

January 2019



EASTERN SECTION

prospectus for growth



Suffolk Coastal & Waveney District Councils



in partnership

eastsuffolk.gov.uk



CAMBRIDGESHIRE & PETERBOROUGH
COMBINED AUTHORITY



NEWANGLIA

Local Enterprise Partnership
for Norfolk and Suffolk



**South
Cambridgeshire**
District Council



IPSWICH
BOROUGH COUNCIL



**Cambridgeshire
County Council**



NORWICH
City Council

Forest Heath & St Edmundsbury councils

West Suffolk
working together

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Front row, from left to right: Sara Noonan (West Suffolk councils), Patrick O'Sullivan (East West Rail Consortium), Cllr Alexander Nicoll (Chair of East West Rail Eastern Section Group, Suffolk County Council), Cllr Philip Smart (Vice Chair of East West Rail Eastern Section Group, Ipswich Borough Council), Kerry Allen (Suffolk County Council), Cllr Andy Smith (East Suffolk Council)

Back Row, from left to right: Chris Poultney (Cambridgeshire County Council), David Cumming (Norfolk County Council), Stuart Morris (Cambridge City and South Cambridgeshire District Council), Tony Jones (Norwich City Council), Carolyn Barnes (East Suffolk Council)



The East West Rail Corridor

Foreword

The East West Rail link is a strategically important rail route connecting Norfolk and Suffolk (the Eastern Section) with Cambridge and Bedford (the Central Section) and beyond to Oxford and the South West (the Western Section). The Eastern Section is an integral part of the overall strategic East West Rail (EWR) project and presents an opportunity to unlock major benefits for the entire EWR network and beyond.

Local authorities in Norfolk, Suffolk and Cambridgeshire are working with the East West Rail Consortium to make the case for a strategic rail connection between Cambridge and Oxford. Now that development of the Central and Western sections are progressing, the local authorities have come together to form the East West Rail Eastern Section Group. Together, with the Local Enterprise Partnerships, local transport bodies and other stakeholders, the Eastern Section Group will seek to improve the rail link between Norwich, Ipswich and Cambridge to better serve passengers and the Port of Felixstowe. This rail prospectus sets out our vision for the Eastern Section and demonstrates the significant opportunities that can be realised by enhancing passenger and freight rail services between Norfolk, Suffolk, Cambridge and beyond.

Passenger and freight rail services already operate on the Eastern Section (passenger services operate between Cambridge and Ipswich and Cambridge and Norwich; freight services operate between Chippenham Junction and Ipswich, as well as through Ely). However, there is significant scope and demand for more frequent services and better rail connectivity. Despite significant growth from the advent of hourly services in the last 20 years on both the Ipswich to Cambridge and on Norwich and Cambridge routes, additional growth is constrained by train capacity and infrastructure limitations. New trains on Greater Anglia services will provide some additional capacity, but to realise the full potential of the lines requires increased frequency which is dependent on infrastructure upgrades and additional trains (as well as the associated funding to deliver both of those outcomes). East-West rail travel is restricted to shorter distance journeys over the existing rail links, as longer-distance trips experience high journey times. Passengers who wish to make longer trips west of Cambridge are often required to travel on crowded routes via London involving multiple changes or have no option but to travel by car on congested road networks.

We therefore see rail improvements to the Eastern Section, and its rail link west of Cambridge and beyond, as an early win to unlock and drive growth. **The Eastern region is a net contributor to the national economy (contributing £35bn GVA to the UK economy*), and its economy is strong, growing by 9% over 8 years since 2010.** The Eastern region would like to deliver more, but realising our full potential is being hampered by infrastructure constraints, notably transport.

