



# **HIGH SPEED TWO: ENGINE FOR GROWTH**

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# The vision for HS2: the catalyst for high speed Britain

- A 21st century high speed rail backbone, integrated with existing network
- Direct, high capacity, rail links between our major cities
- Foundation for future growth and prosperity
- Investment in infrastructure that will deliver a lasting dividend

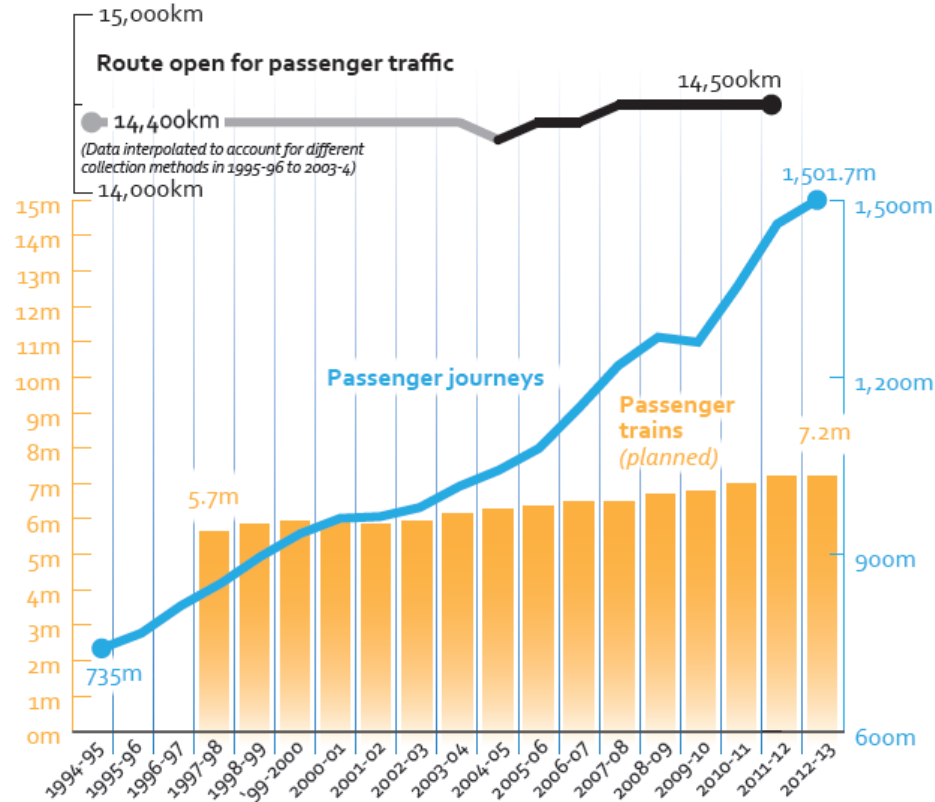


# The case for HS2

- **Key rail routes** connecting London, the Midlands and the North will be **overwhelmed without HS2**. We need to act to increase capacity.
- During the morning peak, there are on average **4,000 people standing on arrival into London Euston**; and **5,000 people standing on arrival into Birmingham**.
- OECD rank the **UK lower than Mexico, Chile and Hungary in terms of public investment in infrastructure** between 2006 and 2011.
- The core cities predict that HS2 will underpin the delivery of **400,000 jobs**
- HS2 will **link 8 out of Britain's 10 largest cities**, serving one in five of the UK population.



# There has been a doubling in rail demand



## 1995-96

Microsoft launches Netmeeting video-conferencing software

## 2002-03

BT MeetMe teleconferencing software launched. Skype launched.

## 2006-07

Twitter launched. 41% of UK employees (in businesses with 10+ employees) use computers and the internet for their work.

## 2009-10

10% of UK workers worked at or from home using a telephone and computer.

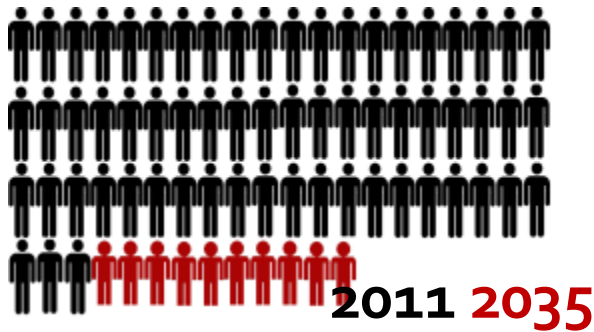
## 2011-12

Citrix release GoToMeeting with HDFaces. 32% of UK adults used the internet for telephone or video calls. 84% have used the internet.

