

Thurrock Borough Council

Thurrock Lakeside

Soft Market Testing of Housing Development Options within the
Lakeside Centre Study Area

FINAL REPORT
February 2012



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for Thurrock Borough Council

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Executive Summary of the Main Findings

Purpose and Approach

This report presents the findings of a Soft Market Testing (SMT) exercise undertaken on behalf of Thurrock Council to explore the potential for residential development in the Thurrock Lakeside Study Area. In particular, the purpose of the work has been to seek input from housebuilders and landowners as to the deliverability of new housing in Lakeside, what sites might be more attractive than others, what type of residential development might be delivered, whether there are any issues that impact on the viability of housing in this location and, if so, what conditions might need to be put in place to make development a more attractive and viable proposition.

The Lakeside Study Area (see Section 2 of this report) is a major area of opportunity for transformation. Council policy proposes new retail floorspace, up to 3,000 new dwellings, employment and leisure floorspace being provided here, helping to turn Lakeside into a new Regional Centre.

Using a concept plan prepared by the Council for the future of the study area (See section 3 of this report), interviews and discussions were held with a mix of housebuilders and landowners (see section 5 of this report). The findings of this, as presented in section 6 and summarised below, will be used to help inform the evolution of the Council's Site Allocations Issues & Options Consultation document. The report is one of a series of technical reports that have been prepared on behalf of the Council and which together will help shape the Site Allocations document.

Summary of Findings

Land Value and Deliverability

- (i) Perceptions of the study area as a location for residential development are mixed.
- (ii) The study area has established commercial use land values which are usually higher than residential land values. There may be no residential development until either:
 - infrastructural changes drive up residential land values; or
 - incentives for change are in place.



- (iii) Short term prospects for residential development are likely to be dependent on the inclusion of a foodstore. Two possible sites for a foodstore were identified with the concept plan for change in Lakeside:
 - The Junction
 - north of the A1306
- (iv) The recent planning application submitted by CSC to extend the existing shopping centre is likely to include up to 2,000sqm of convenience retail floorspace.
- (v) Should this be permitted, it could impact on the value and attractiveness of other sites for residential development. The Council therefore needs to be clear about where convenience retail floorspace should be located, how much and when.
- (vi) Residential sites will depend upon rising values through the provision of transformational change. Without this there is a danger that residential development will stall after the first phases are built, leaving isolated pockets of development.
- (vii) Proximity to the M25 and railways are good selling points but congestion is a negative.
- (viii) Land value issues mean that affordable housing targets may need to be severely reduced.

Residential Location and Type

- (i) Residential development should incorporate a good mix of housing types, not just apartments. This implies lower densities, therefore affecting the total quantum of units. , High rise and mixed use developments are perceived not to work.
- (ii) Development of at least 500 units is needed to achieve a critical mass.
- (iii) Land north of the A1306 is seen to be the best location for housing, partly because it is self-contained. But it may contribute little to the achievement of a Regional Town Centre Status at Lakeside other than delivering housing numbers. Although considered most attractive to developers, the location does though suffer from a number of constraints which affect value. It:
 - is designated Green Belt
 - has landfill



- is traversed by power lines
- (iv) A foodstore may be needed as part of the mix to help fund infrastructure and utilities costs.
- (v) Land around Alexandra Lake might be attractive for residential development, and apartment style development may work here. But the high existing use values potentially make this a difficult site to release.
- (vi) The Junction site might work as a residential/mixed use site. It may though need to be expanded to include adjacent land to make sure it does not become an isolated pocket of residential development
- (vii) The retail warehouse area around IKEA was not favoured by respondents. None thought it would happen and some were concerned about dilution of the retail offer.
- (viii) The scale of residential development is seen to be ambitious. A more realistic scale might be 1,500-2,000 units, though this needs verification through the SHLAA.
- (ix) The rate of development will be driven by sales. Housebuilders say that these currently average one a week per site, so, if three sites could be delivered in parallel, this might deliver a maximum of 150 units per year.
- (x) Viability and delivery are hampered by:
 - existing land investment values versus development value; and
 - lack of services and facilities for residential use

Actions for the Council

- (i) The Council's view is that transformational change may take 10-15 years to deliver. but, the views of developers expressed and reported in this document are, inevitably, a snapshot in time and influenced by current market conditions.
- (ii) Housebuilders will need to see evidence that a comprehensive plan for change is being implemented.
- (iii) A deliverable Masterplan is required.
- (iv) To change the image of Lakeside, improvements to the public realm are required.



- (v) The objectives for Lakeside may be hampered by the need to split town centre functions with Grays. Clear policy guidance on the role and function of each centre is needed.
- (vi) The location of the foodstore needs to be settled.
- (vii) The Council should provide advice on funding and delivery arrangements as well as clarity on levels of:
 - S.106 monies
 - affordable housing
 - CIL requirements
 - incentives to encourage housebuilding
- (viii) The Council should act as a broker between:
 - developers
 - statutory agencies
 - landowners

Core Messages

In summary, the Core Messages emerging from the SMT work are:

- The process of delivery must be sustained by on-going and proactive engagement with all stakeholders and key players with a clear business strategy to deliver.
- There is a need for a political commitment by the Council over a sustained period to set up and sustain robust delivery arrangements including credible partnership arrangements.
- There is a strong emphasis on the Council's willingness to use all its powers and assets as appropriate to deliver transformation.
- The avoidance of short-termism that could prejudice the vision for Lakeside will be crucial.
- Incremental change over time must be managed within the framework of a masterplan allowing for flexible delivery by the market.



1. Introduction

1.1. The Vision for Change

Thurrock Lakeside is an area of major transformational change. Council policy is to create a regional town centre here, providing a mix of new land uses, including a major expansion of and improvement to the retail offer, new homes and a full range of supporting facilities. The Single Issue Review of the East of England Plan and the Council's adopted Core Strategy create the framework for provision of up to 3,000 new homes as part of the vision for Lakeside over the next twenty years.

The Council's Core Strategy states that transformation of the Lakeside Basin into a regional centre will include the following:

- Up to 50,000sqm net additional comparison floorspace (by 2019);
- At least 4,000sqm net convenience floorspace;
- Up to 3,000 new dwellings;
- Employment and other services to broaden the employment base; and
- Commercial leisure floorspace, including food and drink uses, consistent with the function of a regional centre.

While there is some vacant and underused land within the Lakeside Basin, which could potentially be used for housing, the Council's approach is not simply to retrofit housing development onto the remaining sites. The Council wish to see a sustainable town centre emerge at Lakeside. An attractive centre, based on best practice place making principles, should be created that successfully integrate housing into the overall development, supported with community and commercial facilities located most appropriately to achieve social cohesion.

The Council is now taking this vision forward through the Local Development Framework and is proposing to publish a Lakeside Regional Centre Inset Plan within the Site Allocations Issues & Options Consultation DPD early in 2012. Spatial development options are being prepared by the Council and its partners that will set the framework for the transformation of the Lakeside Basin.

As part of the evidence base for this, the Council appointed consultants SKM Colin Buchanan, in association with Mike Lambert Associates, to carry out a Soft Market Testing (SMT) exercise with leading developers and housebuilders.



1.2. Purpose of Soft Market Testing

The purpose of the SMT exercise is to seek input from the market as to what it considers would be the key factors in creating the conditions to make new housing an attractive and viable proposition at Lakeside, providing the Council with an insight into how prospective developers might approach the delivery of particular sites or options, and what issues and constraints will impact upon the viability of the alternative development options for this area. Participants in the SMT exercise were encouraged to take account of the emerging vision for Lakeside, which includes the possibility of fundamental change and comprehensive redevelopment of parts of the Lakeside area over the next 20 years.

1.3. Structure of Report

This report presents the findings of the interviews and discussions with developers and landowners and their implications for the future redevelopment of the Lakeside study area. It includes:

- an overview of the study area, existing land uses and potential constraints to development;
- the concept plan for change prepared by the Council, identifying broad areas for development;
- the policy framework and viability issues impacting on the nature and quantum of location in the study area;
- an overview of the organisations participating in the SMT exercise (and those that did not); and
- a summary of the key messages emerging from discussions with participants, their implications for the scale of change and transformation sought by policy and, following from this, a series of recommended actions for the Council.



2. The Study Area

2.1. Overview

The Lakeside shopping centre and adjacent retail parks are, taken together, one of the largest single shopping areas in Europe. However, Lakeside is now facing competition from Bluewater and the newly opened Westfield centre in Stratford.

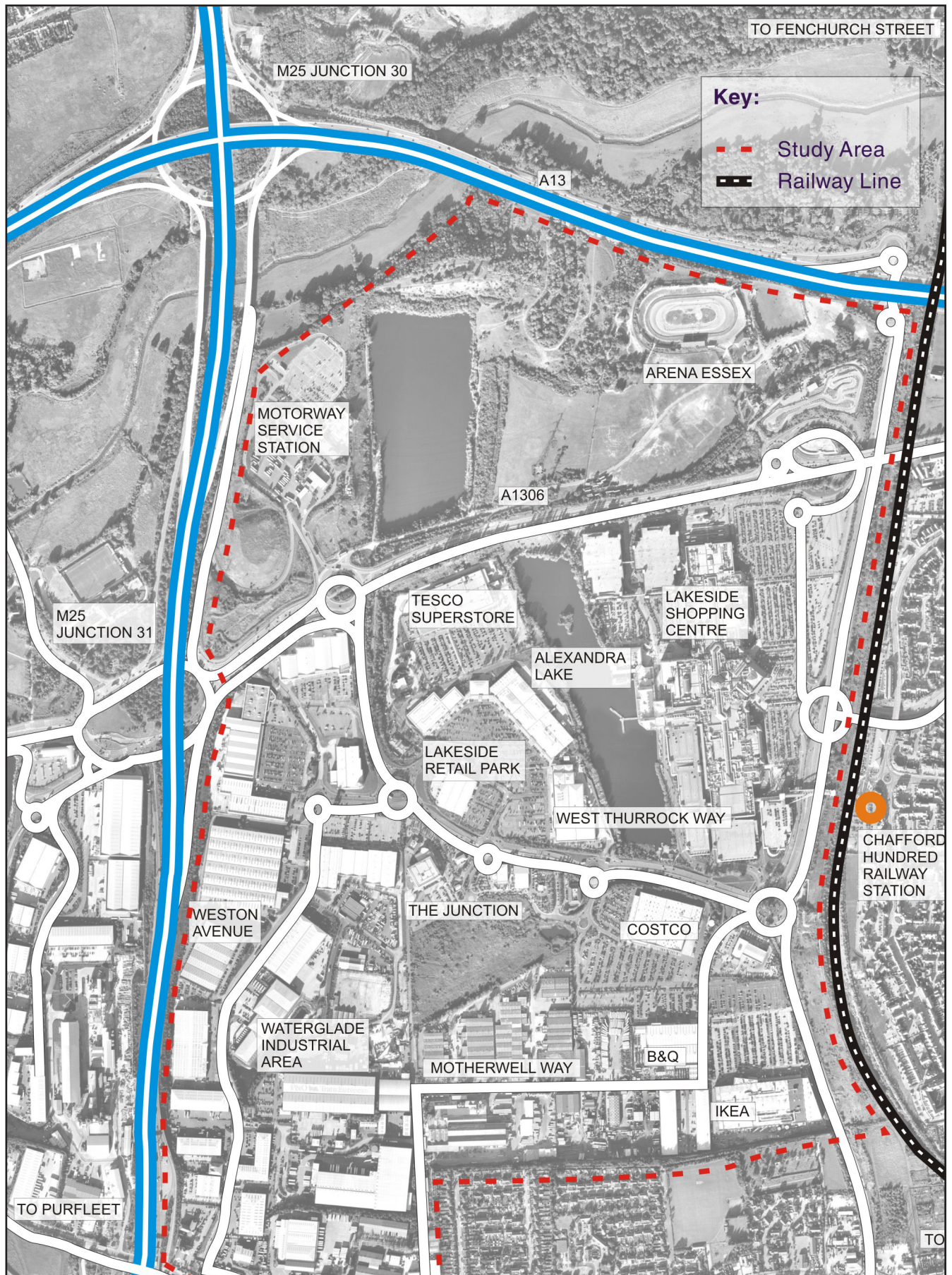
At present, the Lakeside Basin (Figure 1) is a large disparate area, with little sense of place and no overall coherence. The current format is dominated by car traffic and complicated by trips through the Basin by commercial vehicles. Pylons traverse the area; it has limited highway capacity and poor linkages to surrounding communities.

2.2. Land uses

In terms of land uses (Figure 2), the study area is perhaps best known for the Lakeside Shopping Centre: an enclosed shopping mall opened in 1990. This is surrounded by a mix of surface and multi-storey car parking. There are also a series of out-of-town style retail parks and retail warehouse units within the basin, which are again all served by large areas of parking. Major stores include Tesco, Ikea, Costco and Decathlon. At the heart of the retail area is Alexandra Lake. The Boardwalk development (comprising cafes and restaurants) in the shopping centre is however the only use that directly relates to, and fronts the lake. All other uses, including the adjacent retail park and Tesco superstore turn their backs to the lake. Warehousing, distribution and light industrial uses also comprise major land uses. These form a buffer to the M25 but also separate the retail uses from the one small cluster of existing homes in the area (along London Road).

