Bluespace Thinking Ltd -17th July 2012
Assessment of Government rail improvement plans announced 16th July 2012

On the 16th July 2012 the Government announced plans for £4.2 billion of rail infrastructure improvements for the period 2014 – 2019. This is in addition to £5.2 billion already announced for the same period to complete the £22 billion London Cross Rail and Thames link projects and other smaller improvements.

The announcement followed the release of data on the 13th July by the Office of the Rail Regulator (ORR) that shows the current extent of over crowding on many of the UK's key rail routes. (Table below)

According to the ORR over the last two years demand for regional rail services has increased by 15.4%, London services by 11.4% and long distance services by 9.6%.

The improvements announced are designed to increase peak time services for Birmingham by 10%, Leeds 20%, Manchester 22% and other regional cities (Bristol, Leicester, Liverpool Newcastle, Nottingham and Sheffield) by 14%. When added to the Cross rail and Thames link projects London terminal capacity is expected to increase by 22%. These improvements are all that are to be provided between 2014 and 2019. Given the rate of demand growth over the last two years and the current overcrowding levels it appears that overcrowding will get significantly worse over the next 7 years.

Beyond 2019 Government have already announced that the priority for investment will be the £34 billion long distance High Speed Rail HS2 project. This £3billion/year for the 12 year period to 2031, at current levels of Government support, will leave no money for further Regional and London capacity improvements. The DfT have indicated that they are seeking to reduce the level of subsidy to the UK rail industry that is generally considered to be inefficient.

The table below is based on the ORR data released on the 13th July and sets the planned improvements in context. The destination City and operating companies' services are ranked in order of priority for investment based on the % of standing passengers in 2011. While it is very unlikely that the rate of growth over the last two years will continue if it does an additional 50-60 % of demand and overcrowding would be added to regional services, 45 – 55% to London services and 30 – 40 % to intercity long distance services.

Services that would by improved by the HS2 project are highlighted in orange/brown, although well down the priority list, based on % of standing passengers, the Virgin London to West Midlands services are Governments priority for improvement. Electrification and other improvements to the Midlands Main Line and East Coast Main Line announced as part of the £5,2 billion plans will increase capacity and reduce journey time for the East Coast & East Midlands Trains services from London to Leeds, Sheffield, Nottingham and Newcastle which will adversely impact the economic case for HS2. If built HS2 will increase the capacity on the relevant services by over 200% providing more than three times as much capacity as is currently needed.

UK Rail Network - Key areas of over crowding in 2011
(Table prepared by Bluespace Thinking Ltd)

Data Source- Office of the rail Regulator 13th July 2012			2011 Over crowding		
Priority for investment based on % of standing passengers		Operating Company	Trains services during AM & PM peaks	% Passengers in excess of seating & safe standing capacity	% Standing passengers
1	London	London Overground	18	0%	44.6%
2	London	South West Trains	297	3%	25.5%
3	Manchester	First TransPennine Express	75	2%	23.4%
4	London	Southern	319	4%	20.3%
5	Leeds	First TransPennine Express	47	4%	19.9%
6	London	London Midland	49	7%	17.7%
7	London	First Great Western	126	11%	17.2%
8	London	c2c	92	2%	16.1%
9	Birmingham	London Midland	227	3%	13.8%
10	London	Southeastern	404	1%	13.4%
11	Manchester	East Midlands Trains	12	1%	13.2%
12	London	National Express East Anglia	304	4%	12.9%
13	Newcastle	First TransPennine Express	5	0%	12.7%
14	London	First Capital Connect	243	2%	12.5%
15	Leeds	Northern Rail	152	1%	12.3%
16	Manchester	Northern Rail	231	2%	11.2%
17	London	East Midlands Trains	28	10%	10.8%
18	Liverpool	Northern Rail	49	1%	9.6%
19	Sheffield	Northern Rail	62	1%	9.3%
20	Liverpool	First TransPennine Express	6	0%	8.8%
21	Birmingham	Chiltern Railways	16	0%	7.1%
22	London	Chiltern Railways	89	3%	6.7%
23	Sheffield	First TransPennine Express	11	1%	6.5%
24	Bristol	First Great Western	84	1%	6.4%
25	Manchester	Arriva Trains Wales	14	4%	6.3%
26	Newcastle	Northern Rail	29	0%	6.2%
27	Cardiff	Arriva Trains Wales	192	1%	6.2%
28	Birmingham	CrossCountry	78	1%	5.3%
29	Manchester	CrossCountry	12	0%	4.6%
30	Sheffield	East Midlands Trains	23	0%	3.9%
31	Sheffield	CrossCountry	24	4%	3.8%
32	Liverpool	Merseyrail	185	0%	3.7%
33	Birmingham	Arriva Trains Wales	12	0%	3.0%
34	Leeds	CrossCountry	12	1%	2.4%
35	Nottingham	East Midlands Trains	57	0%	2.2%
36	Newcastle	CrossCountry	16	0%	2.1%
37	Leicester	East Midlands Trains	55	1%	1.9%
38	Bristol	CrossCountry	19	1%	1.4%
39	London	Virgin Trains	60	1%	0.7%
40	Birmingham	Virgin Trains	30	0%	0.4%
41	Leicester	CrossCountry	20	0%	0.2%
42	Leeds	East Coast	12	0%	0.1%
43	London	East Coast	30	0%	0.1%
44	Bristol	South West Trains	1	0%	0.0%
45	Cardiff	CrossCountry	6	0%	0.0%
46	Cardiff	First Great Western	30	0%	0.0%
47	Liverpool	East Midlands Trains	5	0%	0.0%
48	Liverpool	London Midland	12	0%	0.0%
49	Liverpool	Virgin Trains	5	0%	0.0%
50	Manchester	Virgin Trains	14	0%	0.0%
51	Newcastle	East Coast	20	0%	0.0%
52	Nottingham	CrossCountry	11	0%	0.0%
53	Nottingham	Northern Rail	6	0%	0.0%