



Crossrail

Development Pipeline Study

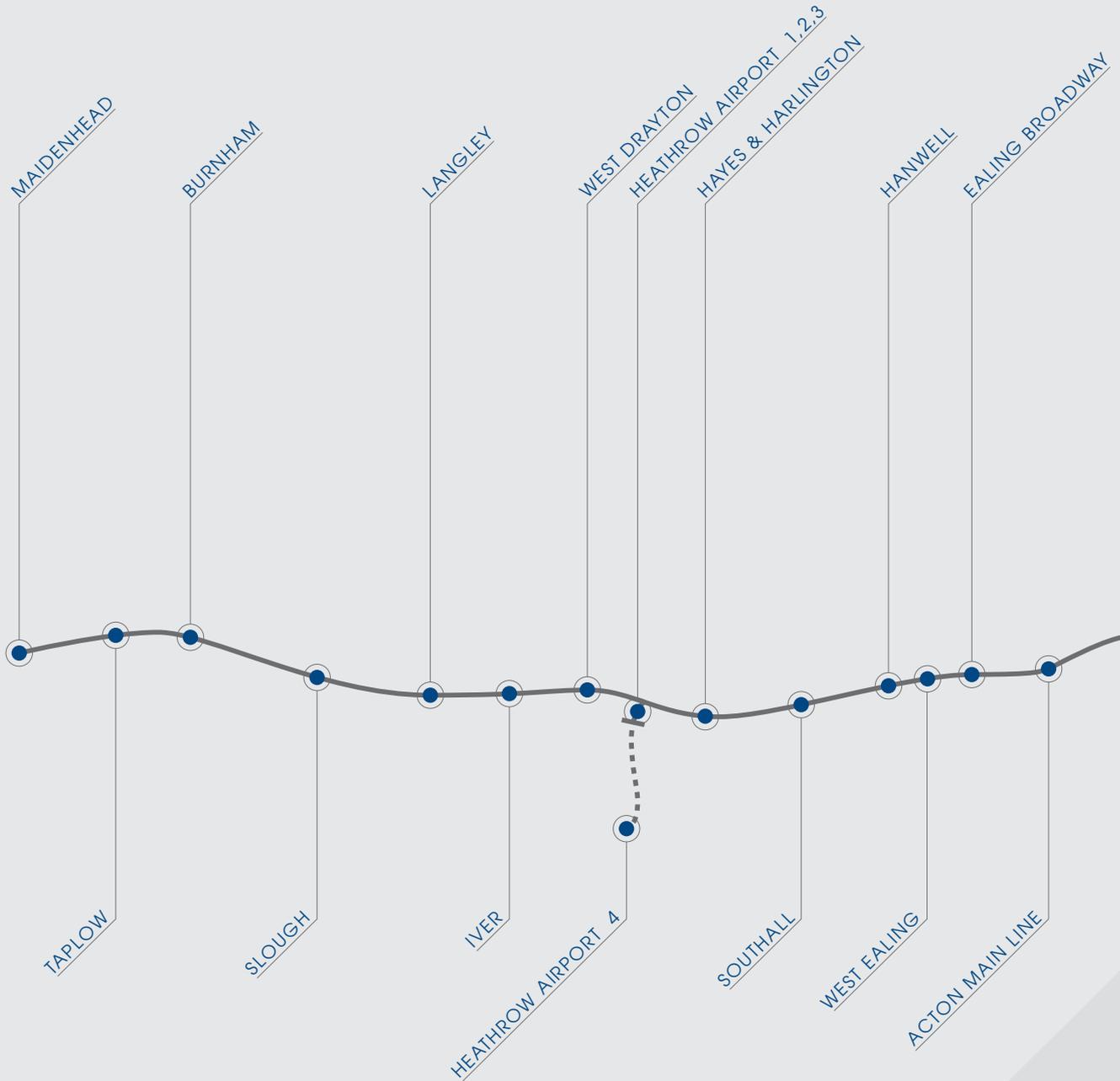
Report

March 2014

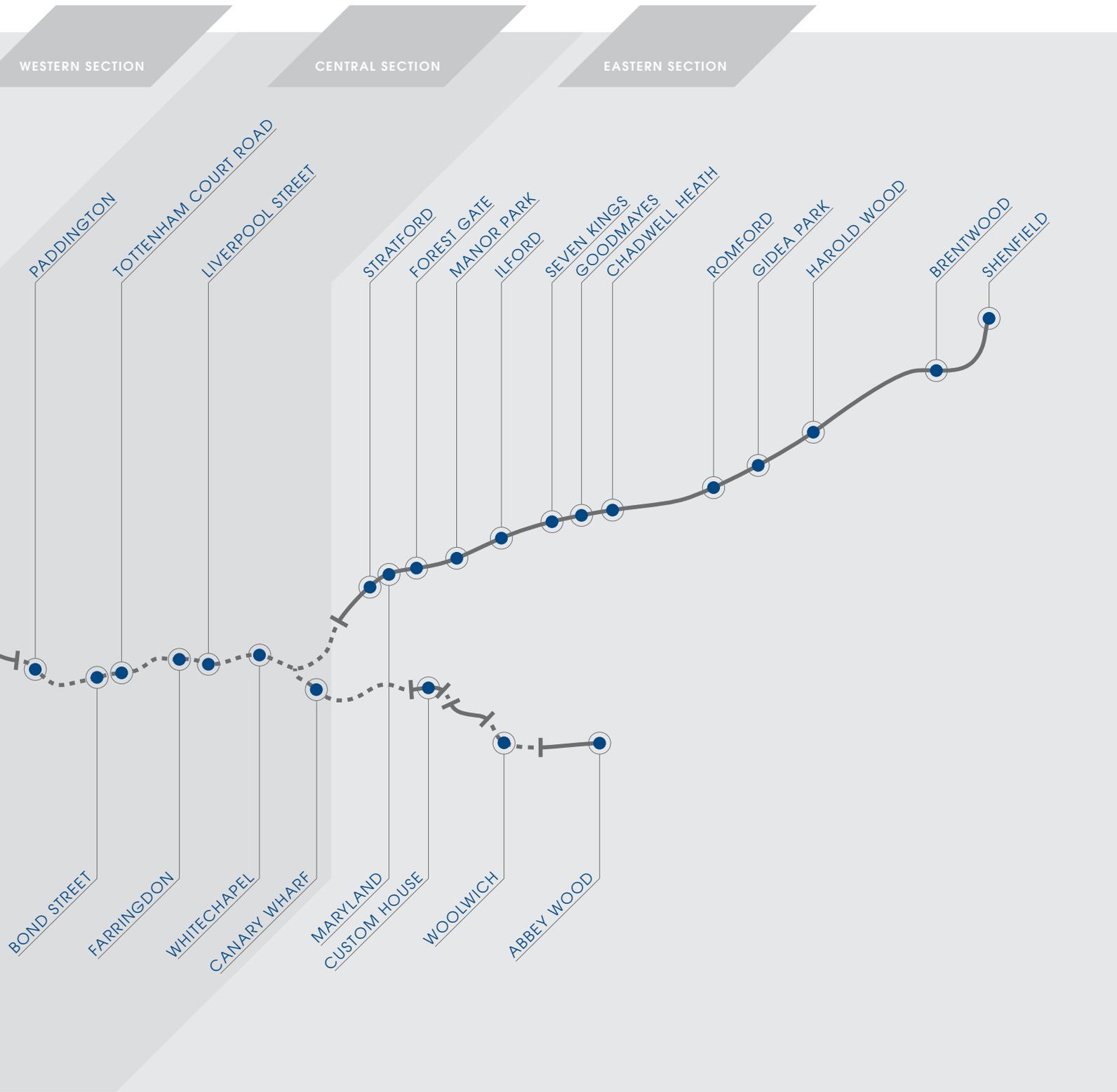




Crossrail Regional Map



cover image: Farringdon



WESTERN SECTION

CENTRAL SECTION

EASTERN SECTION

PADDINGTON

TOTTENHAM COURT ROAD

LIVERPOOL STREET

STRAFORD

FOREST GATE

MANOR PARK

ILFORD

SEVEN KINGS

GOODMAYES

CHADWELL HEATH

ROMFORD

GIDEA PARK

HAROLD WOOD

BRENTWOOD

SHENFIELD

BOND STREET

FARRINGDON

WHITECHAPEL

CANARY WHARF

MARYLAND

CUSTOM HOUSE

WOOLWICH

ABBAY WOOD



Farringdon West

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Executive Summary

GVA have been commissioned by Crossrail Ltd to investigate the scale and quantum of investment in property in areas close to Crossrail stations. It is intended to provide a comprehensive review of major planning activity in recent years and establish a baseline which can be monitored over time. The study provides a base consistent with the Property Impact report, published in October 2012.

The Study has sought to identify both the nature and scale of development that is occurring close to Crossrail stations, highlighting trends over time and trends in relation to distance from the station.

As the opening of Crossrail draws closer the established baseline will enable Crossrail to understand the role the line plays in supporting and enhancing growth and regeneration across London and the South East.

Key Findings

Crossrail is having a very positive impact in supporting the growth and development of London and its hinterland. Whilst it is not the sole driver of development, there is significant recognition of its importance by developers and their advisers to conclude that Crossrail is already a major component of the growth context.

Strikingly, whilst there are a number of influences on development activity along the Crossrail route, 41% (or circa 5,000,000sq m of floorspace) of the total 324 applications analysed between 2008 and 2013 specifically identify Crossrail as a key factor within the supporting case for the development proposal either through directly improved transport capacity or the wider place-making and regenerative impact. The recognition of the important role Crossrail is playing has increased over time. In 2009 the 15 % of applications cited Crossrail as a key factor; this had risen to 48% in the first six months of 2013.

The importance of Crossrail also increases in relation to proximity to the Crossrail stations: within the 500m zone around the stations 53% of applications relied in some part on Crossrail to justify their proposals. The study also shows that these percentages are increasing over time.

Development activity is greatest in London's core economic heart, reinforcing market trends by encouraging commercial development to come forward. Indications are that Crossrail is an important factor in creating confidence in the West End, the City and Canary Wharf as part of the economic recovery. Major schemes recognise the role played by Crossrail in unlocking development potential through increased transport capacity.

However the influence of Crossrail is not limited to supporting existing market strengths and is even more important in locations where there are major regeneration opportunities. Crossrail is already supporting development through the expectation of new access and connections and is also creating a new sense of place through its own development and public realm improvements.



Tottenham Court Road

Crossrail is having a direct impact by bringing forward the regeneration of areas such as Abbey Wood, Woolwich, Southall and Maidenhead. Crossrail is also a key element supporting the next phase of development and regeneration of Stratford and the Royal Docks.

The explicit recognition of Crossrail's role in supporting development and regeneration is growing and, as the 2018 opening date draws closer, the development focus is shifting. Recent planning applications are advocating the role Crossrail plays in building the case for development through improved accessibility, higher development densities and more sustainable development.

The estimated scale of permitted development is summarised in Figure 3 of this report. If this information is combined with the 'Places to Watch' graphic (Figure ES1) which was included in the 2012 GVA Property Impact Study an indication can be gained of, between 2009 – 2013, how the Crossrail station locations are changing relative to the long term prediction (up to 2021) included in the Property Impact Study, Figure ES2.

In summary the comparison of the floorspace coming forward in planning application is broadly reflecting the predicted trends with some notable exceptions.

The very high floorspace figures at Stratford and Liverpool St show these two locations as currently changing at a faster pace than predicted. On the other hand the step change predicted due to Crossrail at Slough, Ealing Broadway, Whitechapel and Abbey Wood is yet to be seen in terms of volume of floorspace included within planning applications.

It should be borne in mind that this comparison is being made at a very early stage. More authoritative assessments of how the predicted trends at locations are being realised can be made in the ensuing years up to line opening in 2018 and beyond.

Figure ES1: Identified 'Places to Watch'

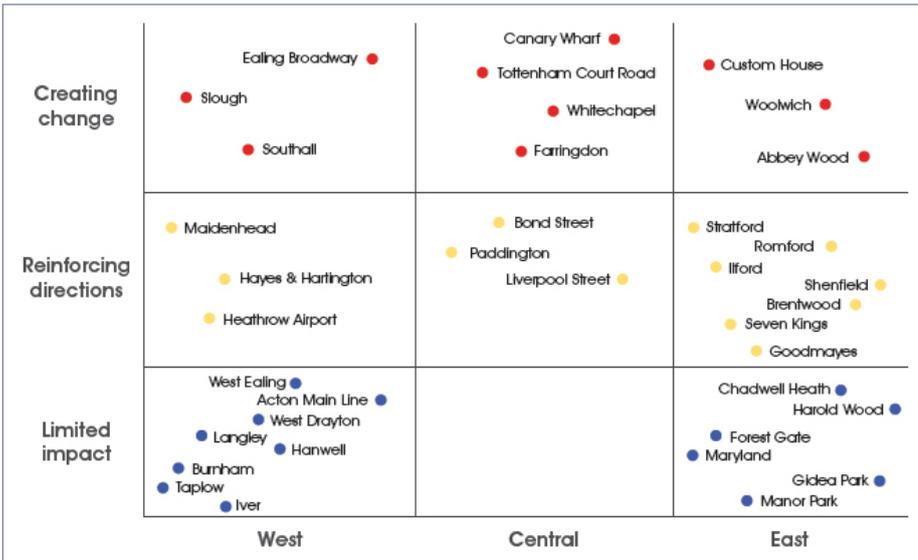
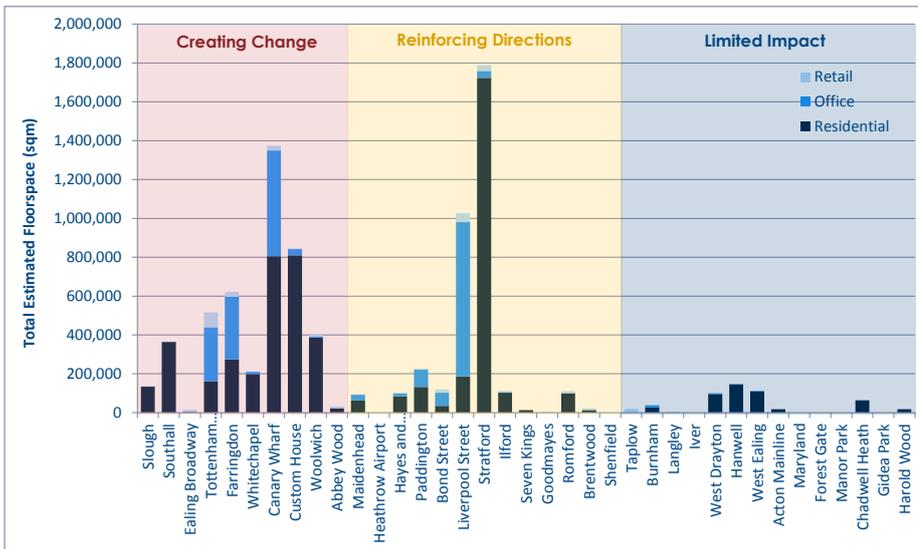


Figure ES2: Achievement to Date



Summary Report

1: Introduction and Project Brief

GVA have been commissioned by Crossrail Ltd to investigate the scale and quantum of investment in property in areas closely allied to Crossrail station locations. It is intended to provide a comprehensive review of major planning activity in recent years and establish a baseline from which this can be monitored over time. The study provides a base consistent with the Property Impact report, published in October 2012, enabling impact to be monitored and benchmarked over time.

The Study has sought to identify both the nature and scale of development that is occurring close to Crossrail stations, highlighting trends over time and trends in relation to distance from the station.

Over time the established baseline will enable Crossrail to understand the role the line plays in supporting and enhancing growth and regeneration across London and the South East.

It is important to note that the Study is not suggesting that development along the line of route is solely due to the influence of Crossrail. However, it does seek to understand the relationship between stations and development, to identify trends and, specifically, to identify where planning applications have particularly highlighted that Crossrail will support proposals.

Method and Approach

To meet the study aims we have developed a bespoke methodology, collecting a comprehensive database of development information that draws on and triangulates a range of sources to ensure that the data and information captured is both comprehensive and accurate. To establish the database we have drawn upon development information held by:

- Estates Gazette
 - EGi
 - London Residential Research
- CoStar Focus
- Mollor
- London Development Database
- Local Authority planning data

The focus has been to identify 'major' schemes that have achieved some level of confirmation in the form of a planning consent. A threshold has been established that filters out schemes that would deliver less than 20 housing units or 1,000sqm of commercial floorspace.

The data recorded has identified the quantum of development across major land uses (office, retail and residential space), it also tracks the date that permission was granted and, where available, the current status of the development.

Information has been captured within two Zones of Influence around each Crossrail Station, from 0-500m and 500-1,000m, in line with the approach identified in the 2012 Property Impact Study. Where stations have more than one entrance the Zones of Influence have been measured from the 'mid-point' between the entrances. For stations with a single entrance the Zone has been measured from the entrance point. This enables comparison of both the level of activity between Zones and the relative share of development by use type.

2: Supporting Development along the Line

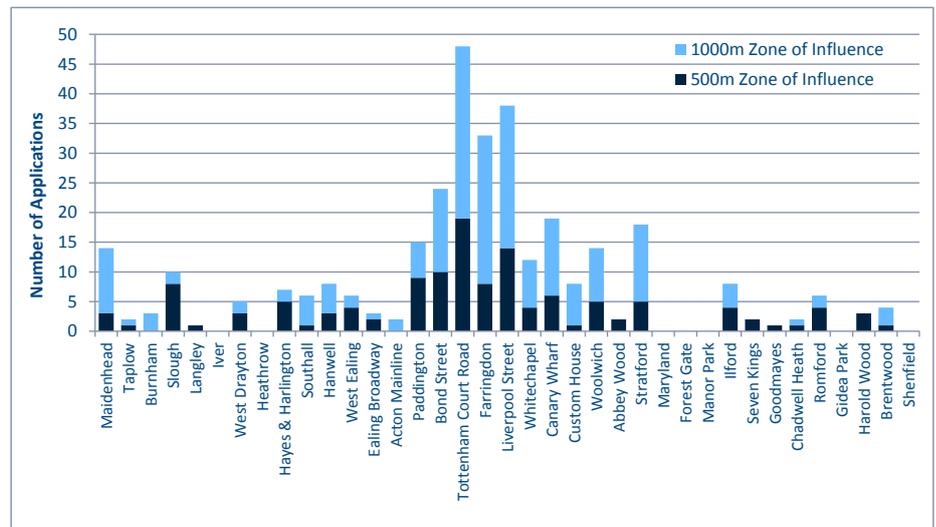
Planning application data has been assigned to the relevant station based on their postal zone. A list of detailed postcodes covering each zone has been established, with planning applications referenced against these. Where postcodes overlap Zones of Influence for different stations an adjustment has been made that assigns sites to the closest station entrance. This is principally an issue in the Central Section where the Bond Street and Tottenham Court Road and (separately) the Farringdon and Liverpool Street 1,000m zones overlap.

Data has been recorded from 2009 to reflect the first full year following Royal Assent of the Crossrail Bill – identified as a key milestone in the 2012 Property Impact Study. At this stage information has been captured up to the first half of 2013 to provide indicative results in light of the strengthening economic recovery.

Importantly the analysis seeks to identify links between the development proposals and Crossrail in order to directly demonstrate Crossrail’s role in supporting development. By reviewing the supporting evidence which has been provided with each application we have recorded where Crossrail is highlighted and the nature of each reference.

Our analysis of planning activity linked to major schemes has identified a total of 324 applications within the zones of influence along the whole line during the study period. The level of activity is not equal at each station, reflecting comparative market strengths, identified capacity and other drivers of demand.

Figure 1: Number of Planning Applications by Station 2008-2013



Strikingly, whilst there a number of influences on development activity along the Crossrail route 41% of the total 324 applications analysed between 2008 and the middle of 2013 specifically identify Crossrail as a key factor within the supporting case for the development proposal.

Supporting London’s Core Markets

Analysis of activity along the Crossrail route highlights the role Crossrail is playing in supporting the core areas of activity within London. Activity is greatest in areas around Tottenham Court Road and Liverpool Street where Crossrail forms part of a wider mix of drivers of development activity in the West End and the City.

Crossrail is directly helping to create demand in what were previous 'fringe' locations, in particular supporting their integration into the core City offer with major activity in locations such as Farringdon and Whitechapel. In these locations Crossrail is supporting the 'next generation' of economic hubs and residential communities that will underpin London's growth.

Revitalisation and Regeneration

Outside of the Central London core, activity has been focussed in larger centres, again supporting and enhancing prevailing market trends and giving impetus to major revitalisation plans. Town centres such as Maidenhead, Slough, Ilford and Romford have benefitted from significant levels of planning activity, which is already translating into development starts.

KEY APPLICATIONS

OLDCHURCH HOSPITAL, ROMFORD
DEVELOPER: TAYLOR WIMPEY & SWAN HOUSING



Status – Under Construction
Size – 859 units

Improved Public Transport Accessibility Level (PTAL) scores resulting from future Crossrail services are identified as a key support for delivering a high density scheme that can deliver a sustainable multi-mode transport plan. A particular focus is placed on improved access to the West End.

Crossrail's influence extends beyond supporting existing market trends and is beginning to influence the pace of development within areas of major regeneration focus. This includes a number of the key existing locations but, most pertinently, is helping to unlock major brownfield opportunities.

In the east the accessibility benefits, together with the wider investment being attracted at both Custom House (as identified in our more detailed Case Study analysis) and Stratford are helping to bring forward the long term aspirations for the Royal Docks and Stratford City respectively.

In the west Crossrail is the key component for unlocking the potential of Southall and Hayes, providing a vital uplift in connectivity to support development at Southall Gasworks and the Old Vinyl Factory.

KEY APPLICATIONS

THE OLD VINYL FACTORY, HAYES & HARLINGTON
DEVELOPER: PERPLEXED LLP



Status – Under Construction
Size – 510 units, 7,886sqm B1a, 4,000sqm A1

The planning application for the Old Vinyl Factory views Crossrail as a key driver for the regeneration of Hayes, improving the connections between the town centre and the application site, enabling wider development interest and investment in the town centre.

From a transport and accessibility perspective Crossrail's role is recognised by supporting higher density development and by improving access to and from Central London.

In south east London Crossrail is helping to create new market opportunities by connecting this part of London directly to the core economic hubs for the first time. At Woolwich the delivery of both town centre enhancements and the Royal Arsenal redevelopment are intrinsically linked to new Crossrail services. In Abbey Wood the early stages of Development Securities' major proposals are timed to coincide with Crossrail's opening.



Paddington

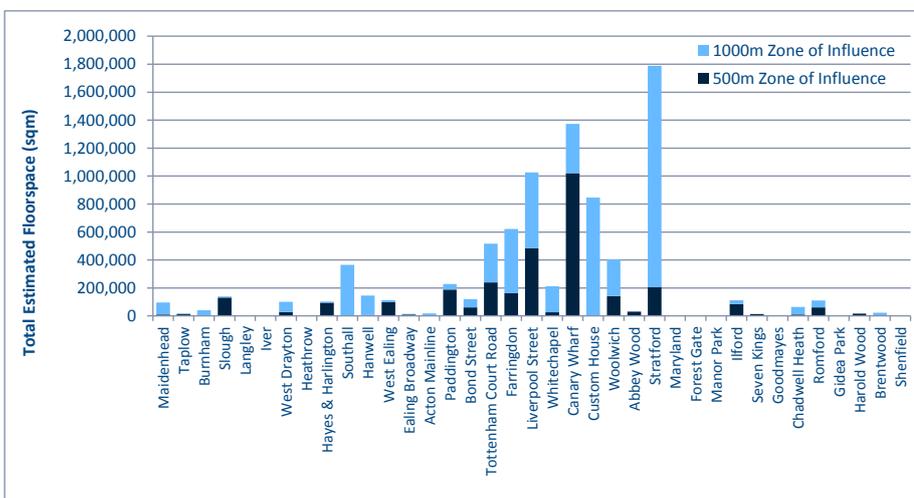
Changing Scale and Roles

Identifying the number of planning applications provides a good guide to the level of activity but provides limited indication of the relative scale of development Crossrail is supporting. Planning data is not provided using consistent measures for each land use in each application, with commercial floorspace provided in square metres and residential provision stated in units.

To provide an estimate of total floorspace we have assumed an average of 90sqm for each residential unit, based on the assumption that each development will provide a range of flats or small houses.

Considering the estimated scale of development within the Crossrail Station Zones of Influence (rather than solely the number of applications) it is possible to see a richer pattern of development. Whilst central London tends to dominate in terms of number of applications, the significant scale of opportunity at Canary Wharf, Custom House and Stratford enable these areas to attract much larger applications.

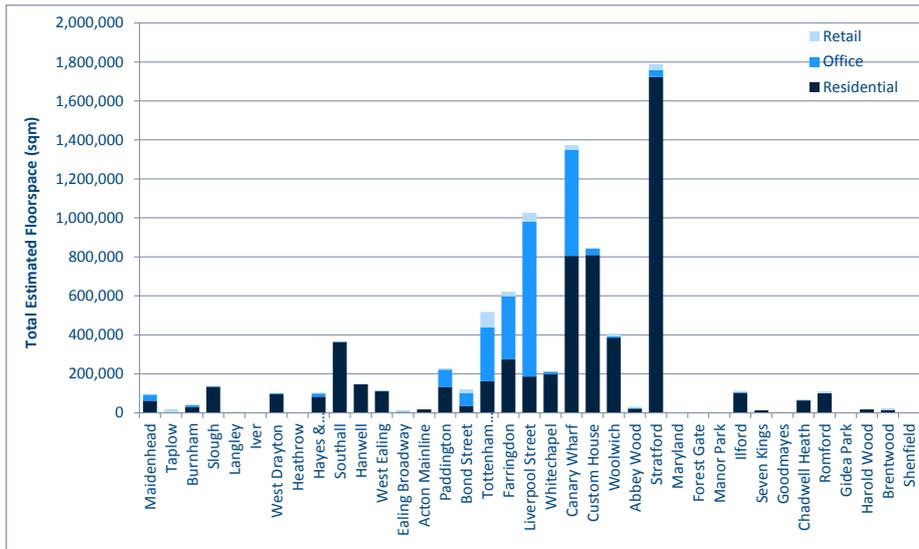
Figure 2: Estimated Scale of Permitted Development (assuming 90sqm per residential unit) by Zone of Influence



Both Custom House and Stratford have considerable capacity in the 500m to 1,000m Zone, reflecting the wider regeneration zones within which the stations lie. Canary Wharf, through the capacity provided at Wood Wharf, has the majority of space within 500m of the station. Floorspace at both Tottenham Court Road and Liverpool Street are relatively evenly split between the two zones.

Breaking total floorspace into respective use classes also highlights the different roles station locations play.

Figure 3: Estimated Scale of Permitted Development (assuming 90sqm per residential unit) by Use Type



Enhancing the London Economy

The majority of office floorspace identified as part of this study has been consented in the core locations of existing activity, most notably Canary Wharf and Liverpool Street.

Floorspace at Canary Wharf is largely contained within the Wood Wharf permission (which on its own represents c.450,000sqm of office development), and this is only achievable following the introduction of Crossrail. However, it will be necessary to monitor this key location as Canary Wharf Group plc are currently reviewing development options within a new masterplanning exercise. This may reduce the commercial floorspace in favour of a more mixed use approach.

Liverpool Street contains a larger number of applications for office floorspace across the two Zones of Influence, ranging from 1,078sqm at Clifton Street to 105,369sqm at 5 Broadgate.

Crossrail’s own over site development plans are also driving significant capacity within the City Fringe, particularly at Farringdon where Crossrail will deliver almost 30,000sqm of floorspace through current permissions and applications.

Creating New Places to Live

The delivery of new residential floorspace represents the largest quantum of space in most station locations along the route. In most locations development trends reflect the existing character of locations, with delivery of new homes in established residential communities such as Slough, Southall, Hanwell and Woolwich.

However, in a handful of places development is creating significant new places, introducing considerable residential capacity in locations where residential use has been historically at low levels

Both Custom House and Stratford benefit from significant public sector support to create new mixed use environments, of which new residential development is a key component. Much of the capacity in Stratford in particular relates to the Athlete’s Village within the Olympic Park, where a Master Consent grants permission for over 6,000 new homes.

KEY APPLICATIONS

SILVERTOWN QUAYS, CUSTOM HOUSE DEVELOPER: CHELSFIELD & FIRST BASE



Status – Pre-application
Size – Space for 9,000 new jobs

Improved connections provided by Crossrail to Canary Wharf, the City and West End are noted within the planning statement as providing a boost to the area's attractiveness to businesses and adding to the 3.5m visitors that are already attracted via the DLR to ExCeL.

Within Canary Wharf the permissions highlight the relatively recent trend for the diversification of the business district as it reaches maturity. A number of applications seek to redevelop the initial phases of office development with more mixed use schemes, creating a new prime residential location on the back of economic success and improved connectivity.

Highlighting Changes in the Retail Sector

The influence of Crossrail on the retail sector is likely to be more limited, with wider structural issues in the sector asserting a much stronger influence over future development proposals. Unsurprisingly permissions are focussed within the larger existing centres such as Bond Street, Tottenham Court Road and Stratford.

The applications data also highlights the wider trend to diversification of traditional economic hubs with a considerable amount of space identified at Farringdon, Liverpool Street and Canary Wharf.

