the framework has been designed to allow for a bottom up and 'site by site' approach to impact measurement. However, given sensitivities relating to some of the local development and regeneration conditions, all reporting will take place at larger, aggregated levels: each station catchment, each borough, and Lewisham and Southwark combined
- The framework allows for the collation of both quantitative and qualitative data. Impacts are quantified where possible, but in other places qualitative assessment of the types and magnitudes of potential impacts is necessary
- In quantifying impacts, a number of different types of value have been considered, recognising that a broad range of different stakeholders will be affected and that each of these will perceive value in different ways. The broad impacts types are: economic impacts (jobs and GVA); commercial impacts (land value uplift and revenue generation); and societal and environmental impacts relating to the individual (personal prosperity, wellbeing and willingness to pay impacts).
- The respective impacts of construction and operational phases of the BLE are recognised and differentiated
- The framework also takes into account adverse impacts and alongside benefits to ensure a full and robust assessment

4.11 The overall impact framework is summarised below, which is disaggregated into the three core themes of:

- Place and space;
- Economy; and
- Community.

Table 4.3 BLE Local Impact Framework - Summary

1. Place and Space	• P1: Residential space lost / gained – direct and indirect • P2: Commercial space lost / gained – direct and indirect • P3: Community space lost / gained – direct and indirect • P4: Urban environment impacts • P5 : Digital Infrastructure impacts **Monetary impacts: Commercial - land value uplift**	Monetary Impacts: Financial – public accounts
2. Economy	• E1: BLE Construction Activities • E2: Wider development construction activities • E3: Size of the economy • E4: Productivity of the economy • E5: Town centre vitality **Monetary impacts: Economic – Gross Value Added**	
3. Community	• C1: User transport benefits • C2: Local access to skills and employment • C3: Access to housing • C4: Access to services and amenities • C5: Personal and community wellbeing **Monetary impacts: Societal –economic prosperity, welfare and willingness to pay**	

4.12 Further details on the individual impact indicators are provided on the following pages. This sets out indicators where impacts can be quantified, and those where a softer / more qualitative approach has been taken.

Theme 1: Place and Space

4.14 The 'place' theme focuses on the impact of the BLE in catalysing development, and in supporting enhancements to the urban environment around each station location.

4.15 The overall metric used to aggregate these impacts in monetary terms is land value uplift.

Table 4.4 Place and Space Impact Assessment: Summary of Indicators

Indicator	Overview	Scale	Focus for assessment (quantified metrics in bold)
PL-1: Residential space lost / gained / accelerated	New housing delivery unlocked by BLE	Station level	• **Number of units - gross and additional** • **Number of affordable units - gross and affordable** • Type of units and balance of local housing market
PL-2: Commercial space lost / gained / accelerated	New commercial delivery unlocked by BLE	Station level	• **m2 of office, industrial and town centre space** • Types of spaces (e.g. flexible workspaces) and balance of local commercial accommodations
Indicator	**Overview**	**Scale**	**Focus for assessment (quantified metrics in bold)**
PL-3: Community space lost / gained	New community infrastructure unlocked by BLE	Station level	• Types of community spaces which might come forward and ability to respond to imbalances in current provision
PL-4: Urban environment impacts	Effects of BLE delivery on the urban environment around each station	Station level	• Scope for delivery of additional open space and green space, and scope of opportunities to enhance the quality of public realm • Air quality and noise levels– both during construction and operation • Overall effect on attractiveness and environmental resilience of area
PL-5: Digital Infrastructure	Role of BLE in enabling delivery of broader infrastructure	Route as a whole	• Investment in new digital infrastructure via delivery; role of next generation connectivity in supporting economic evolution and growth

Theme 2: Economy

4.16 The 'economy' theme focuses on the impact of the BLE in supporting economic development around each station location – in terms of job creation and business investment.

4.17 The overall metric used to aggregate these impacts in monetary terms is jobs and Gross Value Added (GVA).

Table 4.5 Economy Impact Assessment: Summary of Indicators

Indicator	Overview	Scale	Focus for assessment *(quantified metrics in bold)*
E-1: BLE Construction Activities	Jobs and supply chain benefits linked to the construction of the BLE itself	Southwark and Lewisham	• **Number of construction jobs supported and duration (plus local multiplier benefits)** • Nature of jobs likely to be created and the extent to which this has the potential to translate into longer term benefits • **Value of supply chains and multiplier benefits** • Nature of contracts likely to be created and the extent to which this has the potential to translate into longer term benefits
E-2: Wider development construction activities	Jobs and supply chain benefits linked to the construction enabled by the BLE	Station level	• **Number of construction jobs supported and duration (plus local multiplier benefits)** • **Value of supply chains and multiplier benefits** • Nature of jobs and contracts likely to be created and the extent to which this has the potential to translate into longer term benefits
E-3: Size of the economy	Potential for additional employment within new and existing commercial spaces	Station level	• **Number of jobs (plus multipliers) – in existing and new space**
E-4: Productivity of the economy	Potential for evolution in the types of jobs and activities taking place within new and existing spaces	Station level	• Type of jobs likely to be created, and potential for evolution in the sector make up of the local economy
E-5: Town centre vitality	Potential for improvements in overall quality and vitality of town centre offering	Station level	• **Potential additional town centres users and spend** • **Jobs supported by new household expenditure and by spend of new employees** • Overall size profile of the town centres, and quality of the environment

Theme 3: People

4.18 The 'people' theme focuses on the impact of the BLE on the 'individual' in areas around each station location.

4.19 The metrics used to aggregate these impacts in monetary terms is personal prosperity and social wellbeing.

Table 4.6 People and Community Impact Assessment: Summary of Indicators

Indicator	Overview	Scale	Focus for assessment (quantified metrics in bold)
C1: User transport benefits	Benefits to individuals in terms of connections to jobs and services	Station / Corridor	• Transport impacts during construction • **Journey time savings for residents** • Modal shift and wider benefits of this to the individual
C2: Local access to skills and employment	Potential for individuals to benefit from new training and employment opportunities	Station	• **Number of local people benefitting from apprenticeships and training linked to BLE construction** • **Number of local people to benefit from jobs linked to BLE construction** • Potential for local people to benefit from jobs linked to BLE development and economy uplift
C3: Access to housing	Potential for individuals to benefit from access to housing	Station	• Number of people accessing affordable housing • Risk of increasing property values adversely impacting existing communities
C4: Access to services and amenities	Potential for individuals and communities to benefit from enhanced access to services and amenities	Station	• Improved access to high quality services and amenities. Risk of changing demand for services and amenities impacting on current provision
C5: Personal and community wellbeing	Potential wider benefits to social and community wellbeing	Station	• People with improved health and wellbeing via access to employment, and an enhanced urban environment • Wider impacts on community integration

Assumptions Underpinning the Assessment

4.20 Given that the proposals for the BLE are still being defined, there are a number of elements of the project which have not yet been fully defined. However, in order to undertake robust impact analysis, an agreed scope of the BLE project is required to form our 'central case'.

4.21 This section sets out the parameters that have underpinned the assessment, including the extent of the BLE scheme, station and work site locations, and station catchment boundaries. These have been designed in agreement with Lewisham and Southwark Councils.

Scope of the BLE Scheme

4.22 Chapter 1 and Figure 1.1 set out the route specification for the purposes of this study. This incorporates Lewisham's preferred option for the BLE to be extended, in full, to Hayes, via Lewisham town centre, as part of the Phase 1 2031 delivery.

4.23 As the scope of research focuses solely on areas within the geographical boundaries of Lewisham and Southwark, impact analysis only considers the area between Elephant and Castle and Lower Sydenham.

4.24 Based on guidance from TfL, the proposed frequency of trains for the BLE of 36 trains per hour to Lewisham and 24 trains per hour through to Lower Sydenham underpins our analysis.

Impact Locations: Stations and Construction Worksites

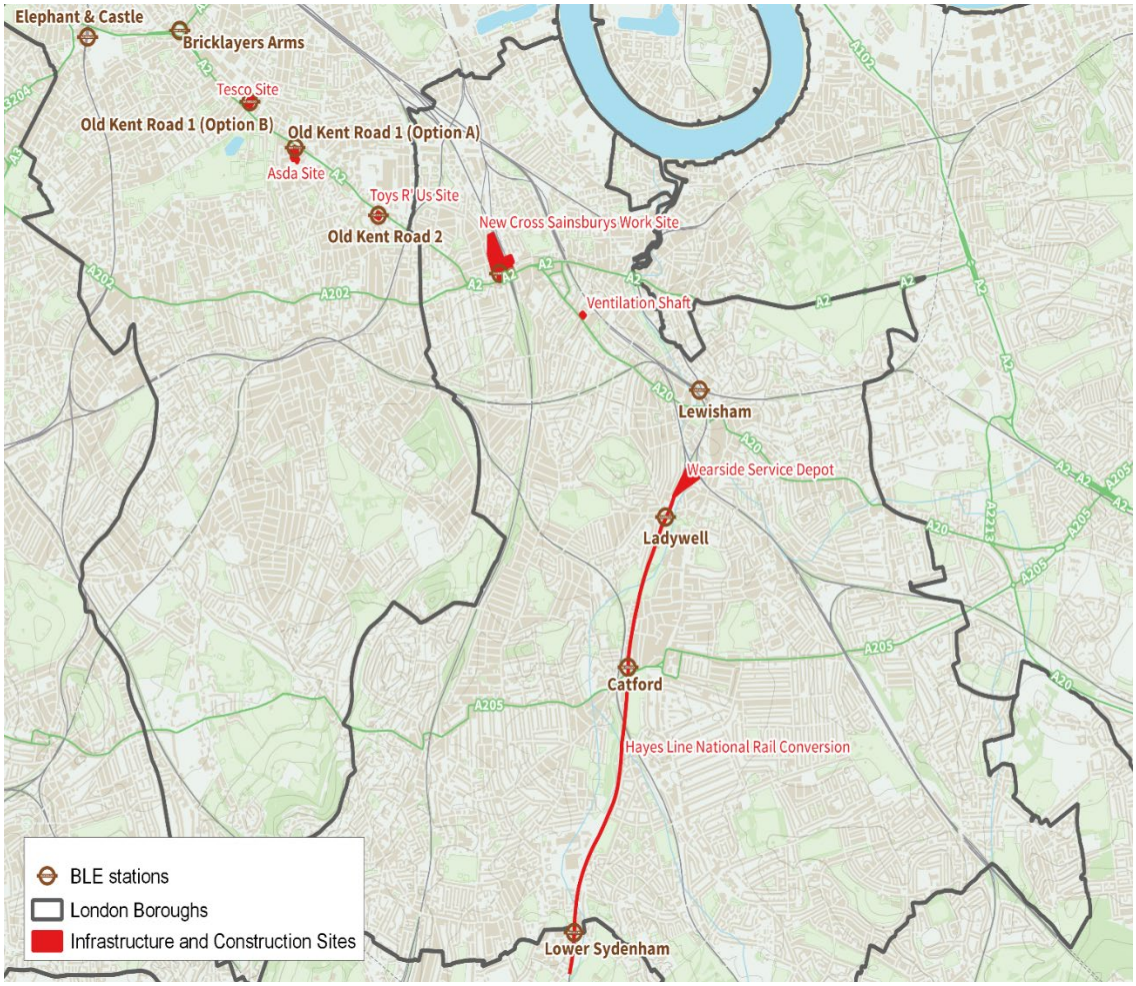
4.25 The list below sets out the locations and details that will inform this study for the station locations which are yet to be fully defined by TfL:

- To account for the potential inclusion of a station at Bricklayers Arms and the impact this would have on the location of Old Kent Road 1, two options have been identified for the station locations along the Old Kent Road:
  - **Option A – Three Stations between Elephant & Castle and New cross Gate:** includes a Bricklayers Arms station at the Bricklayers roundabout, Old Kent Road 1 on the Asda Site, and Old Kent Road 2 on the Toys R' Us site
  - **Option B – Two Stations between Elephant & Castle and New cross Gate:** Old Kent Road 1 on the Tesco site and Old Kent Road 2 on the Toys R' Us site
- The New Cross Gate station site that was consulted upon in 2017 (New Cross Gate Sainsburys site) is assumed as the location of the New Cross Gate BLE station in this study. In addition, an integrated interchange between the Bakerloo Line and Overground Lines is also assumed.
- An integrated interchange in Lewisham town centre at Lewisham Station between the Bakerloo Line and existing National Rail and DLR
- Lewisham Council have considered moving the Lower Sydenham station northwards as part of the development of their Rail Vision. Therefore, this study will consider the impacts of a Lower Sydenham BLE station located further north towards the Bell Green shopping centre.

4.26 In addition to impact analysis around the station sites, impacts resulting from the supporting infrastructure and construction sites need to be assessed. These sites are shown in Figure 4.1 and include:

- A tunnel portal located on the Lewisham Council's Wearside Service Centre, Wearside Road, just south of Lewisham town centre
- A ventilation shaft on the Big Yellow Self Storage – Lewisham Way
- Construction sites as defined in the 2019 consultation:
  - Sainsbury's New Cross Gate aka Hatcham Works
  - Old Kent Road 1 site – Asda site (Option A) or Tesco site (Option B)
  - Old Kent Road 2 site – Toys R' Us.

Figure 4.1 Construction Worksite Locations



Source: Hatch Regeneris. Contains OS data © Crown copyright and database right 2018

BLE Construction Process

4.27 Given that the scheme is still in relatively early stages of design, only high-level information is available from TfL at this stage on the overall construction process. Key assumptions regarding the construction process include:

- Transport and Works Act Order signed by 2022, with construction taking place between 2023 and 2031.
- An overall construction cost of £4.7 to £7.9 billion

4.28 Assumptions regarding construction employment impacts and benefits have been derived drawing on the best practice from the Crossrail and Northern Line Extension case studies outlined earlier in this chapter.

Development Potential Linked to the BLE

4.29 Beyond the scope of the scheme itself, the primary assumptions underpinning the assessment are those relating to the scale of development activity which will be 'enabled' by the BLE in Southwark and Lewisham.

4.30 Figures on the scale of housing and commercial delivery that can be expected have been provided by the London Boroughs of Southwark and Lewisham, based on their own work to map local capacity as part of their statutory planning responsibilities. Key elements of the approach to identifying delivery numbers in Lewisham include:

- Unlike the Old Kent Road, all of Lewisham's BLE Growth Corridor has a degree of existing rail accessibility, albeit subject to large and diverse constraints in terms of the connectivity and capacity provided. This makes the issue of determining which development is dependent on the BLE more challenging to estimate. While much will come forward even without the BLE, much will also need to be unlocked by the BLE's connectivity benefits or impact on the housing market.
- To calculate dependent development for this study, Lewisham has assessed the development capacity of individual station areas and made an estimate based on professional judgement of the additional homes which could be delivered within 10 years of the delivery of the BLE.
- Additional to the purely dependent development, the Council also recognises that the BLE is likely to be a supporting factor in delivery of the approximately 8,000 homes planned along the corridor from the mid-2020s. This will be particularly pronounced in years closer to the line opening, when infrastructure constraints on development become more acute and anticipation of the BLE has greatest impact on the housing market. While this will have a significant additional impact on the local economy, the effect is not quantified in the economic impact assessment numbers, which should therefore be considered as conservative.

Technical Methodology

4.31 The technical approach to assessing the types of impacts assessed throughout this report is provided in Appendix B.

5. BLE Construction Impacts

5.1 This chapter focuses on impacts relating directly to the construction of the BLE. Given the nature of construction activities, the assessment focuses on impacts across the BLE Corridor as a whole; the potential for specific local impacts relating to BLE construction is explored in Chapters 6 and 7.

5.2 The cost of constructing the BLE has been used to calculate construction impacts. This is currently assumed to be between £4.7 to £7.9 billion.

BLE Construction Employment

5.3 The construction of the BLE is a labour-intensive infrastructure development and is likely to support a significant number of jobs. The overall construction costs and build period of the BLE have been used to estimate these construction employment benefits.

5.4 Over the 6-year construction period, the BLE could support in the region of 6,300 construction jobs per annum. This is likely to include specialised (e.g. tunnelling expertise) and non-specialised (security, drivers and general labourers) roles. Given the varied and temporary nature of construction, all of these jobs are unlikely to be FTEs.

5.5 Given the early stage of the planning process and the need to go through procurement, it is not yet possible to identify the geography over which the benefits generated through the BLE construction will be felt the strongest. Overall, it is estimated that construction of the BLE has the potential to directly contribute around £2.7 billion in gross value added (GVA) to the economy.

Lewisham Construction Hub

Potential for Southwark and Lewisham to Benefit

The construction phase also has the potential to deliver benefits beyond economic outcomes. Social benefits to the Corridor can be maximised by using local supply chains and delivering training, apprenticeships and job opportunities to local people. The potential for this benefit to be realised should be a key consideration when developing a strategy for construction, drawing on the best practice from Crossrail and the Northern Line Extension.

For example, during Crossrail construction contractors were committed to delivering one 'Strategic Labour Needs and Training' (SLNT) output for every £3m of contract value. At least half of these outputs had to be priority outputs, which included an apprenticeship, or a new job start for a local unemployed/out of training individual.

According to the HACT Social Value Bank[4], outputs such as these can generate the following monetary social wellbeing values:

- Apprenticeship = £2,400 per annum
- One person moving from unemployment to full-time work = £14,433

Therefore, using Crossrail estimates, if 600 of the BLE construction jobs were a priority SLNT output, this could provide a social value of £8.65m for Southwark and Lewisham (assuming half are apprenticeships and half are job starts).

Supply Chain Expenditure

5.6 In addition to the direct impacts supported by BLE construction, there are likely to be additional benefits resulting from supply chain expenditure both at local and regional levels. Using multiplier benchmarks from the Hatch Regeneris Input-Output Model, it is estimated that around 18,100 jobs per annum could be supported indirectly through supply chain and induced spending, both on- and off-site. This additional job benefit has an indirect GVA impact of £4.6 billion.

Potential for Southwark and Lewisham to Benefit

Through the supply chain expenditure for the construction of BLE, there is an opportunity for local businesses, particularly SMEs, to benefit. Lewisham and Southwark should look to provide support to local businesses to help them access opportunities and contracts on the BLE.

For example, the Northern Line Extension has contracted local businesses in their supply chain through the local organisation 'Supply Nine Elms', part of the Nine Elms Vauxhall partnership. Supply Nine Elms supports local businesses in Lambeth and Wandsworth to become 'tender-ready' to compete for contracts with a range of buyers, including the Northern Line Extension.

Snapshot of Findings

- ✓ Construction will cost between **£4.7bn - £7.9bn** and run from 2023 to 2031
- ✓ **6,300** construction jobs per annum, with **18,100** jobs per annum from supply chains and multipliers
- ✓ Combined GVA impact of construction of **£7.3bn**
- ✓ Potential social value benefit of **£8.65m** for Southwark and Lewisham

[4] Housing Associations' Charitable Trust bank of methodologically consistent and robust social value metrics. HACT is a solutions agency committed to promoting ideas and innovation across the housing sector.

6. Local Operational Impacts: Southwark

6.1 This chapter focuses on impacts relating to the construction and operation of the BLE within Southwark: focusing on Borough wide impacts and impacts within each of the local station catchment areas. The BLE in Southwark will be concentrated in the north of the borough from Elephant and Castle along the Old Kent Road regeneration area, where there is significant scope and capacity for extensive change and regeneration on large sites.

Borough Impacts

6.2 Extending the Bakerloo line in Southwark will result in the creation of two or three[5] additional stations along the Old Kent Road, and major upgrades to the station at Elephant and Castle to connect the Bakerloo and Northern Lines.

6.3 As a result, the potential impact of the BLE on the borough is significant. It will help to unlock 10,800 new homes and 94,900 sqm of commercial space, deliver jobs and increase transport accessibility and connectivity for residents. These impacts are likely to be most prevalent along the Old Kent Road, which is a major opportunity area and the focus of Southwark's growth agenda.

6.4 The aggregated operational impacts of the BLE across the new stations in Southwark are shown below. These impacts can be split into monetary impacts, covering economic, financial and land value benefits, and wider non-monetary benefits to society.

Monetary Impacts

1) Economic

6.5 The development of new commercial and residential space in Southwark associated with the BLE will support new jobs in the borough. This is a result of both the construction of this space, and the new jobs supported in new commercial space. These new jobs have GVA impacts to the economy:

- Construction of new space will directly support around 3,200 jobs per annum, with a direct GVA impact of £2.2 billion and a supply chain impact of £3.8 billion
- 7,200 additional jobs will be supported in new commercial space in Southwark, and will have a direct GVA impact of £2.6 billion and a supply chain impact of £3.1 billion

2) Land Value Uplift

6.6 Land value uplift is an increasingly important measure of the impacts of transport schemes. In this case it captures the increase in the value of land that results from improving transport provision. The BLE will significantly impact on residential and commercial land values in the catchment areas around the new stations in Southwark, in terms of both existing properties and new development.

6.7 Based on research, we have applied two uplift scenarios to capture a high growth and low growth impact. The resulting land value uplift impact for Southwark is £2.4 billion - £2.5 billion.

3) Financial

6.8 The BLE will result in a number of financial benefits for Southwark. Additional commercial space can provide income to the council through the generation of business rates. Using the average business rateable values, it is estimated that additional commercial space

[5] Including a Bricklayers Arms station

associated with the BLE could generate between £82-88 million (NPV) in business rates income over a 10-year period.

6.9 In addition, new residential developments will result in higher council tax returns. In Southwark, there is potential for an economic value equivalent to £112 million of council tax income over 10 years from the new homes associated with the BLE. The development of new homes also results in a number of other financial benefits for the borough, including and economic value of £71 million of New Homes Bonus and £125 million from the Community Infrastructure Levy, over 10 years.

Societal Non-Monetary Impacts

6.10 In addition to the impacts above, the BLE is likely to have a number of wider benefits for the communities of Southwark:

- The BLE will increase the viability of home-building in the borough in the future, supporting Southwark to deliver on its housing need and build affordable and social housing for local people
- Southwark has a diverse population. There are areas of high-levels of deprivation, particularly in the locations where the Bakerloo Line will extend to, as well as communities from different ethnicities and backgrounds. Improving connectivity through the BLE will increase access to employment and other social and leisure opportunities for these groups
- Improved transport accessibility, reduced journey times and enhanced reputation, will support the town centres of the borough by increasing their workforce and visitor catchment. This could support local economies to diversify and become more resilient

Snapshot of Southwark Borough Findings:

- ✓ **10,800 additional homes** and **94,900 sqm** of additional commercial space
- ✓ Total GVA impact from construction of new development and jobs supported in this space **£11.8bn**
- ✓ Land value uplift of up to **£2.4 - 2.5bn**
- ✓ **£82-88** economic value in business rates income from new commercial space
- ✓ **£112m** economic value of council tax income from new homes

Maximisation of Benefits and Mitigation of Adverse Impacts

6.11 Despite the positive benefits of the BLE in Southwark, there are a number of adverse impacts that could arise and should be mitigated against. It will also be important for Southwark to maximise any potential benefits.

- **Affordable Housing -** As land values increase, house prices are very likely to rise. This could result in an increasingly unaffordable housing market in the borough which has already seen strong house price growth in recent years. As a result, the provision of genuinely affordable homes within new development will be of great importance in ensuring local residents can remain within the area.
- **Business Displacement -** The development of new commercial space and the subsequent evolution of the economy is likely to displace current businesses located in and around new station catchments. Independent businesses and those relying on lower value space are most likely to be at risk as rental values increase and the economy shifts to higher value employment. The role of Southwark in mitigating against this impact through provision of affordable workspace, for example, will be key.
- **Construction Impacts** – Southwark will see the construction of at least two new stations which could result in major disruption, particularly along the already congested Old Kent Road due to HGV movements and air and noise pollution. Whilst plans for tunnelling operations are not yet available, it is also likely that this activity will result in increased localised noise and vibrations from the construction activities.

Local Impacts: Elephant and Castle

Current Character

6.12 Elephant and Castle is the most central of the locations along the BLE Corridor. It is a well-known employment location in London, with strong employment growth in recent years and high employment densities. It is also a densely populated area.

