OCTOBER 2019

Good Growth in London

Planning for London's growth in uncertain times

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We're all trying to forecast and plan for the future...

Central Case

Accelerating London

Innovating London

Rebalancing London
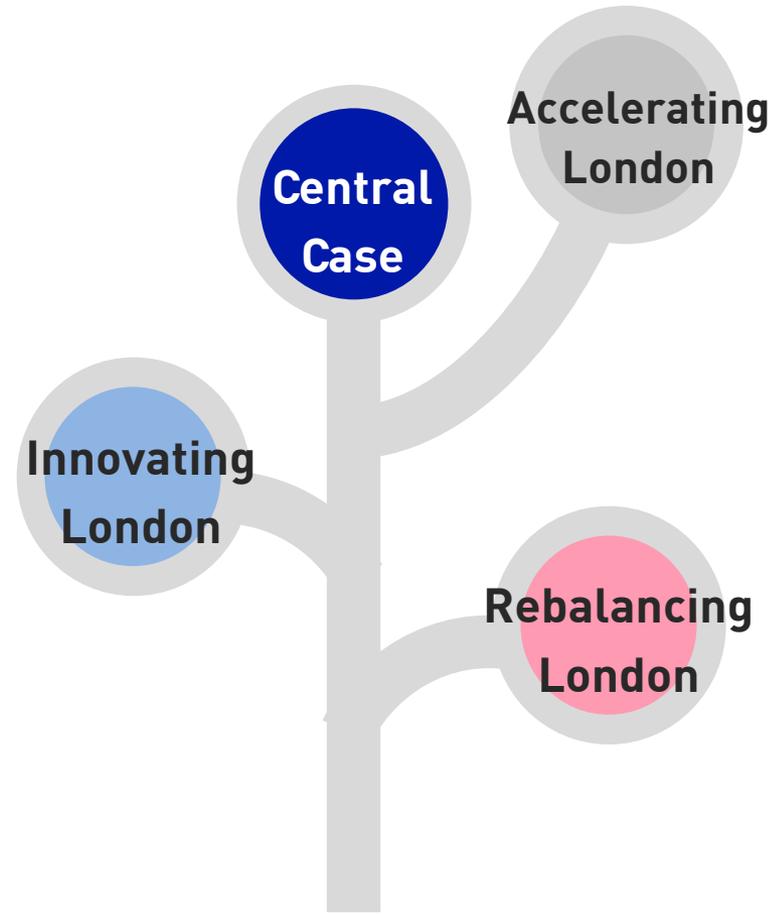
# All the uncertainties means getting the fundamentals right is more important than ever...
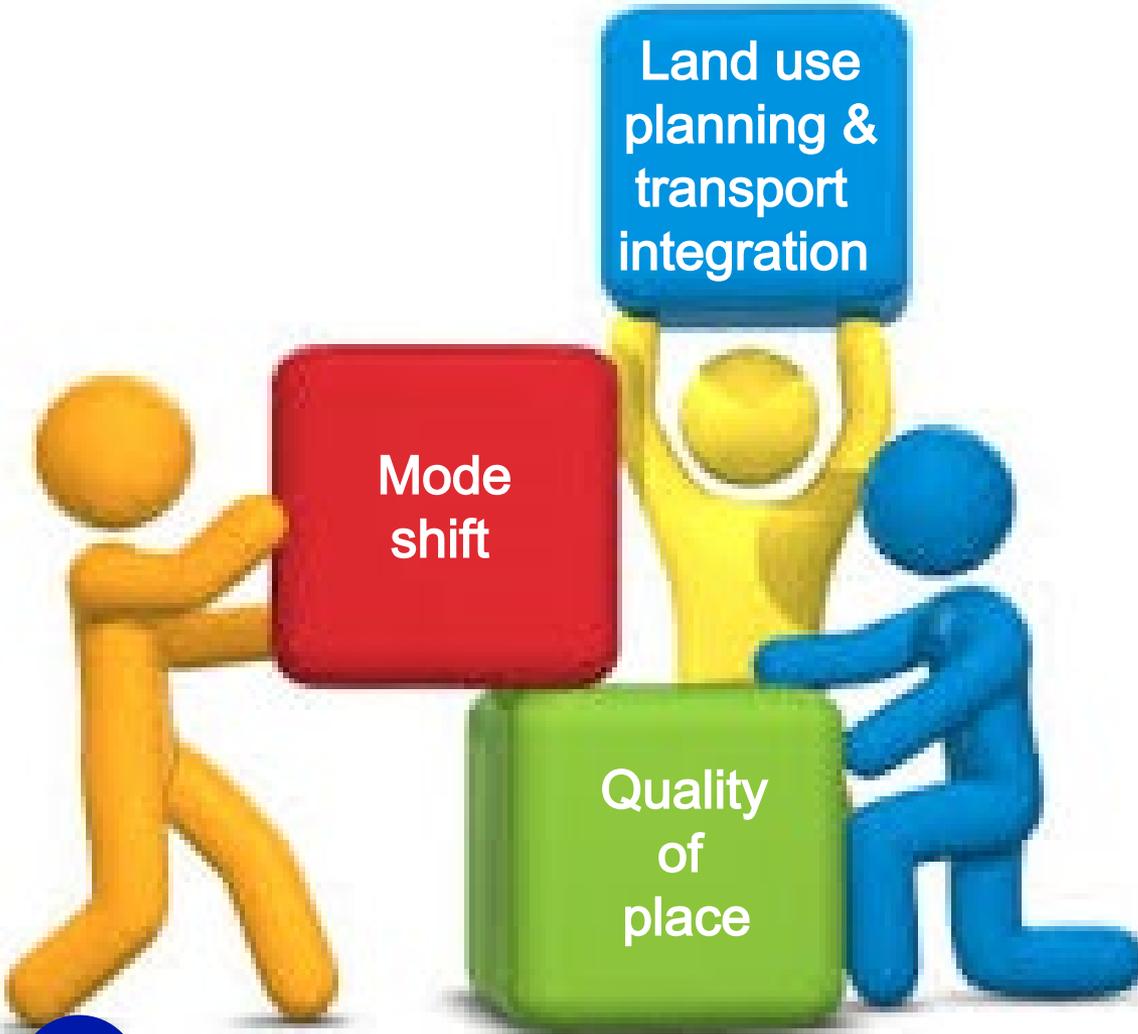
So let's look at how we're planning London's growth 'under the microscope'...

