WestCoast
Improving Your Railway

Passenger Management during Major Engineering Infrastructure Works

Passenger Management during Major Engineering Possessions

Experience gained from the West Coast Route Modernisation Project

This document is made available by DfT on behalf of Network Rail and Train Operating Companies operating on the West Coast Main Line (WCML). Thanks are due to the representatives of Passenger Handling Strategy Groups both for the preparation of this document and their achievements in keeping the route open for business whilst very substantial infrastructure works to enhance and renew the WCML have taken place.

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CONTENTS

1 PURPOSE

The purpose of this document is to share knowledge and experiences gained about the management of passengers during the upgrading and renewal of the West Coast Main Line (WCML), particularly where a number of train operating companies (TOCs) were involved. The document is not exhaustive nor a process for standards to be adopted, but is intended to assist the appropriate departments of industry, companies and their contractors to minimise expenditure and loss of revenue, sustain a good service for passengers, whilst maintaining efficient operations.

Reference is also made to work connected with the closure of Ipswich Tunnel, where previous experiences from the WCML and new methods were used to plan replacement services and manage passengers.

The scope of the document deals with *planned* engineering work which interrupted normal train services.

Health and Safety is paramount. In all their work, train operators and their contractors successfully managed this key area and conformed to legislative and railway industry standards.

2 SUMMARY

The rail industry has shown that it can confidently deliver major infrastructure work, whilst keeping the route open for business.

Recommended approach:

- make sure passengers know what is happening as far in advance as possible, the reasons why and the duration of the disruption. They can then plan accordingly and their loyalty will be retained.
- form a team made up of representatives of each “player” - all the affected passenger train operators, their road transport providers and Network Rail - to strategically plan and manage operations of this nature on a route basis.
- form a working group made up of representatives of each “player” - all the affected passenger train operators, their road transport providers and Network Rail - to manage operations of this nature on an area, blockade or possessions basis.
- empower them to work collectively, take decisions and have authority to ensure their employers can execute the actions tasked to them.
- understand passenger flows, designing road services around such movements - this may not mean replicating the railway system.
- there should be a single replacement road network, not one for each train operator.
- provide for flexibility in contracts, in particular with bus/coach operators, as passenger numbers and traffic conditions will vary.
- be imaginative and make full use of alternative rail routes.
- plan on the basis of what roles/jobs need to be done, regardless of the person’s employer, to save on duplication/waste.
- provide training for all staff, regardless of employer to deal with basic passenger enquires.
- maintain a close relationship with stakeholders - especially highway and local authorities - securing their co-operation and support. Brief them early and use their expertise.
- review operations regularly and collectively to manage changes (e.g. passenger numbers).
- collectively plan, manage and review rail replacement management contingency plans.

3 BACKGROUND

The original West Coast Route Modernisation Project (WCRM) was launched by the SRA. This was targeted at achieving completion of a project that had previously been both running behind schedule and facing spiralling costs. It has been successful in reversing such trends.

Under plans led by the SRA, but with the co-operation of all parts of the railway industry, a series of outputs were agreed. Importantly, the method of achieving this work was also agreed between Network Rail and the various TOCs. It was concluded that some complete blockade of lines, as opposed to extensive numbers of weekend and/or over-night possessions, was the most cost-effective and time efficient solution. Simply, work could be completed more quickly at an overall lower cost, with less prolonged impact on passengers.

All blockades disrupt normal passenger travel arrangements, generate additional costs through the provision of alternative services/additional staff required for rail replacement operations and cause overall loss of revenue. These factors had to be balanced against the need to deliver the WCRM project deliverables.

The scale of the work was such as to focus all involved with the project, the desire to minimise haemorrhaging of business and not allow unnecessary expenditure to take place. At the start, there was a tendency to over-provide provision of replacement road services, but experience has subsequently provided a much greater degree of sensitivity in matching supply with demand. The task, and indeed the growing skill of those involved in the West Coast work, has been to balance good quality alternative road and rail services, with a prudent eye on value for money.