6.13 Elephant and Castle is already on the Bakerloo line and is where the line currently terminates in the south.

Elephant and Castle station

Figure 6.1 Elephant & Castle's Catchment Area

Elephant and Castle town centre

6.14 The table below gives an overview of the economic and social characteristics of the area. Cells highlighted in yellow suggest the metric is of particular importance to the area or is of interest (e.g. well above/below average).

	Character	Recent Change	Growth Trajectory (without BLE)
People	**Population 2017** 16,690 people (+)	**Population Change 2012-17** 3% increase in population (−)	**Commercial Space** Capacity for 32,800 sqm commercial space **Wider Aspirations** Major development to deliver on the masterplan for the area, including the creation of a new, accessible town centre
	Deprivation 2015 55% of LSOAs in 20% most deprived	**Change in Claimant Count 2014-19** 7% increase in the number of residents who are claimants (+)	
	Claimant Count 2019 4.5% of 16-64 residents		
Economy	**Employment 2017** 18,390 jobs	**Employment Change 2012-17** 31% increase in employment (+)	
	High Value Sectors 2017 28% jobs in these sectors (−)	**Business Change 2013-18** 31% increase in the number of businesses (−)	
	Business Size 2018* 96.6% of businesses are small or micro (−)		
Place	**Average House Price 2018** £561,833	**House Price Change 2013-18** 60% increase (+)	
	Commercial Values 2018	**Change in Commercial Values 2013-18**	
	Retail - £28 per sq. Ft. (−)	**Retail** - 7% increase (−)	
	Office - £26 per sq. Ft. (−)	**Office** - 96% increase (+)	
	Industrial - £25 per sq. Ft. (+)	**Industrial** – 209% increase (+)	
	PTAL values Average for station catchment = 6b (+)	**Recent investment in transport / public / community infrastructure?** Reconfiguration of E&C roundabout	
	Healthy Streets Score Not assessed		
	Town Centre Vacancy Rate 29% (+)		

+	Above average
=	Similar to average (within +/- 10% of London average)
−	Below average

*+/- 1% of London average

Place

6.15 Elephant and Castle has very strong transport connectivity and accessibility. It is categorised as the highest PTAL rating (6b), and much of central London can be easily accessed within 15-30 minutes.

6.16 Property markets have been growing significantly in the area in the last five years, and industrial space rental values and house prices are now well above the London average. Such increases will inevitably impact on the affordability of residential and commercial spaces in the area, and there is a danger that local residents and smaller, independent business will be pushed out as they struggle to meet rising rents.

Economy

6.17 Elephant and Castle's economy is performing strongly. Employment and business growth rates are around +30%, which is double the London employment growth rate (+15%) and similar to the London business growth rate (+36%). Employment densities are also around 5 times the London average.

6.18 Although lower than the London average (32%), the proportion of jobs in high value sectors is relatively high (27%) compared to other parts of the BLE Corridor. However, there is significant headroom for this to increase, especially given the scale of development currently happening in the area and the central location of Elephant and Castle.

People

6.19 Elephant and Castle has an average population density of 18,490 people per km², which is well above the Inner London average (11,400 people per km²). Residents in the area suffer from high levels of deprivation, with 55% of LSOAs in the top 20% most deprived nationally, compared to just 16% in London. The proportion of the population who are claimants (4.5%) is also well above the London average (2.7%). In addition, alongside rapid growth in the economy, there has been an increasing number of people claiming benefits from the state. In recent years, the claimant count has risen by 7%, compared to a London average decrease of -1%. This suggests that local residents in the area could benefit more from economic growth.

Growth Trajectory (without BLE)

6.20 Elephant and Castle is currently undergoing significant regeneration and development. As a result, much of the potential for delivering new homes and commercial space is already being realised through the masterplan for the area. In total, Elephant and Castle has capacity for up to 32,800 sqm of commercial space. In addition, the masterplan includes plans to create of a major new and accessible town centre.

Potential Local Impacts of the Bakerloo Line Extension

6.21 Whilst the Bakerloo Line already terminates at Elephant and Castle, and so there will be no new transport connections into central London as part of the BLE, delivering the BLE will result in a new consolidated station for the area. The Northern and Bakerloo Lines, which are currently accessed through different entrances, will instead be accessed through one new station at Elephant and Castle, with improved interchange between the lines.

6.22 Therefore, whilst the comparative transport assessment shows a lower impact from the BLE than at other station locations on the Corridor, there will be a range of positive benefits associated with the new interchange. Easy access between the Bakerloo and Northern lines will improve journey times into wider parts of London for users of both lines, as well as users of the BLE.

Place

Development Impact:

35,000 sqm additional commercial space

6.23 Elephant and Castle is already a rapidly changing area. It is one of the most significant Opportunity Areas in central London, and much of the development will be well progressed by the time BLE is delivered. Currently, capacity suggests only 35,000 sqm of commercial space could be delivered as a result of the BLE.

6.24 However, the BLE is likely to reinforce the current development trajectory through improvements to the station and surrounding areas. There is significant potential for major

Elephant and Castle town centre

upgrades to the poor environment, poor station access, and low-quality public realm. Modal shift to the tube on the Old Kent Road as a result of the BLE is also likely to result in reduced congestion in Elephant and Castle, which is currently a major bus interchange for people travelling from the south east of the station.

Economy

6.25 The impact of the BLE on Elephant and Castle's economy will be limited given the constrained capacity for additional development. However, the BLE may contribute towards the economic evolution of the area and further enhance the vitality and resiliency of the town centre.

6.26 The main economic benefits of the BLE in Elephant and Castle include:

1) **35,000 sqm additional commercial floorspace** brings capacity for **2,700 additional jobs**

2) Delivery of new commercial development would support an average of **85 additional temporary construction jobs per annum.** The supply chain and multiplier benefits of this would result in a further **240 jobs per annum**

3) These construction jobs would lead to a **direct GVA uplift of £58.4 million** and a **supply chain and induced GVA uplift of £100 million**

6.27 The addition of new office space is most likely to have the biggest impact on Elephant and Castle's economy, whilst the development of a new accessible station will further enhance the reputation of the area and support the evolution of the economy.

6.28 Despite its relatively central location, Elephant and Castle has a lower than average proportion of knowledge jobs in the economy. As the economy evolves and diversifies, it is likely the profile of jobs could change. If the location quotient of the knowledge industries were to increase to the Southwark average (40%), due to the new space becoming available, and the enhanced reputation of the area, this could result in around 2,400 additional, high value jobs in the area.

People

6.29 It is likely that the largest positive impacts on the local communities in Elephant and Castle will occur as a result of the regeneration and development already happening in the area. Given that Elephant and Castle already has strong transport connections, it is unlikely the BLE will have a major additional impact on connectivity for local people.

6.30 However, there is significant potential for the BLE to support the local community through the creation of jobs for local people. Elephant and Castle has the second highest proportion of communities in the most deprived deciles in the BLE Corridor and has seen an increase in the number of claimants in recent years. Therefore, if policies were put in place to connect local residents to employment opportunities associated with BLE construction and operation, the BLE could support the economic inclusion of communities in the area.

Summary of Impacts:

Elephant and Castle has been undergoing a period of transformational change in recent years, the BLE will support the evolution of the area through:

- ✓ **35,000 sqm** of new commercial space supporting 2**,700** new jobs
- ✓ **85** additional temporary construction jobs in the area to build new development
- ✓ **£58.4m** direct GVA uplift from construction of new commercial space

Maximisation of Benefits and Mitigation of Adverse Impacts

- **Reduced Bus-Tube Interchange –** Elephant & Castle is currently a major bus-to-tube interchange facility, particularly for buses serving the Old Kent Road. The BLE is likely to result in notable alterations to bus service patterns along the Old Kent Road, with a shift to higher levels of tube travel. In relative terms (compared to a non-BLE scenario), this may result in fewer bus-tube interchange movements at Elephant and Castle and, hence, a reduced flow of people entering and exiting the station. This could, in theory, have a marginal, negative, impact on some local businesses around the station, albeit within the wider context of growth at Elephant & Castle it is unlikely to have any material economic impact.

Local Impacts: Old Kent Road

This area encompasses the station catchments around OKR 1, OKR 2 and Bricklayers Arms

Current Conditions

6.31 The Old Kent Road is one of Britain's oldest roads, since Roman times it has been the primary route between London and the Kent coast. The character of the area is currently very industrial, and it struggles to be a destination in its own right due to its status as a highly congested arterial road. However, the area is rich in opportunity, with a strong, longstanding local community and significant opportunity to become an attractive destination through major regeneration and redevelopment.

Figure 6.2 Old Kent Road's Catchment Area

Shops on the Old Kent Road

6.32 The table below gives an overview of the economic and social characteristics of the area. Cells highlighted in yellow suggest the metric is of particular importance to the area or is of interest (e.g. well above/below average).

	Character	Recent Change	Growth Trajectory (without BLE)
People	**Population 2017** 61,100 people	**Population Change 2012-17** 3% increase in population (−)	**Homes** Capacity for 9,500 homes **Commercial Space** Capacity for 139,500 sqm commercial space **Wider Aspirations** Enhance town centre environment via TfL Liveable Neighbourhoods and MHCLG Future Growth Fund
	Deprivation 2015 50% of LSOAs in 20% most deprived (+)	**Change in Claimant Count 2014-19** 3% increase in the number of residents who are claimants (+)	
	Claimant Count 2019 4.7% of 16-64 residents (+)		
Economy	**Employment 2017** 13,500 jobs	**Employment Change 2012-17** 3% decrease in employment (−)	
	High Value Sectors 2017 14% jobs in these sectors (−)	**Business Change 2013-18** 53% increase in the number of businesses	
	Business Size 2018* 97.8% of businesses are small or micro (=)		
Place	**Average House Price 2018** £467,606 (=)	**House Price Change 2013-18** 89% increase (+)	
	Commercial Values 2018	**Change in Commercial Values 2013-18**	
	Retail - £29 per sq. Ft. (−)	**Retail** - 66% increase (+)	
	Office - £24 per sq. Ft. (−)	**Office** - 21% increase (−)	
	Industrial - £15 per sq. Ft. (+)	**Industrial** – 70% increase (+)	
	PTAL values Average for station catchment = 3 (−)	**Recent investment in transport / public / community infrastructure** TfL's Liveable Neighbourhoods	
	Healthy Streets Score 50		
	Town Centre Vacancy Rate 12% (+)		

+	Above average
=	Similar to average (within +/- 10% of London average)
−	Below average

*+/- 1% of London average

Place

6.33 For its relatively central location, Old Kent Road's transport connections and accessibility levels are comparatively poor. The low PTAL value is a result of limited service provision and accessibility, and a heavy reliance on bus networks. As a result, the Old Kent Road has a poor Healthy Streets score. This is heavily influenced by the volume of traffic and associated noise and air pollution, as well as a lack of green and public spaces towards the south-east.

6.34 Over the last 5 years, Old Kent Road has experienced significant growth in its commercial and property values. Although commercial rental values and private house prices are currently similar to, or below, the London averages, they have experienced rapid increases to reach this level. In particular, industrial rental values have grown at +70% vs London's +58% and rent per sq.ft now exceeds the London average. This is likely to be a result of high demand for industrial space across London and very low industrial vacancy rates in Old Kent Road (0.4%).

Economy

6.35 Old Kent Road has a low employment density for its relatively central location. The jobs which exist within the Old Kent Road area are skewed towards lower value sectors such

as retail, hospitality and public admin. These sectors account for over half of all jobs in the area. In recent years there has also been a decline in employment, yet an increase in the number of businesses. This is likely to be a result of the closure of a large (or multiple) business in the area, and the increasing dominance of very small and micro businesses.

People

6.36 One of the biggest challenges currently facing the Old Kent Road is the high level of deprivation in the area. At 50%, the catchment has the joint highest proportion of LSOAs in the top 20% most deprived in the Corridor. This is well above the Corridor (40%) and London (16%) averages.

6.37 A combination of high levels of deprivation, a high claimant count, high population density and low employment density indicates that the local job market is struggling to support the economic participation of the large local population. This is further supported by evidence from wellbeing data, as very low wellbeing scores are driven by high unemployment levels.

Growth Trajectory (without BLE)

6.38 The Old Kent Road has been identified as an important growth location for Southwark and London, with significant capacity for new housing and commercial delivery. The scale of the opportunity has resulted in Old Kent Road being designated as an Opportunity Area in the draft New London Plan and a detailed Area Action Plan (AAP) has been developed by Southwark to guide development. Without the BLE, capacity has been identified for 9,500 homes and 139,500 sqm commercial space; the potential for the BLE to unlock delivery over and above this is considered overleaf.

6.39 Alongside residential and commercial delivery, there are significant proposals for public realm and highway improvements along the Old Kent Road, and funding has already been committed through the Mayor of London and TfL's Liveable Neighbourhoods programme to help improve walking and cycling infrastructure and make roads easier to cross. In addition, Southwark are currently in the process of applying for Future High Streets Funding from MHCLG. Aspirations for this funding include high street improvements such as road junction and public realm improvements, as well as purchasing and developing vacant sites.

Old Kent Road gas tower

Potential Local Impacts of the Bakerloo Line Extension

6.40 The BLE will provide two or three[6] new stations along the Old Kent Road, and all will require construction sites for the building of the stations.

6.41 The arrival of the Bakerloo Line has the potential to catalyse transformational area change on the Old Kent Road. Comparative assessment of transport impact across all the stations shows the Old Kent Road as having the greatest accessibility increases as a result of BLE. Shifting journeys from the bus network to the underground will significantly enhance PTAL

[6] Including a Bricklayers Arms station

levels by improving journey times and increasing the reach of public transport, as well as reducing congestion on the road and enabling significant high-street re-development and improvement.

Place

6.42 The Old Kent Road Area Action Plan outlines the importance of the BLE for delivering on the significant development potential. To underpin this, Southwark are exploring the use of Grampian planning conditions which would prevent a large amount of development coming forward without commitment to the BLE.

Development Impact:

10,500 additional homes

59,900 sqm additional commercial space

6.43 As a result, the development impact of the BLE has been identified as 10,500 new homes and 59,900 sqm of new commercial space. This is over half of the Opportunity Area residential development capacity, making the BLE a crucial enabler for the area to meet its full potential.

Bricklayers Arms Station

Whilst we have analysed the local impacts of the BLE along the Old Kent Road using Option A (including the Bricklayers Arms site), the development impact at the Bricklayers Arms roundabout has been kept separate to highlight the additional impact of a station if it were to go ahead. Capacity testing identifies potential for around 308 homes on the site. Given the relatively small capacity, the people and economy impact of the BLE along the Old Kent Road would be similar with or without the station.

6.44 Alongside new homes and commercial space, the delivery of the BLE will significantly impact on the physical environment of the Old Kent Road. New stations will form part of mixed-use developments, providing new public realm and open spaces. Together with the shifting of transport modes from cars and buses to the underground, the creation of a greener, more attractive environment will dramatically improve the current poor air quality on the high street.

6.45 The AAP also identifies plans for new community assets on the Old Kent Road, such as a new health centre, FE college and new primary schools. Many of these assets are part of the Phase 2 developments that will only come forward with BLE delivery and will become more viable for delivery with the increased residential and commercial development associated with the BLE. These assets will provide much needed community infrastructure for currently deprived local communities.

Old Kent Road

6.46 As a result of these improvements, it is likely that the BLE would result in a significant uplift[7] to the currently low Healthy Streets score in the Old Kent Road area. An uplift of 20 points from a current average of 50 is readily achievable given the proposed wholescale adaptation of the

[7] Projected future scores would be dependent upon co-ordinated improvements around and between stations. A strategic review and approach to implementation would be needed to maximise an area's potential beyond the core BLE works.

transport corridor, including transformative improvements to its walking and cycling environment. This uplift assumes that traffic volumes will remain high, therefore the scoring has the potential to reach greater levels if there were a significant reduction in traffic and congestion due to the BLE. The success of developments adjacent to the Old Kent Road will also be a factor in creating more things to see and do as part of an active and attractive street environment.

Economy

6.47 The BLE has the potential to address the current weaknesses in the economic diversity and vitality of Old Kent Road, helping to secure new types of jobs and enhance demand for town centre services and amenities. Economic benefits of the BLE within the Old Kent Road area include:

1) **59,900 sqm additional commercial floorspace** brings capacity for **4,500 additional jobs**

2) Delivery of new commercial and residential development would support an average of **3,100 additional temporary construction jobs per annum.** The supply chain and multiplier benefits of this would result in a further **8,700 jobs per annum**

3) These construction jobs would lead to a **direct GVA uplift of £2.1 billion** and a **supply chain and induced GVA uplift of £3.6 billion**

4) As a result of new homes, **23,800 additional people** will be in the area spending money and supporting the local economy. This will result in **£682 million additional expenditure** by 2037

6.48 These impacts will help the town centre economy to become more resilient and evolve towards other uses, for example night-time economy uses which will support the economy outside normal hours. This is likely to occur through greater viability to maximise capacity within existing vacant space due to increased demand and town centre spend.

6.49 In addition, the types of uses and activities on the Old Kent Road are likely to change as the type of space changes. New development, transport connections, reputational improvements and an increasing workforce catchment due to the BLE will result in the development of new, higher value commercial spaces which are currently lacking in the area. As a result, the profile of jobs in the area is also likely to change. For example, the economy currently has a very low proportion of knowledge jobs. However, if the location quotient of the knowledge industries were to increase by 50% (still below Southwark average) due to the new space becoming available, this could result in around 800 additional, high value jobs in the area. In addition, new homes will support 9,900 additional skilled workers to live in the area.

People

6.50 The BLE will have significant benefits for the deprived communities living in and around the Old Kent Road. In particular, through improvements to public transport availability and accessibility, residents will be better connected to jobs and social opportunities across London. Development along the Old Kent Road will also provide new parks, leisure facilities, school infrastructure and a greener environment for local people.

6.51 As well as new access to employment opportunities across the capital, the BLE could provide employment opportunities to local residents. The Census shows that 16% of jobs in the borough are filled by Southwark residents. Applying this percentage to the additional 3,100 temporary construction jobs could mean an extra 490 jobs per annum for local residents in the borough. In addition, new commercial development around BLE stations could support 730 permanent local jobs in the area.

6.52 Given that Southwark has a large number of people on its housing waiting list, and the wards around the Old Kent Road are very deprived, with 33% of LSOAs in the most deprived 10% specifically for access to housing in the country, the development of affordable housing units is a significant potential impact of the BLE. 50% (5,250 units) of new homes associated with the BLE along the Old Kent Road will be affordable. Of the new social rented homes, 50% will be prioritised for local people on the housing register in the wards where the houses are built.

6.53 The nature of these benefits means there are wider social, health and wellbeing impacts for local people as a result of the BLE. Access to employment, as well as improvements to physical environment can have positive benefits for mental and physical health.

Summary of Impacts:

The Old Kent Road is currently undergoing transformational change and growth, and the BLE has a major role to play in unlocking this:

- ✓ **10,500** new homes
- ✓ **59,900 sqm** of new commercial space supporting **4,500** new jobs
- ✓ **3,100** additional temporary construction jobs per annum to build new development
- ✓ **£2.1bn** direct GVA uplift from construction of new commercial and residential space
- ✓ **23,800** additional people resulting in **£682m** additional spend to support the economy

Maximisation of Benefits and Mitigation of Adverse Impacts

- **Employment for local people –** there is potential for the jobs created through the construction of the new stations to go to local residents. Southwark Council should continue to work closely with TfL, developers and local business to support local people to access these construction jobs and the jobs that are supported within new commercial space around the stations.
- **Construction Impacts** – the construction sites located on the Old Kent Road will result in a number of adverse impacts to the area during the 6-year construction phase. Whilst detail on the construction activities, such as HGV movements, are not yet available, it is likely that this will result in increased congestion and air and noise pollution from construction traffic, as well as noise from construction activities. Mitigation strategies to reduce these impacts will be put in place by TfL in coordination with Southwark.
- **Business Displacement –** local businesses may be at risk of displacement due to the evolving economy of the Old Kent Road and changing profile of available space. Southwark should work proactively with local businesses to understand the risk factors of displacement (both direct and catalytic) and provide support where needed.
- **Community Integration –** Given the deprivation and diversity of the community around the Old Kent Road, there is a risk that major new development and population increase will negatively impact on community integration and development. It will be vital to ensure opportunities associated with the BLE are available to all and support the integration of the local community.

7. Local Operational Impacts: Lewisham

7.1 This chapter focuses on impacts relating to the construction and operation of the BLE within Lewisham: focusing on Borough wide impacts and impacts within each of the local station catchment areas.

7.2 Lewisham's BLE Corridor comprises a diverse collection of existing town centres which already benefit from a degree of rail accessibility. While the BLE will unlock extensive growth and development opportunities along the corridor, there are also constraints in terms of heritage, character and existing development.

Borough Impacts

7.3 Extending the Bakerloo line in Lewisham will result in the creation of five additional stations on the Underground network at New Cross Gate, Lewisham town centre, Ladywell, Catford Bridge and Lower Sydenham. As a result, the potential impact of the BLE on the borough is significant. It will help to unlock 7,200 new homes and 42,900 sqm of new commercial space, deliver jobs and increase transport accessibility and connectivity for residents. Whilst the overall development impacts are lower relative to the impacts seen in Southwark, there will be significant benefits in growth locations, such as Lower Sydenham.

7.4 The aggregated operational impacts of the BLE across the new stations in Lewisham are shown below. These impacts can be split into monetary impacts, covering economic, financial and land value benefits, and wider non-monetary benefits to society.

Monetary Impacts

1) Economic

7.5 The development of new commercial and residential space in Lewisham associated with the BLE will support new jobs in the borough. This is a result of both the construction of this space, and the new jobs supported in new commercial space. These new jobs have GVA impacts to the economy:

- Construction of new space will directly support around 2,100 jobs per annum, with a direct GVA impact of £1.4 billion and a supply chain impact of £2.5 billion
- 2,200 additional jobs will be supported in new commercial space in Lewisham, with a direct GVA impact of £744 million and a supply chain impact of £838 million

2) Land Value Uplift

7.6 Land value uplift is an increasingly important measure of the impacts of transport schemes. In this case it captures the increase in the value of land that results from improving transport provision. The BLE will significantly impact on residential and commercial land values in the catchment areas around the new stations in Lewisham, in terms of both existing properties and new development. This will predominantly impact the private housing market and will make home building and affordable housing around the stations more viable, supporting the Council to meet its housing targets.

7.7 Based on research, we have applied two uplift scenarios to capture a high growth and low growth impact. The resulting land value uplift impact for Lewisham is between £1.4 billion and £1.5 billion.

3) Financial

7.8 The BLE will result in a number of financial benefits for Lewisham. Additional commercial space can provide income to the council through the generation of business rates. Using

the average business rateable values, it is estimated that additional commercial space associated with the BLE could generate between £23-26 million in business rates income over a 10-year period.

7.9 In addition, new residential developments will result in higher council tax returns. In Lewisham, there is potential for an economic value equivalent to £81 million of council tax income over 10 years from the new homes associated with the BLE. The development of new homes also results in a number of other financial benefits for the borough, including an economic value of £50 million of New Homes Bonus and £24 million from the Community Infrastructure Levy which will support the delivery of new social infrastructure such as schools, health facilities and improved public realm.

Societal Non-Monetary Impacts

7.10 In addition to the impacts above, the BLE is likely to have a number of wider benefits for the communities of Lewisham:

- The BLE will increase the viability of schemes in the future, enabling a greater level of genuinely affordable homes to be delivered within developments, which will enable Lewisham Council to meet its housing need. Over a 10-year period, this could save Lewisham Council up to £35 million in temporary accommodation costs.
- Lewisham has areas with high levels of deprivation, particularly in the south of the borough. Improving connectivity through the BLE will increase access to employment and other social and leisure opportunities for these groups. Changes in fare structures, provided by access to oyster single fares on the BLE, will also increase the affordability of travel.
- Improved transport accessibility, reduced journey times and enhanced reputation due to the perception of 'being on the tube map' will support the town centres of the borough by increasing their workforce and visitor catchment. When coupled with the development of new commercial space, this could support local economies to diversify and become more resilient.
- The transformation of the national rail line south of Lewisham into a London Underground line will result in benefits associated with a high-frequency 'turn-up-and-go' service. This includes reputational enhancements as well as real and perceived frequency and accessibility improvements.