Tottenham Court Road has the highest level of proposed new retail floorspace with applications totalling 77,500sqm. At this location Crossrail is viewed as a catalyst for the regeneration of the area and the wholesale upgrade of the retail offer at the eastern end of Oxford Street.

KEY APPLICATIONS

RATHBONE PLACE, TOTTENHAM COURT ROAD DEVELOPER: GREAT PORTLAND ESTATES



Status – Not Started
Size – 162 Units 33,000sqm B1a

The application recognises that by alleviating existing pressure on the existing transport network Crossrail is creating opportunities for greater levels of development. Crossrail is a catalyst for private sector investment to improve the built fabric of the area and, in turn, improve its commercial performance.

3: Influences of Time and Distance

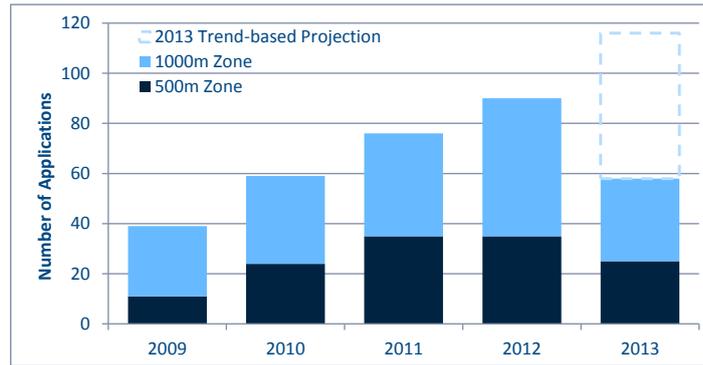
Along the Crossrail route development activity is clearly influenced by the strength of existing markets and concentrations of activity, but in each location Crossrail is supporting commercial and public sector investment to realise its full potential.

The data shows that development activity also varies considerably over time and in relation to the distance from a Crossrail station, suggesting that Crossrail's influence may not solely be linked to localised market trends.

Supporting the recovery

As shown in Figure 4 the level of planning and development activity has increased steadily year on year, with double the level of applications in 2012 than 2009. Half year data for 2013 suggests that this upward trend is likely to continue.

Figure 4: Number of Planning Application by Year 2008-2013



Clearly, these improvements reflect the generally improving development market, with greater confidence shown by developers and increasingly accessible funding for major development, particularly in areas where the market has remained relatively strong.

In this sense macro-economic factors are likely to provide the core driver of increased activity. However, our detailed analysis of planning applications and their supporting evidence base suggests that, by providing critical new transport capacity and connections, Crossrail is increasingly seen as vital for supporting the future success of the areas it serves.

In 2009 only 15% of applications recognised the influence of Crossrail in directly supporting the development proposal. The figure is 31% for applications 2009 to 2011. This is unsurprising given the applications would have been submitted before Crossrail tunnelling started in 2012. Wider references were made within a larger number of applications but these mainly focussed on Mayoral Community Infrastructure Levy requirements.

However, by the first six months of 2013 recognition of the role of Crossrail in facilitating development has increased dramatically, with 48% of applications now using Crossrail as part of the supporting justification for development. The figure is 45% for applications from 2011 to mid 2013.

In the main Crossrail is now identified as providing much needed additional transport capacity, addressing existing and projected transport congestion which enables new development to happen. Interestingly, a small number of applications have explored Crossrail and non-Crossrail development scenarios, demonstrating that Crossrail is acting as a strategic enabler for achieving greater development density.

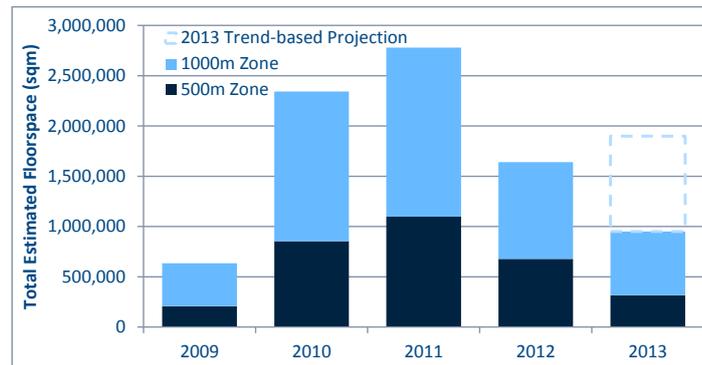
Moreover, in some areas (most notably Woolwich), the wider regeneration benefits are explored within planning statements, both in terms of the public realm improvements associated with the stations and the transformative role of the over-site developments.

More activity, but smaller scale

Total floorspace contained within planning applications grew year on year between 2009 and 2011, peaking at an estimated 2.75m square metres. This peak was driven by a relatively small number of very large applications within 2011, including an Olympic Park Legacy Master Consent at Stratford, Broadgate Place at Liverpool Street and Wood Wharf at Canary Wharf which represent over a third of all floorspace identified.

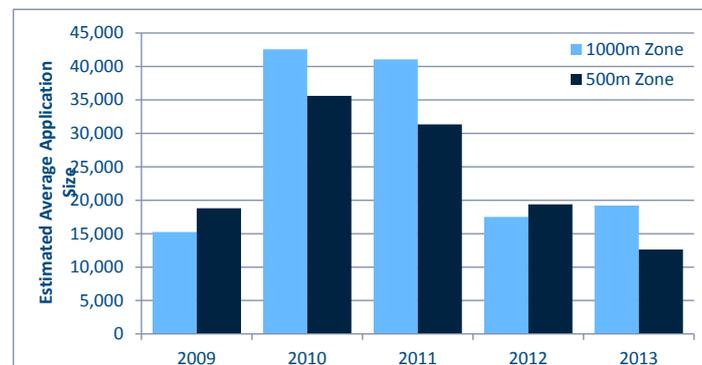
Figure 5 shows the total floorspace consented, broken down into the inner (less than 500m) and outer (500m-1000m) zones of influence.

Figure 5: Estimated Scale per Year (Assuming 90sqm per residential unit)



A result of the divergent trends in floorspace and number of applications is that, on average, application sizes have fallen in 2012 and, for the 6 months to date, also appear to be smaller in 2013.

Figure 6: Estimated Average Application Size (Assuming 90sqm per residential unit)



There is only a relatively small difference in average application size between the 0-500m and 500-1,000m. Even in 2011 if the Olympic Park application is removed from the analysis (given it is driven by a number of 'unusual' factors), average application sizes would be almost equal between the two zones.

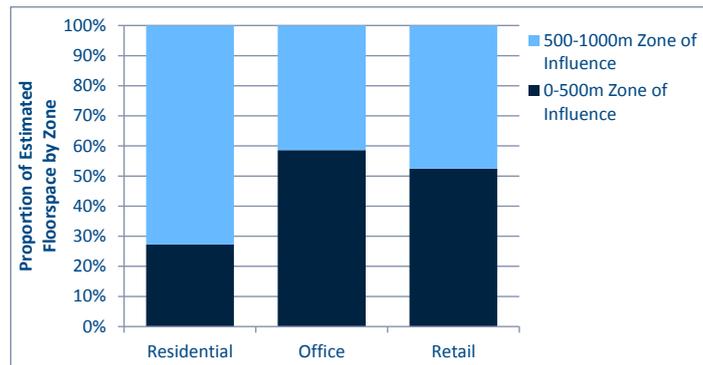
Zones of Influence

The 2012 Property Impact Study identified a different range of impacts between the 'inner' (0-500m) and 'outer' (500-1000m) Zones of Influence, suggesting the effects on office development would be more keenly felt in the 'inner' zone.

As shown in Figure 7 activity to date reflects this forecast with spatial trends differing by use type. 60% of office floorspace consented is identified within 500m of a Crossrail station, reflecting the concentration of economic activity around major transport nodes as businesses seek to maximise their attractiveness to employees.

Retail development is likely to be less strongly influenced by such close proximity to Crossrail, which is reflected in the almost equal share of activity in each zone.

Figure 7: Estimated Floorspace Share by Type and Zone of Influence



The influence of Crossrail is much stronger in relation to residential activity and is predicted to stretch over the full 1,000m Zone of Influence. It is not surprising therefore that a larger share of residential space will be brought forward in the 500-1,000m zone given it covers a larger geographic area.

Stronger Influence Close to Stations

To understand the influence of the 'outer zone' being three times larger than the 'inner zone' we have estimated the relative density of applications and floorspace in each zone at each station. This provides a guide to the relative concentration of activity between the two zones and allows us to begin to understand whether closer proximity to a Crossrail station can encourage greater levels of development activity.

We have analysed the 'density' of activity in two ways. Firstly we have compared the number of applications in the 0-500m Zone to the total land size of the Zone to provide an estimate of applications per hectare.

We have also compared the total estimated square metres of development to the total land area to get a ratio of development floorspace to land area (i.e. sqm of development to sqm of land). This has then been repeated for the 500-1,000m Zone.

Whilst the ratios vary by station there is a consistent pattern to the results that indicates proximity to a Crossrail station does align with a greater density of activity. Results show that at two thirds of stations there is more development identified within 500m of a Crossrail station.

The increased importance of Crossrail within the 500m Zone is reflected in the proportion of applications that identified Crossrail as a factor in supporting the application. Within the 500m Zone 53% of all applications relied in some part on Crossrail to justify their proposals whilst this figure fell to approximately 32% of applications in the 500-1,000m Zone.

4: Different Roles in Different Areas

KEY APPLICATIONS

LONDON WALL PLACE,
LIVERPOOL STREET
DEVELOPER: HAMMERSON
(CENTURION) LTD



Status – Under construction
Size – 64,145 sqm B1a

The application identifies that by enabling passenger redistribution from existing Underground services to Crossrail, a greater scale of development can be achieved close to the station by reducing the impact of increased numbers of commuters.

The 2012 Property Impact Study identified an expectation that different sections of the Crossrail route would benefit in different ways following the opening of Crossrail. Analysis of existing performance supports this.

The Central Section (from Paddington to Canary Wharf) has a significantly higher level of application activity, with almost 60% of all applications within this section. Applications are more evenly spread between the two outer line sections to the east and west.

In terms of floorspace the Central Section of the line has the highest level with an estimated 4 million square metres of development in the pipeline. However, this represents less than 50% of the total floorspace recorded along the whole route. Contrasting this with the proportion of applications within the Central Section (60% of total applications) indicates that there is a significant number of very large applications in Outer London.

Figure 8: Planning Applications by Line Section

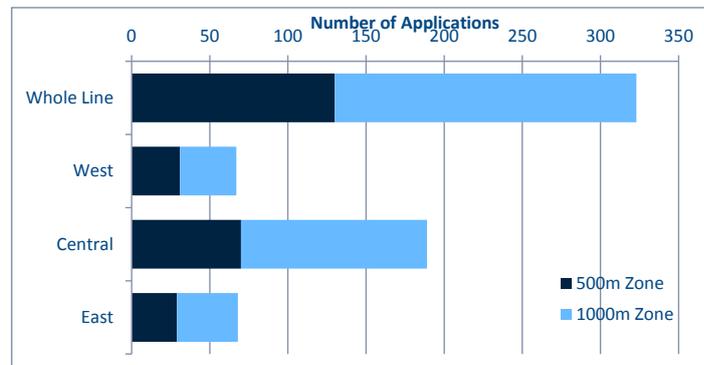
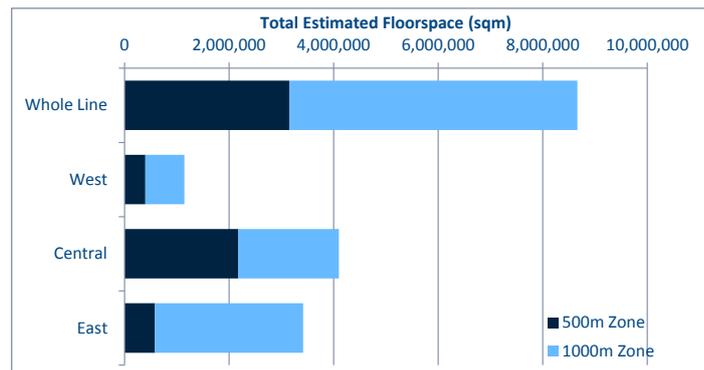


Figure 9: Estimated Floorspace by Line Section (assumes 90sqm per residential unit)



In terms of floorspace it is noticeable that the West Section (Maidenhead to Acton Mainline) has a considerably lower level of activity, in part this reflects the smaller scale development opportunities and the longer term nature of some proposals, which are yet to reach planning application stage.

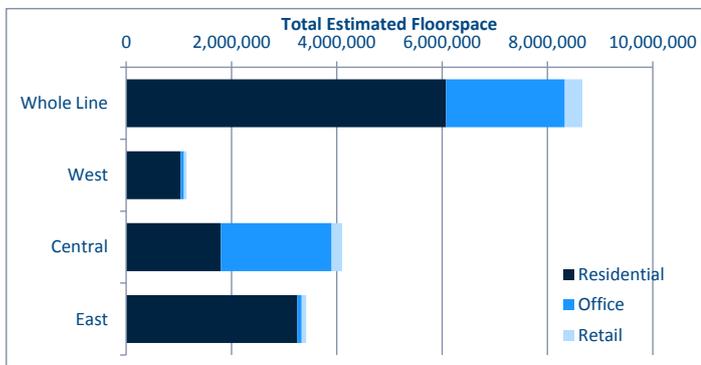
Differing roles and focus

Across the whole line it is evident that residential floorspace forms the majority of space. However, each section of the line demonstrates a markedly different share of development by use type.

Unsurprisingly commercial floorspace dominates the Central Section, driven by large office permissions located near to Liverpool Street (Aldgate), Canary Wharf (Wood Wharf) and Farringdon. The Central Section also contains the most significant share of retail floorspace, led by the expansion of major centres such as the West End (Bond Street and Tottenham Court Road) and Westfield (Stratford). Outside of the centre there is relatively little commercial floorspace activity.

The Eastern Line Section has the largest capacity for residential development, totalling over 35,000 units. This reflects the large, brownfield opportunities presented by major redevelopment of the Royal Docks and Stratford.

Figure 10: Estimated Floorspace by Line Section and Use (assumes 90sqm per residential unit)



KEY APPLICATIONS

THE WATERFRONT, WOOLWICH DEVELOPER: BERKELEY HOMES (EAST THAMES) LTD



Status – Not Started
Size – 2,032 units

Crossrail is viewed as a key element in the regeneration of Woolwich by the majority of recent applications. The Waterfront masterplan in particular recognises the importance of Crossrail in creating an attractive and viable location for high quality residential development.

Direct connections to new areas such as Heathrow and Canary Wharf are expected to dramatically alter commuting patterns, opening Woolwich up to a new residential audience. Further investment alongside early residential schemes will improve the whole offer of the town centre.



Canary Wharf

5: Conclusion

Crossrail can be considered to be having a very positive impact in supporting the growth and development of London and its hinterland. Whilst it is not the sole driver of development, there is significant recognition of its importance by developers and their advisers to conclude that Crossrail is already a major component of the growth context.

Development activity is greatest in London's core economic heart, reinforcing market trends by encouraging commercial development to come forward. Indications are that Crossrail is an important factor in creating confidence in the West End, the City and Canary Wharf as part of the economic recovery. Major schemes recognise the role played by Crossrail in unlocking development potential through increased transport capacity.

However the influence of Crossrail is not limited to supporting existing market strengths and is even more important in locations where there are major regeneration opportunities. Crossrail is already supporting development through the expectation of new access and connections and is also creating a new sense of place through its own development and public realm improvements. Crossrail is having a direct impact by bringing forward the regeneration of areas such as Abbey Wood, Woolwich, Southall and Maidenhead. Crossrail is also a key element supporting the next phase of development and regeneration of Stratford and the Royal Docks.

The explicit recognition of Crossrail's role in supporting development and regeneration is growing and, as the 2018 opening date draws closer, the development focus is shifting. Recent planning applications are advocating the role Crossrail plays in building the case for development through improved accessibility, higher development densities and more sustainable development.

Appendix 1: Case Studies



Hayes & Harlington



Southall



Tottenham Court Road



Liverpool Street



Custom House



Woolwich



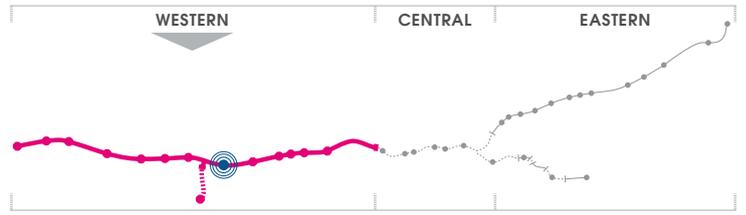
Ilford



Romford

Hayes & Harlington

Case Study



Crossrail Context Map



Western Section



Hayes & Harlington Station

Description of Station and Surrounding Area

Hayes & Harlington station lies on the western section of the Crossrail route, with Heathrow and West Drayton to the west and Harwell to the east.

Hayes is an established District Centre with long-standing employment sites and related commercial floorspace as a result of its proximity to Heathrow Airport. There has already been significant developer interest in Hayes with major new investment at London Gate (Blyth Road) and Hyde Park (Millington Road). In recent years the character of the station area has become increasingly residential as mixed use development proposals have been promoted.

Growth Potential

Hayes & Harlington is identified in GVA's 2012 Property Impact Study as a residential 'Place to Watch', having significant potential for growth. Residential development is anticipated to come forward through re-use of vacant redundant commercial stock.

Application Analysis

A total of seven significant applications were found for the Hayes and Harlington station catchment zones between 2009 and 2013, five of which are within 500m of a station and two within 500-1000m.

Site	Applications	Resi Units	Office Space (sqm)	Retail Space (sqm)
500 m	3	762	8,750	4,251
500-1000 m	4	158	6,966	441
TOTALS	7	920	15,716	4,692

A total of 920 residential units are proposed in Hayes and Harlington; 510 units of which are anticipated to be coming forward in the Old Vinyl Factory development.

The scale of proposed new office provision in Hayes and Harlington is also significant with a total floorspace of 15,736 sqm to be provided across four schemes. All of the office floorspace is located within 500m of the proposed Crossrail station.

The scale of retail provision totals 4,690 sqm from three applications, 4,000 sqm of which is provided by The Old Vinyl Factory scheme.

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 The Old Vinyl Factory - 1 - The Gatefold Building (51588/APP/2011/2253)	132	321	251	Full
2 The Old Vinyl Factory - 1 - Master Consent (59872/APP/2012/1838)	510	7,886	4,000	Full
3 20-30 Blythe Road (1425/APP/2011/3040)	120	543	0	Full
4 Hayes Swimming Pool (1942/APP/2010/31)	72	0	0	Full
5 The Kings Arms PH (10954/APP/2011/1997)	21	0	441	Full
6 Glenister Garden (Glenister Hall and Sports Ground) (40169/APP/2011/243)	65	0	0	Full
7 Hyde Park Hayes HPH4 (40652/APP/2012/2030)	0	6,966	0	Full
TOTALS	920	15,716	4,692	

THE OLD VINYL FACTORY
DEVELOPER: PERPLEXED LLP



Description of Scheme:

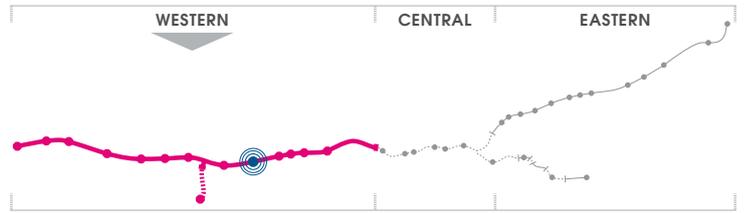
- The Old Vinyl Factory planning application was submitted in 2012 by developer Perplexed LLP for a mixed use development consisting of 510 residential units, 7,886 sqm of office floorspace, 4,000 sqm of retail floorspace and 4,700 sqm for D1/D2 use.
- The development is located on Blyth Road, UB3 1BB, within a 500m radius of the Hayes & Harlington Crossrail station.
- Construction work on the development, which has a residential density of 170 units, has started.

Role of Crossrail:

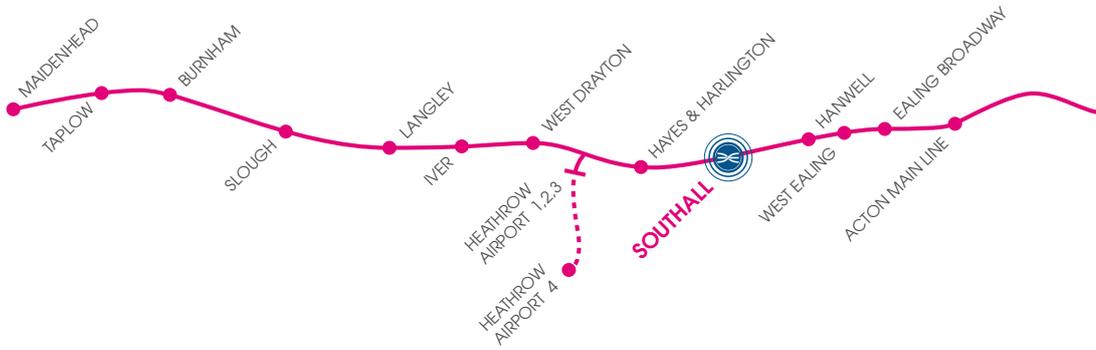
- According to the scheme’s planning documentation, Crossrail offers the opportunity to regenerate the area, and the redevelopment of the site will contribute to this.
- The redevelopment of the station area will open up the town centre and encourage pedestrians to walk beyond the high street (out towards the Vinyl Factory)
- The arrival of Crossrail will accentuate growth within Hayes, particularly in the owner occupier housing sector.
- The Planning Statement also uses proximity to Crossrail and the town centre to justify both the high density and small units proposed in the scheme in order to maximise the opportunity to live in this ‘sustainable’ location.

Southall

Case Study



Crossrail Context Map



Western Section



Southall Station

Description of Station and Surrounding Area

Southall station lies on the western section of the Crossrail route, with Heathrow and West Drayton stations to the west and Hanwell to the east.

Southall is identified as a District Retail Centre serving a predominantly local and specialist retail market. The area surrounding the station has a wide mix of well established residential areas, a Sikh Temple, education, and employment and retail facilities.

Growth Potential

Southall is identified in GVA's 2012 Property Impact Study as a residential 'Place to Watch', having significant potential for growth. It offers land availability, policy direction and a growing population close to Crossrail services. In particular Crossrail will open up development opportunities on existing large-scale brownfield sites such as the Southall Gasworks.

Application Analysis

In Southall, there are six applications of significance within 1km of the station, only one of which is located within 500m of Crossrail.

Site	Applications	Resi Units	Office Space (sqm)	Retail Space (sqm)
500 m	1	0	857	310
500-1000 m	5	4,045	0	420
TOTALS	6	4,045	857	730

A total of 4,045 residential units are proposed in Southall; 3,475 units of which are coming forward in the Southall Gasworks site.

The scale of office provision is much less significant with only 857 sqm of floorspace in the pipeline. The level of retail floorspace to be provided in Southall is also low, with only 730 sqm expected to come forward.

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 Southall Delivery Office (PP/2012/5267)	0	857	310	Full
2 Southall Gas Works Site (P/2008/3981)	3,475	0	0	Outline
3 Havelock Estate -Phase 1 (PP/2013/3242)	287	0	70	Full (Application)
4 The Primary (Featherstone Junior School) (P/2011/0808)	143	0	0	Full
5 2-16 Western Road (PP/2013/0997)	34	0	350	Full
6 Former Salisbury Depot (P/2011/0811)	106	0	0	Full
TOTALS	4,045	857	730	

SOUTHALL GAS WORKS

DEVELOPER: ST JAMES GROUP (MAKE ARCHITECTS)



Description of Scheme:

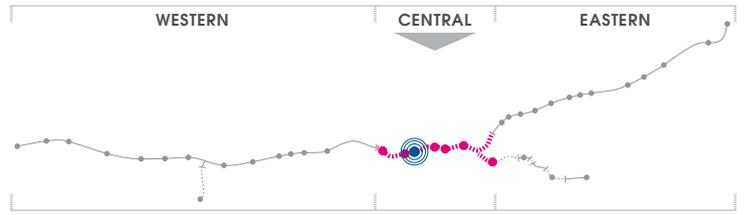
- Southall Gasworks is an 83 hectare undeveloped brownfield site in West Southall in LB Ealing.
- The application was called in by the Mayor and approved in March 2010 after local authorities (LB Ealing and LB Hillingdon) had been minded to refuse.
- Outline permission was granted for a mixed-use development of 3,750 homes, plus 525,000 sqft of commercial and community space, a primary school, landscaped public realm and open amenity space.

Role of Crossrail:

- The supporting planning documentation notes Crossrail will strengthen connections to the east.
- The importance of Crossrail in unlocking the site is increasingly recognised in media reports and planning committee discussions, both in terms of improving access to the site and attracting investment to the area.

Tottenham Court Road

Case Study

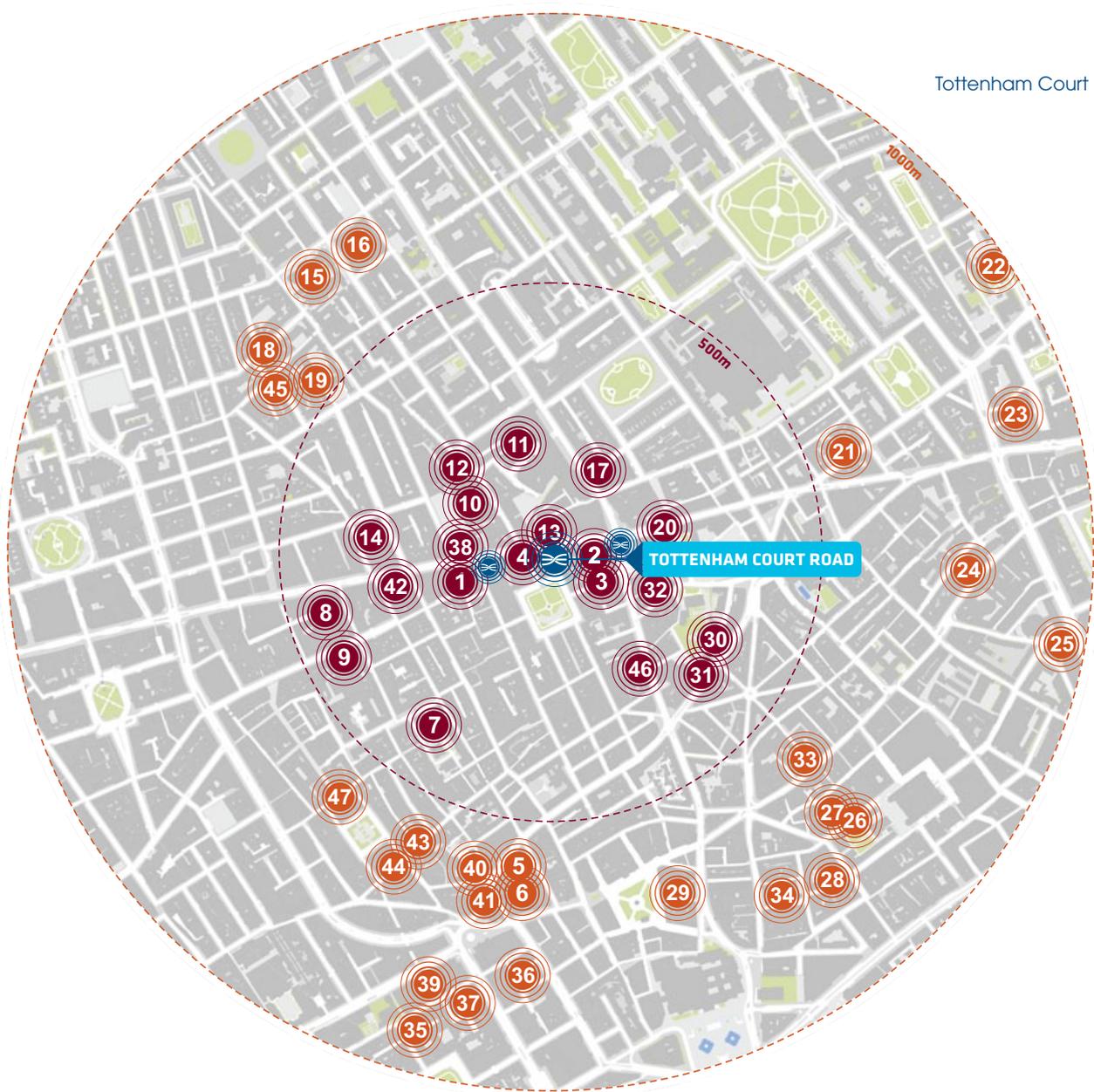


Crossrail Context Map



Central Section

Tottenham Court Road Station



	Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1	91-101 Oxford Street (11/10055/FULL)	92	0	1,004	Full
2	Tottenham Court Road East (11/10043/FULL)	0	24,225	3,869	Full (Application)
3	Tottenham Court Road East (11/10045/FULL)	0	4,185	0	Full (Application)
4	61-67 Oxford Street (12/03063/FULL)	0	1,640	3,701	Full
5	London Trocadero (09/03295/FULL)	0	1,543	4,597	Full
6	London Trocadero (12/02540/FULL)	9	0	0	Full
7	Trenchard House (12/03439/FULL)	78	0	780	Full
8	Academy House (12/02082/FULL)	0	3,503	1,583	Full
9	Fenton House (11/01353/FULL)	7	8,469	860	Full
10	Royal Mail - Western District Office (13/04844/FULL)	162	32,972	0	Full
11	Central Cross (2012/2232/P)	0	0	3,333	Full
12	23-24 Newman Street (10/03464/FULL)	23	566	0	Full
13	26-48 Oxford Street (12/09915/FULL)	18	0	6,951	Full
14	Colegrave House - The Plaza (12/12420/FULL)	0	17,335	9,160	Full (Application)
15	Middlesex Hospital Annexe (2010/2205/P)	142	0	0	Full (Application)
16	80 Charlotte Street (Saatchi Block) (2010/6873/P)	55	35,567	235	Full
17	251-258 Tottenham Court Road (2013/3880/P)	0	9,198	1,520	Full (Application)
18	31-36 Foley Street (13/06795/FULL)	34	4,532	0	Full (Application)
19	Fitzroy Place (Middlesex Hospital) (11/08831/FULL)	291	29,219	1,922	Full
20	Centre Point (2013/1957/P)	131	0	268	Full (Application)
21	St Georges Court (2012/1400/P)	0	21,485	905	Full
22	Tybalds Estate (2013/1014/P)	93	0	0	Full (Application)
23	Fisher Street Over Site Development (2013/1477/P)	22	0	0	Full (Application)
24	Parker House (2012/6132/P)	43	0	0	Full
25	Princes House (12/09220/FULL)	21	0	409	Full
26	27-28 King Street (12/09856/FULL)	0	13	1,298	Full
27	19A, 22-25 Floral Street (13/05128/FULL)	37	0	2,138	Full (Application)
28	17-19 Bedford Street (12/03946/FULL)	17	0	1,004	Full
29	Former Alhambra House (13/04922/FULL)	60	0	0	Full (Application)
30	Shaffesbury House (2012/4187/P)	0	3,511	3,511	Full
31	Central Saint Giles (St Giles Court) (2009/4729/P)	109	0	0	Full
32	St Giles Circus - Denmark Place (2012/6858/P)	27	1,418	2,023	Full (Application)
33	Mercers' Covent Garden Estate - Block C (10/10685/FULL)	24	0	0	Full (Application)
34	Hop House (12/00739/FULL)	29	0	0	Full
35	8 St James's Square (10/11022/FULL)	1	9,719	0	Full
36	Redevelopment of St James's Market (12/08886/FULL)	0	27,424	5,800	Full (Application)
37	10-11 Babmaes Street (07/01534/FULL)	14	17,598	0	Full
38	Oxford House (13/01594/FULL)	89	0	3,330	Full
39	Eagle Place (St James's Gateway) (10/04744/FULL)	16	8,248	2,711	Full
40	London Trocadero (12/02540/FULL)	0	0	3,140	Full
41	London Trocadero (12/02540/FULL)	0	0	2,521	Full
42	Quadrangle (12/04624/FULL)	12	8,225	3,132	Full
43	Ham Yard (5-10- Denman Street) (10/06798/FULL)	24	0	0	Full
44	12 Sherwood Street (12/12041/FULL)	38	1,774	386	Full
45	Site at Ogle Street (10/00366/FULL)	22	0	0	Full
46	Central St Martin's College of Art (11/11743/FULL)	13	0	4,479	Full
47	34-36 Golden Square (11/06391/FULL)	0	5,436	894	Full
	TOTALS	1,753	277,805	77,464	

Description of Station and Surrounding Area

Tottenham Court Road station forms part of the central section of the Crossrail route. Two station entrances are located at the eastern end of Oxford Street (at Dean Street and St Giles Circus); the eastern entrance also acts as a gateway to the wider Mid-Town area centred on Holborn. It currently provides a mixture of retail, leisure, office and residential land uses at a high density; however the existing stock is of a significantly lower quality than that provided at the western end of Oxford Street.