**...integrated planning at each different level**

Level 1: Strategic integration
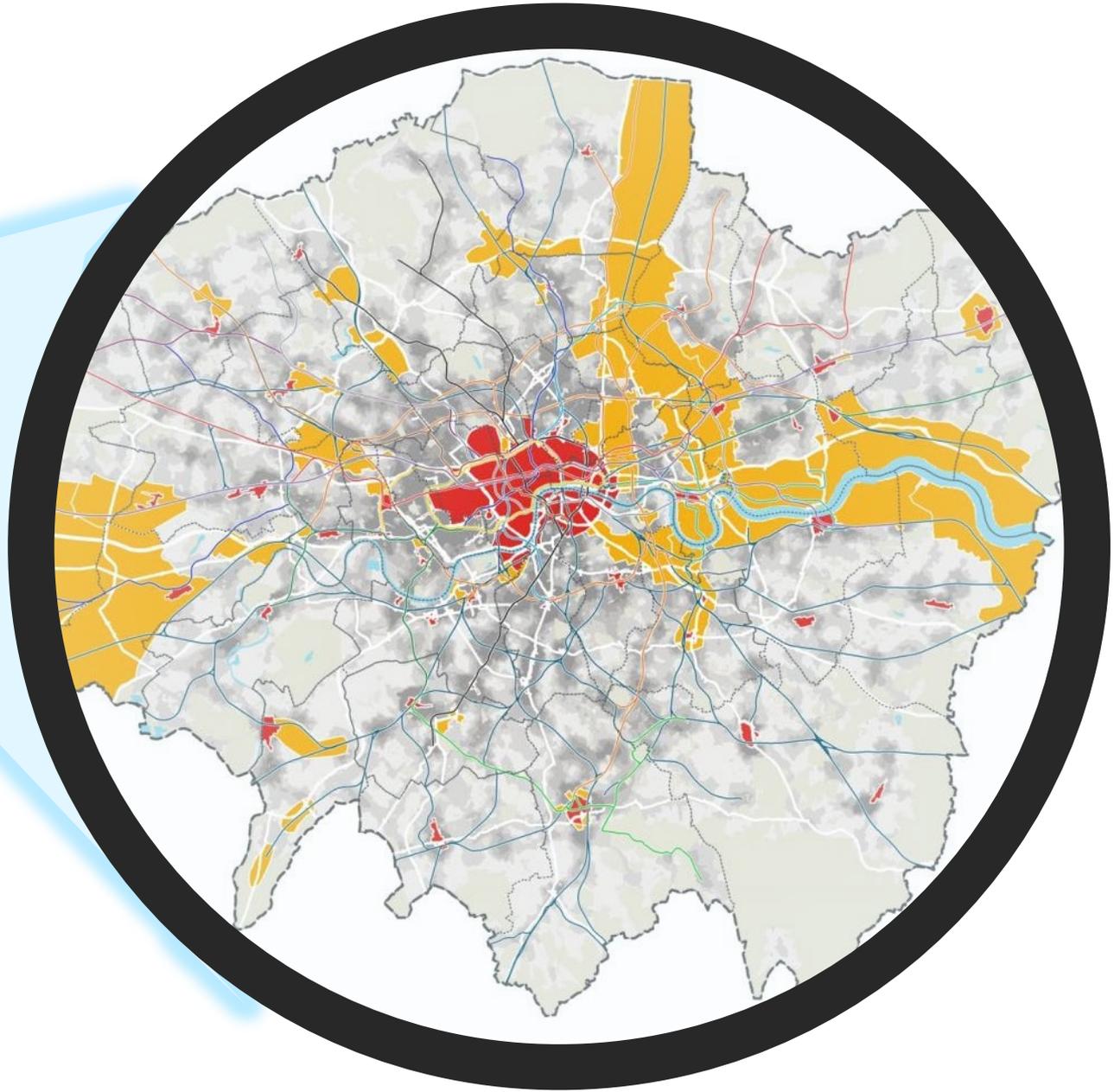
We've got a clear integrated vision for London

- We have integrated transport and land use strategies

- Clear focus on delivering '**Good Growth**'

- The Mayor's Transport Strategy has 3 key themes:

  1. Healthy Streets and healthy people
  2. A good public transport experience
  3. New homes and jobs

- Core element = ambitious mode share target

2015
26.7 million daily trips
36%
64%

2041
32 million daily trips
20%
80%
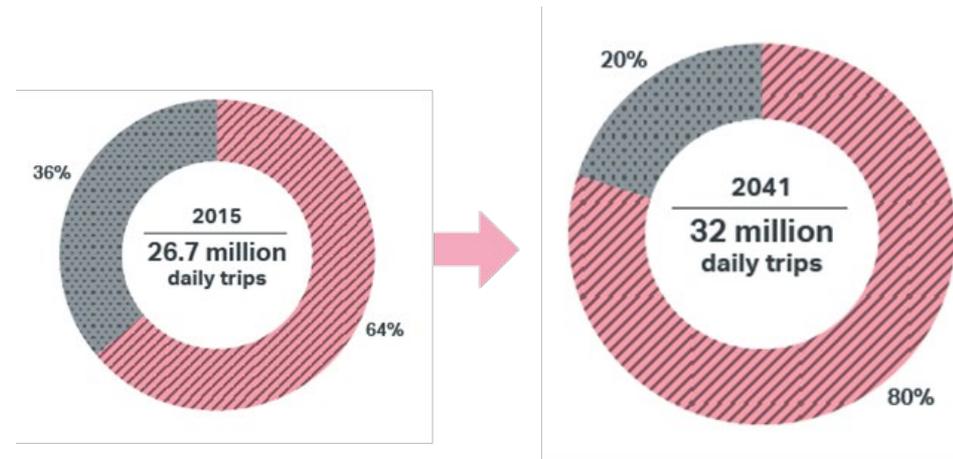
Walking, cycling & public transport | Car/taxi/PHV

Denser development supports transport outcomes

Population Density (usual residents per hectare, average at ward level)

Ward Level Mode Share (Lines) or % of London population within density band (Bars)

Legend:
- % of London population (Central)
- % of London population (Inner)
- % of London population (Outer)
- Average Car Mode Share within band
- Average PT Mode Share within band
- Average Active Mode Share within band

