

Network Rail is the owner and operator of Britain's rail infrastructure. We own, maintain and develop the track, signals, bridges, tunnels and stations that make up Britain's railway.

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A photograph of a busy city street, likely in London, showing a large number of people walking. In the foreground, a woman with white hair is seen from behind, wearing a light-colored coat and carrying a small black backpack. To her right, a man in a dark suit is walking away, carrying a black briefcase. Further down the street, many other people in business attire are visible, some carrying bags or briefcases. The background features several large, multi-story buildings, including one with a prominent dome. The scene is brightly lit, suggesting a sunny day.

*Britain relies
on rail*

Britain relies on rail

Even if you're not one of the three million people who travel by train every day you still rely on rail.

Rail gets millions of people to work every morning and home again every evening.

Rail carries goods between ports, factories and shops and fuel to our power stations, helping businesses avoid the cost and disruption associated with road congestion.

More people and businesses want to use rail than ever before.

If we don't start planning ahead now and creating more rail capacity, people will be crowded off trains, freight will be forced onto our already congested roads and businesses across Britain will suffer.

Rail is vital to helping Britain build a thriving, sustainable, low-carbon economy.

Investment in rail is not a luxury, it's a necessity.



Growing Britain's economy

Investing in rail is one of the most effective ways to help grow Britain's economy.



The rail network is busier than ever

- > More and more people are choosing to travel by rail
- > There are 40% more passenger journeys and there is 60% more freight than just 10 years ago
- > The increasing popularity of rail means that 50% more trains run today than under British Rail and one million more trains run every year than just five years ago.

The railway is nearly full

- > At peak times on the busiest parts of the network there is no space for more trains but demand for rail is still increasing
- > Over the next 30 years freight demand is expected to go up by 140% and passenger demand will more than double.

Improving the rail network provides faster, more frequent and more reliable journeys between Britain's cities

- > Better rail links create better connections between people and jobs and bigger customer bases for companies selling products and services
- > Rail brings businesses closer together, making Britain more competitive and a better place to do business.

Investment in rail is essential for Britain's economy

- > Businesses need the rail network to expand to accommodate their growing needs
- > Rail investment helps to stimulate private sector growth.

CASE STUDY

London Liverpool Street station: The gateway to the City

London's Liverpool Street station is the gateway to the City, Britain's financial centre.

Every year nearly twice as many people – 123 million – use Liverpool Street station as use Heathrow Airport. In the morning rush hour alone, around 75,000 people arrive at the station.

Getting this many people to work means that, in the busiest hour of the morning, a train arrives or leaves Liverpool Street almost every 30 seconds and there is no space for more trains.

Increasing demand from businesses in the City means that, every morning, rail will need to be able to transport at least 14% more people into the station by 2014.

Continued investment in growing the network is essential so that rail can support the City and the economy by getting more people to work than ever before.

Getting people to work

Of the 1.3 billion journeys made by rail every year, 1 billion are people commuting or travelling for business.

In the busiest 3 hours every weekday morning rail transports...

