



AGENDA ITEM 10

Rail Study: Review and Identification of Future Opportunities

September 2019

1. Purpose of Commission

1.1. The purpose of this commission is to:

- 1.1.1. Undertake a review of current rail flows across, and through the Heartland region, in the process producing a baseline of current movements
- 1.1.2. Identify the potential role for the rail network (infrastructure and services) based on existing economic activity and planned growth (as set out in relevant Network Rail Route Studies, East West Rail outputs, Local Plans and Local Economic Strategies)
- 1.1.3. Produce advice and recommendations on how best to realise the full potential of the rail network across, and through the Heartland region, including the identification of regionally significant schemes, measures and essential infrastructure that would benefit from more detail analysis

1.2. The output from this commission will:

- 1.2.1. Form an input into the development of the overarching Transport Strategy for the Heartland region
- 1.2.2. Develop the evidence base to support the principles set out in EEH's submission to the Williams Rail Review
- 1.2.3. Provide the basis of an on-going dialogue with the rail industry, including the Office of Road and Rail

1.3. The commission will also provide:

- 1.3.1. Advice on what changes England's Economic Heartland as the Sub-national Transport Body should seek in order to maximise the potential of the rail network (infrastructure and services) to increase its contribution in support of existing economic activity and to enable the delivery of planned growth
- 1.3.2. Advice on what changes, if any, are required to the regulatory framework overseen by the Office of Road and Rail that will enable the Sub-national Transport Body to fulfil its role
- 1.3.3. Advice on whether changes are required to the rail passenger franchising map in order to enable the potential of the rail network to be realised

2. Strategic Context

- 2.1. Stretching from Swindon to Cambridgeshire and from Northamptonshire to Hertfordshire, England's Economic Heartland brings political and business leaders together in a strategic collaborative partnership with a shared commitment to realise the economic potential of the Oxford – Milton Keynes – Cambridge corridor and surrounding areas.
- 2.2. The Oxford – Milton Keynes – Cambridge corridor has been the subject of a report undertaken by the National Infrastructure Commission. The report identified the corridor as having the potential to double the size of its economy in the period to 2050
- 2.3. The report also identified the importance of ensuring that growth is sustainable for the long term, and in particular that it should deliver overall 'net environmental gain'
- 2.4. Realising the ambition identified by the Commission will not be achieved with a 'business as usual' approach
- 2.5. The Commission identified improved connectivity as being one of two key issues that needs to be addressed in order to realise the economic potential
- 2.6. The Government has broadly accepted the Commission's assessment that realising the economic potential of the corridor is critical to the long term future of the UK economy. It has identified the corridor as a key economic priority for the UK on that basis
- 2.7. Economic growth on the scale of that identified by the National Infrastructure Commission is transformational in scale. Realising economic growth will be dependent upon the planning, development and delivery of infrastructure projects in a timely manner as part of a co-ordinated investment programme

Relationship with London

- 2.8. The rail system (infrastructure and services) in the Heartland region remains dominated by the radial nature of the historic infrastructure
- 2.9. Whilst connectivity to/from London will continue to be an important market, realisation of the economic potential of the Heartland will require the development of infrastructure and services that provide improved connectivity across the Heartland and with adjoining regions
- 2.10. In particular opportunities to open up new options that avoid the need for travel into and out of London should be exploited. Delivery of East West Rail in particular provides the opportunity to establish new travel opportunities for rail travel, via interchange at strategic locations on the rail network

3. Studies and Proposals to be taken into Consideration

- 3.1. In undertaking this commission the consultants will have access to the information held in the Regional Evidence Base: this includes information on planned levels of growth in Local Plans and Local Economic Strategies and Local Industrial Strategies.
- 3.2. The commission shall take into consideration all other relevant studies, including but not limited to:
 - England's Economic Heartland's Outline Transport Strategy: Framework for Engagement
 - Freight and Logistics Study – commissioned by England's Economic Heartland
 - Cambridge Corridor Rail Study – commissioned by the Greater Cambridge and Peterborough Combined Authority

