Realising the potential
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Big projects, like big ideas, do not come pre-cooked. They have to be continually thought through, not just in terms of delivery, but also their potential to bring about radical change.
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Big projects, like big ideas, do not come pre-cooked. They have to be continually thought through, not just in terms of delivery, but also their potential to bring about radical change.

So, as we have developed our physical and organisational capability to deliver the project, we have also been developing our understanding of how High Speed Two (HS2) can be a catalyst for a fundamental change in Britain – at both a national and local level, and in the way we think about the interfaces between infrastructure, local communities and the environment in which they live and work.

That is the process HS2 has been going through in the four years I have been Chairman of HS2 Ltd. It is a process which has forced everyone involved to challenge their initial assumptions, whether they work for HS2 Ltd itself, in central or local Government, or play a part in regional economies.

The old, underlying assumptions about the traditional economic geography of Britain are being challenged – and that process continues, and will continue. So, whilst there have been many positive developments, other challenges remain if we as a country are to realise the full potential of HS2 and get a full return on the nation’s investment in the project.

Realising that potential will mean ensuring that HS2 is a railway for everyone in Britain and that it really does help rebalance our economy by making it easier for people to use their skills and talents across the country as a whole.

For rail passengers, HS2 services must raise the bar for excellence in transport, providing world class levels of reliability, comfort and customer experience.

Fares on our railways must become simpler and easier for passengers to understand. They must also allow people to travel more across longer distances to realise their full potential, providing greater opportunities for social mobility and increasing national productivity.

The way we design, build and operate HS2, and the planning and investment that it unlocks in local places on the route, must be guided by that principle of making the benefits of Britain’s new high speed railway accessible to everyone. Only then can HS2 transform productivity and economic growth in the Midlands and North.

This report reflects both the progress that has been made and the challenges that remain.

Progress has been made in several areas:

• HS2 is no longer thought of as a standalone engineering project but, increasingly, as both an integral part of the nation’s future transport network and its future economic prosperity.
• Fast, frequent and reliable journeys are no longer seen as an end in themselves but, rather, as a way to make it easier for people to move around the country and so create the critical mass of skills, talent and expertise necessary to help raise levels of productivity in the Midlands and the North of England.

• As such, HS2 is now seen as one of the key elements in redressing the unbalanced nature of our national economy between London and the South East, and the rest of the country. The case for HS2 as a catalyst for growth is moving from debate to reality in local places connected to Phase One. The rapidly changing skyline of Birmingham, the ambitious plans for development around HS2 stations in Solihull and Old Oak Common and the appointment of a master developer at Euston are a powerful testament to how HS2 is delivering real change on the ground.

• Further north on the Phase Two line of route, regions are working to translate the goal for a more balanced national economy into local terms and dynamics to understand how they can each maximise HS2’s potential in their area. They are recognising the benefits of better links not just to London, but to wider regional, national and international markets, and using their particular subset of skills, experience and expertise to differentiate their distinct advantages.

• The vision for fast, frequent rail connectivity between the northern cities, fully integrated with HS2, was set out in the Rebalancing Britain report. Since then, Transport for the North has been working with northern partners, Department for Transport, HS2 Ltd and Network Rail to develop plans for Northern Powerhouse Rail (NPR). In 2017, the Government announced their intention to amend the design for Phase 2b to support future NPR implementation. The Strategic Outline Business Case for NPR will be presented at the end of 2018. Midlands Connect is working with partners to identify the major infrastructure projects needed to improve the region’s connectivity and power the Midlands Engine. Investing in complementary connectivity will spread the growth unlocked by HS2 across the Midlands and the country as a whole.

• Finally, HS2, working with local communities, environmentalists and designers, has accepted the challenge not just of mitigating its impact on the landscape, but of using the corridor it will create down the spine of the country to leave a positive legacy for both wildlife and amenities that can be enjoyed by future generations.

All that represents a significant advance in thinking by and about HS2. However, there remains a series of fairly fundamental challenges which need to be addressed by HS2 Ltd, central and local Government, as well as the wider community at both a national and local level if the project is to fulfil its real potential for Britain and truly be a railway for everyone.

These include:

• The plans for Britain’s future transport network must be future-proofed against changes in the way we will live, work and enjoy our leisure time in the coming decades rather than simply fall back into the reactive, incremental way transport improvements were planned in the past.

• The potential of HS2 to act as the backbone of that new transport network linking both the individual regions with each other and the local with the national must be fully realised.

• The design of HS2 services must reflect and deliver that broader strategy for the national transport network.

• Local authorities, Combined Authorities and Local Enterprise Partnerships must also focus on a broad set of benefits that spread beyond the areas immediately surrounding HS2 stations to deliver for people across our regions.

• Local places on the line of route for Phase Two must act early to realise the full potential of HS2.
Foreword continued

• That should include considering whether dedicated delivery bodies, designed to suit local circumstances, can help to deliver that full potential.

• To realise the full, transformative potential of the eastern leg of Phase Two which will connect the West and East Midlands, Yorkshire and the North East, work should continue to determine the role a Parkway station might play in serving South Yorkshire and the best way to strategically link Scotland, the North West and the North East of England to the network.

• Local and central Government, working with local communities, designers, environmentalists and HS2 should collaborate to deliver and maximise the ‘green corridor’ for wildlife and amenities running alongside the line.

The journey so far

This report is in many ways the culmination of the five previous reports that I have published as Chairman of HS2 Ltd. Those previous reports chart the evolution of my own understanding of HS2 as a transformational investment in our country’s future, informed by the conversations I have had in the past four years up and down the country and by the excellent planning and progress being delivered by our partners in local places and by local and regional transport bodies.

• In HS2 Plus, published in 2014, I argued that to succeed, HS2 cannot be a standalone railway. Success will require HS2 to be integrated into our future transport networks and into our local places and economies. Only then can HS2 truly act as catalyst for balanced growth across the cities and regions of the UK.

• My next report Rebalancing Britain, also published in 2014, developed this thinking by setting out how HS2 could provide the basis for a new national transport strategy. The report presented evidence on the fundamentally unbalanced nature of the UK economy and stressed the need to achieve economic rebalancing in an equitable way. I also recognised that improvements to north-south and east-west connectivity are of equal importance, at a time of when momentum was building behind the Northern Powerhouse.

• The importance of HS2 in shaping local places was in the spotlight in two reports I published in 2016 titled HS2: Changing Britain and Changing
Britain: HS2 Taking Root. These reports showed how local places were already planning and investing to prepare for the arrival of HS2 in their areas.

- Last year’s report HS2: Getting the best out of Britain presented evidence on the role that improved transport connectivity can play in helping to raise levels of productivity and growth in sectors and places across Britain. The report was informed by a series of workshops we held up and down the country. Each workshop brought together representatives from business, local authorities and universities.

In HS2 Plus I set out five criteria by which the project should be judged. It said it should:

- stand the test of time;
- be the right strategic answer;
- be integrated with existing and future transport services;
- maximise the value added to local and national economies; and
- be a catalyst for change both locally and nationally.

Four years later, our understanding of the size, complexity and significance of those criteria is deeper and more fully formed, but as a measure of success I am not sure I would disagree with that list in this, my final report as Chairman.

In this report, I will set out my assessment of the progress we have made on these issues and issue the challenges that remain to be addressed. These will be grouped under three themes:

- Embedding HS2 in a national transport strategy
- Using HS2 as a catalyst for balanced growth
- Delivering on the potential of HS2

HS2 remains not just a huge task, but also a hugely important one for the country – and one that all those involved need to get right. This report tries to set out where we are in matching that ambition and the task of delivering not just the first major railway north of London in over 150 years, but an economic, cultural and environment legacy that will realise its full potential and so stand both the test of time and the judgement of history.
Overview – Realising the full potential of HS2
Thinking big, bold, long term and avoiding incrementalism

HS2 is an amazing opportunity, with huge potential to completely reshape not only the way we travel across the UK, but also the future of our economy, our communities, our regions and our local places.

Fast, frequent and reliable services will directly connect eight of 10 of Britain’s largest cities, as well as providing much needed extra capacity to free up space on our increasingly crowded railways. HS2 trains will serve over 25 stations connecting around 30 million people. That’s almost half the population of the UK. These improved connections will open up new opportunities for businesses to access markets, supply chains and sources of knowledge and innovation, helping to raise levels of productivity and growth in regions across the UK. HS2 will also better connect people to opportunities for work, education and leisure, both directly and by creating space on the existing rail network for additional local and regional services.

HS2 is an investment in the long-term future of the UK. Its benefits will be enjoyed by future generations, just as we today continue to benefit from the Victorians’ investment in the infrastructure of our country. The original London to Birmingham railway was completed in 1838 with onward connections added to Manchester and Liverpool. This infrastructure forms the basis for today’s West Coast Main Line, Europe’s busiest mixed use railway. As we approach the third century of the West Coast Main Line, it is vital that we think about the potential benefits that HS2 will bring, not just in the 2020s and 2030s when HS2 will begin operations, but for many decades to follow.
Japan offers a vision of how high speed rail has transformed travel and patterns of economic activity by providing the major transport artery that links major city regions. The first Tōkaidō Shinkansen line linking Tokyo and Osaka cut journey times and provided a step change in capacity. Today this line carries almost half a million people a day with superb levels of reliability. HS2 offers the potential to deliver the same transformational benefits to the UK, with a network that in many ways resembles the Tōkaidō line, providing a fast, high capacity backbone to the UK’s transport network that delivers world class reliability. Success will require HS2 to be a railway that is accessible to everyone, maximising the benefits of improved connectivity between our cities and regions. This principle should guide the way we design and deliver the railway, from stations that allow for easy interchange between HS2 and other transport modes, to trains that deliver excellent passenger experience.