Growth Potential

Tottenham Court Road was identified in the 2012 Crossrail Property Impact Study as a 'Place to Watch', with high potential for regeneration, including the redevelopment and intensification of existing sites for commercial retail, office and residential uses. This is supported by the Crossrail over site development at Tottenham Court Road (West) for 92 residential units and retail space in Oxford Street for which permission has been granted.

In particular Crossrail is directly supporting the regeneration of the St Giles area, contributing to extensive new urban realm. In addition Crossrail is seen as an opportunity through improved accessibility to upgrade the retail offer at the eastern end of Oxford Street. These two initiatives have the potential to be transformational in terms of the improved environment and growth.

Application Analysis

There have been 20 planning applications within 500m of the Tottenham Court Road Crossrail station (as measured from the mid-point between the station entrances) since 2009, and 27 applications within 1km (as measured from the mid-point between the station entrances). These applications will provide circa 1,800 new residential units, 278,000 sqm of office space, and 77,500 sqm of retail space.

Site	Applications	Resi Units	Office Space (sqm)	Retail Space (sqm)
500 m	20	761	115,247	49,504
500-1000 m	27	992	162,558	27,960
TOTALS	47	1,753	277,805	77,464

In terms of delivery, 5 of the applications have been completed providing circa 460 residential units, 29,000 sqm of office floorspace and 7,400 sqm of retail floorspace; and a further 4 have been started that will provide 140 residential units, 9,000 sqm of office and 1,600 sqm of retail.

The number of applications submitted over the period from 2009 has varied significantly, ranging from just 2 applications in 2009, to 22 in 2012. The first mention of Crossrail within a planning application was in 2010, for a mixed use application within 1000m of the station.

Across all applications, around half mention Crossrail as part of the supporting documentation; and these references tend to be brief, or relate solely to funding. There is, however, a marked difference between schemes located within 500m of a station, where 65% of applications mention Crossrail, compared to those located within 1000m, where only 33% discuss its impact.

KEY APPLICATIONS

10

ROYAL MAIL, RATHBONE PLACE DEVELOPER: GREAT PORTLAND ESTATES



Description of Scheme:

- A mixed use scheme providing 162 residential units and 33,000 sqm of office space plus flexible space for use as shops (Class A1) and/or restaurant (Class A3) and/or bar (Class A4).
- Located within 500 sqm of Crossrail station.
- Not yet started.

Role of Crossrail:

- The Planning Statement notes that delivery of Crossrail will increase the potential of the Tottenham Court Road Opportunity Area to act as a catalyst for further private sector investment and will improve the built fabric, commercial performance, and overall contribution that the Opportunity Area makes to the city.
- The Transport Statement notes that approximately 3,000 daily trips from the office, 200 from the residential and A1 retail, and around 500 from the flexible (restaurant) space will be transferred onto Crossrail when the railway opens. This will alleviate pressure on the existing transport network.

KEY APPLICATIONS

19

FITZROY PLACE DEVELOPER: EXEMPLAR PROPERTIES LTD



Description of Scheme:

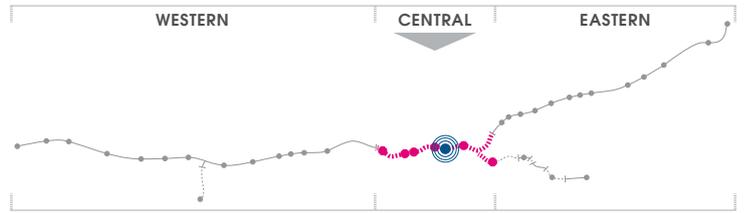
- Development of 9 to 11 storey buildings plus two basement levels for mixed use purposes comprising 291 residential units (Class C3), office (Class B1), retail (Class A1), financial and professional services (Class A2), restaurant (Class A3) and community/health uses (Class D1).
- Site under construction.
- Located within 500m of the western Tottenham Court Road entrance (Dean St) and 1000m from the eastern entrance.

Role of Crossrail:

- The Design and Access Statement notes that the new Crossrail entrances at Tottenham Court Road and Dean Street will transform the area and involve the redevelopment of many street front retail units on Oxford Street

Liverpool Street

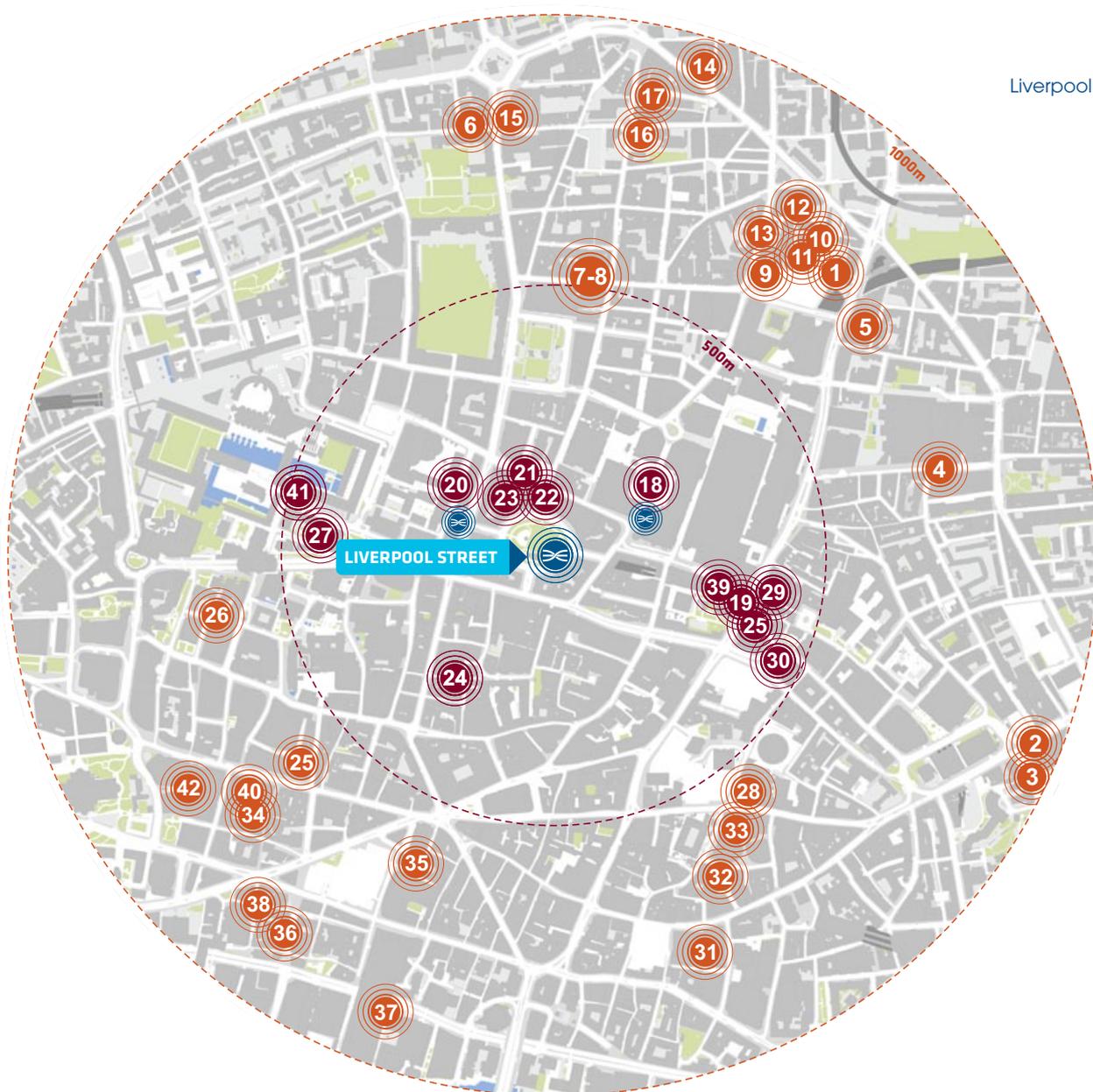
Case Study



Crossrail Context Map



Central Section



Liverpool Street Station

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 Principal Place (Bishops Place) (2011/0698)	299	73,220	2,349	Full
2 Aldgate Union / Aldgate Place (PA/13/00218)	463	2,330	1,307	Full
3 Beagle/Maersk House (PA/13/00305)	291	11,167	1,940	Full (Application)
4 London Fruit & Wool Exchange (PA/11/02220)	0	37,417	1,142	Full
5 17 Blossom Street (PA/10/02764)	8	17,705	1,903	Full
6 White Collar Factory (P101833)	9	32,625	728	Full
7 Pinnacle Buildings (P111579)	8	8,543	0	Full
8 Pinnacle Building (P090130)	8	8,054	0	Full
9 The Stage (Plough Yard) (2012/3871)	385	26,020	4,621	Full
10 87-93 Curtain Road (2012/3879)	9	1,507	0	Full
11 Shoreditch Village (2012/3792)	8	1,686	998	Full
12 Site at Hearn Street (2012/3871)	385	26,060	4,621	Full
13 Electricity Sub Station Hearn Street (2012/3873)	0	15,313	614	Full
14 Interglobe House (2010/2143)	9	3,265	390	Full
15 18-30 Leonard Street (P090168)	47	2,238	0	Full
16 102-108 Clifton Street (2008/2333)	7	1,078	0	Full
17 62 Paul Street (2010/3224)	9	1,655	567	Full
18 5 Broadgate (10/00904/FULEIA)	0	105,369	0	Full
19 119-121 Bishopsgate (09/00192/FULLMAJ)	0	7,150	1,430	Full
20 101 Moorgate (11/00773/FULEIA)	0	6,595	277	Full
21 120 Moorgate (11/00231/FULMAJ)	0	12,740	3,371	Full (Application)
22 Finsbury Circus House (10/00571/FULMAJ)	0	19,635	0	Full
23 River Plate House 7-11 Finsbury Circus (12/00811/FULMAJ)	0	22,251	781	Full
24 Tokenhouse Yard Development (12/00474/FULMAJ)	0	17,276	129	Full
25 100 Cheapside (09/00353/FULMAJ)	0	11,551	1,336	Full
26 125 Wood Street (12/00055/FULL)	0	9,254	69	Full
27 London Wall Place (Former St Alphage East and West) (10/00832/FULEIA)	0	64,145	1,120	Full
28 107 Leadenhall Street (09/00499/FULL)	0	9,935	2,003	Full
29 Heron Plaza (Stone House/ Staple Hall) (10/00152/FULEIA)	120	0	1,083	Full
30 63 St Mary Axe (11/00306/FULL)	0	1,374	0	Full
31 United Dominions House (11/00153/FULMAJ)	0	12,838	1,412	Full
32 Land Bounded By 120 Fenchurch Street (11/00854/FULEIA)	0	38,150	4,857	Full
33 The Scalpel (12/00870/FULEIA)	0	52,429	1,051	Full
34 Watling Court (13/00339/FULMAJ)	0	3,778	753	Full (Application)
35 Bloomberg Place (Formerly Walbrook Square) (11/00935/FULEIA)	0	100,368	4,433	Full
36 36 Queen Street (11/00937/FULL)	0	541	759	Full
37 33 King William Street (11/00933/FULMAJ)	0	26,067	0	Full
38 Miniver House (09/00852/FULMAJ)	0	2,974	0	Full (Application)
39 119-121 Bishopsgate (09/00192/FULLMAJ)	0	7,150	1,430	Full (Application)
40 Watling Court (13/00339/FULMAJ)	0	9,778	752	Full (Application)
41 Roman House (11/00295/FULMAJ)	90	0	0	Full
42 1 Bow Churchyard (13/00764/FULL)	0	5,214	0	Full (Application)
TOTALS	2,155	816,445	48,226	

Description of Station and Surrounding Area

Liverpool Street station lies on the central line section of Crossrail, in the heart of the City of London, between the Crossrail stations of Farringdon to the west and Whitechapel to the east. The Crossrail station will have two station entrances: Moorgate to the west and Broadgate to the east. The main influence upon development here is the site's central location and the demand for high quality prime office space.

Growth Potential

Following the arrival of Crossrail, property values around Liverpool Street are expected to increase, and the supply of office stock is anticipated to grow either through new build or change of use.

Growth as a result of Crossrail is likely to be focussed in certain areas including the City Fringe (Old Street and Shoreditch) and the Eastern Cluster area to the south of Liverpool Street where Crossrail could support future office floorspace.

The extensive Crossrail urban realm proposals for Liverpool Street, around the eastern entrance to the new Liverpool Street Crossrail station, are likely to cement Broadgate as a prime City location. At Moorgate, the urban realm coupled with the redevelopment of Moorgate and Moorfields over the new stations will significantly enhance the environment and attractiveness of the area.

Application Analysis

Since 2009, a total of 13 applications have been submitted within 500m of the new Crossrail station (as measured from the mid-point between the two entrances), which will provide 210 residential units, 275,236 sqm of office floorspace and 11,000 sqm of retail. An additional 29 applications have been submitted for schemes located between 500m and 1000m (as measured from the mid-point between the two entrances) from the station, proposing c. 2,000 residential units, 540,000 sqm of office and 37,000 sqm of retail.

Site	Applications	Resi Units	Office Space (sqm)	Retail Space (sqm)
500 m	13	210	275,236	10,957
500-1000 m	29	1,945	541,209	37,269
TOTALS	42	2,155	816,445	48,226

Of the 38 applications, 37 include an element of office floorspace, providing a total of 794,000 sqm of floorspace. Schemes located within 500m of the station provide on average 27,000 sqm of office floorspace per application compared to 16,000 sqm for schemes located between 500m and 1000m from the station. A large proportion of office stock will come forward in significant schemes, with the five largest developments expected to deliver half the total office floorspace (c.400,000 sqm).

28 of the 38 identified schemes include a retail element, providing a total of 46,000 sqm of floorspace. One third of retail floorspace will come forward in schemes located within 500m of the station.

There is a clear difference evident between the percentage of applications submitted within 500m and 500-1000m of the new station in terms of the level of discussion around Crossrail and perceived level of importance by the applicant.

Within 500m of the station, 60% of applications discussed Crossrail to a significant degree in the planning application documents. This compares to 27% of applications discussing Crossrail to a significant degree within a 500-1000m radius, and 18% showing a minor mention.

ALDGATE UNION / ALDGATE PLACE

DEVELOPER:
ALDGATE PLACE (GP) LTD



Description of Scheme:

- The largest application in the Liverpool Street station catchment area in terms of residential units. Given the short distance between stations in the City it also lies within the 1000m catchment area of Whitechapel
- 2013 mixed use application for provision of 463 private and affordable residential dwellings, 2,330 sqm office, 1,307 sqm of retail and 8,360 sqm of hotel floorspace.
- Located 1000m from the station.
- The Section 106 agreement has yet to be signed and therefore the development has yet to commence.

Role of Crossrail:

- The Design and Access Statement notes proximity to rapid and reliable public transport links, for example Crossrail is a key locational driver for 'mega-schemes' such as Aldgate Union.
- Crossrail will create a direct public transport link between Canary Wharf and Heathrow for the first time and reduce journey times to Central London.
- The arrival of Crossrail in Liverpool Street is also specifically identified as a factor in the anticipated recovery of demand for commercial space in the city fringe.

LONDON WALL PLACE

DEVELOPER: HAMMERSON
(CENTURION) LTD



Description of Scheme:

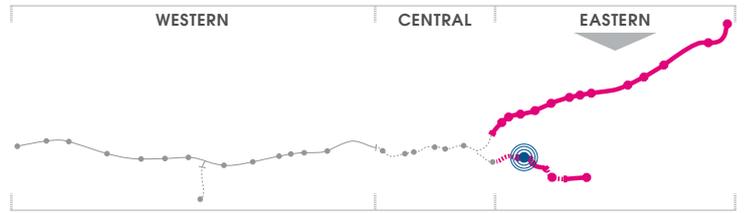
- Two buildings comprising an 18 storey west building and 14 storey east building to provide 64,145 sqm of office floorspace and 1,120 sqm of retail floorspace.
- Permission granted in August 2011.
- Located within 500m of the station.
- Work on the scheme commenced in September 2013, and is due for completion in 2014.

Role of Crossrail:

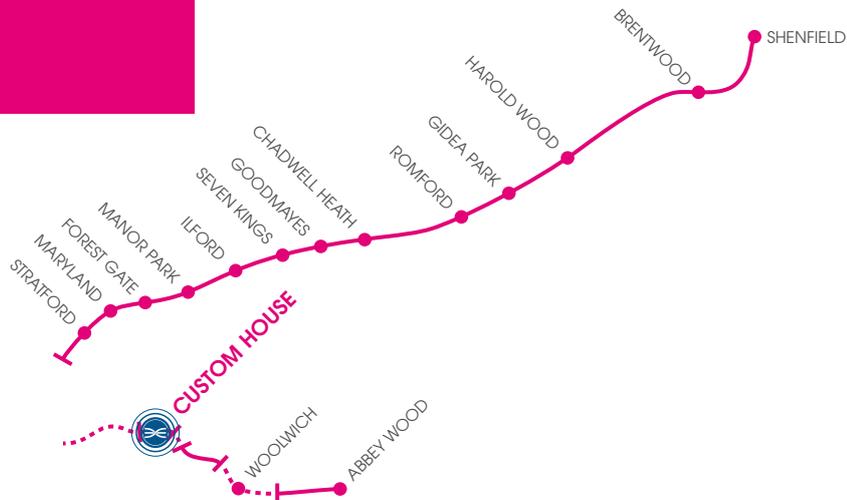
- Planning documentation notes that Crossrail will decrease the impact of the development on the existing transport network, and will enhance the sustainability credentials of the site by reducing reliance on cars.
- The Transport Assessment states that broadly 25% of Central and 10% of Metropolitan, District and Hammersmith & City line development trips currently forecast to use the Underground may use Crossrail.

Custom House

Case Study



Crossrail Context Map



Eastern Section



Custom House Station

Description of Station and Surrounding Area

Custom House Station is located on the eastern section of the Crossrail route. It is located in the London Borough of Newham in east London, and lies to the north of Royal Victoria Dock. Traditionally the surrounding area has been used for dock-related activities; however following the decline of these commercial and industrial uses, the economic base has broadened. As a consequence of significant investment including the construction of the Excel Exhibition Centre and the extension of the Docklands Light Railway, the character of the area has shifted, and residential, educational and leisure uses have been introduced.

The significantly improved accessibility to Canary Wharf and central London which will be provided by the new Crossrail station will provide the opportunity for major development and regeneration of the area to take place.

Growth Potential

Custom House, and the wider Canning Town area, were identified in GVA's 2012 Crossrail Property Impact Study as having significant potential for growth, largely due to the availability of land and the mixture of heritage and modern development which make it an attractive location for investment.

The 2012 Property Impact Study notes that the station's location adjacent to Excel conference/exhibition space and the availability of large sites for development provide the basis for very significantly increased development market activity for residential and commercial employment uses in tandem.

Application Analysis

There has been 1 planning application within 500m of Custom House since 2009, and an additional 7 applications within 1km. These 8 applications will provide circa 9,000 new residential units, 32,000 sqm of office space, and 4,100 sqm of retail space. The majority of the development will be coming forward in two key schemes: Silvertown Quays and Minoco Wharf.

Of these 8 schemes 2 have been completed, both of which are at Waterside Park, and have delivered 318 residential units and 308 sqm of retail floorspace. The remaining 6 schemes have not yet been started.

The applications were submitted between 2009 and 2011, with an even distribution across the period. The most recent application was for 34 residential units at 75 Berwick Road in 2013, which is within 500m of the scheme. This application discusses Crossrail in the Design and Access Statement, and identifies how the scheme will fit into the wider regeneration of the area which is anchored by Crossrail, and notes the improvements to public transport connections that Crossrail will bring in 2018.

Crossrail is discussed in around half the applications for schemes located within 100m of the Crossrail station. Of the schemes that do make reference to Crossrail in the supporting document, the majority refer to the wider growth opportunities provided by Crossrail, or to the public transport improvements.

Site	Applications	Resi Units	Office Space (sqm)	Retail Space (sqm)
500 m	1	34	0	0
500-1000 m	7	8,964	31,658	4,134
TOTALS	8	8,998	31,658	4,134

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 28-34 Tidal Basin Road (09/02013/FUL)	170	0	525	Full
2 The Crystal (Land West of Royal Victoria Dock) (10/01576/FUL)	0	15,550	51	Full
3 The Pump House (Site We8) (10/00369/FUL)	161	1,108	0	Full
4 Silvertown Quay (10/00860)	4,930	0	0	Full
5 Royal Wharf (Manhattan/ Minoco Wharf) (11/00856/OUT)	3,385	15,000	3,250	Outline
6 Waterside Park - 1B Heron Crescent (09/02087/REM)	151	0	308	Full/Details Reserved Matters
7 Waterside Park - 2/D - Connaught Heights (10/01015/REM)	167	0	0	Full/Details Reserved Matters
8 75 Berwick Road (13/00927/FUL)	34	0	0	Full (Application)
TOTALS	8,998	31,658	4,134	

SILVERTOWN QUAYS

DEVELOPER: CHELSFIELD AND FIRST BASE



Description of Scheme:

- The 50 acre (20 hectares) site is located on the south side of the Royal Victoria Dock opposite ExCel
- The site was first identified for development in 2001, but has been stalled.
- In June 2013 a £1.5bn deal was signed with Silvertown Partnership (Chelsfield and First Base Development Consortium) for redevelopment of the site to provide 9,000 new jobs in a new quarter.
- As part of the plans a new bridge will be built to connect the area to the ExCel centre and provide access to the new Crossrail station.
- Master Development Agreement (MDA) has been signed with the GLA, and an outline planning application will be submitted in the next 12 months.
- Start on site expected in 2014/15 with the first businesses moving in during 2017.

Role of Crossrail:

- Whilst a planning application has not yet been submitted, the developer has been quoted as saying:

“We already have 3.5 million people a year coming to this site each year via the DLR to visit ExCel our neighbours next door and the arrival of Crossrail in 2018 is going to make this site much more accessible with the City of London being just ten minutes away and the West End only 15 minutes”.

MINOCO WHARF

DEVELOPER: BALLYMORE



Description of Scheme:

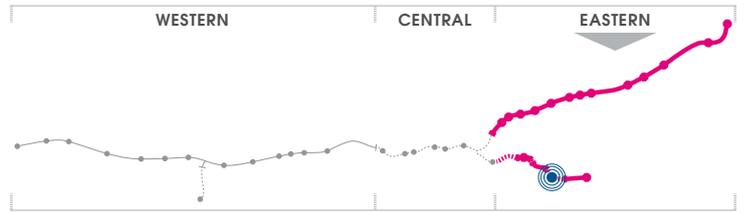
- A 17 ha site located in the Royal Docks, between the Barrier Point residential development to the east and industrial units to the west.
- The application for the site was first submitted in June 2006 but was later withdrawn. It was resubmitted in June 2007, and permission granted for a mixed use development in 2008.
- Following acquisition of additional land, Ballymore submitted a new outline application in 2011, which was approved in March 2012, for the following:
 - up to 330,000 m² of residential (C3) floorspace
 - up to 15,000 m² of employment uses (B1)
 - up to 3,250 m² of retail floorspace (A1)
 - up to 750 m² of financial and professional floorspace (A2)
 - up to 750 m² of hot food / take away floorspace (A3 and A5)
 - up to 750 m² of pub and restaurant floorspace (A4)
- up to 9,600 m² of “non residential institutional” floorspace to include a new primary school, creches / nursery schools and community facility (D1)
- up to 3,000 m² of assembly and leisure floorspace to include gym and fitness centres (D2)
- new public realm including a hierarchy of open spaces including a riverside park
- creation of areas of private open space
- riverside walkway, including a link to the proposed Silvertown Pier
- Located within 1000m of Crossrail Station

Role of Crossrail:

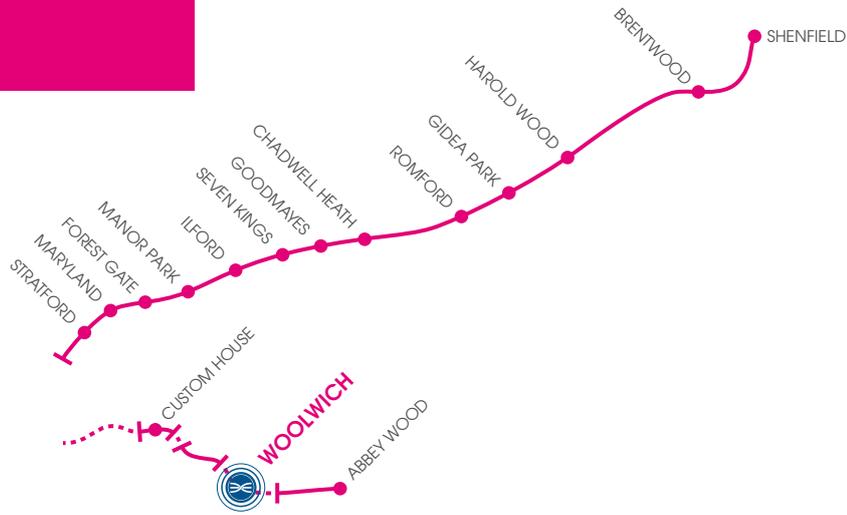
- The Design and Access Statement notes that the new Crossrail stations will provide excellent accessibility to Canary Wharf, central London and the southeast of England.
- The Planning Statement notes that transport improvements including Crossrail has made the site appropriate for a high density, residentially led, mixed use development. The suitability of the site for residential use in particular has been transformed by the arrival of Crossrail and the opening of the DLR.