Norfolk, Suffolk and Cambridgeshire will be experiencing significant housing, population and economic growth over the next few years. Critical to this growth is the linking of new housing and the counties' key industries and high technology clusters. Bringing together the potential workforce with the employment opportunities in our high value industries will support the economies of a 'golden triangle' (the neighbouring economies of Norfolk, Suffolk and Cambridge). The enhanced link will create new business and investment opportunities reaching out to Milton Keynes, Bedford and Oxford. An effective East West rail link suitable for passenger and freight services right through to Ipswich will also create significant opportunities to increase our national and international economic potential. This potential will be further strengthened by enhancing rail freight services from Felixstowe (one of three of the UK deep water ports), and neighbouring ports. It will also provide another direct freight route to the rest of the UK, reducing demand on the already congested A14, A11, Great Eastern Main Line and London rail network. In addition to this, improved rail connectivity can enable the Eastern region to foster better economic links with the Midlands, the North and Scotland.

Our growth ambitions mirror those set out in the National Infrastructure Commission (NIC) report** which makes the strong case for rail infrastructure (including links to Norfolk and Suffolk) to support growth in the East West corridor. An East West rail link could therefore realise a transformational level of growth within its major economic centres - **tripling economic output by 2050.**



Councillor Alexander Nicoll
Chair of East West Rail Eastern Section Rail Group

*New Anglia Local Enterprise Partnership Economic Strategy <https://newanglia.co.uk/our-economic-strategy/>

**National Infrastructure Commission: Partnering for Prosperity: a new deal for the Cambridge - Milton Keynes - Oxford Arc (November 2017)

Norwich Market



University of Suffolk, Ipswich



Bury St Edmunds Abbey



King's College, Cambridge

Our objectives

The establishment of the East West Rail Eastern Section Group (EWRESG) was endorsed by the East West Rail Consortium. The Group consists of Norfolk, Suffolk and Cambridgeshire County Councils along with West Suffolk Councils, Babergh and Mid Suffolk District Councils, Ipswich Borough Council, East Suffolk Council, Norwich City Council, South Cambridgeshire District Council and New Anglia Local Enterprise Partnership.

The EWRESG will work together to ensure that the Eastern Section is 'Central Section ready' (the link between Cambridgeshire and Bedford). The enhanced operation of services between Ipswich and Cambridge and Norwich and Cambridge will be crucial to the successful operation of Central Section services west of Cambridge. It will also be crucial for the strategic economic link between East and West.

Together, we are working to:

- Improve East West public transport connectivity.
- Provide faster, more frequent and more reliable rail links from the west to Cambridge, Norwich, Ipswich and beyond.
- Reduce journey times and increase reliability of intra-regional and local journeys.
- Increase capacity for inter-regional journeys.
- Enhance capacity for rail freight, especially from Felixstowe.
- Reduce car dependency and carbon emissions from car and road haulage use.

Our offer

The combined economy of Norfolk and Suffolk is a £35bn GVA economy, which has grown by 9%* since 2010. The two counties have over 82% of their working population in employment, which is higher than the national average.

In Cambridge, GVA per head grew by 21% over a five-year period, with jobs expected to grow by 11.6% over the next 10 years. Within the Cambridgeshire and Peterborough Combined Authority area, GVA is expected to increase from £22bn to over £40bn during the next 25 years.

Improving the Eastern Section will help unlock benefits for the UK. This will be achieved by:

Getting the most value out of East West Rail: The Eastern region is one of three UK regions that generates more in taxes than it receives in public money. Investment in rail infrastructure, improving the rail link between key economic growth locations, can realise the growth ambitions set out in the Norfolk and Suffolk Economic Strategy. It will also support key sectors identified in our Local Industrial Strategy: ICT, agri-food and clean energy. Without Eastern Section improvements, rail journey times and frequencies from east of Cambridge to west of Cambridge and vice versa will remain poor, causing people to continue to travel by car to Cambridge and beyond. Improved rail services would also encourage a modal shift from the car onto rail for short and long-distance commuter journeys thereby reducing city centre congestion and allowing housing and economies in key growth locations to grow more sustainably.