Snapshot of Lewisham Borough Findings:

- ✓ **7,200 additional homes** and **42,900 sqm** of additional commercial space
- ✓ Total GVA impact from construction of new development and jobs supported in this space **£5.5 bn**
- ✓ Land value uplift of up to **£1.4 - £1.5 bn**
- ✓ **£23-26m** economic value in business rates income from new commercial space
- ✓ **£81m** economic value of council tax income from new homes

Maximisation of Benefits and Mitigation of Adverse Impacts

7.11 It will be important for Lewisham to take proactive steps to ensure the BLE delivers maximum benefits for the borough, and that any potential adverse impacts are mitigated.

- **Employment for local people –** there is significant potential for the jobs created by the BLE to go to Lewisham residents. Lewisham is home to the main construction compound for the extension and will undergo major station developments and upgrades. The Council should continue to work closely with TfL, developers and local business to support local people to access these construction jobs and the jobs that are supported within new commercial space around the stations.
- **Land Value Increases** - as land values increase, house prices are likely to rise. This will result in financial benefit to owner-occupiers along the route; however, will have a negative impact on those in the private rented sector and those looking to move to the Corridor. To mitigate this, the council will need to take steps to increase the supply of affordable housing. To this end, land value increase will have the impact of increasing the viability of affordable housing provision within new development. Therefore, the increased quantum of housing delivered as a result of the BLE will also increase the quantum of affordable housing.
- **Business Displacement** - The development of new commercial space and the subsequent evolution of the economy may displace current businesses located in and around new station catchments. Independent businesses and those relying on lower value space are most likely to be at risk as rental values increase, existing sites are redeveloped, and the economy shifts to higher value employment. The role of Lewisham Council in mitigating against this impact through provision of affordable workspace, liaising with local businesses around their needs, and ensuring developers have a clear and deliverable strategy for the relocation of existing businesses (either in the new development or in other suitable premises) will be key.
- **Construction Impacts** – A significant proportion of the construction for the BLE will occur within Lewisham, with the potential for large disruption during the conversion of the Hayes national rail line and the creation of new stations. Whilst detailed information on the construction activities, such as HGV movements and tunnelling operations, are not yet available, it is likely that this will result in increased congestion and air and noise pollution from construction traffic, as well as noise from construction activities.

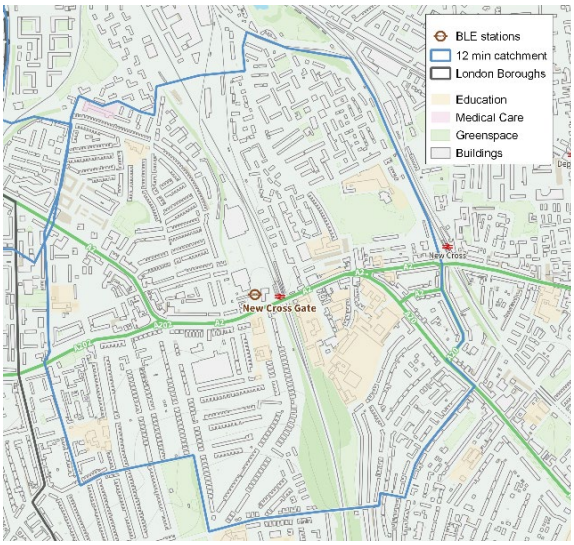
Local Impacts: New Cross Gate

Current Conditions

7.12 New Cross has a number of established Victorian residential neighbourhoods, many of which fall within conservation areas (southern side of New Cross Road and to the west of New Cross Gate station). Additionally, there is a vast number of existing socially owned homes as well as suburban enclaves of generally 2-3 storey houses and small blocks of flats.

7.13 Both historically and currently New Cross has shown high levels of deprivation. Affordable housing and workspace have attracted people with low incomes which contributes to the rich grassroots culture within the area. New Cross Road is diverse in nature and accommodates a range of food businesses and shops. It has a varied and active cultural offering and has a wealth of public houses and live music venues.

Figure 7.1 New Cross Gate's Catchment Area



7.14 There is a distinct economic contrast between the northern wards (New Cross and Evelyn) and the southern wards (Telegraph Hill and Brockley) of New Cross, which are also physically divided by the New Cross Road (the A2). In terms of employment, the largest sector is public admin, education and health, mainly due to the presence of Goldsmiths University, followed by the arts & culture sector and retail. This is the only area of the Corridor where the proportion of employment in high value sectors is the same as the London average, which is likely to be driven by the presence of Goldsmiths University. This also means there is a large student population in the area.

New Cross Gate town centre

New Cross Gate station

7.15 The table below gives an overview of the economic and social characteristics of the area. Cells highlighted in yellow suggest the metric is of particular importance to the area or is of interest (e.g. well above/below average).

	Character	Recent Change	Growth Trajectory (without BLE)
People	**Population 2017** 24,000 people	**Population Change 2012-17** − 3% increase in population	**Homes** Capacity for 6,800 homes (including the New Bermondsey development) **Commercial Space** Capacity for 5,800 sqm commercial space **Wider Aspirations** Evolution of the wider local area towards a strong creative economy, particularly with the CEZ and Innovation Corridor work. Creation of a more competitive, attractive location with better access and public realm, however growth is likely to be constrained by the capacity of the existing small station.
	Deprivation 2015 + 31% of LSOAs in 20% most deprived	**Change in Claimant Count 2014-19** = 1% decrease in the number of residents who are claimants	
	Claimant Count 2019 3.4% of 16-64 residents		
Economy	**Employment 2017** 6,700 jobs	**Employment Change 2012-17** = 14% increase in employment	
	High Value Sectors 2017 = 35% jobs in these sectors	**Business Change 2013-18** + 43% increase in the number of businesses	
	Business Size 2018* + 99.2% of businesses are small or micro		
Place	**Average House Price 2018** £419,375	**House Price Change 2013-18** + 82% increase	
	Commercial Values 2018	**Change in Commercial Values 2013-18**	
	Retail - £43 per sq. Ft. =	**Retail** - 181% increase +	
	Office – not available	**Office** - not available	
	Industrial - not available	**Industrial** – not available	
	PTAL values Average for station catchment = 5	**Recent investment in transport / public / community infrastructure** Recent works include the Route 1 regeneration and works to Deptford Station	
	Healthy Streets Score 51		
	Town Centre Vacancy Rate + 15%		

+	Above average
=	Similar to average (within +/- 10% of London average)
−	Below average

*+/- 1% of London average

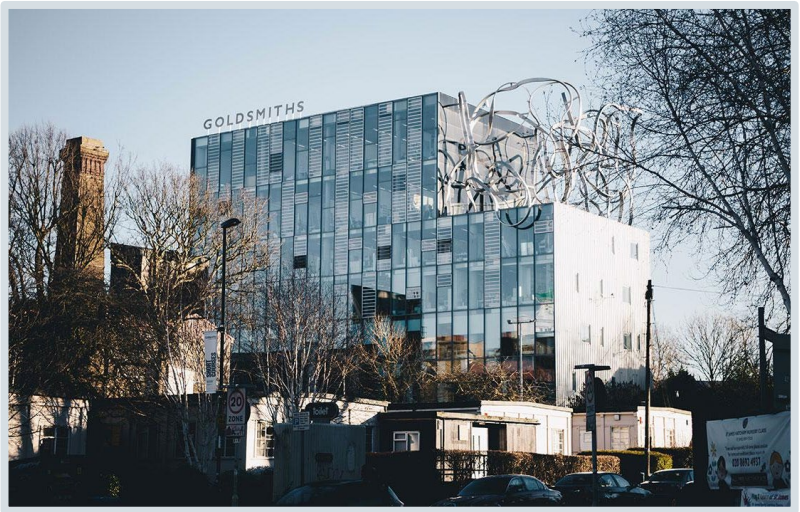
Place

7.16 Commercial and residential property values have experienced dramatic increases in recent years in New Cross. In particular retail rental values are now aligned with London averages, which may be a result of major development in the past such as the arrival of the London Overground.

Economy

7.17 New Cross Gate is defined by a prominence of small or micro businesses and a higher proportion of jobs in high value sectors than seen in London or the BLE Corridor. This

Goldsmiths University



concentration of high value activity is likely to be linked to the presence of Goldsmiths University which is located opposite New Cross Gate station. However, employment densities in the area are still low. The growth of creative businesses in the area and redevelopment of the station-adjacent sites present opportunities for employment intensification.

7.18 The last five years have seen particularly strong growth in the number of businesses in New Cross Gate. The current dominance of SMEs in the economy suggests that much of this growth has occurred as a result of favourable conditions for new small businesses to start-up and grow. According to Companies House data, the area experienced a start-up rate of 24% in 2018 compared to 19% across London.

7.19 The nearby New Cross and Deptford area was also recently designated as a Creative Enterprise Zone by the Mayor of London. This aims to support the creative sector through funding, skills training and the provision of affordable workspace. In addition, Goldsmiths University are developing an Enterprise Hub in the area to support new businesses.

People

7.20 Population growth in New Cross Gate has been slower than seen across the rest of London in recent years. Although 31% of LSOAs are in the top 20% most deprived in New Cross Gate, which is almost double the London average (16%), these levels are lower relative to other parts of the BLE Corridor.

Growth Trajectory (without BLE)

7.21 The potential to develop and improve the quality of the area around New Cross Gate Station is currently constrained by the small station which does not meet capacity needs and limited access. The severance caused by the existing north/south railway creates an east/west bottle-neck for highway traffic with the limited number of road bridges focused at station locations. The station environs also lack suitable provision for walking and cycling and generally has poor public realm. Going forward these challenges will become even more pronounced as the population grows.

7.22 Whilst it is possible that other nearby developments could be delivered in immediate vicinity of the station and broader area, the station congestion and poor local public realm affect the attractiveness and deliverability of area's full development potential. Redeveloping the sites either side of the station would be of benefit to the town centre as currently there is a large vacant site on the eastern side, and a large out of town retail style development to the west which does not integrate well with the rest of New Cross Gate.

7.23 Lewisham Council are also working with local people to improve housing in the area, such as the Achilles Street Estate Regeneration project which will go ahead after the resident ballot voted in favour of regeneration in November 2019.

Potential Local Impacts of the Bakerloo Line Extension

7.24 The extension of the Bakerloo Line into Lewisham will result in the development of a new station at New Cross Gate. The station site will also be used as the main construction site for the entire BLE construction phase.

7.25 The comparative transport assessment suggests that the extension of the Bakerloo Line through New Cross Gate will have a marginally lower impact in comparison to some other parts of the Corridor due to its already high PTAL rating. However, the BLE will still result in significant positive transport benefits associated with increased frequency and improved accessibility into central London, and additional station capacity to address current overcrowding issues. In addition, providing a connection with the overground station already at New Cross Gate will deliver interchange benefits for those using the BLE.

Place

7.26 The BLE will support the continued evolution of New Cross Gate into a more attractive and competitive place to live and work in south London. The potential development impact arising from the arrival of the BLE to the area around the station is anticipated to be 1,000 new homes. While the BLE is likely to contribute to most new development in the area, it is estimated that it will deliver an additional windfall of 1,000 new homes, up to 500 of which will be affordable. By increasing local land values, the BLE will increase the achievability of affordable housing targets on all new development in the area.

Development Impact:

1,000 additional homes

7.27 In addition, the extension of the Bakerloo line into New Cross Gate will enable significant improvements to public realm and the physical environment around the station. Delivery of the BLE would be likely to involve the replacement of the existing constrained and not-fit-for-purpose station with a brand new, mixed-use station development. This will include the provision of a fully accessible station, alongside new public realm, junction improvements and safer wayfinding/access for pedestrians. This is likely to impact on the perceptions and first impressions of the area.

7.28 As a result of these improvements and the arrival of the BLE, the Healthy Streets score for the area is likely to increase. Small-scale improvements could be made such as improved crossings and signalling technology, and some provision for segregated cycling. There has also already been some work to masterplan improved crossings and access into sites by the station. However, transformational changes to the Healthy Streets score will depend heavily on the successful integration of sustainable transport opportunities with surrounding development sites.

Economy

7.29 The BLE will support the continued development of the local economy around New Cross Gate. The intensification and evolution of space as a result of the BLE will support the diversification of the economy and increase the resilience of the town centre. This will be further supported by the population increase associated with new homes. Therefore, the economic benefits within the New Cross Gate area include:

1) Delivery of new residential development would support an average of **300 additional temporary construction jobs per annum.** The supply chain and multiplier benefits of this would result in a further **800 jobs per annum**

2) These construction jobs would lead to a **direct GVA uplift of £200 million** and a **supply chain and induced GVA uplift of £343 million**

3) As a result of new homes, **2,400 additional people** will be in the area spending money and supporting the local economy. This will result in **£14 million additional expenditure** per annum by 2037

7.30 These benefits will have a major impact on the future and competitiveness of the town centre in New Cross Gate. Currently there is significant capacity within existing town centre space, evidenced by high vacancy rates. However, increased accessibility, demand and town centre spend, as well as an evolution of uses, will enhance the viability to maximise capacity within existing space. A lower vacancy rate will ultimately result in an uplift to town centre footfall also.

7.31 The intensification of uses and an evolving economy is likely to support the growth of the already established knowledge industries in the area, and provide the space needed to meet the aspirations of the nearby Creative Enterprise Zone. Anchor institutions involved in the development of the area, such as Goldsmiths, will also have greater potential to maximise their assets and value to the local economy as a result. If this evolution were to lead to an even greater concentration of knowledge industries (e.g. the LQ was to increase by 50%) due to the changing profile of space, this could result in around 1,170 additional, high value jobs in the area. In addition, new homes will support 1,000 additional skilled workers to live in the area.

7.32 Whilst institutions such as Goldsmiths are likely to benefit, smaller businesses in the creative industries will need support to ensure they have access to the affordable workspace that they need to be able to stay in the area and capitalise on these benefits.

People

7.33 The BLE will provide opportunities for the communities living in and around the catchment area. Inclusion onto the underground network will better connect residents to jobs, services and other opportunities in the region, and will reduce journey times into central London. For those residents who are unemployed or living in pockets of deprivation across the area, this will enable increased access to potential employment, skills and training opportunities.

7.34 In addition, the BLE will create local job opportunities through the construction of new homes which could be available to local people. For example, if strategies are in place to maximise local apprenticeship and skills trainings benefits as part of BLE construction, this could provide new pathways into work in the area. The census shows that 39% of jobs in the area are filled by Lewisham residents. Applying this percentage to the additional 300 temporary construction jobs in the area could mean an extra 110 jobs per annum for local residents in the borough.

7.35 Whilst the jobs benefits associated with the construction of the BLE has been captured in Chapter 5, it is likely that many of these temporary construction jobs will be in New Cross Gate given the location of the main work site next to the station.

7.36 Notwithstanding the fact that house prices are rising throughout London, the BLE will add an additional increase to house prices and will see New Cross Gate become a more competitive place. As prices rise, the amount of affordable housing that schemes can deliver will increase because viability increases. As c. 1000 homes are expected to be delivered as a result of the BLE, it can be assumed that (and as policy requires) 50% of those homes would be affordable homes. The increase in delivery of affordable homes in the area and will help to address the housing deprivation in the area: currently 62% of LSOAs are in the most deprived areas for access to housing in the country.

7.37 The nature of these benefits means there are wider social, health and wellbeing impacts for local people as a result of the BLE. This refers to the impact on individuals' quality of life, health, happiness, sense of belonging and community etc. Access to employment associated with the BLE, as well as improvements to physical environment can have positive benefits for mental and physical health.

Summary of Impacts:

New Cross Gate is rapidly becoming a more attractive, competitive place to live and work. The BLE will be key to ensuring this is realised:

- ✓ **1,000** new homes
- ✓ **300** additional temporary construction jobs per annum to build new development
- ✓ **£200m** direct GVA uplift from construction of new residential space
- ✓ **2,400** additional people resulting in **£68m** additional spend to support the economy

Maximisation of Benefits and Mitigation of Adverse Impacts

- **Construction Impacts -** The main construction site for the extension is located in New Cross Gate. This will result in adverse impacts to the area during the 6-year construction phase in a number of ways:
  - High levels of construction activity on the site: whilst detailed information on the construction activities, such as HGV movements and tunnelling operations, are not yet available, it is likely that this will result in increased congestion and air and noise pollution from construction traffic, as well as noise from construction activities. TfL will need to develop construction management plans in such a way as to mitigate these impacts, for example using zero emissions vehicle fleets and planning timings of operations on the site to minimise disruption to residents.
  - Impact on place and public realm: a large construction site in the town centre will have a visual impact and will reduce accessibility as it blocks a cut-through to the town centre from the north-west. It could also reduce pedestrian safety due to the increased presence of construction traffic.
- **Local Construction Jobs -** there is significant potential for the jobs at the main construction compound to go to local people in New Cross Gate. The Council should continue to lobby and work closely with TfL, developers and local business to support local people to access these construction jobs.

7.38 **Loss of businesses –** Similarly to the other stations, there is a risk that businesses will be displaced by the BLE due to the changing price, profile and availability of space. Additionally, New Cross Gate is one of the only areas where there will be a direct, temporary loss of businesses during the construction of the BLE: there is currently a Sainsbury's located on the retail site which will be the main construction site, and the store will have to close for the construction period. This could result in a temporary loss of jobs (in the order of 200 FTE jobs) which would have negative impacts to the local economy. Therefore, TfL should ensure continued access to a large grocery store for local residents and work with the Council to protect local jobs. This could include providing free transport to other supermarkets in neighbouring areas or seeking alternative sites for a temporary store.

Local Impacts: Lewisham Town Centre

Current Conditions

7.39 Lewisham is an existing town centre with an aspiration to become a Metropolitan town centre. It is the borough's principal shopping destination, attracting customers from a large catchment area with a wide choice of shops and services and a very successful street market.

7.40 Lewisham station has been designated as a Strategic Interchange and currently is made up of two stations adjacent to each other, one for the national rail services and the other for the DLR. The town's bus stand sits adjacent to the station on Thurston Road.

7.41 There has been significant development within Lewisham town centre since the mid-2000s, when sites along Connington Road were redeveloped. Since that time new developments on Loampit Vale, Lewisham Gateway, Thurston Road and Heathside and Lethbridge have been built providing the town centre with a new leisure centre, new homes and a new road layout close to the station. Much of this development has been in anticipation of the Bakerloo Line, and many of the sites identified within the Lewisham Town Centre Local Plan have already been built or have planning permission.

Figure 7.2 Lewisham Town Centre Catchment Area

Lewisham Bus Station

7.42 The table below gives an overview of the economic and social characteristics of the area. Cells highlighted in yellow suggest the metric is of particular importance to the area or is of interest (e.g. well above/below average).

	Character	Recent Change	Growth Trajectory (without BLE)
People	**Population 2017** 19,100 people	**Population Change 2012-17** + 20% increase in population	**Homes** Capacity for 5,200 homes **Commercial Space** Capacity for 46,000 sqm commercial space **Wider Aspirations** Regeneration of Lewisham shopping centre (although this is likely to be dependent on BLE land value uplift)
	Deprivation 2015 = 13% of LSOAs in 20% most deprived	**Change in Claimant Count 2014-19** + 8% increase in the number of residents who are claimants	
	Claimant Count 2019 2.9% of 16-64 residents		
Economy	**Employment 2017** 7,300 jobs	**Employment Change 2012-17** + 20% increase in employment	
	High Value Sectors 2017 − 10% jobs in these sectors	**Business Change 2013-18** + 45% increase in the number of businesses	
	Business Size 2018* = 99.0% of businesses are small or micro		
Place	**Average House Price 2018** − £388,427	**House Price Change 2013-18** + 68% increase	
	Commercial Values 2018	**Change in Commercial Values 2013-18**	
	Retail - £34 per sq. Ft. −	**Retail** - 13% increase −	
	Office - £25 per sq. Ft. −	**Office** - 119% increase** +	
	Industrial - not available	**Industrial** – not available	
	PTAL values Average for station catchment = 6a	**Recent investment in transport / public / community infrastructure** Lewisham Gateway masterplan with major public realm and high street upgrades, Glass Mill leisure centre	
	Healthy Streets Score + 60		
	Town Centre Vacancy Rate 7.5%		

*+/- 1% of London average
** large increase likely driven by limited data

+	Above average
=	Similar to average (within +/- 10% of London average)
−	Below average

Place

7.43 According to the Healthy Streets assessment, Lewisham town centre has the highest score of all the catchment areas in the Corridor. This is predominantly driven by the prevalence of 'things to see and do' in the town centre and pedestrian infrastructure. However, the station does cause a barrier to movement in the town centre and there are issues with how the station is accessed.

7.44 Work has been undertaken to remove the roundabout close to the station to ensure that pedestrians can walk more easily from the station to the town centre. The 'low h' style junction means now means pedestrians cross one road rather than 3 when making this journey. New developments around the station have provided improved public realm and connections, and schemes which are not yet built will improve this further. However, Lewisham Shopping Centre remains a barrier to movement across the town centre.

7.45 Whilst the station PTAL value in Lewisham is high, this tends to only indicate frequency and availability of services from Lewisham station and does not account for journey time into central London. This can be considered relatively higher given the proximity. Therefore, despite a high PTAL value, Lewisham town centre residents can struggle with poorer connectivity than more central locations with an equivalent PTAL rating. In addition, the

existing station, which suffers from high levels of overcrowding, is not cohesive or legible in its design, and is poorly integrated with the DLR and the town centre.

7.46 Commercial property markets in Lewisham town centre are currently performing below London averages, similarly to many other parts of the Corridor. This could suggest that the struggles of the high street are not offset by addition of new population in Lewisham town centre, and/or that the retail environment is not sufficiently attractive. However, rapid growth in recent years (also seen in residential values) may be a result of new development that has come forward or a trend towards a more competitive economy.

Economy

7.47 As a town centre location, Lewisham is predominantly characterised by an economy which supports a significant number of jobs; however, those jobs tend to be in lower value sectors, such as retail, public admin and hospitality and leisure. Across the catchment only 10% of jobs are in higher value sectors, which is well below both the London (32%) and Corridor (16%) averages.

7.48 In recent years, there has been strong population and business growth in the area, suggesting Lewisham town centre is becoming an increasingly attractive location to work and do business.

People

7.49 Lewisham town centre has experienced the highest population growth rate (20%) in the Corridor in recent years as a result of growth in the town centre. This level of growth is over three times the London and Corridor averages, which are both around 6%. Growth has been driven by high density redevelopment of big box retail sites around the station, the market for which has been strongly supported by the easy access to Canary Wharf on the DLR and other central London commuter services. This has meant that population density levels in Lewisham town centre are now similar to Inner London levels.

7.50 Alongside rapid population growth there has been a strong increase in the number of claimants. Whilst there may be many contributing factors to this trend, it could suggest that the local economy is struggling to support such a rapidly growing population. This also suggests that the creation of easily accessible, lower-skilled jobs in the local economy is desirable to support local people into employment. Although deprivation and poverty exist in the area, Lewisham town centre is the only catchment in the Corridor which has deprivation levels in line with the London average.

Growth Trajectory (without BLE)

7.51 The potential for the development of new homes in Lewisham town centre (without BLE) is substantial, with over 5,200 units coming forward across a number of different sites in the catchment. However, a major risk for the delivery of these new homes is that the transport network will have insufficient capacity to accommodate growth, with Lewisham Station and the services running through it (particularly towards central London) being unable to cope with future demand.

7.52 While a station upgrade for the existing station is being planned by Network Rail, an increase in service capacity will be needed to ensure that existing housing capacity can be delivered without overwhelming the local rail network.