Woolwich

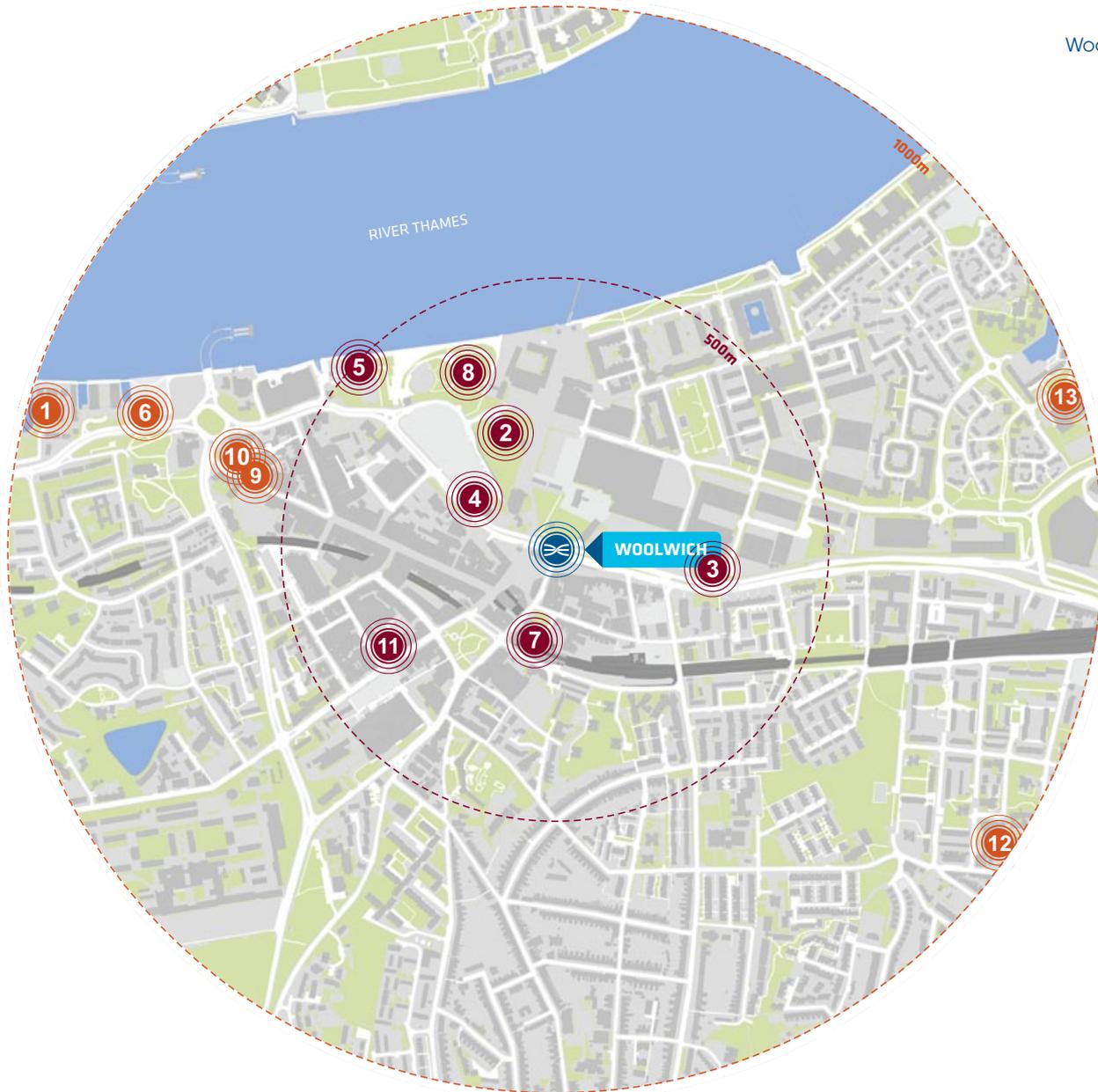
Case Study



Crossrail Context Map



Eastern Section



Woolwich Station

Description of Station and Surrounding Area

Woolwich station lies on the south east branch of the eastern line section of Crossrail, between Custom House to the west and Abbey Wood to the east. The main trend is the increased popularity of the area as a residential location, led by the Royal Arsenal development, as well as the recognised ability of Woolwich to become a Metropolitan Town Centre as identified in the London Plan.

Growth Potential

Woolwich is identified in the Crossrail Property Impact Study 2012 as a 'Place to Watch'. Crossrail is predicted to have significant impact on the residential and commercial market in the surrounding area due to the substantial improvement in journey times and new connections to major economic hubs such as Canary Wharf and central London.

The improved accessibility will support Woolwich to grow into a Metropolitan Town Centre and new high quality waterfront location, by extending the catchment, and by raising the profile and visibility of the area to occupiers and investors.

Application Analysis

Since 2009, a total of 7 applications have been submitted within 500m of the new Crossrail station, which will provide 3,500 residential units, 5,800 sqm of office floorspace and 6,000 sqm of retail. An additional six applications have been submitted for schemes located between 500m and 1000m from the station, proposing c. 720 residential units, 740 sqm of office and 7,000 sqm of retail.

The developments in the pipeline in Woolwich are predominantly residential led, whereas schemes proposed in more central locations, such as Liverpool Street, tend to be commercially led. Of the fourteen applications in Woolwich, only two do not include an element of residential floorspace; however nearly half the residential units are coming forward in a single scheme, the Royal Arsenal Waterfront

The majority of office floorspace will be provided in schemes located within 500m of the station, with 4,688 sqm proposed as part of the Royal Arsenal over station development. There is more than double the amount of retail development proposed compared to office floorspace.

Site	Applications	Resi Units	Office Space (sqm)	Retail Space (sqm)
500 m	7	3,568	5,809	6,173
500-1000 m	6	718	738	4,462
TOTALS	13	4,286	6,547	10,635

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 King Henry's Dock (11/1584/F)	100	0	0	Full
2 Royal Arsenal 3 - Laboratory Square (11/1632/F)	252	736	736	Full
3 Royal Arsenal 4 - Over Station Development - West (11/2382/O)	592	4,688	4,688	Outline
4 Royal Arsenal 2 - The Warehouse (09/1457)	290	385	385	Full
5 Royal Arsenal - 2013 Masterplan - The Waterfront (13/0117/O)	2,032	0	0	Outline
6 Mast Quay - Phase 2 (10/0161)	204	738	0	Full
7 Woolwich Arsenal DLR Airspace (10/2612/F)	51	0	364	Full
8 Royal Arsenal 5 - Block C (12/1168/F)	92	0	0	Full
9 114-130 Powis Street (12/0160/F)	0	0	3,330	Full
10 Former Co-op Building (12/0487/F)	74	0	0	Full
11 Woolwich Central - Phase 2 (10/2440/R)	259	0	0	Full
12 Plumstead Reservoir (10/1404/F)	44	0	0	Full
13 Southmere Village (Tavy Bridge Estate) (12/00876/FULM)	296	0	1,132	Full
TOTALS	4,286	6,547	10,635	

KEY APPLICATIONS

5

ROYAL ARSENAL - 2013 MASTERPLAN THE WATERFRONT DEVELOPER: BERKELEY HOMES (EAST THAMES) LTD



Description of Scheme:

- The Waterfront is a residential led outline application incorporating 2,032 residential units supported by 2,442 sqm of non-residential floorspace.
- Located within 500m to 1000m of the station.
- Development is yet to commence.

Role of Crossrail:

- All Royal Arsenal applications post 2010 emphasise the importance of Crossrail.
- Crossrail is identified as being very positive for Woolwich as it will bring about regeneration and draw in investment.
- Public transport will be strengthened by Crossrail; therefore reliance on the private car will be vastly reduced.
- Journey patterns are expected to change as new destinations such as Heathrow Airport become more accessible.
- The proposed development will assist with the delivery of the Woolwich Crossrail Station.

KEY APPLICATIONS

6

MAST POND WHARF DEVELOPER: MAST POND WHARF LTD



Description of Scheme:

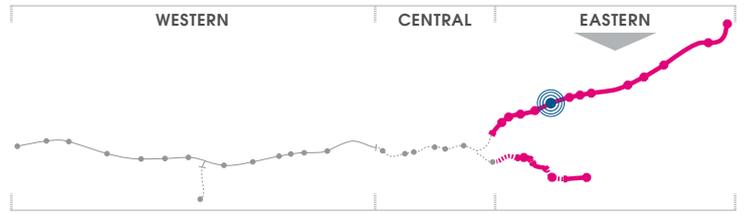
- 16 storey building to provide 100 residential units and new purpose built community facilities for angling club.
- Located on the south bank of the Thames River within the Woolwich Dockyard Estate.
- Located within 1000 m of Crossrail station.
- Development has not yet commenced.

Role of Crossrail:

- Supporting documentation notes that the additional capacity that Crossrail will bring to the network will increase the viability of the scheme and improve its sustainability credentials.

Ilford

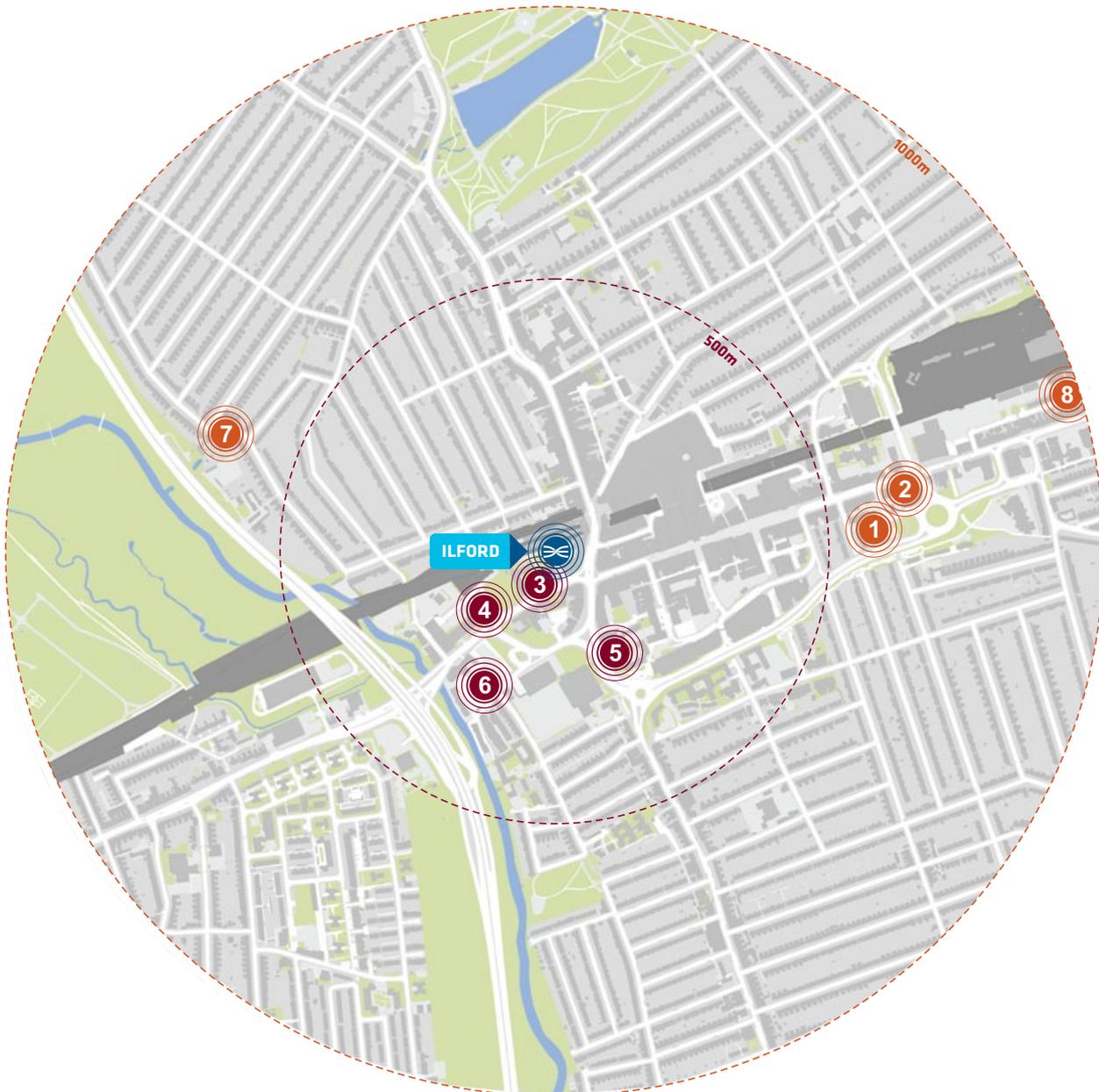
Case Study



Crossrail Context Map



Eastern Section



Ilford Station

Description of Station and Surrounding Area

Iford station is located on the eastern surface section of the Crossrail route in outer London.

Iford is a Metropolitan Centre in the London Borough of Redbridge. It is one of the largest town centres in London and provides retail, leisure and commercial facilities to the surrounding substantial residential population. The office stock is extensive but the quality is mixed, and there is evidence of over supply following the loss of large occupiers.

Growth Potential

Iford is identified as having significant potential for growth following the arrival of Crossrail. The key driver of change is likely to be a shift in the investor, developer and residential perceptions of the centre which will stimulate further growth in Iford. This will be enhanced by the location of the Crossrail station close to the town centre.

Application Analysis

In Iford, there have been four applications within 500m of the station, and four within 1000m. These will deliver circa 1,140 new residential units, 3,640 sqm of office and 5,500 sqm of retail.

Site	Applications	Resi Units	Office Space (sqm)	Retail Space (sqm)
500 m	4	871	1,754	5,126
500-1000 m	4	269	1,894	405
TOTALS	8	1,140	3,648	5,531

One scheme has been completed in Iford since 2009 (Pioneer Point) and one, submitted in 2013, has commenced (rear of Icon Building). The remaining six applications have not yet been started. Three of the eight applications discuss Crossrail in the supporting documentation.

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 Riches Road (2978/10)	24	0	0	Outline
2 Central Point (0229/12)	101	1,894	405	Full
3 Valentines House (2035/13)	78	0	0	Full (Application)
4 Rear of the Icon Building (1279/13)	141	0	0	Full (Application)
5 Pioneer Point (former Pioneer Market) (0100/09)	294	1,753	4,261	Full
6 Britannia Music Site (2434/12)	358	1	865	Full
7 61-63, & R/O 59-79, Wanstead Park Road (1880/10)	39	0	0	Full
8 501-535 High Road (2483/10)	105	0	0	Full
TOTALS	1,140	3,647	5,531	

FORMER BRITANIA MUSIC SITE

DEVELOPER: DURKAN ESTATES



Description of Scheme:

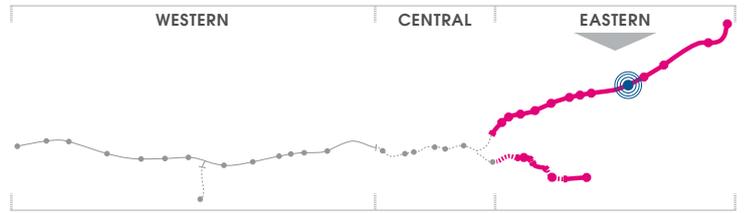
- The original consent (0141/09) was granted in 2010 for mixed use development comprising 332 residential dwellings, office space, retail and live/work units within four separate buildings including a 23 storey tower. This consent was not implemented.
- A S73 application for variation of condition (2434/12) was submitted in 2012 for an additional 22 residential units and the removal of D1/D2 or live/work units. Granted permission in October 2013.
- Located within 500m of Crossrail station.
- Development not yet started.

Role of Crossrail:

- The future Crossrail station is identified as a 'benefit' in the supporting documentation and the area is described as undergoing a period of regeneration.
- Crossrail will improve connections to Stratford and Romford which are establishing themselves as 'satellite towns', and to Canary Wharf where significant financial and business activity growth is anticipated.
- Crossrail will also provide fast and frequent connections to destinations such as Heathrow Airport, Paddington Station and Reading.

Romford

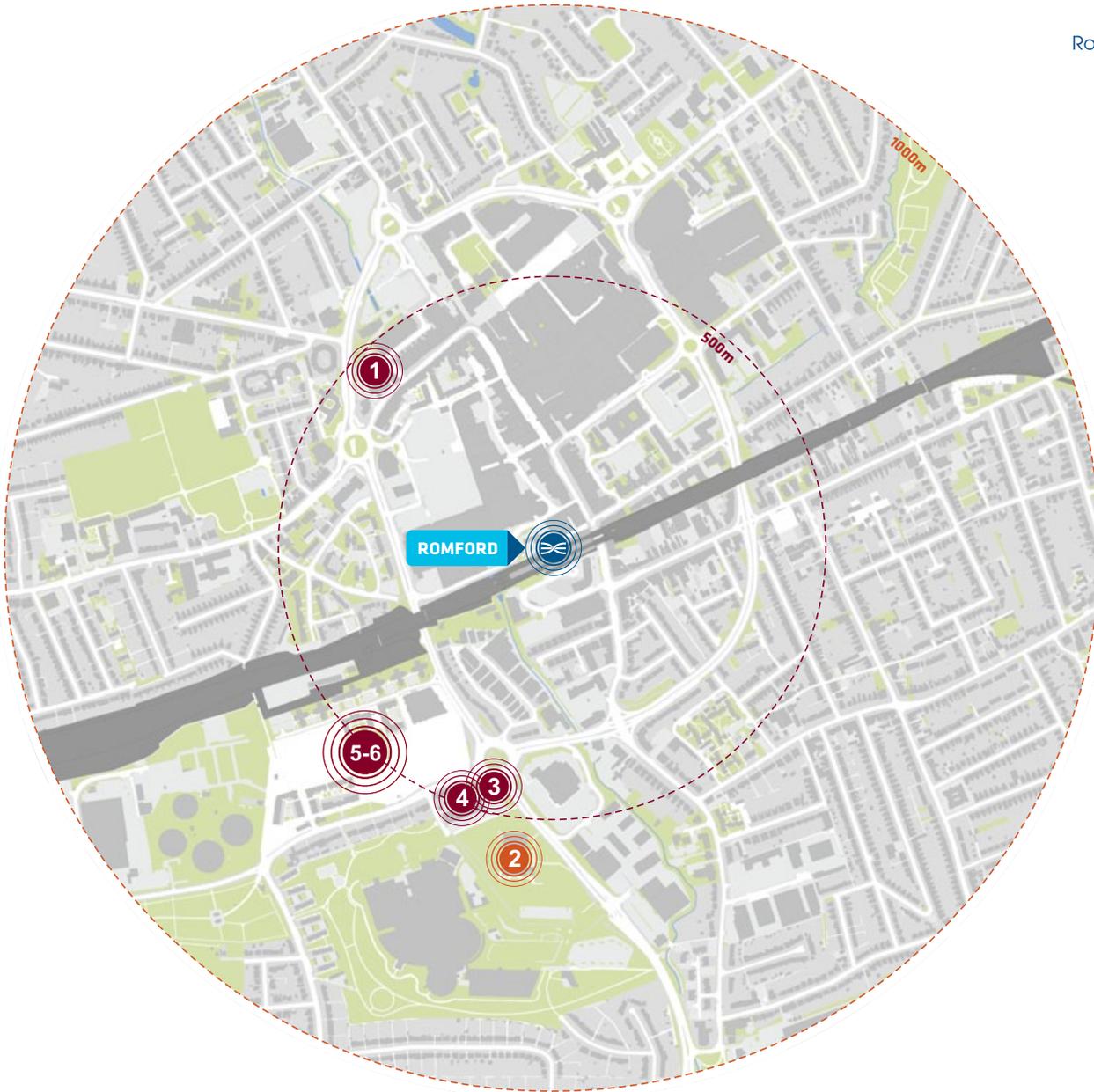
Case Study



Crossrail Context Map



Eastern Section



Romford Station

Description of Station and Surrounding Area

Romford station is located on the eastern surface section of the Crossrail route in outer London. Romford, which is a Metropolitan Centre, has seen significant change over the last ten years, and is now the fourth largest shopping centre in London in terms of total floorspace (source: LB Havering). The station will sit in the heart of the town centre, in close proximity to the primary retail, commercial and leisure areas.

Growth Potential

Romford is identified in GVA's 2012 Crossrail Property Impact Study as having significant potential for growth. The report sets out that Romford's designation as a Metropolitan Town Centre, coupled with LB Havering's stated policies to promote significant new residential and mixed use development within the town centre, will help support market interest and activity.

Three of the schemes have been completed (two of which were submitted in 2009), whilst the remaining three have not yet been started. Two applications discuss Crossrail, one is located within 500m of the station (Woolpack PH) and the other (Oldchurch Hospital West) is located between 500m and 1000m from the station. There have been no applications submitted in Romford since 2012.

Application Analysis

There have been five planning applications within 500m of Romford since 2009, and an additional one application within 1km. These six applications will provide circa 1,120 new residential units and 9,820 sqm of retail space.

Site	Applications	Resi Units	Office Space (sqm)	Retail Space (sqm)
500 m	5	1,046	0	92
500-1000 m	1	71	0	9,732
TOTALS	6	1,117	0	9,824

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 Woolpack PH / Secrets (P0759.11)	74	0	92	Full
2 Romford Ice Rink (P1468.12)	71	0	9,732	Full
3 Century House (P1020.12)	36	0	0	Full
4 Reflections (Oldchurch Hospital East) (P1638.09)	493	0	0	Full
5 Reflections (Oldchurch Hospital East) - Block 8 (P1406.12)	77	0	0	Full (Application)
6 Oldchurch Park (Oldchurch Hospital West) (P0975.10)	366	0	0	Full
TOTALS	1,117	0	9,824	

KEY APPLICATIONS

2

ROMFORD ICE RINK

DEVELOPER: OPTIMISATION DEVELOPMENTS LTD
(WHOLLY-OWNED SUBSIDIARY OF MORRISON'S SUPERMARKETS LTD)



Description of Scheme:

- A mixed use development comprising foodstore, residential development, car parking and petrol filling station together with associated access and landscaping on the site of the Romford Ice Arena at Rom Valley Way, Romford.
- Located within 1000 sqm of Crossrail Station.
- Not yet started (awaiting S106 agreement).

Role of Crossrail:

- The Planning Statement notes that accessibility will be greatly enhanced with the completion of Crossrail which will provide through-London services and reinforce the town's role as a "gateway" into Essex and beyond.

KEY APPLICATIONS

4

OLDCHURCH HOSPITAL SITE (EAST AND WEST)

DEVELOPER:
WEST SITE – SWAN HOUSING, EAST SITE – TAYLOR WIMPEY

WEST SITE



Description of Scheme:

- Eastern Site – permission was granted in 2011 for the redevelopment of the former Oldchurch Hospital to provide 493 residential units, an energy centre, a local park, car parking, access and internal roads and hard and soft landscaping.
- Western Site – permission granted in 2011 for 366 residential units on the eastern part of the site (30% affordable), reduced from 457 units in original application.
- Located within 500 m of Crossrail station.
- Both schemes are currently under construction.

EAST SITE



Role of Crossrail:

Eastern Site

- GLA Stage II Report (2010) notes that the proposed density of 144 units per hectare is appropriate for the site because it is located on the edge of Romford Town centre and close to a future Crossrail Station.
- No reference in planning application.

Western Site

- Planning Statement notes that site is ideally suited for promoting the use of modes other than the car, and references the role of Crossrail in improving accessibility to the west end.
- Transport Assessment notes that the future PTAL rating of the site will be improved by Crossrail.

Appendix 2: Station Data Sheets

[Maidenhead](#)

[Taplow](#)

[Burnham](#)

[Slough](#)

[Langley](#)

[Iver](#)

[West Drayton](#)

[Heathrow Airport 1,2,3](#)

[Heathrow Airport 4](#)

[Hanwell](#)

[West Ealing](#)

[Ealing Broadway](#)

[Acton Main Line](#)

[Paddington](#)

[Bond Street](#)

[Farringdon](#)

[Whitechapel](#)

[Canary Wharf](#)

[Abbey Wood](#)

[Maryland](#)

[Stratford](#)

[Forest Gate](#)

[Manor Park](#)

[Seven Kings](#)

[Goodmayes](#)

[Chadwell Heath](#)

[Gidea Park](#)

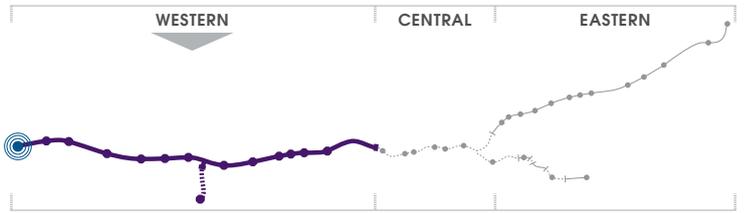
[Harold Wood](#)

[Brentwood](#)

[Shenfield](#)

Maidenhead

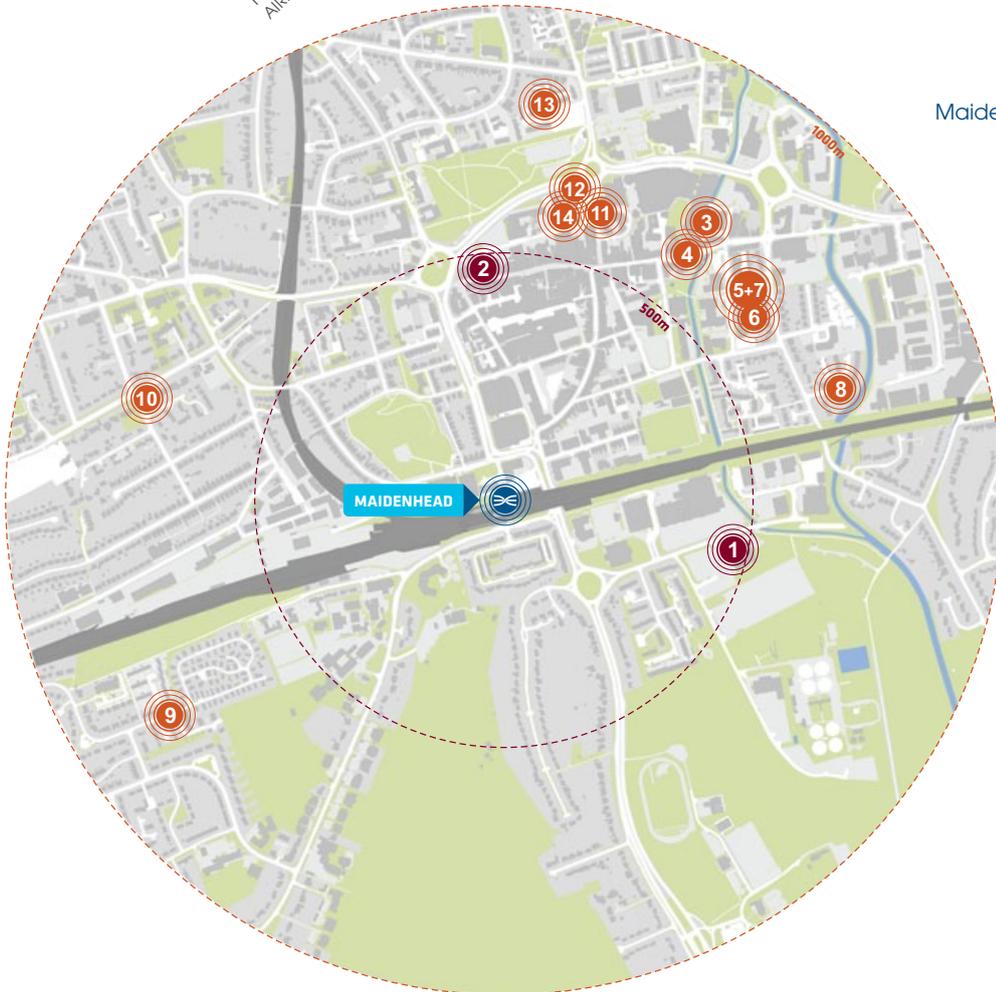
Data Sheet



Crossrail Context Map



Western Section

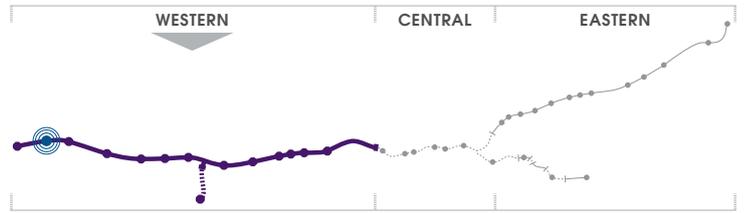


Maidenhead Station

	Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1	Former Site of Target (11/02687/FULL)	0	0	1,407	Full
2	Land Rear of 110-114 High Street (09/00727)	32	0	0	Full
3	Colonnade High Street (12/02762/OUT)	163	363	1,681	Outline
4	Copthall House (12/02771/FULL)	80	0	167	Full
5	3-6 Bridge Avenue (12/01569/OUT)	0	2,454	0	Outline
6	7, 8 & 9 Bridge Avenue (12/03419/FULL)	23	0	0	Full (Application)
7	3-6 Bridge Avenue (13/02004/OUT)	57	0	0	Outline
8	Cedars Park (12/01026/FULL)	33	0	0	Full
9	Brunel Centre (09/01565/FULL)	36	0	0	Full
10	East Berkshire College (11/02156/FULL)	66	0	0	Full
11	Point 27-29 Market Street (10/01666/FULL)	0	11,389	0	Full
12	Kidwells Park House (11/01420/FULL)	0	10,285	0	Full
13	Site at Kidwells Close (09/02305)	204	0	0	Full
14	Kidwells Park House (11/01420/FULL)	0	5,756	0	Full
	TOTALS	694	30,247	3,255	