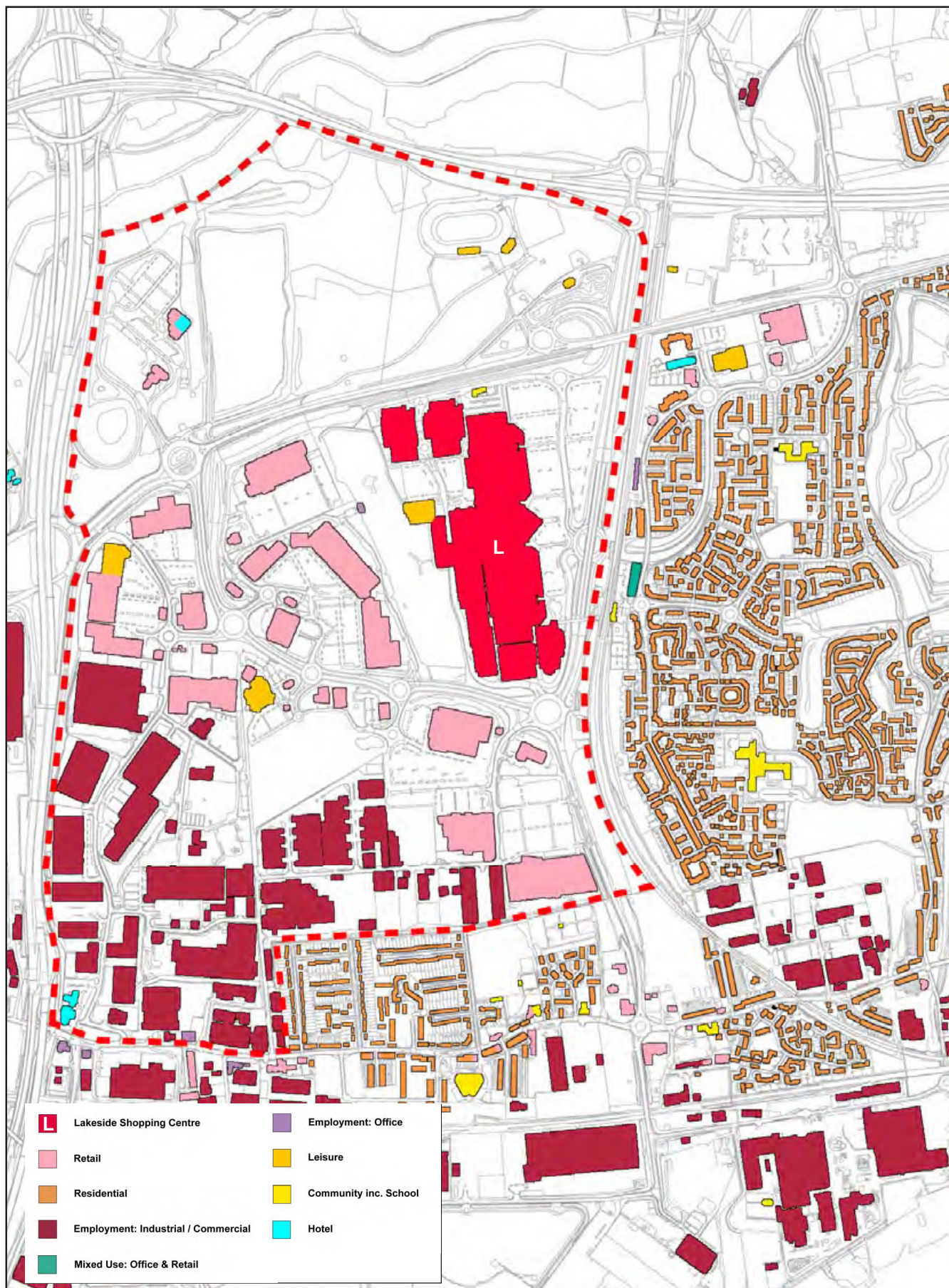
To the north of the shopping centre and retail parks, land is designated as falling within the metropolitan green belt. However, uses including a motorway service station, Speedway and go-kart track are found here. These are cut off from the retail offer by the A1306 Arterial Road.

To the south and west, the surrounding area is primarily industrial in nature. These uses extend down to the River Thames waterfront and west towards Purfleet. The Chafford Hundred residential community is to the east of the study area, though, as noted above, it is cut off from the study area by a combination of road and rail infrastructure.



Thurrock Lakeside SMT: Final Report
FIGURE 1: STUDY AREA

Image Source: Google



Thurrock Lakeside SMT: Final Report
FIGURE 2: EXISTING USES

Image Source: Thurrock Council



2.3. Access

The Lakeside Basin is a former chalk quarry and is, effectively, a self contained part of the urban fabric: it is bound on all sides by major roads and rail. To the west is the M25 and approach to the Dartford crossing; to the north is the A13; to the east a combination of the A126 and Grays – Fenchurch Street railway line; and to the south is London Road. These all form local barriers to movement but, conversely, provide excellent proximity and access to the strategic road network. Junctions 30 and 31 on the M25 provide connections to the highway network serving Lakeside. Public transport provision is currently provided by way of a bus station to the north of the shopping centre and a footbridge linking the shopping centre with Chafford Hundred railway station. Severance from surrounding communities and other land uses is therefore a significant challenge for future sustainable planning.

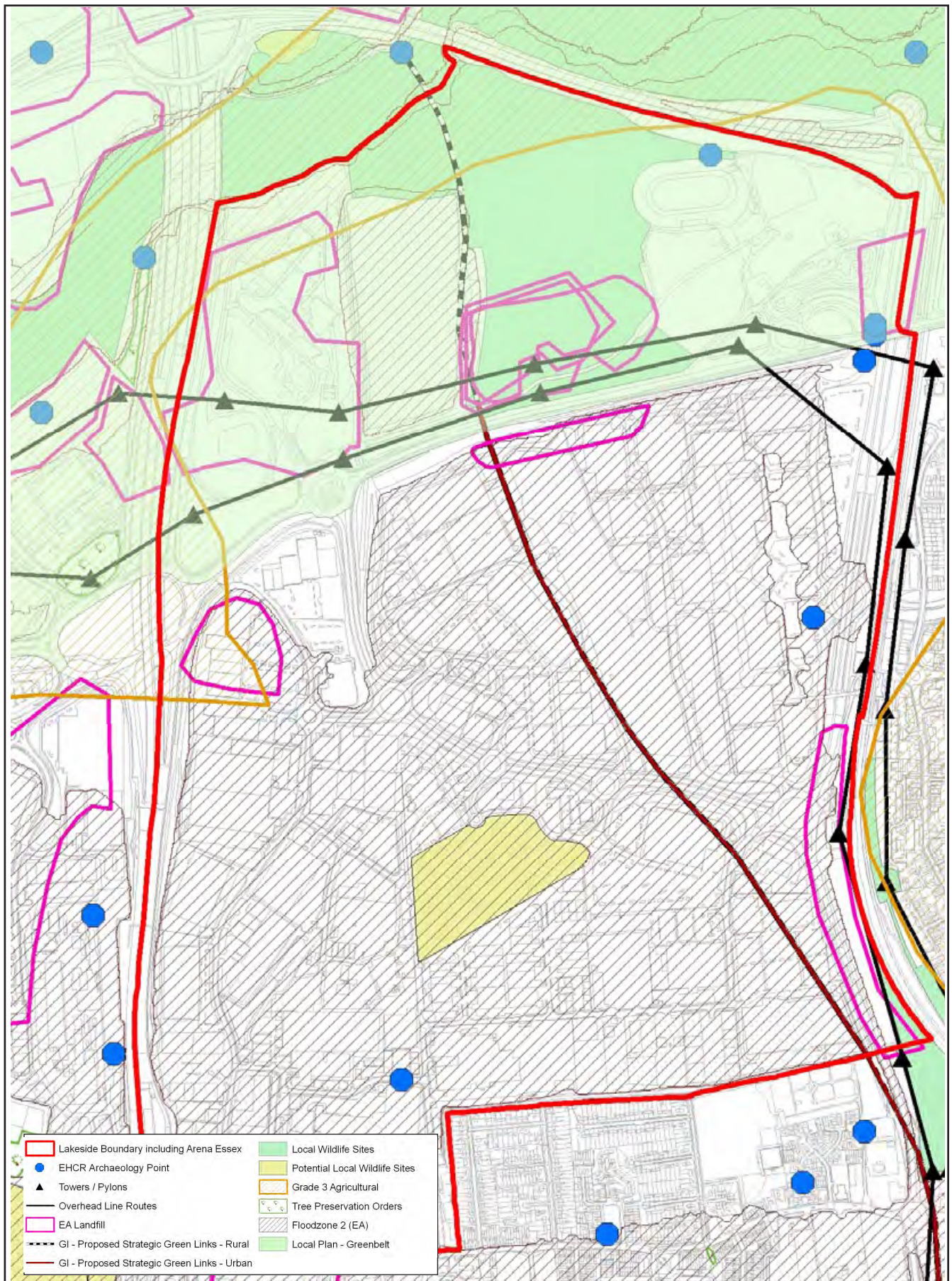
2.4. Constraints

The majority of the study area falls within EA Flood zone 2 (Figure 3). This is classified as a ‘medium probability’ area of flooding and defined as land assessed as having between a 1 in 100 and 1 in 1000 year probability of river flooding (or between 1 in 200 and 1 in 1000 year probability of sea flooding)¹. To the north of the A1306 Arterial Road land is identified as falling within the green belt. Significant areas are also identified as local wildlife sites and or locations of landfill. Overhead pylons run alongside the A1306 and the A126. There is currently one large vacant site within the study area (to the south of the B186 West Thurrock Way). This is however identified as a potential local wildlife site.

2.5. Land Ownerships

There is a complex pattern of land ownership in the study area, with more than 50 different land owners (see Appendix). Ownerships are particularly numerous in the employment areas and, in part, reflect the current end user of the site. Larger parcels of land ownership exist in the retail area. Main land owners in the retail area comprise Capital Shopping Centres, Land Securities, The Junction Ltd Partnership, Tesco Stores Ltd, Costco Wholesale Ltd, B&Q Properties Ltd, Ikea and Lancaster Plc. To the north of the A1306 Arterial Road the area of green belt land is split into three ownerships: Arena Leisure Enterprises Plc, Aveley Property Holdings and the Secretary of State for Transport (who own the motorway service station).

¹ CLG, March 2010, PPS25: Development and Flood Risk



Thurrock Lakeside SMT: Final Report
FIGURE 3: CONSTRAINTS PLAN

Image Source: Thurrock Council

3. Lakeside Development Concept

3.1. Overview

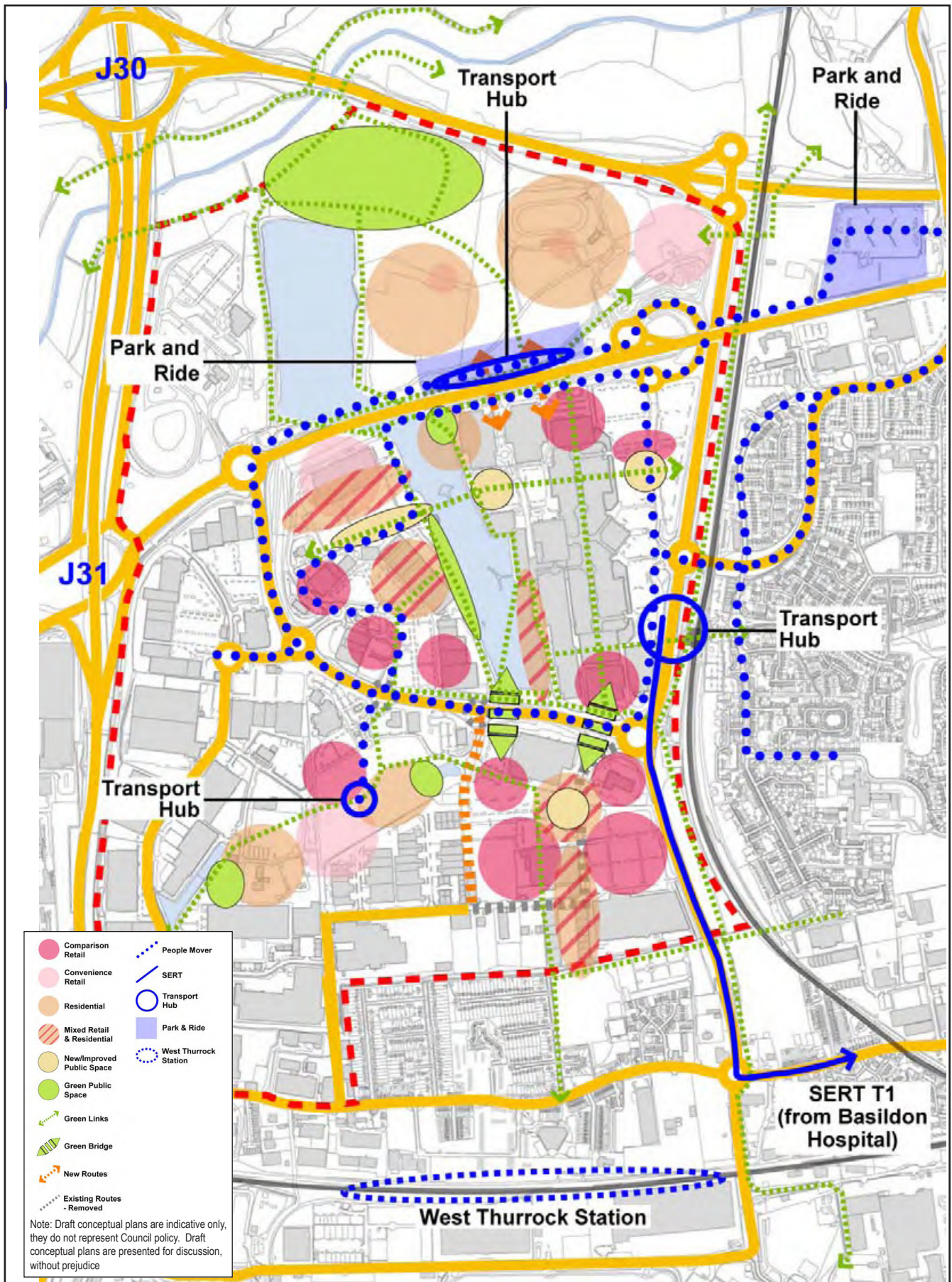
The SMT exercise has been based upon an overall concept for change and development as opposed to a series of different options for the area. The concept plan (Figure 4), prepared by Thurrock Council, identifies potential locations for development, uses and housing densities. It also identifies potential transport and public realm interventions. This concept plan has formed the basis of discussion with developers and landowners through the SMT exercise. It is the Council's intention that the findings of this work will inform the generation of spatial options for the emerging Site Allocations DPD.