Source: Office of Rail Regulation

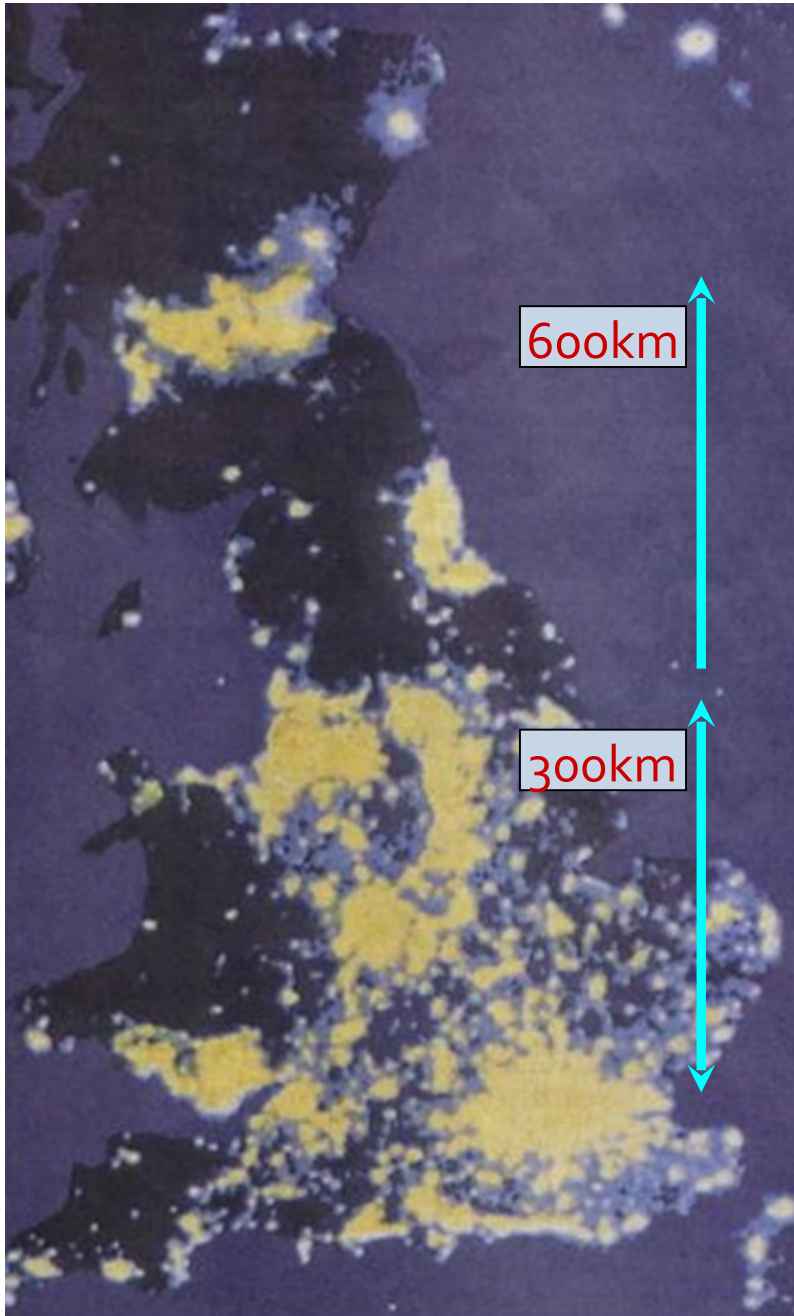
# Continued population growth, more people living in our cities

UK population,  
millions



Source ONS Subregional – population estimates and projections, 2001 to 2021

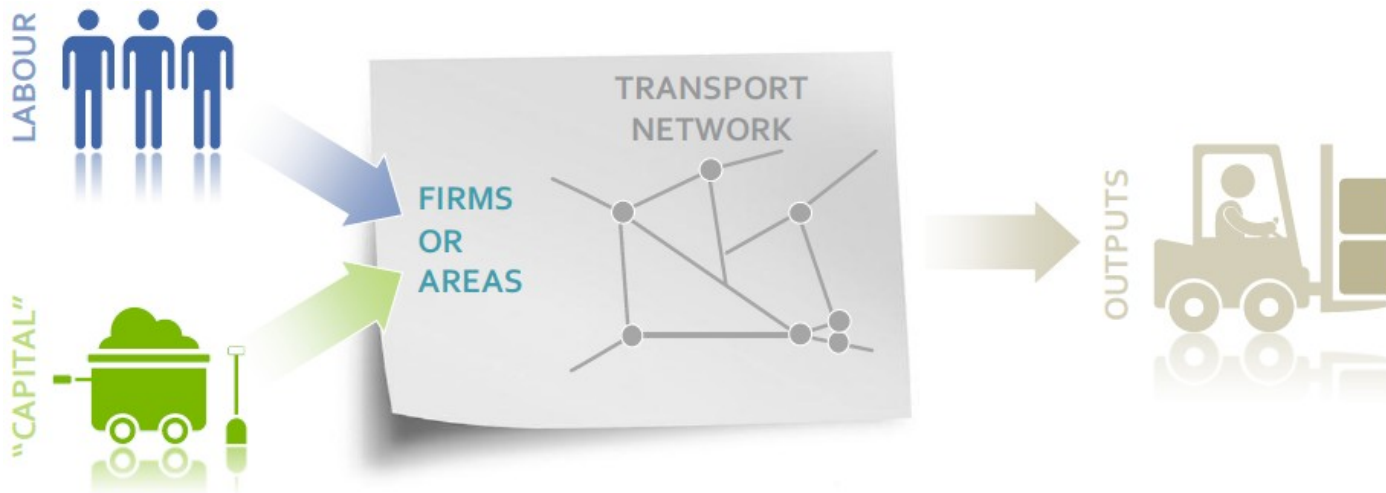
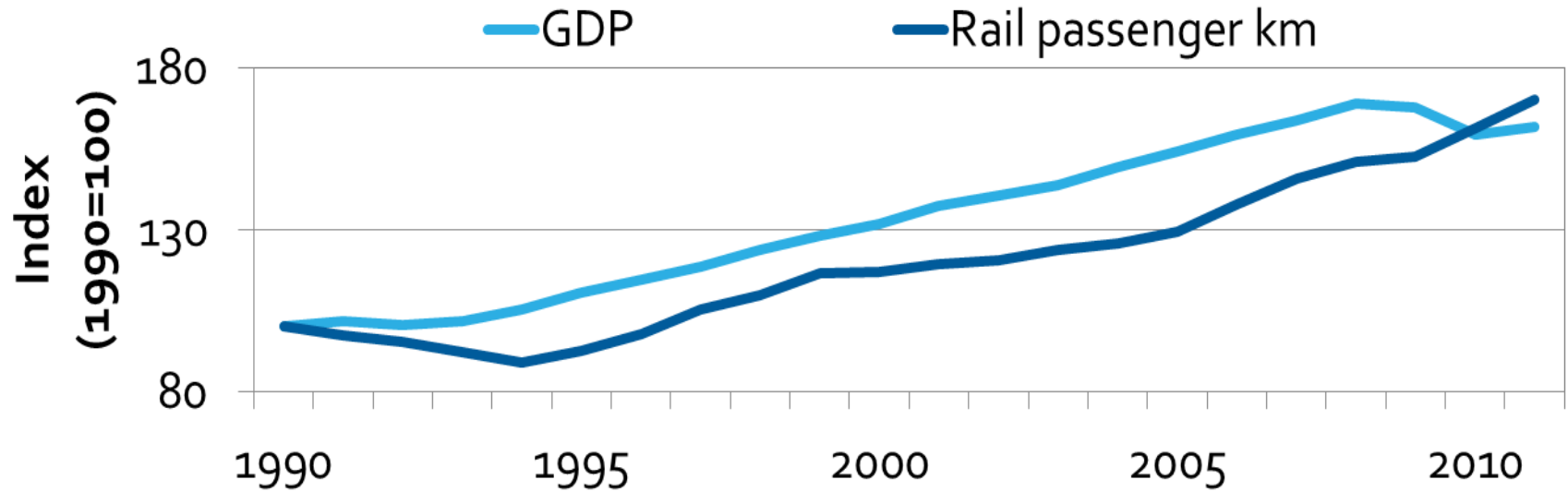
# A Small Country