These notes show how these matters were addressed. Not all have yet been solved, but sufficient has been achieved to share the experience with a wider audience and possibly enable others to benefit when planning for similar work on other routes.

It can also be used as a basis to re-examine the management and provision of rail replacement operations under normal, planned, regular infrastructure works/possessions

3.1 POSSESSIONS AND BLOCKADES

Virtually the entire WCML has had to be renewed and upgraded and therefore has been affected by engineering activity of varying degrees of intensity.

Until September 2004, work was carried out throughout the week on a 24/7 basis under a series of blockades in specific areas of the route or by using whole weekend closures. Since then, engineering possessions have been largely confined to weekends, enabling a full service to be operated on Mondays - Fridays.

However, major closures, either complete blockades or weekend closures over a very prolonged period, have been necessary.

Examples of these include:

- the route between Colwich and Cheadle Hulme, where rail services were suspended between May and September 2003. Sixteen stations, including Stoke-on-Trent, Congleton and Macclesfield were either fully or partially deprived of their normal rail service.
- from autumn 2003 the line between Crewe and Stockport was affected. Weekend closures also applied on this line between September and December 2005, with a full blockade once more from then until June 2006.
- weekend/bank holiday closures have taken place to re-signal and re-model lines in the Stockport and South Manchester area, including a nine week blockade during the summer of 2004.
- weekend/bank holiday works were necessary on the Coventry corridor route between Rugby and Birmingham, including the period when the International Motor Show was taking place at the National Exhibition Centre at Birmingham.
- during a large part of late 2004 and in 2005, the route north of Crewe throughout to Liverpool/Scotland was closed at weekends, directly affecting twelve stations.
- in the south, during the summer of 2004, there was a complete blockade between London/Hemel Hempstead and Milton Keynes/Northampton for two weeks, and for virtually the entire three years, this section has been closed from Saturday night to varying times on Sunday morning, impacting on long distance weekend travel.

At present, weekend blockades continue, for example, to affect parts of the West Midlands and the Trent Valley section of the route.

Until completion of the WCRM project in late 2008, further weekend/bank holiday possessions will be needed.

4 INDUSTRY PARTIES WORKING TOGETHER

The SRA Strategy for WCRM, now led by DfT (Rail), had evolved through all industry co-operation. At the start of the project, it became clear that effective delivery of the project, a 'value for money' approach and minimisation of disruption to passengers, required a high degree of team work between the project partners, particularly Network Rail and the TOCs.

No single party had the resources or expertise to tackle the whole problem of managing passenger movements whilst substantial elements of the railway were blocked or disrupted.

It was quickly realised that much time, money and effort could be saved if all TOCs combined their pre-planning discussions both with one another and Network Rail. To give passengers and stakeholders confidence, it was also important to promote "the railway remains open for business", rather than allow the view to grow that the West Coast route and associated services were unavailable to passengers, causing damage to both the business base and revenue.

4.1 PASSENGER HANDLING STRATEGY GROUPS

To focus and sustain this co-operative venture, a Passenger Handling Strategy Group (PHSG) for the North was formed, initially meeting monthly but now as and when required. This was followed a year later by the formation of another PHSG for the South, in principle to cover operations in the Midlands area. They consist of representative(s) from each Train Operator, Network Rail (both Project Finance Managers, press/media liaison staff and major Station Managers), road transport providers (Fraser Eagle, First Group and National Express as applicable), and the Department for Transport (Rail), formerly the SRA.

The value of the initial meetings soon became obvious, covering:

- briefing, understanding and strategic planning of future works
- formulation of necessary arrangements for rail replacement services and altered/diverted rail services
- passenger handling within station environments
- elimination of possible wasteful duplication of services or staff
- forum for the resolution of problems encountered
- contingency planning
- inter-company co-operation and co-ordination.

An important aspect dealt with by the PHSG meetings is the examination of previous work, enabling the group to identify those aspects which went well and those from which 'lessons could be learned' and avoided in the future.

One key to success has been to ensure that the right people attend and become involved with and committed to the whole process. Such people must either be empowered to take many of the required decisions themselves, or seek such direction quickly from appropriate colleagues who hold the necessary authority.