3.2. Residential Development Areas and Densities

The concept plan identifies five broad areas for residential development (Figure 5) and the development densities associated with these:

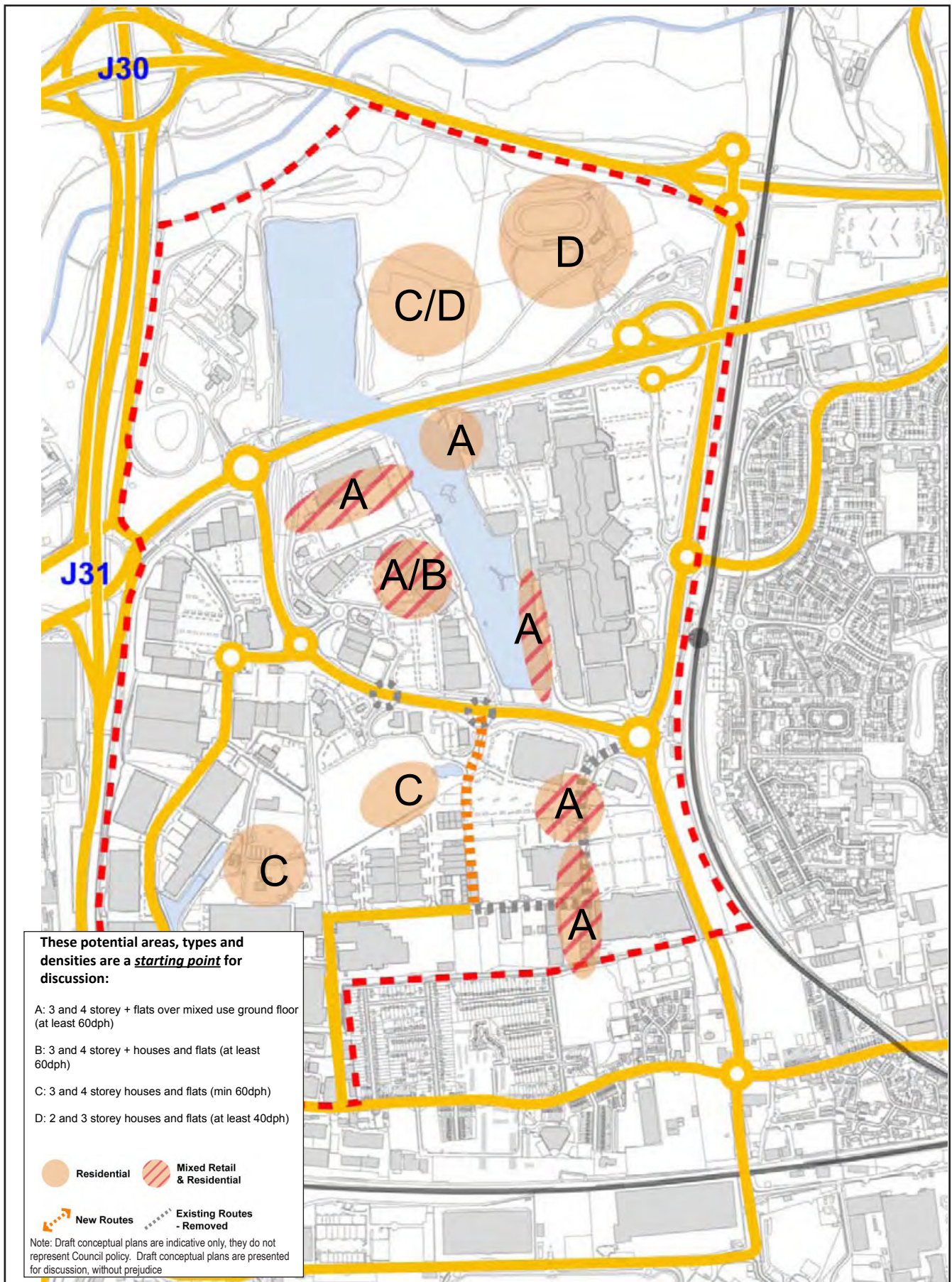
- To the north of the A1306, housing should comprise a mix of two and three storey houses with a minimum density of at least 40 units per hectare, and three to four storey houses and flats with a minimum density of 60 units per hectare.
- On the lakefront around the existing shopping centre, comprising a mix of residential and residential-led mixed use development. It is assumed that these units would take the form of three or four storey flats and be built out at a density of at least 60 units per hectare.
- As part of any redevelopment of the Lakeside Retail Park and Tesco store (to the west of Alexandra Lake). It is assumed that these would take the form of three and four storey houses and flats built out at a density of 60 units per hectare. These would all form part of a mixed use development.
- On land at and adjacent to the Junction site, comprising a mix of three and four storey houses and flats at a minimum density of 60 units per hectare.
- As part of any redevelopment or restructuring of the cluster of retail warehouses around Ikea. This would comprise mixed use development with three and four storey houses and flats at a density of at least 60 units per hectare.

It is acknowledged that following initial feedback on the Soft Market Testing the Council has broadened the potential residential areas but these were not specifically tested in this Study.



Thurrock Lakeside SMT: Final Report
FIGURE 4: TOWN CENTRE CONCEPT PLAN

Image Source: Thurrock Council



Thurrock Lakeside SMT: Final Report
FIGURE 5: POTENTIAL RESIDENTIAL LOCATIONS

Image Source: Thurrock Council



3.3. Infrastructure

In parallel with the SMT exercise the Council has commissioned a series of other technical projects. These include updates to the Employment Land Study and the Strategic Housing Land Availability Assessment (SHLAA). In addition, an assessment of the infrastructure needs associated with the scale of development of Lakeside has been commissioned² (see section 4 below). Based upon the emerging findings of that study, and depending upon the scale of change that occurs, the infrastructure needs could include³:

- enhancements to public transport connectivity through the phased introduction of a Lakeside Hoppa Bus and the proposed implementation (subject to DfT funding approval) of a South Essex Rapid Transit connecting Lakeside with Brentwood).
- upgrades to the strategic highway network (including M25 Junction 30 and enhancements to the A13
- the reconfiguration of the Lakeside internal road network; the extent of this varies considerably between the different development options which are subject to consultation;
- implementation of an area wide urban realm strategy (including the provision of public green space and a local green grid network to facilitate internal connectivity;
- a new Primary School would be required under Development Options 1 and 2 considered in the infrastructure assessment. All options would require expansion to existing primary and secondary schools in the area.
- Upgrades to the existing waste water pumping stations at London Road and/or the private on site pumping station.

² SKM Colin Buchanan for Thurrock Council, January 2012, Thurrock Lakeside Basin Infrastructure Assessment, Draft Final Report

³ List based upon infrastructure needs associated with the assessment of the option 1 level of development set out in the Infrastructure Assessment. This makes provision for between 1,920 and 2,750 new homes in the study area. This option is closest in scale to that tested through this Soft Market Testing exercise.



4. Evidence Base and Context

4.1. Introduction

Council policy is to transform Thurrock Lakeside from a Regional Shopping Centre into a Regional Town Centre, as confirmed in the Core Strategy.

A key feature of this transformation will be the design and delivery of a sustainable community, with a mix of land uses and community services which serve a wider than local function. To operate as a town centre this must be supported by a significant residential population, in an area which is currently dominated by retail and industrial land uses.

The delivery of up to 3,000 additional dwellings is therefore an integral component of the development objectives for the Lakeside Basin.

This section of the report provides an overview of the evidence underpinning the Council's vision for change and transformation in Lakeside. It covers (i) the planning policy framework (ii) technical policy documents undertaken to inform planning policy at the local (i.e. Thurrock) level and (iii) viability issues. This third component includes a desk-based review of the financial viability issues that may impact on the ability to deliver the Council's objectives for Lakeside.

4.2. Planning Policy Framework

4.2.1. *East of England Plan: Single Issue Review*

The starting point for this work is the Single Issue Review (SIR)⁴ of the East of England Plan. This revises policies ETG2 and E5 of the East of England Plan so that the northern part of the Lakeside Basin (the study area) becomes defined as a Regional Centre. This transformation is dependent upon the following conditions set out in amended policy ETG2 '*Thurrock Key Centre for Development and Change*':

⁴ Go-East, January 2010, Thurrock Key Centre for Development and Change: A Revision to the Regional Spatial Strategy for the East of England

Policy extract ETG2: Thurrock Key Centre for Development and Change

2. *Local Development Documents should guide the regeneration and remodelling of the wider Lakeside Basin and West Thurrock area on sustainable mixed use lines by:*
 - i. *defining the boundary of the area;*
 - ii. *providing for a broader employment base through the identification of key strategic employment sites;*
 - iii. *promoting a high quality built environment and public realm that is more coherent, legible and integrated;*
 - iv. *protecting and enhancing green infrastructure including the provision of further accessible natural green space to meet local standards;*
 - v. *promoting a greater mix of uses, including additional residential, office, hotel, and assembly and leisure activities;*
 - vi. *improving the range of services and facilities;*
 - vii. *securing more sustainable movement patterns, reduced private motor vehicle dependence and complementary travel demand management measures including an area-wide travel plan;*
 - viii. *improving local accessibility and connectivity by public transport and pedestrian and cyclist permeability throughout the area including consideration of ways to reconnect the north and the south of the area, a new high frequency service rail station in the south, and a personal rapid transport system; and*
 - ix. *providing the necessary improvements to the local and strategic road network.*
3. *The attainment of Regional Centre status for the northern part of Lakeside Basin is conditional upon the adoption of Local Development Documents providing for:*
 - i. *a town centre boundary, with a designated primary shopping area;*
 - ii. *a greater mix of uses and services including a significant increase in housing and office accommodation and the provision of convenience retail floorspace;*
 - iii. *an indicative scale of floorspace for each major town centre use;*
 - iv. *indicative thresholds for new retail floorspace, phased with required infrastructure;*
 - v. *design and public realm enhancements;*
 - vi. *improved accessibility for pedestrians and by non-car modes, including the introduction of a car parking charging and management regime; and*
 - vii. *an implementation plan.*
4. *Retail expansion at the new Regional Centre should be limited to 50,000 m² of net comparison floorspace by 2019 together with an appropriate amount of convenience floorspace to reflect the Borough's population growth. No retail expansion should be approved until the adoption of the appropriate Local Development Documents and the imposition of appropriate conditions and obligations to secure the objectives of paragraphs (2) and (3). Any further strategic retail development beyond the initial 50,000m² net of comparison retail floorspace at the new Lakeside Regional Centre should be considered through future RSS reviews.*



Although specifying the quantum of comparison retail floorspace to be accommodated in the area, the SIR does not specify the housing potential for the area. Background documents prepared on behalf of the East of England Regional Assembly⁵ set out three scenarios for growth, including residential. The figures range from 1,800 new homes up to more than 3,800 in the preferred scenario. However, the majority of these are identified as being outside the study area being considered for the SMT study and are instead located along London Road, in South Stifford and Chafford Hundred. We also note that none of the scenarios included development in the Green Belt (other than for leisure uses) in land to the north of the A1306.

4.2.2. Core Strategy

The Core Strategy was submitted for examination purposes in April 2010 and adopted in December 2011.

The Core Strategy is in line with the findings and recommendations of the SIR. Lakeside is one of five primary regeneration areas in the borough: it will be '*transformed into a Regional Centre (town centre) providing a range of retail, leisure, employment, housing and new transport facilities*'.

In the northern part of the Lakeside area (i.e.: the study area being considered through this SMT report), the Core Strategy notes that transformation will include⁶:

- up to 50,000 sqm net additional comparison retail floorspace (by 2019)
- at least 4,000 sqm net convenience floorspace;
- up to 3,000 new dwellings;
- employment and other services floorspace to broaden the employment base; and
- commercial leisure floorspace, including food and drink uses, consistent with the function of a regional centre.

Although the Core Strategy notes that uses should be provided in Lakeside that are consistent with the function of a regional centre, Grays town centre will remain the focus for cultural, administrative and educational functions.

The Core Strategy establishes the Council's position with regard to housing development. An average of 1,130 new dwellings are required each year over the period 2009 – 2021 to meet growth targets. Proposals for new development should be design-led and be of an

⁵ GVA Grimley for EERA, March 2009, Lakeside Basin Single Issue Review

⁶ See Policy CSTP7 – Network of Centres, Adopted Core Strategy, December 2011



appropriate density to contribute to the achievement of sustainable neighbourhoods. In key regeneration areas – such as Lakeside – a minimum density of 60 dwelling units per hectare will be sought. A mix of housing types should also be provided, reflecting need, the market and local context. A minimum provision of 35% of the total residential units built should be affordable, of which 70% should be social rented accommodation. The balance should be provided as intermediate housing. The ability of a site to accommodate affordable housing will, where appropriate, be subject to ‘open book’ analysis.

The Core Strategy recognises that the scale of change in Lakeside will have a significant impact on access and movement across the borough. Policy CSTP14 thus seeks to secure more sustainable movement patterns, improved public transport accessibility, walking and cycling routes, a new railway station and potentially, a personal rapid transit system. It also seeks improvements to the road network and specifies the introduction of a car parking charging and management regime.

Further, the Core Strategy notes where strategic scale releases of the Green Belt might take place. Land to the north of the A1306 within the study area (i.e.: the Arena Essex site), is currently within the Green Belt but is not identified for release.

4.3. Technical Evidence Base

4.3.1. *Lakeside and West Thurrock Masterplan*

Prepared on behalf of the Thurrock Thames Gateway Development Corporation (TTGDC)⁷, this non-statutory masterplan covered a much larger area than is now being considered through this SMT report, extending down to the riverfront and through South Stifford. This was prepared in advance of the SIR and thus does not have as its central proposition the creation of a regional town centre. It does though set a framework for significant growth and development in the area, including new retail and leisure uses in what it terms the ‘Adventure Zone’ (land around the existing retail offer). The land use schedule for this area suggests that it could accommodate 99,500sqm retail, commercial and office space, 17,000sqm A3 space, 36,500sqm leisure space and 250 new homes (substantially less than now being explored). It is unclear from the masterplan what form these homes would take, although most would appear to be located to take advantage of the views across Alexandra Lake. A hotel, conference facilities, health spa and major leisure use are identified on the Green Belt land to the north of the A1306. The masterplan does not envisage any significant restructuring or redevelopment of existing industrial uses outside the main area of change.