The business case for HS2 assumes that the same fares are charged across the HS2 network and the existing rail network. Ticketing and fares need to be made simpler and more transparent to encourage people to travel by rail. There are now around 55 million different fares on Britain’s railways and passengers report low levels of confidence that they bought the best value ticket for their last journey. I am pleased to see that train operating companies recognise that the range of fare options has not kept pace with technology or how people work and travel today. Working with independent watchdog Transport Focus, the rail industry is consulting the public on what a future range of fares should look like.

**Continued on Page 16**

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*High Speed Two, in our view, should be the centre-piece of a long-term national transport strategy. In our recent report Beyond HS2, we looked across the whole nation at what is needed by 2040. With shared objectives of higher productivity, reduced regional inequality and overcoming congestion, we found measures to complement HS2: a start to address the key challenges set out in this report.***

Jim Steer, Director, Greengauge21
A closer look

Parallels between Japanese high speed rail and HS2

Japan’s Tōkaidō Shinkansen, the world’s first high speed rail line, revolutionised transport and the economy of Japan. The Shinkansen forms Japan’s ‘Main Artery’, providing fast and high capacity connections between Tokyo, Nagoya and Osaka, and acting as the lifeblood of the economy.
Prior to the opening of the Shinkansen, the 515km journey between Japan’s two biggest cities of Tokyo and Osaka took seven hours. In 1964, the Shinkansen reduced that time to four hours. During the past half century, the performance, technology and operations of the Tōkaidō line have been constantly refined. Today the fastest service takes just 2 hours 25 minutes and carries more than 450,000 people a day with reliability that is measured in seconds.

HS2 will bring this step change in travel to the UK. HS2 takes much of its inspiration from the Shinkansen, providing high capacity, fast, frequent and reliable services between our largest cities. It will form the backbone of the UK’s future rail network, with highly integrated connections with conventional rail and other transport modes to serve a wide area of the UK beyond those areas directly connected to the HS2 network. This mirrors a masterplan drawn up for the Shinkansen network in the 1970s, designed with the intention that everyone would be able to access the Shinkansen within one to two hours. This masterplan still forms the basis for authorising new lines or extensions to existing lines.

The Shinkansen has also become a central feature of Japan’s economy and cultural life. It has brought large cities much closer together, shifting business patterns, uniting firms and suppliers, supporting collaboration, trade, commuting, leisure, and tourism. It has also seen significant commercial development and housing along the route. Since its birth in the 1960s, the Shinkansen network has now been expanded to cover much of Japan.

The Japanese experience shows the potential of HS2 to completely redefine the transport experience and the future geography of the UK economy. HS2 will benefit from 50 years of international experience with high speed rail, as well as the latest technology, as we bring this new level of service to the UK.

The potential for change is enormous.
Tōkaidō Shinkansen

Japan’s Main Artery
World’s first high speed railway

The ‘New Trunk Line’ provides high speed high capacity passenger transport between Tokyo, Nagoya, Kyoto and Osaka

Key
- JR Central

Route
- 320 miles (515km) of dedicated high speed track

Max speed
- 285km/h

Journey time
- Tokyo to Osaka:
  - 2 hours 22mins (today’s fastest service)
  - 4 hours (1964)
  - Original journey took 7 hours

Opened
- 1964
  - Regular upgrades over past 50 years

Services a day
- 365

Daily passengers
- 452,000 (2017)

Coverage
- JR Central: 60% of Japan’s population
  - 65% of Japan’s GDP
High Speed Two

Future backbone of the UK
Dedicated Y-shaped high speed rail network from London to Birmingham, Manchester, East Midlands and Leeds

Onward travel on conventional rail network to destinations including Wigan, Preston, Liverpool, Glasgow, Edinburgh, York, Darlington and Newcastle.

Key
- New station (Phase One)
- New station (Phase 2b)
- Destinations served by HS2 service
- HS2 line (Phase One)
- HS2 line (Phase 2a)
- HS2 line (Phase 2b)
- HS2 services on existing network

Route

350 miles
(553km) of dedicated high speed track. Together with onwards services via conventional rail to North West, North East and Scotland.

Max speed

360km/h
(On high speed network, track designed to 400km/h)

Journey time

<table>
<thead>
<tr>
<th>Destination</th>
<th>Time</th>
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<tr>
<td>London to Birmingham</td>
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<tr>
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<td>1 hour 7 mins</td>
</tr>
<tr>
<td>London to Leeds</td>
<td>1 hour 21 mins</td>
</tr>
<tr>
<td>London to Glasgow</td>
<td>3 hours 40 mins</td>
</tr>
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Opens

2026
(Phase One)

2033
(Phase Two)

Services a day

Up to 768

Daily passengers

Over 300,000
(2037)

Coverage

Directly serving eight of 10 largest cities. Around half of the UK’s population (30m), employment and economy.
This report reflects on the huge progress that has been made in turning HS2 from concept into reality. When I took up the role of Chairman of HS2 Ltd in January 2014, the Bill to secure powers to construct Phase One of HS2, connecting London to the West Midlands had only recently been submitted to Parliament. The second Phase of HS2, connecting the West Midlands to the North-West, the East Midlands and Yorkshire, was in its early stages of planning.

Today, working with our partners in central and local Government, we have secured powers for Phase One and construction activity has begun. The hybrid Bill to secure powers for Phase 2a, which will extend the high speed network from the West Midlands to Crewe in 2027, received a commanding majority at its second reading in the House of Commons, a sign of the cross-party support HS2 enjoys – support that we do not, and never will, take for granted.

Last year, the Government confirmed the route for Phase 2b and we are working hard to prepare the Phase 2b hybrid Bill for submission to Parliament.

In July 2017 we awarded £6.6 billion of Main Works Civils Contracts for Phase One. These will support 16,000 jobs and create 7,000 contract opportunities in the supply chain, 60% of which we expect to go to Small and Medium-sized Enterprises. The National College for High Speed Rail opened two campuses, in Birmingham and Doncaster, in October 2017, with the capacity to train 1,000 students a year. In January 2018, applications opened for the first £1 million of a £7 million HS2 Woodland Fund.

The debate over the benefits of HS2 for our local, regional and national economies is also shifting, prompted by evidence of the benefits already being delivered in places along the Phase One and 2a lines of route. When I joined HS2 Ltd as Chairman in 2014, the business case for investing in HS2 was strong and we enjoyed support from civic leaders and local authorities along our line of route. However, finding irrefutable evidence of the transformational potential of HS2 proved a challenge. After all, in Britain we have not embarked on a transport investment of this scale and ambition since the construction of the motorways.
Fast forward to 2018 and HS2 is already delivering investment and jobs and providing the catalyst for local places to bring forward ambitious plans for regeneration and growth in London, the West Midlands and around Crewe, Stoke and Stafford:

- In **Birmingham and the wider West Midlands region**, the arrival of HS2 in 2026 has provided a renewed sense of confidence and dynamism to the city’s economy. Foreign direct investment into the region has surged, small and medium-sized businesses are thriving and the Birmingham commercial property market is experiencing unprecedented levels of investment. The Birmingham city centre office market saw leasing activity exceed one million square feet in 2017, with strong demand for office space leading to construction activity of new office space that tied with the record high set in 2016 of 1.4 million square feet under construction. Construction of residential units in Birmingham city centre also hit record levels in 2017.

- The **UK Central Hub** in Solihull is a concentration of global businesses and strategic economic assets, including the HS2 Birmingham Interchange station. HS2 is accelerating the pace and scale of planning and investment in the area. Plans have been developed to connect the area to the Metro tram network, through East Birmingham and North Solihull, stopping at Birmingham Business Park, the existing Birmingham International station and the HS2 station. This will give people better access to jobs, education, healthcare and other facilities. The area is raising its profile for UK and international investors. Global construction and support services firm Interserve has opened its new regional headquarters at UK Central Hub, in anticipation of HS2’s arrival. Merlin Entertainment is investing £20 million in a new adventure park and construction will begin shortly on a new hotel facility.

“With the onset of HS2 Birmingham is experiencing investment in infrastructure at an unprecedented scale. Not only will HS2 improve connectivity and journey times to London, but it will be the catalyst for what will be one of the largest urban regeneration schemes in the UK transforming over 140 hectares of the city centre.”

Waheed Nazir, Corporate Director, Economy, Birmingham City Council
• **Old Oak Common** station in west London will provide an interchange between HS2, Crossrail and Great Western Main Line services. The prospect of excellent connectivity is already acting as a spur to develop ambitious regeneration plans in the area. Government has agreed in principle to transfer 97 hectares of central Government publicly owned land to the Old Oak and Park Royal Development Corporation (OPDC), making OPDC the largest landowner in the core development area. OPDC is driving forward plans for a new commercial and office hub focused around a new Old Oak Common station, providing the opportunity for 55,000 new jobs, as well as well-connected neighbourhoods providing around 25,000 new homes.

• At Euston, Government has appointed LendLease as the Master Development Partner. They are working with the Greater London Authority and London Borough of Camden to develop a masterplan for the 54 hectare station site and take forward opportunities for sustainable mixed-use development that could unlock over 4 million square feet of development space and up to 1,700 new homes and 19,000 jobs around the wider station site.

• The **Constellation Partnership area**, covering areas in Cheshire and Staffordshire including the HS2 station at Crewe, has developed a growth strategy to capitalise on HS2 and create 120,000 new jobs by 2040. The area around Crewe station alone has the capacity for 3,750 new homes and 20,000 new jobs.

Building on the tremendous progress made so far, this report also looks to the future. Realising the transformational potential of HS2 for generations to come will require vision, planning and a continuing need to keep our eyes fixed on the prize that HS2 offers. Maximising the benefits will require us all to continually check and challenge whether we are being ambitious in our thinking and plans. It will also require us to work together to ensure we are all equipped to deliver on those ambitions. To help guide this process, I am issuing a series of challenges. Working in partnership to address these challenges now will ensure that in decades to come, we can reflect with satisfaction and pride on the transformation that HS2 has delivered for our country.

