

TRAVEL GAINS AND ECONOMIC GROWTH ACROSS THE THAMES GATEWAY

A Key point summary of a JRC Report produced
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The KenEx Tram Group commissioned Jonathan Roberts Consulting (JRC Ltd) in 2025-26, to assess an initial business case for the project to create a high capacity cross-river tram service across the River Thames. JRC has now reported its findings.

Key findings include:

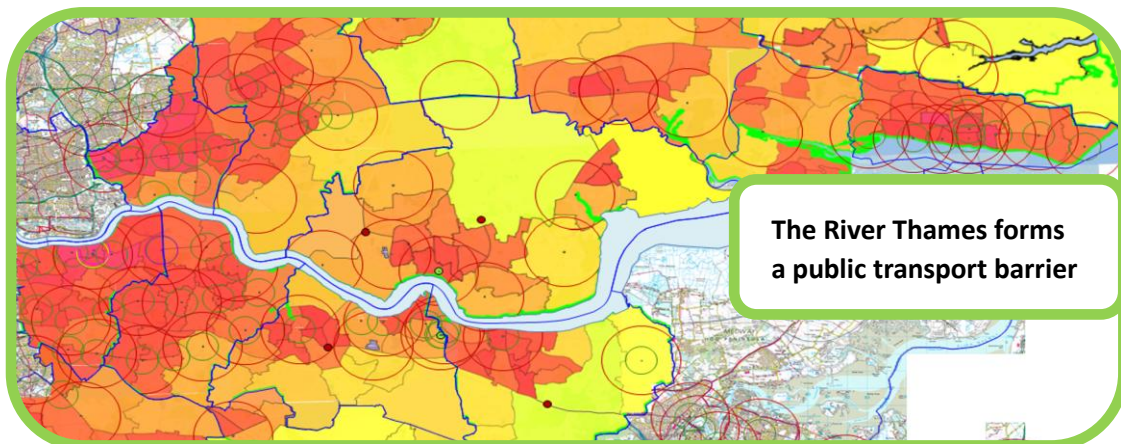
1. The proposal

To link North Kent, South Essex and outer London catchments, via a cross-river tram route through a bored tunnel from Grays (Thurrock). This will interchange with existing railway lines along both riverbanks and with local buses. A surface route can continue on the south bank to Ebbsfleet, Gravesend, and Dartford via Bluewater.

There is potential for later extensions in both Essex and Kent to support further housing and economic growth.

2. The immediate problem

KenEx connects a dense 1.5-1.8 million population, who have no effective, frequent, high capacity cross-river public transport for the 20 miles downstream from Woolwich in inner London. The express HS1 line to St. Pancras serves Ebbsfleet, but doesn't then stop until Stratford, so doesn't assist local travel. The last public ferry (Gravesend-Tilbury) closed in 2024, leaving an hourly cross-river bus (Bluewater-Greenhithe-Lakeside).



The KenEx project provides new capacity for river bank and cross-river travel hindered by congested road junctions and traffic jams on the Dartford Crossings. It helps to unify the Thames Gateway communities, increases cross-river mobility for access to jobs and supports road capacity release for greater economic expansion and population growth. KenEx offers a practical, high-capacity means to underpin Thames Gateway's future.

3. Economic growth but an infrastructure gap

- The Thames Gateway is a high growth economic zone constrained by a fundamental infrastructure gap: no high capacity cross-river public transport east of Woolwich.
- There is substantial population, economic activity, and travel demand across North Kent, South Essex, and outer East and South East London. However connectivity remains overwhelmingly car-reliant, centred on the congested Dartford Crossing.
- The area economy is developing, modernising and growing, with a 2023 Gross Value Added worth of **£33 billion just within rail station catchment zones**, and an annual **£50 billion** throughout the Gateway (more than some nation states).