Taplow

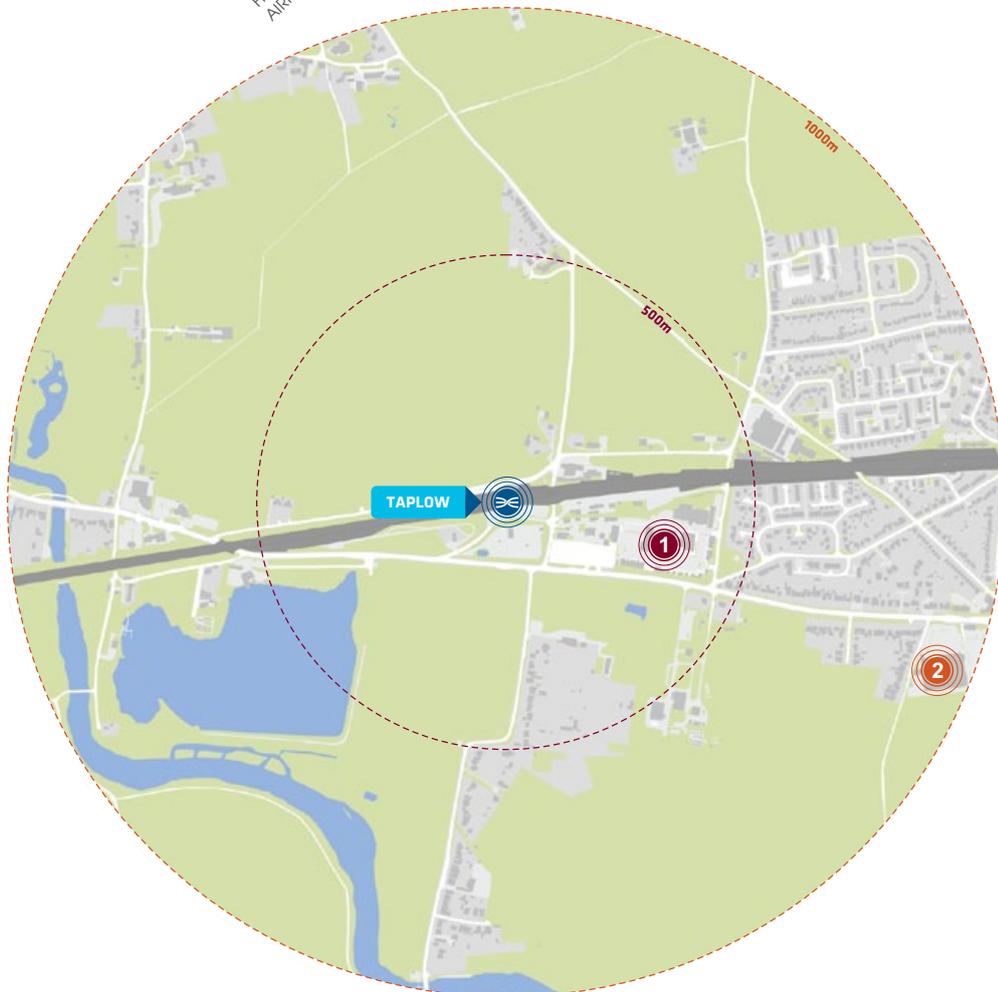
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Crossrail Context Map



Western Section

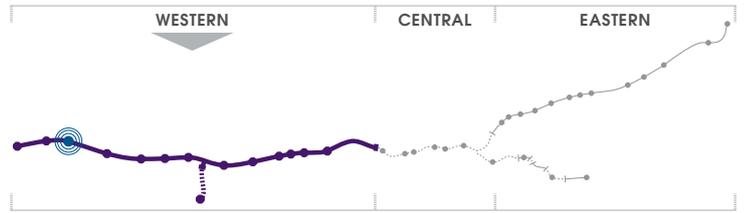


Taplow Station

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 Taplow Shopping Park (11/01625/FUL)	0	0	11,764	Full
2 Sainsbury's Supermarket (11/00662/FUL)	0	0	6,987	Full
TOTALS	0	0	18,751	

Burnham

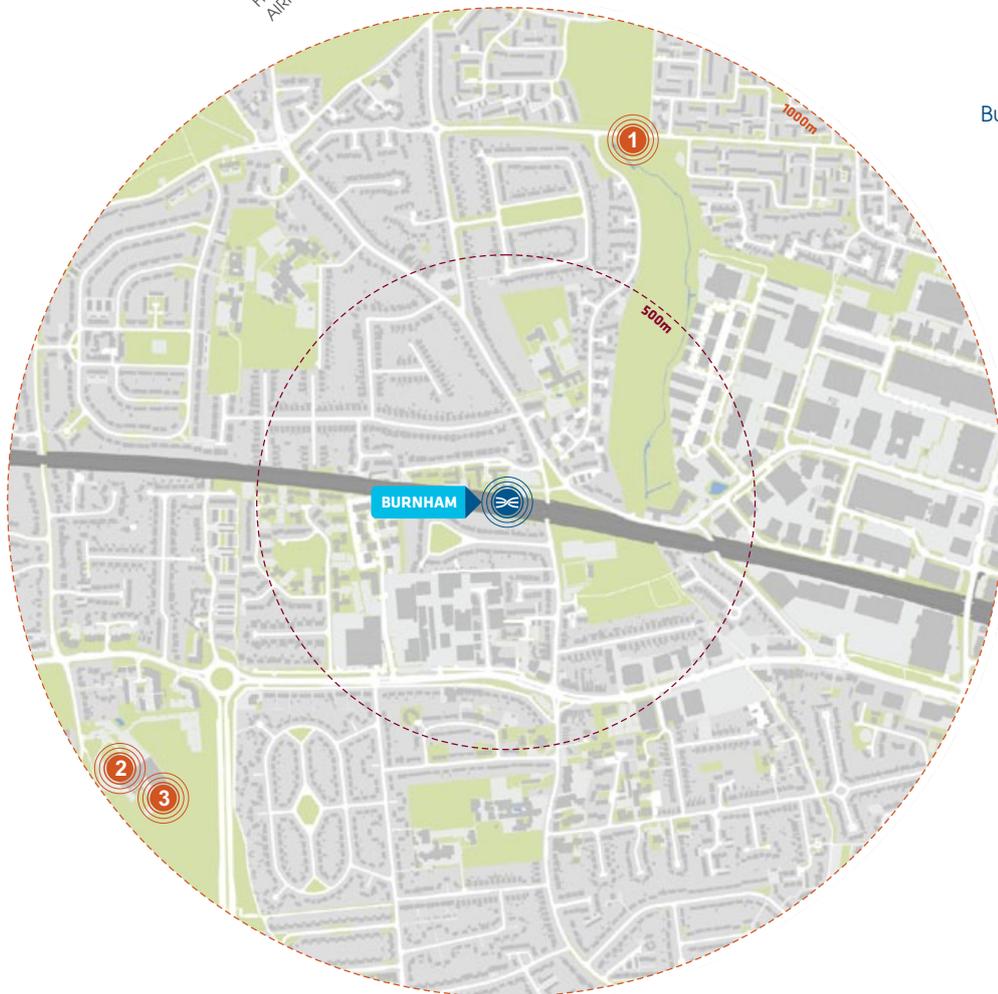
Data Sheet



Crossrail Context Map



Western Section

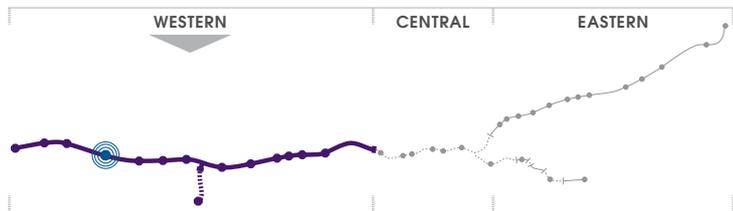


Burnham Station

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 Kennedy Park Recreation Ground (P/15513/000)	258	0	1,391	Full (Application)
2 Huntercombe Park (P/02441/010)	59	0	0	Full
3 Huntercombe Park (11/01119/FUL)	0	10,055	0	Full
TOTALS	307	10,055	1,391	

Slough

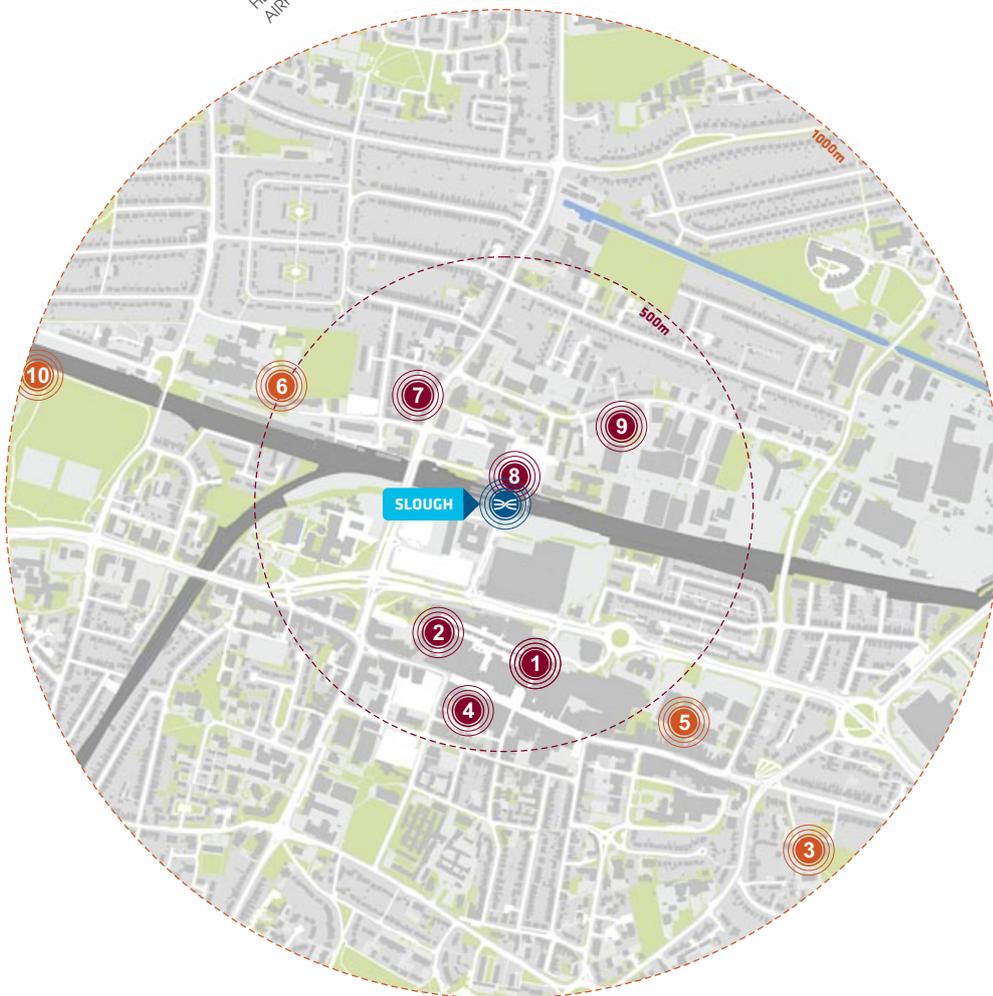
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Crossrail Context Map



Western Section

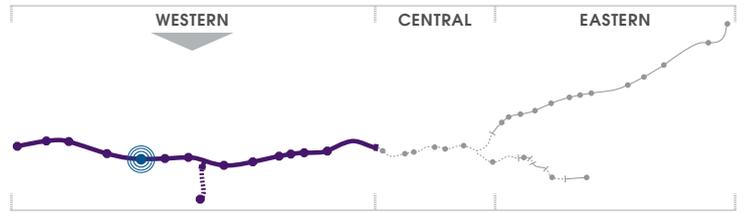


Slough Station

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 Wellington House (P/11826/005)	100	0	0	Full
2 Queensmere Shopping Centre (P/06684/015)	908	0	535	Full (Application)
3 Elvian House (P/04551/013)	51	0	0	Full (Application)
4 9-10 Chapel Street (P/01913/006) and (P/01913/008)	18	131	264	Outline
5 100 Wellington Street (P/06629/020)	0	2,041	0	Full
6 The Pavilion (P/01949/015)	56	0	0	Outline
7 Northgate House (P/00149/017)	120	0	0	Full (Application)
8 Intercity House (P/10406/007)	134	0	0	Full
9 Lion House (P/06348/008)	91	0	0	Full (Application)
10 392 Bath Road (P/00176/032)	0	0	2,665	Full (Application)
TOTALS	1,478	2,172	3,464	

Langley

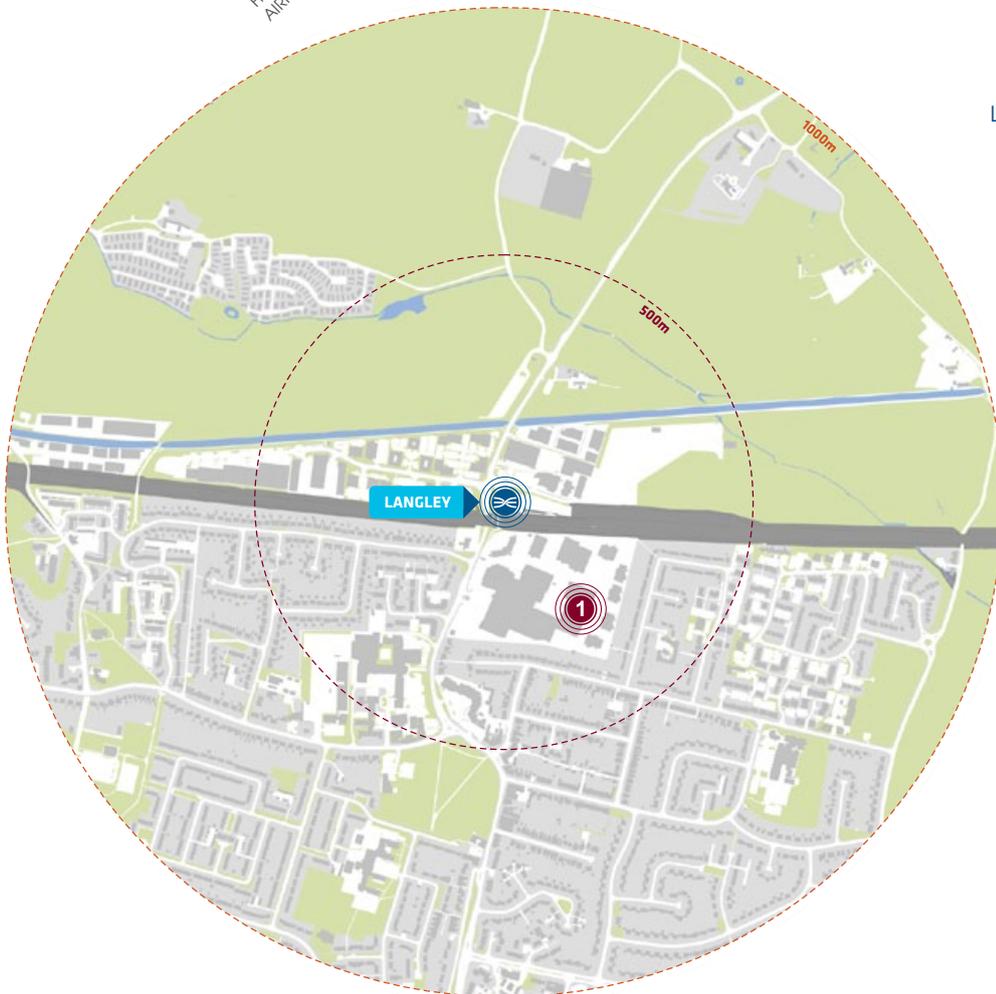
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Crossrail Context Map



Western Section

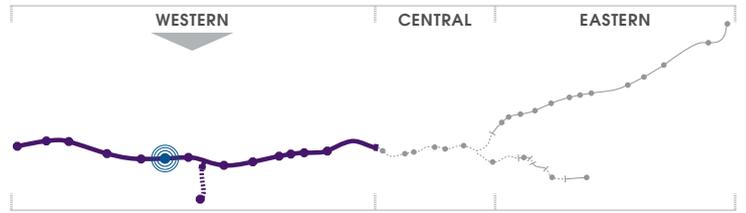


Langley Station

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 Langley Business Centre (P/00437/085)	0	0	4,567	Full (Application)
TOTALS	0	0	4,567	

Iver

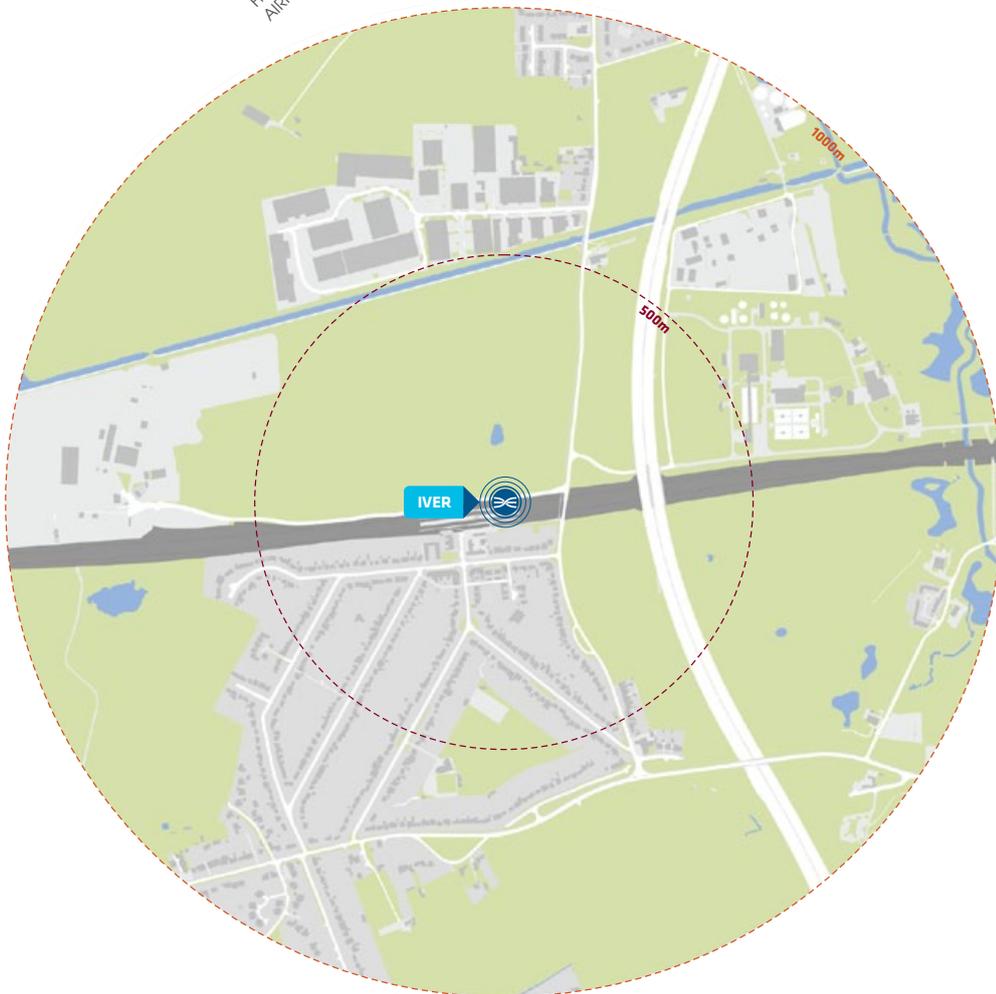
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Crossrail Context Map



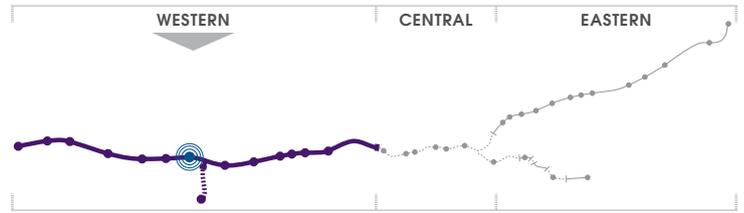
Western Section



Iver Station

West Drayton

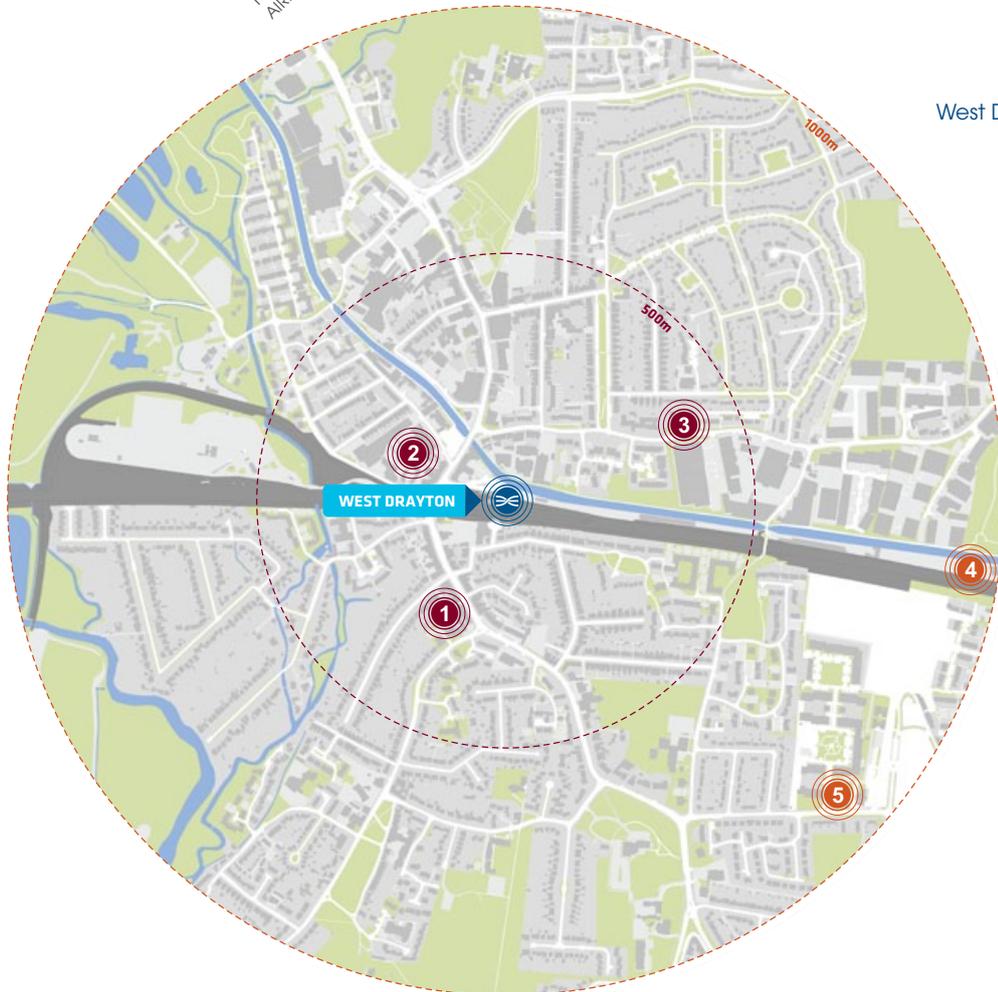
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Crossrail Context Map



Western Section

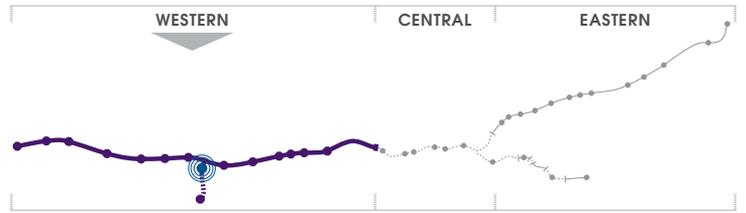


West Drayton Station

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 70 Station Road (2954/APP/2011/2723)	44	0	0	Full
2 Padcroft Works (45200/APP/2012/3082)	241	0	69	Full
3 Stockley Park Phase 3 (37800/APP/2013/161)	0	2,080	0	Full
4 Stockley Park (37977/APP/2009/2079)	0	2,733	1,167	Full
5 Drayton Garden Village - Fortis & Vista (5107/APP/2009/2348)	773	185	185	Full
TOTALS	1,058	4,998	1,421	

Heathrow Airport 1,2,3

Data Sheet



Crossrail Context Map



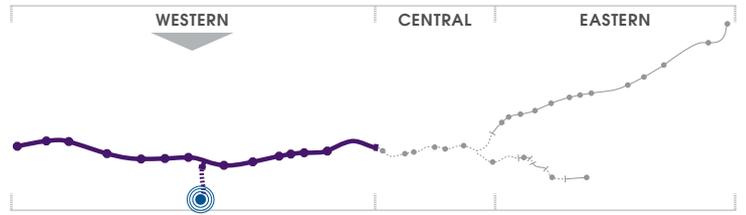
Western Section



Heathrow Airport 1,2,3 Station

Heathrow Airport 4

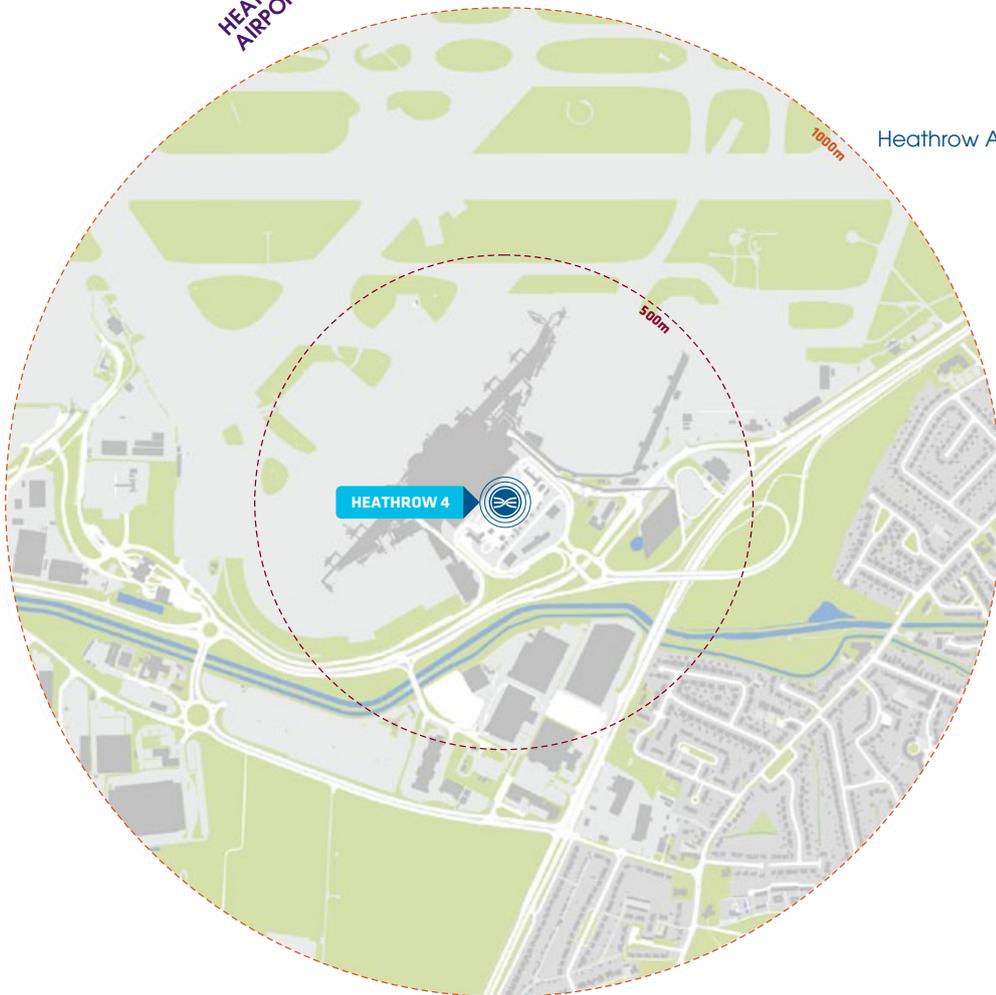
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Crossrail Context Map



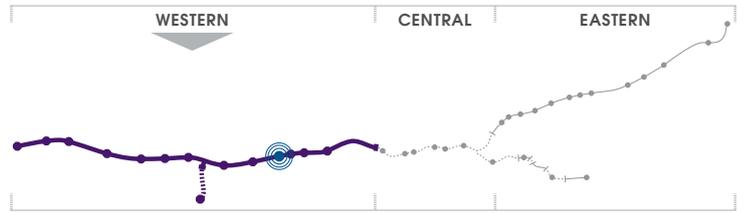
Western Section



Heathrow Airport 4 Station

Hanwell

Data Sheet



Crossrail Context Map



Western Section

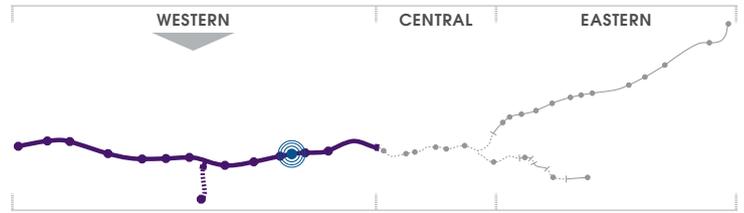


Hanwell Station

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 St Bernard's Hospital - Site 1 (P/2012/5040)	270	143	35	Full
2 St Bernard's Hospital - Sites 2 + 3 (PP/2012/4008)	306	0	0	Full
3 Manor Works (PP/2013/3073)	44	0	0	Full (Application)
4 Green Man Lane Estate Phase 2b (PP/2013/2509)	212	0	0	Full
5 Green Man Lane Estate Phase 1-4 Master Permission (P/2010/0419)	707	0	0	Full
6 4-14 Shakespeare Road (P/2012/0164)	22	0	0	Full
7 Manor House Court (P/2008/4509)	36	0	0	Full
8 Heath Lodge (P/2011/0539)	28	0	0	Full
TOTALS	1,625	143	35	