This has reduced, and in many cases eliminated, duplication of both staff and bus/coach resources to the extent that the estimated financial saving during the last three years has been around £3,000,000.

Examples

Initially, binding contracts had made over-provision of vehicles difficult to remove without incurring heavy penalty payments, thus minimising any savings. These were renegotiated during the original Stoke blockade. As a result rail replacement routes were organised and pooled so as to be operated by only one TOC/Operator per route. It was possible to remove peak duplicate workings between Stoke and Stafford, thus saving about £24,000 a week.

Following a study of the actual numbers of passengers travelling and the road traffic conditions encountered by the vehicles, rescheduling of the Central Trains service between Stoke and Stafford during 2004 enabled a saving of £100,000 a year. The withdrawal of the underused service north of Etruria produced a saving of the same amount. A further saving has been made along this corridor by the full integration of the Stafford-Stoke service with a local bus route.

The Wilmslow-Macclesfield link (to cover the closure of one of these routes, leaving the other open) has seen costs reduced by around 300-400% as the service has been tailored solely to demand. An arrangement to accept rail tickets on an existing local bus service between Wilmslow and Manchester Airport produced savings of around £1,000 a week during the first Crewe line blockade.

A revised timetable to drastically improve efficiency on the original Trent Valley Central Trains bus service produced savings of £300,000 a year, whilst actually improving the service, with a further £100,000 a year after partial re-introduction of the train service.

However, the greatest savings have been made on services operating north of Crewe to Carlisle and Scotland. A core network of vehicles was quickly reduced from 141 to 83 in April 2005 in the light of operating experience. Estimated savings of £800,000 a quarter were achieved and these continue during each period of line closure. By 2005, bus contracts were deliberately designed to allow a much greater flexibility, with a lower core number operating, and the ability to adjust stand-by and relief vehicles on a weekly basis. These savings have only been made possible by this flexibility.

These improvements show what can be done through sharing information and ideas between all participating train operators, their road transport contracts and Network Rail, with a combined willingness to get the best product.

4.2 PASSENGER HANDLING WORKING GROUPS

A Working Group was established to manage the operations in detail for the works north of Crewe, due to the nature of the operations, length of route and diverse requirements. Meeting weekly and attended by local management directly involved in the rail replacement operations, the group was able to manage in a very pro-active manner.

Examples

Schedules for rail replacement coaches were based on one coach for each journey. Stand-by vehicles were used to support journeys where more than one coach was required. The number of stand-by vehicles used was assessed on a weekly basis using figures/information from the previous weekend at the Working Group meetings on the Monday of each week. For each specific weekend other local circumstances/events were taken into account (e.g. Wigan Beer Festival, football matches, Blackpool Illuminations).

During the winter period Blackpool Pleasure Beach offered reduced/free admission. Large parts of the North-West took advantage of this offer with the number of travellers swelling at such times (and into early Sunday morning returning!). To manage this flow, special services were provided direct from the rail interchange point (e.g. Bolton) direct to Blackpool Pleasure Beach as compared with scheduled services that operated via stations through Preston.

This Working Group format has been used effectively in the London area for operations south of Milton Keynes since 2002, when the route was closed for 18 consecutive weekends. The challenges of this group included football travellers, concerts at Milton Keynes and the diverse nature of passenger journeys from local travel to long distance. Local and British Transport Police attended these meetings which provided a helpful input into the management of operations.

Example

At both Hemel Hempstead and Milton Keynes stations it was necessary to implement a detailed traffic management plan due to the high number of rail replacement vehicles and passengers. This involved separate access/egress to/from trains/rail replacement vehicles and the segregation of local/long distance passengers into respective services. All of this was managed with short-stay parking, taxi and pedestrian movements being taken into account. Traffic Management Orders were obtained at Milton Keynes with the local and BT Police managing traffic movements in the station areas.

This practice of Working Groups was found to be extremely valuable and was subsequently extended to other specific areas of the route (e.g. Rugby-Coventry-Birmingham).