66,000

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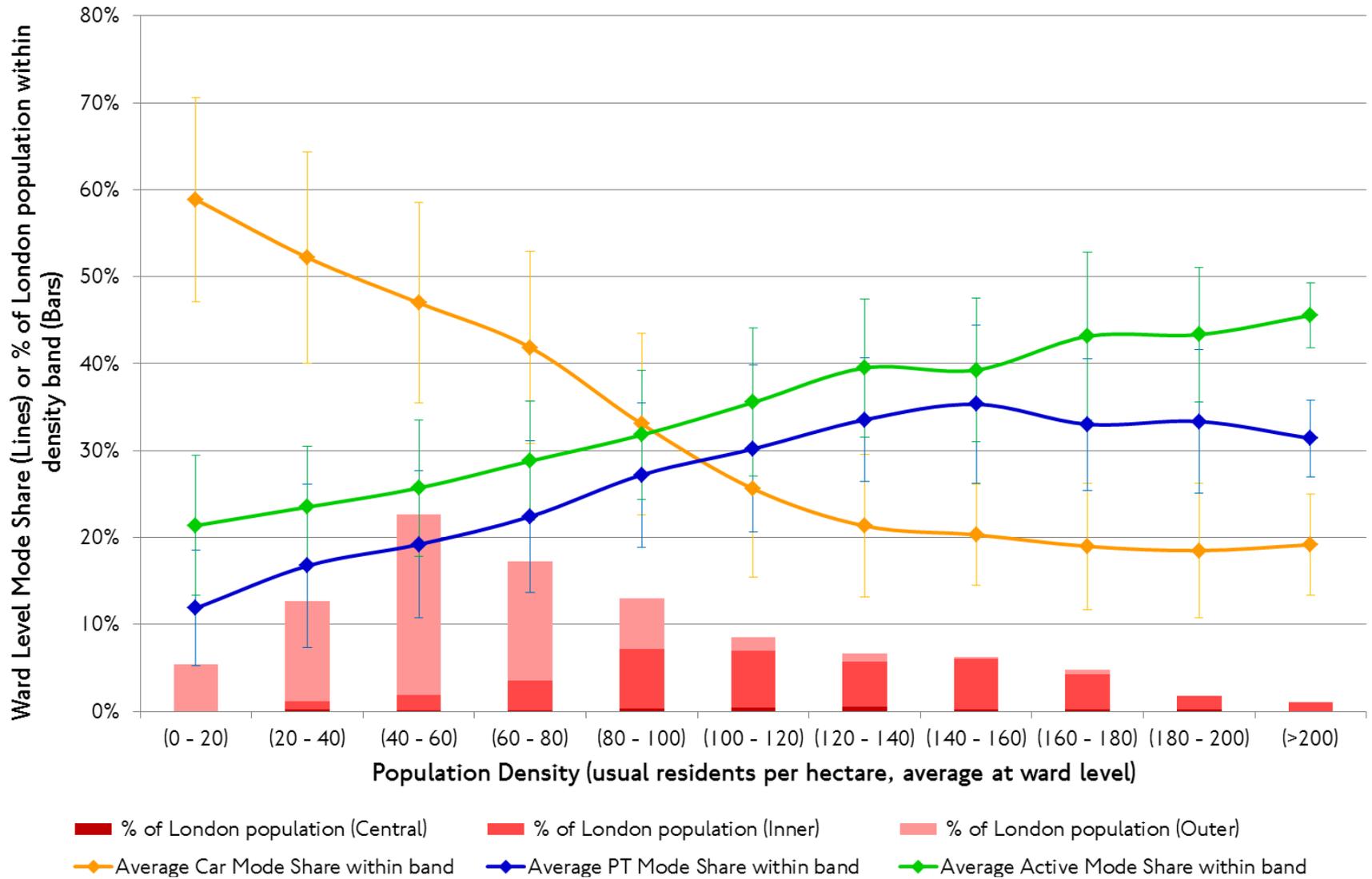
88,000