GVA (£Bn) by local authority 2008 to 2045*

NORFOLK	£16.7bn	£30.3bn	81% ▲
SUFFOLK	£15.9bn	£29.6bn	86% ▲
GREATER CAMBRIDGE	£10.1bn	£17.9bn	78% ▲
NORWICH	£3.4bn	£6.2bn	82% ▲
IPSWICH	£3.2bn	£6.1bn	90% ▲

*Predicted Growth figures taken from East of England Forecasting Model



Newmarket Racecourse

Connecting areas of key growth: GVA in Norfolk, Suffolk and Cambridgeshire is growing significantly. Investment in rail will accelerate growth and enable the three counties to achieve a higher potential. Norfolk and Suffolk have the potential to grow the economy by **£17.5bn GVA growth by 2036***. Ipswich has been identified as being one of the fastest growing city economies, with Cambridge topping the leader board. Whereas Norwich has joined with Cambridge, Milton Keynes, Oxford and Swindon to form the Fast Growth Cities group – a group established to overcome shared challenges and drive opportunities for developing high-knowledge, high-growth economies.

A study on the Eastern Section was commissioned by the East West Rail Consortium to understand the economic value of improving rail links to key areas of growth in the Eastern, Central and Western Sections. The study identified a range of high value rail links, which included connectivity between Ipswich and Cambridge and Norwich and Cambridge, and the rail service improvements required to unlock them. Assessment of shorter distance journeys (30 – 60 minutes) shows that Cambridge, Norwich, Newmarket, Bury St Edmunds, Ipswich, and Felixstowe are key locations for population, employment and GVA growth. Medium distance journeys (60 – 90 minutes) show that rail travel between Reading, Oxford, Milton Keynes, Cambridge, Ipswich and Norwich provide high-value links.

**HIGH VALUE RAIL LINKS:
KEY JOURNEY PAIRINGS**

Source:
Atkins Eastern Section Study

**SHORT DISTANCE
(30 TO 60 MINUTES)**

- NORWICH - CAMBRIDGE
- IPSWICH - CAMBRIDGE
- BURY ST EDMUNDS - CAMBRIDGE
- NEWMARKET - CAMBRIDGE
- FELIXSTOWE - CAMBRIDGE

MEDIUM DISTANCE (60 TO 90 MINUTES)

- READING - OXFORD - AYLESBURY - MILTON KEYNES - CAMBRIDGE - NORWICH
- READING - OXFORD - AYLESBURY - MILTON KEYNES - CAMBRIDGE - IPSWICH

LONG DISTANCE (OVER 90 MINUTES)

- READING - OXFORD - AYLESBURY - MILTON KEYNES - BEDFORD - PORTS IN EAST SUFFOLK

* New Anglia Local Enterprise Partnership Economic Strategy <https://newanglia.co.uk/our-economy-strategy/>



Norwich Research Park
image courtesy of Norwich Research Park



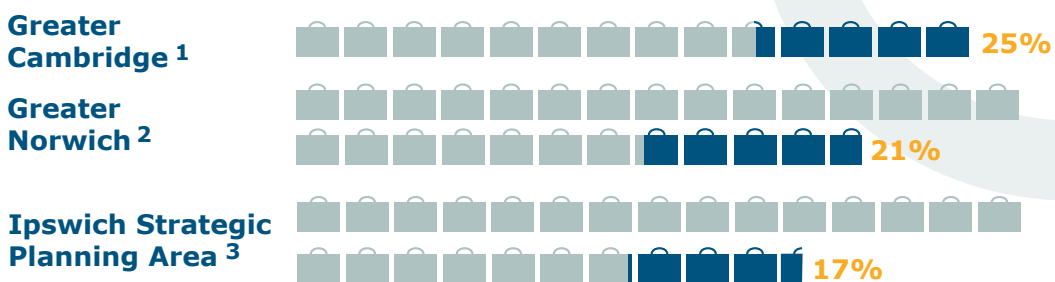
Supporting and unlocking job growth: By 2036 Norfolk and Suffolk are predicted to see the start-up of **30,000 new businesses***. Cambridgeshire and Peterborough also have strong and growing economies, combined they will provide over 90,000 jobs by 2036. A recently commissioned report also shows that the Cambridge life science sector could contribute an additional £1bn per annum** to the economy and an additional 6,000 jobs by 2032 if it could grow unimpeded.