- Oxfordshire Rail Corridor Study – commissioned by Oxfordshire County Council and the Department for Transport
- Midlands to Thames Valley Corridor Studies – commissioned by Midlands Connect
- The prospectuses prepared by the East West Rail Consortium for both the East West Rail Central and Eastern Sections

3.3. The commission shall also take into consideration:

- Delivery of East West Rail (Western Section) by 2023
- Delivery of East West Rail (Central Section) by 2028
- The opportunity to reallocate capacity on the West Coast Main Line and interchange with East West Rail following the opening of HS2
- The opportunity to develop services on the corridor linking Northampton – Milton Keynes – Aylesbury – High Wycombe – Old Oak Common
- Delivery of the Western Rail Access to Heathrow
- The opportunity to deliver the Croxley Rail Link as an opportunity to create orbital as well as radial travel options
- The opportunity to develop services between Northampton and the East Midlands
The opportunity for improved connectivity provided by delivery of East West Rail Eastern Section at the earliest opportunity

3.4. The commission shall also take into consideration:

- The potential to enhance the level of connectivity on the Cambridge – East Midlands corridor
- The opportunity for enhanced connectivity to the west of the Heartland along the Great West Main Line, including proposals for new stations between Didcot Parkway and Bath Spa
- The opportunity to develop enhanced suburban rail services centred on Oxford, Milton Keynes and Cambridge
- The longer-term potential to restore services between High Wycombe and Marlow

4. Scope of Work

- 4.1. The rail network is a significant component of the overall transport system serving the Heartland region.
- 4.2. The traditional focus has been on the provision of commuter services to/from London and in longer-distance services to the rest of the UK.
- 4.3. The scale and potential for intra-regional services is an issue that this commission should consider as part of the commitment to 'connect people and places with services and opportunities' in a way that will see the transport system be zero-carbon by 2050.
- 4.4. Where investment has been made in new infrastructure and/or services this has resulted in significant growth in rail movements suggesting both that where rail services exist these can offer an attractive travel option and that the provision of rail infrastructure and services can be a strong influence in shaping future spatial strategies.
- 4.5. The Strategic Transport Forum has identified a number of concerns relating to the rail offer at present, including:



- The level and quality of facilities for passengers at stations
- The overall level of accessibility for passengers at stations
- The lack of effective integration of rail services with other local public transport and 'smart travel' choices including payment and ticketing
- The level of overcrowding on existing rail services – not just those serving the London commuter market
- The extent to which the historic pattern of rail infrastructure – with its focus on radial routes to/from London drives future investment (in both infrastructure and services)

4.6. It is expected that the commission will:

- a) Compile a comprehensive baseline of current rail flows between stations
- b) Identify the key interchanges (road-rail and rail-bus/coach) on the existing rail network
- c) Identify key rail stations (existing, proposed and potential) that support existing economic activity and/or which are required to support the delivery of planned growth (housing and employment)
- d) Compile a summary overview of base-line of current and planned service levels between key interchanges/hubs on the existing rail network
- e) Identify regionally significant strategic rail interventions (schemes, infrastructure requirements and measures) that would benefit from further analysis to realise the ambitions of the Outline Transport Strategy
- f) Identify appropriate performance measures that users consider the minimum requirement of rail service (punctuality, rolling stock quality)

4.7. The commission should also develop a categorisation of existing rail stations in the Heartland that takes into account:

- The strategic significance of the station in support of existing and planned growth
- The level of service
- The level/quality of passenger facilities
- The level/quality of accessibility for disabled people (physical, cognitive or sensory impairments)
- The quality and level of interchange with other local public transport services
- The quality and level of interchange with pedestrian and cycle route facilities

4.8. In considering interchange between rail and other local public transport services the commission shall identify mechanisms that already exist – including legislative and/or policy – that enable efficient and effective interchange from a user perspective. It shall identify any barriers that – including legislative and/or policy – that exist which need to be addressed. Where such barriers exist the commission shall advise as to what actions in order to address them

