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Dear Sir

Call for Evidence: National Infrastructure Challenges

In response to the Commission's call for evidence dated 13th November 2015, please find attached a submission from the Thames Gateway Kent Partnership (TGKP). This covers two of the three topics included in the call for evidence:

- Connecting northern cities
- London's Transport Infrastructure.

Our submission draws the Commission's attention to the importance of connectivity to, as well as between, northern cities. The Channel Ports to M25 corridor, through the Thames Gateway, has a crucial role in connecting the Midlands and North of England to international markets and supply chains, and a holistic approach is needed to infrastructure investment to ensure that corridor can deliver both the capacity and resilience to sustain forecast growth.

We welcome the Commission's focus on the economic and social challenges facing London and its commuter hinterland. The Thames Gateway provides the greatest potential to support London's growth as well as regionally and nationally significant economic opportunity in its own right. There are key transport infrastructure investments required to fulfil that potential, in particular the need for enhanced rail network capacity in North Kent and South East London. Extension of Crossrail 1 from Abbey Wood to Gravesend could be part of the solution. We invite the Commission to engage with the outcomes of work being led by Transport for London and sponsored by TGKP and other partners regarding the business case for such an extension.

I trust this paper will assist the Commission and we would be happy to discuss further.

Yours faithfully

Rob Bennett, Chairman, Thames Gateway Kent Partnership

<u>National Infrastructure Commission – Call for Evidence</u>

Submission by the Thames Gateway Kent Partnership

1. The Thames Gateway Kent Partnership (TGKP) is a public-private partnership, established in 2001, that promotes sustainable economic growth and regeneration in North Kent.
2. TGKP has a direct interest in the second topic on which the Commission is calling for evidence, and indirect interest in the first. The purpose of this submission is both to draw the Commission's attention to issues and evidence from the Thames Gateway pertinent to the Commission's programme, and to underline the continuing importance of the Thames Gateway itself as a national priority for infrastructure investment, to inform the Commission's advice to Government.

The Thames Gateway

3. The Thames Gateway originated from the "East Thames Corridor" development capacity study carried out for the then Department of Environment in 1991-93. The Gateway's status as a priority area for growth and regeneration was formalized in Regional Planning Guidance 9a "The Thames Gateway Planning Framework", and subsequently reflected in the South East Plan and numerous Government strategy documents and delivery plans.
4. Up until 2010, successive Governments invested in substantial investment programmes in the Thames Gateway, working through local delivery vehicles including development corporations for London Thames Gateway and Thurrock and, in North Kent, the Kent Thameside Partnership, Medway Renaissance and Swale Forward. In Kent, these major investments included the creation of Ebbsfleet International Station and HS1, the A249 Sheppey Crossing, A2 widening and re-alignment between the M25/J2 and M2/J1, the Universities at Medway campus at Chatham Maritime, and major brownfield land regeneration schemes such as Rochester Riverside, St Mary's Island, Queenborough & Rushenden and Northfleet Embankment.
5. The Coalition Government abolished the Regional Development Agencies and Regional Planning frameworks in 2011 and the remaining delivery vehicles and dedicated programmes were also wound up. But the Thames Gateway continues to enjoy Government support as a strategic initiative: it is a specific responsibility of DCLG Minister Rt Hon Mark Francois MP, and is overseen by the Thames Gateway Strategic Group, chaired by Sir Edward Lister (Deputy Mayor of London) and attended by the Thames Gateway Minister and business and political leaders from across the Gateway.
6. The Thames Gateway remains the most significant opportunity for transformational growth in London and the South East. Current and emerging plans identify potential for 270,000 new homes and 360,000-390,000 new jobs in the years to 2031. The Thames Gateway reflects a long-term vision to re-focus London's economic future towards the east and support the Capital's role and status as a global city. Private and public Investment in the Thames Gateway has continued, the latter including the prioritization of Local Growth Funding by the South East Local Enterprise Partnership.
7. But the Thames Gateway is about more than jobs and homes: it is also the chief corridor that connects London, the Midlands and the North to continental Europe. The prospects for London, the 'Northern Powerhouse' and 'Midlands Engine' and their access to goods, services, supply chains and markets depend crucially upon getting the right infrastructure investment into the Thames Gateway and into Kent and Medway as a whole.