5 THE PROCESS

The first stage of the whole operation begins with notification from Network Rail of required possessions in line with contractual requirements (Rules of the Route/Major Project Notice/Possession Strategy Notice). In order to meet the timescales to deliver WCRM outputs, it has been necessary, in certain circumstances, for Network Rail to propose new or changed possessions at short notice or, in a couple of instances, for planned work to over-run for a number of days/weeks.

This has resulted in non-compliance with 'Informed Traveller' timescales, presenting a significant challenge to the TOCs in terms of planning, publicising and implementing revised train or Rail Replacement bus services. The PHS groups provided a forum for discussion to take place on such changes and on how to minimise the adverse impact upon passengers. A spirit of co-operation was thus engendered across the industry "players".

Such joint co-operation and evaluation has also allowed proposals for engineering work throughout the rail network to be harmonised, especially to ensure that as much as possible of the system could remain.

Examples

A dialogue with Network Rail ensured that work on a section of the ECML north of York to Scotland did not take place at the same time as blockades on the WCML.

Similarly, closure of the Trent Valley has not occurred at the same time as that of the Coventry corridor.

Possessions were also changed in the Birmingham area to allow train access to the International Station, providing a shuttle service from New Street during an exhibition.

Times/days of possessions were also changed to fit in with TOC passenger business needs.

It has to be recognised that the major costs of the WCRM Project are centred on the engineering side, with expenditure on the Passenger Handling Management aspects and TOC revenue losses incurred a relatively small proportion of the total (10-15%). Changes to the engineering implementation plan can, however, have a major impact on passenger numbers and costs, along with additional pressure on TOC teams revising/publishing timetables as well as long-term revenue implications.

5.1 PASSENGER FLOWS AND USING ALTERNATIVE ROUTES

The initial step when planning replacement services is to identify the main passenger flows in terms both of volume and direction, rather than merely replicating train movements. Simply moving people from railhead to railhead/destination in direct replacement can be both less cost effective and inconvenient to the passenger.

To plan effectively for the replacement operation during blockades, it is suggested that surveys of passenger numbers travelling on routes to be closed are carried out prior to an operation.

There have been a number of instances where displaced rail passengers have been conveyed by alternative rail services, thus reducing the need to provide extra, and slower, road services.

Passengers have been conveyed by trains making additional stops at stations en route, subject to sufficient capacity being available.

Examples

Extensively applied to the Ipswich Tunnel closure scheme in 2004, direct peak hour coach services from a variety of East Anglian destinations such as Felixstowe and Stowmarket operated to and from the railhead at Manningtree, thus avoiding Ipswich and yet another change of travel mode.

During the 2003 Stoke line blockade and subsequent Crewe line closures, passengers were ferried between Stoke, Crewe, Macclesfield and Wilmslow as appropriate, to particularly assist their journeys to/from Manchester. Peak hour services were also operated from the smaller commuter stations to the open parts on the Crewe/Stoke-Stockport routes.

The 2004 major blockade between Northampton/Milton Keynes and Watford affected many London-bound commuters, and saw passengers taken across to other main or commuter lines, thereby reducing their road journey. These included Milton Keynes/Bletchley to Luton Parkway, Leighton Buzzard to Aylesbury, Tring to Wendover and Northampton to Wellingborough.

Perhaps the most high profile of these was the operation of direct Midland Main Line services to link Manchester and London via Leicester, keeping open one of the busiest long-distance rail links in the British Isles, and certainly contributing to minimising the otherwise heavy, long-term passenger losses.

When line closures have taken place in the West Midlands, blocking direct Birmingham-London services, arrangements have also been made to convey passengers via Chiltern Railways. This included in 2004 special direct services from London Marylebone to Birmingham International for the Motor Show (the date of this having been moved after the possessions were booked).

5.2 CONTAINING BUS USAGE

Prior to the formation of the PHSGs and a co-ordinated approach to engineering work, there had been a tendency to over provide road replacement services and resources. This may have been an attempt to mitigate the loss of a train service, by ensuring that there was a constant availability of buses to both cope with passenger volume and reduce waiting at stations. This over-provision did not present a good image to the Industry, and certainly did not represent good value.