7.53 There is significant potential to unify all the rail infrastructure in Lewisham town centre through the creation of a new station, wayfinding and public realm designs. Making major improvements to the design and functionality of the station will create an improved arrival point to Lewisham Town Centre. However, Lewisham Shopping Centre is still an obstacle

to a more permeable route between the Station and adjacent tower blocks and the town centre. This is preventing the town centre from becoming a thriving location, and makes it a less attractive place to work, live and visit. To achieve Metropolitan town centre status, a comprehensive redevelopment of the shopping centre is necessary to encourage significantly increased footfall levels. Achieving this is likely to require increased land values, increased connectivity (and catchment area), and an improved quality of arrival, particularly given the current challenges facing town centres across London and the country.

Potential Local Impacts of the Bakerloo Line Extension

7.54 A new Bakerloo Line station in Lewisham town centre forms part of plans for major development in and around Lewisham station. This will include improved access and interchange between national rail, London Overground, DLR and the new Bakerloo Line.

7.55 Similarly, to New Cross Gate, the comparative transport assessment suggests that the BLE will have a marginally lower impact in Lewisham town centre in comparison to some other parts of the Corridor due to its already relatively high levels of connectivity. However, the BLE will result in significant positive transport benefits associated with increased frequency and capacity, and improved accessibility into central London. It will also deliver interchange benefits between lines at the station, making Lewisham town centre more of a focal point in the borough.

Place

7.56 The extension of the Bakerloo Line into Lewisham town centre will support the delivery of new development around the station. It will provide additional capacity and connectivity to ensure the delivery of the 5,200 homes already planned in the area. Lewisham town centre has potential for significant further residential and commercial development, and the BLE will unlock an additional 1,300 new homes and 17,600 sqm of commercial space.

Development Impact:

1,300 additional homes

17,600 sqm additional commercial space

7.57 The delivery of the BLE will also result in improvements to public realm and the town centre environment through an improved 'place' reputation associated with an upgraded passenger interchange, increased footfall, and the development of a major new station. This will be mixed use with commercial and residential space provided, as well as improvements to bus, taxi and cycling facilities. As a result of these improvements, it is likely the Healthy Streets score could increase from 60 towards the 70 mark.

Economy

7.58 The BLE will support the development of the local economy in Lewisham town centre. The intensification and evolution of space as a result of the BLE will support the diversification of the economy and increase the resilience of the town centre. This will be further supported by the population increase associated with new homes. Therefore, the economic benefits within the Lewisham town centre area include:

1) **17,600 sqm additional commercial floorspace** brings capacity for **900 additional jobs**

2) Delivery of new residential and commercial development would support an average of **400 additional temporary construction jobs per annum.** The supply chain and multiplier benefits of this would result in a further **1,100 jobs per annum**

3) These construction jobs would lead to a **direct GVA uplift of £276 million** and a **supply chain and induced GVA uplift of £474 million**

4) As a result of new homes, **3,000 additional people** will be in the area spending money and supporting the local economy. This will result in **£17 million additional expenditure** per annum by 2037

7.59 These benefits are likely to have a significant impact on Lewisham's economy and support efforts to increase the size and significance of the town centre economy. Currently, Lewisham town centre is strongly characterised by town centre and retail uses. As national pressures on town centres increase (such as declining footfall, rising business rates etc), the ability for local economies to diversify will be key. The BLE will enable Lewisham town centre to become more resilient as the economy evolves towards other uses, such as the night-time economy (particularly if the BLE were to incorporate the night tube). The aspiration for Lewisham town centre to achieve Metropolitan status means it also needs significantly more retail, entertainment and food and beverage uses.

7.60 Lewisham town centre currently has a higher than London average town centre vacancy rate, and therefore there is an opportunity to maximise capacity within existing space. The BLE will make the intensification and evolution of this space more viable due to the increased demand and town centre spend. There is also likely to be significant uplift to footfall and town centre vitality through the development of a new town centre and shopping centre, particularly through wayfinding and public realm improvements.

7.61 In addition, the development of new high-grade commercial space and increased connectivity and accessibility through the new station will make Lewisham town centre a more attractive place to work and invest. Whilst it is important that Lewisham maintains a mix of higher and lower-skilled jobs to support a diverse economy which is accessible to local people, the changing profile of space could support additional high value jobs and enterprise in the area helping Lewisham to become more competitive. If the proportion of knowledge jobs were to increase to 50%, this could result in around 300 additional knowledge jobs in the area. In addition, new homes will support 1,200 additional skilled workers to live in the area.

People

Lewisham town centre

7.62 The BLE will provide a number of opportunities for the communities living in and around the catchment area. Direct access to the underground network will better connect residents to jobs, services and other opportunities in the region, and will reduce journey times into central London.

7.63 In addition, the BLE will provide employment opportunities to local residents through the construction of new commercial and residential space. Applying the percentage of jobs in Lewisham taken by Lewisham residents (39%) to the 400 additional temporary construction jobs could mean an extra 160 jobs per annum for local residents in the borough. Applying the same logic, jobs created within the new commercial development could result in 340 permanent local jobs in the area.

7.64 House prices have already increased rapidly in Lewisham town centre in recent years (+68%). Future increases in land values associated with the BLE, while helping to increase the overall quantum of housing delivery, does have the potential to make the area an increasingly unaffordable place to live for many local residents. As a result, the delivery of affordable homes within the residential development associated with the BLE will be an important impact for local communities (650 units). Whilst housing deprivation in the area is lower relative to other parts of the corridor, this will still help to address the 25% of LSOAs in the Lewisham town centre catchment which are in the most deprived areas for access to housing in the country.

Summary of Impacts:

Lewisham town centre is at the heart of the borough and is undergoing significant change, especially around the station area. The BLE is a major part of this and in the future will bring:

- ✓ **1,300** new homes
- ✓ **17,600 sqm** of new commercial space supporting **900** new jobs
- ✓ **400** additional temporary construction jobs per annum to build new development
- ✓ **£276m** direct GVA uplift from construction of new residential space
- ✓ **3,000** additional people resulting in **£86m** additional spend to support the economy

Mitigation of Adverse Impacts

- **Construction Impacts –** whilst there are not any major BLE work sites located directly within Lewisham town centre, there is likely to be some disruption and adverse impacts associated with the building of a new station over the current bus stand, and the construction of the ventilation shaft and tunnel portal (both located just outside the Lewisham town centre catchment). Increased congestion and air and noise pollution from construction traffic, as well as noise from construction activities, are likely to be the main negative impacts. It will be essential for Lewisham Council to minimise the disruption to Lewisham town centre to secure the continued function and attractiveness of the town centre.
- **Relocation of the bus stand –** relocating a bus stand and bus routes could cause significant disruption to local accessibility. TfL will need to work closely with the Council to minimise disruption and ensure appropriate mitigation measures are in place. In addition, construction on the current bus stand will have negative impacts on those living close by given the high density of development next door.

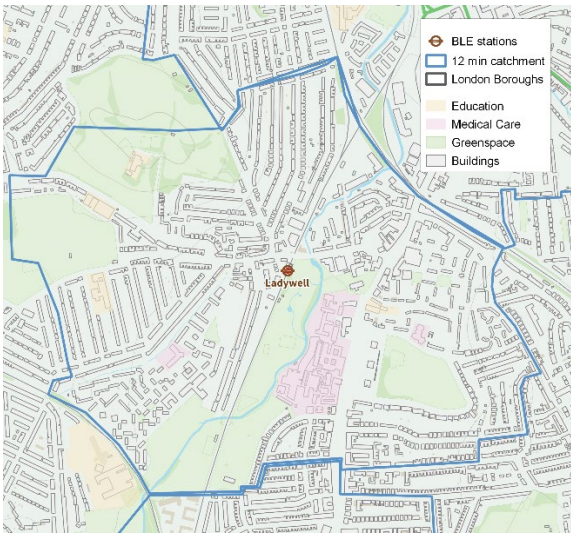
Local Impacts: Ladywell

Current Conditions

7.65 Ladywell is a village dating back to the 15th century. The main shopping areas are on Ladywell Road and Vicars Hill, and the majority of development has grown around the railway station. However, there remain some vacant buildings and disused sites along Ladywell Road. The area is less dense than Lewisham town centre and has more greenspace, such as Ladywell Fields located to the south of Ladywell Road. Ladywell Fields and the railway lines form its eastern and southern boundaries.

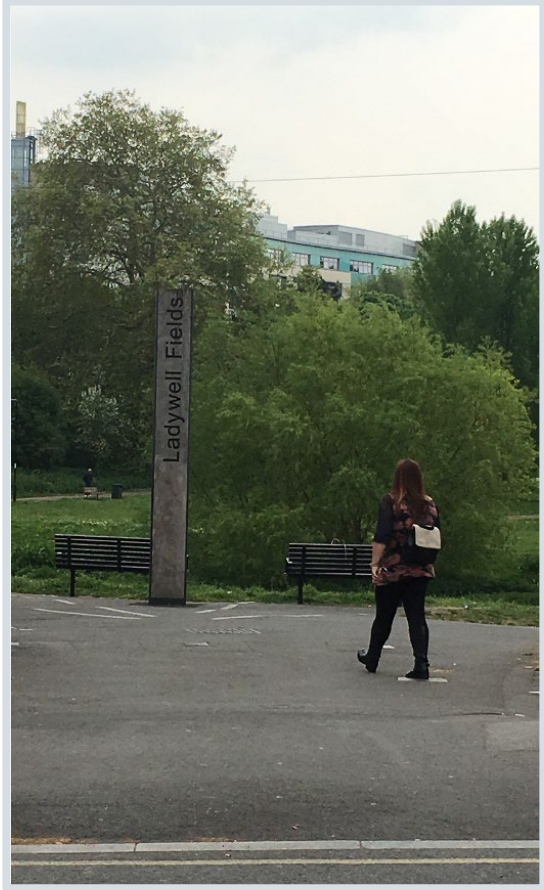
7.66 Ladywell is a varied neighbourhood with a generally consistent Victorian character. It has a low population density and is predominantly residential.

Figure 7.3 Ladywell's Catchment Area



Ladywell Road

Ladywell Station



Ladywell Fields

7.67 The table below gives an overview of the economic and social characteristics of the area. Cells highlighted in yellow suggest the metric is of particular importance to the area or is of interest (e.g. well above/below average).

	Character	Recent Change	Growth Trajectory (without BLE)
People	**Population 2017** 13,800 people	**Population Change 2012-17** − 4% increase in population	**Homes** Capacity for 340 homes **Commercial Space** Capacity for 3,200 sqm commercial space **Wider Aspirations** Limited
	Deprivation 2015 + 22% of LSOAs in 20% most deprived	**Change in Claimant Count 2014-19** − 4% decrease in the number of residents who are claimants	
	Claimant Count 2019 3.6% of 16-64 residents		
Economy	**Employment 2017** 7,800 jobs	**Employment Change 2012-17** − 10% decrease in employment	
	High Value Sectors 2017 − 4% jobs in these sectors	**Business Change 2013-18** + 42% increase in the number of businesses	
	Business Size 2018* + 100.0% of businesses are small or micro		
Place	**Average House Price 2018** − £323,500	**House Price Change 2013-18** + 83% increase	
	Commercial Values 2018	**Change in Commercial Values 2013-18**	
	Retail - £19 per sq. Ft. −	**Retail** - 3% decrease −	
	Office - £11 per sq. Ft. −	**Office** - not available	
	Industrial - £8 per sq. Ft.	**Industrial** – 21% increase −	
	PTAL values Average for station catchment = 4	**Recent investment in transport / public / community infrastructure** Place Ladywell – temporary accommodation as a meanwhile use	
	Healthy Streets Score 51		
	Town Centre Vacancy Rate + Not Available		

+	Above average
=	Similar to average (within +/- 10% of London average)
−	Below average

*+/- 1% of London average

Place

7.68 Ladywell has a strong village identity and its centre focuses around the station. Whilst still below the London average, house prices have experienced rapid growth to reach current levels. PTAL levels in Ladywell are currently average for London, whilst it is well connected on the National Rail Hayes line, the frequency and reach of services is lower than town centres in the north of the borough, such as Lewisham and New Cross Gate.

Economy

7.69 The economy is characterised by high job density, but a dominance of jobs in sectors which are not commonly supportive of higher value employment, such as public admin, education, health and retail sectors. The biggest employment sources are Lewisham hospital and the Council's Wearside depot. All the businesses in the area are small or micro.

7.70 Whilst there has been significant growth in the number of businesses (+43%), there has been a 10% decrease in employment in Ladywell in recent years. This is due to the dominance of small and micro businesses in the economy, the reduction in jobs in local public sector organisations including the Council and NHS, and the loss of a few employers. It is also likely to be due to a decrease in the amount of employment floorspace in Ladywell.

Place Ladywell

People

7.71 In recent years, Ladywell has experienced a decrease in the number of residents who are claimants. This is the largest decrease of any catchment in the Corridor. However, the proportion of claimants in Ladywell is still currently higher than the London average.

7.72 Deprivation levels are also lower in Ladywell than across the rest of the Corridor, however the number of LSOAs in the top 20% most deprived is still in line with the national average.

Growth Trajectory (without BLE)

7.73 Despite a below average population density, going forward there is minimal opportunity for housing development in the area. Ladywell is already very well developed, and site capacity testing has only identified the potential for 340 new homes without the BLE. One of these sites is the planned restoration of the Ladywell Playtower, which will include the provision of a cinema.

Potential Local Impacts of the Bakerloo Line Extension

7.74 The extension of the Bakerloo Line into Ladywell will result in the conversion of the national rail station into a London Underground station.

7.75 Whilst the PTAL rating is relatively low in Ladywell, the comparative transport assessment suggests that the transport impact of the BLE will not be quite as high as some other locations, such as the Old Kent Road. This is because the BLE will be replacing an existing national rail service. The arrival of the Bakerloo Line will, however, quadruple service frequencies, increase capacity, reduce journey times and provide more direct connections to most destinations in London. There are also positive perception benefits associated inclusion onto the London Underground network.

Place

7.76 Due to the well-developed nature of the area around Ladywell station, there is limited potential for further development and for the BLE to have a development impact. Capacity testing identifies there could only be around 250 additional homes as a result of the BLE.

Development Impact:
250 additional homes

7.77 However, the BLE will strengthen Ladywell as a place. Currently, accessibility to the station is an issue in Ladywell, with routes to and from the existing station limited and interchange

with other public transport poor. There is also a poor walking environment to the east with limited crossing availability, and no cycling provision. The BLE will support an upgrade to current station as a result of inclusion onto the underground network. This will include step-free access and gated access, as well as public realm upgrades. It will be important to ensure high quality access is maintained both to the town centre and to Ladywell Fields and the hospital. However, given that the station is located on a constrained site, there will be limited opportunity for major transformation. There is some potential to improve the healthy streets scoring by at least 10 points to beyond 60; however, this will predominantly be achieved by targeting gateways to the existing/new station and to the popular Ladywell Fields park to the east.

Economy

7.78 Given the limited potential for significant development around the station, the BLE will have a smaller impact on the local economy in Ladywell than seen in other stations. However, the development of new homes will result in the creation of jobs and additional expenditure for the local area. The economic benefits within Ladywell include:

1) Delivery of new residential development would support an average of **70 additional temporary construction jobs per annum.** The supply chain and multiplier benefits of this would result in a further **200 jobs per annum**

2) These construction jobs would lead to a **direct GVA uplift of £48 million** and a **supply chain and induced GVA uplift of £82 million**

3) As a result of new homes, **600 additional people** will be in the area spending money and supporting the local economy. This will result in **£3.2 million additional expenditure** per annum by 2037

7.79 Information on the current performance of Ladywell economy is limited due to its small size, and whilst there may be some headroom within current space for intensification, a town centre vacancy rate is not available to confirm this. The restricted potential for new development in the area also suggests that the economy is unlikely to experience a major shift as a result of the BLE.

7.80 Nevertheless, improved access into central London is likely to increase the viability of the local economy. Inclusion into the underground network results in significant improvement to the predictability of rail services, improved local confidence in public transport and an improved perception of the transport offer in an area as a result. This impact on Ladywell could contribute to the area becoming a more attractive place to live and work.

People

7.81 Improving the accessibility into central London, and increasing the reach of public transport, will better connect local residents to jobs and leisure opportunities across the city. The BLE will also enable new job opportunities in the local area around Ladywell through the construction of new homes. Applying the percentage of Lewisham jobs taken by Lewisham residents (39%) to the 70 additional temporary construction jobs could mean an extra 30 jobs per annum for local residents in the borough.

7.82 Whilst Ladywell is less deprived than other station catchments in the Corridor, declining employment in recent years suggests that this opportunity to provide new jobs in the local area is important for the continued vitality of the local economy. The development of new homes in Ladywell as a result of the BLE will also provide affordable housing for the area. Housing deprivation in Ladywell is much lower relative to other parts of the corridor, however 50% affordable homes (125 units) will still help to address the local and borough-wide need for affordable homes.

Summary of Impacts:

Ladywell is already well developed and unlikely to experience significant change as a result of the BLE, however the area will experience a number of impacts:

- ✓ **250** new homes
- ✓ **70** additional temporary construction jobs per annum to build new development
- ✓ **£48m** direct GVA uplift from construction of new commercial and residential space
- ✓ **600** additional people resulting in **£16m** additional spend to support the economy

Maximisation of Benefits and Mitigation of Adverse Impacts

- **Disruption to the Provision of Council Services –** the tunnel portal for the BLE is planned for the Wearside Depot site south of Lewisham station. This site is currently used as the service centre for the borough's commercial waste and recycling services, which will have to be re-located. Whilst Lewisham is working to find an alternative site for the Lewisham Service Centre, it is likely that this move will cause some disruption. There are also likely to be noise and traffic impacts associated with the construction and construction traffic.
- **Construction Impacts –** the construction of the BLE is very likely to result in the closure of the Hayes national rail line for a period of time in order to complete the upgrade work. However, the nearby Lewisham and Catford stations will help to reduce any potential adverse impact. It will be important to engage with local businesses to ensure any disruption is being minimised.

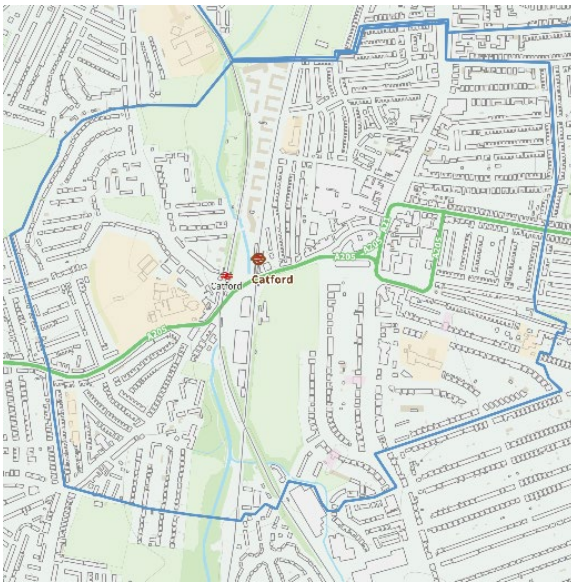
Wearside Depot

Local Impacts: Catford

Current Conditions

7.83 Catford town centre is the second largest centre in the borough and provides a wide range of services to borough residents and a more local shopping offer. It plays an important role as the civic and entertainment centre, attracting visitors across the borough and beyond. Catford is home to the Lewisham Council offices.

Figure 7.4 Catford Bridge's Catchment Area



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Catford Station

7.84 The table below gives an overview of the economic and social characteristics of the area. Cells highlighted in yellow suggest the metric is of particular importance to the area or is of interest (e.g. well above/below average).

	Character	Recent Change	Growth Trajectory (without BLE)
People	**Population 2017** 15,800 people	**Population Change 2012-17** + 10% increase in population	**Homes** Capacity for 3,600 homes
	Deprivation 2015 + 50% of LSOAs in 20% most deprived	+ **Change in Claimant Count 2014-19** 7% increase in the number of residents who are claimants	**Commercial Space** Capacity for 17,300 sqm commercial space
	Claimant Count 2019 4.3% of 16-64 residents		**Wider Aspirations** New masterplan for the town centre
Economy	**Employment 2017** 4,700 jobs	**Employment Change 2012-17** – 10% decrease in employment	
	High Value Sectors 2017 – 7% jobs in these sectors	= **Business Change 2013-18** 36% increase in the number of businesses	
	Business Size 2018* – 96.7% of businesses are small or micro		
Place	**Average House Price 2018** – £418,250	**House Price Change 2013-18** + 93% increase	
	Commercial Values 2018	**Change in Commercial Values 2013-18**	
	Retail - £20 per sq. Ft. –	**Retail** - 36% increase +	
	Office - £26 per sq. Ft. –	**Office** - 83% increase	
	Industrial - £13 per sq. Ft. =	**Industrial** – 48% increase –	
	PTAL values Average for station catchment = 4	**Recent investment in transport / public / community infrastructure** Awarded HIF funding to re-route the south circular	
	Healthy Streets Score + 49		
	Town Centre Vacancy Rate 8.5%		

+	Above average
=	Similar to average (within +/- 10% of London average)
–	Below average

*+/- 1% of London average

Place

7.85 Catford is a major town centre and civic centre. Its characterised by 'big box' retail and more traditional high street retailers than other station catchment areas in Lewisham. The public realm is dominated by the South Circular/A21 gyratory junction.

Catford Town Centre

7.86 Catford was assessed as having a relatively poor Healthy Streets score. This is predominantly a result of the south circular which runs past the station and straight through the town centre. As a result, Catford suffers from very high volumes of traffic congestion leading to

high levels of noise and air pollution. There is also a lack of places to cross the street and poor cycling infrastructure, making the area inaccessible.

Economy

7.87 Employment in Catford is dominated by the public admin, education and health sectors, primarily due to administration of the Lewisham Council offices in the town centre. Other major employment sectors include retail, business support services and financial and professional services, with a low proportion of jobs in high value sectors, such as digital and creative. However, initiatives such as Catford Dek, which is located in the Old Town Hall provide much needed affordable, flexible and creative studio and co-working space for artists and designers in the borough.

7.88 In recent years, Catford has experienced strong population growth, creating opportunities for the town centre economy. This was partly due to the delivery of a large residential development to the north of the station known as Catford Green. Over the past few years, there has also been a large increase in the number of claimants amongst residents, and a decrease in employment levels potentially linked to the reduction in the headcount at the various public sector employers. Whilst this may be a result of increases in the number of small businesses and the loss of a major employer, wider evidence indicates that Catford's economy is struggling to provide opportunities for its growing population.

People

7.89 Levels of deprivation rapidly increase when moving south through the BLE Corridor from Lewisham/Ladywell into Catford. 50% of LSOAs are in the top 20% most deprived nationally, which is closer to levels seen in Elephant and Castle and the Old Kent Road.

7.90 Strong increases in house prices in recent years mean that the average house price in Catford is now significantly higher than in any other catchment in the south of the Corridor, perhaps reflecting the relatively better transport connections. When coupled with high levels of deprivation and low average household incomes in the area, this suggests that Catford is becoming an increasingly unaffordable place for certain sections of society and that those on low incomes are less likely to be able to access market rate housing.

Growth Trajectory (without BLE)

7.91 The development of a masterplan for Catford is currently underway in collaboration with the local community in the area. This aims to drive positive regeneration in the town centre, and deliver new mixed-use developments with residential, commercial and community uses.

7.92 In addition, plans to re-route the south circular, which recently secured HIF[8] funding, will unlock new development opportunities in the town centre, reveal new public spaces, and improve public realm and high street accessibility.

Catford Town Centre

[8] Housing Infrastructure Fund money from MHCLG, Treasury and Homes England https://www.gov.uk/government/publications/housing-infrastructure-fund

This will have a major impact on Catford and will help make the area a more attractive place to invest and develop, supporting growth in the economy.

Potential Local Impacts of the Bakerloo Line Extension

7.93 Catford currently has two stations: Catford (on the Catford Loop Line, with direct services to Elephant & Castle and London Blackfriars) and Catford Bridge (on the Hayes Line, with direct services to Lewisham and Charing Cross). The arrival of the Bakerloo Line in Catford will result in the conversion of Catford Bridge station into a London Underground station, replacing the current national rail services.