London to:

- The North East
  - Paris – Lyon
- Manchester / Leeds
  - Paris – Brussels
- West Midlands
  - Frankfurt - Cologne

# Transport matters to the economy



# Our analysis starts with connectivity





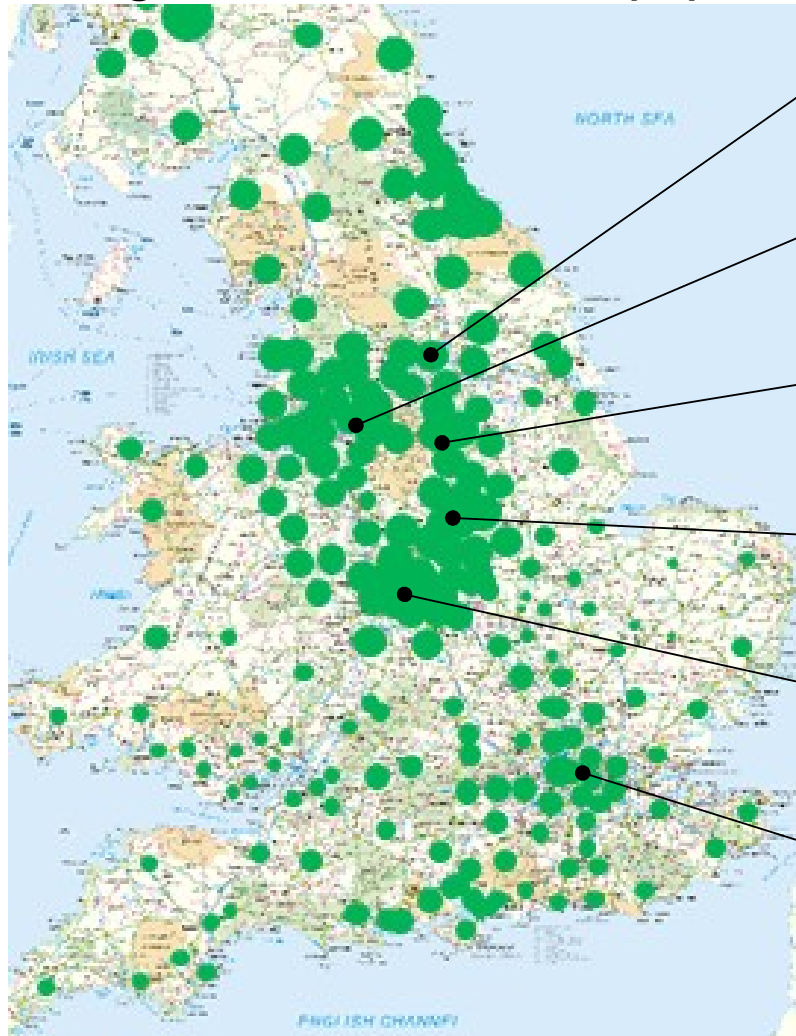
# Changing Connectivity



- London to
  - West Midlands 1-24 to 0-49
  - Manchester 2-08 to 1-08
  - Leeds 2-12 to 1-22
  - Scotland 4-20 to 3-38
- Birmingham to
  - Manchester 1-34 to 0-41
  - Leeds 2-05 to 0-57
  - Paris 4-30 to 3-00

# HS2 delivers significant and widespread improvements in connectivity

## Change in business connectivity by rail



**Leeds**

20%

**Greater Manchester**

19%

**Sheffield**

23%

**Derby & Nottingham**

23%

**Birmingham**

21%

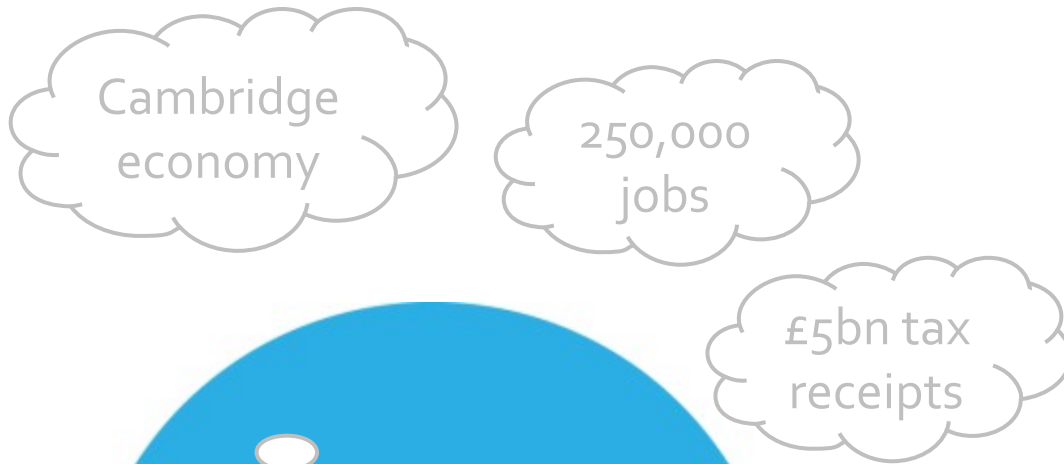
**London**

9%

# HS2 could boost annual productivity by **£15bn**

Total impact for UK economy:

# £15bn



of which results from ...