Efforts to reduce the amount of bus travel have been particularly successful along the WCML. The pre-surveying of passenger volumes and a cautious/corporate approach to the provision of vehicle capacity, together with the pro-active management of stand-by vehicles on all schemes have resulted in the financial savings described earlier.

On some local routes used by commuters/scholars or weekend visitors to resorts such as Blackpool, and certainly during the closure of Ipswich Tunnel, passenger volumes have not reduced drastically. However, on the majority of routes, no matter how efficient and well organised the road services are, the pattern of temporary passenger losses are often in the region of 50%, frequently rising to 80%.

5.3 OPPORTUNITIES TO CONTINUE SERVICES LONGER TERM

Further advances in the transfer of rail passengers to normal local bus services have been made more recently.

Central Trains, in partnership with Staffordshire County Council, currently convey Norton Bridge rail passengers on a local bus service between Stafford and Stone. The train operator also entered into partnership with Staffordshire University and a local bus operator to modify a service which was originally designed to meet the needs of students. As a result, local rail passengers travelling between Stafford and Stoke (especially those boarding and alighting at Barlaston and Wedgwood) presently use this service rather than a dedicated rail replacement operation.

These developments have enabled the complete withdrawal of the “bespoke” Central Trains replacement services linking Stafford and Stoke, saving in excess of £250,000 a year.

5.4 PLANNING FROM EXPERIENCE

During the 2003 closure of the line through Stoke-on-Trent and Macclesfield, peak services to assist commuters mentioned previously were initially poorly supported. Clearly, experiences of attempting to drive into Stockport, and for some, Manchester, and the confidence that a connecting bus would always be available on return, brought many back to the railway.

Where passengers have not had the opportunity to be taken across to other routes and have to travel by bus/coach replicating the rail route, it is important to ensure that, where feasible, ‘express services’ between the main centres are operated. Examples of this have been Hemel Hempstead-direct-Leighton Buzzard (leaving Berkhampstead, Tring and Cheddington to slower services); Northampton-London (Euston); Crewe-Preston and Preston-Carlisle, with slower services making intermediate station stops.

Experience has demonstrated the benefits in planning services corporately. This had not been fully appreciated during the first major blockade. Virgin Trains had concentrated on other Inter-City railheads, First North Western on the Macclesfield route, leaving Central Trains to replace their Stafford/Crewe/Blythe Bridge-Stoke stopping services. An over-estimation of passenger numbers resulted in both Central and Virgin trains operating non-stop services between Stoke and Crewe (serving both long-distance and local travel with Crewe as a railhead), often within minutes of each other. Vehicle specifications had varied between the two TOCs, sometimes resulting in a well loaded minibus preceding an empty luxury coach. By agreeing joint timetables between the two TOCs with one contractor for future closures of this route, improved financial efficiency was obtained.

5.5 CORPORATE PLANNING

The value of corporate planning was demonstrated during the first (of many) closures between Stockport and Manchester. At least four TOC services had to be replaced along this section, and it would be wholly impractical for each operator to replace just their own trains. With one lead bus operator, both scheduled and stand-by vehicles and control staff have been saved. Resource savings of at least 20-30% were achieved over the cost of working in isolation.

The corporate approach, apart from a financial advantage, eradicates the problem of two sets of contractors and their staff trying to work together at a station. The public only see one set of people, and however much effort each contractor's staff make to be helpful, constantly having to refer or direct the passenger to somebody else can create a very poor impression.

5.6 COMPETITIVE TENDERING

Network Rail, recognising the benefits of a corporate approach, and in partnership with the TOCs, embarked upon two corporate tendering schemes for the supply of Rail Replacement services. This approach also recognised the fact that TOCs, such as First North Western/Northern Rail, have been adopting a policy of competitive tendering for all their pre-planned rail replacement services procured for WCRM, thereby giving "best value".

Two schemes have been operated so far, and the WCRM model has been based very much upon the successful Ipswich Tunnel blockade in 2004, when the line was closed for over a month between Ipswich and Manningtree.