Level 2. Transport Growth Corridors

x5
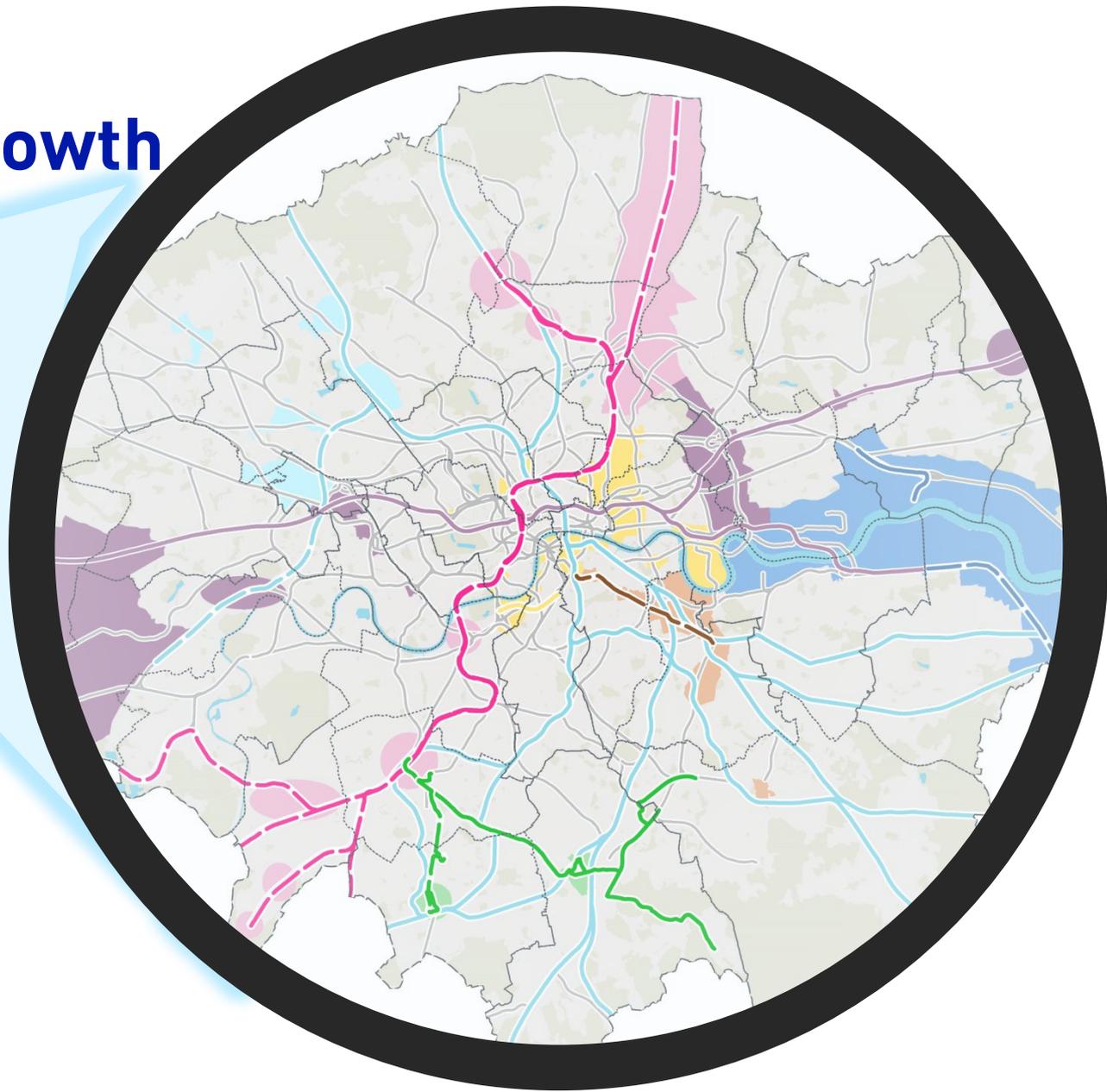
Transport growth corridors provide a key focus
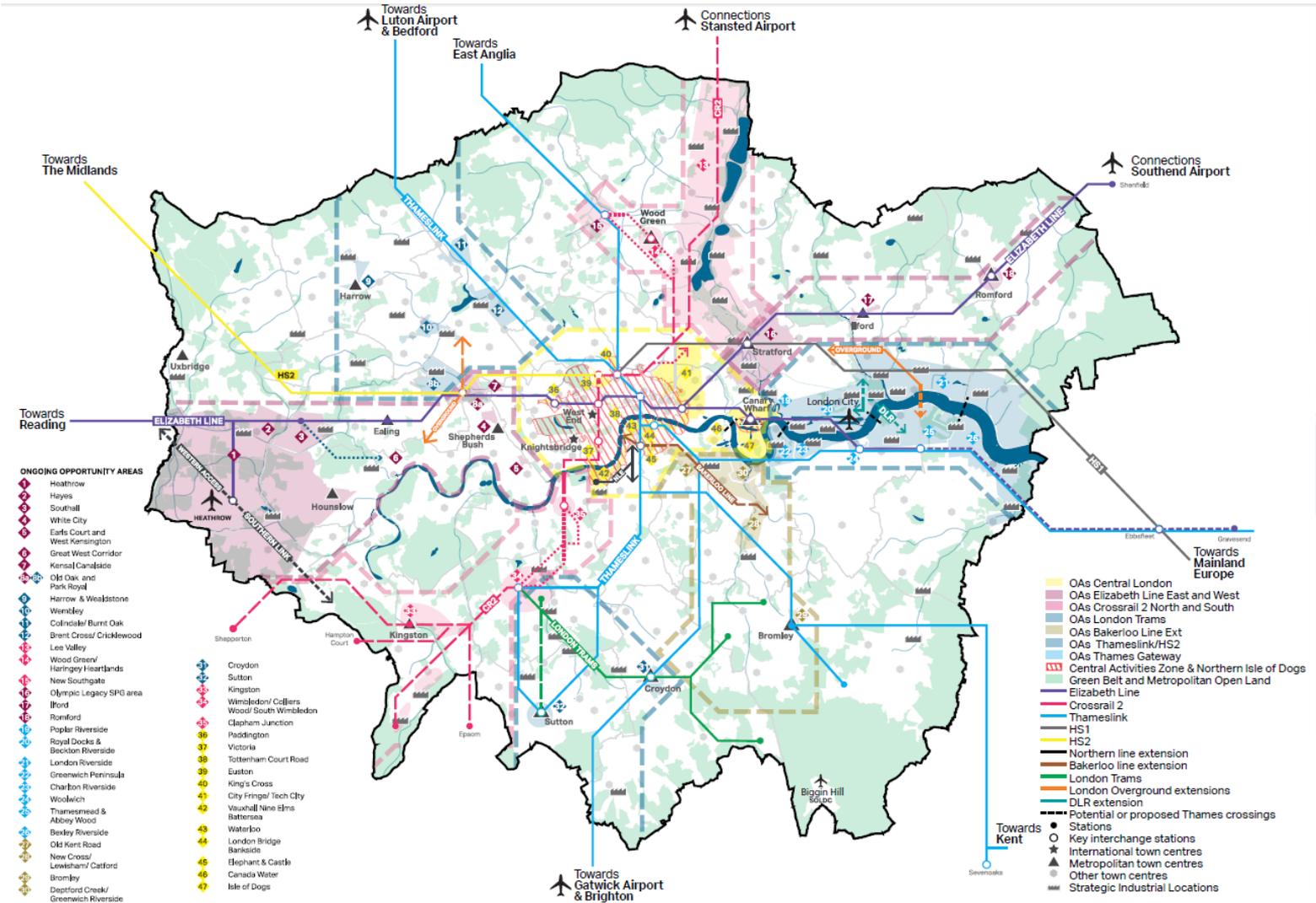
And new transport schemes offer big opportunities

Key Regeneration Clusters along the Crossrail 2 Corridor

Area targeted to deliver significant housing in catchment of Crossrail 2 stations or feeder stations

Station and over site development

Key regeneration clusters, where delivery of housing could benefit from support due to complexity, scale and policy context of delivery