⁷ Benoy et al for TTGDC, November 2008, Lakeside and West Thurrock Masterplan



4.3.2. Strategic Housing Land Availability Assessment (SHLAA)

The Council's SHLAA⁸ is currently being updated for the Lakeside area in parallel to this SMT study. This update will provide more detail on the development capacity and housing potential of sites within the study area. At present, the SHLAA notes that potential exists for a mix of uses within the Lakeside area, including new homes and retail provision, subject to the outcomes of the SIR and further detailed work by the Council as part of its Site Specific Allocations DPD, and in particular the Chapter entitled 'Lakeside Regional Town Centre Plan'. It notes the potential for up to 3,950 new homes in the Lakeside Basin between the A1306 and London Road, depending on densities achieved. This upper figure is within the range of densities considered in the design exercises included in SHLAA (Vol. 2) undertaken by Tribal Consulting for the Council in 2010.

4.3.3. Employment Land Review (ELR)

As with the SHLAA, the Council's is being updated. Other than a limited number of sites considered largely unsuited for continued employment use, the current study⁹ recommends that all of Thurrock's designated employment land remains protected. Land to the south of London Road is identified as one of the sites recommended for release from employment use. Although within the wider Lakeside area, it does not fall within the study area for this SMT study.

Much of the study area at present is within the Lakeside / Waterglade Industrial Estate. The employment land study identifies a small area of vacant employment land here (on Jordrell Way) and identifies this as an '*opportunity to intensify the site for Class B uses*'. Overall, the study recommends that the primary industrial and commercial areas within the estate be retained. However, it acknowledges that the TTGDC masterplan identified the eastern part of the employment cluster as having potential for retail and leisure uses. The employment land study thus recommends that the eastern part of the cluster be re-designated for leisure activities.

4.3.4. Preliminary Assessment of Infrastructure Requirements for Lakeside

The Infrastructure Assessment Study builds upon the Thurrock Infrastructure Prioritisation and Implementation Programme (TIPIP) which was prepared in support of the LDF Core Strategy. The purpose of the study is to undertake a preliminary

⁸ Tribal for Thurrock Council, February 2010, Strategic Housing Land Availability Assessment

⁹ URS and Knight Frank for Thurrock Council, January 2007, Thurrock Employment Land Review



comparative assessment of the full range of infrastructure requirements (as defined in TIPIP) of each of the spatial development options for Lakeside. The study is directly informed by the outputs of the parallel Transport Modelling Study, which is assessing the traffic impacts of the potential development options on vehicle trips and highway network capacity. The findings of the SMT study will inform the infrastructure study by providing an insight into how prospective developers might approach the delivery of development and associated infrastructure. The Infrastructure Assessment study outputs provides a high level schedule of the needs associated with each of the potential Lakeside development options to be consulted upon in the Issues and Options Site Allocations DPD.

4.3.5. Strategic Housing Market Assessment (SHMA)

Covering Thurrock, Basildon, Castle Point, Rochford and Southend, the Thames Gateway South Essex SHMA¹⁰ was originally produced in 2008 and updated in 2010 to reflect changes in the housing market. The SHMA establishes the levels of housing need within each authority and makes recommendations as to the future approach to achieving a choice, quality and mix of housing across the South Essex area. Findings of relevance to Thurrock (the SHMA is not broken down further so does not allow for comment on Lakeside for example) are:

- House prices in TGSE are relatively low in a regional context and this supports movement of both first-time buyers and households looking to step up the housing ladder to the sub-region;
- Thurrock is the least expensive local authority area in Thames Gateway South Essex;
- The housing offer in Thurrock is narrow and should be developed. Across the sub-region, the flatted and urban living offer to appeal to younger households is under-developed;
- The number of affordable housing completions in Thurrock is currently on a downward trajectory, but the development pipeline predicts an upward trajectory over the coming years. Having said that, the housing output will need to increase substantially in order to meet regional housing targets. But, this is set against a *‘period of continued uncertainty in terms of developer appetite for significant housing delivery and a backdrop of stalled and challenged housing construction projects’*. This is significant. The SHMA states¹¹:

¹⁰ GVA Grimley for Thames Gateway South Essex Strategic Housing Group, April 2010, Strategic Housing Market Assessment: Update 2010

¹¹ See para 4.9



‘The individual local authorities’ housing delivery performance against RSS target will have implications for the ability of the TGSE Housing Market to meet overall housing demand and deliver the levels of affordable housing required to meet extant and future predicted housing needs. This is particularly focused within Basildon and Thurrock without adequate land allocations through planning policy and direct intervention in development projects to support new housing delivery’.

4.3.6. Affordable Housing Viability Study

This report¹² notes that ‘there is a significant difference in the impact of affordable housing levels on the viability according to demand area. The Council may therefore wish to consider applying a higher affordable housing requirement in areas where demand is strong, and a reduced requirement in low demand areas’. The Lakeside Basin, at present, would be considered a low-demand area. However, the work goes on to recommend that a district-wide approach to affordable housing provision, as opposed to an area-based approach, be adopted, providing ‘clarity to developers, while allowing negotiation based on open book analysis to allow developers to demonstrate the maximum reasonable amount of affordable housing is being proposed’.

The Core Strategy (at policy CSTP2) sets out the Council’s position on the provision of affordable housing. This is noted in the relevant section on the Core Strategy above.

4.3.7. Emerging Community Infrastructure Levy (CIL)

Residential CIL rates for the Borough are currently being drafted¹³. For the sole purpose of fostering discussion during the SMT exercise a possible CIL rate of £20/sqm for residential uses in association with an affordable housing provision of between 15% and 35% was assumed¹⁴.

In terms of establishing non-residential CIL charges¹⁵, specific issues with regard to Lakeside have been identified (although, again, these have yet to be endorsed by the Council). In particular, it is noted that the scale of change envisaged will require some large infrastructure items to be provided, without which it would be unacceptable in planning terms. Previously these would be the subject of one or more s106 agreements. If the Council were to set a CIL rate expressly to recoup the cost of these items, it would be unlawful because CIL can only have regard to viability. Yet it would be virtually

¹² Tribal for TBC, February 2010, Affordable Housing Viability Assessment Final Report

¹³ URS Scott Wilson for TBC, on-going

¹⁴ It should be noted that this is not the Council’s formal position as a range of scenarios are still being modelled and considered.

¹⁵ SKM Colin Buchanan with Hewdon Consulting for TBC, May 2011



impossible to set a CIL based on viability in advance - reliant on outline proposals and (presumably) some years before development commenced – that would guarantee to recoup all the required infrastructure costs. There would be a significant risk that the Council would face a funding shortfall and/or the developer(s) would not be provided with the infrastructure needed to enable development. This would not be in anyone's interest.

There are some possible solutions to explore. The CIL regulations prohibit the use of s106 agreements where more than five contributions are sought for the same item. It is assumed that there will be more than five developments in Lakeside, so they could not all contribute to all the items. However, it may be possible to attribute the cost of different items to different pools of developments so that there are never more than five contributions.

Alternatively, the CIL regulations prohibit the use of s106 agreements but not the use of s278 highways agreements. These could be used to ensure the largest items of expenditure are dealt with effectively. It may also be possible to make more use of 'Grampian' type planning conditions. Whatever approach is adopted, it will require the agreement and co-operation of all parties.

Furthermore the adoption of a CIL charging schedule will afford the Council far greater flexibility in the deployment of developer contributions compared with s106 obligations. As the Charging Authority, Thurrock Council will have considerable flexibility about where and when to allocate CIL receipts, as long as they are used to provide or maintain infrastructure (as defined in the Planning Act 2008). The Council will be expected to set out its proposals for CIL expenditure in a s123 list, and could choose to prioritise Lakeside related Infrastructure in the early years of the Plan period in order to overcome any funding shortfalls for critical infrastructure.

4.4. Housing Viability and Land Values

4.4.1. Residential values

There is currently little existing residential development within the Lakeside Basin development area. That which exists is of generally poor quality, comprising primarily semi detached public sector style dwellings which appear to have been built as part of the post or possibly inter-war housing expansion outside London.

The surrounding environment is commercial in nature, comprising large format single storey retail warehousing and industrial uses. This environment does not contribute



positively to the setting of the residential properties or the vacant land available for potential residential development.

This is reflected in the prevailing values that are being achieved for sale of properties in the immediate and surrounding locations. Research into actual sales figures indicate values that are generally below £200,000 per dwelling, indicating a maximum demonstrated sales value per square foot of circa £200, and a typical value that is considerably less. This is very low for a location so close to London.

This level of value is borne out by the Council's Affordable Housing Viability Assessment (see above), which confirmed values for low demand areas, such as the Lakeside Basin, as in the order of £1,790 - £1,950 per m² (£166 - £181 per square foot). This study confirms that, at these levels of value, it would not be possible to provide affordable housing or to meet the costs of providing the required social infrastructure to support the population that circa 3,000 units would generate.

This therefore suggests that the delivery of a sustainable community would be likely to require public intervention and investment.

4.4.2. *Current use values*

A further obstacle for the delivery of residential development in this location is that the sales values anticipated do not support significant land values. The land in the Basin has a history of industrial and commercial use, for which there remains a relatively robust market in this location, and demand based on the destination that has been created by the retail parks and Lakeside Shopping Centre, and the strategic location of the site for logistics based businesses.

It is therefore likely that landowners have aspirations for site values based on an existing use value that is likely to exceed the value generated by residential development. There is therefore little incentive to sell unless the existing value can be underpinned through a mix of commercial and residential uses or through acquisition by CPO. Even if CPO powers were used in this location, the compensation would still be on existing or lawful use values, which if higher than residential would mean that a subsidy would be required from somewhere – presumably public purse. In other words CPO may not be an option if the disparity in values remains.

4.4.3. *Attraction of the location to potential developers*

The key issue for residential developers is the ability to dispose of the completed units once they are in the process of being built. For units to sell quickly, the location needs to



meet the needs of potential purchasers. If it does not there will be insufficient demand for the units.

Demand is generated by locations that can provide for the following typical requirements:

- A high quality environment.
- Access to local facilities, such as doctors surgeries, dentists, places of worship and community facilities.
- Access to local good quality schools.
- Access to local shopping, as well as regional shopping facilities.
- Access to leisure and cultural facilities.
- Public open space, play areas etc.
- Access to public transport links.

Whilst the proximity of Lakeside and the associated leisure facilities is an advantage, as is the relatively nearby Chafford Hundred Railway station, there is very little other social infrastructure within the Basin itself. There are no primary or secondary schools, no health facilities or community centres, and little financial opportunity for these to be provided as part of the residential development, as the values generated are unlikely to be able to bear the costs involved.

Without such facilities, the residential units will be difficult to sell, and will therefore reduce the appeal of the location to potential developers, who will view the location as a higher risk than other opportunities that can provide the services required.

4.5. Summary Messages

The aspiration for change and transformation within Lakeside is well documented and the Single Issue Review of the East of England Plan provides the policy basis for this, which has been taken forward through the Council's Core Strategy.

However, what is yet to be established is just how much housing can be accommodated within the Lakeside Basin (and its immediate surrounds: the Arena Essex site and retail/employment areas to the west which back onto the M25) as opposed to the wider Lakeside area. The former, which comprises the study area for this Soft Market Testing exercise, is much smaller than that subject to the Single Issue Review and previous masterplanning exercises. These extended to include land south of London Road and east into South Stifford. It is these areas that were previously identified for the majority of new housing, with only a limited amount in the Basin, in and around the main shopping centre.



This brings with it many challenges, not least in terms of understanding how a new place can be created, but what is needed to help facilitate the scale of change envisaged. This may include the need to relax some planning policies; that part of the study area to the north of the A1306 for example is entirely within the green belt, yet is potentially the major area of opportunity for new residential in the Basin. Challenges are also likely to include the provision of a wide range of supporting infrastructure and the contribution that can be made to change perceptions of the area: from one that is solely a destination for retail and leisure activities, to one that is an attractive place to live. But this requires significant investment.

To ensure market interest in the location, the view from the technical work is that the provision of services and creation of a more attractive physical environment will be required. The implication of this is the need for up-front investment in establishing a quantum leap in quality that will result in increased demand, which may in itself lead to increased sales values and a greater likelihood of achieving the sales profile that will be required by developers.

Such investment is likely to be at risk. Whilst it will improve the opportunity, there is no guarantee that it will increase values to the extent that such expenditure can be clawed back from increased sales values following implementation. Without such investment we consider there would need to be a significant change in market conditions for this location to represent a competitive offer to the development market.

In viability terms, the challenge for the area as a whole is to establish whether the anticipated increase in retail/commercial floorspace has the capability to contribute to the investment requirements that will be needed to develop a sustainable mixed use town centre, with the critical mass of residential development and services needed to establish the Basin as a viable place to live.



5. Participating Organisations

5.1. Participants

Approaches to participate in the SMT exercise were made to national housebuilders (including those known to be active in the area) and a selection of the landowners. Those who agreed to participate in the exercise included:

- Aveley Property Holdings
- Barratt Homes (Eastern)
- Bellway
- Berkeley Strategic
- Bovis
- Capital Shopping Centres
- Churchmanor
- Countryside
- Crest
- Hollybrook
- Land Securities
- Morgan Sindall
- Muse
- Persimmon
- Redrow
- United House
- Weston Homes

In addition, given the scale of development and changes to Government policy affecting the funding and delivery of affordable housing, the Homes and Communities Agency (HCA) were also approached. One Registered Social landlord (RSL) also spoke to us.

Some organisations declined to take part in the process. The reasons given for not participating were:

- The area is not considered a suitable opportunity at present.
- The area is considered a low investment location.
- The organisation is not currently active in the area.
- Conflict of Interest.