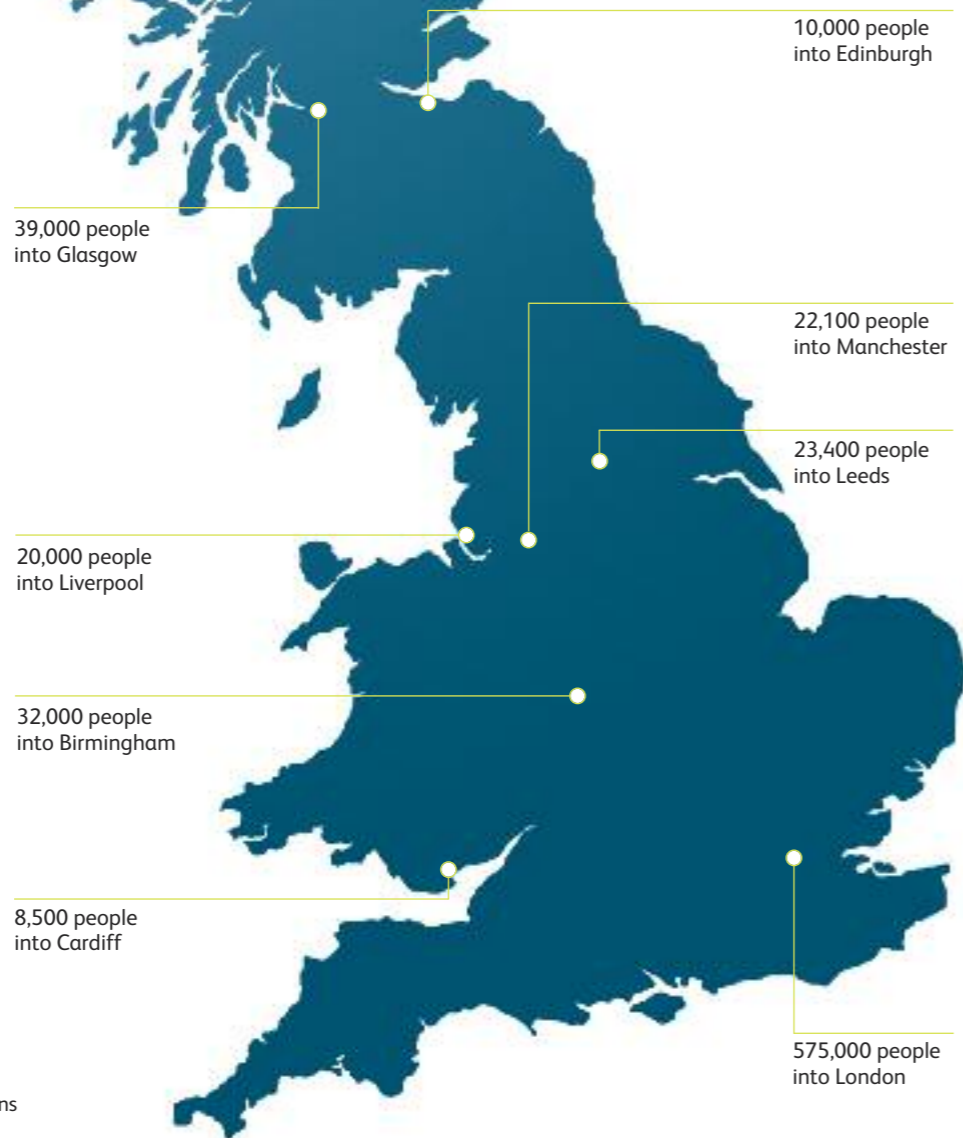


Living and working in different places is becoming the norm

- > Trains are getting busier as more people choose to travel to work by rail
- > Rail transports hundreds of thousands of people to work in Britain's cities every day.

Britain's cities are economic centres

- > Around 60% of jobs in Britain are located in cities and 75% of the private sector workforce live in and around cities.



Source: Network Rail Route Plans
National Rail

Connecting cities

> Every year there are 266 million business journeys between Britain's cities.

| From | To | Typical road journey time ¹ | Typical rail journey time ² | Time saved by train |
|-----------|------------|--|--|---------------------|
| London | Birmingham | 2h 31m | 1h 22m | 1h 9m |
| London | Manchester | 3h 57m | 2h 07m | 1h 50m |
| London | Sheffield | 3h 12m | 2h 08m | 1h 4m |
| London | Leeds | 3h 41m | 2h 25m | 1h 16m |
| London | Cardiff | 2h 56m | 2h 01m | 55m |
| London | Edinburgh | 7h 25m | 4h 28m | 2h 57m |
| Glasgow | Edinburgh | 59m | 50m | 9m |
| York | Leeds | 41m | 25m | 16m |
| Newcastle | York | 1h 43m | 58m | 45m |
| Reading | Bristol | 1h 27m | 59m | 28m |

¹Source: AA Route Planner
²Source: National Rail Enquiries

Encouraging business investment

Good rail links make Britain's towns and cities better locations for businesses to invest with confidence.



Helping small businesses grow

Entrepreneurship is crucial to economic recovery and long-term future growth of the British economy. The small businesses of today are the world beaters of tomorrow, and they drive innovation and competition.

Quality transport links allow small businesses to grow their customer bases in cities and towns across the country.

Attracting big business

For medium and larger businesses, transport is just as crucial. Attracting the best people is vital to remaining competitive and employees have to be able to get to work quickly and easily.