* New Anglia Local Enterprise Partnership Economic Strategy <https://newanglia.co.uk/our-economy-strategy/>

**Cambridge: driving growth in life sciences. Exploring the value of knowledge-clusters on the UK economy and life sciences sector (MedImmune, AstraZeneca)

JOBS GROWTH

- 1 Greater Cambridge (contains administrative areas of Cambridge City and South Cambridgeshire)
- 2 Greater Norwich (contains the administrative areas of Broadland, Norwich and South Norfolk)
- 3 Ipswich Strategic Planning Area (contains administrative areas of Ipswich, Suffolk Coastal, Babergh and Mid Suffolk)



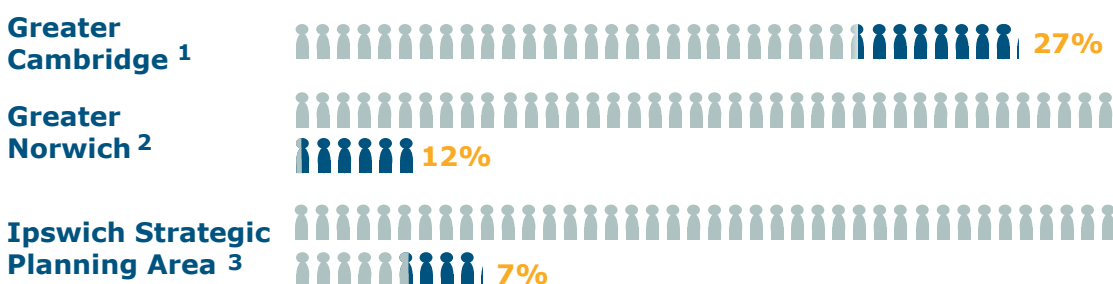
NET INCREASE IN JOBS

44,000*
(2011 to 2031)

45,000**
(2015 to 2036)

37,070***
(2016 to 2036)

POPULATION GROWTH TO 2031



TOTAL POPULATION

351,100

453,100

491,000

*Source: Cambridge City Local Plan (2018) and South Cambridgeshire Local Plan (2018)

**Source: The Greater Norwich Local Plan Consultation

***Source: Lichfields, 2017, Ipswich Economic Area Sector Needs Assessment



Bridge of Sighs, Cambridge

Provision for housing growth: Norfolk and Suffolk will provide **140,000 new homes** over 16 years*, most of which will be located close to railway stations or be sustainably linked to a railway station. Much of the housing growth will be located along the A14 in Suffolk and the A11 in Norfolk, as well as alongside the existing Eastern Section railway line. Cambridgeshire and Peterborough will also be delivering 100,000 homes by 2036.**

* New Anglia Local Enterprise Partnership Economic Strategy <https://newanglia.co.uk/our-economy-strategy/>
 ** Cambridgeshire and Peterborough Strategic Spatial Framework

HOUSING GROWTH

Greater Cambridge



33,500 by 2031
Greater Cambridge Housing Strategy

Greater Norwich



43,000 by 2036
Greater Norwich Local Plan

Ipswich Strategic Planning Area



37,000 by 2036
Ipswich Local Plan Review

Freight Growth: Suffolk and Norfolk play key roles in the global economy. East Suffolk is the home of The Port of Felixstowe, the UK's largest container port. It provides a vital service and accounts for 40% of all containers coming into the UK. The port deals with 'mega vessels' and has increased its cargo capacity by 18% over a five-year period. In 2017, the Port of Felixstowe handled 4 million Twenty-foot Equivalent Units (TEU). Felixstowe sits alongside the ports of Great Yarmouth, Kings Lynn, Lowestoft and Ipswich, all of which have particular specialisms including servicing the off-shore wind industry. The port and logistics sector includes key employers, employing 47,364 people and providing **£2.4bn in GVA*****.