*“Constellation Partnership is about future planning. It’s very much about 2040 and is underpinned absolutely by the concept of high speed rail.”*

Cllr Rachel Bailey, Leader, Cheshire East Council
Collectively, we need to avoid the trap of thinking about HS2 as an incremental improvement to the status quo and instead work together to deliver transformational change.

The ambition for HS2 to act as a catalyst for growth must be reflected in the way we design, build and deliver Britain’s new high speed railway. This ambition must be reflected in everything we do, from ensuring our stations contribute to regeneration and a sense of place that fit with local visions, to working with our supply chain, education and training providers and local communities to deliver a legacy of skills and new capabilities in the construction and rail sectors that will outlast construction of HS2.

The time for us to define our ambitions and plan for their delivery is now. We are less than a decade from the opening of Phase One of HS2. Experience from other high speed rail schemes shows the benefits that early planning can bring, but also the risks of unfulfilled potential if planning happens too late and in a piecemeal fashion.

Phase One of HS2 will see high speed services running not just between London and the West Midlands, but also continuing on to Crewe, Manchester, the North West and Scotland using conventional lines. The HS2 programme includes plans for works to prepare the conventional rail network for HS2 services. Successful delivery will require continued close working between HS2 Ltd and Network Rail.

**Challenge #1:**
Planning should start now for how best to shape the wider transport network around the new high speed backbone that HS2 will provide.

This planning should look beyond incremental changes to services on the wider rail network and ensure that HS2 forms the basis for a new national transport strategy that is fit for the 21st Century. Making a success of HS2 will require continued close working between the Government departments responsible for transport, local growth and housing, industrial strategy, and skills and education.

**Challenge #2:**
Transformational change will only be delivered by focusing on a broad set of benefits that spread beyond the areas immediately surrounding HS2 stations to deliver for people across our regions.

Local places, supported by Government, are making real progress in developing plans to reap the benefits that HS2 offers. These plans continue to develop, particularly in places along the line of route for Phase Two of HS2. Targeted delivery plans should be anchored by a vision for how improved transport connectivity can help places to build on their economic strengths, support the growth of their businesses and sectors and enhance their attractiveness as places to live, work and invest. Regeneration plans around stations should go hand-in-hand with improvements to local and regional transport networks, investments in skills and innovation and support for small and medium sized businesses.
A closer look

**Acting as a catalyst to deliver early benefits to Birmingham and the West Midlands**

In Birmingham and the wider West Midlands region, the prospect of HS2 providing fast, frequent and reliable connections to other city regions across the UK and to international gateways is already helping to attract significant investor interest and provide a further boost to the region's fast growing economy.
The West Midlands is expected to be the fastest growing regional economy in the UK outside of London and the South East from 2017 to 2020. The region is increasingly attractive to inward investors. The West Midlands region attracted 151 Foreign Direct Investment (FDI) projects in 2016/17, up from 57 projects in 2011/12. This inward investment created more new jobs in the West Midlands than in any other region in the UK outside of London (over 6,500 jobs in 2016/17).

Birmingham City Council and the West Midlands Combined Authority have played an instrumental role in raising the profile of the region with global investors. The West Midlands Growth Company works with Local Enterprise Partnerships, local authorities, universities and a range of private sector bodies to promote the region. Birmingham was voted as having the best FDI strategy of any large European city by global inward investment magazine FDI Intelligence.

Alongside large global companies, the West Midlands is home to a thriving ecosystem of small and medium-sized businesses. Over 17,000 new companies were registered in Birmingham in 2016, the most of any UK city outside London. Birmingham’s growing digital cluster is bolstered by having access to 18 universities, all within an hour’s drive of the city.

Growing confidence in the prospects of the West Midlands economy is evident in the strong performance of the region’s property markets. Real estate advisors Deloitte, surveying the Birmingham city centre property market during 2017, stated that “Birmingham is undoubtedly in a new era of redevelopment and repurposing, spurred on by the arrival of HS2”. In addition to major developments already underway, Birmingham City Council will appoint a development partner this year to begin development of a 17 hectare site at Smithfields near the Bullring.

Looking ahead, real estate advisors JLL expect greater housing development activity over the next few years in the West Midlands, responding to strong demand and citing the growing number of businesses and firms moving to Birmingham and the attractive quality of life on offer for workers.

### Birmingham: Total office volume under construction (sq ft)

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Source: Deloitte Real Estate
Responding to tomorrow’s needs and challenges

HS2 is the right long-term answer to address two important problems with Britain’s transport network.

Our railways are increasingly congested. Despite repeated investment in our railways, capacity has not been able to keep pace with rapid growth in demand. Passenger numbers on Britain’s railways have more than doubled since the mid-1990s. A costly and disruptive upgrade to the West Coast Main Line added significant capacity, but a decade after its completion two-thirds of the extra seats created by the upgrade have been taken by rising passenger numbers.

At the same time, connectivity is relatively poor in the Midlands and North of England compared to London and the South East. Travelling the 40 miles between Bradford and Sheffield by rail takes a minimum of 1 hour and 16 minutes. Average speeds for rail journeys within the Midlands are often slow. For example, a 52-mile rail journey from Birmingham to Nottingham takes 1 hour and 9 minutes. A comparable rail journey between Southampton Central and Reading of 50 miles is around 20 minutes faster.10

Passenger numbers on Britain’s railways have more than doubled since the mid-1990s.
These constraints in Britain’s transport network contribute to an economy that is regionally unbalanced. The report HS2: Getting the best out of Britain presented evidence that cities and regions in the Midlands and the North possess real strengths such as world class universities and research centres, as well as highly-skilled manufacturing clusters and cutting-edge technologies. However, relatively poor connectivity limits access to markets, skills, knowledge, finance and international gateways for businesses based in the Midlands and North. The result is large disparities in economic performance between our regions. The most productive area of the UK is almost three times more productive than the least. Raising productivity in all of our cities and regions can help the UK to close its productivity gap with other major economies and deliver prosperity for people all across our country.

HS2 will add badly needed new capacity, increase the frequency and reliability of connections, and substantially reduce journey times between and within regions in the Midlands and the North, as well as to and from London. In this way, HS2 will improve productivity by providing businesses in the Midlands and North with access to a critical mass of skills, services and supply chains, providing a basis on which the country can build as it prepares to exit the European Union.

Core Cities UK Leaders and Mayors believe HS2 is of enormous economic benefit to all our cities, even those not directly on the route. It will pay for itself many times over. And there is no reason why HS2 should be the end of the story, we believe it can be a first step towards high speed rail for the whole of the UK.”

Cllr Nick Forbes, Core Cities UK
Vice Chair and Leader of Newcastle City Council
The case for investment in HS2 is firmly grounded in today’s challenges of rising levels of crowding and relatively poor transport connections in the Midlands and North, which contribute to a regionally unbalanced economy that is failing to fulfil its potential. However, as we prepare to seize the opportunities that HS2 offers, it is important that we all have our eyes fixed on how the way we live, work and enjoy our leisure time will change in the decades to come.

Predicting the future is always fraught with difficulties. The one thing we can be certain of is that the world 30 years from now, and beyond, will be very different to today’s world. The world today would in many ways be unrecognisable to someone living in the 1980s. Next year the Internet will be 30 years old and it has transformed the way we all work, communicate, learn and interact with the world. It is only 33 years since the UK’s first mobile phone call was made. In the 1980s UK cities were still experiencing falling population numbers, yet cities accounted for three-fifths of UK population growth between 2000 and 2011. The structure of the British economy has also shifted over the last three decades, with the services sector accounting for a growing share of jobs and economic output.

Transport networks must encourage those contacts and support collaboration in sectors that rely on research, innovation and skills for their competitive advantage. Transport investment must be designed and delivered to connect the growth sectors of the future. In the past, stations have too often acted as eye sores, but examples such as St Pancras and the redeveloped Birmingham New Street show how well-designed stations can act as focal points for economies and communities in our cities.

**Challenge #3:**

**Britain’s future transport network must be future-proofed to support the way we will live, work and enjoy our leisure time in 2050 and beyond.**

Long-term trends in our economy, society, demographics and technologies pose challenges for the design of the future transport network, with HS2 as its backbone. We need to plan on the basis of door-to-door journeys that allow for easy interchange between modes of transport, smart ticketing and deliver final mile connectivity between HS2 and the destination of future travellers. This integration will need to allow for changing technologies, with the prospect that connected and autonomous vehicles will dominate the manufacture of new cars by the 2030s.

Our economy, society and local places will continue to change in the decades ahead, as will our needs for future transport and travel. Long-term, transformative investments in our future transport infrastructure, such as HS2, will be vital in responding to meet those needs and future challenges. Cities are likely to become increasingly important as generators of wealth and employment, reflecting the growth of knowledge-based sectors that thrive on face-to-face contact.
Our investments and plans will also need to account for changing demographics. The share of the population aged 65 or over is projected to increase from 18% today to 25% by 2046, leading to growing demand for leisure travel among retirees. Today’s young people have different expectations for how and where they want to live and work. The UK’s largest cities have witnessed a return to city centre living since the 1990s, driven by increasing numbers of students and of graduates under the age of 35 who are attracted by the vibrant cultural offer and proximity to job opportunities. Young people are less likely to have full driving licences and drive fewer miles than previous generations of young people, placing a premium on access to high quality public transport.

“HS2 is not a standalone end in itself, but rather a catalyst for a much bigger process of change – it is one essential element in a strategy for transforming our transport system and therefore economy as a whole.”