4.9. The ambition set out by the National Infrastructure Commission – to realise the economic potential of the Heartland region and to do so in ways that will realise 'net environmental gain' – means it is timely to consider the future role that rail needs to play as part of the wider overarching Transport Strategy

- 4.10. It is anticipated that the rail system, in combination with investment in improved first/last mile transport options, will need to provide for an increased proportion of future travel demand – both inter-regional and intra-regional
- 4.11. In particular the delivery of East West Rail – part of a ‘once-in-a-generation’ opportunity to create a new multi-modal spine across the region – will transform the spatial geography of the region, creating new travel options that cut across the historic pattern of rail infrastructure
- 4.12. This commission will need to consider how changes to housing market and economic geography that arise from such transformational opportunities needs to be reflected in the future planning and development of the rail network as part of the overall Transport Strategy
- 4.13. The commission will need to consider the current rail passenger franchising map for the Heartland region. It should consider whether, given the ambition for the region and the committed investments, the current franchise map is fit for purpose moving forward
- 4.14. If not, the commission should consider and advise on:
- a) Changes to the franchising map that are required in order to enable rail services to realise the full potential in support of planned growth
 - b) Transition arrangements for changes to the franchising map, taking advantage of termination dates for existing franchises
- 4.15. Where there is a need for investment in infrastructure and services the commission should consider and advise on the merits of potential models for securing the investment required – with consideration being given to be both public and private sector funding mechanisms. This should include consideration of the merits of long-term franchise arrangements and their ability to secure additional investment from the private sector
- 4.16. The commission should consider the extent to which a National Policy Statement for strategic infrastructure might assist in the long term planning, development and delivery of rail infrastructure and services
- 4.17. The commission should consider how investment in rail infrastructure and services might be delivered in ways that allow the investment to act as enabling investment
- 4.18. In all aspects of this commission, consideration should be given as to the potential for rail freight services are best taken into account when planning, developing and delivering investment in the rail network as part of the overarching transport system
- 4.19. This commission should include consideration of the requirements of existing and potential Strategic Rail Freight Interchanges and terminals located within the region, identified in the EEH Freight and Logistics Study as well as the requirements of such facilities located in adjoining regions

5. Key Partners/Stakeholder Engagement

- 5.1. Through this commission the EEH Business Unit is seeking to appoint consultants who will be capable of:
- a) Establishing and leading a representative group of interested parties drawn from EEH partners and the rail industry
 - b) Working with the representative group to undertake the requirements of this commission

- c) Engaging with activities underway in support of the 'productivity' and 'place-shaping' work streams established in support of the Oxford – Milton Keynes – Cambridge Arc

5.2. The commission should look to engage with, and involve, existing partners in the rail industry including:

- Department for Transport
- Office for Road and Rail
- Transport Focus
- Network Rail – System Operator
- Rail Delivery Group
- East West Rail Company
- Transport for London

6. Required Deliverables

6.1. The commission shall deliver:

6.1.1. A comprehensive baseline of current rail flows – presented in a format that is capable of integration into the Regional Evidence Base

6.1.2. An interim report that:

- Identifies the key interchanges on the existing rail network
- Identifies the key rail stations (existing and proposed) that support existing economic activity and/or which are required to support the delivery of planned growth
- Includes a summary overview of base-line of current and planned service levels between key interchanges/hubs on the existing rail network
- Includes proposals for the most appropriate performance measures
- Sets out proposals for the categorisation of existing rail stations

6.1.3. A final report that makes recommendations in respect of:

- Advice on what changes England's Economic Heartland should seek as the Sub-national Transport Body in order to realise the potential of the rail network (infrastructure and services) to increase its contribution in support of existing economic activity and to enable the delivery of planned growth
- Advice in respect of what changes, if any, are required in the regulatory framework overseen by the Office of Road and Rail that will enable the Sub-national Transport Body to fulfil its role.
- Advice on whether changes are required to the Heartland's rail passenger franchising map in order to enable the potential of the rail network to be realised, including changes required to improve the interchange between rail services and first/last mile transport options
- Advice on transition arrangements for changes to the franchising map, taking advantage of termination dates for existing franchises