The two line operators at that time, Anglia and First Great Eastern, prepared a joint bus replacement plan and a contract for a supplier, and then submitted this for open tender. This was a SRA led scheme, and the time scale from plan preparation to implementation was almost one year. Whilst the section of closed route was reasonably simple and with no intermediate stations, it has to be remembered that many passengers were travelling from all parts of Norfolk and Suffolk towards London and vice versa, with no opportunities to be ferried to alternative railways.

A series of meetings took place between the TOCs, Network Rail and the SRA, who provided advice on the suitability of vehicle types, running times and other aspects of bus operation with which many TOC staff were not familiar.

Four bus operators submitted bids, alongside a "ghost" or comparative costing prepared by the SRA with which to measure submissions. There was a surprising variation in bid costs, with the lowest price, and ultimately successful bidder, little more than half the price of the highest priced bid. The highest price was submitted by a local undertaking who was perhaps only experienced with weekend work of this nature.

5.7 TRANSFERRING THE EXPERIENCE

Network Rail has sought to transfer the experience of this very successful Ipswich blockade to the WCRM, first on the Coventry Corridor during weekend blocks in autumn 2005, and later during the full line blockade from Crewe to Stockport, from December 2005 until June 2006 (originally Spring 2006).

Both schemes have been successful, with few operating problems, high passenger satisfaction and a lower cost of operation. In the case of the Crewe line, these costs were 6% lower than similar services operated in 2004. Both operations have been worked before, and planning was formulated on previous experience. Numbers travelling have been reasonably predictable for the Crewe-Stockport service, as disruption was mostly confined to local Northern Trains passengers. However, with the Coventry Corridor, major events in the Birmingham area have made assessments a little more difficult.

5.8 CONTRACT FLEXIBILITY

The ability to provide contract flexibility within the tender has been a major key to success. Prior to this, the bus contractor prepared a fixed schedule based upon TOC requirements, ensuring the PSO requirement was met. Within the Coventry Corridor tender, as outlined above, this was not possible. Based upon previous experience, accurately estimating weekend numbers travelling within the West Midlands area was challenging, especially given the different sporting and social events taking place each week, alongside very heavy, but varying numbers of shoppers travelling to Birmingham.

The timetables were constructed around a minimum ‘core’ service, with extra vehicles for each departure at known busy times, and with the ability to vary stand-by and relief vehicles on a week to week basis. Thus, the vehicle supplier was not locked into lengthy contracts with bus/coach operators supplying unwanted vehicles every week. Whilst the short notice hire of vehicles marginally raised costs, the financial experiences of previous blockades, where it would have been more expensive to return unwanted vehicles than keep them, were avoided. Due to the varying nature of service levels each week, it is not possible to quantify an actual cost saving figure but, importantly, any possible waste was eliminated.

5.9 INCREASED COMPETITION

A number of changes have taken place amongst bus/coach providers since the commencement of work on the WCML.

TOCs require a reliable day to day supplier to support their rail services and to deal with emergencies and the effects of short notice possessions. Operators such as Virgin Trains have found it cost effective to secure the same operator for this as well as for all pre-planned work.

Most TOCs are able to adapt to competitive tendering for each pre-planned work. In 2003, one major operator dominated the Rail Replacement market, but during the last few years, other major players have entered this business and it is not unusual for up to seven undertakings to tender for this work.

This has allowed the rail-replacement market to now operate in a more pro-active way, with the bus/coach operator being the focus of suggesting efficiency and new ideas to the TOC. It has always been recognised in the past that the TOC has the rail experience; the bus/coach operator the road experience. However, whilst not expecting the TOC to be fully conversant with the bus/coach operations, it has enabled a better understanding of each other's businesses to the benefit of both types of operator.

Whilst this has all been of great benefit in reducing Rail Replacement costs considerably, it has been recognised recently that there may be a limit to the extent to which prices can be further reduced. Future savings may be best confined to efficient use of scheduling vehicles and staff.

6 SPECIAL NEEDS PASSENGERS

The requirement to provide facilities for passengers with disabilities, which may preclude them from travelling by a replacement bus or coach, initially saw the deployment of special vehicles equipped for wheelchair use. Other vehicles were brought in for the conveyance of animals, mostly dogs.