Sir David Higgins, Chair, HS2 Ltd
Rebalancing Britain

The share of the population aged 65 or over is projected to increase from 18% today to 25% by 2046
Embedding HS2 in a national transport strategy

HS2 is unlike other transport projects – it represents a step change in capacity, connectivity and reliability.
Understanding the transformative potential of HS2 starts with understanding how the new high speed railway will deliver a step change in capacity, connectivity, and reliability for Britain’s transport network.

HS2 will deliver a step change in reliability

Responsibility for delays on services operated by Virgin trains (West Coast)
Moving annual average 1 April 2017 – 31 March 2018

<table>
<thead>
<tr>
<th></th>
<th>Network Rail</th>
<th>Other passenger train operators</th>
<th>Freight train operators</th>
<th>Virgin Trains</th>
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<tr>
<td>18.0%</td>
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<td>4.5%</td>
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<td>65.4%</td>
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When the network is completed in 2033, HS2 will:

• provide over 600,000 seats per day on HS2 services, more than doubling the number of seats in and out of Euston during peak hours. Moving long distance services onto the HS2 network will also release capacity on existing rail lines, offering the potential to more than double seats during evening peak hours compared to today’s services from Manchester Piccadilly towards Crewe and Stoke-on-Trent and from Leeds towards Wakefield;

• provide services that will be frequent, providing up to 18 trains per hour in each direction from London, and a further six trains per hour in each direction from Birmingham, to destinations all over the UK;

• significantly cut journey times between our city regions. HS2 will reduce the journey time between the East and the West Midlands from over an hour to 20 minutes and between Birmingham and Manchester city centres from 88 minutes currently to 40 minutes. The HS2 East Midlands Hub will be connected to Sheffield, Leeds and Birmingham city centres in under 30 minutes’ travel time; and

• deliver world class reliability, using the latest technologies on a network that is dedicated to high speed services to deliver punctual services that will change the way that people travel for work and leisure.

HS2 will fundamentally change the way we think about reliability and train travel in Britain. Our ambition is for HS2 to achieve world-class levels of reliability, on a par with Japan’s Shinkansen high speed rail network. HS2 will be a railway that can be depended on seven days a week.

On today’s railways, the West Coast Main Line is operating at a higher level of intensity than many comparable fast main lines in other European countries. This is beginning to have notable consequences for performance and reliability. Evidence suggests that even though the rail industry has got better at responding to individual delay incidents on the West Coast Main Line, the knock-on impact of any given incident is likely to be greater than it was in the past, due to the higher volumes of traffic operating.

Today, only half of all long distance rail services arrive within a minute of their scheduled times at their terminus stations. The example of Virgin Trains illustrates the challenges of achieving punctual services on the West Coast Main Line due to ageing infrastructure and the need to share lines with other passenger and freight operators. For the year ending in March 2018, less than one-fifth of the delays to Virgin Trains services were attributable to Virgin Trains as the operator, with the remaining four-fifths attributable to the infrastructure and to other operators. HS2 will be in full control of its own operations, allowing a new standard in reliability not possible on today’s railways with a target of only 30 seconds average delay to services on the high speed lines.

The comparison of reliability between HS2 and other modes of transport is even starker. Data on road congestion shows an average delay on the strategic roads network of 9 seconds per mile. Applying this nationwide average to the example of the 120 mile road journey between Birmingham and Leeds suggests an average delay of 18 minutes.
The backbone of our future rail network

In the report Rebalancing Britain I called for a more strategic approach to the future of transport in this economy. The aim of this strategy must be a greater understanding of how the railway, transport and infrastructure can help our economy grow. As a strategic investment in our future infrastructure, HS2 can provide the backbone of our future rail network, offering the possibility to reshape the way we run future transport and meet the needs of the economy not just today, but for many decades to come.

It is encouraging to see that thinking has begun on how best to use the capacity that HS2 releases on the conventional rail network to provide new local, commuter and freight services. However, to date this work has tended to focus on incremental changes to service patterns that respond to the capacity directly released by shifting long distance services onto the HS2 network, but which otherwise largely maintain the status quo in the way we use our railways.

Sir David Higgins, Chair, HS2 Ltd

This step change in reliability offered by HS2 will allow passengers to plan their journeys with the confidence that HS2 will deliver them to their destinations on time.

This step change in reliability offered by HS2 will allow passengers to plan their journeys with the confidence that HS2 will deliver them to their destinations on time. This in turn can change the behaviour of travellers. Evidence suggests that people travelling for time-critical activities such as important business meetings, picking up children or to make deliveries build in extra ‘slack-time’\textsuperscript{18}. This might mean planning to arrive excessively early at the final destination or making an overnight stay to guarantee being on time to catch an early flight or attend a morning meeting. These behaviours are costly in terms of lost time and financial costs, both for the individual passenger and for the economy.

Trust in the reliability of HS2 services will also open up new opportunities for interchange between rail and other transport services, as passengers can have confidence that HS2 will allow them to catch their onward connections without the need to build in large buffers to allow for potential delays.

Sir David Higgins, Chair, HS2 Ltd
In designing that strategy, it is important that we remind ourselves of the original concept for HS2 that was set out in my first report as Chairman of HS2 Ltd, HS2 Plus. HS2 must stand the test of time; be the right strategic answer; be integrated with existing and future transport services; maximise the value added to local and national economies; and be a catalyst for change, both nationally and locally. At its core, HS2 should act as the high volume, high speed transport artery that connects our major city regions.

Making a success of HS2 and using it to reshape the wider transport system will require bold thinking and there are inevitably trade-offs that will require decisions. Maximising the opportunity to connect our largest city regions with fast and frequent HS2 services may require designing our transport network around a series of hubs, with onward connections to spread the benefits of access to the high speed backbone across Britain. This in turn requires a transformative approach to planning services on the conventional rail network that goes beyond incremental change.

In the next ‘A closer look’, I have set out some of the principles that I hope can guide this thinking and ensure that decisions over the future use of HS2 and the design of the HS2 service pattern are taken in the context of a holistic strategy for Britain’s transport network. The decision is ultimately one for Government, working together with national, regional and local transport bodies and informed by the views and priorities of local communities and businesses.

**Challenge #4:**

Future proposals for HS2 service patterns should be guided by a clear set of objectives that reflect the vision for Britain’s future transport network.

The Department for Transport is currently preparing to award the West Coast Partnership franchise in 2019. In addition to running services on the West Coast Mainline, the West Coast Partnership will be asked to provide advice to Government on the design of future HS2 services when Phase One opens in 2026. These proposals should be guided by clearly defined objectives for the transformational change that we are seeking to deliver.

A clear understanding of how HS2 will fit within a wider national transport strategy can also guide planning and decisions that relate to sections of the East and West Coast Main Lines where HS2 services will run:

- Future franchise agreements should continue to ensure that sufficient capacity is available on the East and West Coast Main Lines to allow HS2 services to run beyond the high speed lines. This will ensure that destinations including Wigan, Preston, Cumbria, Scotland, York, Darlington and Newcastle enjoy the benefits of being served by HS2 services.
- Investments in upgrades to the conventional rail network should reflect the future operational needs of HS2 services, as well as those of conventional rail services.
A closer look

Integrating HS2 into a future rail strategy

HS2 provides an opportunity to fundamentally reshape our railways. How we integrate HS2 into our future rail strategy is key to realising this opportunity.
In 2013, Network Rail published a study, as part of a wider programme, to consider how the high speed and existing lines might work together as a single network. The study focused on Phase Two of HS2, which runs north from the West Midlands and set out different approaches to its integration. The study concluded there were three broad approaches that could be taken to determine how services could be run on the existing network and HS2:

- A ‘do minimum’ approach that would keep existing services broadly unchanged.
- An incremental approach that would identify services on the conventional rail network that would be replicated by HS2. These services, which would mostly be long distance fast services, could then be withdrawn to release capacity on the conventional network, freeing up space for new services.
- An Integrated Connectivity approach whereby future services on the conventional rail network are planned to complement and work in conjunction with HS2. The Network Rail study described this approach as: “An integrated, holistic approach to the introduction of HS2 ... (which) seeks to plan the services on the existing network to work in conjunction with HS2. The aspiration is that where appropriate, long distance services provided by HS2, with services on existing network set up in a feeder pattern to provide frequent and reliable connectivity between surrounding areas and the HS2 station (hub). This would lead to a step change in how passengers would view using long distance services, and allow additional opportunities to improve cross country services and offering of services to other markets that cannot be currently served due to the capacity constraints on the existing network.”

This transformative approach to planning HS2 as part of a wider strategy for the rail network offers many benefits. It would allow planners to optimise use of the entire network, while providing fairness in access to services by spreading the benefits of HS2 to as many people as possible. The approach would provide the greatest
opportunities for new services and capacity release on existing network. Realising these opportunities would require difficult decisions to be made and would require a shift in the mindset of passengers. This model can only succeed if passengers in some parts of the country are willing to substitute direct rail services to major urban centres in favour of high quality connections into hubs that then provide access to HS2 services for long distance journeys. The network will need to be designed to ensure that interchanging is simple, quick and effortless to make this option attractive to passengers. This principle should guide the design of stations, timetabling, smart ticketing, fares policies and the provision of passenger information.

Despite these challenges, the Network Rail study found broad support for this integrated connectivity approach amongst stakeholders. Reporting on workshops held with 31 council representatives, participants from Passenger Transport Executives and Chambers of Commerce, the study reported that hub-and-spoke style services would be an acceptable alternative to today’s rail services at appropriate locations, recognising the potential opportunities to improve inter-regional, commuter and freight services, as well as encourage a shift from road to rail travel.