Bakerloo line extension / upgrade

Metro-isation

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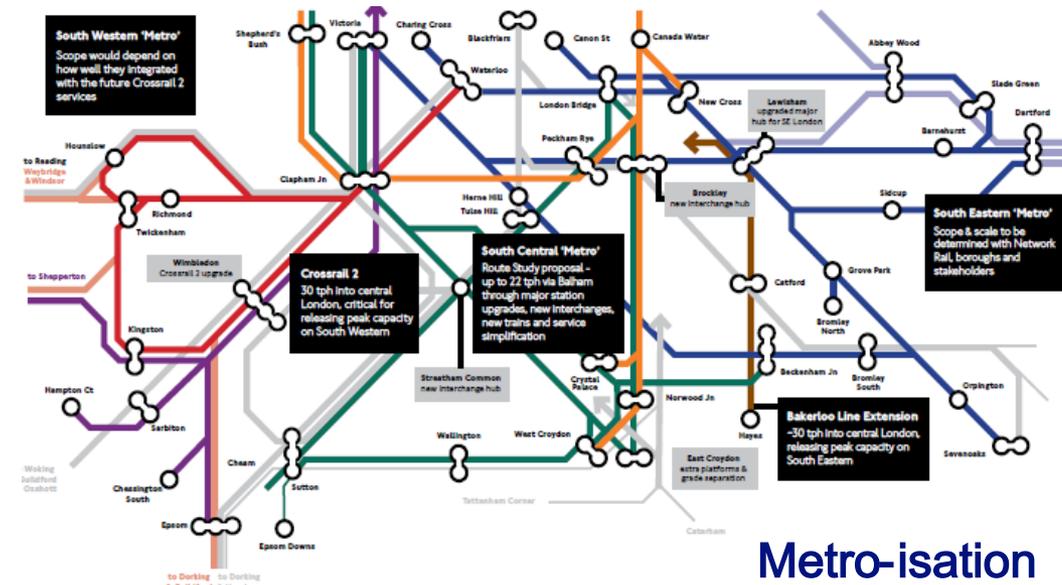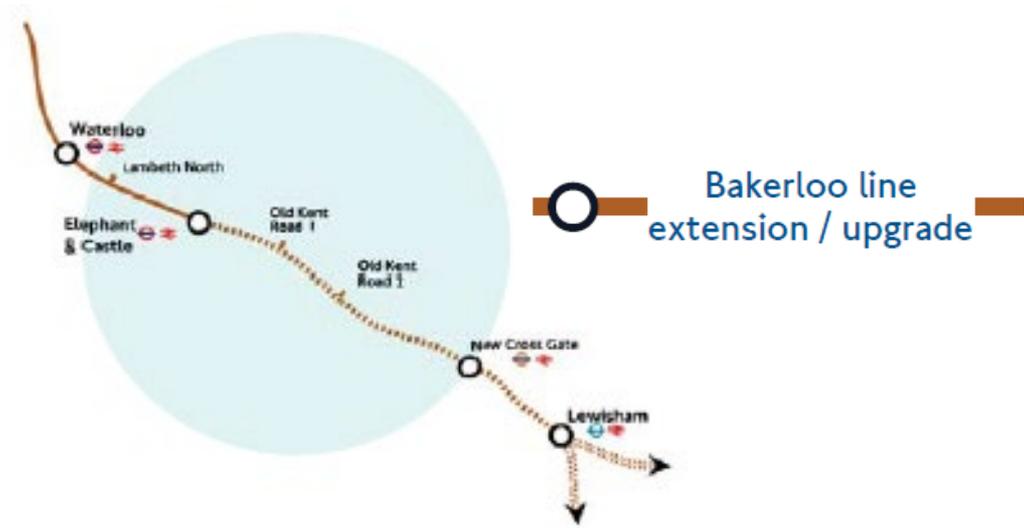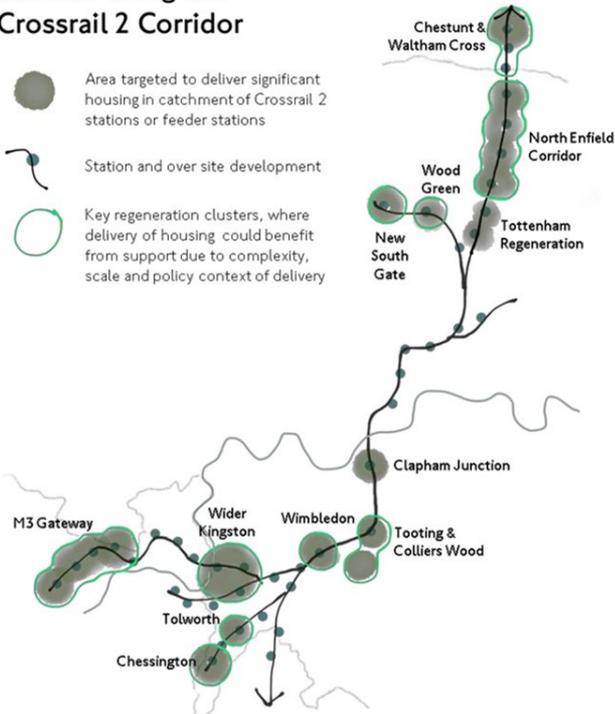
Level 3: Major growth areas

x10

We're focusing on key growth areas that have significant potential

- 47 Opportunity Areas across London

- Important in bringing stakeholders together around key issues—evidence base; land use; funding; infrastructure and delivery

- For example: Isle of Dogs and South Poplar; Old Oak Common; Thamesmead and Abbey Wood; Royal Docks; Canada Water; Barking Riverside

Legend

Boroughs
Areas of Intensification
Opportunity Areas
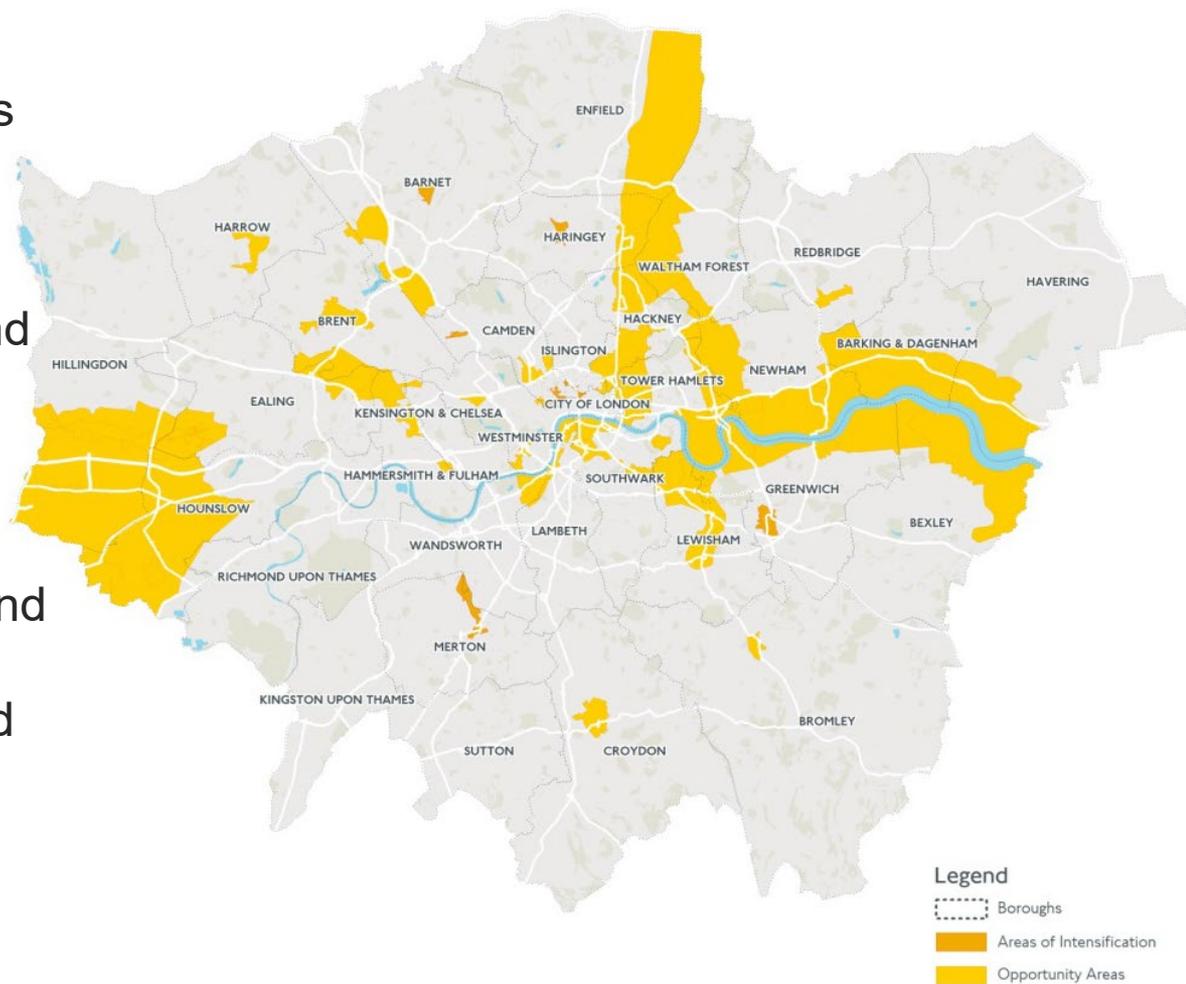
We're targeting the TfL Growth Fund to unlock particular transport constraints