Flexible work forces are also more important than ever. Businesses need to be able to react quickly to changes in demand and good transport links are an important weapon for fighting unemployment.

Better business travel

Face-to-face meetings with clients, business partners and consultants also remain key to the way people do business – long, complicated or delayed journeys are costly and bad for business.

Rail competes with road for providing businesses with the quickest and most efficient journeys between city centres.

Not only are rail journeys often faster than by road but rail allows business travellers to maximise constructive 'work' travel time. More frequent services and shorter journey times play an important part in improving business efficiency.

CASE STUDY

London: The best European city for business

Every year, Cushman Wakefield's European Cities Monitor surveys the perceptions of major companies and ranks Europe's cities as desirable locations in which to do business.

Transport is one of the most important factors for deciding where businesses locate.

London is the top rated city for transport in Europe, both in terms of

getting around the city itself but also because of its links to other cities in the UK and internationally.

Every year 70% of all rail journeys start or end in the capital.

The quality of London's transport links, including rail, has been a key contributing factor in London's continued position at the top of the overall rankings of all European cities in

each of the last 20 years, since the monitor began. Continued investment in London's transport is essential.

Moving goods around the country

Rail freight plays a vital role in Britain's economy.

Rail freight directly contributes £870 million to the economy and supports an output of £5.9 billion, six times its direct turnover.



“Using alternatives to road transport such as transporting more goods by rail, we now save more than 12,000 tonnes of CO₂ each year.” **TESCO**

“There has been a real change in attitude from companies we deal with in recent months. Suddenly they all want to know if they can have their goods carried in an environmentally sensitive way and, in particular, if they can have them moved by train.”
WILLIAM STOBART / CHIEF EXECUTIVE / EDDIE STOBART

In 2008 alone rail freight transported over 100 million tonnes of goods worth around £30 billion.

A transformation

Over the last decade, rail freight has adapted to meet the changing needs of business.

While many people still associate rail freight with its traditional role transporting bulky goods, such as coal and steel, it now transports more and more consumer goods like wine, groceries and white goods.

Over the past six years alone, the amount of consumer goods carried by rail has grown by 46%, the greatest growth of any freight market.

Cost effective

With fossil fuels becoming scarcer and fuel prices reaching new highs, rail offers an increasingly cost-effective and competitively priced alternative to road transport.

Less fuel is needed to transport a tonne of goods by rail than by road, saving businesses money.

On average a gallon of fuel will move a tonne of goods 246 miles on the railway, but only 88 miles by road.

Reliable

The ability to rely on goods and materials being delivered on time is critical to business.

Over a quarter of all road freight journeys are delayed as a result of congestion on Britain's roads.

In comparison, more than eight out of every ten freight trains complete their journey on time and, for premium delivery goods trains such as those used by supermarkets, punctuality is at 98%.

Sustainable

Businesses know that minimising their carbon footprint is important to their long-term competitive edge as Britain moves towards a low-carbon economy.

Road freight contributes twice as much carbon as the entire rail transport sector – freight and passenger – together.

A tonne of freight moved by rail produces less than a quarter of the carbon than the same amount transported by road. While each freight train can typically take around 60 lorry journeys off our roads.

In the extreme case that all freight currently carried by rail was transferred to road, there would be an additional 1.9 million tonnes of carbon dioxide produced each year.