Rail connectivity to businesses:

## £13.5bn

Rail connectivity to labour:

## £1.6bn

Car connectivity to labour and businesses:

## £0.2bn

\* Note: totals may not sum due to rounding

# Addressing the capacity crunch

- In 2011/12 passengers made around 1.5 billion journeys, almost doubled since 1994/95
- 125 million long distance journeys were made in 2011/12, more than doubled since 1994/95
- By mid 2020s, key routes will be severely crowded
- HS2 provides high frequency and high capacity services
- Up to 18 trains per hour, each carrying up to 1,100 passengers
- Capacity freed up on existing network
- More freight trains using the space freed up on the existing rail network

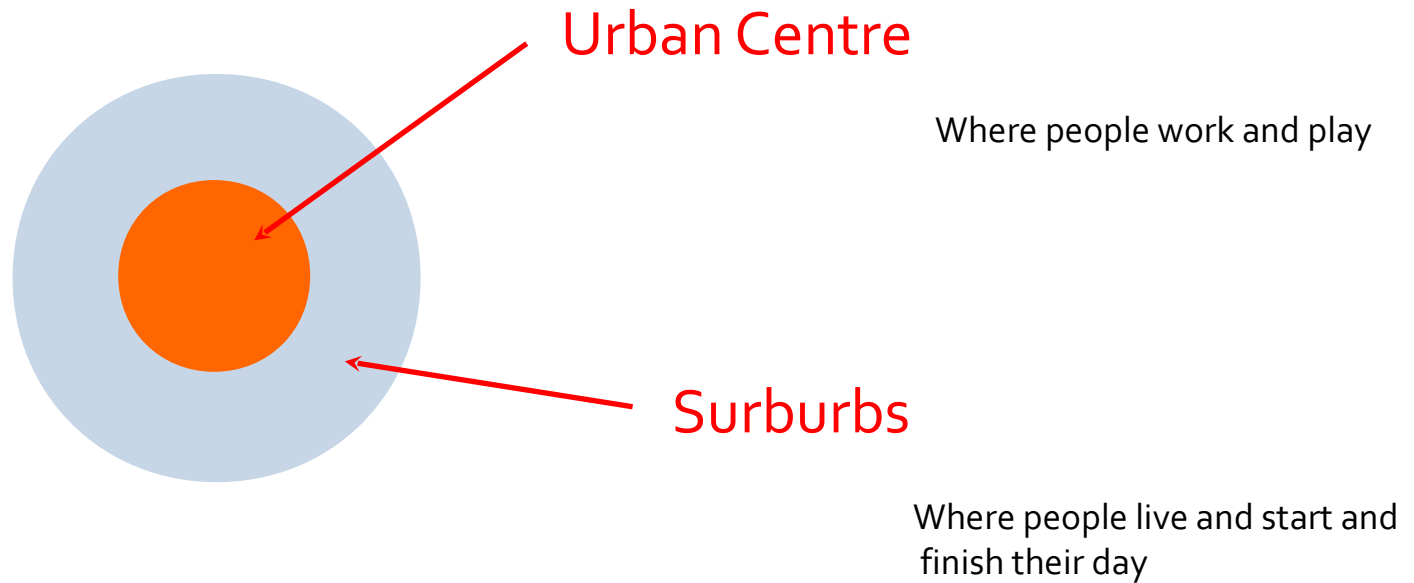


# £9bn London - Manchester Upgrade



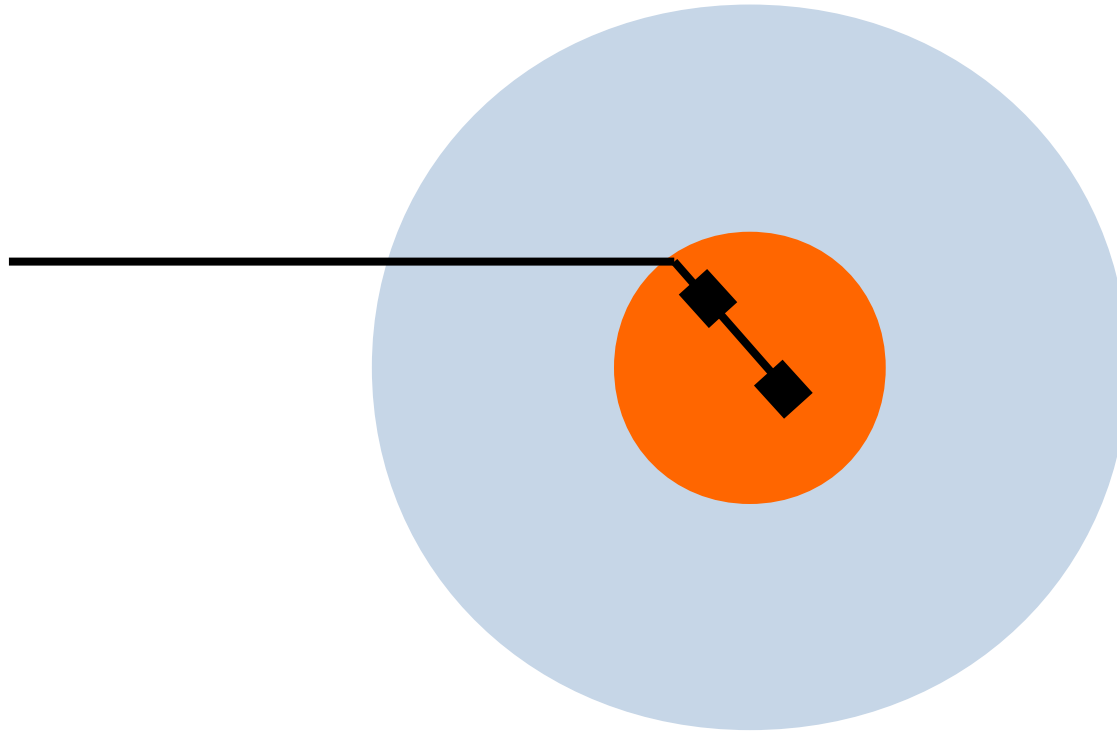
# City Structure and Functions

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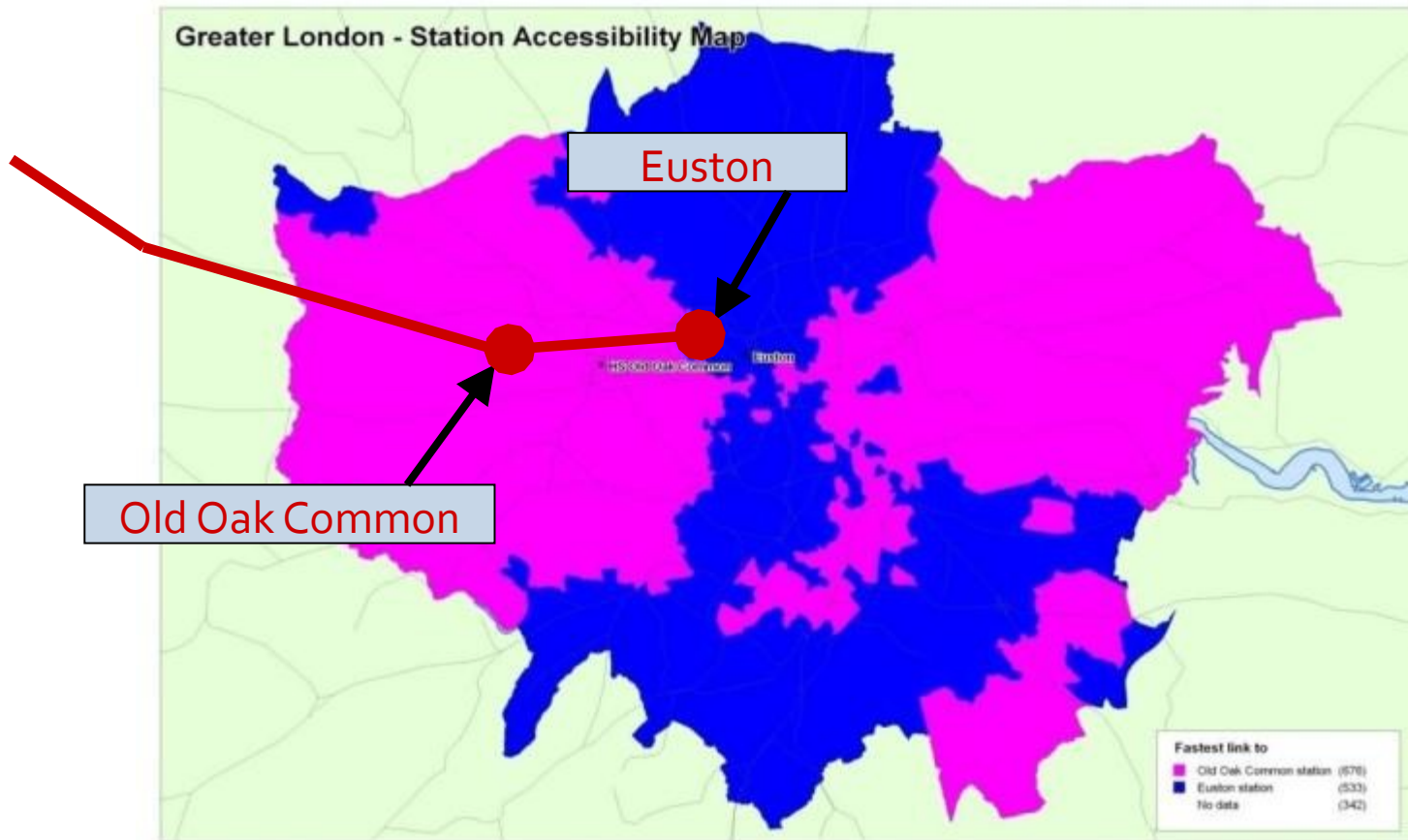


# Metropolis (>~ 5m People)

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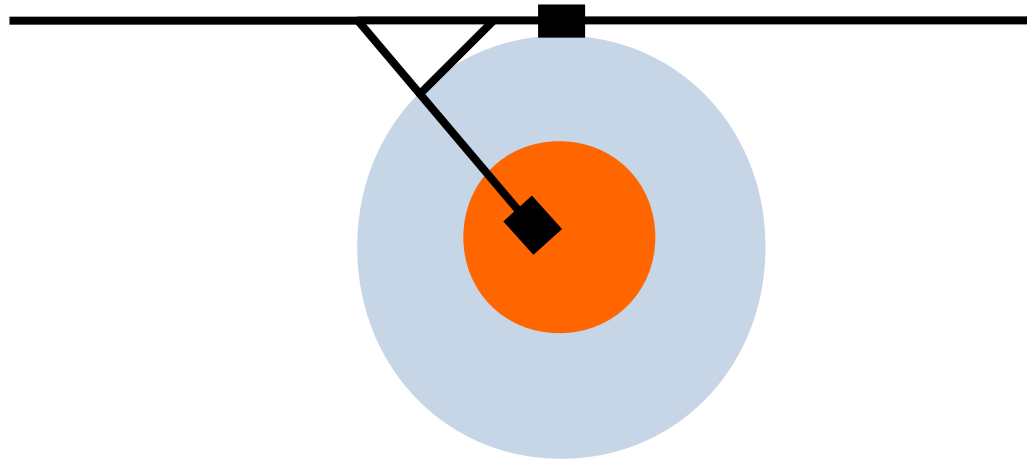
# London - 2 Central Stations