West Ealing

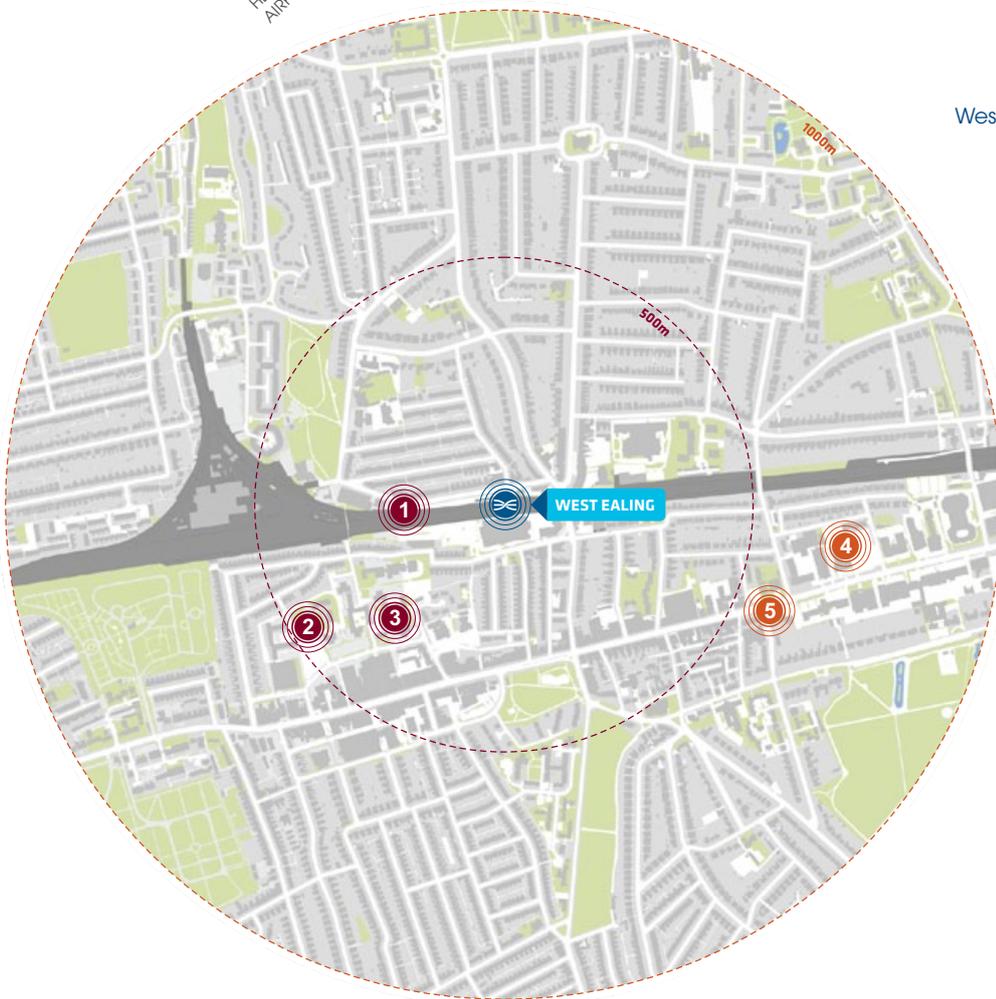
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Crossrail Context Map



Western Section

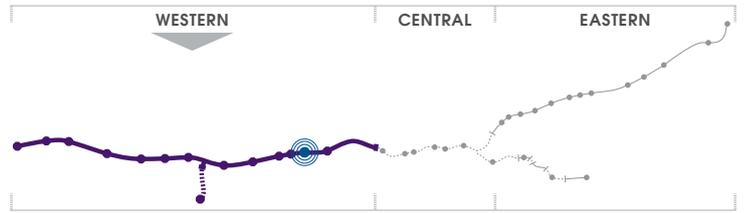


West Ealing Station

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 Manor Works (PP/2013/3073)	44	0	0	Full (Application)
2 Green Man Lane Estate Phase 2b (PP/2013/2509)	212	0	0	Full (Application)
3 Green Man Lane Estate Phases 1-4 Master Plan (P/2010/0419)	706	0	0	Outline
4 The Apex (Westel House) (PP/2010/4585)	131	0	0	Full
5 113 Uxbridge Road (PP/2012/0743)	0	2,830	0	Full
TOTALS	1,093	2,830	0	

Ealing Broadway

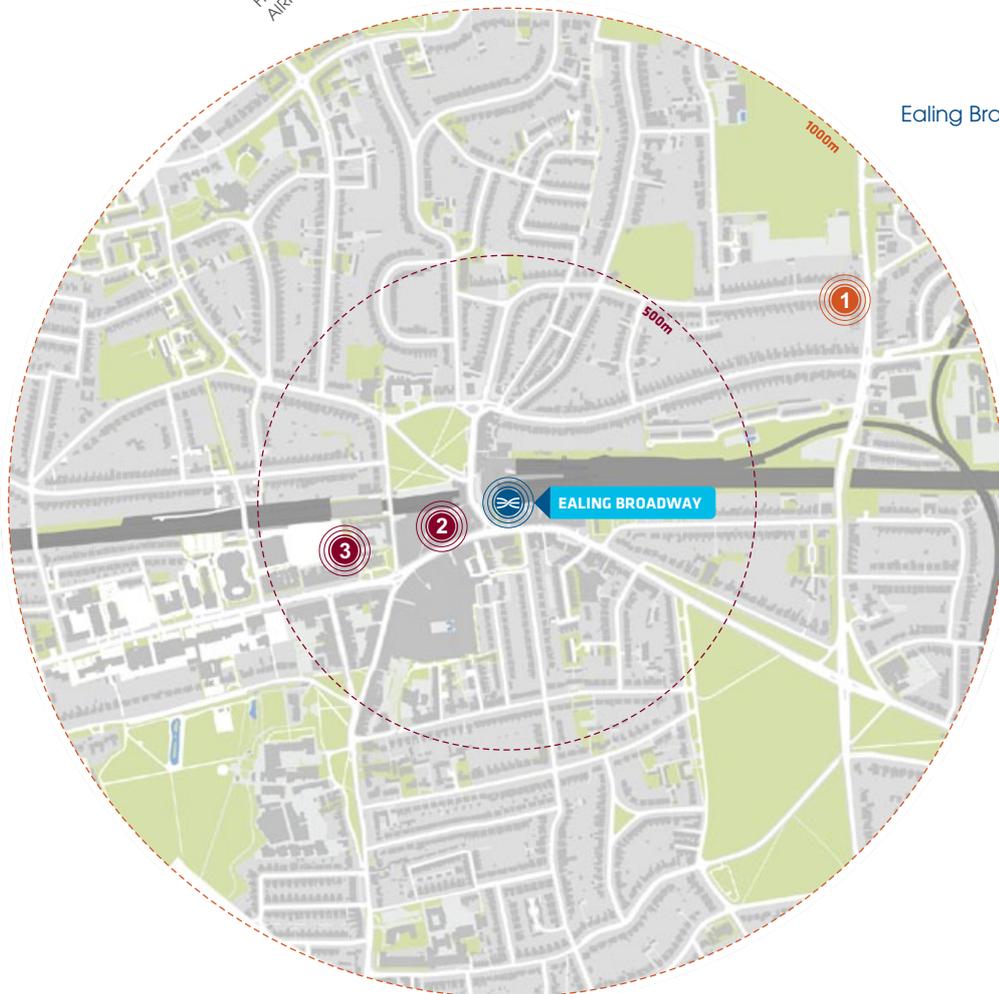
Data Sheet



Crossrail Context Map



Western Section

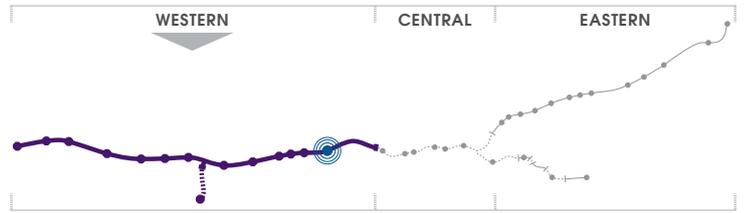


Ealing Broadway Station

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 81-85 Madely Road (P/2011/1041)	50	0	0	Full
2 The Arcadia Centre (P/2013/1127)	0	0	8,819	Full
3 Dickens Yard (P/2012/2397)	0	0	1,032	Full
TOTALS	50	0	9,851	

Acton Main Line

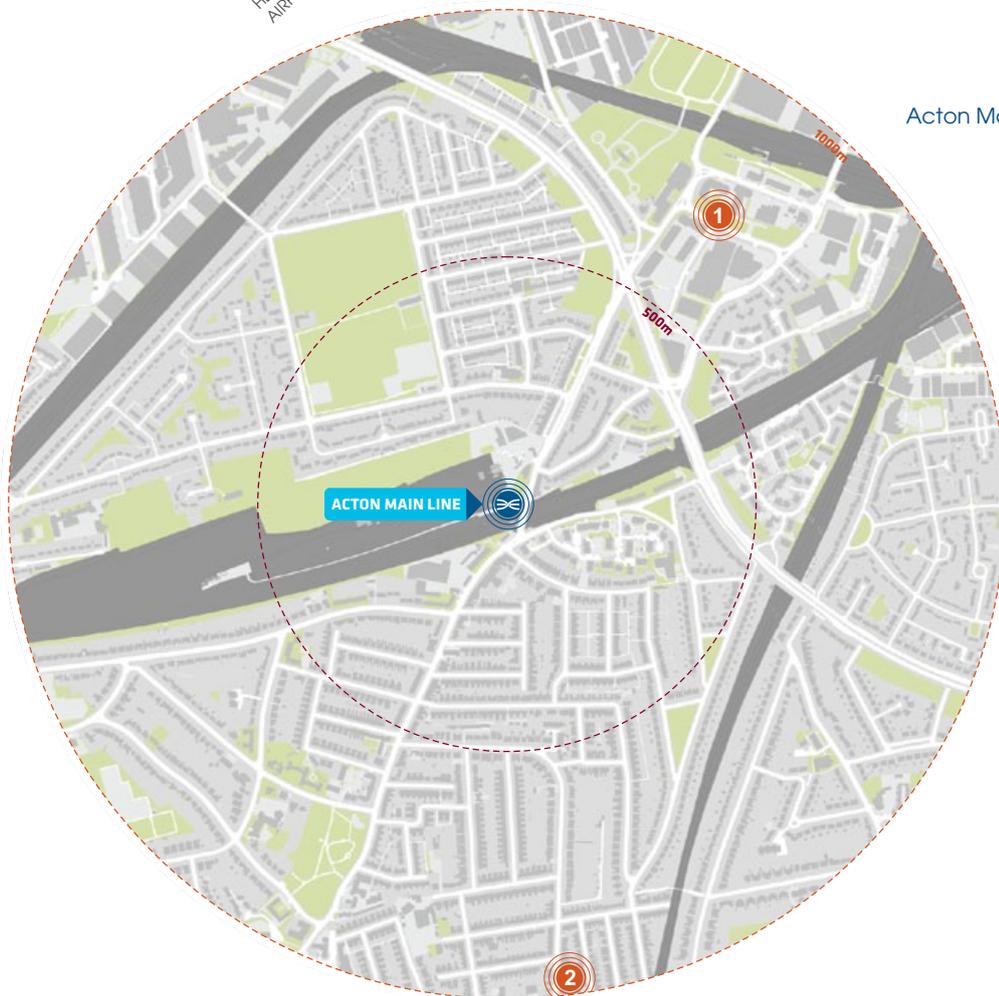
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Crossrail Context Map

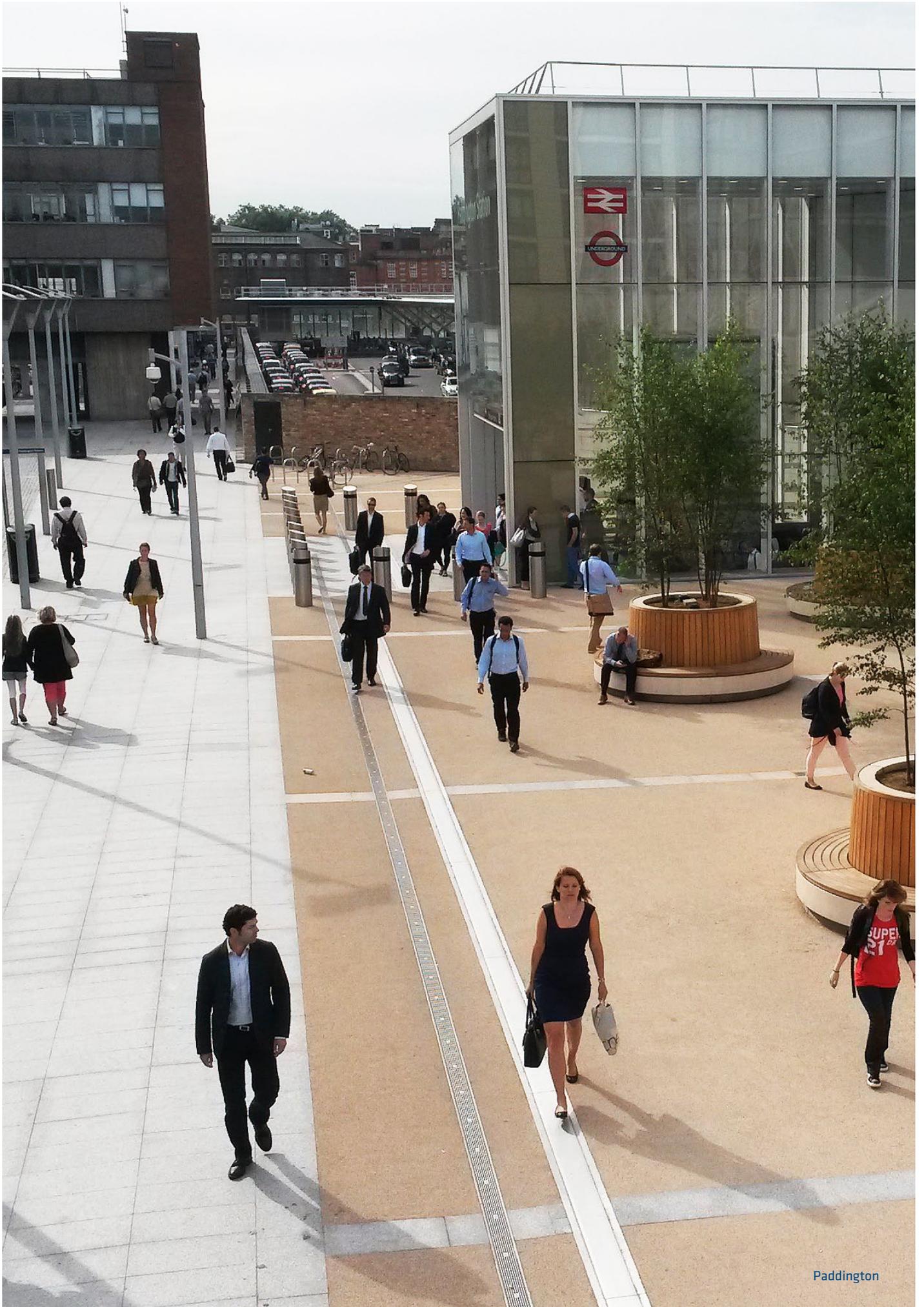


Western Section



Acton Main Line Station

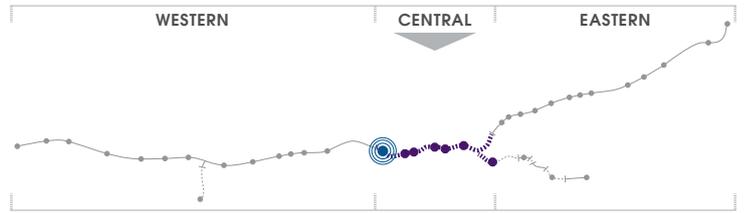
Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 Corner Plot (PP/2011/4250)	151	0	0	Outline
2 Park House (Acton Central Industrial Estate) (P/2009/2975)	45	0	0	Full
TOTALS	196	0	0	



Paddington

Paddington

Data Sheet



Crossrail Context Map



Central Section

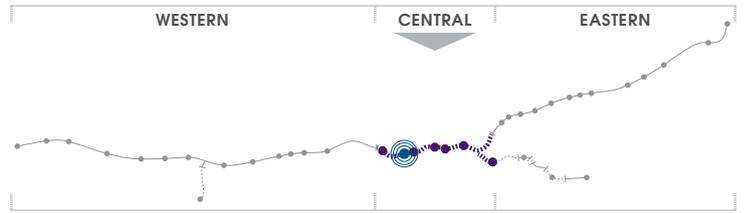


Paddington Station

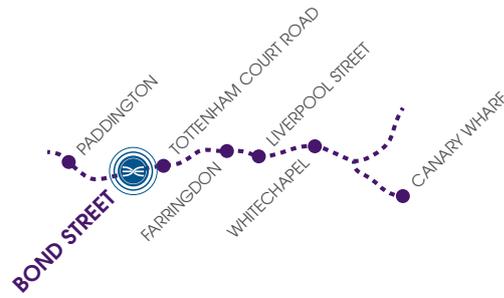
Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 Royal Mail - Paddington Sorting & Delivery (11/04623/FULL)	141	10,827	1,007	Full
2 Tournament House (11/03204/FULL)	0	3,015	0	Full
3 Merchant Square 3 (10/09758/FULL)	201	0	0	Full
4 Merchant Square 6 (F) (11/10445/FULL)	119	0	583	Full
5 Paddington Basin Merchant Square 2- Topaz (10/09757/FULL)	0	20,775	396	Full
6 Merchant Square 1 (A) The Cucumber (10/09756/FULL)	222	0	0	Full
7 Dudley House (11/06435/COFUL)	93	454	0	Full
8 North Wharf Gardens - Master Permission (10/10215/COFUL)	434	12,933	2,029	Full
9 North Wharf Gardens Phase 1 (12/11911/FULL)	150	1278	586	Full
10 Paddington Station - Triangle Site Praed Street (12/07668/FULL)	0	32,730	132	Full (Application)
11 Meritas Court (09/05355/FULL)	22	720	0	Full
12 Westbourne House (13/00203/FULL)	20	0	82	Full
13 Land at Inverness Terrace (09/05653/FULL)	20	0	1,304	Full
14 Elliot House (12/06397/FULL)	31	0	0	Full
15 112 - 130 Edgware Road (11/12188/FULL)	24	5,591	520	Full
TOTALS	1,477	88,323	6,639	

Bond Street

Data Sheet



Crossrail Context Map



Central Section

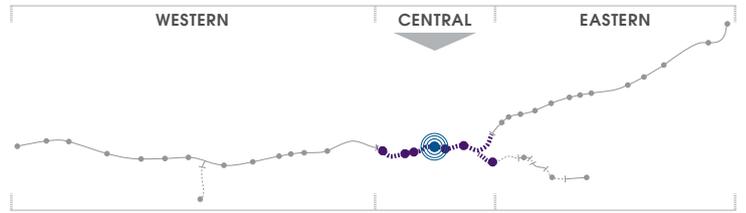


Bond Street Station

	Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1	261-271 Regent Street (11/09181/FULL)	0	0	2,088	Full
2	Marcol House (10/03455/FULL)	23	566	0	Full
3	22-25 Kingly Street (11/06279/FULL)L	0	844	1,246	Full
4	1 Welbeck Street (12/11693/FULL)	0	7,397	0	Full
5	The Wimpole Building (11/03388/FULL)	0	6,823	0	Full
6	Macintosh House	24	0	0	Full
7	30 Berkeley Square (13/04468/FULL)	0	3,530	0	Full (Application)
8	Reed House (13/04041/FULL)	48	8,649	0	Full (Application)
9	56 Curzon Street (12/11740/FULL)	25	0	0	Full
10	Audley Square House (12/08019/FULL)	24	0	0	Full
11	65 Davies Street (13/00369/FULL)	0	9,582	0	Full (Application)
12	20 Grosvenor Square (11/04493/FULL)	31	0	0	Full
13	111-112 New Bond Street (11/01320/FULL)	0	0	4,109	Full
14	7-10 Hanover Square (12/10397/FULL)	21	8,302	989	Full
15	11-12 Hanover Square (12/12408/FULL)	0	4,929	1,451	Full
16	3 Tenterden Street (10/10812/FULL)	0	423	1,459	Full
17	31-33 Maddox Street (11/02872/FULL)	0	1,488	110	Full
18	The Orangery (13/03714/FULL)	0	1,352	732	Full (Application)
19	30 Old Burlington Street (13/01715/FULL)	42	0	2,168	Full
20	5 Cork Street (12/10803/FULL)	0	5,746	1,998	Full (Application)
21	54-76 Marylebone Lane (13/02105/FULL)	14	7,195	744	Full
22	35 Marlyebone High Street (12/07084/FULL)	24	0	480	Full (Application)
23	International House (13/00788/FULL)	56	0	496	Full
24	Chiltern Street Car Park (12/09397/FULL)	60	0	0	Full
25	18-19 Hanover Square (11/01182/FULL)	0	21,600	0	Full
	TOTALS	392	88,426	18,070	

Farringdon

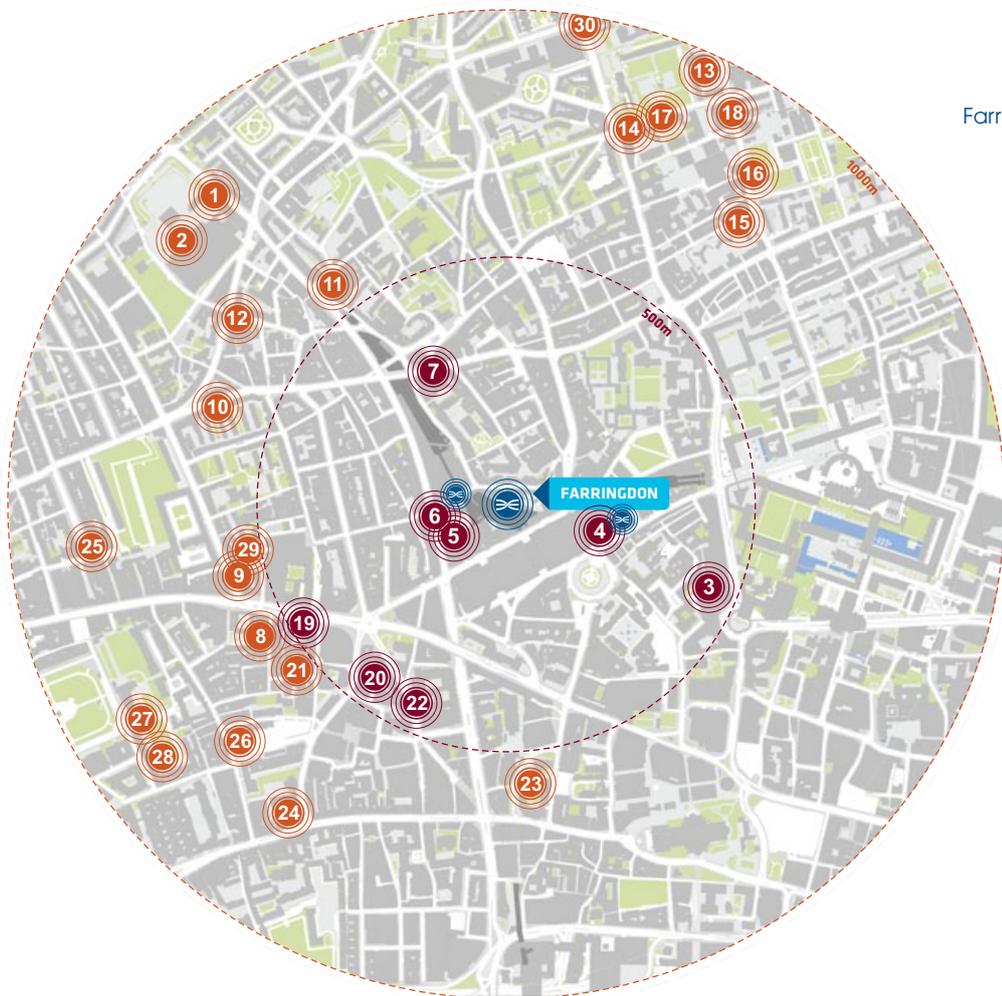
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Crossrail Context Map



Central Section

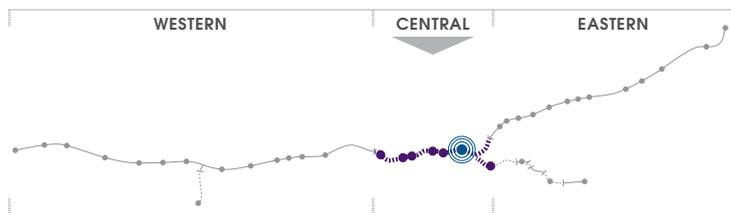


Farringdon Station

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 Mount Pleasant Royal Mail - Camden - Phoenix Place (2013/3807/P)	345	0	0	Full (Application)
2 Mount Pleasant Royal Mail - Islington - Calthorpe Street (P2013/1423/FUL)	336	4,260	0	Full (Application)
3 St Barts Square (12/00256/FULEIA)	216	30,811	2,212	Full
4 Land Bound By Charterhouse Street (13/00605/FULEIA)	0	10,787	280	Full (Application)
5 Farringdon Overstation Dev Site (Cardinal House) (P121162)	0	15,453	3,377	Full
6 Caxton House (P120484)	0	17,466	1,050	Full
7 The Turnmill (P110392)	0	6,834	2,834	Full
8 1-6 Dyer's Buildings (11/00885/FULMAJ)	35	0	0	Full
9 150 Holbourn (2011/4198/P)	6	11,384	2,889	Full
10 Bourne Estate South (2012/6372/P)	75	0	0	Full
11 38 Northampton Road (P121972)	0	2,248	0	Full
12 Sandra House (2012/5362/P)	0	1,027	0	Full
13 City Forum (P2013/0031/FUL)	975	5,000	3,650	Full
14 Telfer House (P2013/2437/FUL)	38	0	0	Full (Application)
15 43-57 Gee Street (P092680)	6	2,240	0	Full
16 St Lukes Centre (P122284)	50	155	0	Full
17 Clerkenwell Quarter / Worcester Point (City Central Estate) (P112417)	161	0	0	Full
18 Former Moorfields Primary School (P112564)	65	0	0	Full
19 The Printer's Devil Public (10/00936/FULMAJ)	0	7,729	149	Full
20 76 Shoe Lane (11/00210/FULMAJ)	0	29,042	521	Full
21 98-99 Fetter Lane (13/00771/FULMAJ)	0	7,358	109	Full (Application)
22 Plumtree Court (10/00577/FULMAJ)	0	39,660	0	Full
23 New Ludgate (11/00049/FULEIA)	0	55,661	2,791	Full
24 St Dunstan's Court (St Dunstan's House) (10/00569/FULMAJ)	76	0	0	Full
25 Brownlow / High Holborn / Caroline House (2012/3541/P)	28	21,653	790	Full
26 Lonsdale Chambers (11/00426/FULMAJ)	0	5,656	668	Full
27 New Court (12/07686/FULL)	25	19,890	579	Full
28 New Court (12/07684/FULL)	148	0	0	Full
29 Fox Court (2013/0786/P)	0	12,346	1,661	Full
30 Crown House (2012/3259)	302	10,625	943	Full
TOTALS	2,887	317,285	24,503	

Whitechapel

Data Sheet



Crossrail Context Map



Central Section

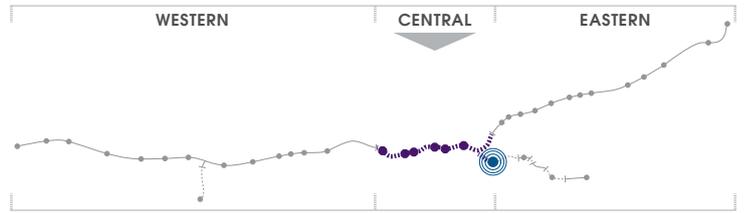


Whitechapel Station

	Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1	191-195 Whitechapel Road (PA/12/02582)	45	0	791	Full (Application)
2	Land adjacent railway viaduct (PA/12/01758)	93	0	0	Full
3	One Fifty Mile End Road (Fulneck) (PA/10/00925)	78	0	0	Full
4	22-28 Underwood Road (PA/12/00771)	33	0	0	Full
5	6-8 Hemming Street (PA/13/01813)	34	1,434	0	Full (Application)
6	Goodman's Fields (PA/11/03587)	864	0	0	Outline
7	Aldgate Union / Adgate Place (PA/13/00218)	463	2,330	1,307	Full
8	Altitude Aldgate (PA/10/01096)	235	0	0	Full
9	Block C - Old Trumans Brewery (PA/10/01153)	0	7,889	0	Full
10	58-64 Three Colts Lane (PA/11/03785)	149	0	0	Full
11	The Colt (Greenhealth Business Centre) (PA/11/00829)	67	0	0	Full
	TOTALS	2,061	11,653	2,098	