4. Scale of the shortfall

- The Dartford Crossing carries roundly 49 million passenger journeys annually, with 94% made by car, reflecting a near-total lack of viable public transport alternatives.
- There are no meaningful cross-river bus or local rail services in this corridor; existing options are slow, indirect, or uncompetitive.
- Congestion is chronic, suppressing economic activity, distorting travel patterns, and weakening labour market integration across the estuary.
- It is fundamentally unacceptable for a foreseen population approaching 2 million people by 2050, with this scale of GVA, to be offered no high capacity, high quality public transport in current local government reshaping.
- People face a major shortfall in transport accessibility and equality around the Thames Gateway and the wider Thames Estuary.

5. Structural mismatch

- Population across the core catchment is already 1.5–1.8 million and projected to grow significantly to 2050 and onwards, to 2 million and more.
- Economic geography is increasingly **polycentric** (multiple employment and trading hubs), but, beyond the London Overground, railway infrastructure remains **radial and not-interconnected**, and focused primarily on London commuting.
- This disconnect limits Gross Value Added (GVA), labour mobility, and access to jobs, skills, and services.

6. Limits of road-based solutions

- The proposed Lower Thames Crossing (~£10bn+) is primarily justified by national and long-distance traffic.
- Evidence suggests congestion relief will be temporary and poorly targeted at local demand, which is concentrated west of the proposed crossing.
- Critically, new road capacity does not address suppressed demand from non-car users or enable modal shift at scale.

7. Case for high capacity public transport

- Evidence from East London shows that when cross-river rail is provided (e.g. DLR, Elizabeth Line), demand scales rapidly to 25–50 journeys per head annually.
- Comparable demand is latent in the Gateway but currently suppressed due to lack of infrastructure.
- Improved accessibility directly supports higher GVA through better labour market reach, productivity, and investment attractiveness.

8. KenEx proposal - Cross-river tram system

- In the absence of commitments through local government reorganisation, KenEx is a privately promoted tram system which is a viable, scalable solution.
- KenEx frees Thames Gateway constraints. It transfers bottlenecked GVA and growth, from the Dartford Crossing to cross-river tram, aided by main line rail and buses.
- This is worth **£3 Billion during 2034-2050** with a minimum KenEx scheme between Grays and Ebbsfleet.
- It can be worth nearly £9 Billion in the same period, if the project were taken further to Gravesend and Blowerwater.
- Tolls on the Dartford Crossing mean that a public transport option is also fundable – and road tolling could be tithed for KenEx, to help congestion relief and GVA growth.

9. KenEx strategic benefits

- Unlocks suppressed cross-river demand and gains modal shift from congested roads.
- Integrates currently disconnected labour markets across both riverbanks.
- Supports planned housing growth and new development corridors.
- Increases rides per head and associated GVA, strengthening the regional economy.
- Provides a long-term, scalable basis for a polycentric transport network.

10. Investment context and OBC status

- The scheme complements, but does not duplicate, the proposed Lower Thames Crossing by addressing local cross-river travel demand which remains unserved by current or planned infrastructure.
- The initial appraisal shows the scheme has the potential to achieve a **Benefit-Cost Ratio (BCR) in the range of 2.0-3.0+, achieving DfT's 'High Value for Money' category.**
- This position results from a combination of significant release of suppressed demand, strong decongestion impacts and material Wider Economic Impacts (WEIs). All these are key drivers of economic value.
- Initial sensitivity judgments are that the Value for Money case is robust to downside scenarios. Lack of public transport alternatives limits mode shift risk; core benefits are resilient due to existing suppressed demand; a BCR higher than 1.5 is achievable even with higher capital costs. Road tolling allows KenEx more pricing flexibility.

Conclusions from headline findings

Without intervention, the Thames Estuary will remain constrained by poor connectivity, limiting its economic potential despite strong population and growth fundamentals. Road expansion alone is insufficient. A high-capacity, rail-based cross-river system—such as KenEx—offers a structurally different outcome: enabling sustainable growth, improving productivity, and rebalancing the regional economy over the next 25+ years.

Estimated travel volumes point towards 72 million journeys via cross-river public transport in the same period with a minimum scheme. A Grays-Gravesend/Bluewater scheme could attract over 170m journeys, reaching an annual rate of 10 million and more around 2040. These are cautious estimates, and don't allow for integration of public transport and other positive actions towards a TfL 'gold standard' which could double or triple public transport passenger volumes.