Once a clear vision is in place for how HS2 will be integrated into the wider transport network, this vision can shape a clear set of objectives by which a future operator of HS2 should design the HS2 service pattern. These objectives should be informed by the core principles that were established in the early days of the HS2 programme to inform planning and design, which remain relevant to this day20.
• High speed capacity should be used in a way which yields the maximum overall benefit.
• High speed rail services should serve long distance, city-to-city journeys rather than shorter distance trips.
• New high speed lines should only be used by high speed trains on the busiest parts of the network. Adding slower trains reduces capacity.
• The benefits should be extended to cities further north with trains running off the high speed line and onto the conventional network. This has been captured in the design of the HS2 scheme, which will see high speed trains continue on conventional lines to serve destinations such as York, Darlington, Newcastle, Wigan, Warrington, Cumbria and Scotland.
• High speed lines must be well integrated with other transport networks to allow the time savings to be carried through to the whole end-to-end journey. Operationalising these principles into criteria to assess proposals for the design of HS2 services will require the term “maximum overall benefit” to be more clearly defined. The use of cost-benefit analysis to assess the value-for-money of transport schemes is well established in the UK and plays an important role in ensuring that HS2 delivers value to taxpayers. Existing models and methods of cost benefit analysis do not fully capture the potential of HS2 to transform the economic geography of Britain. It is important that proposals brought forward by a future operator of HS2 are also assessed for their contributions to delivering balanced economic growth across our regions and to ensure that they provide access to as many as people as possible to the high speed rail network.
Spreading the benefits of HS2 – the importance of regional and local integration

HS2 will directly serve over 25 stations across Britain. It is important that these stations are well connected into local and regional transport networks to spread the benefits of improved transport connectivity as widely as possible.

The 2014 report HS2 Plus identified that the key to improving poor transport connectivity in the North, particularly on east-west routes, is to integrate HS2 into the existing network to improve connectivity between cities such as Liverpool and Manchester, Manchester and Leeds, Leeds and Hull, as well as Birmingham and Leeds. Four years later, it is satisfying to reflect on the progress that has been made by Transport for the North and Midlands Connect, bringing forward ambitious plans to improve transport connections within the Northern Powerhouse and Midlands Engine regions.
Local authorities and Local Enterprise Partnerships along the HS2 line of route are also beginning to think about how best to connect their wider regions into the HS2 network. Cities that will be served by HS2 services running on conventional lines are also preparing plans to upgrade their stations to act as effective hubs for their wider regions. For example, Preston station already acts a major transport hub for Lancashire, connecting towns and cities including Blackpool, Blackburn and Burnley into regional and national rail services. Preston will only operate effectively as hub, connecting Lancashire into the HS2 network, if Preston station is developed into a 21st century facility through which passengers can interchange in comfortable surroundings.

The Lancashire Enterprise Partnership, working in partnership with Lancashire County Council and Preston City Council, is commissioning a study to identify station improvements.

“Making the most of space released by HS2, and linking to the six Midlands stations serving the new network, is vital to widening the pool of skills for businesses to draw upon.”

Sir John Peace, Chairman, Midlands Connect
The West Yorkshire Combined Authority (WYCA) is actively planning for how best to integrate HS2 into the region’s wider transport strategy and deliver on the potential that HS2 offers for transformational change.
The WYCA and the Leeds City Region Local Enterprise Partnership are currently developing an HS2 Connectivity Strategy. This strategy sets out to support almost 150,000 additional jobs that are forecast to be created across the city region. As a result, the region’s transport network will need to provide for at least 25,000 to 30,000 additional trips into Leeds city centre in the morning peak by 2033, supporting almost 25,000 additional jobs in the centre.

At the heart of the region’s plans is the redevelopment of Leeds station. The Leeds Integrated Station Masterplan establishes a collaborative industry blueprint plan to integrate HS2, Northern Powerhouse Rail, and enhancements to existing rail services within a single station. The masterplan accommodates a doubling of rail passenger numbers over the next 30 years and acts as a catalyst for commercial development and the building of new homes in South Bank Leeds and across the region.

One of the main themes of the HS2 Connectivity Strategy is the development of inclusive growth corridors with ambitions to transform connectivity where the economic need is greatest. Priority corridors include links between Leeds and Bradford, York, Halifax and the Calder Valley, Harrogate, Huddersfield, Wakefield, Skipton and Selby. In developing these corridors, the work will identify the transport modes (cutting across bus, rail and mass transit) that are best suited to creating additional capacity and meeting the needs of local communities. This work will establish the future pipeline of major transformational projects across West Yorkshire.

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A closer look

Greater Manchester

Greater Manchester’s vision is for ‘World class connections that support long-term, sustainable economic growth and access to opportunity for all’. To this end they have developed the Greater Manchester Transport Strategy 2040, with the objective of taking a bolder and longer term view of their future transport needs.
The city region has identified long-term thinking as critical to their success in creating sustainable economic growth and meeting the needs of a growing region to provide opportunities, a high quality of life and a great place to live. The Transport Strategy seeks to capitalise on the transformation in inter-city connectivity offered by both HS2 and Northern Powerhouse Rail. Plans under development aim to establish a fully integrated, high capacity transport system across Greater Manchester, with proposals to create a cleaner, greener, more prosperous city region through better connections and simpler travel.

The role of strategic interchange hubs are a key part of these plans. HS2 stations at Manchester Piccadilly and Wigan have been identified as national hubs that will connect Greater Manchester to other regions of the UK, while HS2 services will also call at Manchester Airport, which acts as the global gateway for the city region. Other key town centres and strategic employment centres in Greater Manchester will be connected to one another and to these global and national hubs through radial and orbital public transport links.
A closer look

East Midlands

The new HS2 East Midlands Hub station at Toton will be amongst the best connected stations on the high speed rail network, connecting to London in 52 minutes, to Birmingham in 20 minutes and to Leeds in 27 minutes.
The East Midlands HS2 Growth Strategy has explored how best to spread the benefits of this improved connectivity to the major population and employment centres in the region, including Nottingham, Derby, Leicester and East Midlands Airport.

East Midlands Councils are working together on the East Midlands Gateways project, in collaboration with Midlands Connect, HS2 Ltd, Highways England and Network Rail. The initial focus of the project is to use a new strategic transport model to assess packages of options involving different transport modes. These options will be assessed according to their contribution to encouraging use of sustainable public transport, relieving congestion on roads to deliver localised benefits for communities around Toton and to delivering economic growth in the region. The region’s HS2 Growth Strategy targets 20 high speed and conventional trains per hour calling at the HS2 hub station in both directions. In addition to extending the Nottingham Express Transit tram network to the HS2 station and providing connections to the University of Nottingham and the Queen’s Medical Centre, the project will look at options to open up connections to the west of the station towards Derby and East Midlands Airport and to develop the network of bus routes to serve surrounding communities.
Using HS2 as a catalyst for balanced growth

“

The biggest danger in any major project is losing sight of why you are doing it in the first place. Connectivity equals jobs. In my view, it is really that simple.”

Sir David Higgins, Chair, HS2 Ltd
Rebalancing Britain

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HS2 will create a step change in the mobility of people, skills and knowledge – helping local places to develop their distinctive strengths
HS2 will not only be the backbone of the UK’s future rail network, it will also form the backbone of the future UK economy, joining together the UK’s future economic powerhouses, regions and largest cities. By creating a step change in the mobility of people, skills and knowledge between cities and areas across Britain, HS2 offers the potential to lessen region-specific barriers to growth. This will help local places to develop the distinctive strengths of their local economies.

Cities are an increasingly important engine of growth in advanced economies. Knowledge-based sectors cluster in urban areas where dense agglomerations of skilled people can share ideas and benefit from access to shared supply chains. HS2 will create a well-connected network that will allow cities to share skills and knowledge between them.

The report *Rebalancing Britain*, published in 2014, made the case for investment in transport to help alleviate the unbalanced nature of the UK economy, with an overheating South and economies in the Midlands and the North that are not achieving their full potential. Four years on, the need to address these regional disparities remains just as pressing. Government’s modern Industrial Strategy, published last November, identified greater disparities in regional productivity in UK than in other European countries, but also recognised that our cities, towns and rural areas have competitive advantages that will be essential to shaping our economic future.

**Designing the eastern leg of HS2 Phase Two to deliver transformational growth**

The eastern leg of Phase Two of HS2 will connect the West and East Midlands, Yorkshire, and the North-East, improving links between Local Enterprise Partnership (LEP) regions that are home to around 11 million people. Connecting some of the UK’s best universities and research centres in the East Midlands, with advanced manufacturers in the West Midlands, Leeds, South Yorkshire and the Tees Valley, will create the potential for greater research collaboration to strengthen the competitiveness of British manufacturing. HS2 will bring the UK’s fastest growing legal sector in Leeds, employing over 8,000 people in law firms ranging from international players to highly specialised niche practices, within 50 minutes’ journey time of Birmingham and within half an hour’s journey time of the East Midlands.

**Challenge #5:**
Maximising the economic potential of the eastern leg of HS2 Phase Two will require decisions on how best to use the agreed route to serve a wider catchment area in South Yorkshire and to strategically connect Scotland, the North West and North East of England into the high speed network.
Phase One will cut journey times to Glasgow. When the HS2 network is completed in 2033, journey times between London and Glasgow / Edinburgh will be reduced to around 3 hours and 40 minutes.”

Sir David Higgins, Chair, HS2 Ltd

In South Yorkshire, the decision to run HS2 services into Sheffield Midland station will improve connectivity for Sheffield city centre without impacting on services to areas of greater demand to the North: Leeds, York and Newcastle. In my report on options to serve South Yorkshire, published in 2016, I called on HS2 Ltd and the Secretary of State to consider the potential for a parkway station on the high speed line, which could serve the South Yorkshire areas as a whole, and to extend HS2 services beyond Sheffield Midland to serve locations such as Barnsley and Rotherham. Work has since been undertaken in this area and ultimately this is a decision for the Secretary of State for Transport. As we move towards submission of the hybrid Bill for Phase 2b into Parliament, a decision will be needed on whether to include provisions for a potential parkway station in the scheme design. Including passive provision for a parkway would allow the infrastructure to be future proofed to meet the future needs of communities and businesses in South Yorkshire.
Scotland will be well served by HS2. Starting in 2026, Phase One will cut journey times to Glasgow. When the HS2 network is completed in 2033, journey times between London and Glasgow / Edinburgh will be reduced to around 3 hours and 40 minutes. Direct HS2 services will cut the journey time from Birmingham to Glasgow and Edinburgh by over an hour compared to today’s fastest services.