Canary Wharf

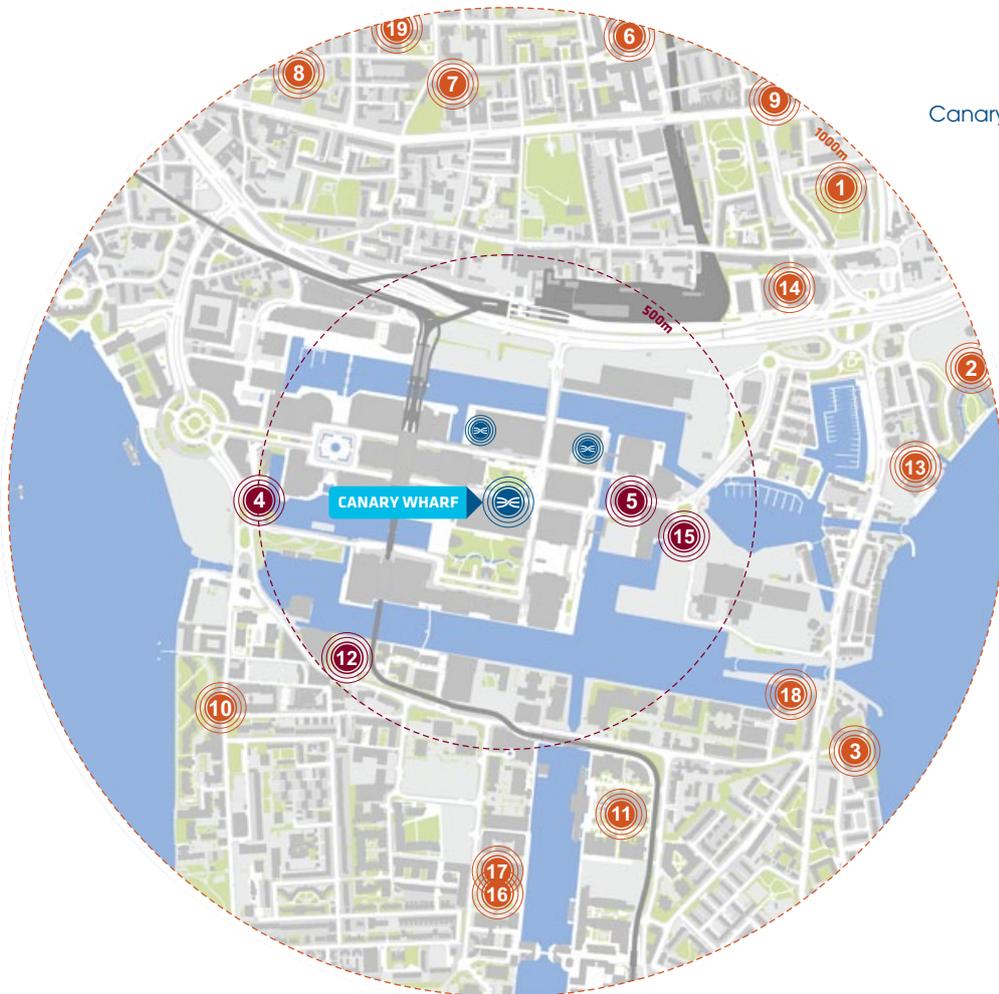
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Crossrail Context Map

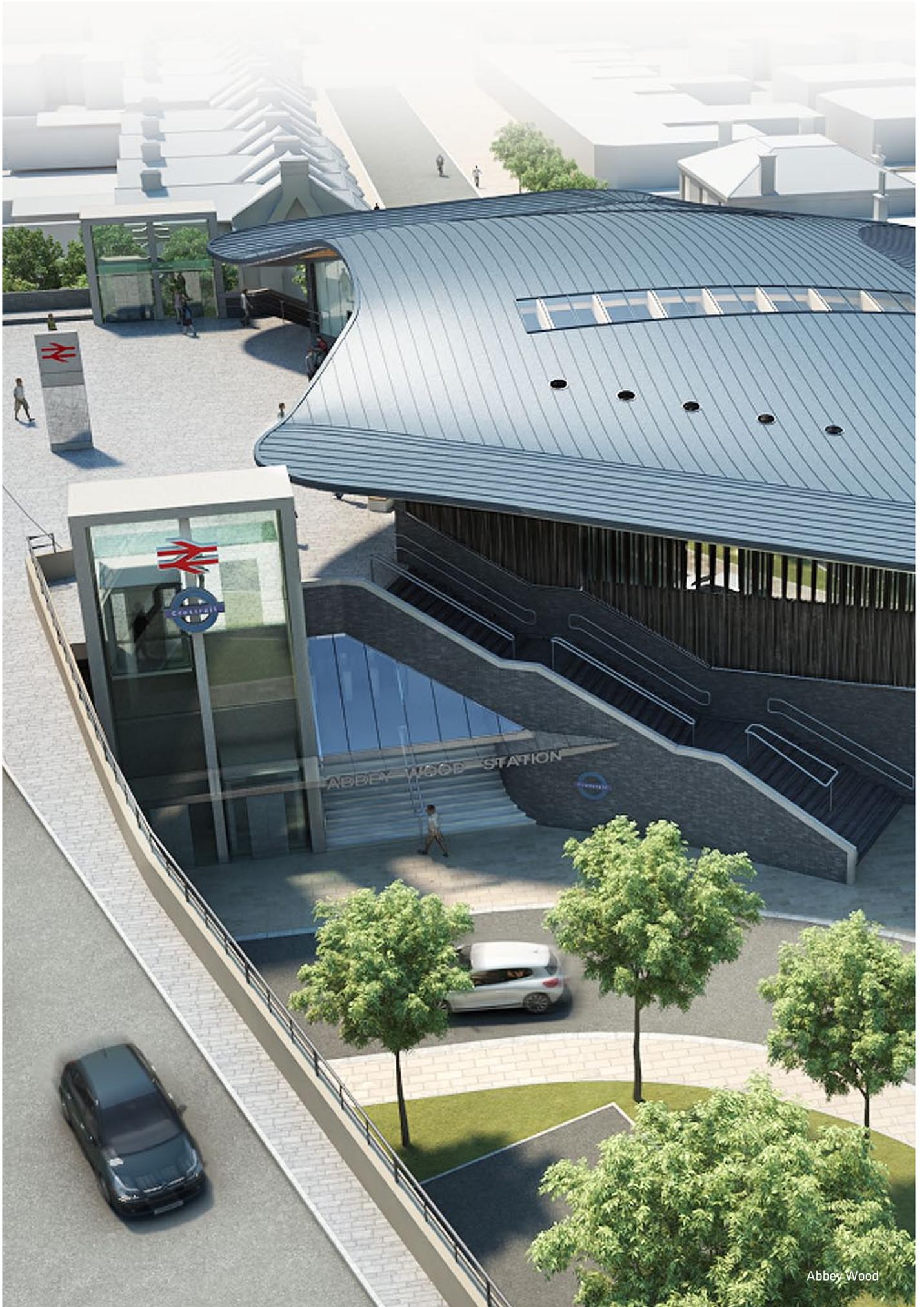


Central Section



Canary Wharf Station

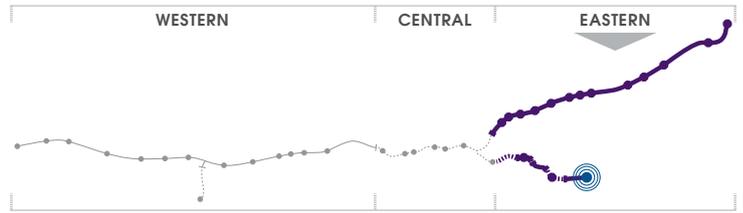
Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 Blackwell Reach (Robin Hodd Gardesn Estate) (PA/12/00001) (P/15513/000)	1,575	0	0	Full
2 City Island (Former Pura Site) (PA/10/01864)	1,706	7,433	1,759	Full
3 New Union Wharf (PA/12/00360)	399	0	0	Full
4 Park Place (Heron Quay Sections I/II (PA/13/01455)	566	0	1,537	Full
5 25 Churchill Place (PA/10/00332)	0	71,169	0	Full
6 Equinox Phase 1 (PA/09/02657)	117	0	0	Full
7 Shepherd House (PA/09/00483)	30	0	0	Full
8 New Festival Quarter (Blessed John Roche School) (PA/11/03765)	502	0	0	Full
9 The Panoramic (PA/09/02100)	144	0	0	Full
10 Cuba Street Site (PA/11/01299)	439	488	554	Full (Application)
11 Exchange Tower (PA/13/01675)	0	3,456	0	Full
12 Arrowhead Quay (Waterside House) (PA/12/03315)	792	0	701	Full (Application)
13 Horizons (Gallions Quay/Prestons Road) (PA/12/02107)	190	0	0	Full
14 Poplar Business Park (PA/11/03375)	392	8,104	0	Full (Application)
15 Wood Wharf - Master Permission (PA/11/02174) and (PA/08/01215)	1,668	453,444	19,488	Full
16 45 Millharbour (PA/11/00798)	132	439	0	Full
17 Glengall Bridge North (1-3 Muirfield Crescent) (PA/10/01177)	143	0	0	Outline
18 Dollar Bay Court (PA/11/01945)	121	0	0	Full
19 St Saviours Church (PA/13/01590)	27	0	0	Full (Application)
TOTALS	8,943	544,533	24,039	



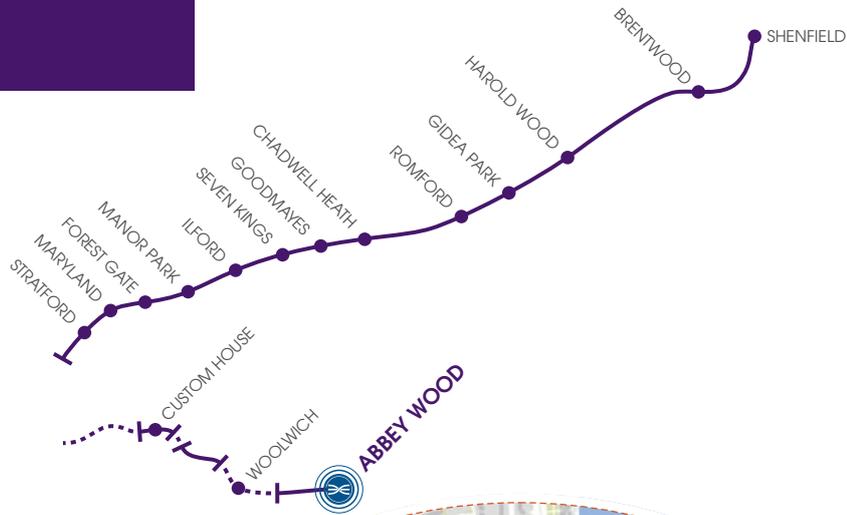
Abbey Wood

Abbey Wood

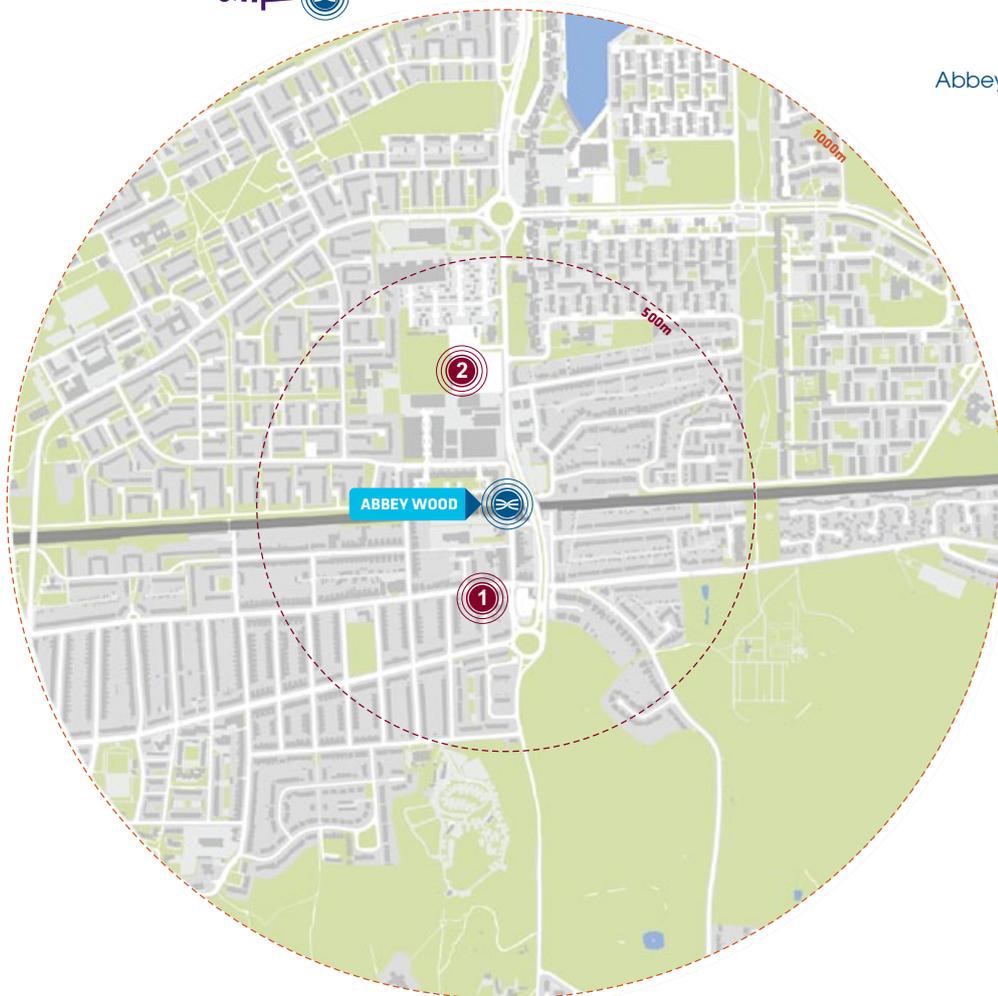
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Crossrail Context Map



Eastern Section

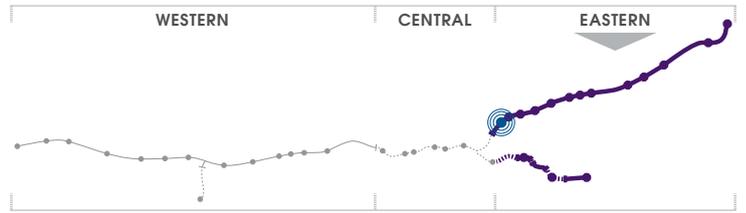


Abbey Wood Station

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 Post Office (13/1562/F)	28	0	491	Full (Application)
2 Gallions HA Offices (12/3058/F)	216	426	8,451	Full
TOTALS	244	426	8,942	

Stratford

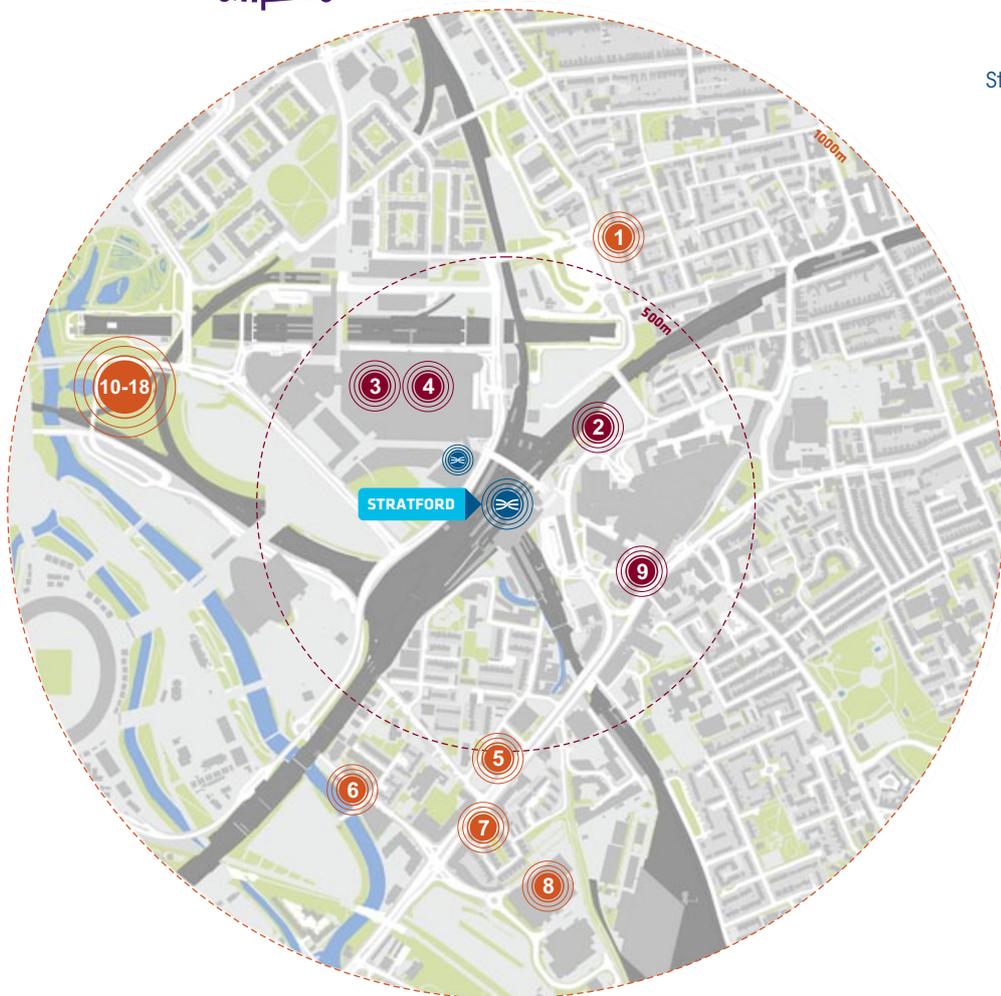
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Crossrail Context Map



Eastern Section

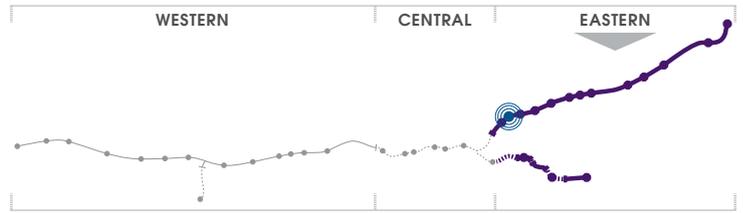


Stratford Station

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 East of Olympic Park - Zones 1-5 - Chobham Farm (LLDC: 12/00146/FUM)	1,100	0	0	Full (Application)
2 Stratford City - Zone 1 - North Western Side of Great Eastern Road (LLDC: 13/00322/FU)	181	0	0	Full (Application)
3 Stratford City - Zone 1 - Master Consent (LLDC: 10/90061/OUTODA)	1,224	3,158	0	Outline
4 Stratford City - Zones 1-7 Master Permission (10/90641/EXTODA)	6,454	0	0	Outline
5 206-214 High Street (09/01746/LTGDC)	147	0	0	Full
6 Wingate House (12/00498/LTGDC)	48	0	0	Full
7 Aurora (09/00361)	173	0	0	Full
8 Stratford Halo (Spirit of Stratford / Warton House) (09/01507)	639	0	0	Full
9 Broadway Chambers (Central House) (09/01612/LTGDC)	342	1,316	1,079	Full
10 Stratford City Zone 3 - Manhattan Loft Gardens (N24) (10/90285/FUMODA)	248	0	300	Full
11 Athletes' / East Village - N26 (09/90065/REMODA)	243	0	454	Full
12 Queen Elizabeth Olympic Park - Master Consent (11/90621/OUTODA)	6,780	30,369	25,987	Full
13 Athlete's / East Village - N03 (09/90084/REMODA)	297	0	663	Full (Details/ Reserved Matters)
14 Athlete's / East Village - N04 (09/90083/REMODA)	290	0	663	Full (Details/ Reserved Matters)
15 Athletes' / East Village - N07 (09/90082/REMODA)	318	0	522	Full (Details/ Reserved Matters)
16 Athlete's / East Village - N10 (09/90176/REMODA)	281	520	364	Full (Details/ Reserved Matters)
17 Athlete's / East Village - N13 (09/90076/REMODA)	185	0	0	Full (Details/ Reserved Matters)
18 Athlete's / East Village - N14 (10/90242/REMODA)	201	0	0	Full (Details/ Reserved Matters)
TOTALS	19,151	35,363	30,032	

Maryland

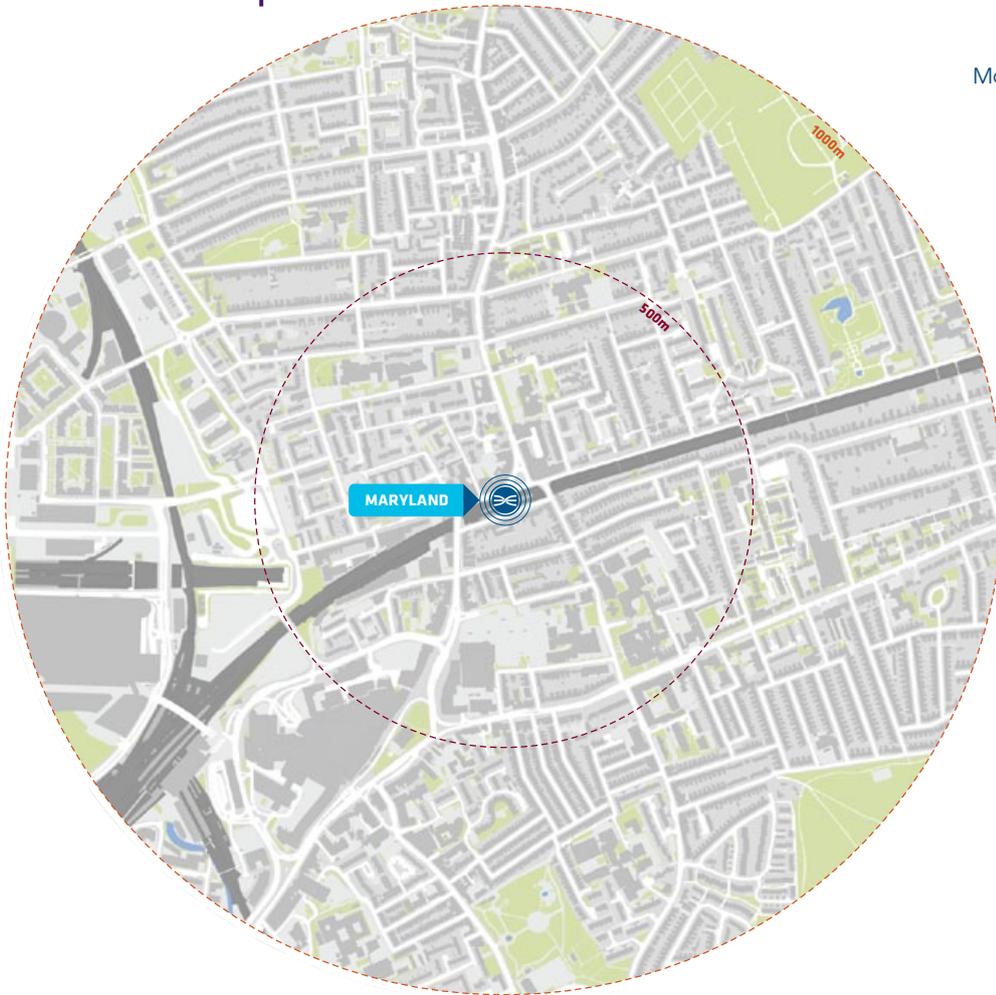
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Crossrail Context Map



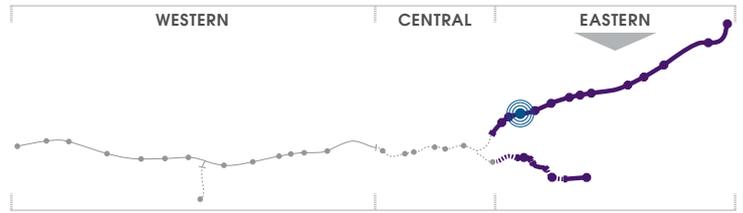
Eastern Section



Maryland Station

Forest Gate

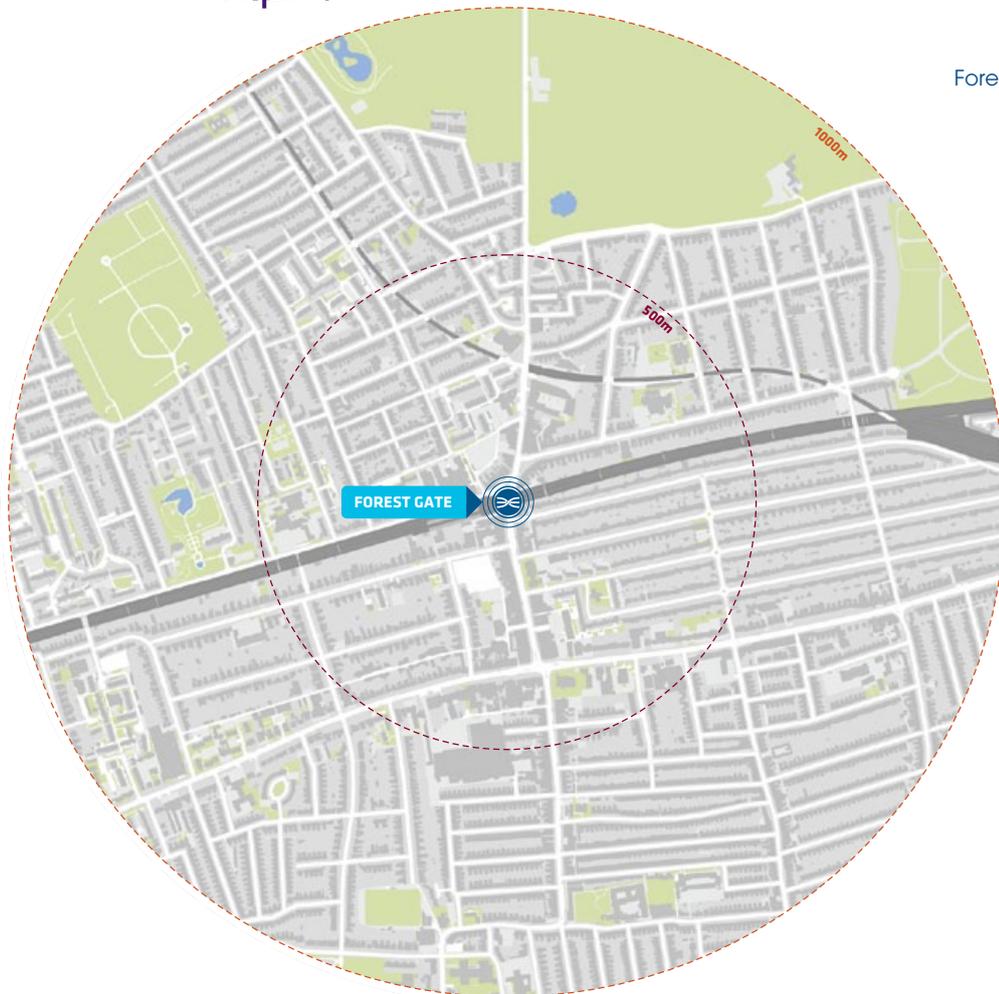
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Crossrail Context Map



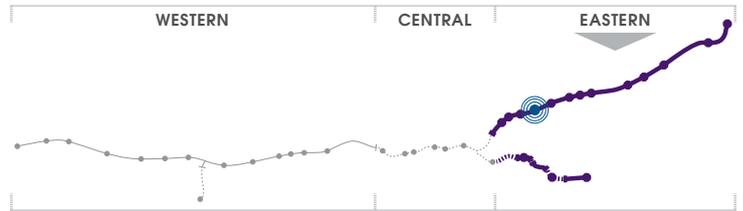
Eastern Section



Forest Gate Station

Manor Park

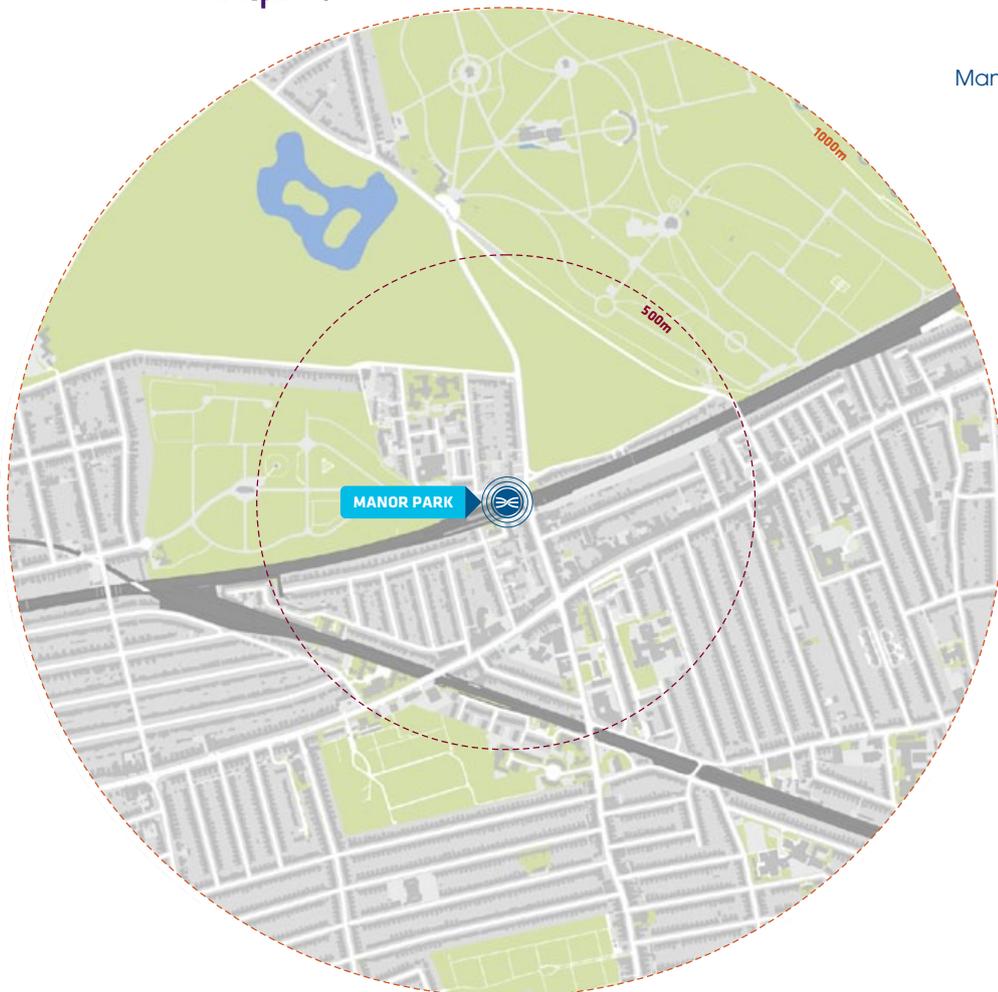
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Crossrail Context Map