- The TfL Growth Fund provides targeted support to sites where transport is a barrier to development

- These sites could support in excess of 50,000 housing units

- Leverages significant third party contributions
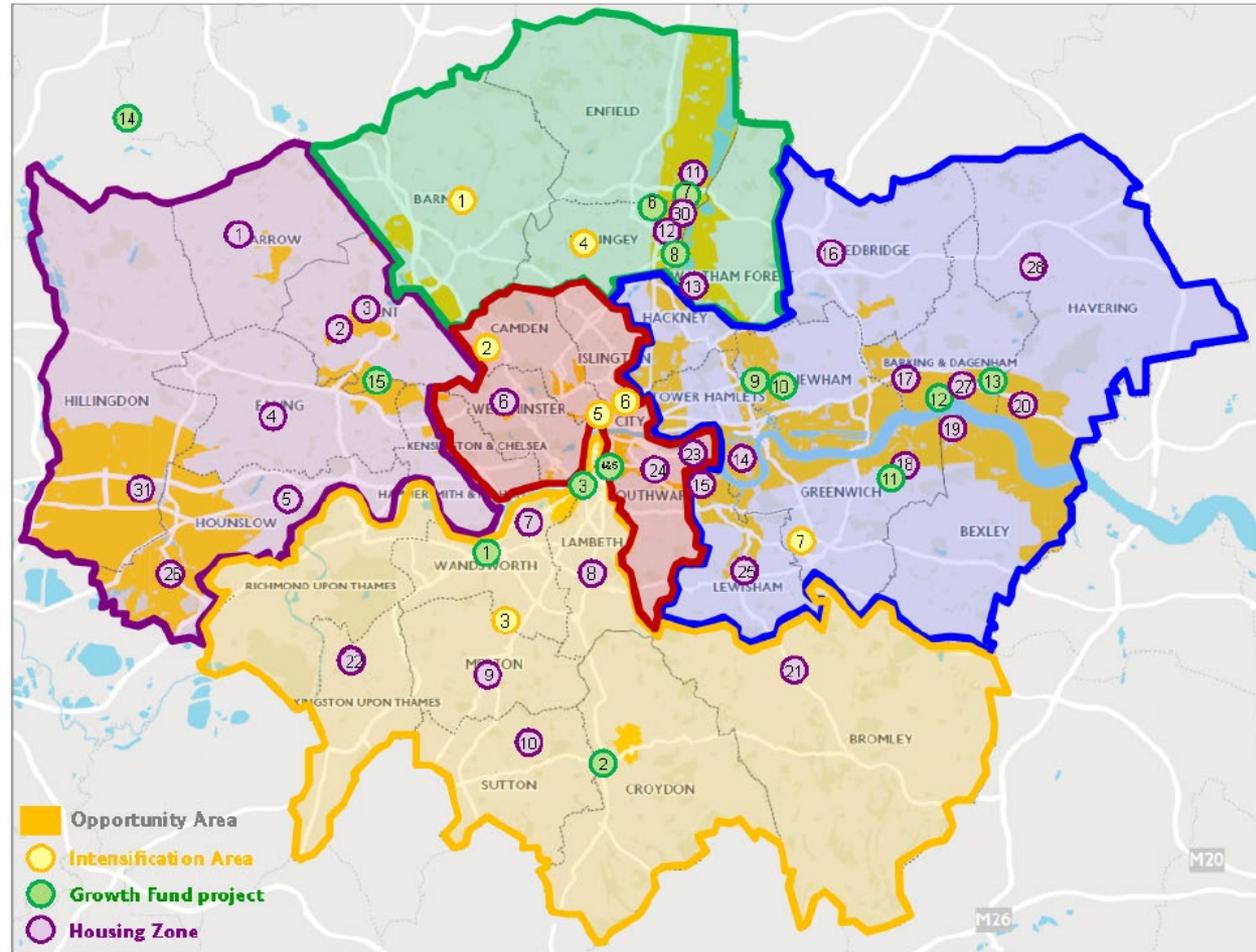
As well as Government's Housing Infrastructure Fund

- Housing Infrastructure Fund (HIF) is a £5.5bn Government capital grant programme

- Aimed at infrastructure which can directly unloc[k] the delivery of new homes across the UK. Schemes in London approved to date include:

  DLR – £291m for 14 extra trains, depot space, new station at Thameside West, development at Poplar, to support 18,000 new homes

  East London Line – £81m for increased frequency, an upgrade to Surrey Quays station and a new station at Surrey Canal Road to support 14,000 new housing units.

  Meridian Water – £156m, including upgrade frequency on the national rail network in the Le[a] Valley and support 10,000 units planned for this key site in Enfield.

HM Treasury @hmtreasury

Follow

"A further £500m for the Housing Infrastructure Fund, to unlock 650,000 homes." 🏗️ 🏠 #Budget2018
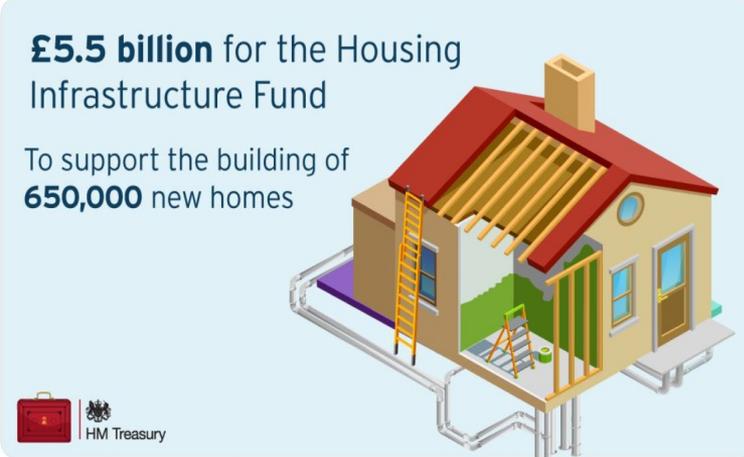
£5.5 billion for the Housing Infrastructure Fund

To support the building of 650,000 new homes

HM Treasury

9:21 am - 29 Oct 2018

292 Retweets 219 Likes

27   292   219

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Level 4.
Local level

x15

We're seeking to support Good Growth in outer London through integrated improvements including rail, bus and active travel improvements

- Many trips currently made by car could be made by sustainable modes instead.