7.94 The comparative transport assessment suggests that the transport impact at Catford Bridge, in a similar manner to the other stations on the Hayes Line, will be marginally lower than in other parts of the BLE Corridor, as the existing national rail service is being replaced. Services from the adjacent Catford Station already connect to Elephant & Castle; however, the level of connectivity, frequency of services, and capacity will all increase significantly with the arrival of the Bakerloo Line. Changes in fare structures, provided by access to oyster single fares on the BLE, will also increase the affordability of travel from the area.

7.95 The inclusion of a station at Catford onto the Underground network will not only greatly reduce journey times and improve accessibility, but it will also have wider, positive, perception benefits, which will translate into enhanced perceptions of Catford Town Centre.

Place

7.96 Whilst development is already happening in Catford associated with the masterplan, the delivery of the BLE will support the evolution of the area by increasing the viability of the 3,600 homes identified in the masterplan, and through the delivery new commercial and residential space. Catford has potential for 500 additional homes on windfall sites and 2,500 sqm of commercial space due to the BLE.

Development Impact:

500 additional homes

2,500 sqm additional commercial space

7.97 The BLE will also support the viability for improvements and upgrades to the town centre environment. Conversion of the station will require major upgrades, including full step free access and gatelines. This will provide an opportunity to improve pedestrian and cycle access between the stations and town centre, and improved quality of interchange with Thameslink services. There are also plans for significant upgrades to public realm in Catford, which is currently low quality. In particular, the Catford Bridge station area is dominated by traffic, with an uninviting pedestrian and cycling environment towards Catford town centre.

7.98 The delivery of an upgraded station has the potential to improve the interchange to Catford station and the local bus network, making better use of the Ravensbourne River and connect to Catford Broadway and the town centre. Done well, such improvements could mean a rise on the Healthy Streets indicator scoring to at least 65, which is likely to make the town centre more attractive for businesses and investors.

Economy

7.99 The BLE has the potential to support the development of the local economy around Catford and address the current weaknesses in the economic vitality of the town centre. The intensification and evolution of space as a result of the BLE will help the economy to evolve and diversify, therefore increasing resilience. The economic benefits of the BLE in Catford include:

1) **2,500 sqm additional commercial floorspace** brings capacity for **125 additional jobs**

2) Delivery of new residential development would support an average of **150 additional temporary construction jobs per annum.** The supply chain and multiplier benefits of this would result in a further **400 jobs per annum**

3) These construction jobs would lead to a **direct GVA uplift of £99 million** and a **supply chain and induced GVA uplift of £170 million**

4) As a result of new homes, **1,100 additional people** will be in the area spending money and supporting the local economy. This will result in **£6.5 million additional expenditure** per annum by 2037

7.100 Catford town centre has been characterised by poor economic performance in recent years. The vacancy rate is above London average and employment levels have declined. Therefore, the economic impacts of the BLE have the potential to support the town centre to become more resilient and to perform better in the future. The BLE will increase demand and town centre spend, enhancing viability to maximise capacity within existing vacant space. The evolution of space and uses to create a more diverse economy will also increase resilience. Early regeneration works in the form of new small-business focused initiatives such as food markets, a new cinema, and new shops in the Catford Shopping Centre have shown great potential in the area.

7.101 In addition, the development of new commercial space will provide opportunity to shift the job profile in Catford. Currently, the area has a low proportion of high value knowledge jobs. The delivery of new office space will support new jobs, however, when coupled with improved transport connections, reputational improvements and an increasing workforce catchment, the BLE could catalyse a shift towards higher value jobs. If the BLE were to increase the location quotient of knowledge jobs by 50%, this could result in around 160 additional, high value jobs in the area.

7.102 As a result, Catford could play an increasingly important role in supporting Lewisham's creative economy. The BLE would help make the delivery of lower cost creative workspace more viable in Catford, which could help to relieve the pressure of rising prices and high demand in New Cross Gate. The Council's landholdings in Catford town centre have enabled it to pursue an approach of inclusive economic development in its meanwhile uses as it embarks on its masterplanned town centre transformation. This has already included provision of affordable creative workspace in vacated areas of the Council's office estate.

7.103 The economic pressures of BLE and future redevelopment of the town centre means that efforts to ensure regeneration remains inclusive will need to continue in the next phase of economic development. Increased footfall, improved physical attractiveness of the town centre, and extensive Council ownership and control of the area provides additional scope to curate the high street and support local small businesses. This in turn would support the long-term economic wellbeing of Catford, contributing to its distinctive local character and sense of place.

People

7.104 The BLE will improve connectivity and accessibility for the communities in Catford. 50% of LSOAs in the area are in the most deprived in the country. The BLE will better connect residents to employment, education and social/leisure opportunities across the city. Changes in fare structures (provided by access to oyster single fares) will also increase the affordability of travel. Improved access to jobs and training is particularly important in Catford as the number of claimants in the area has increased in recent years.

7.105 As well as better access to job opportunities in wider London, the BLE will provide opportunities for local jobs in Catford. A rapidly growing population and declining employment suggests that there is great need for new job opportunities for local people in the area. If 39% (the proportion of jobs in Lewisham taken up by local residents) of the 150 temporary jobs associated with the construction of new development were to go to local people, there could be 60 additional jobs for the local population. Applying the same proportions, new commercial development could support 50 permanent local jobs in the area. To maximise the local impact in Catford, it will be important that Lewisham puts specific policies in place to connect local people to opportunities.

7.106 According to the latest Index of Multiple Deprivation data, 50% of LSOAs within the Catford catchment are the most deprived in the country for access to housing. Therefore, the delivery of affordable homes within new development is an important benefit for the local community. Aligning with Lewisham's policies, if 50% of new homes associated with the BLE were affordable, that would result in 250 additional affordable units in the area. Land value uplift associated with the BLE will help to ensure the viability of additional affordable housing in the masterplanned area, increasing the affordable housing provision on other planned developments.

7.107 The potential for the BLE to contribute to major transformation in Catford, relating to its economy and opportunities for local people, suggests that the benefits of the BLE could result in wider social, health and wellbeing impacts. Access to employment and social opportunities, as well as improvements to the physical town centre environment, could have positive mental and physical health benefits for the local population, particularly those in deprived communities.

Summary of Impacts:

Catford is currently undergoing major change, primarily driven by the masterplan which will transform the town centre. Delivering the BLE will be a key part of this:

- ✓ **500** new homes
- ✓ **2,500 sqm** of new commercial space supporting **125** new jobs
- ✓ **150** additional temporary construction jobs per annum to build new development
- ✓ **£99m** direct GVA uplift from construction of new residential space
- ✓ **1,100** additional people resulting in **£32m** additional spend to support the economy

Mitigation of Adverse Impacts

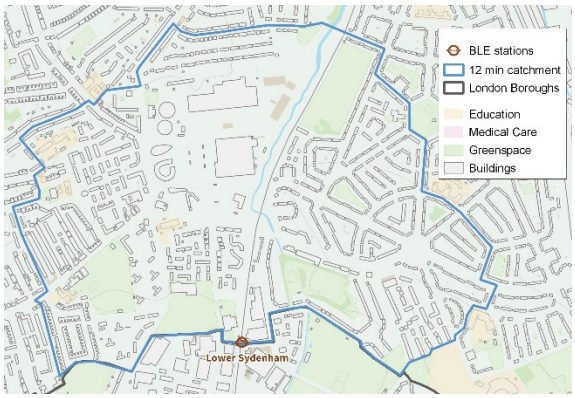
- **Construction Impacts –** the construction of the BLE is very likely to result in the closure of the Hayes national rail line for a period of time in order to complete the upgrade work. Whilst Catford Bridge will be affected, the presence of the nearby Catford Thameslink station will help to reduce any potential adverse impact on Catford town centre. However, it will be important to engage with local businesses to ensure any disruption is being minimised.

Local Impacts: Lower Sydenham

Current Conditions

7.108 Lower Sydenham station sits on the borough boundary with the London Borough of Bromley. The station is located a significant distance from Catford Bridge station as it was moved further south many years ago. The station is also located some distance from the town centre, has a poor sense of arrival and is not particularly easy to locate. On the Lewisham side of the station there are low rise leisure and industrial buildings which sit next to a large industrial area which falls within Bromley. To the east of the station is Bellingham which was a planned estate and as a result it has a homogenous physical environment with a low scale and a spacious nature. The residential neighbourhoods are punctuated with small parades of shops serving the local area.

Figure 7.5 Lower Sydenham's Catchment Area



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7.109 The town centre in Lower Sydenham is in two parts: Sydenham and Bell Green. The latter is dominated by a superstore, big box retail and a car park, with two gas holders as prominent landmarks.

Lower Sydenham station

Bell Green shopping centre

7.110 The table below gives an overview of the economic and social characteristics of the area. Cells highlighted in yellow suggest the metric is of particular importance to the area or is of interest (e.g. well above/below average).

	Character	Recent Change	Growth Trajectory (without BLE)
People	**Population 2017** 10,800 people	**Population Change 2012-17** + 8% increase in population	**Homes** Capacity for 1,400 homes **Commercial Space** Capacity for 27,300 sqm commercial space **Wider Aspirations** Creation of a district centre and employment centre for the south of the borough. Potential to re-locate the station northwards
	Deprivation 2015 + 67% of LSOAs in 20% most deprived	**Change in Claimant Count 2014-19** + 21% increase in the number of residents who are claimants	
	Claimant Count 2019 4.8% of 16-64 residents		
Economy	**Employment 2017** 4,200 jobs	**Employment Change 2012-17** + 32% increase in employment	
	High Value Sectors 2017 − 4% jobs in these sectors	**Business Change 2013-18** + 46% increase in the number of businesses	
	Business Size 2018* = 98.6% of businesses are small or micro		
Place	**Average House Price 2018** − £342,500	**House Price Change 2013-18** + 61% increase	
	Commercial Values 2018	**Change in Commercial Values 2013-18**	
	Retail – not available	**Retail** - not available	
	Office - £15 per sq. Ft. −	**Office** - 35% increase −	
	Industrial - £9 per sq. Ft. −	**Industrial** – 18% decrease −	
	PTAL values Average for station catchment = 2	**Recent investment in transport / public / community infrastructure** No major recent investment	
	Healthy Streets Score + 42		
	Town Centre Vacancy Rate 9.2%		

+	Above average
=	Similar to average (within +/- 10% of London average)
−	Below average

*+/- 1% of London average.

Place

7.111 The PTAL value in Lower Sydenham is low and is the lowest across the whole Corridor. Whilst there are direct trains into central London, overall connectivity and accessibility is poor due to the infrequency of service and journey times into the city centre. When coupled with the high levels of deprivation, these factors can result in high instances of transport poverty amongst residents. According to TfL's Travel Time Mapping, currently on 5% of London's jobs are accessible within 45mins of Lower Sydenham. This is very low, compared to 51% in New Cross Gate, for example.

7.112 Lower Sydenham also struggles with the lowest Healthy Streets score in the Corridor. The major challenges include large volumes of industrial traffic, poor walking and cycling infrastructure, and a station that is disconnected from main residential and town centre areas.

7.113 Conversely to the trend across the rest of the Corridor and trends across London, industrial rental values have decreased in recent years in Lower Sydenham. This could be a result of the high industrial vacancy rates that have been common in the area over the last 10 years due to the large supply of industrial space in this outer London location.

Economy

7.114 Average employment and population densities are very low, which is more typical of outer London centres. Due to the presence of the Bell Green shopping centre, located directly north of Lower Sydenham station, 25% of employment is in the retail sector, which is the highest of all the catchments in the Corridor. In addition, the proportion of high value jobs in Lower Sydenham is the lowest in the Corridor (3%).

Bell Green shopping centre

People

7.115 Lower Sydenham is a rapidly changing area. With strong population growth in recent years occurring alongside a fast-growing economy. A 32% increase in employment and 46% increase in the number of businesses suggests Lower Sydenham is quickly becoming an important local economic centre for employment and business.

7.116 Lower Sydenham has the joint highest proportion of LSOAs in the top 20% most deprived in the Corridor and has the highest proportion of residents claiming state support. The area has also seen the largest increase in the number of claimants in the Corridor by a significant margin - a 21% increase in claimants is over 5 times the Corridor average. This could suggest residents of the area are increasingly relying on state support rather than becoming active in the local economy. However, it could also be due to the development of a large social housing block in Bell Green in 2012. House prices have also risen considerably, which will impact on the affordability of the area for local people.

Growth Trajectory (without BLE)

7.117 There is significant opportunity to intensify and build upon the currently low-density, single-storey Bell Green shopping centre. Currently, there are various space inefficient uses which presents an opportunity for change and intensification. The limiting factor for making this feasible, both in planning and economic viability terms, is inadequate transport links and the associated reputational and land value challenges.

7.118 As explored in the development of Lewisham's Rail Vision, there is an opportunity to re-locate Lower Sydenham station northwards closer to the Bell Green shopping centre. This could enable the creation of a new and more accessible station in the area, with better links to the main areas of activity and which is surrounded by higher quality public realm and infrastructure.

Potential Local Impacts of the Bakerloo Line Extension

7.119 The arrival of the Bakerloo Line in Lower Sydenham will result in converted to TfL rail station. For the purposes of this study, it is assumed that the station will be moved northwards closer to Southend Lane and Bell Green.

7.120 The BLE proposals for Lower Sydenham will deliver strategic benefits of both the high frequency rail provision and a new station location. This would result in significant enhancement in the frequency of services, improved journey times, and direct access into central London, alongside improved pedestrian access and bus connectivity with Southend Lane. There will also be cheaper access to central London for Oyster single-fare users going beyond London terminals, and positive perception benefits associated with conversion to tube operation and inclusion onto the London Underground network. All of these benefits, alongside increases in PTAL levels, could catalyse the creation of a new Opportunity Area in the future.

Place

Development Impact:

4,100 additional homes

22,800 sqm additional commercial space

7.121 Lower Sydenham will have the largest development impact as a result of the arrival of the BLE out of all the Lewisham stations. The BLE will help to deliver on the major commercial and residential development potential in the area and will contribute to the significant transformation of Lower Sydenham. Capacity testing suggests the BLE could support an additional 4,100 homes and 22,800 sqm of commercial space. Station re-location is an essential re-requisite for unlocking this growth.

7.122 If Lower Sydenham were to achieve Opportunity Area status this would make large scale growth in the area more viable than current background growth. However, BLE delivery is likely to be the single biggest catalyst for major development.

7.123 Another major benefit of the BLE in Lower Sydenham is the associated upgrade to the local environment, public realm and the station. The current station is very small and has poor access. Poor quality public realm surrounds the station as well as complex road junctions.

7.124 The proposals to move Lower Sydenham station north to where Southend Lane crosses the railway east/west would improve the area as significant changes would be required to facilitate a new station. This would include increased width footways, segregated cycle provision, a greener environment and active uses. A new station location would also have new public realm around it, increase potential to unlock large-scale development, and could support a shift in focus towards a brand-new town centre. These improvements suggest a dramatic rise in the Healthy Streets score could be achieved in Lower Sydenham, for example from 42 up to approximately 65.

Economy

7.125 The BLE has the potential to catalyse major economic change in Lower Sydenham. The delivery of significant new commercial and residential development, and the jobs associated with this, will support economic intensification and diversification, particularly around the town centre and Bell Green. The economic benefits within the Lower Sydenham catchment include:

1) **22,800 sqm additional commercial floorspace** brings capacity for **1,200 additional jobs**

2) Delivery of new residential development would support an average of **1,200 additional temporary construction jobs per annum.** The supply chain and multiplier benefits of this would result in a further **3,400 jobs per annum**

3) These construction jobs would lead to a **direct GVA uplift of £811 million** and a **supply chain and induced GVA uplift of £1.4 billion**

4) As a result of new homes, **9,200 additional people** will be in the area spending money and supporting the local economy. This will result in **£53 million additional expenditure** per annum by 2037

7.126 These impacts associated with the BLE are likely to have a transformational impact on Lower Sydenham. The area currently has a higher than average vacancy rate and has a large site (Bell Green shopping centre) which has the potential to become a new town centre and economic hub for the area. Increased jobs and town centre spend will support the ability to maximise these opportunities and for the economy to evolve and diversify beyond retail uses.

7.127 The BLE will also enable the delivery of a large amount of new commercial space which will support new jobs in the area. As the area changes and becomes more competitive, and new types of spaces come forward, it is likely that the types of jobs will shift. Currently, Lower Sydenham has the joint lowest proportion (3%) of knowledge jobs in the Corridor. However, given the level of change likely to occur in the area, if the location quotient of knowledge jobs were to increase up to 10% (still below the Lewisham average), there could be around 300 additional, high value jobs. In addition, new homes will support 3,700 additional skilled workers to live in the area.

People

7.128 Lower Sydenham catchment area has the joint highest deprivation levels with the Old Kent Road, therefore the potential for positive impacts on the local community is high. In recent years there has been a large increase in the number of claimants, and the population in the area has been rapidly growing. The areas adjacent to the catchment area (Bellingham and Downham) also have very high deprivation levels and will mean east-west access into the new station will be extremely important.

7.129 The BLE will improve accessibility for local people into central London, giving them opportunities to access jobs and social opportunities in other parts of the city. This will help to increase the travel horizons of the deprived communities in the area and will reduce the cost of accessing central London locations. The scale of development in the Lower Sydenham area will also provide potential employment opportunities for local residents: the Census shows that 39% of jobs in the area are filled by Lewisham residents. Applying this percentage to the additional 1,200 temporary construction jobs in the area could mean around an extra 460 jobs for local residents in the borough. Using the same logic, new commercial development could also support around 460 permanent local jobs in the area.

7.130 High levels of deprivation in the area also extends to access to housing. Lower Sydenham has a very high proportion (83%) of LSOAs which are the most deprived in the country for access to housing. This is significantly higher than anywhere else in the BLE Corridor and means access to market-rate housing is limited for local people. As a result, the delivery of affordable housing is imperative in Lower Sydenham. Whilst 50% of homes (just over 2,000 homes) will be affordable, Lewisham Council has a key role to play in ensuring these new affordable homes will be accessible to local residents. This is particularly important given the scale of change and development in the area and the likelihood for land values to increase.

Summary of Impacts:

Lower Sydenham is the major focus area for growth in Lewisham. The area is likely to undergo significant transformation in coming years, which will be driven in large part by the delivery of the BLE:

- ✓ **4,100** new homes
- ✓ **22,800 sqm** of new commercial space supporting **1,200** new jobs
- ✓ **1,200** additional temporary construction jobs per annum to build new development
- ✓ **£811m** direct GVA uplift from construction of new residential space
- ✓ **9,200** additional people resulting in **£264m** additional spend to support the economy

Maximisation of Benefits and Mitigation of Adverse Impacts

- **Construction Impacts –** there is likely to be major disruption to train connectivity in Lower Sydenham during construction as the train line will be closed for conversion from national rail to London Underground. However, local residents will still be able to access a station at Beckenham Hill or Bellingham. If the station were to be re-built and moved northwards this could result in further local disruption and adverse construction impacts, such as increased congestion and air and noise pollution.
- **Better station access –** if the station were to be moved northwards and closer to the Bell Green shopping centre, there would be a significant opportunity to maximise the potential benefits of the BLE in Lower Sydenham. This would enable the creation of a more attractive and accessible town centre and overcome some of the current challenges of severance and very poor station access. Lewisham Council should continue to advocate that TfL move the station northwards as part of the BLE construction.

8. Summary of Impacts and Next Steps

8.1 This section provides an overall summary of the forecast local economic impacts within Lewisham and Southwark that could result from the BLE.

8.2 It also sets out a series of strategies for Lewisham and Southwark to ensure these impacts are realised and maximised, as well as measures to mitigate against any potential negative impacts of the BLE construction.

Impact Summary – by theme

Place

8.3 The transport capacity delivered by the BLE is forecast to generate value within the existing local economies and communities across the corridor. It will also unlock' the delivery of an additional 18,000 new homes across the corridor, within Lewisham and Southwark, and a further 137,800 sqm of additional commercial space. This is above the anticipated 26,800 new homes and 271,900 sqm of commercial space that could be delivered without BLE, but which will nevertheless be supported by the delivery of the extension.

8.4 The economic value associated within the transformation of local places is estimated at £4 billion.

Economy

8.5 The BLE is forecast to deliver 24,400 temporary jobs per annum associated with the construction of the scheme itself, as well as further 20,500 temporary jobs per annum related to the construction of 'unlocked' residential and commercial development (direct and supply chain jobs). The additional commercial floorspace attributable to BLE will also support an estimated 9,400 permanent jobs.

8.6 The economic value associated with direct, supply chain, and induced GVA impacts is estimated at £24.6 billion.

People

8.7 The additional homes delivered by BLE are forecast to bring a further 40,800 residents to Lewisham and Southwark, of whom 16,800 will be high-skilled residents. A proportion of the jobs created (detailed above) will go to local residents who live in the Lewisham and Southwark boroughs. It is expected there will be:

- 1,300 temporary local jobs per annum during construction of new development
- 2,000 permanent local jobs supported within new commercial space

8.8 The construction of the BLE itself will also support 600 apprenticeships and further local jobs.

Impact Summary – by spatial level

8.9 The tables below present summaries of all the impacts of the BLE at the Corridor, Southwark and Lewisham levels. A full summary of the impacts at station level is included in the table in Appendix A.

Corridor Wide

Transport	Place	Economy	People
• Capacity for **60,000** additional trips during the peak periods • **6,300** temporary construction jobs to build the extension, **18,100** supply chain jobs • Combined GVA of **£7.3bn**	• **18,000** additional homes • **137,800** sqm additional commercial space • **£4bn** land value uplift	• **£9.9bn** GVA impact from construction of additional development • **£7.4bn** GVA impact from jobs within new commercial space • **£114m** business rates uplift • **20,500** development construction jobs supported or created over 10 yrs • **9,400** permanent jobs being supported or directly created	• **40,800** additional people • **16,800** additional skilled residents • **9,000** affordable homes • **1,300** temporary local construction jobs per annum • **2,000** permanent local jobs in new space • **600** apprenticeships and local jobs for BLE construction, social value of **£8.65m**

London Borough of Southwark

Transport	Place	Economy	People
• Major improvement in connectivity along Old Kent Road • Enhanced local access to London Underground	• **10,800** additional homes • **94,900** sqm additional commercial space • **£2.4 – £2.5bn** land value uplift • **£71m** new homes bonus • **£112m** in council tax	• **£6bn** GVA impact from construction of additional development • **£5.8bn** GVA impact from jobs within new commercial space • **£88m** business rates uplift	• **5,400** affordable homes • **500** temporary local construction jobs per annum • **1,200** permanent local jobs in new space

London Borough of Lewisham

Transport	Place	Economy	People
• Step-change in frequency of services connecting the south of the borough • Significant improvement in journey times into central London	• **7,200** additional homes • **42,900** sqm additional commercial space • **£1.4 – £1.5bn** land value uplift • **£50m** new homes bonus • **£81m** in council tax	• **£3.9bn** GVA impact from construction of additional development • **£1.6bn** GVA impact from jobs within new commercial space • **£26m** business rates uplift	• **3,600** affordable homes • **800** temporary local construction jobs per annum • **850** permanent local jobs in new space

Realising and Maximising Benefit

8.10 The BLE clearly has the potential to be transformational for Southwark and Lewisham and their local business and resident communities. In terms of connectivity, the BLE will deliver a number of direct benefits to Southwark and Lewisham communities but it will be important to maximise the benefits for local people.

8.11 Whilst it is recognised that the construction of the BLE could, at times, cause localised disruption, and that the subsequent transformational impacts of the operating BLE could result in significant area change, the Councils' intention in undertaking this study has been to identify any potential issues that may arise and determine appropriate mitigation measures. Rather than simply looking to minimise potential negative impacts, the Council's will look to turn challenges into positive opportunities.