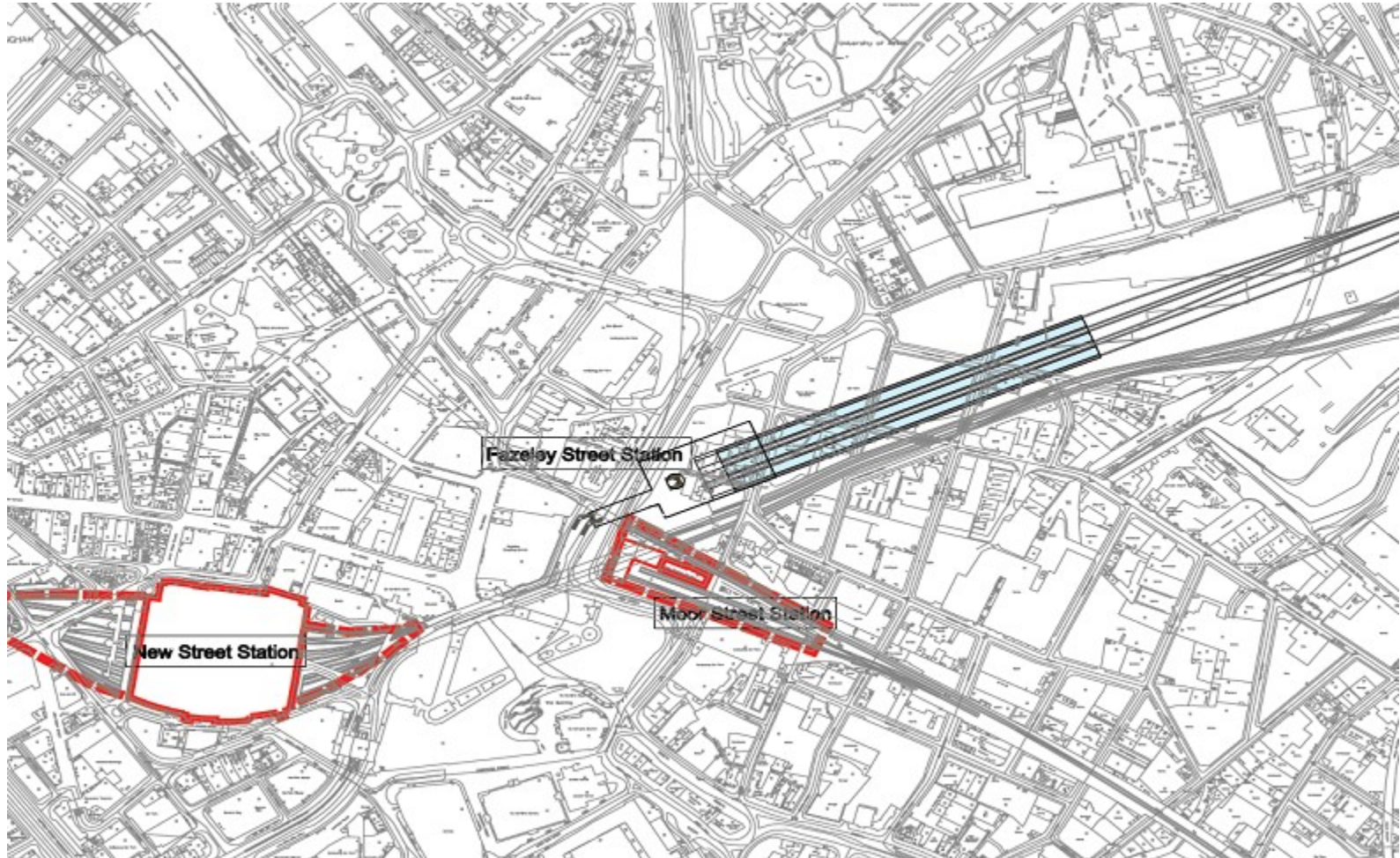
# Large City (~ 2m+ People)

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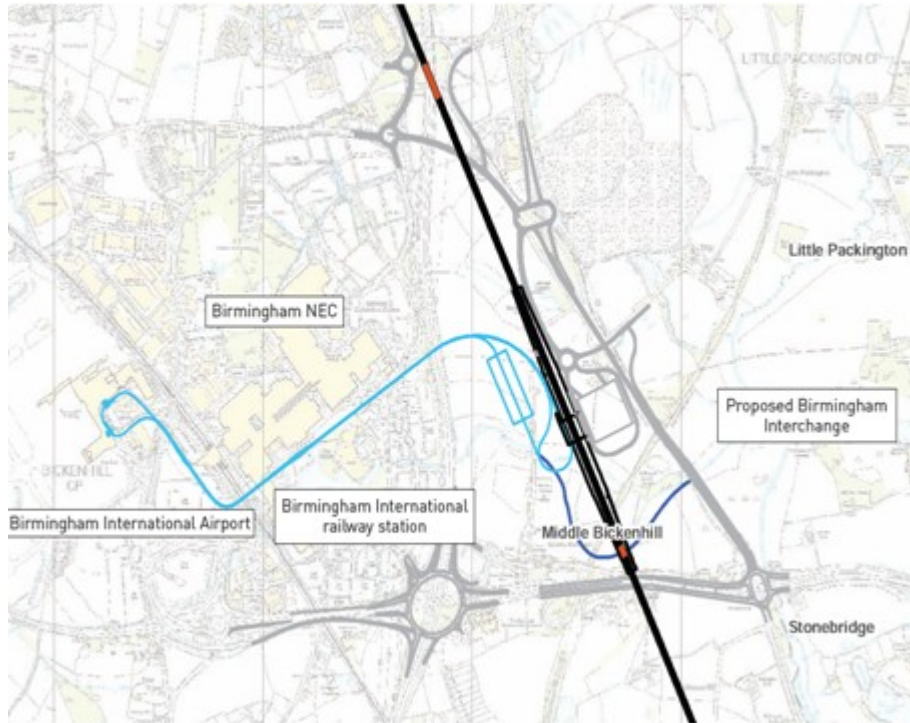
# New Central Birmingham Station