<u>Connecting northern cities</u>

8. In this section we focus on two of the questions posed by the Commission regarding connectivity between northern cities:

   3. Which city-to-city corridor(s) should be the priority for early phases of investment?

4. What are the key international connectivity needs likely to be in the next 20-30 years in the north of England (with a focus on ports and airports)? What is the most effective way to meet these needs, and what constraints on delivery are anticipated?

9. We understand that the main thrust of the Commission's investigation is about corridors and connectivity in the north. We suggest, though, that it is important for the Commission to consider connectivity to the north, particularly the corridor that connects the UK to its main European neighbours and continental markets. Of primary concern to this Partnership, and to the Thames Gateway, is the corridor from the Channel ports via the existing Dartford-Thurrock crossing that connects the north, Midlands and East of England to continental Europe. This is critical both to the national economy and to the future growth, regeneration and prosperity of the Thames Gateway.

Pressures within the Thames Gateway

10. Population, housing and economic growth in Thames Gateway Kent will increase pressure on the strategic roads network, particularly the A2/M2 corridor serving key locations such as the new Ebbsfleet Garden City. The proposed London Paramount Entertainment Resort (see paragraph 29) will, subject to approval, also add significant visitor and workforce journeys onto both the strategic and local roads (and rail) networks.

11. Analysis of DfT statistics[1] show that motor vehicle traffic in Kent has already grown by 24% since 1994; for Medway the figure is 32%. These compare with England and South East averages of 18% and 17% respectively, and indicate the relatively greater intensification of pressure on the road network in Kent & Medway.

12. Despite the significant investments in transport connectivity in the Thames Gateway Kent area, the lesson from our experience is that the job is not done. Holistic solutions are required both to fulfil the economic potential of the Thames Gateway and to guarantee the performance of the corridors and connections on which the economies of the Midlands and the North heavily depend.

The A2/M2 and A20/M20 Corridors

13. The A2/M2 is already heavily congested with journey time reliability as low as 66% in key sections[2]. The design and capacity issues associated with the Bean and Ebbsfleet junctions on the A2 are acknowledged by Highways England: improvements are programmed for completion by 2023. Improvement of the M2/J5 is a committed future project. The M2 is effectively a bypass for the Medway Towns, Sittingbourne and Faversham as well as a strategic road corridor. Similarly, the M20 is a major distributor road for local journeys, particularly for Ashford and Maidstone, as well as the strategic corridor linking the channel ports to the UK roads network. Consequently these routes and the links between them, such as M20/J6-A229-M2/J3 suffer heavy congestion in peak periods.

14. Across Kent's part of the Strategic Road Network, freight vehicles account for up to 41% of the traffic[3]. In Kent, freight traffic is concentrated on two strategic routes (M20/A20 and M2/A2) with the principal route to the Channel ports being the M20/A20 as part of the TEN-T Trans-European road network. Over the last 20 years, the number of goods vehicles travelling from Great Britain to mainland Europe has increased by 83%[4].

[1] DfT Road Traffic Statistics, Table TRA8901
[2] DfT Statistics, Table CGN0106
[3] Highways Agency (2014) Kent Corridors to M25 Route Strategy Evidence Report https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/364209/Kent_Corridors_to_M25_Evidence_Report.pdf
[4] Department for Transport (2015) Statistical Release: Road goods vehicles travelling to mainland Europe: October to December 2014 (quarter 4) https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/404778/roro-2014-04.pdf

15. The Port of Dover and the Channel Tunnel are nationally important facilities. As the shortest crossing point between the UK and mainland Europe, the Dover Strait ports (Dover, Channel Tunnel and Ramsgate) account for 69% of all goods vehicles or 89% of all powered goods vehicles that travel between the UK and mainland Europe[5]. This generates substantial HGV traffic movements through Kent. Approaches around Dover on the Strategic Road Network suffer from 'moderate' and 'regular' congestion, which by 2040 is forecast to increase to 'regular' or 'severe' congestion in peak periods even with the investment from Highways England's Roads Investment Strategy (RIS)[6].

16. In 2014, 2.4 million goods vehicles (average 6,600 per day) and 2.5 million cars and coaches passed through the Port of Dover[7]. Movements through Dover are expected to increase with plans for improvements to the Eastern Docks and the Western Docks Revival which will enhance the capacity of the Port. The Port of Dover[8] has a planning assumption for the freight market (Dover Strait ports) based on a long-run Compound Annual Growth Rate (CAGR) of between 2% and 4% (over the period 2000 – 2014 CAGR was 2.5%), although the market is currently growing much faster and in the short term this trend is expected to continue. Therefore within the next decade there could be between 7,900 and 9,200 HGVs on average per day at the Port of Dover. At peak times there will be a significant number of days when the port handles in excess of 11,000 HGVs per day.