Rail takes 29% of all container units from the Port of Felixstowe (removing 750,000 lorries annually from the highway) and by 2030 is expected to grow from the current 33 to 47 freight trains per day.

***Port of Felixstowe

Port of Felixstowe



Norwich Research Park
image courtesy of Norwich Research Park



Norwich Forum

Our ask

To realise our full economic and housing growth potential, services from Norfolk and Suffolk to Cambridge must be more frequent and journey times improved. This will be crucial for Cambridge and West Suffolk, as West Suffolk forms part of the housing sub-region for the Cambridge workforce. The rail improvement recommendations from the Eastern Section Rail Study forms our ask to Government:

Rail Service Improvements

Short-term (pre-Central Section)

- Improved journey times between Ipswich and Cambridge and between Norwich and Cambridge.

Medium-term (at opening of Central Section)

- Direct half-hourly passenger rail service between Ipswich, Bury St Edmunds, Newmarket and Cambridge.
- Direct half-hourly passenger rail service between Norwich, Wymondham, Attleborough, Thetford and Cambridge.
- Potential for alternate hourly East West services to serve Ipswich and Norwich (i.e. two hourly through services from each location).

Long-term (post-Central Section)

- Direct hourly service between Ipswich, Bedford, Milton Keynes and Oxford, achieving a journey time of 120 minutes.
- Direct hourly service between Norwich, Bedford, Milton Keynes and Oxford, achieving a journey time of 120 minutes.
- Improved journey times between Ipswich and Cambridge and between Norwich and Cambridge. Achieving a rail journey time of under 60 minutes.
- A rail route through to Oxford and beyond that is attractive for freight.

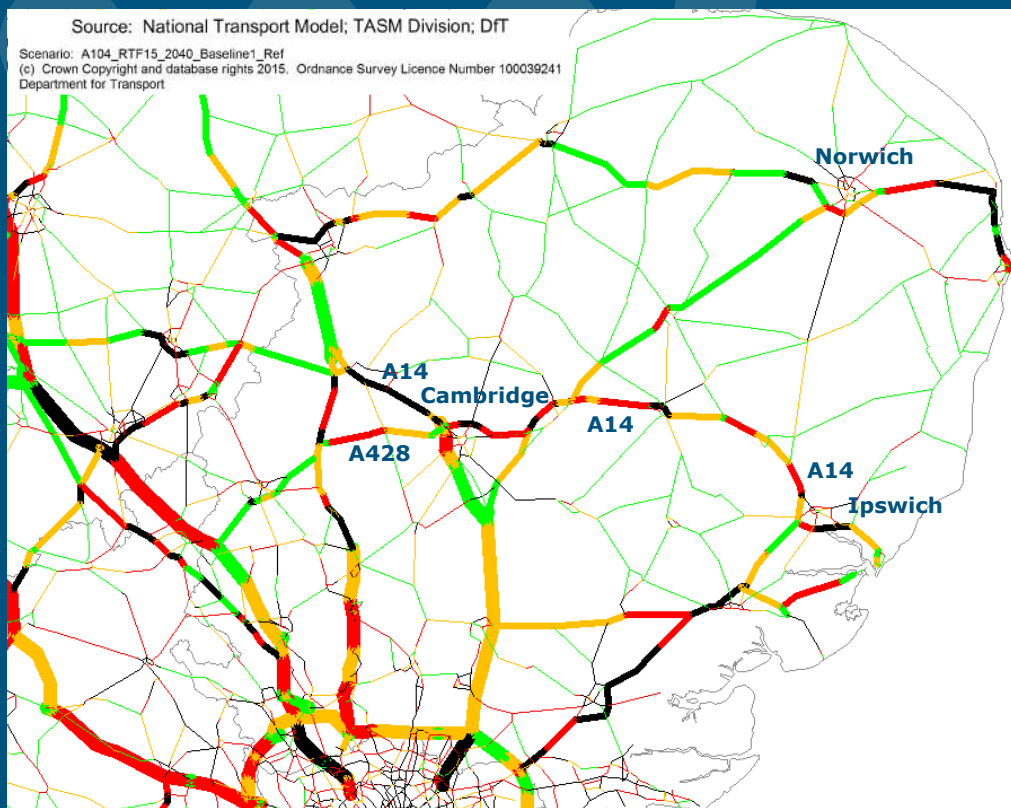
How rail improvements will unlock growth