From a RSL perspective, our invitation to participate in the exercise was declined by one who said that it was best directed at the major housebuilders, but that they would support the development proposals and would be keen to participate in any affordable housing opportunities that may arise.

5.2. Information Pack and Questions

All organisations were written to and provided with a letter of introduction to the study. A briefing pack was also supplied, containing information on the study area and the scale of ambition. This included a series of plans showing:

- existing land uses;
- constraints to development
- town centre concept plan; and
- location of potential residential development areas and development densities.

Sixteen questions were also posed and these formed the basis of discussion. The questions were:

- 1 What are your perceptions of Lakeside as a potential location for residential and residential/mixed use development in general and for specific types of residential development?
- 2 Currently, would you expect residential values in Lakeside to be less, similar or above comparable residential values in the local housing market?
- 3 What minimum quantum of residential development, whether stand alone or in a mixed use format, would be required to stimulate house builder interest in the short term (next 5 years)?
- 4 How does the Council's longer term aspiration to transform Lakeside into a Regional Town Centre impact on your perception / and potential values. Do you think there may be any scope for creating a new housing market to reflect the town centre location?
- 5 How much residential development and residential/mixed use development do you think will be achievable over the longer term (5-10, 10-20+ years)?
- 6 What will be the critical factors in generating development value at Lakeside (e.g. land use mix, infrastructure provision, public realm, accessibility etc)? What are the critical risks?
- 7 How do the particular physical constraints at Lakeside (e.g. segregation from surrounding areas owing to cliffs, the presence of electricity pylons) affect development value?



- 8 Are the public realm and transport proposals illustrated sufficient to support the scale of transformation sought?
- 9 Where residential development is unviable or only marginally viable what measures would need to be in place to enhance viability?
- 10 How could the local authority assist in creating the right conditions to attract residential development as a viable option? (e.g. planning policies, infrastructure investment etc)
- 11 Where within Lakeside would do you think you could achieve greatest value in the short term?
- 12 What are your views on the suggested density and mix of development?
- 13 What would be the essential pre-conditions for your company to invest in housebuilding at Lakeside?
- 14 Across the Lakeside Study Area as a whole, what amount of residential development (build rate per annum) do you think the market could accommodate (in the next 5 years)?
- 15 What elements of the proposed regional town centre would help to drive up market values and thus the likelihood of the area being attractive to residential development?
- 16 How will the Council's proposed CIL charge and affordable housing requirements impact on viability?

The letter of invitation and information pack is presented in Appendix A.



6. Key Messages

6.1. Introduction

This section of the report presents the main findings and conclusions from the interviews undertaken. It is broken down by landowner and developer to distinguish between their relative interests. We also include reference to discussions with the HCA and RSLs as appropriate. The summary conclusions and recommendations for Council action are based on comments made by interviewees. They will need considering through the production of the Site Allocations Issues & Options Consultation DPD and weighed up against the findings of the parallel technical studies currently being undertaken.

6.2. Developer / Housebuilder Responses

6.2.1. Perceptions

Perceptions of the study area as a location for market housing are mixed, but are best summarised by one respondent who said that *‘a wholesale change in the area would need to be a pre-requisite of any significant interest or market for residential development at Lakeside’*.

Of those that thought it a potential location for development, it was stressed that it would need to be attractive for family housing rather than just flatted development to be viable in the short to medium term. And even then, it was not considered to be a prime location: some thinking that values would be slightly lower to those in Chafford Hundred, which is now has an established market demand

Some developers suggested that there are other more attractive and available sites in Thurrock for housing in the short to medium term. This is of particular relevance given the draft emerging National Planning Policy Framework (NPPF). Although not yet a statement of policy it does reflect the direction of travel. This requires a five year supply of land for housing plus twenty percent (i.e.: six years supply). The question for the Council is thus whether Lakeside can justifiably fall within the current five year supply or whether it should be phased for a later period.

Mixed uses are considered to only work in an established urban context with good public transport provision and local services. Equally, flatted development is only considered to work around good transport hubs. It is also considered that there is a good supply of flatted development in this area (including East London) and it thus might be a more attractive location for families looking for better value for money outside of London. Proximity to the M25 and railway services were seen as a potential selling point, but at



the same time, concern was expressed that, given the level of congestion, potential buyers may have difficulty in accessing the area at busy times and so would look elsewhere for housing. And, without strong investment in the public realm and provision of social infrastructure, this might not be a place where people want to buy anyway. Improving the quality of the public realm and creating a strong sense of place were key messages coming from most respondents. Going hand in hand with this is the need to create a walkable environment, with good links to public transport provision.

These findings are based on discussions with those organisations participating in the exercise. But it is equally important to report on the reasons given by those organisations that declined to take part. One housebuilder responded that Lakeside is too far away from their office but, even if that was not the case, they do not consider Thurrock as a whole to be a 'prime location'. Investment here would not fit with their business model. And although Berkeley Strategic participated, quotes made by the Chairman of Berkeley Homes Urban Renaissance¹⁶ make for interesting reading. Despite acknowledging that a long term view needs to be taken when looking at major regeneration projects, such schemes are not considered to be economic outside and to the east of London (e.g.: in Thurrock).

Extract from Planning Magazine: The Money List 2011, 09/09/11

John Anderson, chairman of Berkeley Homes Urban Renaissance, says the group has maintained its investments in regeneration and will be looking for fresh opportunities, most likely in London. "At Kidbrooke and Royal Arsenal we did not have to be committed to further investments in the past year but we chose to be, because in regeneration you have to take the rough with the smooth for long-term profits," he says. "You have to take a view over 20-30 years and we will still be looking for regeneration opportunities to keep up a flow of projects."

Anderson says London is the most attractive place for regeneration because of its high property values. "The costs of a regeneration project do not differ very much around the country, but it is more likely in London that the returns will cover those costs without needing some third party funding from the government or a registered social landlord," he says. "But you don't have to go very far to the east of London for regeneration to be uneconomic."

¹⁶ Source: Planning Magazine, 09 September 2011, The Money List 2011



6.2.2. *Rate of development*

On the whole, respondents suggest that a developer might build out at the rate of about 50 units per year. This is entirely sales led: presently, developers tend to be selling one unit per week per development site. If two or three sites were being built out concurrently, then it might be possible to build out at a rate of about 150 units per year. But, given current physical and environmental constraints, complex land ownerships, the presence of existing uses on site and the quality of the public realm, it might take up to five years for development to come forward. Upfront work is thus needed to start putting the right conditions in place for development. This may require a proactive approach by the Council in partnership with the existing or future landowners.

6.2.3. *Scale of development*

Responses suggest that it is important to generate critical mass to support public realm and social infrastructure. A scheme of 500 units might be needed. This could potentially kick-start development but, if no further residential was to come forward, this might be able to stand on its own. There is a risk that small scale sites and developments would be isolated, and surrounded by a poor quality environment, which would not be attractive to buyers.

Respondents suggested that townhouses and small family homes would be appropriate. Some flats could come forward as part of a wider mix, but it was considered that development in this location would not exceed three or four storeys in height.

Assuming the right conditions were in place, it might be possible to deliver 300 – 500 units within the first five years of implementing any plan for change. Judgement is reserved on the overall scale of change, though the preference for family homes as opposed to flats and mixed use developments would suggest that the overall quantum of residential units that could be accommodated in the study area would be less than 3,000. It was suggested that the capacity for residential development might perhaps be closer to 1,500-2,000 units.

6.2.4. *Deliverability*

There is a high level of scepticism that the residential values in the area and amount of funding required would be available to secure the level of transformational change required.

Many respondents suggested that existing use values are high and thus residential is currently unviable on its own. A food store would thus help generate value. But, ideally,



this would need to be accommodated in one location to maximise its impact on values, and thus only benefits one site. The issue then is how to deliver other sites.

Respondents suggest that viability can only be improved by cutting costs or increasing sales values. On the former, the cost of land and the structure of payments will be critical. Landowners would need to accept deferred payments and ideally share the risk rather than take guaranteed payments. There will be pressure on developers to keep design costs and s106 obligations to a minimum. On the latter, sales values will only increase once it is evident to buyers that transformation of the study area into a Regional Town Centre is being delivered and demand consequently increases.

Perhaps unsurprisingly, developers responded that reducing the affordable housing requirement might be necessary, and suggested that the Council should adopt an open book policy. However, affordable housing was also seen by some as helpful to cashflow and turnover, even if profit margins were minimal. Greater certainty on wider s106 / infrastructure requirements would also be required by developers at an early stage.

A significant improvement in values will be achieved only by major investment in both transport and social infrastructure. A number of respondents questioned whether the study area could become an aspirational location for housing rather than remaining a low cost area, providing value for money.

6.2.5. *Physical constraints*

The quality of the environment, the transport network (and associated level of congestion) and existence of pylons were all seen as negatively impacting on the quality and perception of the place. Given the harsh urban environment, buyers looking for a family home are unlikely to be attracted to the area, which would suggest that initial development phases would need to be apartment led. However, as noted above, respondents are not convinced that there is a market for apartments here. So, efforts to improve the quality of the environment, public realm and transport infrastructure must be prioritised. Without this, the market is likely to be depressed, thus further reducing the scope for change and development. But, there are costs associated with this. In particular, the costs of moving or undergrounding the pylons is considered to be prohibitive, and would necessarily have to be factored into any planning obligations being imposed on developers, or mitigated by other public realm improvements.



6.2.6. *Role of the Council*

It is essential that the Council can demonstrate the deliverability of the transformation into a Regional Town Centre, to give the market the confidence to invest and convince potential buyers of the longer term benefits of the location.

Housing needs to be part of a comprehensive approach to land use and infrastructure change. Nearly all respondents suggested that a clear, credible and deliverable masterplan is needed for the area. This will help the market 'believe' in the potential for change. To invest in this area, respondents suggest that developers need the confidence and certainty that a masterplan would bring. This should set the long term framework for change and, combined with efforts to improve the quality of the public realm, delivery of social infrastructure, and rationalisation of the highway network, are all seen as key initiatives which would help change the image and attractiveness of Lakeside as a place to live. The policy approach will need to ensure that isolated pockets of development do not come forward that cumulatively fail to change the overall character of the study area.

The location of the food store (as referenced above) is likely to be critical in securing the first phase of residential development, but if values do not improve in the area, then further incentives will be needed to encourage additional residential phases.

Respondents suggested that the Council should provide a clear steer on what development could come forward. In order to mitigate delivery risks and avoid any late objections to proposals, the Council should engage with statutory agencies to ensure there are no surprises. Flood risk for example was highlighted by one respondent as requiring a clear policy position.

Also, given the complex and fragmented landownerships in the study area, it was suggested that Joint Venture partnerships might be encouraged.

6.2.7. *Locations for residential development*

The majority of respondents suggested that the land to the north of the A1306 offers the greatest potential for creating a residential development where it might be possible to generate a return attracting the right type of investment. It might be of a scale to generate a sufficient mass of development, and would be able to take advantage of green space and water bodies, where an attractive environment for a mix of more aspirational family housing could be created. Additionally, development on this site would not necessarily be dependent on wider change occurring elsewhere. Although relatively isolated from the rest of the study area, improved linkages, especially for pedestrians and cyclists, would



need to be incorporated in any masterplan. However, it is unclear whether this site would be viable in the short to medium term without a foodstore.

Elsewhere, land around Alexandra Lake was seen as being a good location for housing, as sites overlooking water tend to be attractive to buyers. But, this needs to be seen in the context of the existing uses and underlying land values. Sites fronting the Lake were seen as probably the one location where flatted development might work. There was no or limited appetite for high rise development and limited scope for flats elsewhere.

The Junction was also seen as a possible location for residential development (although after the Arena Essex site and around the lake in terms of attractiveness), but concern was expressed that unless a larger area of land was considered, this could result in an isolated residential development, surrounded by retail and highways. Mixed use developers were not as sceptical about this location as the 'pure housebuilders', but even then, it was noted that this would still be a risky site if it was unable to sustain family housing in the medium term.

6.3. Landowner Responses

Discussions took place with three of the landowners. Meetings were held with these organisations in agreement with the Council as they represent the major landowners at the heart of the study area, whose land is crucial to achieving the vision for change and development.

Points raised during discussions are summarised below:

6.3.1. Viability

Respondents suggested that high existing use values in the area mean that residential development is unattractive. Equally, it is an unattractive location for other non-retail uses, such as offices, hotels and conference centres.

The viability of housing development as set out in the existing TTGDC Lakeside masterplan¹⁷ is questioned, even when excluding affordable housing and discounting the value of the land. To the south of the A1306, respondents commented that they could not see any value in residential or other non-retail uses on those locations identified in the concept plan (Figure 4). And, even taking a longer term view of transformation, it was questioned whether any residential development would be of sufficient value to help

¹⁷ Benoy et al for TTGDC, November 2008, Lakeside and West Thurrock Masterplan



transform the area. The view was expressed that residential here would likely be a low value and 'sub-optimal'.

6.3.2. *Residential locations*

Although the vast majority of developers identified land to the north of the A1306 as the best location for residential development, some scepticism was expressed during discussions with landowners. In particular, it was noted that the land-take for open space, education and community facilities would result in a more limited scope for residential development. Housebuilders highlighted the importance of providing a convenience retail offer here to help drive values and just as importantly cashflow, but comments raised during the discussions with landowners suggest that they would be opposed to any dilution of the retail offer by allowing or relocating any significant commercial uses here

It was also commented that land values had fallen significantly in Thurrock over the last five years, and this would rule out the diverting or undergrounding of the overhead pylons that run alongside the land to the north of the A1306. Retention of these would further impact on the amount of developable land available for residential uses here.

The potential for waterfront living overlooking Alexandra Lake was explored. However, it was considered that this would require significant redevelopment. Respondents suggested that instead of redevelopment, the existing buildings could instead be reconfigured and refreshed. This would accommodate changing retail needs and demand, without having to amend the footprint of the buildings. But, this would then limit the potential for housing development.