Operating experience has shown poor use and the emphasis is now placed on a more cost effective option of making a suitable taxi available, as needed, for passengers requiring assistance. Expensive, special vehicles are now reduced in number, except in a few situations where accessible taxis are not easily secured.

The bus/coach industry has now moved into the area of accessible vehicles (especially buses). Although their availability outside normal day to day operations is limited, this opportunity to use such vehicles should not be missed.

Example

For the blockade of the Crewe-Stockport line in early 2004 the tender was awarded by (then) First North Western to First Group, utilising a dedicated fleet of low-floor single deck accessible vehicles which were subsequently moved to another area for day to day services.

One of the routes specified for the corporate tender of summer 2005 on the Rugby-Birmingham route was for low-floor accessible double-deck vehicles on the all stations service north of Coventry. This utilised vehicles normally used in the Birmingham area from Monday to Friday, when peak vehicle requirements are higher.

Both these examples resulted in the number of special vehicles for disabled passengers, etc., being eradicated or reduced.

7 STATION BUILDINGS AND FACILITIES

Station buildings may be construction sites themselves, as well as the railway passing through them. Normal waiting, refreshment and toilet facilities may be unavailable. At times, passengers may be diverted to smaller stations, possibly with restricted booking office opening hours, and few, if any, staff on duty. Waiting rooms, or indeed any undercover areas, may be unavailable, and many station forecourts both in rural and urban areas may be totally unsuitable for turning vehicles.

In the reverse, the nature of passenger movements within a station may change to becoming busier (other lines closed) and/or interchange is required between train and bus/coach when a line is blocked. As a result it has been necessary to improve station facilities and rail/coach interchange to provide an efficient service to inconvenienced passengers. In some cases this has brought long-term benefits to a station.

This has often meant evaluating the off station building area to make best use of car parks, station approaches and forecourts for the requirements of a revised operation. This could mean the creation/hire/lease of additional land to help manage an overall operation better.

Examples:

- *Temporary stairs to a platform at Hemel Hempstead to segregate access/egress and improve passenger flows*
- *Short-term access across a temporarily closed rail line at Milton Keynes and Crewe stations to improve the interchange*
- *Refurbishment of a disused area at Crewe to create a waiting room for passengers using a substantial network of rail replacement services*
- *Improvement of station facilities for increased passenger numbers as well as additional staff and temporary additional train crew accommodation at a number of stations*
- *Improved forecourt/car park layouts to match the level of rail replacement services to be operated to provide an efficient interchange and method of operation at a number of stations; e.g. Hemel Hempstead, Milton Keynes, Coventry, Crewe, Stoke and Preston*
- *Use of the normal station car park at Stoke as a temporary bus station, car parking being rented in areas near to the station*
- *Additional car parking at Hemel Hempstead and Warwick Parkway where passengers could drive to catch a train (normal service)*
- *The closure of the forecourt of Milton Keynes station to create specific areas for bus/coach interchange, taxis and additional pedestrian movements (required a Traffic Order)*

- *The creation at London Euston of a small coach boarding area within the confines of three temporarily closed platforms/road turnaround point*
- *Temporary hire at Hemel Hempstead of a tenant's parking area for access to a temporary coach parking area and siting of portacabins*
- *Creation of a short-term bus station on arable land at Manningtree*

Sometimes at stations it may also be totally unsuitable for stopping outside or even near-by. Therefore, fixed stopping places need to be secured in advance with, as necessary, local authority and police agreement, so that the relevant publicity can be prepared well in advance. At un-manned stations, clear signage/bus stop flags need to be implemented. Too often, missed passengers are a direct result of not knowing where to wait. Ideally, as the former First North Western, now Northern Rail do, TOCs should include clear maps of stopping places within their local route timetables and publicity.

Examples:

- Local stations on the Congleton-Stockport line
- Local stations on the Crewe-Stockport line
- Use of Ipswich Town FC car park as a commuter car park for rail replacement services to Manningtree during the Ipswich Tunnel blockade. This was also to prevent rail-heading to Manningtree.