Currently, HS2 services to Scotland are expected to run on the western leg of HS2 infrastructure and then onwards using the West Coast Main Line. Alternative options to route services via the eastern leg of HS2 and onwards using the East Coast Main Line could serve York, Darlington and Newcastle and would serve Edinburgh well, although it would deliver a longer journey time to Glasgow. An alternative route to connect Scotland to HS2 services via the East Coast would connect more centres of population and demand and deserves proper consideration.

Demand forecasts show that to serve Edinburgh and Newcastle on the same train would likely require taking 400 metre HS2 trains to Newcastle. Current plans assume that 200 metre trains will serve Newcastle. Transport Scotland has asked Network Rail to undertake initial feasibility work on what would be needed at Newcastle station to accommodate 400 metre trains.

Investment to address existing capacity constraints on the East Coast Main Line would also deliver benefits to cities in the North East of England and could fit with the aspirations of Transport for the North to improve rail services between Leeds and Newcastle.

“\nIt’s vital HS2 is fully integrated into the transport infrastructure of the North. That’s where Northern Powerhouse Rail (NPR) comes in. NPR is being planned in lockstep with HS2, utilising the new infrastructure to offer best value for money and providing regional connections which will maximise the benefits of high speed rail.”

Transport for the North Chairman, John Cridland CBE

Continued on Page 54
A closer look

Connect the regional powerhouses

HS2 will connect the UK’s four economic powerhouses of London and the South East, the Midlands Engine region, Northern Powerhouse region and Scotland.
London accounts for almost a quarter of UK economic output and all of the UK stands to benefit from London’s status as a global city. However, rising costs for housing and businesses mean that the capital risks becoming a victim of its own success. The Midlands Engine and Northern Powerhouse regions together contribute over 30% of UK economic output. The major cities of Glasgow and Edinburgh are the engines of the Scottish economy. HS2 will connect these four economic powerhouses.

However, productivity levels in the regions that make up the Midlands, North of England and Scotland lag behind the national average. Productivity in London was 32% higher than the UK average in 2015. In the regions of the North and Midlands productivity ranged between 10% to 15% below the UK average. The productivity gap between the best and worst performing regions in the UK has increased since the mid 1990s. To raise our national productivity, it is crucial that we enable areas outside the South-East to realise their potential. HS2 has an important part to play.

HS2 will connect London and the South-East, the Midlands Engine, Northern Powerhouse and Scotland with fast, frequent and reliable services. Improved transport connections will allow these economic powerhouses to trade and share knowledge, skills, finance and open up access to market opportunities, creating a stronger, more productive, resilient and balanced economy operating at its full potential.

The regions are investing in their regional transport systems to ensure that the improved access to economic opportunities offered by HS2 are available across the regions of Britain. Plans being developed by Transport for the North and Midlands Connect will link HS2 stations to towns, cities and communities across the North and Midlands.

The result will be that investment in HS2, integrated into a wider transport network, provides opportunities and benefits not only for areas along the HS2 route, but for Britain as a whole.
A closer look

The growing importance of cities

Following a sustained period of post-industrial decline in the latter half of the 20th century, major UK cities have seen a change in their fortunes in recent decades. HS2 will support this global trend in which cities act as engines for growth and prosperity.
Dense clusters of skilled people act as a focal point for knowledge-based sectors such as finance, professional and business services, digital and higher education that thrive on face-to-face contacts for the sharing of ideas, skills and support services. Cities account for 80% of global growth and around 60% of UK economic activity\textsuperscript{31}. The growing economic clout of urban economies has contributed to growing populations. Today, 54% of the world’s population lives in urban areas, a proportion that is expected to increase to 66% by 2050\textsuperscript{32}.

Looking to the future, it is likely that growth will increasingly rely on connections between specialised and diverse cities. Supply chains have been re-organised both globally and in the UK by new technology, leading to the emergence of connected cities\textsuperscript{33}. While at first glance many cities might appear to support similar sectors, this conceals specialisms within sectors that reflect distinctive local strengths and assets. As an example, the North of England is home to thriving clusters in the digital sector, but in different guises, with education technology emerging as a strength in Manchester, while Leeds has developed a leading role in financial technology\textsuperscript{34}.

If Britain’s cities are to continue to grow and compete on the world stage, then they need to compete in the knowledge economy. Large cities enjoy two advantages – their ability to create and spread new ideas and information, and their potential to provide businesses with access to a large pool of highly-skilled people.

Maximising these advantages will require a policy mix that includes planning policies that encourage development of commercial space and investment in transport links\textsuperscript{35}.

HS2 will allow the sharing of ideas and information to take place not just within Britain’s cities, but also between them. For example, HS2 will improve access to the fast-growing finance, professional and business services sector in the West Midlands for firms in Manchester’s digital cluster. Nearly 300 companies in the finance, professional and businesses services sector are headquartered in Birmingham. The sector employs around 100,000 people in the city of Birmingham. HS2 will more than halve rail journey times between Birmingham and Manchester city centres from 88 minutes currently to 40 minutes when the HS2 network is completed in 2033, with two direct and reliable HS2 services every hour in each direction\textsuperscript{36}.
While the size of the economic challenge remains undiminished, it is very encouraging to see that investment in transport infrastructure is increasingly viewed as a means to deliver economic strategies. This is evident in the excellent work being taken forward by Transport for the North and Midlands Connect, working with local partners, to identify strategic economic corridors. These corridors are being used to prioritise investment and deliver transport improvements that connect complementary sectors and assets across our cities and regions. The Department for Transport is making real progress in developing guidance on how to account for wider economic impacts in the appraisal of transport projects.

Midlands Connect and Transport for the North are developing ambitious plans to improve transport in the Midlands and North of England. These plans seek to increase the contribution that the Midlands and the North make to a productive and prosperous nation.

**Midlands Connect** is working with partners to identify the major infrastructure projects needed to improve the region’s connectivity and power the Midlands Engine. Investing in complementary connectivity will spread the growth unlocked by HS2 across the Midlands and the country as a whole. Midlands Connect’s Strategy, published in March 2017 is built on a strong understanding of the changing economic geography of the Midlands. The Strategy identifies how transport connectivity supports economic growth in different sectors and locations across the Midlands – and importantly how and where it acts as a barrier to growth. Investment plans are based on four strategic economic hubs within the Midlands and six intensive growth corridors connecting them to each other and to markets in neighbouring regions. The aim is to better connect nationally important clusters in sectors such as advanced manufacturing, logistics and professional services.

**Transport for the North (TfN),** the first sub-national body with statutory powers, is making the case for pan-Northern strategic transport improvements, which are needed to support transformational economic growth. This partnership of 19 local transport authorities and 11 Local Enterprise Partnerships is developing a more strategic view of transport investments that better connect the economic clusters across the North. The establishment of TfN follows the recommendation in a previous HS2 Chairman’s report *Rebalancing Britain*. TfN research shows that there is considerable economic potential for the North to add almost £100 billion in real terms of economic benefit to the UK economy, and create 850,000 new jobs.

TfN published their Draft Strategic Transport Plan in January 2018. The plan sets out the case for strategic transport infrastructure investment through to 2050, to support transformational economic growth. The plan identifies seven multi-modal Strategic Development Corridors which together represent an economic area with highest potential to achieve transformational growth by bringing forward major, strategic rail and road investment to link economic clusters. As an example, TfN are examining the case for improved transport links to create a corridor of advanced manufacturing stretching from Lancashire to South Yorkshire. In South Yorkshire, the University of Sheffield’s Advanced Manufacturing Research Centre (AMRC) focuses on advanced machining and materials research for aerospace and other high value manufacturing sectors. In Lancashire, the recently announced AMRC will be based at the Aerospace Enterprise Zone at Samlesbury near Preston and will see the Lancashire Local Enterprise Partnership work with its partners and The University of Sheffield to create a centre of excellence in research and development.
TfN’s long-term Investment Programme, alongside the Strategic Transport Plan, will then form key advice to Government on future investment priorities over the short, medium, and long-term.

By improving the quality of transport connections across the Pennines, the emerging plans of TfN will facilitate the face-to-face contact on which research collaboration and the sharing of new ideas thrives. HS2 stations at Preston and in South Yorkshire will enhance these benefits by connecting manufacturers and research centres to world class universities, research centres and advanced manufacturing clusters in the Midlands.

The City Growth Commission recommended that delivering effective infrastructure for truly connected cities will require the UK to develop a strategic investment framework that cuts across the siloes in central and local Government.

Government departments are working together to help local places along the HS2 line of route to design and implement their HS2 Growth Strategies. This support is vital and should bring together those parts of Government responsible for transport, housing, local growth, industrial strategy and skills.

These plans should be informed by evidence on future growth opportunities and the structural weaknesses that are holding back growth. Newcastle provides a case study. Newcastle City Council has identified the need to improve the attractiveness of Newcastle city centre to attract and retain skilled people. Plans are under development to deliver public transport solutions that will ease traffic congestion and enhance the appeal of the city centre as a place to live and work.
A closer look

**Improving quality of life to attract skilled people to Newcastle city centre**

Newcastle and the North-East believe that attracting and retaining a skilled and talented workforce is vital to future economic success, as the region seeks to grow sectors such as digital, professional and business services, advanced manufacturing and health and life sciences.
Making Newcastle a vibrant, liveable and well-connected city that provides a high quality of life and a great place to live and work is a key part of achieving this success. Newcastle performs well at retaining graduates who moved to the city to study at its two universities and is a popular destination for tourists and visitors.