The perception of traffic congestion is recognised to be a problem for the area, but it is unlikely that current proposals will generate sufficient funds to improve the traffic conditions.

6.3.3. *Role of the Council*

Respondents suggested that the Council will need to take a clear policy position on what it is they are seeking to achieve in the study area, without which the opportunities for change might be lost: particularly if they are in receipt of multiple planning applications for sites in the area.

Transformation of the area might require a series of major land swaps, for example, relocating Tesco and or the cluster of retail warehouse units around the Ikea store. If moved to a Greenfield site (e.g.: to the north of the A1306), substantial areas of land could then be freed up for residential development. This might allow for a more



imaginative approach to redevelopment around the lake and the shopping centre, but would require significant intervention and incentives. It would also require the Council to bring all of the landowners together, possibly via an investment / residual value equalisation agreement.

Concern was also expressed about the limits to retail growth (to 2019) imposed by the East of England Plan and that this might need updating to reflect market conditions. Any changes, or further evolution of the concept plan through the Site Allocations DPD, would need to present the retail evidence for this. This would need to be considered in light of existing national policy and any changes emerging in the form of the NPPF and the Localism Bill.

6.4. HCA / Registered Social Landlords

Given the scale of housing envisaged and recent changes to funding announced by central Government we also sought to engage with the HCA and RSLs active in the area. One RSL agreed to participate in the exercise. However, given that RSLs will often come on board once a developer has invested in the area, their responses, whilst important, will not determine the deliverability of the scale of transformation set out in the Core Strategy.

Many of the responses made by the RSL reflect those also made by the developers: it should be an area for family housing, the provision of social infrastructure is essential, there is a recognition that to make development viable the affordable housing component is likely to be negotiated down and public transport facilities need improving.

Land to the north of the A1306 was seen as the best opportunity to deliver new homes, being able to generate the scale and mass of development to create a small community. As part of this, amenities and infrastructure must also be provided, without which development might not be attractive to potential buyers.

The scale of change (up to 3,000 homes) was seen as ambitious. The respondent commented that the vision for change must be deliverable.

When asked about the role of the public sector concern was expressed about land ownerships, limiting the ability of the Council and the HCA to kick start development.

When discussing with the HCA, it was noted that the scale of residential development outlined in the Core Strategy is not specifically mentioned in the Councils LIP (Local Investment Plan). The evidence base for development was thus questioned and, although recognised that circumstances change over time, lack of reference in the LIP means that Lakeside is not considered a priority area for the HCA at present. This does not mean



that the HCA would not consider funding in the area. But if they did, evidence of need and demand for housing would need to be provided. At present, funding is limited, but it was considered that the scale of change might not come forward until the medium term, by which time economic conditions may have improved and thus more funding might be available to help deliver change.

6.5. Conclusions

Discussions raised the following points which should be considered in the evolution of the Site Allocations Issues & Options Consultation DPD:

6.5.1. Land Values and Deliverability

- The study area is perceived to be a poor location for residential development and is generally not one that any of the main housebuilders had previously actively considered for residential. There are strongly held views amongst a minority that there is no market for residential in this location.
- The Study Area is an area with established existing commercial use land values, often at or above likely residential land values with consequently little incentive for land owners to switch to residential uses. This will make it difficult to achieve residential development in the short term, unless or until the improvements are sufficient to drive residential land values higher. It must then be questioned whether there will be any redevelopment here without a significant change in land values, or incentives for change to take place.
- In the short term the most likely prospect for achieving residential development would be as part of a comprehensive scheme including a food store. The store would generate sufficient cash flow and revenue to forward fund infrastructure in advance of housing. However, this may only benefit one location. Two possible sites for a large food store were considered in the discussions we had with developers and landowners, as indicated on the concept plan provided to us (Figure 4). These were at The Junction and to the north of the A1306. In the medium to longer term, other sites for the provision of convenience retail floorspace may come forward. . We understand that recent work investigating retail capacity undertaken for the Council by Roger Tym & Partners suggests that Lakeside could accommodate 5,000sqm of convenience floorspace by 2021 and 5,800sqm, by 2026¹⁸. We also understand that the planning application submitted by CSC for expansion of the existing Lakeside shopping centre includes some convenience retail

¹⁸ Source: Thurrock Borough Council, January 2012



floorspace (potentially up to 2,000sqm)¹⁹). This will reduce the quantum of convenience floorspace that it might be possible to provide on other sites in the first five years and therefore, should this application be permitted, it could have a significant impact on the value and attractiveness of the other sites for residential development in the short term. The Council thus need to be very clear as to where the convenience retail floorspace should be located to best deliver its objectives for change and transformation in the study area.

- Further residential sites will be dependent upon rising values through provision of transformational change in transport, public realm and the provision of social and community infrastructure. In particular, improvements to the quality of the walking environment, with links to public transport provision, are seen as important components of the transformation. There is a very real danger that residential development will stall after the first phases and will leave isolated pockets of development with attendant problems over time.
- The proximity to the M25 and surrounding railway lines, particular Chafford Hundred station, are viewed as good selling points, but conversely, congestion, primarily associated with the M25 and number of visitors to the shopping centre, is considered a negative. This will impact on the attractiveness of new homes in this location to potential house buyers.
- Land value issues, development and infrastructure costs may lead to planning obligations being negotiated. The ability to deliver affordable housing targets as established in Council policy may thus be compromised.

6.5.2. Residential location and type

- Most respondents suggest that any residential development should take the form of family housing: flats, high rise and mixed use development (i.e.: flats above shops) are unlikely to work in this location in short to medium term. This has implications for the quantum of development that might be achievable as family housing implies a lower density.
- A development of at least 500 units is likely to be needed to generate critical mass and avoid the risk of creating isolated residential communities (see above).
- The most potentially viable and attractive location for housing is recognised to be the site to the north of the A1306, but this is partly a result of its self containment which does little to benefit changes to create a Regional Centre. It is also currently within

¹⁹ See TTGDC application no.: 11/50433/TTGOUT



Green Belt and subject to other constraints, including land fill and the proximity of power line pylons: all of which impact on the value and attractiveness of this as a location for residential development. It is also not clear that the site would come forward in the short term for residential without a food store being part of the mix because of the scale of likely upfront infrastructure and utilities costs. Further, should the pylons remain in-situ, the available area of land for residential and other associated development will be reduced, thus limiting the overall capacity of this site. The pylons could be diverted or buried to increase the net developable site area, but the costs associated with this are likely to be prohibitive. The allocation of this site may also be subject to a wider Green Belt Review

- Land around Alexandra Lake might be an attractive location for development – and one of the only places where flatted development might work. However, the existing uses and associated values make this an unlikely proposition. There appears to be no financial incentive to replace existing viable commercial space with lower value residential.
- The Junction could come forward as a potential residential / mixed use site, but should also be expanded to include adjacent land (including the SEGRO Industrial Estate: see site 25 on the land ownership plan) to ensure sufficient frontage to create a viable scheme.
- It is difficult to get a view on the possibility of a development site comprising the retail warehouse around Ikea. None of the respondents believed it would happen, and some expressed concern about the dilution of retail uses, suggesting they should remain concentrated within the Basin.
- The scale of change is seen to be ambitious: a more realistic scale of development might be around 1,500 – 2,000 units. As suggested by most respondents, a comprehensive masterplan approach for the area is necessary. The rate of development will be driven by sales, which currently average around one per week. Should three sites be developed concurrently, it might be possible to deliver about 150 units per year.

These messages amplify the conclusions from our initial assessment of viability and delivery issues (summarised in section 4 above). This raised a number of issues, the biggest of which appeared to be (a) the existing investment value compared to development value, and (b) the lack of services and facilities for residential uses in the basin.

The viability assessment also indicated that there would be a much greater prospect of development on the site to the north of the A1306 than anywhere else, primarily because



this provides the scope to create a new residential environment independent of any changes elsewhere, in particular, competing and currently viable commercial uses in the heart of the Basin. It was considered that some limited scope for development might exist around Alexandra Lake and at The Junction site, but that these (a) are severed from existing residential and community provision and (b) still have significant delivery issues. Much of the study area has high existing use values that will not be overcome by the prevailing residential values in the area. The assessment indicated that the delivery of 3,000 new homes is an ambitious proposition given the existing uses on the site.

6.6. Action for the Council

It is important to caveat any conclusions to be drawn from this study by emphasising that the views of those interviewed are inevitably a snapshot, and one that is heavily influenced by current market conditions. The transformation of the Lakeside Basin is a long term objective of the Council and one it acknowledges may take 10-15 years. However, the views expressed and recorded here are more short term, and it is difficult to predict market demand and values beyond a five year horizon. Notwithstanding this, there are some important issues that need to be addressed to ensure that if this study were to be repeated in five years time some of the answers will be different. In particular, housebuilders will need to see evidence that a comprehensive plan for change is being implemented: one that will help improve perceptions and strengthen potential market demand and values. To this extent it may be necessary to accept that rather than a short term catalyst for change, the desirability of the Lakeside Basin as a residential location will be the ultimate long term test of its successful transformation, through investment in the public realm and infrastructure.

The discussions have drawn attention to a number of actions that the Council should lead on, and which developers see as essential to helping create the conditions to deliver the scale of change outlined in the Core Strategy.

Fundamental to this is the production of a deliverable masterplan that takes a comprehensive approach to development rather than looks in isolation at different sites. The masterplan needs to provide certainty and clarity for developers; particularly in terms of what infrastructure works will be provided, and when. Improvements to the quality of the public realm and the creation of a sense of place are essential to changing the image and perception of the study area, not only in terms of making it attractive to developers but also a place where their customers will want to live.

The masterplan and or emerging Site Allocations DPD need to provide a clear policy direction on the role and function of the Regional Town Centre and its relationship with



Grays. Respondents commented that the creation of an attractive place requires a whole range of supporting social and community facilities. But there is a risk here that the objectives for Lakeside will be hampered by the need to split traditional town centre functions with Grays, thus limiting scope for real change. So clear policy guidance is needed on what uses should be located where.

Viability issues need to be overcome. In the short term, the location of a food store needs to be considered carefully to ensure its value is used to promote the Council's ambition. The catalyst this will provide can only be used once, but decisions on where this should go should not be at a loss to wider change in the long term. Again, this relates back to the need for a comprehensive approach to change, which will best be set out in a masterplan for the area.

And related to issues of viability, the Council should provide advice on funding and delivery arrangements, as well as greater clarity on the scope and level of s106 / affordable housing / CIL requirements for the area. There need to be some clear incentives to encourage housing to be developed here, rather than other potentially 'better' or more deliverable sites within the Borough. The Council need to consider very carefully what infrastructure they think should be delivered through s106 and what should be left to CIL.

The Council also have an important role to play in working as a broker between developers and the statutory agencies and in bringing the landowners together. Without their cooperation, it is unlikely that the scale of transformation sought by Council policy will be met. It will be important to maintain a dialogue with all and for them to be able to see long term benefits of co-operation in improving values.

In summary, the Core Messages emerging from the SMT work are:

- The process of delivery must be sustained by on-going and proactive engagement with all stakeholders and key players with a clear business strategy to deliver.
- There is a need for a political commitment by the Council over a sustained period to set up and sustain robust delivery arrangements including credible partnership arrangements.
- There is a strong emphasis on the Council's willingness to use all its powers and assets as appropriate to delivery transformation.
- The avoidance of short-termism that could prejudice the vision for Lakeside will be crucial.



- Incremental change over time must be managed within the framework of a Masterplan allowing for flexible delivery by the market.



A. Information Pack and Plans

Ref:
Date: 9 August 2011

Direct Dial: 01375 652274
Fax: 01375 652713

Email: rhatter@thurrock.gov.uk

XXXXXXX
XXXXXXX
XXXXXXX
XXXXXXX
XXXXXXX

Dear XXXXXXXXXX

Lakeside Regional Centre Study Area Soft Market Testing of Housing Development Options

Thurrock Lakeside is an area of major transformational change. The Council aspires to create a regional town centre here, providing a mix of new land uses, including a major expansion and improvement to the retail offer, new homes and a full range of supporting facilities. The Single Issue Review of the East of England Plan and the Council's emerging Core Strategy create the framework for provision of up to 3,000 new homes as part of the vision for Lakeside over the next twenty years.

The Council is now taking the vision forward through the Local Development Framework and is proposing to publish a Lakeside Regional Centre Inset Plan within the Site Allocations Issues & Options Consultation DPD later this year. As part of the evidence base for this we have now appointed consultants SKM Colin Buchanan, in association with Mike Lambert Associates, to carry out a Soft Market Testing (SMT) exercise with leading developers and housebuilders.

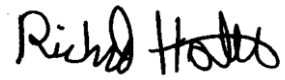
The purpose of this is to seek input from the market as to what it considers would be the key factors in creating the conditions to make new housing an attractive and viable proposition at Lakeside, providing the Council with an insight into how prospective developers might approach the delivery of particular sites or options, and what issues and constraints will impact upon the viability of the alternative development options for this area.

The SMT exercise will take place through August to inform the ongoing evolution of the Lakeside Inset to the emerging Site Allocations DPD. Please note that a separate borough-wide Strategic Housing Land Availability Study (SHLAA) is being undertaken in parallel by GVA to identify potential sites available for housing development. The two studies have very different objectives.

We would very much welcome your involvement in the SMT Study, which will be important in ensuring we can create a strong and deliverable plan for Lakeside. I enclose a Briefing Note and questionnaire which will be followed up by a face to face meeting at your offices lasting about an hour. I do hope your company will be willing to taking part, if so, please advise Jon Herbert at SKM Colin Buchanan, who is Project Manager for the study, by phone (020 7053 1492) or email (jherbert@globalskm.com).

In the meantime, should you have any questions, please do not hesitate to contact me.

Yours sincerely

A handwritten signature in black ink, appearing to read "Richard Hatter". The signature is fluid and cursive, with the first name "Richard" and last name "Hatter" clearly distinguishable.

