

Resolving the challenge of the railways

We have a long and distinguished record in providing advice to the rail industry on planning, franchises and investments. With operations and business planning, and our excellent understanding of demand forecasting, we offer an holistic solution.

The issues

Amid concerns about delivering an affordable railway, the industry faces having to attract more passengers to a system already operating at capacity. Industry and government acknowledge the need to attract more passengers to rail, but one of the biggest challenges is how to achieve this within financial constraints. The cost of capacity enhancements is high. More must be squeezed out of what already exists; innovative ways must be found to provide incremental increases in capacity.



Our experience

We provide market insights to forecast demand, maximise revenue and scheme benefits, and attract external finance. We help operators, rail freight customers and transport authorities optimise the performance of existing rail systems and plan future provision and services. We improve efficiency by applying our business planning capability to franchise and business case development and evaluation; and we assist in the realisation of the business opportunity through our change management expertise.

Regional Planning Assessment for North East

Regional Planning Assessments (RPA) set the framework for long-term planning of rail services in the context of regional and national priorities. The North East region is a major originator of rail freight and the future of this traffic is heavily dependent on the traditional industries (e.g. coal mining, steel and chemicals) that generated it; newer industries coming to the region are less attracted to rail. A key issue was to determine the possible long-term pattern of rail freight to ensure that it was catered for appropriately. The passenger train service in the region consists of a contrast between long distance services to London, Midlands, Yorkshire and Scotland that have a strong market position, and lightly used rural routes. Our output included core and enhanced scenarios for the rail network, covering both services and infrastructure to the year 2025.

South West Rail Corridor Plan

Transport for London appointed us to develop a Rail Corridor Plan (RCP) for the South West of London. Addressing the crucial issue of severe and increasing overcrowding on peak trains, we identified a range of options for longer trains and increased frequency for input to Network Rail's Route Utilisation Strategy and the Department for Transport's franchise specification. Each option was evaluated in terms of operational feasibility, necessary infrastructure works and the impact on crowding and revenue. We then prepared Business Cases for the feasible options, taking into account the opportunity provided by Waterloo International terminal and the potential impact of Airtrack. Our suggested solutions included those achievable in the short term at modest cost, and longer term, more expensive schemes providing further capacity. Subsequently we were appointed to undertake the RCP for the Great Northern/Thameslink route.

GNER East Coast Main Line Franchise

When the SRA announced that GNER had won the new seven-year franchise to operate InterCity East Coast Main Line services, in terms of a pure railway concession, it was the biggest financial transaction in European railway history. We supported GNER throughout the bidding process: helping analyse the core business case, carrying out market research into on-train product design, undertaking demand forecasting and assessing the effect of a new revenue management system. We are now helping GNER turn their winning vision into reality by evaluating alternative locations for a Parkway station and monitoring on-going customer satisfaction.

National Railcard

Following a high-level study suggesting that a National Railcard might generate revenue for the industry and government, the SRA commissioned us to assess its viability in more detail. The aim was that the railcard would be available to passengers of all ages as part of an overall fares policy review. The study provided forecasts of sales, revenue, the effect on all rail travel and the number of new trips generated, including any crowding effects. We assessed the effects on passengers and train operators, enabling the scenario testing of various strategies to help the SRA and DfT to formulate policy.