8.12 There are two main areas of focus for the Council's to consider:

- *Maximising benefits:* the impact assessment has identified numerous types of local socio-economic impact that the BLE could deliver, but which will require some degree of proactive intervention by Southwark, Lewisham and other local partners to be unlocked.
- *Mitigating adverse impacts:* similarly, the impact assessment has identified the potential for a number of adverse impacts relating to both the delivery and operation of the BLE. Strategies will need to be put in place to mitigate these impacts and to ensure that local communities and users are no worse off as a result of the BLE

8.13 In this section, initial consideration has been given to where there may be need for impact maximisation and mitigation strategies. This builds on the findings of the baseline analysis and impact assessment, as well as on research into what has worked and been delivered elsewhere.

On-going Work by Lewisham and Southwark Councils

8.14 It is worth recognising that much work has already been done by both Councils and that they each have wider plans, strategies and approaches in place to influence the forecast outcomes associated with the BLE.

8.15 Work already completed includes masterplanning on the Old Kent Road, studies focusing on delivering more employment space, and the New Cross Gate Area Framework to understand future impacts on New Cross Gate and a 1km radius around the station. The Lewisham Town Centre Local Plan sets out the Council's vision for the town centre and the intentions for its growth. Many of the sites within the LTC Local Plan have already been built out.

8.16 In Lewisham town centre, the Council are looking to develop the 'Lewisham Spine' cycling route which will support cycling links to the future BLE stations, and much work has been done to improve links between Lewisham station, the town centre and new residential developments.

8.17 Masterplanning work in Lower Sydenham will focus on the area around the station including the retail park, bridge leisure centre and station square. Affordable workspace has, or will, come forward across the boroughs, including Catford Dek and Place Ladywell, and will support local businesses and the aspirations of Lewisham's digital and creative strategy.

Areas of Intervention

8.18 The subsequent assessment considers four broad areas for intervention:

1) *Construction*: mitigating potential for adverse impacts and maximising local economic opportunities relating to construction employment and supply chains

   - For example, Lewisham town centre will have a new construction hub which brings together experts from the construction industry to offer advice, training and employment services and provide brokerage and business-development service to help Lewisham-based businesses secure local contracts and recruit skilled workers.

2) *Development and place-shaping:* ensuring that the BLE helps to deliver transformational change across the Corridor in term of the scale and quality of development and place focused investment

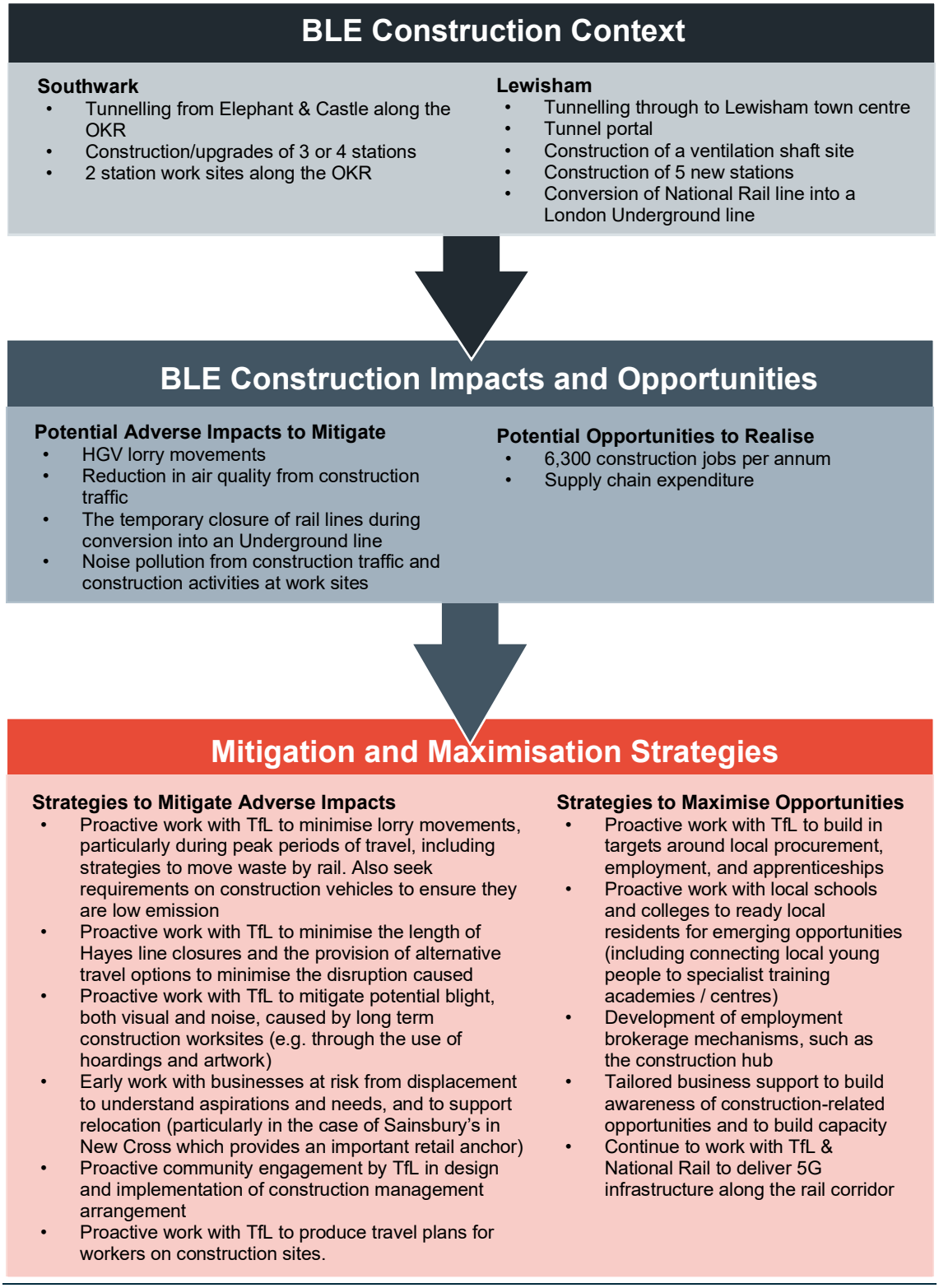
3) *Economy:* ensuring that the BLE helps to support the Corridor's economy to become more resilient and diverse, and to support the increase in economic critical mass where relevant

4) *People and community:* ensuring that the BLE delivers transformational benefits for the Corridor's people, improving access to jobs, housing and services, and helping to enhance overall levels of community prosperity, wellbeing and integration.

BLE Construction

8.19 A summary of potential mitigation and maximisation strategies relating to the BLE construction process are summarised below.

Figure 8.1 BLE Construction: Summary of Areas for Future Focus

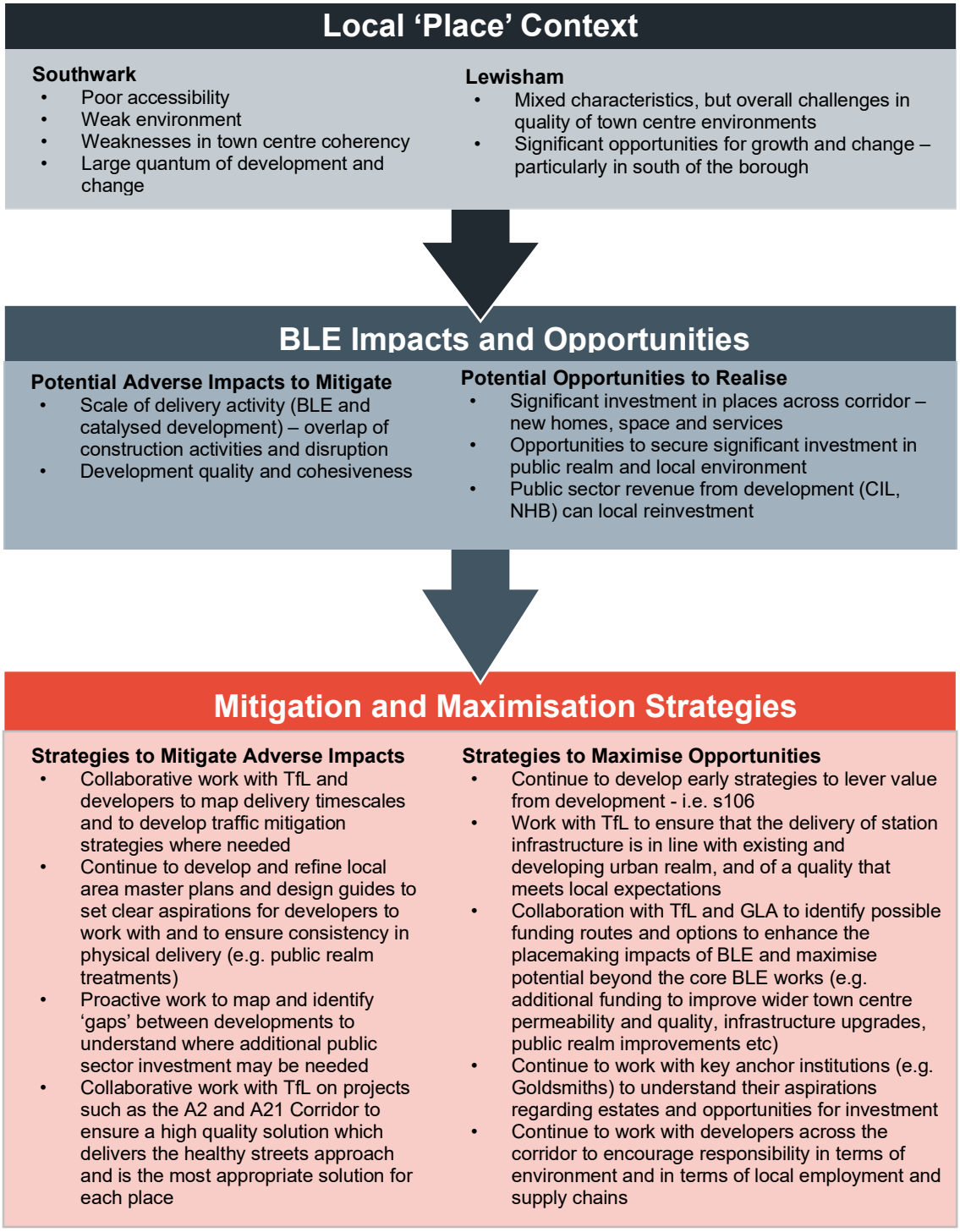


Source: Hatch Regeneris

Development and Place-Shaping

8.20 A summary of potential mitigation and maximisation strategies relating to 'development and place' once the BLE is operational is summarised below.

Figure 8.2 Development and Place-Shaping: Summary of Areas for Future Focus

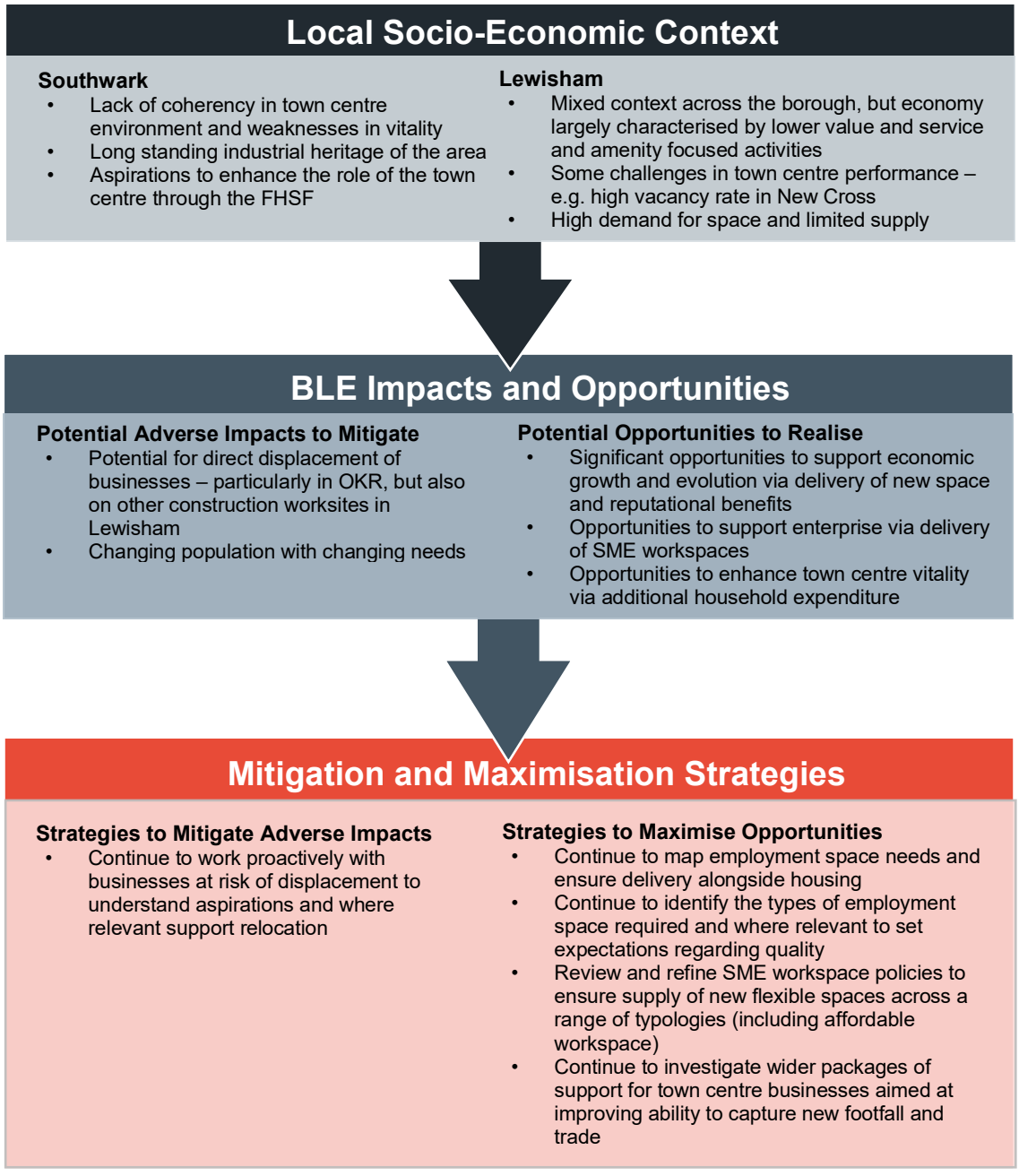


Source: Hatch Regeneris

Economy

8.21 A summary of potential mitigation and maximisation strategies relating to 'economy' once the BLE is operational is summarised below.

Figure 8.3 Economy: Summary of Areas for Future Focus

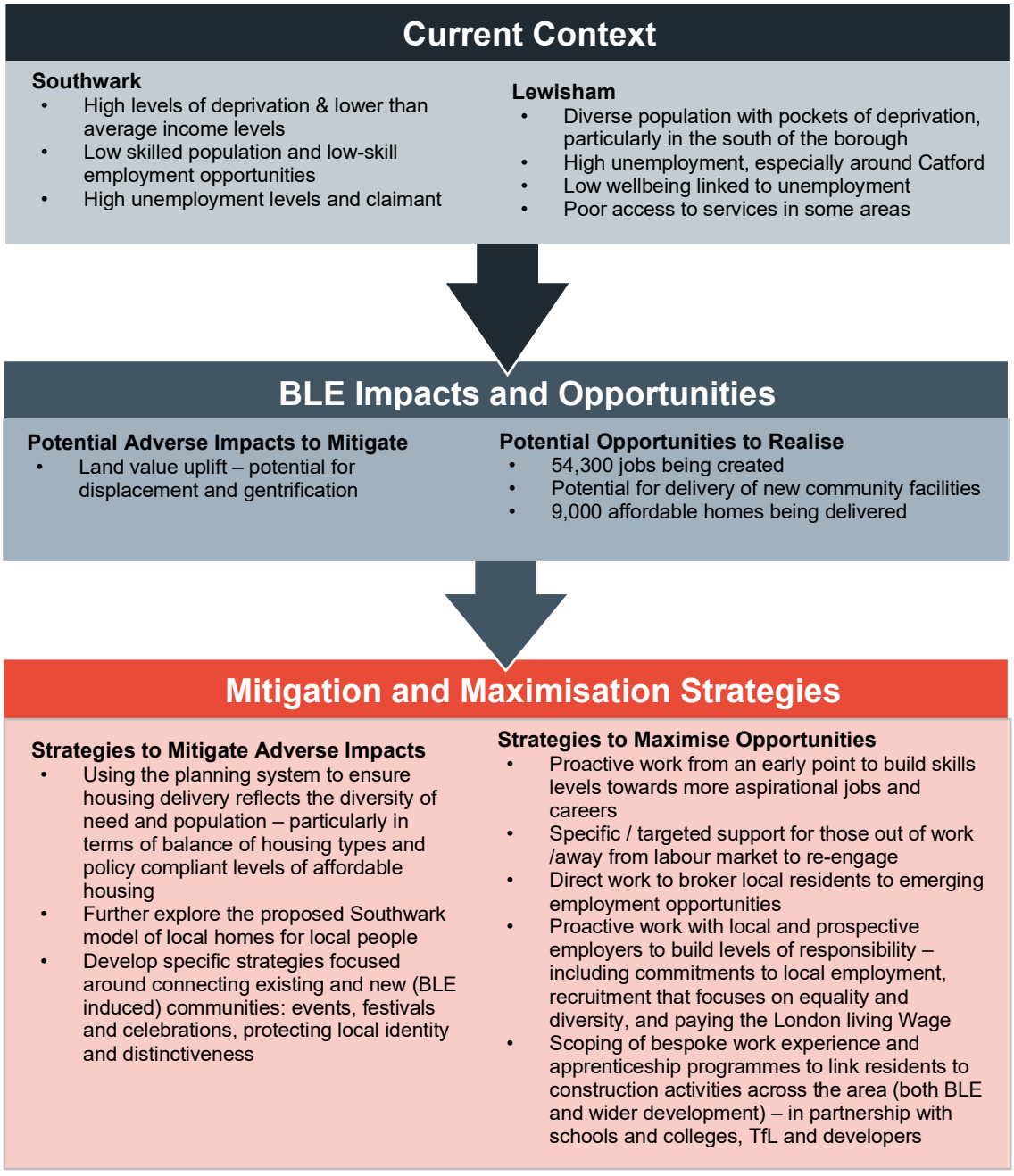


Source: Hatch Regeneris

People

8.22 A summary of potential mitigation and maximisation strategies relating to 'people and community' once the BLE is operational is summarised below.

Figure 8.4 BLE People: Summary of Areas for Future Focus



Source: Hatch Regeneris

Next Steps

8.23 While the delivery and completion of the BLE is still some way off, many of the areas for intervention identified above will require early scoping and development to ensure that appropriate responses are in place within the key BLE timescales. Both Councils already have many on-going initiatives, including a Growth Partnership with TfL and the GLA, and so many of the interventions are about building upon existing approaches.

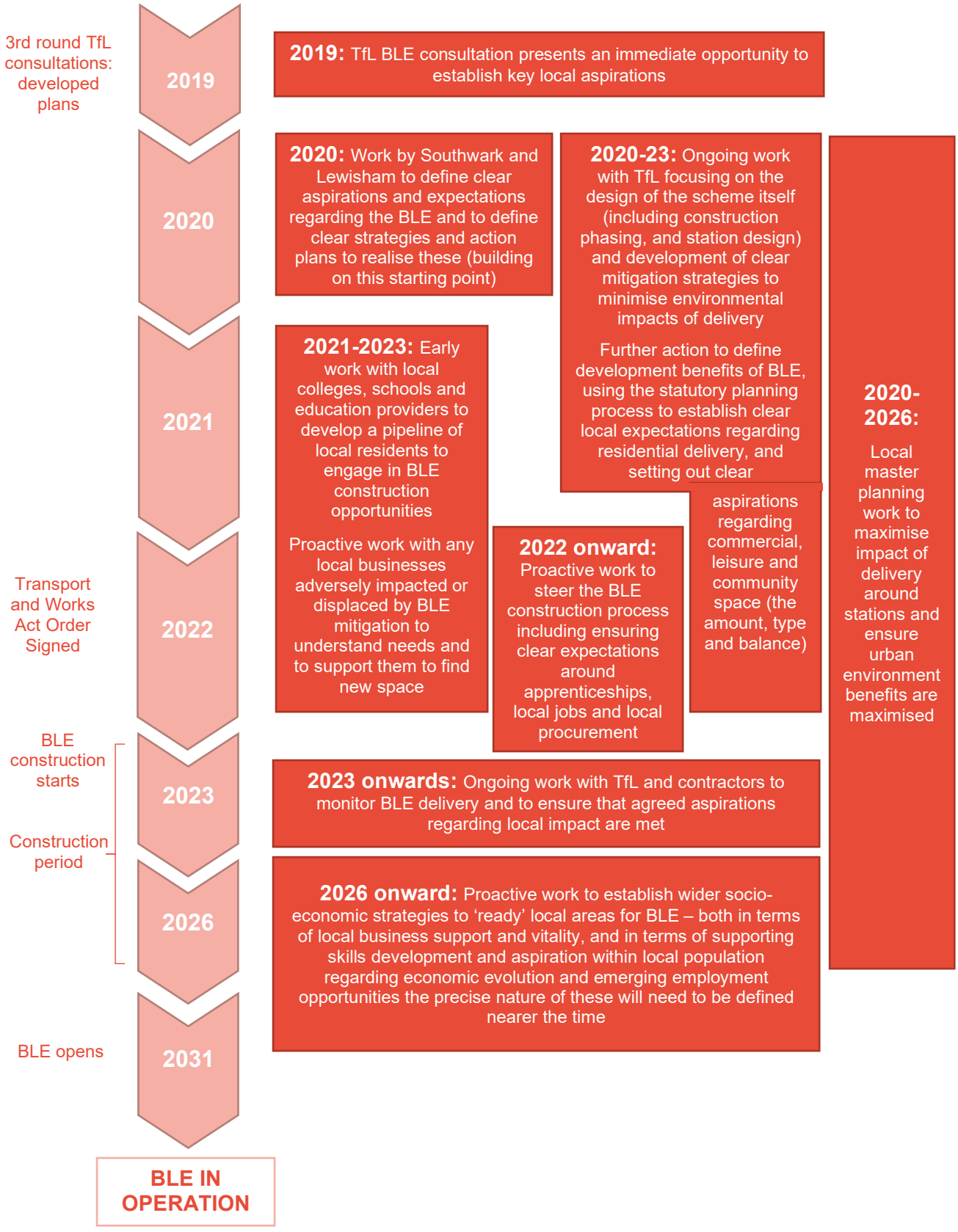
8.24 As noted above, action to maximise the benefit of the BLE requires a collaborative approach to be fully effective: between TfL, Lewisham and Southwark but also with wider partners, including developers and investors schools, colleges, anchor institutions, businesses and residents. The relationships required are already established but will need to be strengthened, and become more focussed on specific issues, as the BLE project develops.

8.25 There are a number of different routes and 'tiers of influence' via which positive impacts will be achieved. While there are likely to be some areas that require specific additional investment, a large degree of impact can also be achieved via strategic influence and use of formal planning powers:

- Via collaboration with TfL and developers to influence their plans and proposals
- Via the planning system to set clear parameters regarding future development and to seek the delivery of connections to stations and improved public realm within developments, wherever possible
- Via planning obligations to lever additional value from development
- Via collaboration with skills and employment agencies to tailor their existing delivery activity
- Via additional and bespoke socio-economic programmes and investment to respond to gaps or to specific areas of need.