17. Significant growth in freight movements is also expected though the Channel Tunnel. Eurotunnel already handles significant HGV movements as over 1.4 million trucks (average 3,957 per day) used the Channel Tunnel shuttle service in 2014[9], besides over 2.6 million cars and coaches. Future growth in freight movements of 30% is predicted for Eurotunnel for the next 5 years between 2015 and 2020 and between 20-25% growth between 2020 and 2025, equivalent to 6,400 HGVs per day by 2025.

18. Overall, cross-channel traffic using the A2/M2 and A20/M20 corridors currently amounts to more than 10.4 million vehicles per year. On the basis of the projections above, the freight element alone is forecast to grow up to 50% from around 3.8 million trucks now to perhaps 5.7 million by 2024[10].

19. The Government has acknowledged the importance of keeping the M20 corridor open in the £250m investment announced for a lorry park to replace Operation Stack. This is welcome and essential, but it is still only a partial answer to a core problem of capacity and resilience on the main transport corridor connecting UK regions to Europe.

<u>Existing and future Thames crossings</u>

20. The most vulnerable link in the Thames Gateway roads network is the existing M25/A282 Dartford-Thurrock crossing. With use heavily exceeding capacity, and ongoing northbound congestion at peak periods despite the introduction of free-flow tolling in autumn 2014, this is "one of the least reliable links in national strategic roads network"[11]. This much is acknowledged in the long-running process of consultation and development of options for a **Lower Thames Crossing**.

21. More resilient connections between the channel ports and the East of England, Midlands and North are vital to the success of the national economy, and particularly for logistics, businesses importing and

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[5] Department for Transport (2015) Statistical Release: Road goods vehicles travelling to mainland Europe: October to December 2014 (quarter 4)
https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/404778/roro-2014-04.pdf
[6] Department for Transport (2015) Road Traffic Forecasts 2015
https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/411471/road-traffic-forecasts-2015.pdf
[7] DfT Statistics, Table PORT0409
[8] Godden, T. Port of Dover – email correspondence with Kent County Council 12/05/2015
[9] Eurotunnel website accessed 29/04/2015 http://www.eurotunnelgroup.com/uk/eurotunnel-group/operations/traffic-figures/
[10] Further detail is contained in the Report of the European Gateway Strategic Delivery Group, July 2015, Kent CC.
[11] Government Response to Consultation Options for a New Lower Thames Crossing, CM 8895, p.10.

exporting, and supply chains. The unreliability of the existing crossing adds cost to businesses and consumers not just in the South East but in all parts of the economy that rely in goods and services traversing routes from the Channel ports to destinations north and east of London.

Issues for the National Infrastructure Commission

22. We await with interest the Department for Transport/Highways England consultation on the preferred route for the proposed Lower Thames Crossing. However, without pre-empting the proposals to be put forward and the Partnership's consultation response, there is clear consensus amongst partners that the entire Channel ports to M25 corridor needs to be considered holistically. A network is only as strong as its weakest link. Whatever the location of the Lower Thames Crossing and its connections north and south of the crossing itself, the A2/M2 and A20/M20 corridors, and the links between them, need to be able to perform to a consistently higher standard than at present.

23. We would therefore urge the Commission to give early priority to:

   a. Examining the resilience of highways networks connecting the preferred route of the Lower Thames Crossing to the Channel Ports and the options for upgrading those connections on a timetable consistent with that proposed for the Lower Thames Crossing;

   b. Examining the options for accelerating delivery of both the Lower Thames Crossing and associated network improvements.

London's transport infrastructure

24. In this section we focus on two questions posed by the Commission regarding the future of London's transport infrastructure:

    1. What are the major economic and social challenges facing London and its commuter hinterland over the next two to three decades?

    2. What are the strategic options for future investment in large-scale transport infrastructure improvements in London - on road, rail and underground - including, but not limited to Crossrail 2?

25. London aspires to be self-sufficient in meeting the housing needs of its growing population within the GLA boundary. But rising prices are pushing London's workforce ever further outwards in search of housing affordability. Its 'commuter hinterland' is thus progressively being redefined both as London-based workers travel from further away, and as selective infrastructure investments – such as HS1 – 'move' certain destinations closer to central London in terms of journey time.