Richard Hatter
Team Leader
Strategic Planning Policy

Thurrock Lakeside: Soft Market Testing of Housing Development

Briefing Paper and Questionnaire

- 1 Introduction
 - 1.1 Colin Buchanan, in association with Mike Lambert Associates, has been appointed by Thurrock Council to carry out a Soft Market Testing (SMT) exercise with locally active residential developers.
 - 1.2 The purpose of this is to seek input from prospective developers in relation to:
 - The feasibility of delivering the Council's development objectives
 - The capability of the market to deliver what is required by the Core Strategy and emerging spatial options for Lakeside
 - The capacity of the market to achieve the scale and nature of development sought in the timeframe envisaged
 - 1.3 The SMT exercise will take place through August to inform the ongoing evolution of the Council's Local Development Framework and the Lakeside Regional Centre Inset Plan to be set out within the emerging Consultation "Issues and Options" Site Allocations DPD.
 - 1.4 This briefing pack presents an overview of the aspiration for change in Lakeside and the emerging options that have been developed by the Council. It then concludes by posing a series of questions that we would like to explore with you directly.
- 2 Background
 - 2.1 The Lakeside shopping centre and adjacent retail parks are, taken together, one of the largest single shopping areas in Europe. However, Lakeside is now facing competition from Bluewater and the soon to be open Westfield centre in Stratford.
 - 2.2 Following the Thurrock Single Issue Review of the East of England plan the planning policy framework now supports the transformation of the northern part of the Lakeside Basin into a new Regional Centre. A plan of this area is attached.
 - 2.3 Transformation of the Lakeside Basin into a regional centre will include the following:
 - Up to 50,000sqm net additional comparison floorspace (by 2019);
 - At least 4,000sqm net convenience floorspace;
 - Up to 3,000 new dwellings;
 - Employment and other services to broaden the employment base; and
 - Commercial leisure floorspace, including food and drink uses, consistent with the function of a regional centre.
 - 2.4 At present, the Lakeside basin is a large disparate area, with little sense of place and no overall coherence. The current format is dominated by car traffic and complicated by trips through the Basin by commercial vehicles. Pylons traverse the area; it has limited highway capacity and poor linkages to surrounding communities.

-
- 2.5 While there is some derelict and underused land within the Lakeside Basin, which could potentially be used for housing, the Council's approach is not simply to retrofit housing development onto the remaining sites. The Council wish to see a sustainable town centre emerge at Lakeside. An attractive centre, based on best practice place making principles, should be created that successfully integrates housing into the overall development, supported with community facilities in the most appropriate locations.
- 2.6 Spatial development options are being prepared by the Council and its partners that will set the framework for the transformation of the Lakeside Basin. These will form part of the Council's Site Allocations Development Plan Document. Enclosed with this note is a map of the site showing existing land uses and potential zones for residential development and/or mixed use development with a residential component.
- 2.7 The Council is undertaking an infrastructure study in parallel to determine the infrastructure needs associated with the redevelopment of Lakeside. However, based on the Infrastructure Study which informed the Council's Core Strategy, this is likely to include:
- Enhanced public transport connectivity (hoppla bus, park and ride, South Essex Rapid Transit, and West Thurrock Rail Station)
 - Upgrades to the strategic highway network (including Motorway junctions and enhanced access from A13)
 - Reconfiguration of internal road network
 - Implementation of an area wide urban realm strategy (including green space)
 - Decentralised energy network
 - Early years (pre-school) facilities
 - New Primary School
- 2.8 Thurrock Council is currently developing a draft CIL charging schedule, and potential implications of this will be discussed with interviewees, alongside the Council's approach to affordable housing delivery on the site.
- 2.9 Through responses to the questions posed below, the Council aim to get a feel for the view of the house building market on the conditions that would need to be put in place to facilitate residential and or residential/mixed use development at Lakeside; what form(s) that is likely to take (in terms of unit type, density and tenure). Respondents are encouraged to take account of the emerging vision for Lakeside, which includes the possibility of fundamental change and comprehensive redevelopment of parts of the Lakeside area over the next 20 years.

3 Attachments

- 3.1 Three plans of Lakeside are attached to this paper. These have been prepared by TBC to illustrate a potential development concept to support the longer term objective of creating a regional town centre. The purpose of the concepts is to generate debate and discussion about the future of Lakeside; they do not represent Council policy.
- Lakeside Basin Existing Uses (Plan A)
 - Potential Town Centre Concept for Lakeside (Plan B)
 - Potential Residential Areas (Plan C)
 - Potential Constraints (Plan D)
-

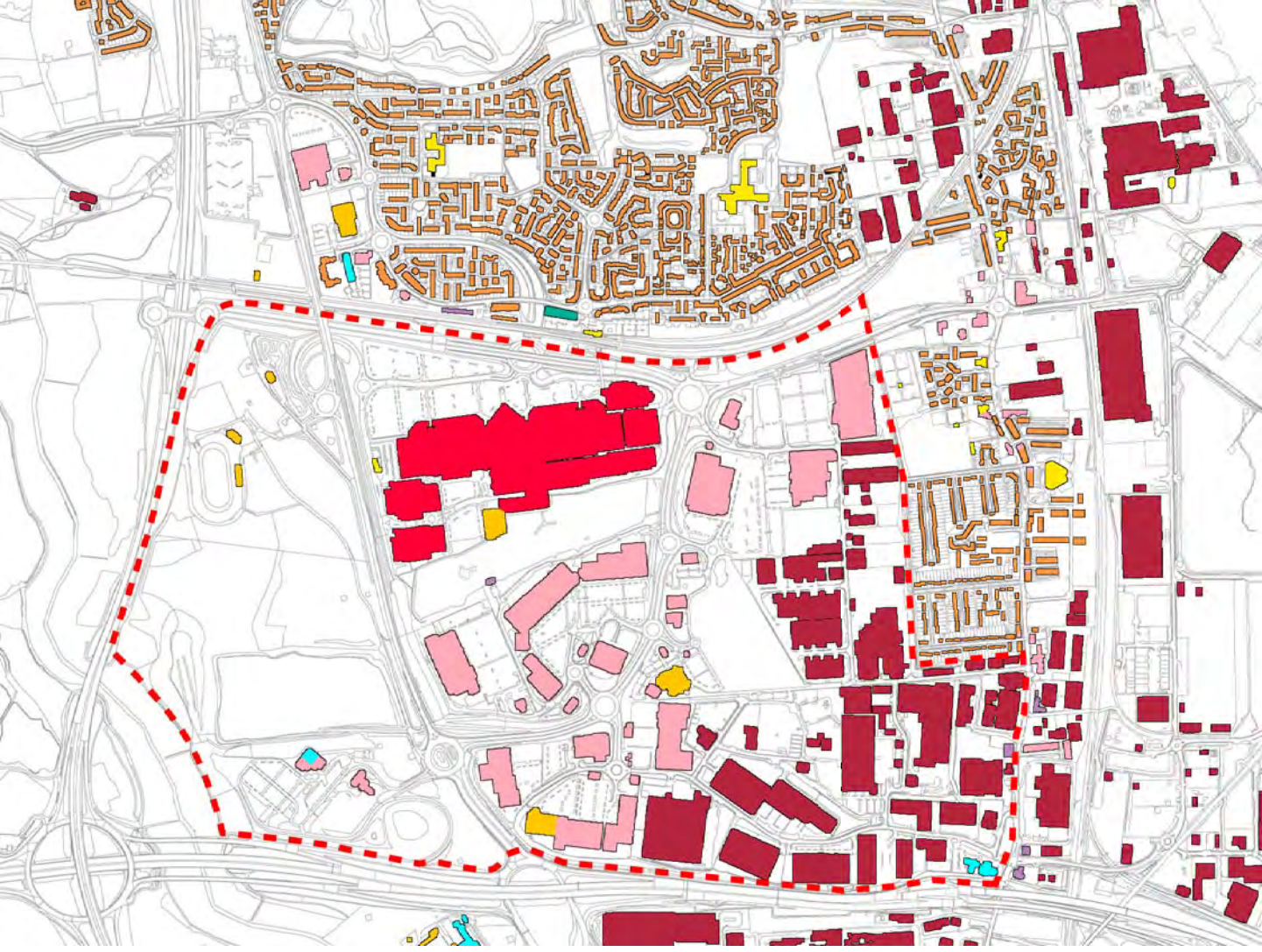
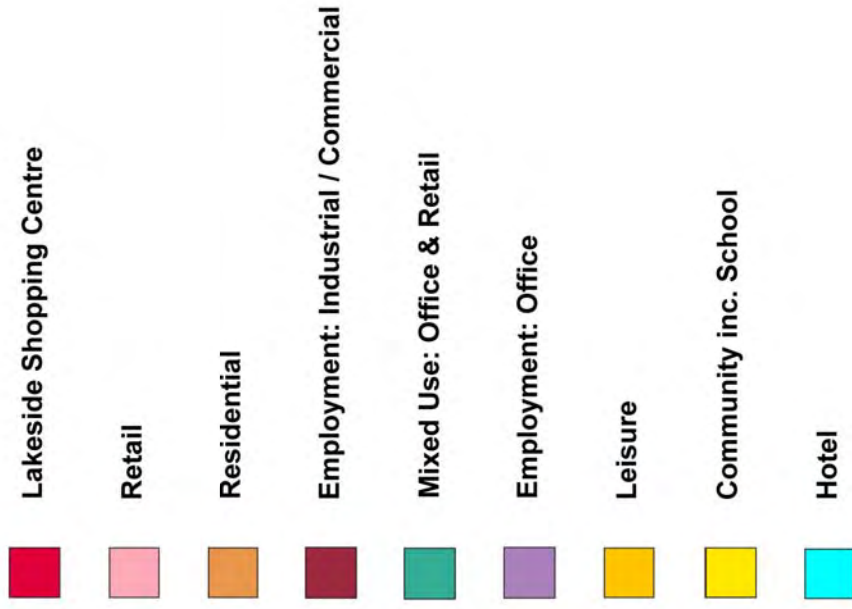
4 Questionnaire

- 1 What are your perceptions of Lakeside as a potential location for residential and residential/mixed use development in general and for specific types of residential development?
- 2 Currently, would you expect residential values in Lakeside to be less, similar or above comparable residential values in the local housing market?
- 3 What minimum quantum of residential development, whether stand alone or in a mixed use format, would be required to stimulate house builder interest in the short term (next 5 years)?
- 4 How does the Council's longer term aspiration to transform Lakeside into a Regional Town Centre impact on your perception / and potential values. Do you think there may be any scope for creating a new housing market to reflect the town centre location?
- 5 How much residential development and residential/mixed use development do you think will be achievable over the longer term (5-10, 10-20+ years)?
- 6 What will be the critical factors in generating development value at Lakeside (e.g. land use mix, infrastructure provision, public realm, accessibility etc). What are the critical risks?
- 7 How do the particular physical constraints (see Plan D) at Lakeside (e.g. segregation from surrounding areas owing to cliffs, the presence of electricity pylons) affect development value?
- 8 Are the public realm and transport proposals illustrated on Plan B sufficient to support the scale of transformation sought?
- 9 Where residential development is unviable or only marginally viable what measures would need to be in place to enhance viability?
- 10 How could the local authority assist in creating the right conditions to attract residential development as a viable option? (e.g. planning policies, infrastructure investment etc)
- 11 With reference to Plan C, where within Lakeside would do you think you could achieve greatest value in the short term?
- 12 What are your views on the suggested density and mix of development as set out on Plan C?
- 13 What would be the essential pre-conditions for your company to invest in housebuilding at Lakeside?
- 14 Across the Lakeside Study Area as a whole, what amount of residential development (build rate per annum) do you think the market could accommodate (in the next 5 years)?
- 15 What elements of the proposed regional town centre would help to drive up market values and thus the likelihood of the area being attractive to residential development?
- 16 How will the Council's proposed CIL charge and affordable housing requirements impact on viability? (Further information on both to be provided during interview)?

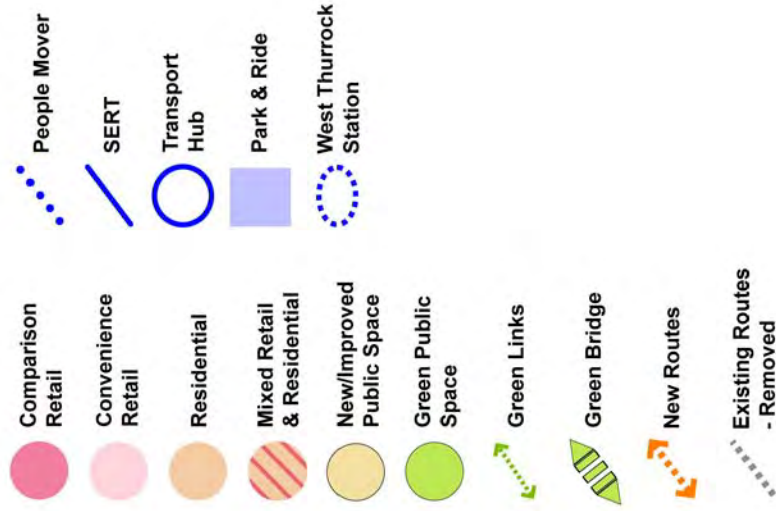
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Map A: Existing Land Uses

