

Western Gateway STB Board Meeting – 6 April 2022

Network Rail update

General updates:

Covid, demand, and franchising

The latest figures from the Department for Transport show that railway passenger figures made a strong recovery in March 2022. The peak day was 18 March, when passenger figures reached 80 % of pre-lockdown levels, averaging around the 75 % figure. The figures compared very favourably with the lowest levels seen in April and May 2020, when they dipped below 5 % in response to the first Covid lockdown and its restrictions on travelling. Freight demand has mostly recovered to pre-pandemic levels across the network and in some cases exceeded.

As reported previously, there has been considerable variation in recovery across journey types as well as across geographic regions. The leisure sector has recovered very strongly to over 90 % of pre-covid demand, whilst the commuting and business sectors remain slower to recover. Generally, weekend demand has recovered significantly more strongly than weekday demand.

Typically, regional cities (Bristol, Exeter, Southampton etc.) have recovered faster than London and the south east, and many smaller hubs have recovered faster than larger towns and cities. This is especially the case in parts of the country well visited by tourists, such as the south west.

Regardless of the trajectory of the recovery the impact of Covid will continue to have major implications on industry finances and funding, but the shape of recovery and the objective to build back better may create new opportunities. Guidance on economic and behavioural assumptions to use for rail business cases continues to be updated, and Network Rail continues to coordinate the Rail Covid Forecasting Group which includes operators and Sub-national Transport Bodies with the task of sharing and collaborating on information and assumptions.

Covid has accelerated the transition from rail franchises to National Rail Contracts, with most operators moving to their contracts imminently and away from their Emergency Measures Agreements. The new forms of agreement see financial risk remaining with the DfT and align with the greater role in service development and specification for local and regional authorities as set out in the Plan for Rail.

Network Rail CP7 (2024-29) Business Planning

Network Rail continues to develop its operations, maintenance and renewal plans for the upcoming Control Period (CP) 7. As part of the development, Network Rail is keen to continue to engage with key stakeholders on its priorities. As presentation will be provide at the meeting to provide the latest information, key development areas and next steps.

Restoring your Railway Ideas Fund

Successful submissions to the DfT's Restoring your Railway Ideas Fund (up to £50k to third party promoters to produce an SOBC) Rounds 1 and 2 in Western Gateway geography included:

- Wareham – mainline services to Swanage
- Devizes Gateway – new station
- St Anne's Park, Bristol – new station
- Kemble to Cirencester – railway reinstatement (as light rail)

Network Rail has supported the promoters to develop SOBCs for each scheme, with all submissions made by December 2021. Formal announcement of the outcomes, and any next steps, for each of the above proposals is awaited from DfT.

Successful submissions to the Ideas Fund Round 3 in Western Gateway geography included:

- Corsham new station
- Stonehouse Bristol Road new station

Early engagement with the promoters of the above projects is ongoing. There is a specific challenge in the case of Stonehouse, where the scheme is also required to consider an option for a different location, known as South of Gloucester. Network Rail is arranging discussions with DfT and GWR to consider how this can best be considered as part of the project.

Great British Railways and the Whole Industry Strategic Plan

A Great British Railways transition team has been mobilised to implement the Williams-Shapps Plan for Rail recommendations. Like the eventual GBR this transition team is separate from Network Rail. The long-term planning transition team under Elaine Seagriff is meeting with Sub-national Transport Bodies and a meeting has already been held with Western Gateway officers.

GBR is tasked with assembling a 30-year strategy for rail and it is likely that this will be based on the Whole Industry Strategic Plan (WISP), work for which is underway. The WISP is expected to be presented to the Secretary of State for Transport in late 2022. The recent Call for Evidence consultation responses will form a significant contribution to the final version of the Plan.

Strategic study updates

The programme of strategic studies was agreed with Western Gateway and other relevant Sub-national Transport Bodies in Autumn 2019. Studies in the Western Gateway area have been identified and remits agreed specifically to support implementation of the Western Gateway Rail Strategy. Study outputs also represent inputs into the Strategic Partnership Groups.

Completed strategic studies

West of England Line Study

Published in 2020, the study recommends service improvements between Salisbury and Exeter as well as performance improvements and diversionary capability. A number of loops and extensions to reduce the length of single line are required. The next phase of development work required to progress the priority interventions identified has been scoped and funding sought.

Dorset Connectivity Study

The study considers how connectivity to and across Dorset can be improved, with key focuses BCP, Weymouth, and the Heart of Wessex Line (Westbury to Weymouth). A range of new service scenarios were assessed including the Western Gateway Dorset Metro aspiration of four trains per hour across BCP, as well as the proposed Swanage Bournemouth service.

The study identifies a range of infrastructure requirements including an additional platform at Bournemouth station; signalling improvements and track upgrades between Bournemouth and Wareham; level crossing and power supply upgrades; and track redoubling and additional platform capacity at Weymouth.

On the Heart of Wessex Line the study finds that standard timings for an hourly stopping service are achievable but would require a loop between Yeovil Pen Mill and Castle Cary, as well as an intervention around Frome/Westbury.

In addition to the service recommendations and infrastructure interventions key recommendations include detailed consideration of First and Last Mile integration at key stations including Weymouth; Dorchester stations; Wareham; Poole; Bournemouth; and Brockenhurst.

The opportunities for upgrades to Bournemouth station are picked up in South West Main Line Phase 2 study, whilst conversations on Poole station opportunities have started with BCP.