26. A major emphasis of London Mayoral policy over a number of years has been to focus London's growth eastwards. This overlaps with the vision for the Thames Gateway as offering the greatest potential to support London's growth.

27. That potential brings both threats and opportunities. Delivering the Thames Gateway vision means growing local employment opportunities across the Gateway, as well as responding to the opportunities and demands of London's employment markets. The stretching of London's commuter hinterland puts further pressure on both housing markets and transport and other infrastructure in North Kent. Analysis carried out in June 2011[12] showed that an estimated 55,000 (19.4%) of the nearly 282,000 North Kent workforce were travelling to Greater London for work. For some boroughs bordering the Capital, such as Dartford, the proportion was over 36%. More than half of travel to work in Greater London from Kent and Medway was attributable to the four local authority areas in Thames Gateway Kent. These journeys would predominantly be made via the North Kent Southeastern rail lines, HS1 and along the A2/M2 corridor.

[12] http://www.kent.gov.uk/__data/assets/pdf_file/0010/8200/Updating-the-2001-Journey-to-Work-Matrix.pdf

28. Commuter pressure is already evident on these transport networks. The previous section has referenced the highways congestion especially on the A2/M2. Peak rail services including HS1 already run at or exceeding capacity from many North Kent stations; and genuine high speed performance is only delivered on HS1 between Ebbsfleet and London. With projected growth of 58,600 homes, 115,400 people and 59,100 jobs in North Kent from 2011-2031[13], pressures on capacity and performance will be magnified. Proposals are also emerging for significantly enhanced levels of growth in the adjoining London Borough of Bexley, and at the Isle of Dogs in London's Docklands. The continued commercial expansion at Docklands depends upon access to a wide labour pool, for which enhanced rail and other public transport connectivity, such as eastwards extension of Crossrail 1, will be crucial.

29. Those growth projections do not take account of the possible creation of the London Paramount Entertainment Resort (LPER) at Swanscombe Peninsula. If approved, LPER is expected to create 8,500 jobs on site (6,700 in the resort and 1,800 in hotels) plus at least 15,700 further direct and indirect jobs in the supply chain[14], largely within the same travel-to-work corridor but also extending to other parts of Kent, Essex and south and east London. LPER are also modelling on the basis of an average 40,000 visitors per day from opening in 2021. During consultation on their emerging proposals, London Resort Company Holdings indicated an expected modal split of 58% of visitors arriving by private car and 24% by rail. Putting the highways impacts to one side, on the basis of these forecasts rail passengers (visitors and workforce) would add over 9 million journeys (entries and exits) onto the North Kent rail network per annum.

30. It is with these pressures in mind that TGKP has been urging Government:

    c. To facilitate a strategic and joined-up approach to the related issues affecting future rail capacity in North Kent, including the re-franchising of Southeastern rail services and Network Rail's Kent Route Study; and

    d. Specifically to consider the the business case for extension of Crossrail from Abbey Wood to Gravesend via Ebbsfleet.

31. TGKP is a partner in a project being led by Transport for London, together with the Greater London Authority, Kent CC, Ebbsfleet Development Corporation and London Borough of Bexley, undertaking a study to understand the economic case for such an extension of Crossrail that takes account of this anticipated growth. TGKP are joint signatories with other project partners of a separate submission to the Commission giving more detail and supporting evidence on this aspect.

32. **We would welcome the opportunity to share the outcomes from this study with the Commission. We also suggest it would be helpful for the Commission to examine over the coming months the interplay between the different work programmes (Crossrail extension, re-franchising, Kent Route Study) in order to help realise optimal outcomes from, and prioritisation of, the investment associated with each.**

Thames Gateway Kent Partnership

8 January 2016

[13] Kent & Medway Growth and Infrastructure Framework, AECOM, September 2015: Development Suitability Analysis for Dartford, Gravesham, Medway and Swale. http://www.kent.gov.uk/__data/assets/pdf_file/0012/50124/Growth-and-Infrastructure-Framework-GIF.pdf

[14] See http://www.londonparamount.info/jobs-and-skills/. The job numbers quoted are full time: it can be expected that with job-sharing and part time working the number of people employed and therefore travelling to and from the Resort could be significantly higher.