Newcastle sees HS2 and the wider transport network as playing an important role, both in attracting investment and growing the local economy to provide career opportunities, but also by providing connections to other UK cities for leisure.

Newcastle recognises that growing businesses and attracting investment and activity into the city risks creating traffic congestion. Left unchecked, this congestion could undermine the vibrancy and attractiveness of the city centre as a place to live and work. The city is developing an approach to managing congestion that seeks to make the most of integrated mobility options to help people move smoothly into and around the city centre.

This requires improving the high capacity public transport system so that it will be attractive to use and allow passengers to complete their door-to-door journeys with ease. Newcastle are exploring how to better integrate access around Central Station for all users, alongside further investment to improve public space in the city centre and encourage walking and cycling for local journeys.
Confidence

Travelling up and down the country, it is clear that HS2 is already delivering benefits, well in advance of the first HS2 train running in 2026. The key to unlocking those early benefits is the confidence that HS2 inspires in the future of our towns, cities and communities.

HS2 represents a vote confidence by our country, funded by taxpayers across Britain, in the future of the Midlands and the North of England. The scale and ambition of HS2 makes it the largest investment in our transport infrastructure since a group of county surveyors from across the country sat down in 1938 to form the blueprint for the national motorway system we still use today44.

This vote of confidence is starting to change the way that people feel about their local areas, and the way that local areas in the Midlands and North are perceived by others. Walking around Birmingham today, you cannot help but notice the cranes and the construction activity, but just as importantly the renewed sense of confidence and energy in the city.
Confidence in investment, confidence to invest

The scale and duration of HS2 also provides confidence to the public and private sectors to make long-term investments.

The West Midlands is establishing itself as a destination of choice for businesses with an existing UK presence who are seeking to expand:

- HSBC is relocating its UK retail and business banking operations to Birmingham and PwC is significantly expanding its presence in the city.
- Deutsche Bank now manages over 600 clients from Birmingham who were previously managed in London45.
- Lombard Risk Management plc announced in 2016 the opening of a new Technology Centre in Birmingham and the creation of up to 140 new jobs over the next three years, as it expands in the UK. The Birmingham office will allow developers based in Birmingham to work closely with key businesses in London46.
- US law firm Hogan Lovells chose Birmingham for its new UK legal centre47.

Research suggests that the main drivers of the location decisions of graduates are the availability of graduate level jobs and future career prospects, as well as quality of life and living costs48. As companies operating in highly skilled sectors expand their presence in the West Midlands, this will improve long-term career prospects for people in the region. Currently, Birmingham’s higher education sector attracts large numbers of students, of whom around half stay in the city after graduation49. Improved career prospects could help Birmingham to increase its graduation retention rate.

Business Professional Services (BPS) Birmingham brings together member organisations in the sector to identify future skills needs and provide networking opportunities for young people to meet and share their career experiences50.

Construction of HS2 has begun and will continue until the opening of Phase Two of HS2 in 2033. Alongside other major infrastructure programmes, this multi-decade construction programme provides greater certainty to the construction and rail sectors about the future pipeline of work. This allows our supply chain to invest in skills, not just of today’s workforce and apprentices, but of today’s schoolchildren and students who will have the opportunity to work on HS2 during their future careers. It also allows the construction and rail sectors to invest in new and innovative technologies and ways of working. This opportunity to think more radically about how we deliver Britain’s new high speed railway offers benefits to the taxpayer. It also offers long-term legacy benefits in increasing the productivity and global competitiveness of our supply chains, and upskilling the people they employ.
A closer look

PwC is investing with confidence in the future of Birmingham

“The world class connectivity HS2 brings will support the role of Midlands flagship investment at PwC Birmingham as a destination for technology driven client services, and will be a catalyst to the creation of national and international centres of excellence for a range of key industries.”

Matthew Hammond, Midlands Region Chairman PwC
PwC is significantly expanding its presence in Birmingham. One Chamberlain Square, the first building which will be completed on the £700 million Paradise development in Birmingham city centre, will be solely occupied by PwC. As well as relocating 1,400 staff already based in the city, the new premises will accommodate 1,000 extra people to support PwC’s expansion in the Midlands. The announcement represented the single biggest investment outside of London for the firm, a strategic shift encouraging growth in the regions, reflecting 60% of the firm’s graduate intake from 2018 to be recruited into roles outside of the capital and the increased use of technology to deliver services.

PwC’s choice of Birmingham reflected the city’s location at the heart of the UK and the strong growth prospects of the Midlands, the pipeline of talent from Midlands schools and universities, coupled with a diverse population. The firm is investing to create a tech-enabled working environment. PwC is increasing its graduate and higher apprentice recruitment in the Midlands from around 200 roles per annum until 2016/17 to around 300 roles from 2018-21.

The city centre location was chosen to appeal to the firm’s young workforce, reflecting a trend towards city centre living and working. Proximity to the existing New Street and Snow Hill stations, the future HS2 terminus at Birmingham Curzon Street and the expanding metro links in the city all provide easy access for visiting clients and colleagues from other offices. This excellent connectivity, which includes the appeal of Birmingham Airport and the prospect of HS2 connections to Heathrow, will support the role of the Birmingham PwC office as a meeting hub for PwC’s national operations and as an international centre of excellence for industries, manufacturing and transport.
Delivering on the potential for HS2

Thinking broadly beyond master planning around stations to show how HS2 can help local places meet their future ambitions.
Local visions and ambitions for HS2

“For HS2 to be a genuine success, its benefits must be felt across the region. West Midlands Combined Authority is undertaking a once-in-a-generation transformation of transport infrastructure, improving connectivity to HS2, making it a truly transformational scheme.”

Andy Street, Mayor of the West Midlands

The benefits that HS2 can bring are multi-layered and extend beyond the station master plan areas.

Each of our regions and local places are different. They have their own strengths, weaknesses, hopes, challenges, and ambitions for the future. It is unsurprising therefore that there are a wide range of ways in which they hope to see HS2 helping them realise their ambitions. To cite just a few examples:

• Local places will have different strategies for how to grow their economies and create high quality job opportunities for local people. Better transport connectivity will allow local places to concentrate on developing their specialisms and strengths – whether agri-tech in York, life sciences and pharmaceuticals in Cheshire, low carbon energy in Liverpool, the nuclear and energy industry along Cumbria’s coast, aerospace in Lancashire or software design in the North East. HS2 will also help local places in the Midlands and the North to attract tourists and business visitors by providing fast, frequent and reliable access to airports.

• Our cities and regions face different challenges in attracting and retaining skilled workers. The Local Enterprise Partnership (LEP) regions of Cheshire and Warrington and York, North Yorkshire and East Riding have levels of high skills (degree equivalent or higher) comparable to the UK average. The city regions of Birmingham, Manchester, Leeds and Sheffield are home to high quality universities, yet much less of the working age population have degree level qualifications (less than 35%) compared with London (around 50%).

• Areas with strengths in construction and rail will seek to maximise the opportunities for local businesses to join the HS2 supply chain and to enhance the capabilities and expertise of their sectors. Those areas that will host HS2 depots have additional opportunities to create skilled jobs and deliver investment and innovation.
The University of Leeds has recently formed the Institute for High Speed Railways, as an innovation hub for the Leeds City Region. This will include using the Institute as the catalyst for the planned Leeds Advanced Manufacturing Park, which aims to spark technology clustering and advanced manufacturing next to an HS2 rolling stock depot.

Local ambitions for reaping the benefits of HS2 may extend beyond benefits for the economy, jobs and skills to include social and environmental benefits. HS2 will improve connections between communities for visiting friends and families, and widen access to education opportunities, sporting and cultural events, helping to improve the liveability of our towns and cities. Our vision is for HS2 to create a new ‘green corridor’ which will connect wildlife habitats through the spine of the country with a network of green spaces – woodland, wetland, ponds, hedgerows, heathland, meadow and farmland. Up to 7 million trees and shrubs will be planted as part of our landscape and habitat creation programme.

HS2 also has the potential to act as catalyst for building new homes that are linked by public transport to job opportunities and social amenities. The Constellation Partnership area, covering areas in Cheshire and the north of Staffordshire, will be served by HS2 services at Crewe, Stoke-on-Trent and Stafford stations. The Partnership has developed a Growth Strategy to capitalise on the transformative growth potential of HS2 in the area and create 120,000 new jobs by 2040. The area around Crewe station has the capacity for 3,750 new homes and over 20,000 new jobs. In addition, there is capacity to deliver 110,000 square metres of new residential and commercial floor space, creating 1,600 jobs, in the vicinity of Stoke-on-Trent station and 70,000 square metres of office space, 800 new homes and upwards of 6,500 jobs immediately adjacent to Stafford station. The new HS2 station at Old Oak Common will be at the centre of an opportunity area with around 25,000 new homes. The HS2 Birmingham Interchange station, will sit at the heart of the new ‘UK Central Hub’, with 3,000 to 4,000 new homes and in Leeds, HS2 will act as catalyst for development of the South Bank with the potential for 4,000 homes.

Success will require local places to think about how HS2 can best support their distinctive strengths and ambitions, as part of a well-connected network of city regions. Development of new property and regeneration in the areas surrounding HS2 stations can make an important contribution, establishing a clear sense of place and providing high quality residential and commercial space to attract skilled people and businesses. However, the geographic boundaries of station masterplan areas must not mark the limit of local ambitions for capitalising on HS2. Local places should be supported by Central Government to bring forward plans that are bold, ambitious and grounded in a locally led vision for the benefits that HS2 can bring.
The importance of planning and acting early

Birmingham City Council and the West Midlands Combined Authority have acted early to create the conditions for a renewed sense of optimism and the investment it is attracting to the West Midlands region. In 2011, when the HS2 programme was in the early stages of its development, Birmingham City Council published the Birmingham Big City Plan. The Plan aimed to create a world-class city centre by planning for 20 years of transformation, with a strategy to grow the city centre by 25% and provide 700,000 square metres of additional office space.