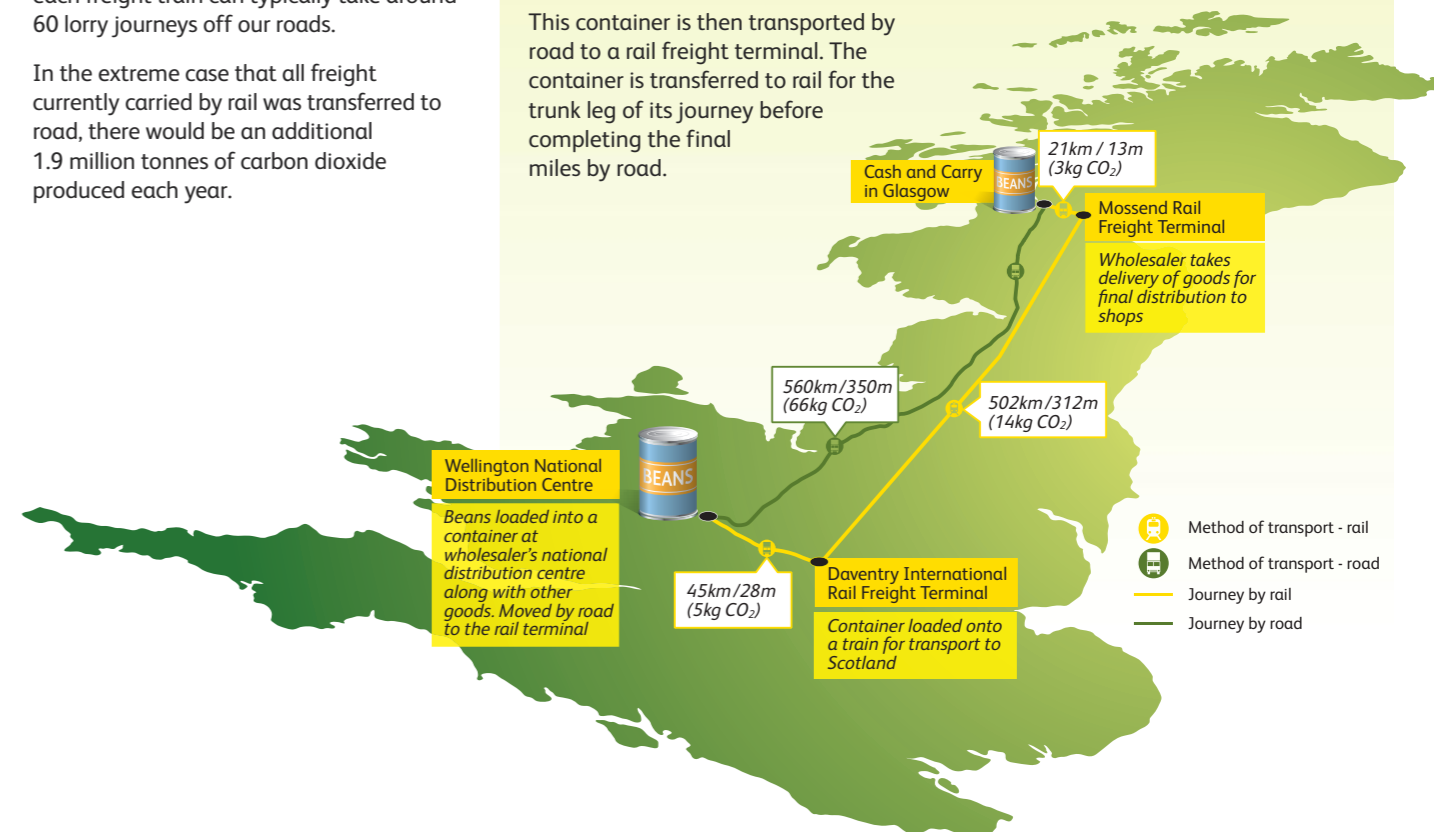
The journey of a tin of beans

The figure shows the journey of a typical consumer item transported by rail.

A tin of beans starts off its journey being loaded onto a container at the national distribution centre of a major supermarket chain. A number of other goods such as cleaning products, toiletries and other food stuffs will also travel with the beans.

This container is then transported by road to a rail freight terminal. The container is transferred to rail for the trunk leg of its journey before completing the final miles by road.

It also shows the CO₂ emissions at each stage of the journey comparing rail or a road alternative. Even after the carbon cost of the road legs at either end has been included, the rail option produces a third of the CO₂ of the road route.



CASE STUDY Supporting the car export market

Rail freight contributes to the British export market delivering cars such as Minis, Land Rovers and Jaguars to ports so that they can be shipped abroad. The use of rail helps enable the safe delivery of these prestige goods.

Jaguar operates railheads at both its Halewood and Castle Bromwich plants

enabling more than 70% of its production to travel by rail.

Jaguar estimates that these railheads save 4.5 million lorry miles a year. Jaguar also credits rail with improving distribution efficiency as it allows Jaguar to avoid the disruption associated with road congestion.

22 cars can be transported in each rail wagon meaning that 176 cars can be carried on a typical eight wagon train. This same load would require 22 lorry transporters.