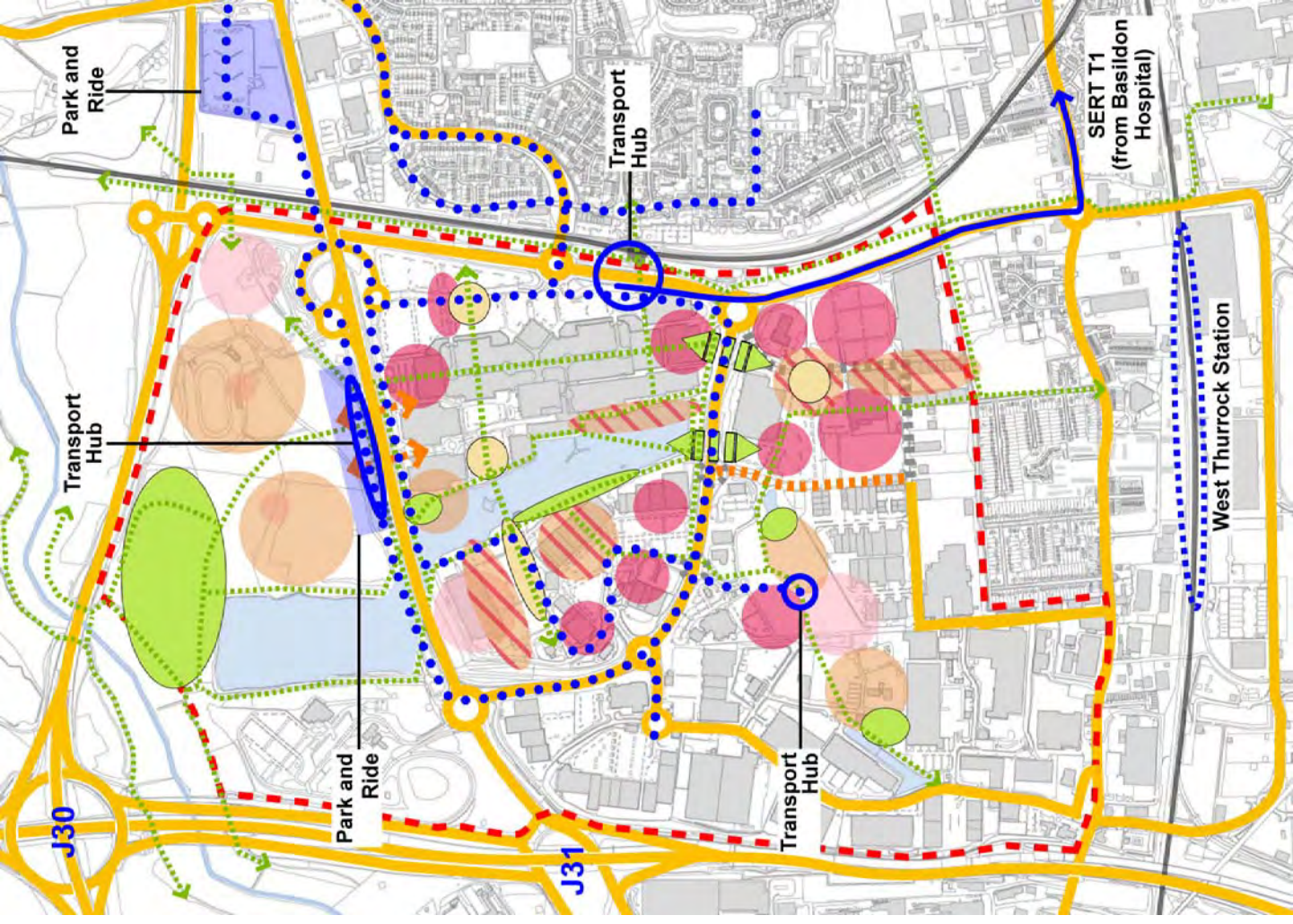
Key to Existing Building Use



Map B: Potential Town Centre Concept for Lakeside



Note: Draft conceptual plans are indicative only, they do not represent Council policy. Draft conceptual plans are presented for discussion, without prejudice



Map C: Potential Residential Areas

These potential areas, types and densities are a starting point for discussion:

A: 3 and 4 storey + flats over mixed use ground floor (at least 60dph)

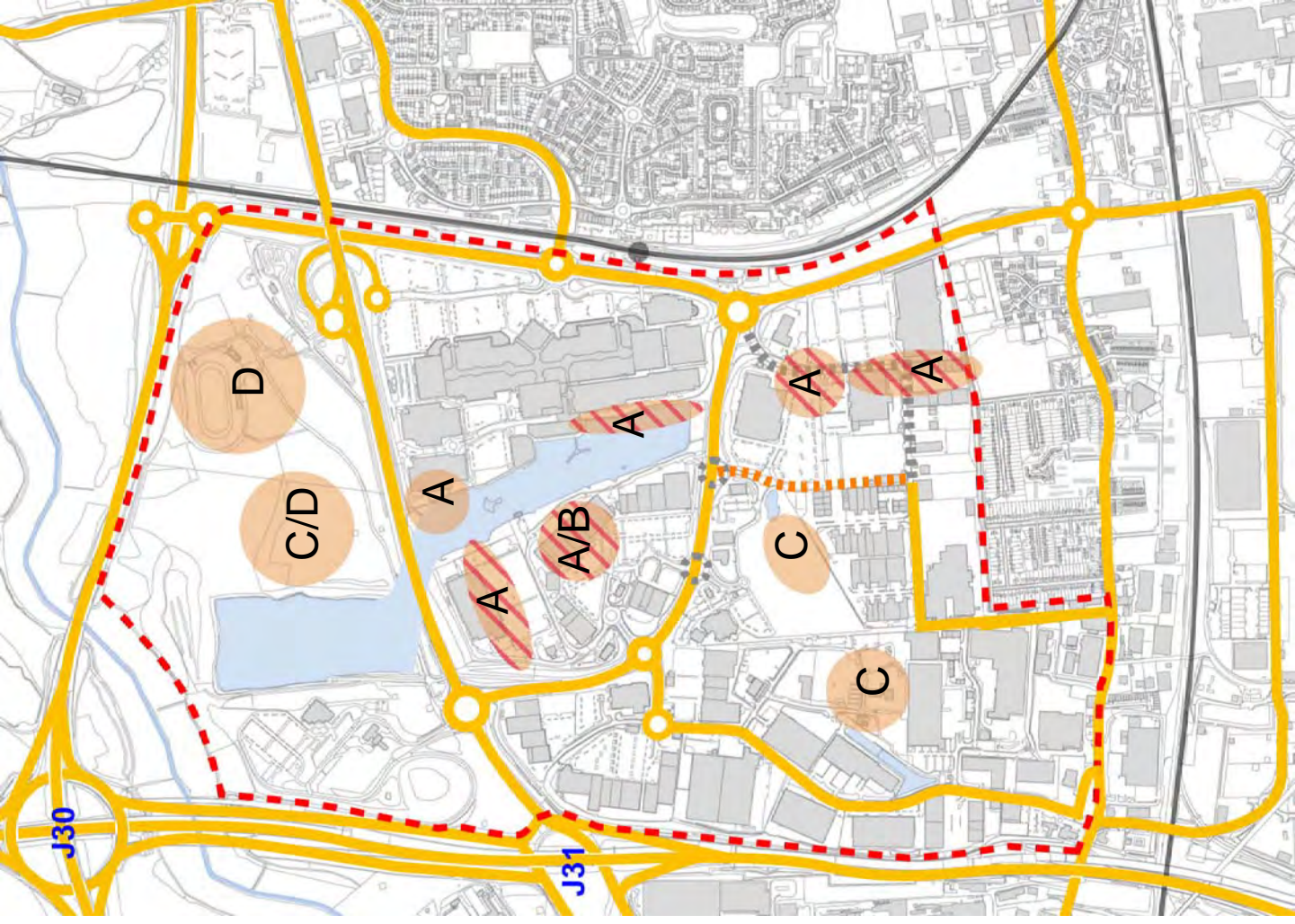
B: 3 and 4 storey + houses and flats (at least 60dph)

C: 3 and 4 storey houses and flats (min 60dph)














D: 2 and 3 storey houses and flats (at least 40dph)

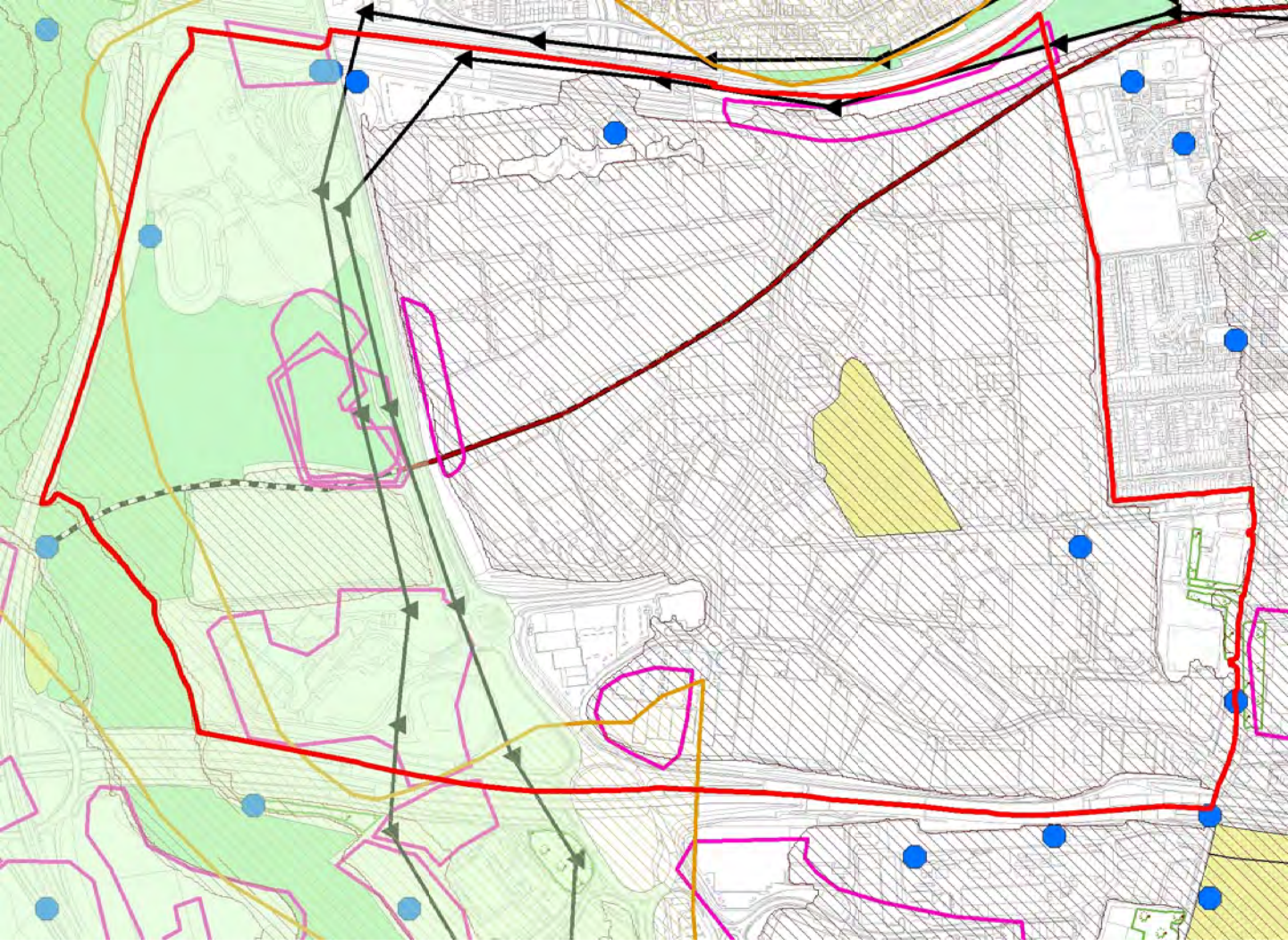


Note: Draft conceptual plans are indicative only, they do not represent Council policy. Draft conceptual plans are presented for discussion, without prejudice



Map D: Potential Constraints

-  Lakeside Boundary including Arena Essex
-  EHCRA Archaeology Point
-  Towers / Pylons
-  Overhead Line Routes
-  EA Landfill
-  GI - Proposed Strategic Green Links - Rural
-  GI - Proposed Strategic Green Links - Urban
-  Local Wildlife Sites
-  Potential Local Wildlife Sites
-  Grade 3 Agricultural
-  Tree Preservation Orders
-  Floodzone 2 (EA)
-  Local Plan - Greenbelt





B. Land Ownership Plan

Key to the land ownership plan:

01	Arena Leisure Enterprises Ltd	29	Stapleford (Lakeside) Ltd
02	Aveley Property Holdings	30	Stargas Nominees Ltd
03	B&Q Properties Ltd	31	Tesco Stores Ltd
04	Bondia Property Co. Ltd	32	The Junction Ltd Partnership
05	Capital Shopping Centres PLC	33	The Universal Tyre company (Deptford) Ltd
06	Costco Wholesale UK Ltd	34	Tip Europe Ltd
07	Daniel Donovan	35	Unknown
08	Unknown	36	EDF Energy Networks (EPN)
09	Graham Charles Rosoman	37	Anglian Water Services Ltd
10	Hanson Building Products Ltd	38	Equiom Trust Company Ltd
11	Ikea	39	Accor UK Economy Hotels Ltd
12	KMP Investments Ltd	40	Solus 32 Ltd
13	Lakeside Property Development Co Ltd	41	Legal and General Assurance Society Ltd
14	Lakeside Property Investment Ltd	42	GAF Heley (Properties) Ltd
15	Lancaster PLC	43	Pat (Pensions) Ltd
16	Land Securities	44	Mundays (733) Ltd
17	Mayhart Properties Ltd	45	UK Logistics Ltd (Nomine 1 and 2)
18	McDonald's Real Estate Ltd	46	S&B Commercials Plc
19	MG (West Thurrock Ltd)	47	A&J Mucklow (Investments) Ltd
20	MJL Holdings Ltd	48	Eastern Electricity Plc
21	Prudential Assurance Co Ltd (PRUPIM)	49	National Grid Gas Plc
22	Renault Truck commercials		Peter Joseph and Penelope Elizabeth Schmitz
23	Second Thames Land Ltd	50	t/a Hyper Property Co
24	Secretary of State for Transport	51	Alan David Bronze
25	SEGRO industrial Estates	52	Transmec Property Ltd
26	Shell Pensions Trust Ltd	53	Waterglade (W. Thurrock) Ltd
27	Sinnathamby Ratham Chandrakumar	54	Thurrock Shares 1 and Thurrock Shares 2
28	Spire (West Avenue Ltd) and Gibbons II Ltd	55	Nicholas James and Carol Lillian Dawson