8.26 Indicative timescales for action are summarised in Figure 8.5.

Figure 8.5 Summary of Future Delivery Scales



Source: Hatch Regeneris

Appendix A - Summary of Impacts*

		Transport Impacts	Place	Economy	People	Summary Assessment
Corridor Wide		• **Capacity for 60,000 additional trips during the peak periods** • **6,300 direct construction jobs to build to BLE**	• **18,000 additional homes** • **137,800 sqm additional commercial space** • **£4bn land value uplift**	• **£9.9bn GVA impact from construction of additional development** • **£7.4bn GVA impact from jobs within new commercial space** • **£114m business rates uplift** • **29,900 jobs being supported or directly created**	• **40,800 additional people** • **16,800 additional skilled residents** • **9,000 affordable homes** • **1,300 temporary local construction jobs per annum** • **2,000 permanent local jobs in new space** • **600 apprenticeships and local jobs for BLE construction, social value of £8.65m**	**Major Impact**
Southwark	**Aggregated Impacts**		• **10,800 additional homes** • **£2.5bn land value uplift** • **£71m new homes bonus** • **£112m in council tax**	• **£6bn GVA impact from construction of additional development** • **£5.8bn GVA impact from jobs within new commercial space** • **£88m business rates uplift**	• **5,400 affordable homes** • **500 temporary local construction jobs per annum** • **1,200 permanent local jobs in new space**	
	Elephant and Castle	✔ ✔ ✔ Enhanced local access and interchange for Underground services	• 32,800 sqm additional commercial space • Improved station access and enhanced public realm around the new station	• 85 direct construction jobs per annum for new development • £58m direct GVA uplift from those new jobs	• 14 additional local construction jobs per annum • 430 permanent local jobs in new space	**Minor Impact**
	Old Kent Road	✔ ✔ ✔ ✔ ✔ ✔ Major improvement in accessibility and reduced journey times into Central London	• 10,500 additional homes; • 59,900 sqm additional commercial space • 308 additional homes on Bricklayers roundabout • transformational change to the area with potential to uplift Healthy Streets score by 20 points	• 3,100 direct construction jobs per annum for new development • £2.1bn direct GVA uplift from those new jobs • £682m additional household expenditure	• 5,300 affordable homes • 150 affordable homes at Bricklayers • 490 additional local construction jobs per annum & 730 permanent local jobs in new space • Significant improvements to public transport provision for local deprived communities	**Major Impact**

*Financial and economic benefits (e.g. GVA, CIL, land value uplift) are calculated over a 10-year period.

Lewisham	**Aggregated Impacts**		• **7,200 additional homes** • **£1.5bn land value uplift** • **£50m new homes bonus** • **£81m in council tax**	• **£3.9bn GVA impact from construction of additional development** • **£1.6bn GVA impact from jobs within new commercial space** • **£26m business rates uplift**	• **3,600 affordable homes** • **800 temporary local construction jobs per annum** • **850 permanent local jobs in new space**	
	New Cross	✔ ✔ ✔ ✔ ✔ Significant enhancement in service level and journey times into Central London	• 1,000 additional homes; • Replacement of unfit station with new mixed-use development • Increased Healthy Streets score	• 300 direct construction jobs per annum for new development • £200m direct GVA uplift from those new jobs • £68m additional household expenditure	• 500 affordable homes • 110 additional local construction jobs per annum	**Moderate Impact**
	Lewisham Town Centre	✔ ✔ ✔ ✔ ✔ Significant enhancement in journey times into Central London	• 1,300 additional homes; • 17,600 sqm additional commercial space • Healthy Streets score could increase to above 70	• 400 direct construction jobs per annum for new development • £300m direct GVA uplift from those new jobs • 900 jobs supported in new commercial space • £86m additional household expenditure	• 650 affordable homes • 160 additional local construction jobs per annum • 340 permanent local jobs in new space	**Moderate Impact**
	Ladywell	✔ ✔ ✔ ✔ ✔ Step-change in frequency of service and direct access to Central London	• 250 additional homes; • Medium impact to environment and public realm • Reputational and perception benefits of metroisation	• 70 direct construction jobs per annum for new development • £48m direct GVA uplift from those new jobs • £16m additional household expenditure	• 125 affordable homes • 30 additional local construction jobs per annum	**Minor Impact**
	Catford	✔ ✔ ✔ ✔ Step-change in frequency of service	• 500 additional homes; • 2,500 sqm additional commercial space • Potential for significant improvement to town centre environment • Reputational and perception benefits of metroisation	• 150 direct construction jobs per annum for new development • £99m direct GVA uplift from those new jobs • 125 jobs supported in new commercial space • £32m additional household expenditure	• 250 affordable homes • 60 additional local construction jobs per annum • 50 permanent local jobs in new space	**Moderate Impact**
	Lower Sydenham	✔ ✔ ✔ ✔ ✔ Step-change in frequency of service and direct access to Central London	• 4,100 additional homes; • 22,800 sqm additional commercial space • Transformational change to town centre, potential for upgraded station and environment and re-location of the station	• 1,200 direct construction jobs per annum for new development • £811m direct GVA uplift from those new jobs • 1,200 jobs supported in new commercial space • £264m additional household expenditure	• 2,000 affordable homes • 460 additional local construction jobs & 460 permanent local jobs in new space • Significant improvements to public transport provision for local deprived communities	**Major Impact**

Appendix B - Technical Methodology

Overall Approach

B.1 Where possible we have ensured that our assumptions have been informed by Government guidance, including the HM Treasury Green Book. This provides clear guidance on valuing the costs and benefits of intervention through, for example, major infrastructure schemes to government and society. The key principles which have been followed include the following:

- Impacts should normally be extended to cover the period of the useful lifetime of the assets;
- Impacts should normally be based on market prices as they usually reflect best alternative uses that a good or service could be put to (the opportunity cost);

B.2 Wider social and environmental impacts for which there is no market price have also been considered. Within the scope of this study, we have drawn upon literature, where available, to quantify these wider impacts or presented the benefits qualitatively.

Types of Impacts

B.3 In monetising the impacts of the BLE, impacts are split into three categories:

- **Economic impacts**: this category includes costs to Southwark and Lewisham economies, such as changes in levels of business activity and associated Gross Value Added (GVA), and changes in land and property values;
- **Financial impacts**: this category covers those financial impacts for the public sector including revenue from business rates, council tax, New Homes Bonus and community infrastructure levy; and
- **Societal and environmental impacts**: this covers wider, non-monetary impacts relating to individuals. The values generally represent impact on welfare of those affected (generally represented in terms of the maximum price someone might be willing to pay for an improvement in something, or the minimum price they would accept in compensation for a deterioration in something).

Assessing Employment and GVA

B.4 While our approach for assessing impacts varies on a case-by-case basis according to information availability (see section below), a number of core principles have underpinned our approach to assessing employment and GVA impacts:

- **Employment**: estimates of employment impacts are based on information provided by Southwark and Lewisham on the amount of future commercial floorspace (e.g. town centre and commercial uses) which might come forward, and HCA's Employment Density Guide (Homes and Communities Agency, November 2015). This is a standard and approved methodology for assessing employment for impact appraisal purposes. Please note that throughout the assessment we make reference to full-time equivalent (FTE) employees. FTE is a unit that indicates the workload of an employed person. An FTE of 1.0 is equivalent to one full-time employee, whilst a part-time employee working half the hours is identified as 0.5 FTE;

- **GVA**: Gross value added comprises the sum of employee salaries and corporate profits and is a measure of the value of goods and services produced in an area, industry or sector and is the approved unit through which to measure local economic impact or value. Our methodology for assessing GVA impacts throughout our assessment is underpinned by evidence on employment impacts. The ONS Annual Business Survey (ABS) provides data on GVA for the London economy by each sector. Using information from the ONS Business Register and Employment Survey (BRES) on the number of employees within each sector we have estimated average GVA per FTE for each sector in London. We have applied these benchmarks to the employment figures to estimate total GVA supported. This gives a figure of GVA per annum associated with that quantum of employment which can then be used to estimate impact over longer time periods (see below); and
- **Multipliers**: Further economic activity (in terms of jobs, expenditure and income) associated with additional income, supplier purchases and longer-term developments at the regional (i.e. London) level have also been considered. Benchmark multipliers from the Hatch Regeneris Input-Output Model[9] have been used to quantify the wider impacts generated. Please note that it is not possible to accurately quantify these at the local authority-level, and all figures provided are at the regional (i.e. London) level.

Assessing Land Value Uplift

B.5 The assessment of the influence of the BLE upon land values has considered the impact upon both existing property values from the enhanced access provided by the scheme, as well as the extent to which development opportunities are "unlocked" and can be considered dependent upon the BLE.

- **Existing property values:** The assessment of the impact the BLE will have upon existing property values is based upon case study evidence from other major transport scheme investments (including Crossrail and HS2). This determined a range of low and high property value growth rates for residential and non-residential land uses.
- **Dependent development:** The assessment of dependent development follows the principles set out within DfT TAG and MHCLG guidance. The underlying (deadweight) level of development forecast to take place under a scenario without the transport capacity provided by BLE has been assessed. The opportunity to 'unlock' additional development sites as a result of the increased transport capacity provided by the BLE has then been determined. The associated change in the value of the 'unlocked' land has then been calculated, applying local rental values.

Assessing Impacts Over Time

B.6 Many of the impacts being assessed are valid across long (and varying) timeframes. Largely this can be split into two categories:

- **Temporary Impacts**: impacts which will persist for BLE's construction period. This largely relates to the footprint of construction activities, although consideration has been given to how this may affect wider economic vitality within the local impact

[9] The Hatch Regeneris Input-Output Model uses the input-output tables produced by the ONS to assess the flow of goods and services between different sectors within the London economy. It provides measures of economic output (GVA), employment, income and tax multipliers for over 100-sectors to estimate the full multiplier effects arising from a change in output/ demand in any of these sectors.

areas. As noted above, the construction period for the BLE is assumed to be 2023 to 2031; and

- **Permanent Impacts:** longer-term impacts, largely relating to the operational scheme. It is important to note that there is no standard guidance in the HM Treasury Green Book regarding the time over which the loss or gain of land and assets should be costed over. In this instance, we have costed loss/ gain of land, land value uplift and GVA impacts over a ten-year period. Previous studies have identified the persistence of impacts of transport infrastructure schemes to range from five to 15-years. The assessment of land value uplift draws on research conducted by KPMG which provides assumed BLE-specific property value uplifts for a ten-year period between 2026-35. Given this evidence/ guidance, a ten-year persistence period was considered to be the most appropriate approach.

B.7 The assessment of the impacts attributable to the BLE is presented in terms of Net Present Value (NPV) of impacts. Future impacts have been discounted using standard HM Treasury Guidance (with annual discounting of 3.5% assumed). This is a recognised approach for comparing costs which occur in different time periods and are based on the principle that, generally, people prefer to receive goods and services now rather than later.

Aggregating Impacts

B.8 A noted above, the framework differentiates between economic impacts, financial impacts, and societal impact. These are three different types of impact, assessed using different methodologies, and cannot be aggregated.

B.9 Impacts are only monetised and aggregated where a good degree of confidence exists in both the underlying evidence and the assessment methodology. Where this is not the case, the assessment provided is more qualitative or descriptive in nature.

B.10 Where possible, the aggregation of impacts is set out in terms of its NPV, and only impacts that are considered not to constitute double counting are considered. This includes fiscal benefits to Southwark and Lewisham (such as NHB, CIL, Council Tax and Business Rates), contribution to the local economy, as well as land value uplift.

Appendix C - Quality of Place Appraisal

C.1 See the appraisal on the following pages.

WE MADE THAT

BLE IMPACT ASSESSMENT
HEALTHY STREETS APPRAISAL | 16-11-2019

INTRODUCTION

Using the Healthy Streets criteria, this document outlines the existing public realm qualities and future opportunities for proposed sites of new and improved rail stations along the Bakerloo Line Extension corridor.
From north to south, these stations are categorised below:

— 1.0 Bricklayers Arms
— 2.0 Burgess Park (Old Kent Road)
— 3.0 Asylum (Old Kent Road)
— 4.0 New Cross Gate
— 5.0 Lewisham
— 6.0 Ladywell
— 7.0 Catford
— 8.0 Lower Sydenham

Healthy Streets methodology

Assessment has been based on the ten criteria found in the Healthy Streets check for designers implemented by the Mayor of London and Transport for London (though full technical assessments have not been undertaken).

To better inform quality of place main roads adjacent to new station locations have been audited, which will correlate with the experience of main passenger flows entering and exiting the new stations.

The Healthy Streets Approach puts people and their health at the centre of decisions about how to design, manage and use public spaces. It is based on the 10 Healthy Streets Indicators which focus on the experience of people using streets.

The outcome graphics show how the audited streets perform on the following 10 indicators:

— Pedestrians from all walks of life
— Easy to cross
— Shade and shelter
— Places to stop and rest
— Not too noisy
— People choose to walk, cycle and use public transport
— People feel safe
— Things to see and do
— People feel relaxed
— Clean air

Where the high numbers on the scale show a good performance and the low numbers show below standard performance.

Note: some scoring on the healthy streets check list have been based observational perception only such as, items 4 & 5 related to traffic noise, item 6 related to NO2 concentration and item 21 related to lighting levels.

Scoring overview

All locations score relatively similarly from 60% highest to 42% lowest, on a percentage from 0% to 100%.

Best to worst by overall score:

1: Lewisham
2: Brickayers Arms
3: Ladywell
4: New Cross Gate
5: Burgess Park (Old Kent Road)
6: Catford
7: Asylum (Old Kent Road)
8: Lower Sydenham

A zero score as part of any criteria indicates a ‘known road danger’ and if achieved on a proposed layout would cause that design to be invalidated in Healthy Streets terms. In this scoring of existing sites, all locations achieved at least one ‘zero’ score.

Best to worst by quantity of ‘zero’ scores, where number of ‘zero’s’ shown in brackets:

1: Bricklayers Arms (1)
2: New Cross Gate (2)
≠3: Lewisham (3)
≠3: Burgess Park (Old Kent Road) (3)
≠3: Catford (3)
4: Asylum (Old Kent Road) (4)
5: Lady well (5)
6: Lower Sydenham (6)

The following statements highlight the particular items that scored zero:

— All location score zero on the impact of the volume of two way motorised traffic
— All locations except in Bricklayers and Lewisham score zero on the interaction between large vehicles and people cycling
— All location except Bricklayers, Burgess Park and New Cross Gate score zero on the effective width for cycling
— Asylum, Ladywell and Lower Sydenham score zero on speed of motorised traffic
— Burgess Park, Lewisham and Lower Sydenham score zero on Width of clear continuous walking space.
— Asylum, Ladywell and Lower Sydenham score zero on speed of motorised traffic
— Ladywell and Lower Sydenham score zero on Collision risk between people cycling and turning motor vehicles.

1.0
BRICKLAYERS ARMS

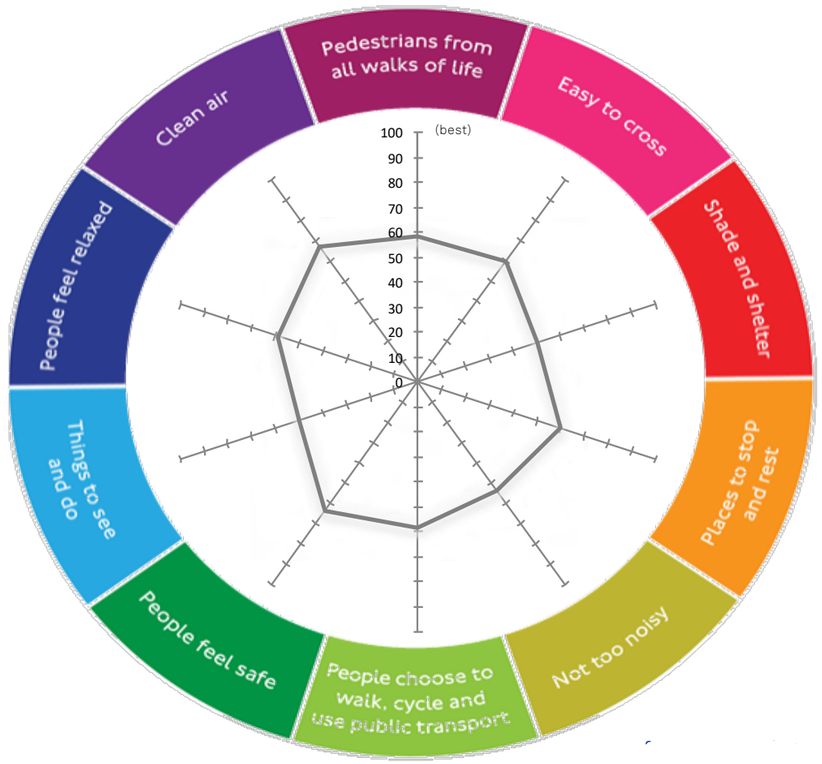
Quality of place

This will be a new station where no other rail station exists. The public realm is fragmented by a roundabout that includes a green space within and wide footpaths framed by a highway flyover and inactive street frontages. New development sites have been identified by the Old Kent Road Masterplan such as Crimscott Street and Old Kent Road (North).

Healthy streets check for designers comments

- Volume of traffic affects noise and air pollution
- There is a significant proportion of large vehicles
- Pedestrian footways and crossings are new and include improved features for safety for pedestrians, however the amount of crossings could be increased to meet all desire lines
- There is a lack of active frontages which makes the area inactive and where people barely stop, with little overlooking, except from passing drivers

Healthy streets check for designers



Healthy Streets Indicator scores (%)

	Existing layout
Pedestrians from all walks of life	58
Easy to cross	60
Shade and shelter	50
Places to stop and rest	60
Not too noisy	53
People choose to walk, cycle and use public transport	58
People feel safe	64
Things to see and do	50
People feel relaxed	59
Clean air	67
Overall Healthy Streets Check score	59
Number of 'zero' scores	1

1.0
BRICKLAYERS
ARMS

Opportunities

The traffic volume and infrastructure in the area makes pedestrians movement difficult with short time allowances at crossings. Improvement for pedestrians and cyclists would require significant remodelling of the junction.

There is a constant congestion of vehicular traffic from the A2 to the A100 which, traffic reduction measures would help pedestrian safety and flow.

There is already some cycle infrastructure provision in place, however there is opportunity to improve connections from segregated lanes to demarcated ones and from shared paths to narrower side roads such the connection from A2 to A100.

There is opportunity to add safety measures to protect cycles from large vehicles in the area.

1.0
BRICKLAYERS ARMS

Opportunities

There is opportunity to add public cycle parking space. There is a Santander bike station that is well used but no other public cycle parking.

There s opportunity to address severance caused by A201 fly-over by potentially bringing activity to the covered spaces and integrating it to the public realm. Making use of the sheltered spaces created by the overpass. Removal of the fly over could provide development opportunity although the site would be fairly constrained by the movement function.

There is opportunity to activate and use the existing green infrastructure within the roundabout which is at the moment underused by adding some activity that provides more amenity and invites people to stop and spend time.

There is opportunity to incorporate seating elements and amenities to the existing wide paths as well as activating blank walls where appropriate.

2.0
BURGESS PARK
(OLD KENT ROAD)

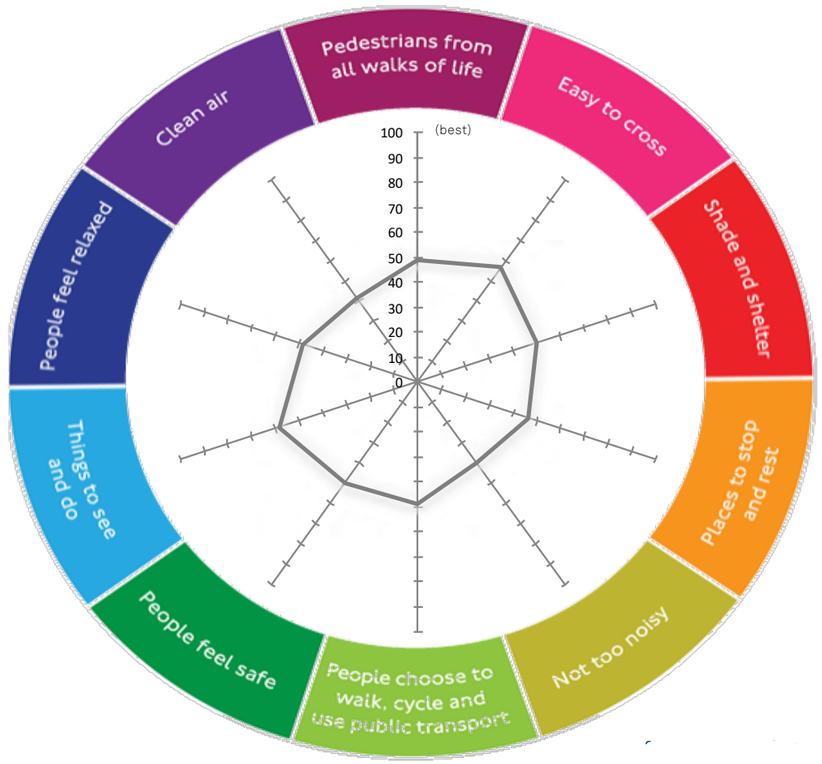
Quality of place

This will be a new station where no other rail station exists. The main open space asset is Burgess Park which has direct access from Old Kent Road including a generous entrance. Old Kent Road, however, causes significant severance between the two sides for cycles and pedestrians. New development sites have been identified by the Old Kent Road Masterplan such as the Tesco superstore and carpark, site including the proposed station which has a row of traditional high street frontages sit south-west. The Mandela Way development site is proposed north and Cantium and St Jame's Road & Stables sit south-east beyond Burgess park entrance.

Healthy streets check for designers comments

— Volume of traffic affects noise and air pollution.
— Speed of traffic affects perception of cycle and pedestrian safety
— The Old Kent Road creates significant severance between the two sides with only occasional staggered pedestrian crossings with long wait-times
— Large volumes of people gather at bus stops, often at locations with little footway width
— Only experienced cyclists use the carriage way, with footways tight and congested at this location
— There are some street trees along this route, however there is minimal amount of other greening
— There are some existing benches under tree canopies on one side of the road next to Tesco which are very busy

Healthy streets check for designers



Healthy Streets Indicator scores (%)

	Existing layout
Pedestrians from all walks of life	49
Easy to cross	57
Shade and shelter	50
Places to stop and rest	47
Not too noisy	40
People choose to walk, cycle and use public transport	49
People feel safe	50
Things to see and do	58
People feel relaxed	49
Clean air	42
Overall Healthy Streets Check score	49
Number of 'zero' scores	3

2.0
BURGESS PARK
(OLD KENT ROAD)

Opportunities

At Old Kent Road at the Tesco site, there is opportunity to look at segregated cycle lanes to avoid mixing with large vehicles and reducing collisions.

There is opportunity for crossing improvements both for cycle and pedestrian, responding to desire lines as well as decreasing waiting times and improving overall legibility.

Opportunity to increase active frontages as opposed to vast car park spaces, to improve safety and natural surveillance.

There is opportunity to improve existing bus stop areas, with more greening and characterful features.

There is opportunity to break severance caused by Old Kent Road to allow for easier crossings that respond to desire lines.

3.0
ASYLUM
(OLD KENT ROAD)

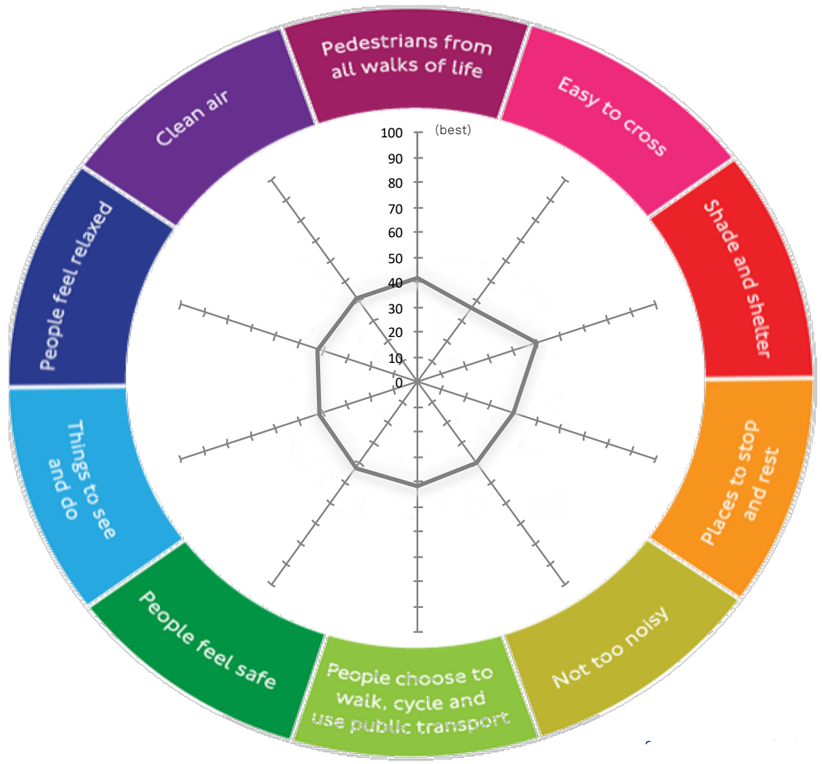
Quality of place

This will be a new station where no other rail station exist. The car park sits between industrial sites, a petrol station and single use wholesale retail buildings. The existing infrastructure responds to mainly vehicular use with very few cycle and pedestrians. The site is also close to the historic former 'Licensed Victuallers' Benevolent Institution Asylum', from where the station takes its name. New development sites have been identified by the Old Kent Road Masterplan such Sandgate Street & Verney Road to the including the proposed station and extending north-west from it and Hatcham Ilderton & Old Kent Road (south) to the north east.