Bristol to Exeter Corridor and Bristol to Birmingham Corridor Strategic Studies

The Bristol to Birmingham and Bristol to Exeter Strategic Studies have been completed, following the release of the final reports. A presentation on the outputs and recommendations has been given to a previous Western Gateway Board meeting.

Both studies make recommendations for the development of passenger and freight rail services required to support planned growth in answer to a similar headline question: *How can rail best support sustainable economic and housing growth between Bristol and Birmingham/Exeter?*

The studies were developed in close collaboration with Western Gateway with the intended role of progressing recommendations of the Western Gateway Rail Strategy. Subsequently development work has been commissioned to explore the feasibility and cost of the key interventions identified as required in each study. These include:

- Cheltenham Spa bay platform; Gloucester station area upgrade; Gloucester to Westerleigh Junction track capacity; Bedminster to Parson Street four tracking; Worle Station upgrade; and Worle Junction to Weston-super-Mare redoubling and new bay platform.

As discussed at earlier Board meetings this further development includes a funding contribution commitment from Western Gateway demonstrating the extent of collaboration and the benefits of the approach.

The studies will be published in summary version alongside the full reports shortly. The ongoing development work will inform the next steps for implementation of the recommendations. There is a clear opportunity to shape the next steps including potential implementation of recommendations in line with STB priorities.

Solent to the Midlands Multimodal Freight Strategy Phase 1

Joint study with National Highways on the strategic priorities to accommodate growth in existing and new freight markets. Diversionary rail routes including via Salisbury are identified as a key development priority. The study is now published on the NR and NH websites and a second phase is underway.

Ongoing strategic studies

South West Main Line Strategic Study Phase 2

This new study considers South West Main Line markets from Woking outwards and includes Bournemouth and Salisbury in its scope. It will involve detailed consideration of 8 regional hubs including Salisbury and Bournemouth.

The study seeks to answer the strategic questions: *What is the future of rail demand on the South West Main Line on existing flows?* What are the potential new rail flows in the scope area? How does rail need to change to accommodate future demand on the South West Main Line outer network? What would be the impact of the potential new train services on the rail system?

The study is currently in the baselining and evidence building stage with demand analysis ongoing. Detailed timetabling work will follow and the study will output recommendations on passenger freight service development alongside station recommendations. The draft report is expected in summer 2022.

Greater Bristol Strategic Study (GBSS)

The study seeks to answer the key question: *How can rail best support sustainable economic and housing growth in Greater Bristol?* It considers sub-questions on how passenger services can be improved, the

response to potential post-covid demand shifts, rail's contribution to environmental objectives, the resilience and reliability of the system, and accommodating freight growth.

Part of the role of the study is to look beyond planned service improvements in the area such as MetroWest to the next phase of improvements, including integrating recommendations arising from the Bristol Corridor studies, as well as from Welsh Government etc.

Outputs to date have included provision of a baseline report on the current conditions; completion of stage one of the capacity assessment, which modelled the service baseline and the impacts of a nominal 1tph uplift on key corridors; and the undertaking of detailed analysis of potential markets to form an evidence base.

A freight strategy has been developed as part of the GBSS, which has identified a number of key components including the opportunity to develop a Regional Freight Interchange (RFI) serving growing market demand in north Avonmouth. This element is being progressed in parallel with the study.

Timetabling and identification of interventions supporting both passenger and freight demands will follow and the study is expected to report in early Summer 2022. The study follows the collaborative approach established and stakeholder input – especially from Western Gateway – is critical to its success. In this regard, experience has been very positive, with nine stakeholder events (study group meetings and workshops) already undertaken.

Solent to Reading Freight Study

This study picks up from the joint Network Rail / National Highways multimodal study and considers the core freight route from Southampton to Reading, via Basingstoke. The alternative route between Southampton and Basingstoke via Laverstock Junction (Salisbury) is also in scope, and one of the headline strategic questions is *What are the options for a diversionary route to ensure continued resilience and flexibility on this route?*

The study remit and scope have been agreed and detailed workshops have been held with freight industry partners on diversionary routes and operational challenges.

Decarbonisation

In February 2022, DfT endorsed the Wales & Western Regional Traction Decarbonisation Strategy. This presents a prioritised strategy for removing all diesel trains from the W&W rail network, coordinated with the national Traction Decarbonisation Network Strategy work and the Whole Industry Strategic Plan. While the strategy sets out a vision for decarbonising the rail network and has been developed in partnership with GWR as the major passenger operator in the Western Route area, it does not at this stage come with any funding from central government sources.

The strategies consider the benefits of decarbonisation alongside factors such as the age of rolling stock and availability of power supply to identify a prioritised list of schemes to achieve full decarbonisation. Assessment is split into the categories of decarbonisation benefits and deployment efficiencies, with the following criteria:

- Diesel vehicle miles removed; dependencies on other routes; freight potential; passengers impacted; power-supply availability; rolling stock lifespan; signalling interfaces

The first, highest priority tranche (known as tranche 0) includes the schemes that were part of the Great Western Electrification Programme (GWEP), including Chippenham to Bristol Temple Meads and Bristol Parkway to Bristol Temple Meads. These route sections remain the number one priority for Western Route decarbonisation.

The next priority tranche (tranches 1-2) cover the key mainline routes throughout Western, and link with the priority routes in the Central and West Coast South and Southern regions' decarbonisation strategies. As such, these together with tranche 0 cover all routes with Western Route that are relevant for the Western Gateway geography.

The next steps will involve more detailed understanding of traction technology, industry rolling stock strategy, and financial constraints whilst also exploring non-DfT development funding options with key stakeholders and funders.

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For and on behalf of the Network Rail Wessex and Western strategic planning teams