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# West Midlands Interchange

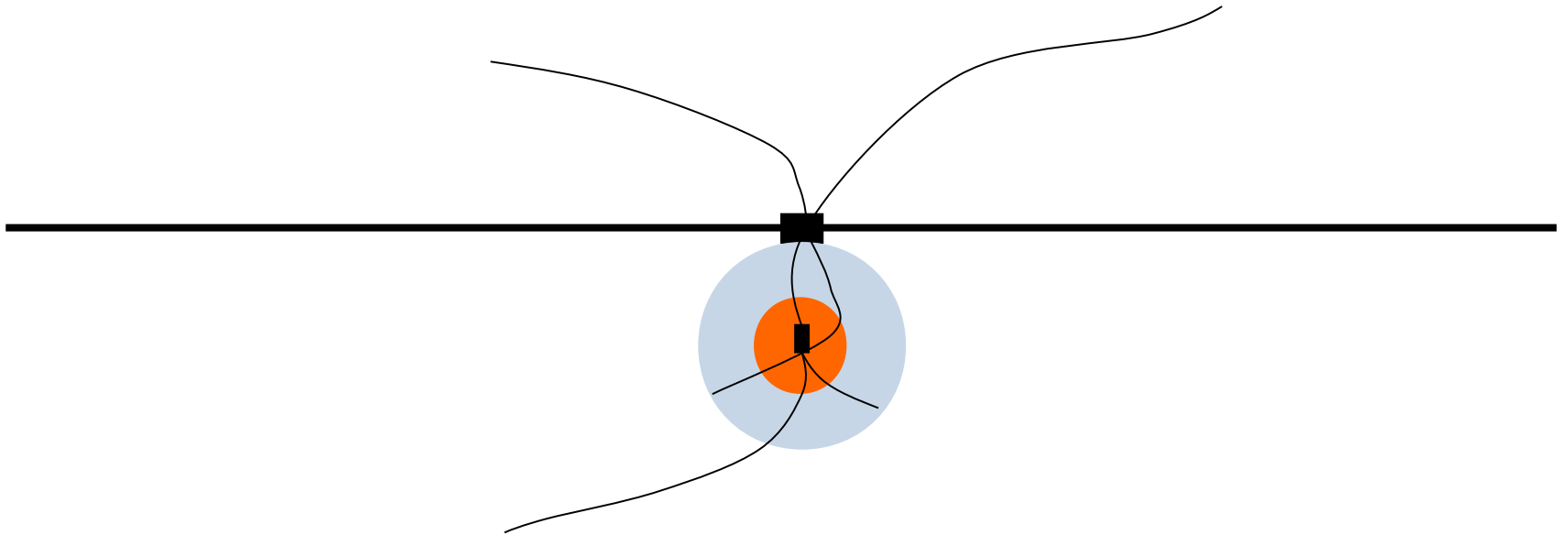
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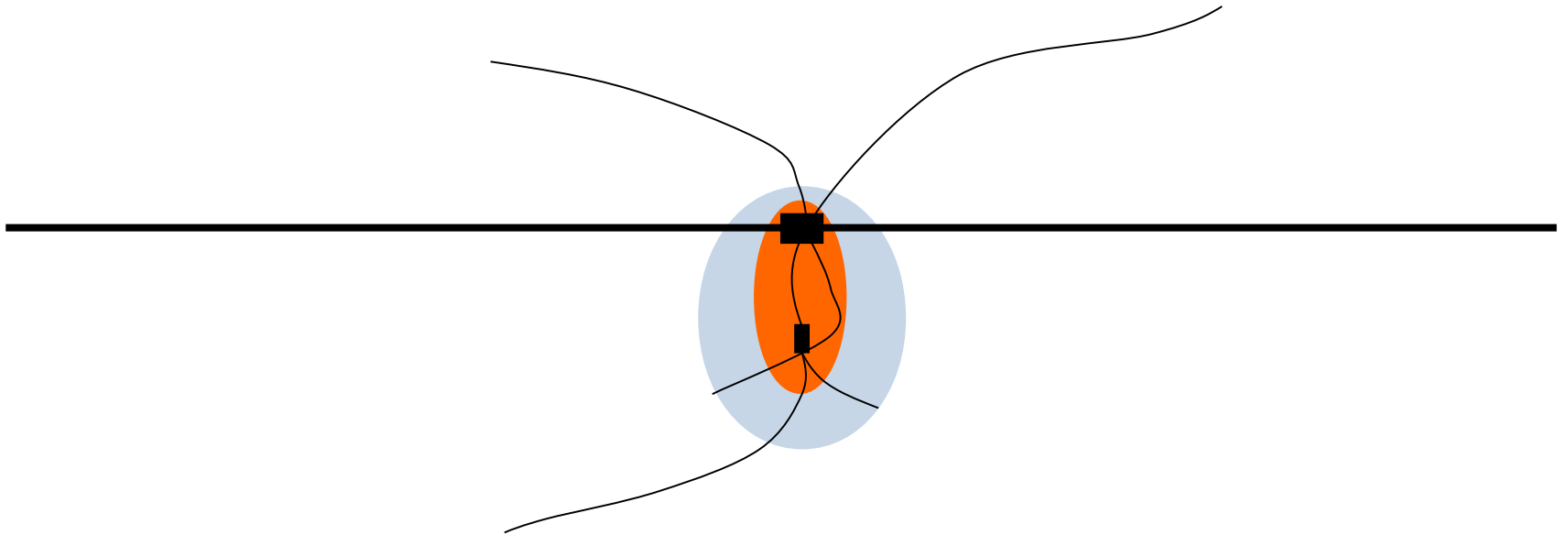
# Not Just a Transport System... ...Changing Cities?