- Need to make the most of the existing national rail network

- Opportunities to extend public transport: orbital rail; tram; BRT, increased bus services

- New opportunities eg DRT; car sharing

- Healthy Streets approach to transform environment for walking and cycling.

Level 5:
Individual sites

We seek to shape individual developments...

- TfL – defined role in planning system to manage impacts on transport.

- We work as early as possible with developers and boroughs to embed:

  Good design to promote active travel

  Sustainable policies eg minimal car parking; increased cycle parking;

  Plans to manage impacts eg Delivery & Servicing; Construction Management

- Our urban designers work closely with the GLA to ensure high-quality of streets, public realm, and pedestrian areas

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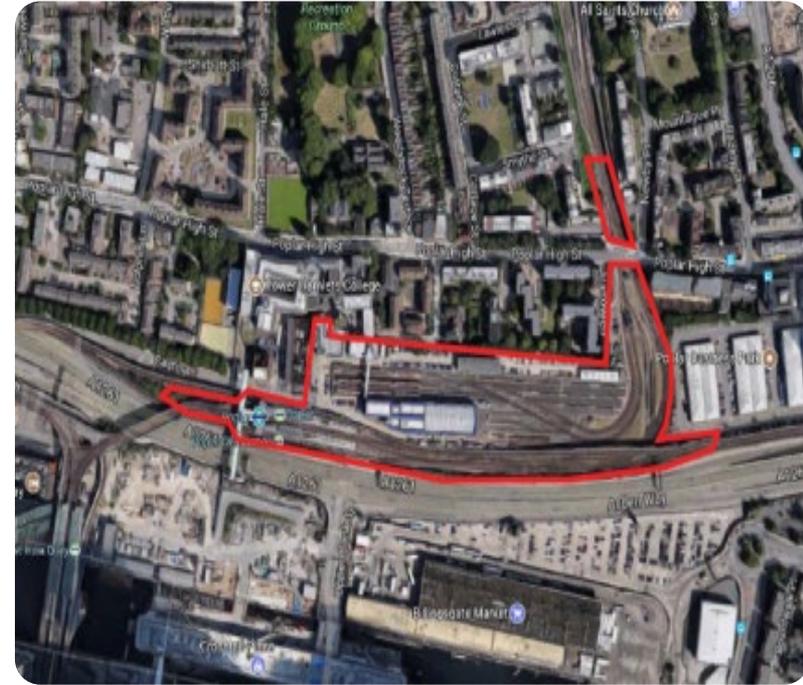
We negotiate with developers to mitigate impacts

- We also negotiate with developers to secure Section 106 'planning obligations' – to mitigate impacts.

- Contributions include eg additional bus capacity; station improvements; junction enhancements; cycle hire docking stations etc.

- We also secure Section 278 (highway works) – designed in line with key objectives eg healthy streets; safety.

- We also collect and administer the Mayoral Community Infrastructure Levy on behalf of the Mayor, to fund major transport infrastructure.

Town and Country Planning Act 1990

An Act to consolidate certain enactments relating to town and country planning (excluding special controls in respect of buildings as of special architectural or historic interest and in respect of hazardous substances) with amendments to give effect to recommendations of the Law Commission.

Section 106 Planning Obligations
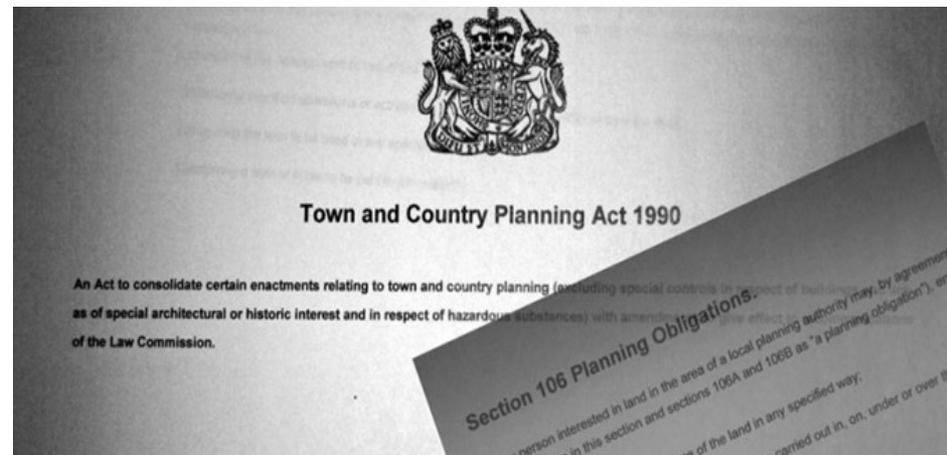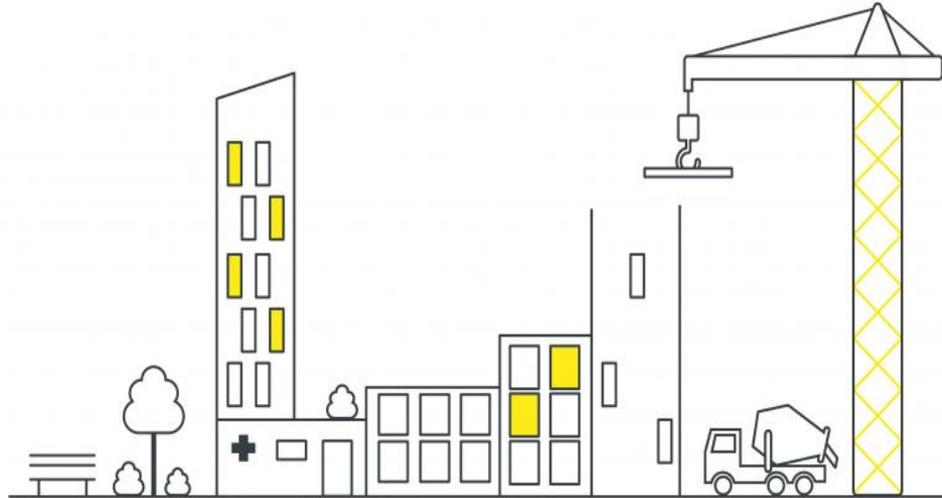
To achieve good growth, we need to change travel behaviour...