The National Infrastructure Commission report states that although a series of separate labour markets exist in the East West rail corridor, commuting between key hubs is almost non-existent, exacerbated by poor East-West transport connections. Improving connectivity will enable intra-urban connectivity between growth locations in the Eastern Section – acting as a catalyst for growth. We believe that improved rail connectivity will help to address the following key transport challenges to growth:

Congestion on highway network

Delays on the A14 alone are estimated to cost business £360m per annum*. The congestion makes journeys unreliable and presents a major barrier to growth. Congestion on trunk roads in the Eastern Section (the A14 and A11) will be exacerbated with additional housing growth creating a barrier to economic growth. The A14 Challenge was launched by business leaders and the public sector to boost economic growth and support new housing. Addressing highway capacity is one element of the work: the £1.5bn A14 improvements between Cambridge and Huntingdon have commenced, but other transport solutions are sought east of Cambridge, to reduce demand on trunk and local roads.

Map showing predicted stress on the road network 2040 levels based on volume to capacity ratios in peak periods
(map courtesy of DfT)



Existing road journey times from Norwich and Ipswich



Forecast increase in road demand TO 2026*



Cambridge North
Railway Station



Long journey times on road and rail

Car journey times from Ipswich and Norwich to Cambridge, Milton Keynes, Bedford and Oxford are unpredictable and slow with average journey speeds of around 45mph. Rail journey times between Ipswich, Norwich and Cambridge are also too long at approximately 1 hour 20 minutes. Rail journeys to Oxford take 3 to 4 hours with an interchange required at London.

Inadequate rail service frequency

Hourly services from Ipswich and Norwich to Cambridge are frustrating for passengers, making rail journeys impractical for business users or for passengers travelling further afield and when needing to connect with other rail services.

Passenger rail services at capacity

Network Rail's Anglia Route Study states that the Great Eastern Main Line is at capacity and that by 2043 an additional 5 to 6 trains will be required in the peak period between Norwich, Ipswich and London Liverpool Street to meet demand. Rail services using cross country routes via Ely are also at capacity. Additional services cannot be provided without further investment in infrastructure, in particular at Ely.

Seating capacity

Network Rail's Anglia Route Study also states that by 2019 the amount of seating capacity is constrained on cross country routes from Ipswich to Cambridge/Peterborough, Norwich to Cambridge and King's Lynn/Ely to Cambridge. It is important that these issues are addressed. Passenger experience is key to encouraging more people to use the train, with frequency, seating capacity and punctuality crucial to potential passengers' propensity to try rail travel. We also wish to see commitments and associated funding to improve rail travel experiences written into every rail operators franchise promise to passengers, as without the relevant funding or incentives (usually linked to infrastructure and rolling stock enhancements), it is difficult to fulfil such commitments.