Healthy streets check for designers comments

— Volume of traffic affects noise and air pollution
— The amount of large vehicles is significant
— Old Kent Road creates a significant severance between the two sides with few and long wait signalised crossings spread more than 150m away from each other
— There is a lack of stopping and resting points along routes
— Only experienced cyclists use the carriageway, the only option available
— There are some street trees along this route, however there is minimal amount of other greening

Healthy streets check for designers



Healthy Streets Indicator scores (%)

	Existing layout
Pedestrians from all walks of life	42
Easy to cross	37
Shade and shelter	50
Places to stop and rest	40
Not too noisy	40
People choose to walk, cycle and use public transport	42
People feel safe	42
Things to see and do	42
People feel relaxed	42
Clean air	42
Overall Healthy Streets Check score	42
Number of 'zero' scores	4

3.0
ASYLUM
(OLD KENT ROAD)

Opportunities

There is opportunity to improve pedestrian and cycle environment by adding additional uses, to the sites surrounding Old Kent Road.

There is opportunity to widen the footways to allow for more flow of pedestrians, stopping points and to be able to separate bus-stop waiting areas and foot path. This could also include introducing unified and even materials.

There is opportunity to improve cycle infrastructure to protect cyclists from large vehicles.

There is opportunity to enhance existing mature trees by creating the space for additional planting features as well as seating pockets where appropriate.

There is opportunity to add new crossings and improve and widen existing crossings to break Old Kent Road severance and improve the pedestrian environment.

4.0
NEW CROSS GATE

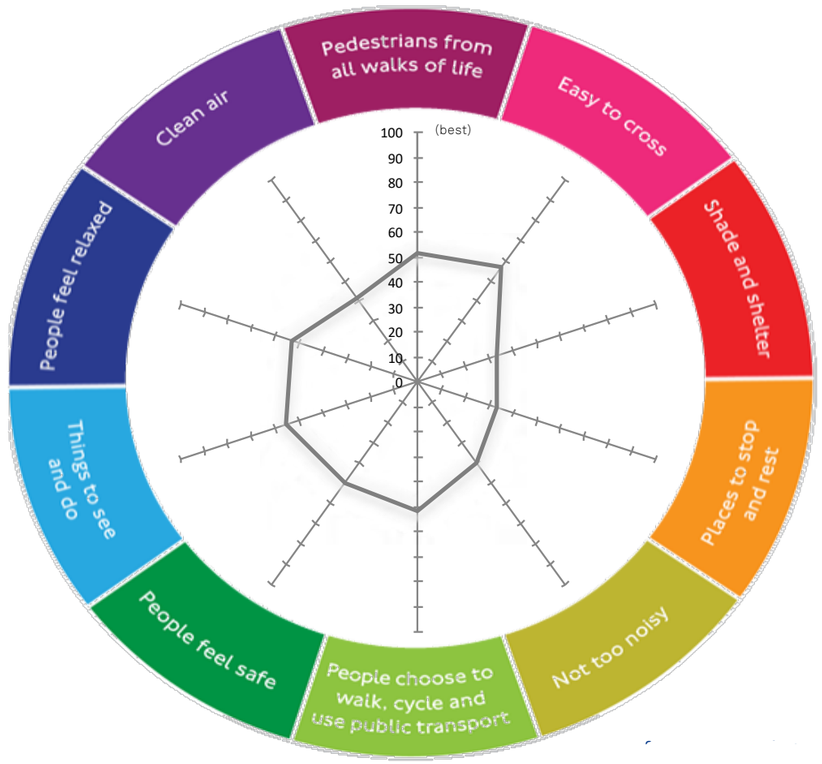
Quality of place

The existing station has a single entrance to the station from the north side of New Cross Road. The road is an active High street, more intense to the west therefore with opportunity for additional active frontages around the station. New and recent development sites exist to the north west along bond house and Hatcham Works, New Cross Gate Sainsburys sits to the north east of the station.

Healthy streets check for designers comments

— High volume of traffic affects noise and air pollution
— New Cross Road creates a significant severance between the two sides of the road with a single and long wait signalised crossing in the immediate surrounding
— Footways are narrower than standard where the pedestrian flow is busy
— There is a lack of seating and shelter points around the station
— Few cyclists use the carriage way, the only option available
— There is minimal amount of trees and other greening

Healthy streets check for designers



Healthy Streets Indicator scores (%)

	Existing layout
Pedestrians from all walks of life	52
Easy to cross	57
Shade and shelter	33
Places to stop and rest	33
Not too noisy	40
People choose to walk, cycle and use public transport	52
People feel safe	50
Things to see and do	56
People feel relaxed	53
Clean air	42
Overall Healthy Streets Check score	51
Number of 'zero' scores	4

4.0
NEW CROSS GATE

Opportunities

There is opportunity to widen pedestrian paths around the station area, reduce the amount of guarding and clutter and include more greening and seating to create a more attractive environment by extending the rail bridge to the south.

There is opportunity to add traffic reduction measures to improve pedestrian and cycle environment.

There is opportunity to improve cycle infrastructure to allow for good connections with side streets and other routes, allow for enough space for vehicle and cycles and avoid opposite direction other not appropriate uses.

Many pedestrians cross New Cross Road across the desire line towards the bus stop on the other side of the station which more than 50m distance from the only one, therefore there is opportunity for additional crossings.

There is opportunity to consolidate loading areas, service access and pedestrian flow in key locations.

There is opportunity for improved and secured cycle parking to respond to obvious demand around the transport interchange.

5.0
LEWISHAM

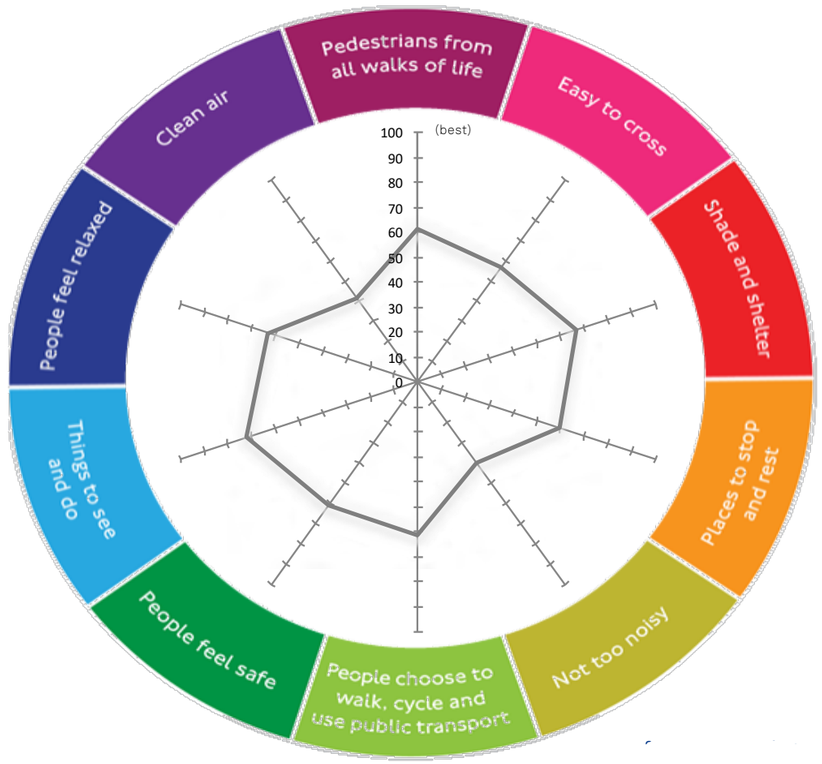
Quality of place

There are two existing stations one for railway and other for DLR. The observed Rennell Street (A20) makes a 90 degree turning which includes a rail over-bridge and there are significant level changes between station and surrounding areas. New and recent development sites and Lewisham Shopping Centre exist to the south-east, Lewisham Retail Park, Carpetright and Glass Mill Leisure Centre to the south-west, Tesco site sits to the north with access through underpass from west.

Healthy streets check for designers comments

- Volume of traffic affects noise and air pollution
- Rennell Street creates a significant severance between the station and the new leisure centre with a single and long wait signalised crossing located on the other side of the railway over-bridge
- Footways are wide and generous however there is very little places to stop or shelter
- Due to the significant rail infrastructures the street frontages are primarily inactive providing little interest for pedestrians, and limiting overlooking for safety
- Few cyclists use the carriage way, the only option available
- There are some trees next to new developments but a minimal amount of other greening

Healthy streets check for designers



Healthy Streets Indicator scores (%)

	Existing layout
Pedestrians from all walks of life	61
Easy to cross	57
Shade and shelter	67
Places to stop and rest	60
Not too noisy	40
People choose to walk, cycle and use public transport	61
People feel safe	61
Things to see and do	72
People feel relaxed	63
Clean air	42
Overall Healthy Streets Check score	60
Number of 'zero' scores	1

5.0
LEWISHAM

Opportunities

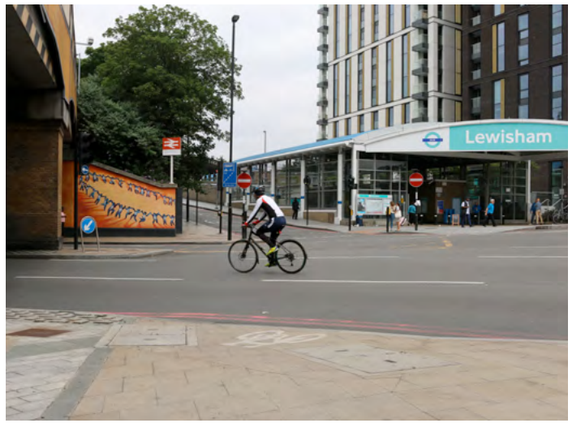
There are opportunities to unify all rail infrastructure through wayfinding and public realm design, as well as the significant new infrastructure of the BLE.

There is opportunity to address level changes with more accessible solutions through improved public realm interventions.

There is potential to rationalise bus/cycle and pedestrian flow at the junction from Station Road to Rennell Street.

There is potential to include more stopping and waiting points and shelter areas for resting in the surrounding areas to respond to the significant pedestrian flow.

There is potential to activate blank walls and hoardings to create a more vibrant place while new development works happen.



There is opportunity to improve cycle infrastructure particularly at the 90 degree turning point at Rennell Street.

6.0
LADYWELL

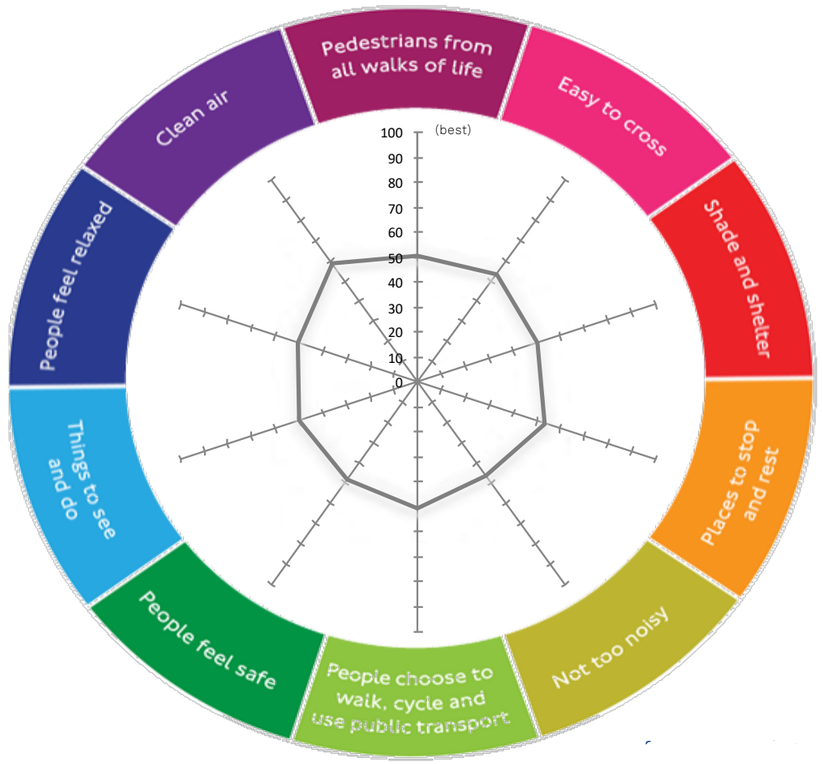
Quality of place

The existing station has two entrances to the south east of the junction between Ladywell Road and the rail corridor; one stepped from the highway bridge over the railway, with the other a ramped vehicular access. The small town centre sits to the east of the railway with Ladywell Fields to the south west. New and recent development sites exist to the north with RUSS, a Community Land Trust site is being developed just further north again.

Healthy streets check for designers comments

- Significant traffic movements exist going in both directions along Ladywell Road, including a high proportion of large vehicles
- Side roads crossings and some of the main crossings are raised tables however some desire lines are not covered
- The volume of traffic creates conflict between drivers entering and exiting side roads, with significant corner radii making pedestrian movements difficult
- There is a lack of seating and shelter points around the station
- Cyclists are mixed with general traffic on single carriageway roads
- Potential to better link town centre with cycle and walking access to Ladywell Fields and the adjacent Lewisham Hospital
- There is some amount of greening and recently improved public realm in Ladywell town centre, however, the rail bridge and eastern approach lacks quality

Healthy streets check for designers



Healthy Streets Indicator scores (%)

	Existing layout
Pedestrians from all walks of life	51
Easy to cross	53
Shade and shelter	50
Places to stop and rest	53
Not too noisy	47
People choose to walk, cycle and use public transport	51
People feel safe	48
Things to see and do	50
People feel relaxed	51
Clean air	58
Overall Healthy Streets Check score	51
Number of 'zero' scores	5

6.0
LADYWELL

Opportunities

Potential to create more direct crossing opportunities to station including reducing barriers to informal crossing.

Legibility and access to station is poor. Historic station building set-back from high street, with green back-drop of rail corridor and Ladywell Fields beyond. Potential to link greening to town centre through new proposals, while retaining heritage structures.

Railway and Ravensbourne River create east-west severance, navigated by the tall highway bridge. Potential to improve crossing access and cyclability.

Existing raised tables to assist pedestrian movements across side roads could see reductions in corner radii to reduce traffic speeds and crossing times.

Recently improved public realm in town centre, with attractive shop frontages, historic features greening and bike stands. Trees and awnings offer shade and interest and street activity creates a safer feeling environment.

7.0
CATFORD BRIDGE

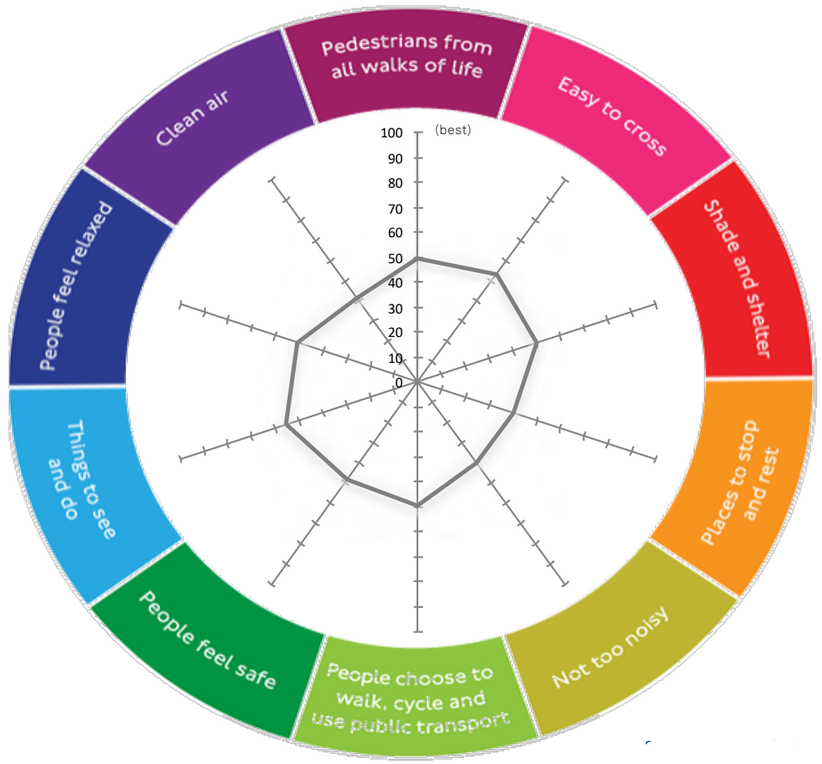
Quality of place

The existing railway station has two stepped entrances to Catford Road (the rail corridor) each from one side of the rail, and a main entrance to Doggett Road with ramped vehicular access. The small town centre sits to the east of the railway with the Jubilee Grounds to the south east. New and recent residential development sites exist to the north-west. Wickes and Halfords industrial site sits to the south-west and Catford Shopping Centre/ Milford Towers and Laurence House to the west.

Healthy streets check for designers comments

— Volume of traffic affects noise and air pollution
— There is a lack of possibilities to cross the street
— The signalised crossing from one side to the other consist of minimum three phases
— Footways are narrower than standard for the amount of pedestrian using them
— There are very little seating and sheltered areas around the station
— A significant amount of cyclists use the carriage way the only option available and sometimes the footway in a very congested road, having to zigzag between cars to make their way. Also clashing with large vehicles
— There is little amount of trees and other greening

Healthy streets check for designers



Healthy Streets Indicator scores (%)

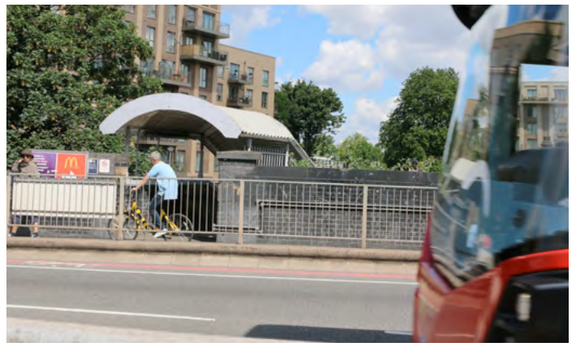
	Existing layout
Pedestrians from all walks of life	49
Easy to cross	53
Shade and shelter	50
Places to stop and rest	40
Not too noisy	40
People choose to walk, cycle and use public transport	49
People feel safe	48
Things to see and do	56
People feel relaxed	51
Clean air	42
Overall Healthy Streets Check score	49
Number of 'zero' scores	3

7.0
CATFORD BRIDGE

Opportunities

There is opportunity to improve station arrival by reducing car park, improving pedestrian paths and adding wayfinding.

There is potential to increase pedestrian paths add more crossings along the rail bridge by extending the rail bridge to the south.



There is opportunity to improve cycle infrastructure, which is currently very limited.

Potential to add measures to reduce traffic volume towards the main street.

8.0
LOWER SYDENHAM

Quality of place

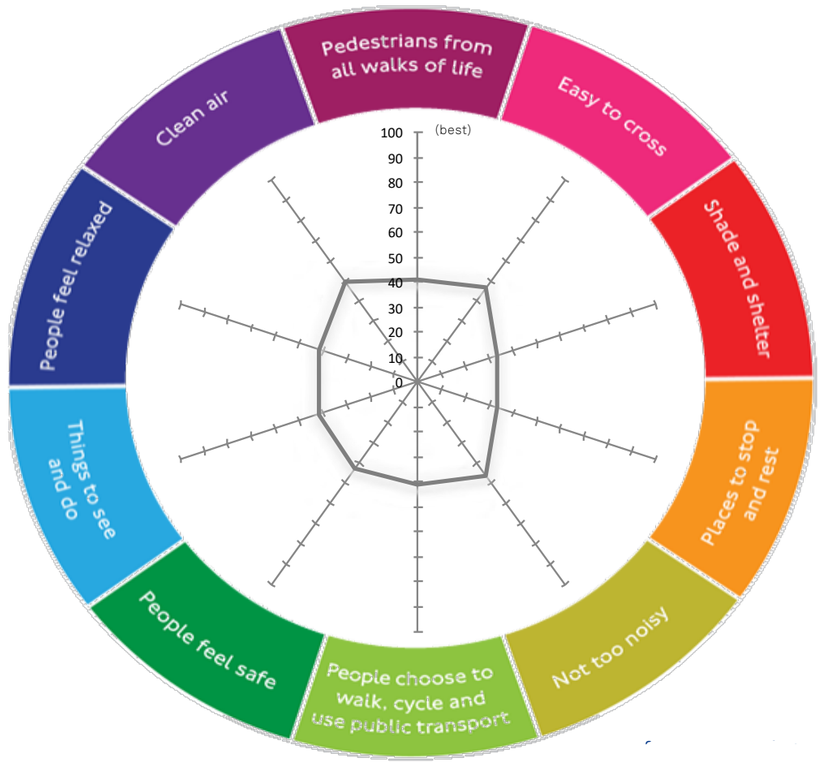
The existing railway station has access from both sides of the railway through secondary roads, separated from main adjacent roads. New and recent development sites exist to the south-east and all the other surrounding sites are industrial such Lewisham Indoor Bowls Centre, Worsley Bridge Road and Bridge Leisure Centre.

For the Healthy Streets check Stanton Way and Southend Lane junction has been chosen, located 400m north. This relates to the current proposal to supersede the existing station position with a combined station at this location. Adjacent to this location is Stanton Square site already being developed as well as Sainsbury's and former Bell Green Gas holders.

Healthy streets check for designers comments

— Volume of traffic affects noise and air pollution
— Both Stanton Way and Southend Lane create a significant severance between the station approach to potential new development sites Stanton Sq, Sainsbury's Bell Green and former Bell Green Gas Holders
— The signalised crossing from one side to the other consist of minimum three phases
— Footways are narrower than standard but not many pedestrian were observed in the surroundings
— There are no seating and shelter points along the roads
— Few cyclists use the carriage way, the only option available
— There is little amount of trees and other greening
— There is only one active frontage along the road

Healthy streets check for designers



Healthy Streets Indicator scores (%)

	Existing layout
Pedestrians from all walks of life	41
Easy to cross	47
Shade and shelter	33
Places to stop and rest	33
Not too noisy	47
People choose to walk, cycle and use public transport	41
People feel safe	43
Things to see and do	42
People feel relaxed	42
Clean air	50
Overall Healthy Streets Check score	42
Number of 'zero' scores	6

8.0
LOWER SYDENHAM

Opportunities

At the existing railway station: There is opportunity for improving existing railway station presence and wayfinding by potentially enhancing the facade as well as activating blank walls and fences.

Around the existing railway station: There is opportunity to improve access and visibility in the adjacent streets by improving pedestrian paths towards the station and continuing wayfinding. Green assets could be opened up and enhanced.

At Stanton Way and Southend Lane junction, next to Sainsbury's, Stanton Square and former Bell Green Gas holders, roads cause significant severance. There is opportunity to add speed reduction measures, improve crossings by reducing guarding barriers and by making them more direct, avoiding to pass two or more traffic lights wait from one side to the other.

On side roads around Stanton Way and Southend Lane junction, there is opportunity to improve pedestrian paths, add continuous crossings and reduce illegal loading by reconfiguring street.


HATCH
REGENERIS