Principles of Good Growth include:

- High density, mixed use developments

- Good access to public transport

- People choose to walk and cycle

- Car-free and car-lite places

- Inclusive, accessible design

- Carbon-free travel

- Efficient freight

And we're delivering housing on our own sites

1

We will **deliver** 10,000 homes

2

Deliver

50%

affordable housing across our portfolio

3

Generate

vital revenue to reinvest in the transport

4

Provide

transport infrastructure improvements

5

Create

Healthy Streets and neighbourhoods
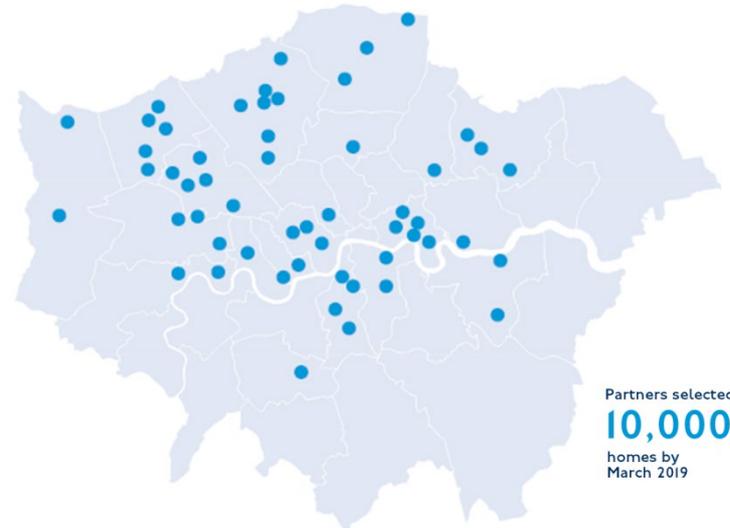
Partners selected for

10,000

homes by March 2019

But funding is a key source of uncertainty / challenge

- There are some funding challenges currently

- We're making significant efficiencies / savings

- Our funding mix is changing

- But current sources are insufficient to deliver all the schemes identified, so we need to look beyond these...

1. Loss of central Government grant

2. Economic / wider context

3. Crossrail
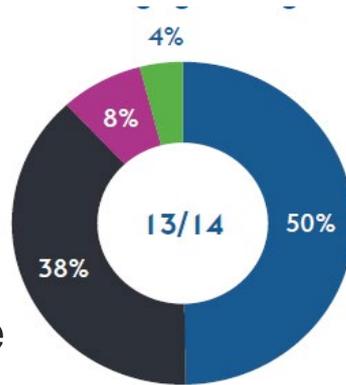
■ Fares	■ Grants	■ Other income	■ Property/assets	■ Borrowing
Fares will grow from half to two thirds of income – making us more exposed to changes in the economy	Loss of General Grant already impacted. Remaining grant does not grow at rate required	Charging and commercial income doubles in importance to us over the plan (see section 6)	One off benefit in 18/19 from Elizabeth line fleet sale/leaseback will not be repeated	23/24 is first year TfL is not planning to borrow.
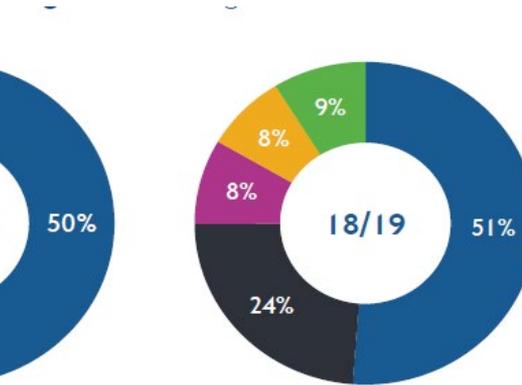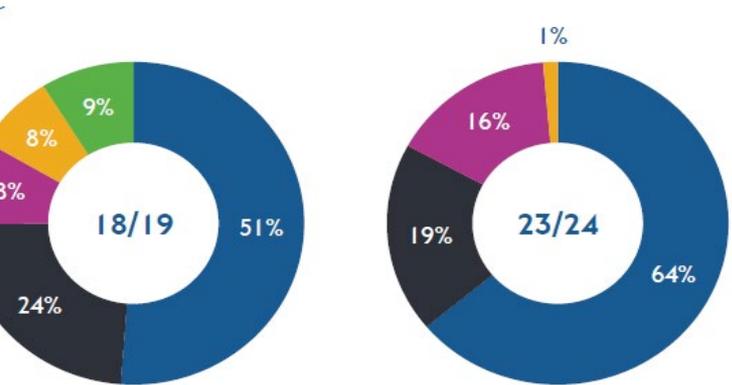
We're seeking to optimise revenue streams and capture new funding opportunities

- Continue to make the case to Government for funding

- Maximise benefits of our own assets eg OSD; new focus on Build to Rent; transforming our advertising estate; improving retail presence

- Work with partners to explore range of existing & new mechanisms eg BCIL; Enterprise Zones; WPL

- Seek to better capture value uplift generated by transport investment

Continue to make the case to Government eg Piccadilly Line upgrade

Piccadilly line re-signalling

Over-station Development eg Tottenham Court Road

Hybrid Funding Packages eg Crossrail 2

£ billion real 2014 Q2 prices

Operating surplus	£4.4bn 15%
Business Rates Supplement	£5bn 17%
Mayoral CIL	£4.3bn
Resale of Land and Property	£2.8bn 9%
Total London Contribution	£16.4bn 56%
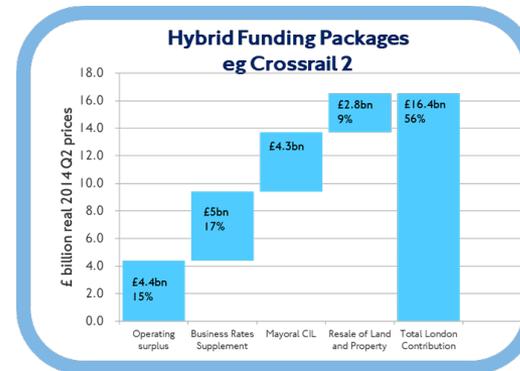
Enterprise Zones eg Royal Docks

How we pay for road use

1) What is a Workplace Parking Levy (WPL)?

Land value capture opportunities

Despite uncertainties, integrated planning at every level should help deliver 'good growth'

- Integrated strategies and clear vision

- Good Growth / optimised densities around existing and new public transport links

- Unlocking the potential of our Opportunity Areas

- Ensuring local connections and good places

- Delivering new London Plan policies in practice (including parking standards and Healthy Streets) –

- Promoting mode shift to support more sustainable growth and achieve key outcomes for our city

80%

THANK YOU

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