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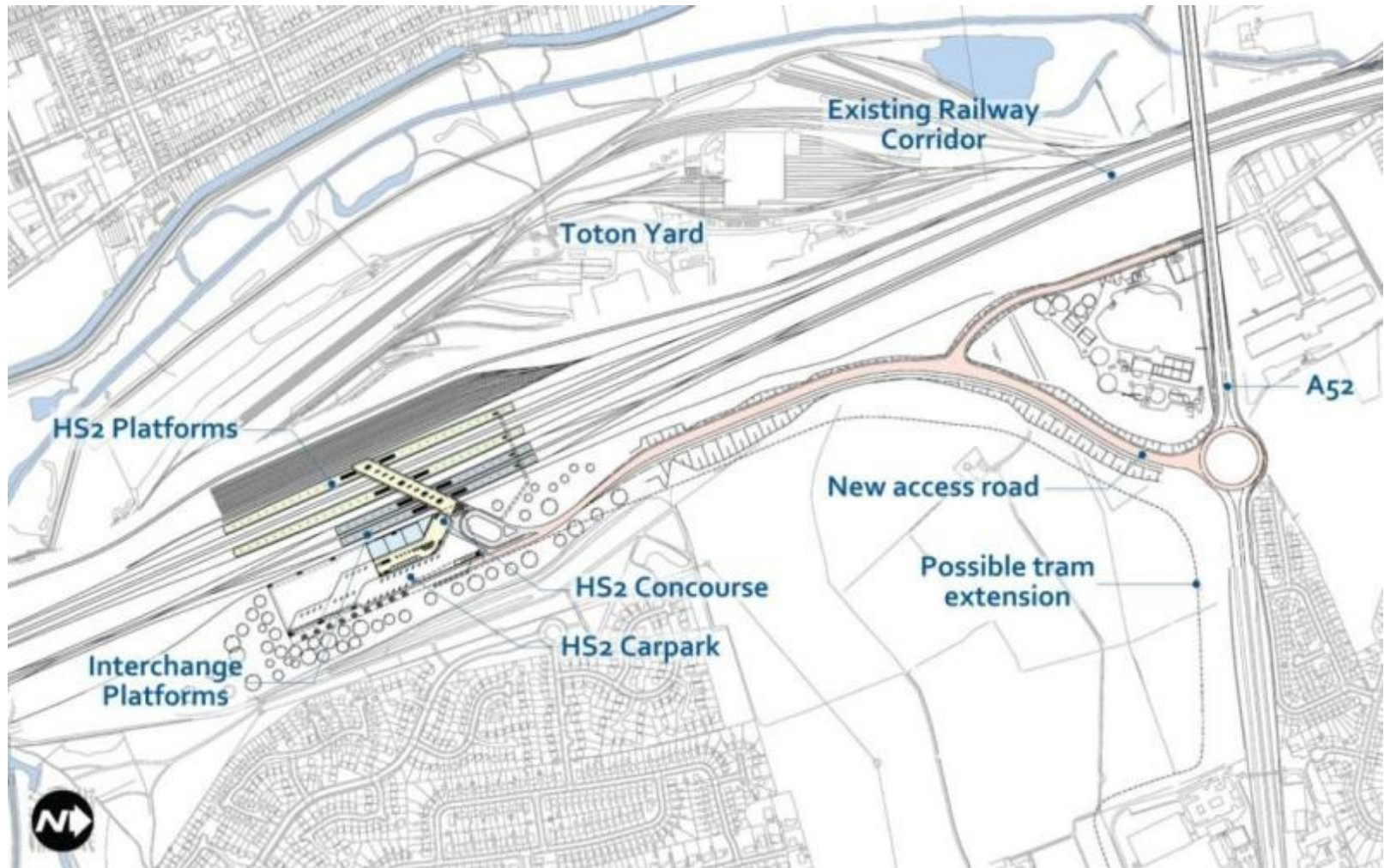


# City Develops to the HS Station

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# Toton East Midlands Interchange



# Position in Landscape is Key

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# High Quality Design Will Be Essential

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# High speed rail and regeneration

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- **HS1** has seen regeneration at Ebbsfleet, Stratford and Kings Cross worth £10bn, plus wider economic benefits of £3.8bn
- **Lille** has developed a major commercial centre around its new station
- **Crossrail** is already affecting investment decisions, and could help create additional residential and commercial value of up to £5.5bn between 2012 and 2021
- HS2 are working in collaboration with the Core Cities, London Boroughs and the GLA and other stakeholders to maximise the regeneration opportunities



# Opportunities around HS2 stations

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- Over-site development
- Working with local authorities on wider opportunities
  - Joining up station with surrounding areas
- Different opportunities at each of the stations



# Sustainability

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- Construction will follow best practice shown in HS1, Olympics and Crossrail
- HS2 will see millions of air and road trips move to rail
- More space for freight on existing lines will mean fewer lorries on the roads
- Independent panel to be set up to advise on design



# Risk and opportunities

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- Challenging timetable
- Cost control
- Funding and financing
- Skills and resources
- Addressing community concerns
- Making the case
- Realising the benefits



# Government commitment

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*"We are in a global race and this Government's decision to make High Speed Rail a reality is another example of the action we taking to equip Britain to compete and thrive in that race. High Speed Rail is a catalyst that will help to secure economic prosperity across Britain, rebalance our economy and support tens of thousands of jobs."*

- Prime Minister David Cameron, January 2013



*"HS2 is the engine for growth in the north and the midlands of this country".*

- The Chancellor George Osborne, January 2013



*"High Speed Two will be a national asset, which is why it is backed by entrepreneurs, passengers, businesses and many local authorities right across Britain."*

- Transport Secretary Patrick McLoughlin, January 2013



**Judged By Future Generations**



**Thank you**

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