The unaffordable cost of road congestion

The Eddington Study estimated that time lost to road congestion costs the economy £7.8 billion every year, a figure that is set to rise to £22 billion by 2025.



Time lost by drivers every year to congestion

Investment in rail can help drivers by minimising congestion and delay on Britain's roads.

- > 96% of businesses and 87% of the public believe congestion is a serious problem for the country³
- > A CBI survey in 2008 revealed that nearly 90% of respondents said poor reliability of the road network is having a negative impact on their productivity⁴.

CASE STUDY

Cutting road congestion: Rail freight and the Olympics

Estimates indicate that rail deliveries to the Olympic Park in East London will help to avoid between 250,000 and 380,000 hours of local congestion in a single year.

Millions of tonnes of materials must be delivered to the site. By January 2010, 65.7% of construction materials (by weight) had been brought in by rail, minimising the impact of lorries on the local community.

Two railheads have been built near the Olympic site. These have seen 3-4 trains going into the London Olympic site and adjacent Stratford City development most days carrying approximately 1,350 tonnes of material per train.

The railheads have the potential to cater for up to eight trains a day and the Olympic Delivery Authority estimates that each train replaces approximately 75 lorries, so in total rail has the potential to remove 450 to 600 lorries a day in each direction.

The state of our roads

Road traffic levels have risen by more than 12% over the past decade and England's main roads are congested and unreliable.

Every year, drivers waste the equivalent of over 14,500 years sitting in traffic jams on England's main roads⁵.



³Source: CBI Transport Survey, 2009
⁴Source: CBI London Survey, 2008

⁵Source: Department for Transport: Total vehicle delay strategic road network routes

Rail pays back

All of our proposed major projects for improving the railway will pay Britain back by generating significant benefits.

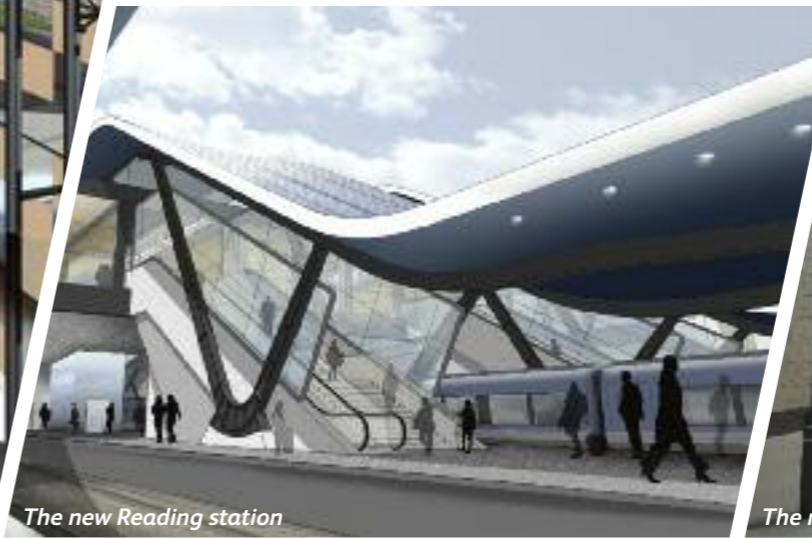
Inside the new Blackfriars station



The new Blackfriars station at night



The new Reading station



The new Farringdon station



Thameslink

The Thameslink route is one of the busiest and fastest growing parts of the rail network, running straight through the centre of London and connecting major transport hubs, including Luton and Gatwick airports, St Pancras International and London Bridge station.

The Thameslink Programme increases the capacity of the route, providing the infrastructure to enable up to 24 trains per hour, each 50% longer. New stations will also be opened at Blackfriars and Farringdon to accommodate greater numbers of passengers.

“The Thameslink Programme is vital not just for the City but for the whole of London.

This much needed increase in capacity will help ease the strain on our public transport network and is a prime example of the kind of infrastructure investment that is so vital if the City is to retain its position as a leading centre for international finance in the years to come.”

LONDON CHAMBER OF COMMERCE

Reading

With passenger demand at the station set to double by 2030, we need to enable more trains to run through Reading. We need to give passengers a better experience at the station and reduce the number of delays caused by trains having to wait for platforms to become available.