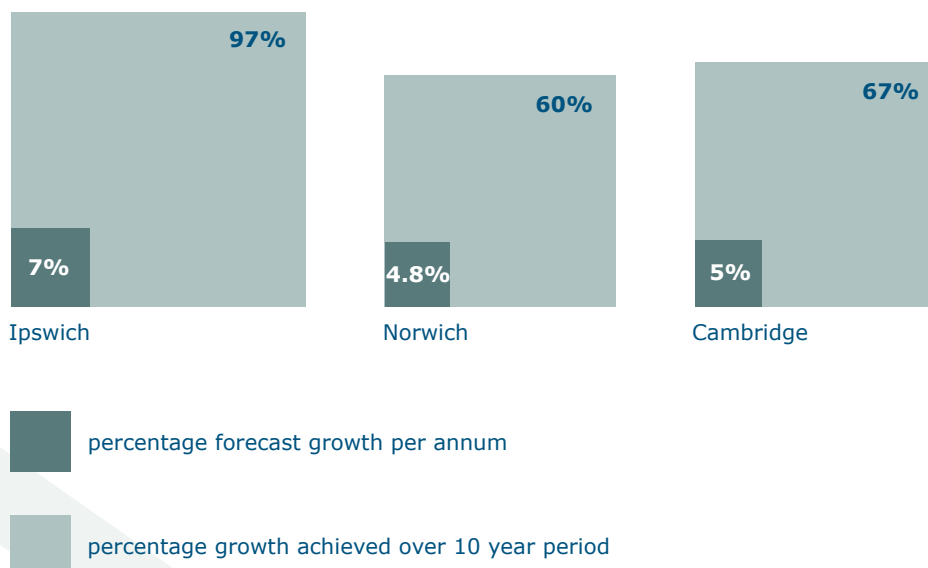


Cambridge North
Railway Station

Rail demand is growing

Rail passenger demand on cross country routes via Ely is growing. Housing growth and the use of mobile technology for work on the train have increased the volume and range of commuting. Passenger demand to and from Cambridge has grown by more than 5% in the last 10 years (increasing passenger footfall by over 66% over a ten-year period) - greater than any other UK city. Network Rail's Anglia Route Study predicts increasing demand on the Norwich and Ipswich routes which can only be met by further improving frequency.

Passenger footfall growth demand*



* Forecast demand developed by Network Rail, based on demand trends and predicted housing growth



Moving forward...

The Eastern Section forms an integral part of East West Rail. The improvement of the Eastern Section will support growth and enable East West Rail to be a strategic and resilient rail link, which will be vital for the successful operation of the Central Section and beyond.

Over the next 2 years, the East West Rail Consortium will build on the strong business case that has already been presented in this rail prospectus. The Consortium will work with Network Rail, Greater Anglia, Local Enterprise Partnerships, Transport East and the Department for Transport to identify funding streams and rail solutions to improve rail links between Norfolk / Suffolk and Cambridge.

The East West Rail Consortium will accelerate job and housing growth in areas that are served by railway stations – working with business leaders, communities and developers. It will also work with the East West Rail Company, Local Enterprise Partnerships, Chambers of Commerce and partners in the Central and Western sections. This work will strengthen business links and ensure that the rail service connects with areas of current and future growth, supporting our key industries. Where there are areas of growth that are not located close to stations, the Consortium will work with public transport operators to ensure good links and transport is provided to the railway stations – as well as improving rail accessibility for villages in Norfolk and Suffolk. Our work with public transport operators will extend to ensuring railway stations provide the necessary facilities and accessibility for all.

The Consortium will build on global connectivity by working with the ports and airports, strengthening supply chains through demonstrating fast and reliable links to London, Cambridge, South West, Peterborough and beyond. Through the development and promotion of local freight centres we will reduce the impact of local deliveries on the highway network.

With the necessary support, the Eastern Section rail improvements could be in place during the early and mid-2020s. As indicated in this prospectus, the Eastern Section already exists and is therefore an early win with enhancement work. Such investment provides an excellent financial return to the UK economy and communities.



For further information
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