- Investment opportunities to realise the potential of the rail network (infrastructure and services) in support of existing economic activity and in order to enable delivery of planned growth (housing and jobs)
- Identify and recommend regionally significant strategic rail interventions (schemes, infrastructure requirements and measures) that would benefit from further analysis to realise the vision set out in the Outline Transport Strategy

7. Assessment Criteria/Evaluation Methodology

7.1. Within the timescales provided (6 months) and indicative budget of (£100k). The following requirements, with their associated assessment weighting, will be used to assess proposals to undertake this work:

- Does the proposal understand the EEH requirement for the Rail Study (25%)
- Does the proposal demonstrate appropriate methodology, planning and delivery to produce a high quality Rail Study (25%)
- Does the proposal demonstrate experience of working with, and leading collaborative working groups in identification of rail issues and development of their solutions (20%)
- Does the proposal demonstrate the appropriate personnel and key skills and organisational capacity to deliver the requirements? (10%)
- Does the proposal demonstrate experience of facilitating discussion, developing a sense of common purpose and engendering ownership amongst participants of the proposed solution(s) (10%)
- Does the proposal demonstrate the extent to which the outputs listed can be met within budget and timescale (10%).

7.2. Proposals will be assessed quantitatively using the scoring principles in Figure 1:

7.3. All submissions will be scored against the scoring principles (with weighting applied). The max total score is 100. The commission will be awarded to the highest scoring application it falls short of a minimum standard threshold.

Score	Scoring Principles
0	<p>Rejected:</p> <ul style="list-style-type: none"> • No evidence reported • Evidence is unacceptable or non-existent • There is failure to properly address any issues
1-2	<p>Poor</p> <p>The evidence/response is deficient in certain areas where the lack of detail or relevant evidence requires the reviewer to make assumptions</p>
3-5	<p>Satisfactory</p> <p>The evidence/response is acceptable, but with some minor reservations</p>

6-7	Good The evidence/response clearly demonstrates that the consultant understand the environment within which the services will be delivered and provides confidence
8-10	Very Good As with 'Good' but some demonstrated innovation that is of benefit to the client

8. Terms and Conditions

- 8.1. In addition to the assessment criteria referred to in section 7 of the brief, consultants should include within their proposal:
- 8.2. A fixed price for a 6 month commission commencing October 2019
- 8.3. A clear understanding of the Rail Study brief and demonstrate innovative approaches to meeting the challenges posed by the brief
- 8.4. At a minimum, set out a clear approach to methodology and outline expected content, including details of an inception meeting (to discuss commission and initial ideas) and an inception report setting out methodology and programme
- 8.5. An outline programme of work including key project milestones
- 8.6. An overview of staff resources that are intended to be used for the commission – including names, roles, experience time allocated
- 8.7. Outline a mechanism for reporting progress back to the EEH Business Unit. Antony Swift (Project Lead) will be the client contact for EEH
- 8.8. Demonstrate knowledge/experience of EEH and rail studies of this nature
- 8.9. The submission should not be longer than 5000 words in length

9. Terms and Conditions

- 9.1. EEH propose payments are staged, taking the form of monthly invoices. The terms of funding will be discussed and agreed further at pre-award stage.
- 9.2. In order to help inform the evaluation process, the submission must include a finance schedule which lists a breakdown of costs (within the submission). This should contain the following detail: stage, activity, hourly rate, hours and total stage cost.
- 9.3. All organisations making a submission must provide evidence of meeting the insurance obligations set out in section 11 of the consultancy contract. Examples of this commitment will need to be demonstrated in the proposal or discussed during the project inception meeting. Examples of insurance obligations may include public liability insurance, employer's liability insurance and professional indemnity insurance.

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