We're doing this by building more platforms, more accessible station entrances with step-free access to all platforms, and a viaduct to let long-distance trains come into the station over the current tangle of track.

“Reading is an important place in the region for commuters and shoppers alike.

Investment in the railway at Reading is vital to ensure growth and secure new opportunities for businesses large and small in the town.”

GORDON STENTON
MANAGING DIRECTOR FOR JOHN LEWIS
(READING)



Airdrie-Bathgate: looking east at Hillend Reservoir

The Port of Felixstowe

Manchester Beetham Tower

The Angel of the North

Airdrie-Bathgate

Network Rail is re-opening the Airdrie-Bathgate rail link after 50 years of closure to enable sustainable economic growth in the region.

This project, which also involves upgrading the existing lines between Bathgate and Edinburgh and between Airdrie and Drumgelloch, will provide new journey opportunities for passengers.

It is expected there will be four trains per hour in each direction between Edinburgh and Glasgow at peak times.

The new railway will bring considerable economic and environmental benefits for communities along the route, by creating a direct link to Edinburgh and the East and to Glasgow and the West and helping to keep road congestion on the M8 to a minimum.

“Investment in transport infrastructure is a key ingredient in growing the country’s economy.

Rail infrastructure investment is hugely important, so the Airdrie-Bathgate re-opening is going to bring enormous benefits to Scotland. It is a good project and will give substantial returns.”

IAIN MCMILLAN
DIRECTOR OF CBI IN SCOTLAND

Felixstowe-Nuneaton

Network Rail is upgrading the cross-country rail route from Felixstowe to Nuneaton, via Ely, Peterborough and Leicester so that freight being moved from the east coast ports to the North West does not always need to travel via London.

This work will enable the number of trains to more than double from 10 to 24 in each direction every day and enable longer trains to run, taking more goods than ever by rail across the country.

This will remove the need for up to 1,400 lorry journeys every day, helping to minimise road congestion on key regional roads, such as the A14 where up to a third of all traffic is freight and road congestion already costs the regional economy £80m a year.

“We have seen constant year-on-year growth in rail volumes through the Port of Felixstowe. We put more containers on more trains to more destinations than any other UK port.

Continued investment in the Felixstowe to Nuneaton route is key to continued future growth in rail freight.”

DAVID GLEDHILL / CEO / HUTCHISON PORTS

Northern Hub

The proposed Northern Hub project will enable 3.5 million more passengers to travel across the North every year on faster and more frequent journeys.

By building new sections of track, which will enable fast trains to overtake stopping services, new platforms at key stations and by relieving a major bottleneck at Manchester, we will enable 700 more trains to run between the major towns and cities of the North every day.

“If we are ever to close the productivity gap between the North West and the rest of the country, it is essential that progress is made to address this prominent rail bottleneck to enable Greater Manchester to realise its full economic potential.”

CLIVE MEMMOTT / CHIEF EXECUTIVE
GREATER MANCHESTER CHAMBER OF
COMMERCE

Improving the railway

Funding for investment in the rail network is divided into five-year blocks.

We are currently in Control Period 4 (2009-14) but Network Rail is planning for the future.



What's next?

SUMMER 2011

Network Rail publishes an Initial Strategic Business Plan for 2014-19 (Control Period 5)

This will set out the industry's emerging plans for operating, maintaining, renewing and developing the rail network in future, with a focus on 2014-19 but with high-level projections over a longer term.

SUMMER 2012

Governments in London and Edinburgh publish their High Level Output Specifications (HLOSs) and the Statements of Funds Available (SoFA)

These set out what the Department for Transport and Transport Scotland want to buy from the railway over the period 2014-19 and how much money they have to do so.

AUTUMN 2012

Network Rail publishes its Strategic Business Plan

WINTER 2012

A statement from the rail regulator looks at whether the government's requirements for improving the rail network can be delivered for the funding available.

SPRING 2013

Office of Rail Regulation publishes its draft determination

The determination sets out the outputs that Network Rail will need to deliver in Control Period 5 and the revenue that Network Rail will receive from access charges and other sources.

SUMMER 2013

Network Rail publishes its response to the draft determination

WINTER 2013

Office of Rail Regulation final determination on funding for 2014-19 (Control Period 5)