The £724m of investment in the Curzon area and the £137m extension of the Midland Metro is expected to deliver over 600,000 sq m of commercial space, 4,000 homes, 36,000 jobs and over £1.7bn of private sector investment.
Challenge #6:
Early action will maximise the benefits that Phase Two of HS2 delivers to local areas in the Midlands and the North.

Two years before the Bill to secure powers to build Phase One of HS2 was deposited in Parliament, the Birmingham Big City Plan identified the need to link the proposed HS2 station at Birmingham Curzon Street to the city core and to Birmingham New Street station and to capitalise on the benefits presented by the regeneration of the Eastside area of the city.

Having the Big City Plan in place allowed Birmingham to move quickly to grasp the opportunities that high speed rail offers to the city and the West Midlands region. The launch of the Curzon Masterplan in February 2014 set the aspiration for growth around the HS2 terminus station in the city centre. The subsequent publication of the Midlands HS2 Growth Strategy in April 2015 established how the region will maximise the benefits of HS2, attract significant private sector investment to the region and deliver local infrastructure.

The transformation areas identified in the Big City Plan were used to secure Enterprise Zone status for Birmingham City Centre in 2011. This allowed Birmingham City Council to retain income from business rates in the Zone, which was used to fund vital infrastructure improvements. The West Midlands Devolution Deal, announced in December 2015, secured a major extension of the City Centre Enterprise Zone to take in the area around the new HS2 station at Birmingham Curzon Street and extend in its duration from 2038 to 2046. This allows the City Council to fund a £724 million investment programme for the Curzon area, working in collaboration with the Greater Birmingham and Solihull Local Enterprise Partnership. In addition there was the commitment to funding the £137m extension of the Midland Metro tram to the new HS2 station and neighbouring Digbeth. Overall, this package of investment is expected to deliver over 600,000 square metres of commercial space, 4,000 homes, 36,000 jobs and over £1.7bn of private sector investment.

The formation of the West Midlands Combined Authority has allowed the West Midlands to coordinate their vision and plans for maximising the benefits of HS2 across local authority boundaries. The Combined Authority’s long-term transport plan, Movement for Growth, will put in place the road, rail and tram links needed to connect and feed into the two HS2 stations in Birmingham City Centre and in Solihull. This plan includes a vision to increase the number of people that are within 45 minutes travel time by public transport to a minimum of three main centres and the region’s two HS2 stations.

Chesterfield provides another example of the benefits of taking early action to maximise the benefits of HS2. Chesterfield has been the chosen location for a HS2 infrastructure maintenance depot at Staveley for some time, with the potential to create over 200 skilled jobs. The prospect of HS2 services calling at Chesterfield station was raised for the first time in the summer of 2016. In less than two years, Chesterfield Borough Council, Derbyshire County Council and local partners have developed plans for Chesterfield station to act as gateway for visitors to surrounding attractions including the Peak District National Park, using HS2 as an opportunity to strengthen the offer for international tourists who tend to base themselves in London. The Council is now taking forward a business case for investment to better integrate the station into the surrounding town and improve pedestrian access. With the depot and station, ambitions are set for HS2 unlocking and accelerating over 4,500 new homes and 10,000 jobs.
The role of delivery bodies

Translating bold and ambitious plans into reality will require focus, drive and resources dedicated to delivery. From defining a vision and working up plans, through securing planning permissions, sourcing finance and coordinating the interests of multiple stakeholders, the task of using HS2 to successfully deliver development and regeneration can appear daunting. The challenge can appear harder still where development plans cut across administrative boundaries and involve the interests of large numbers of landowners.
Challenge #7:
Consideration should be given to the role that dedicated delivery bodies, designed to suit their local circumstances, can play in helping to realise the regeneration potential of HS2.

Experience from international high speed rail projects and from the UK’s HS1 show the important role that dedicated delivery bodies can play in overcoming these challenges. Equally, there are examples of how a failure to properly plan and coordinate development activities can lead to missed opportunities, which can prove difficult to reverse later. These lessons are being learned by places on the line of route for Phase One of HS2. At Old Oak Common and UK Central Hub at Solihull, dedicated delivery bodies have set out bold and ambitious plans for investment and regeneration and are already beginning to deliver early benefits.

There can be no one-size-fits-all approach to establishing delivery bodies. The case for a dedicated body, its governance and the powers it is given must reflect local circumstances and the specific local challenges that must be overcome.

At Old Oak Common and UK Central Hub at Solihull, dedicated delivery bodies have set out bold and ambitious plans for investment and regeneration and are already beginning to deliver early benefits.”

Sir David Higgins, Chair, HS2 Ltd
A closer look

The role of delivery bodies to realise the development potential of high speed rail

At Kings Cross, St Pancras station was chosen as the London terminus for the HS1 link. In 2001 a development agreement was signed that established a 50:50 joint venture between Argent, as the developer, and the landowners to develop the former railway lands around Kings Cross.
Argent used a programme of public consultation to develop planning applications that achieved permissions in 2006. To date, £3bn has been invested in construction on the site since 2008, delivering 3 million square feet of commercial office space, with a 97% occupancy rate and hosting 8,500 employees. 900 new homes provide accommodation for 1,200 residents57.

Ebbsfleet International Station provides an example of how opportunities for development can be missed if not planned and delivered in a coordinated way and guided by a clear vision. Ebbsfleet is on the HS1 line, 18 minutes' journey time from London St Pancras and was identified as the location for a major mixed use development. However, the land remains undeveloped, with the station serving as a park-and ride facility. Kent Thameside was set up as a regeneration company. However, a review of the Thames Gateway programme identified lack of clarity over strategy, objectives and goals, poor understanding of market forces and economic geography, an over-centralised and confused approach to governance and accountability and a lack of consistent political and bureaucratic support58.

Government has established Ebbsfleet Development Corporation to accelerate delivery of up to 15,000 homes and create a 21st century garden city in north Kent59.

Examples of limited local impact for out-of-town stations on the French TGV network include TGV Haute Picardie, located between Amiens and St Quentin; Gare du Creusot, 5km away from the closest town; and TGV Lorraine, located midway between Metz and Nancy. However Limburg and Montabaur on Germany's high speed ICE rail network have experienced some success in attracting development and regeneration. These examples highlight the importance of providing good connectivity and access to the station if a station's potential is to be realised60.

Station places along the HS2 Phase One route are drawing on these lessons and experiences to drive forward delivery of ambitious plans for growth.

At the UK Central Hub, which includes the HS2 Birmingham Interchange station, Solihull Council has created the Urban Growth Company (UGC) to lead and co-ordinate delivery of development within the Hub and to realise the full economic potential of the area61. The UGC is a special purpose vehicle, wholly owned by Solihull Council and supported by the West Midlands Combined Authority. The UGC is able to hire staff from a variety of professional backgrounds to oversee ambitious development plans. It plays an important role in bringing together landowners such as Jaguar Land Rover, Birmingham Airport, the National Exhibition Centre (NEC) and Arden Cross to coordinate their individual growth plans and forge agreement on investment in shared infrastructure such as road and public transport access, car parking and utilities. As an example of early success, the UGC has coordinated the interests of multiple landowners and led an 18-month feasibility study into transforming

Old Oak Common in west London, in the Old Oak and Park Royal area, sits across three London borough boundaries: Brent, Ealing and Hammersmith & Fulham. To support the delivery across these London boroughs, it was felt to be important to have a single robust plan, with clear direction and governance62. This resulted in the Old Oak and Park Royal Development Corporation (OPDC) being established in 2015 as a Mayoral Development Corporation (the second of its kind in London) to drive a comprehensive, cross-borough approach, to create a thriving new area delivering around 25,000 new homes and 65,000 new jobs for Londoners. OPDC is a functional body of the Greater London Authority and governed by an independent board. OPDC is the local planning authority and is responsible for preparing and maintaining a Local Plan to guide decisions on planning applications. OPDC also provides guidance to developers and sets the Community Infrastructure Levy.
Closing thoughts
HS2 is, of course, a railway and, as such, our first responsibility is to ensure that we deliver a reliable, fast and accessible means for people to get more easily around the country. And that, in turn, will ease pressure on the existing network both for passenger services and freight.

But HS2 is also more than a railway. It is also a catalyst for change, a way of easing the pressure on London, whilst making the Midlands and the North more productive by that process of improving connectivity: making it easier for companies outside London to access the skills, talent, finance, knowledge and markets they need to succeed whilst also making it easier for people to live and work where they want to and where they feel they belong.

That is the aspiration HS2 wants to achieve. This report has set out how Central Government, local authorities and local and regional transport bodies, working with our supply chain and local businesses, are beginning to turn that aspiration into reality. It is a celebration of how far we have come, and the strength of the legacy we are creating by working closely with our partners across Britain.

But while progress has been impressive, success will require years of focus, drive and commitment. As a project, so far, we have enjoyed a genuinely bi-partisan support base which has allowed us to work at a national and local level to realise the full potential of the corridors we are creating along the length and breadth of the country. Going forward I hope we can maintain that consensus.

I also hope that this will be a project which will continue to evolve to realise its full potential at a both a national and local level and, as it does, that Britain will be proud of HS2 and the transformation it has brought about in the country.

“Britain will be proud of HS2 and the transformation it has brought about in the country.”

Sir David Higgins, Chair, HS2 Ltd
To maximise potential, a railway for every one we need to work together to deliver transformational change.
tial, HS2 must be one. Collectively, gether to deliver hange.
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