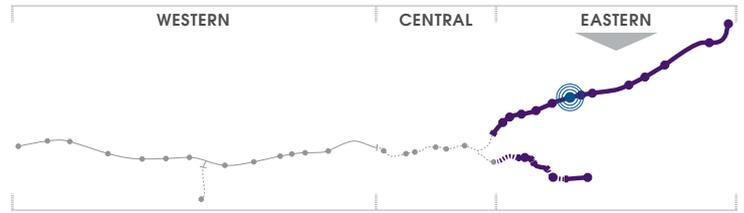
Eastern Section



Manor Park Station

Seven Kings

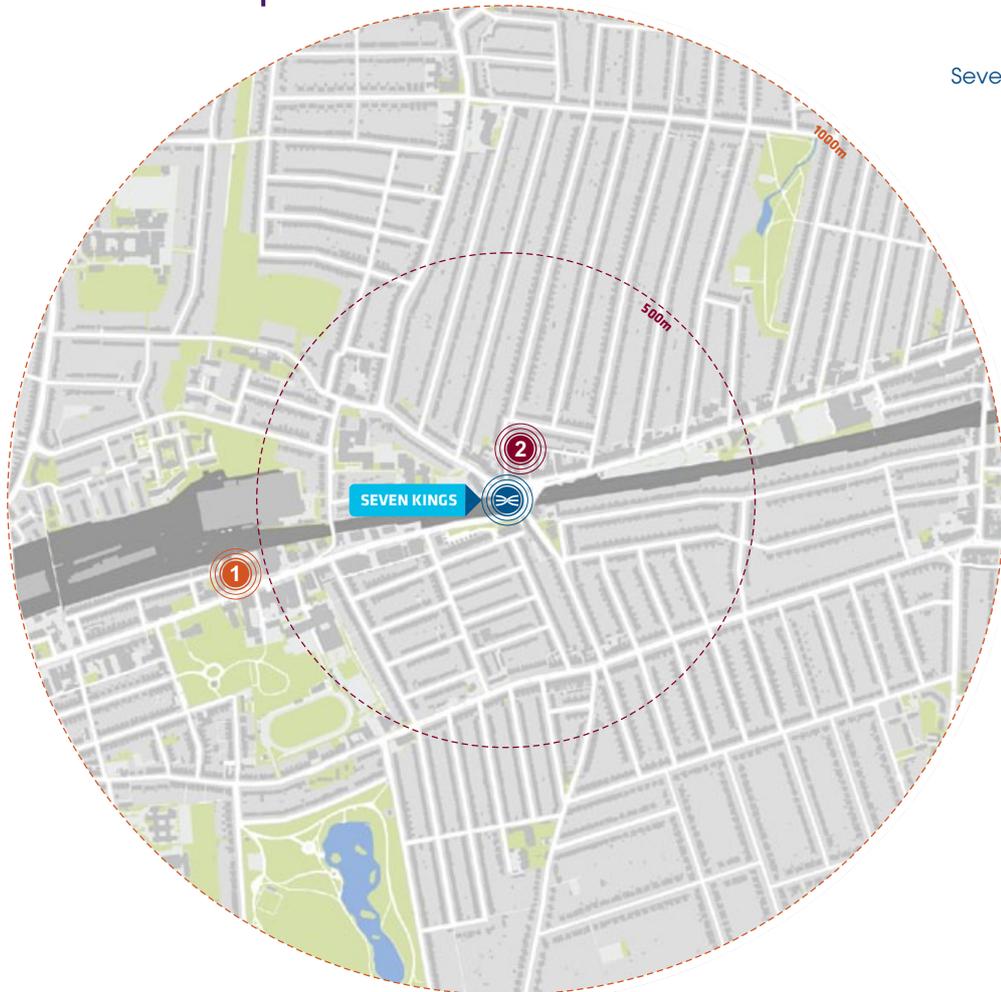
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Crossrail Context Map



Eastern Section

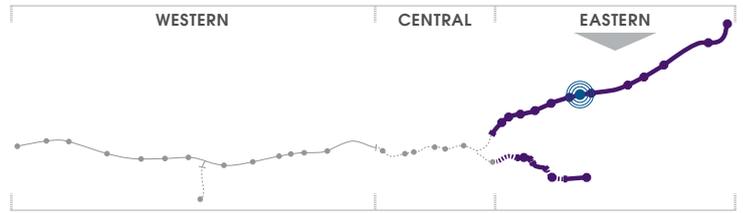


Seven Kings Station

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 K501-535 High Road (2483/10)	105	0	0	Full
2 The Shannon Centre (0951/13)	38	0	0	Full (Application)
TOTALS	143	0	0	

Goodmayes

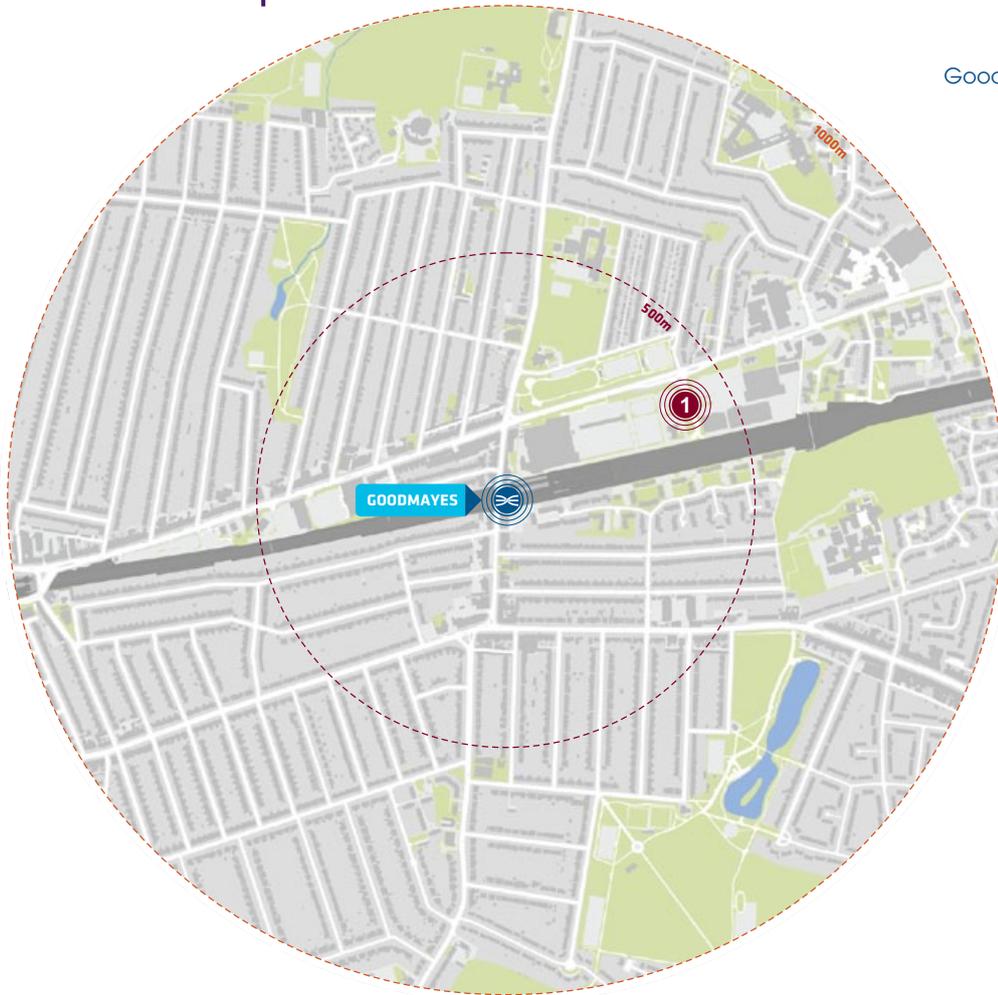
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Crossrail Context Map



Eastern Section

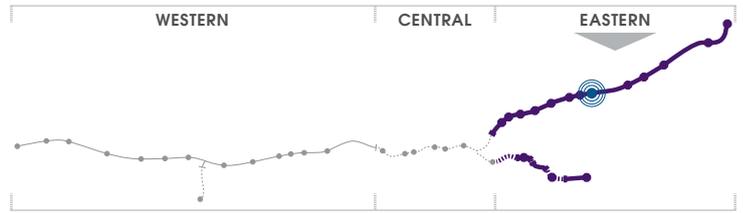


Goodmayes Station

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 Goodmayes Retail Park (0177/11)	0	0	4,902	Full
TOTALS	0	0	4,902	

Chadwell Heath

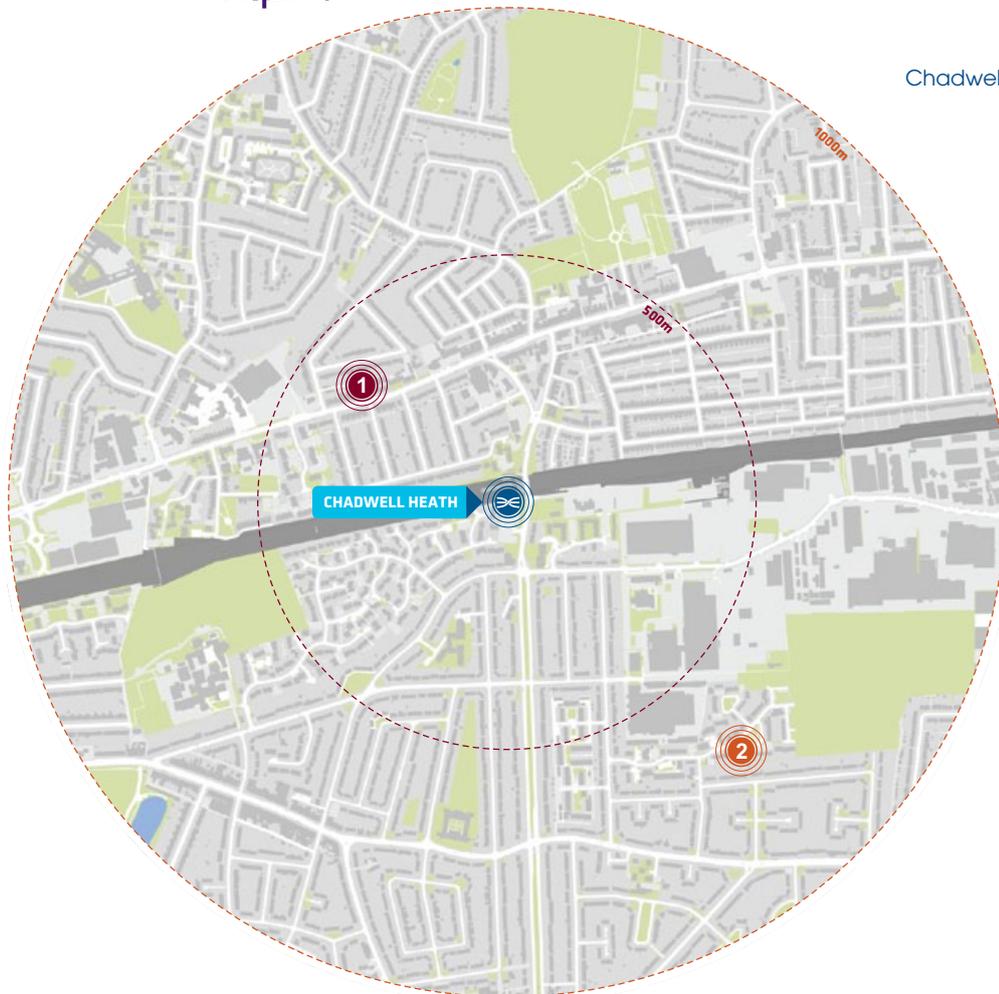
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Crossrail Context Map



Eastern Section

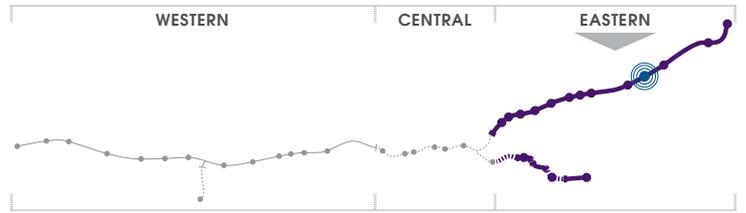


Chadwell Heath Station

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 The Collection (Chadwell Heath Business Park) (0034/09)	104	1,574	100	Full
2 Lymington Place- Master Permission (12/00170/FUL)	602	0	0	Outline
TOTALS	706	1,574	100	

Gidea Park

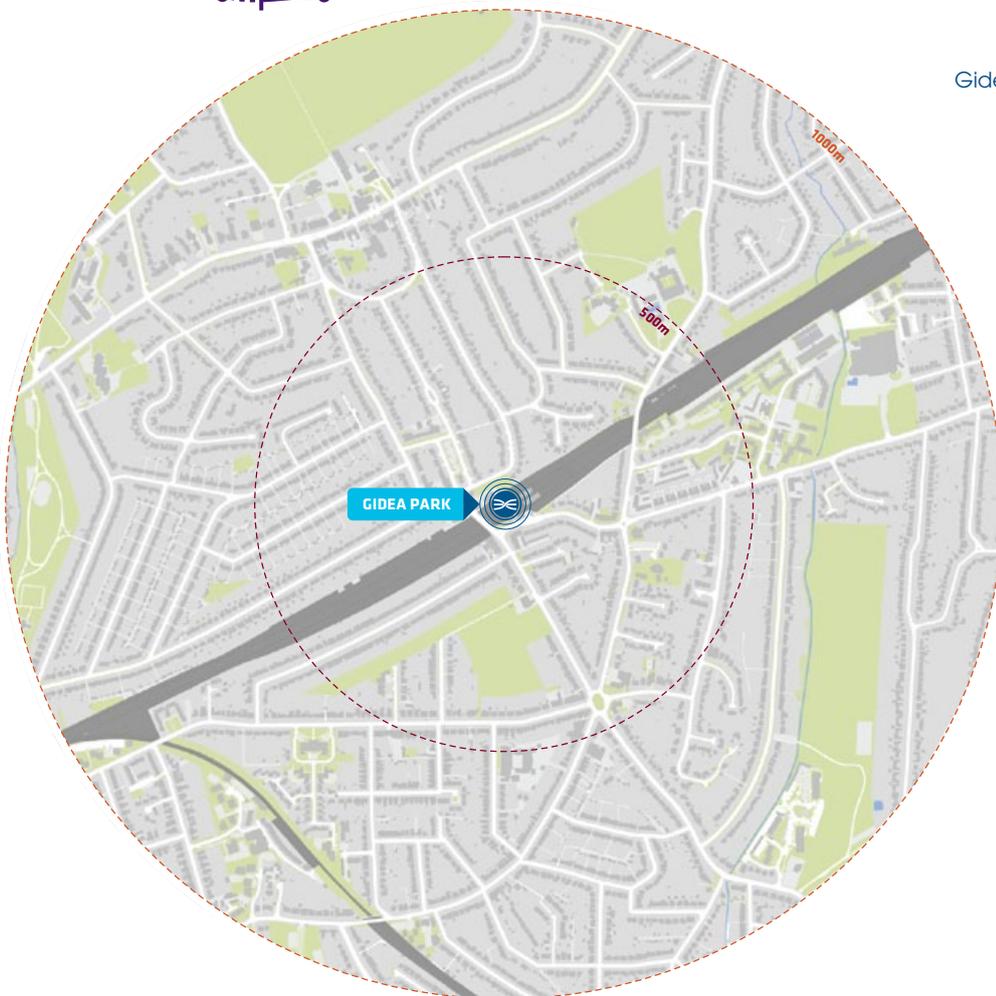
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Crossrail Context Map



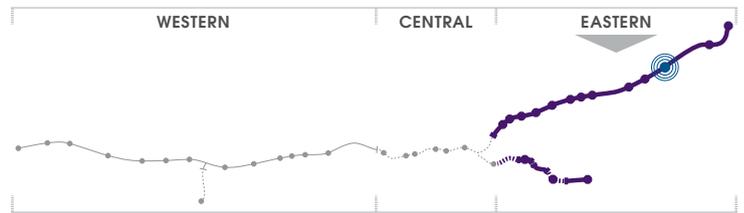
Eastern Section



Gidea Park Station

Harold Wood

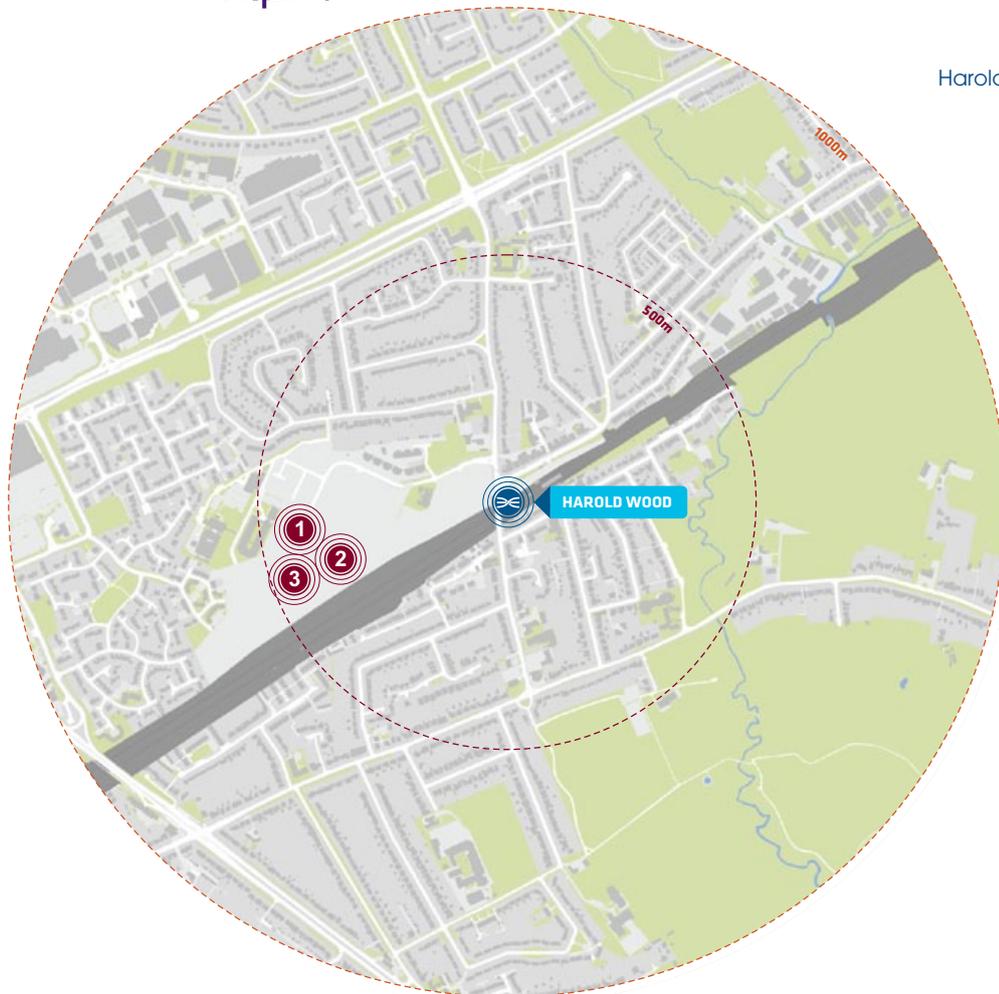
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Crossrail Context Map



Eastern Section

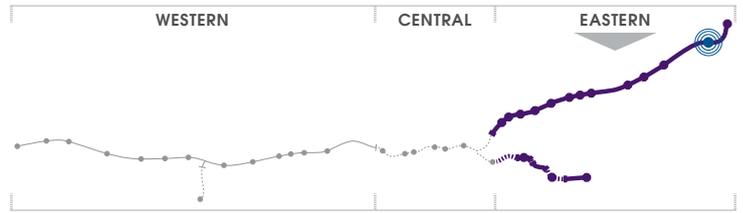


Harold Wood Station

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 Kings Park (Harold Wood Hospital) Phase 1A (P0004.11)	21	0	0	Full
2 Kings Park (Harold Wood Hospital) Phase 1B (P1002.11)	68	0	0	Full
3 Kings Park (Harold Wood Hospital) Phase 5 (P0412.12)	105	0	0	Full
TOTALS	194	0	0	

Brentwood

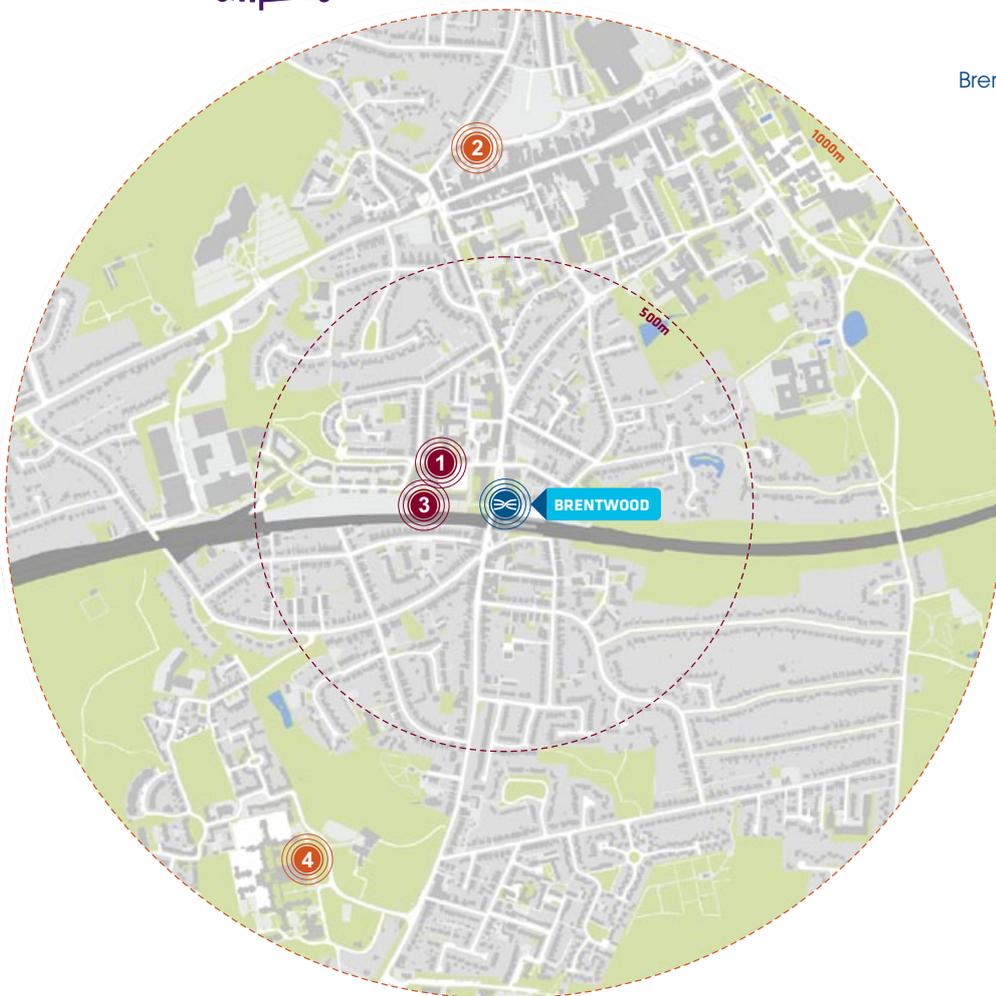
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Crossrail Context Map



Eastern Section

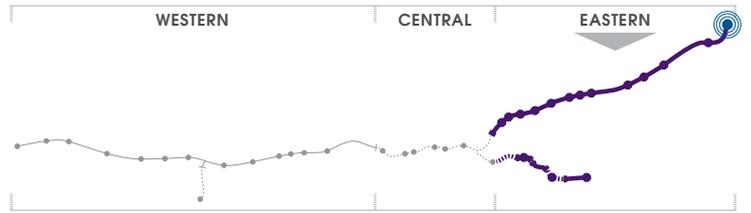


Brentwood Station

Site	Resi Units	Office Space (sqm)	Retail Space (sqm)	Permission Type
1 Brunel House (11/01195/FUL)	24	1,270	547	Full (Application)
2 William Hunter Way Site (13/00784/EXT)	14	0	7,340	Full (Application)
3 Former British Gas Site(09/00661/FUL)(12/00876/FULM)	53	0	0	Full
4 Former Warley Hospital (BRW/389/2010)(12/00876/FULM)	57	0	0	Full (Application)
TOTALS	148	1,270	7,887	

Shenfield

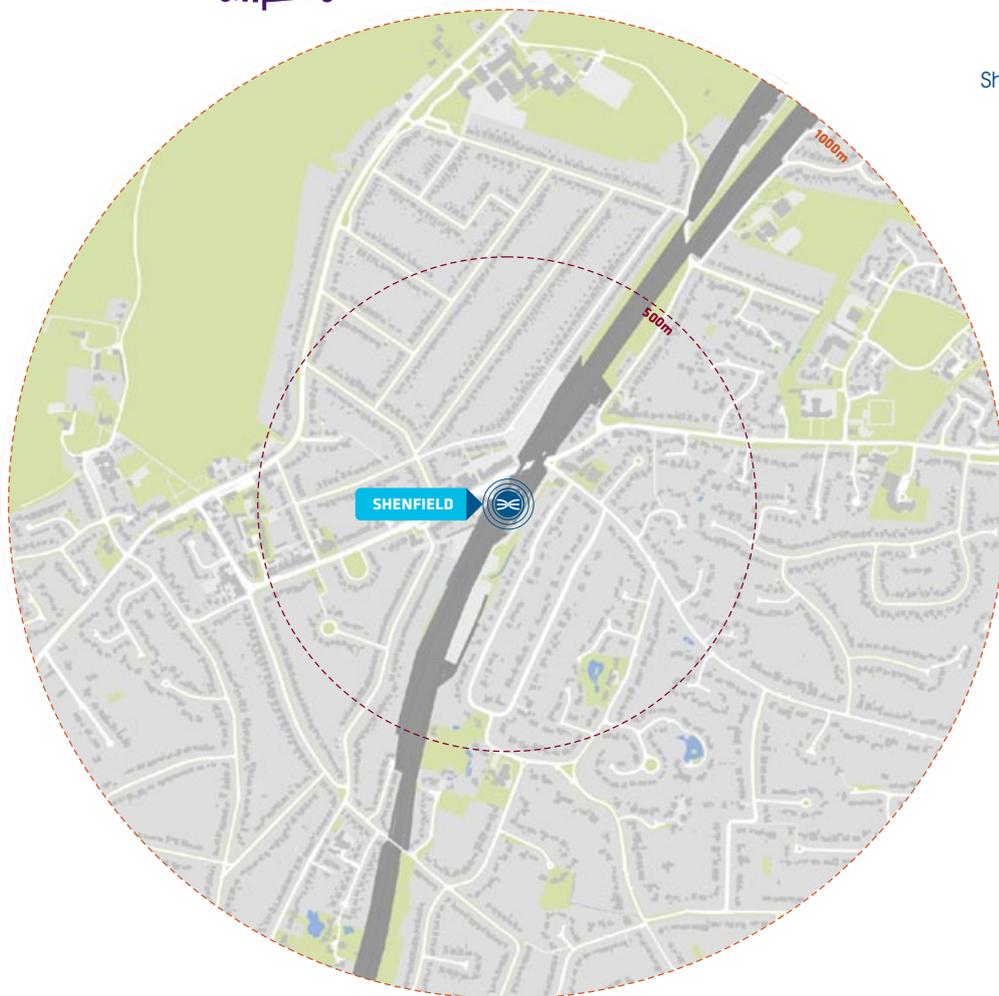
Data Sheet



Crossrail Context Map



Eastern Section



Shenfield Station

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