8 PUBLICITY, INFORMATION AND COMMUNICATION

8.1 ADVISING THE PASSENGER

Advance information to passengers and their representatives is essential. Their understanding and forbearance is sought. Completion of a full communications plan, identifying MPs, regional and local authorities and user groups, especially Passenger Focus, is crucial. Specially arranged briefings were made to all such bodies. Getting information out early means passengers can then organise their travel arrangements accordingly.

Apart from providing local timetable guides, containing full bus replacement timetables or alternative rail services, experiences on the WCML proved it valuable to provide a regular project update brochure/poster. This was produced by Network Rail, outlining forthcoming engineering work and changes to services. Corporate branding was used on all such material.

Advance warning allowed all but a very small number of people to become acquainted with any forthcoming changes. Therefore, whenever work involved more than one TOC, as is always the case along the WCML, an easily recognisable corporate branding to all publicity has been used.

At larger locations, some success was achieved by ‘Meet the Manager’ sessions at stations with public meetings held normally in the local municipal buildings. Much potential criticism was thus ‘washed’ from the system before changes took place. Indeed, the aim was to ensure that all such stakeholders were fully aware of the rationale behind the plans and any advice offered could be taken into consideration.

For future exercises, greater account would be taken of web based information; passenger reliance on such systems increases rapidly.

8.2 CUSTOMER INFORMATION SCREENS

It has taken some effort to ensure that bus service information is properly displayed on Customer Information Screens (CIS) at stations. It was found that such information, particularly in the absence of readily available staff, was not always comprehensive. However, it is an area now showing great improvements: there are few stations on the WCRM that do not display bus service information on their CIS.

9 STAFFING

During the periods of WCML blockades, the establishment of Passenger Handling Groups has enabled staffing issues, and the avoidance of unnecessary duplication between normal TOC station staff and temporary/contactor (e.g. rail replacement), to be dealt with at the planning stage. However the public does not always appreciate the difference between TOC and bus contractor staff. Efforts should ensure that duplication is avoided, but all personnel should have some basic information on services and should be able to direct or reassure passengers accordingly, whatever their role.

9.1 TRAINING

During 2004, a scheme was initiated to train Fraser Eagle (the rail replacement contractor to Virgin Trains) personnel in Virgin Trains customer care and safety standards. This was to provide flexibility in the deployment of staff and give continuity of service throughout a journey that involved rail and road. It gave opportunities to avoid duplication of resources to provide a specific role, them becoming “multi-tasked”. This also avoided having to employ temporary staff who, experience revealed by the nature of them being Agency staff, had little knowledge of railway operations and geography.

The scheme was particularly successful because, at the time, most Fraser Eagle staff had wide experience working alongside Virgin Trains personnel, and many had formerly worked in the railway industry. With other companies now performing Rail Replacement work, the numbers of people with a railway background has possibly been reduced: therefore, training staff to the standard of Virgin Trains customer care staff (or equivalent) should be accepted practice now. It is essential that all staff on stations are aware of all operational aspects. Employing temporary Agency staff or untrained Customer Information personnel can be potentially counter productive.

At times, bus control staff from two different companies are to be found working together, and whilst experience so far has yet to provide any major problems, it would always be more desirable to either limit control to one supplier, or to ensure both are fully competent to provide information and assist the travelling public. Passengers should not have to distinguish between staff from different companies performing the same role but for different TOCs.

10 LIAISON WITH LOCAL AND HIGHWAY AUTHORITIES

The importance of linking up with local authorities, Passenger Transport Executives and, where applicable, the Highways Agency cannot be over emphasised. This can seek to avoid the risk, for example, of major and/or long term road works taking place at a time when substantial Railway Replacement services would be operating. It also allows their expertise to be used to help determine stopping and turning places, routeing, and publicity. Conferring closely with such authorities on a regular basis, put them fully “in the picture” so that those with highway maintenance and local transport responsibilities are working in the knowledge of what is happening with parallel transport modes.

11 REVENUE

11.1 TICKETING AND INTER-AVAILABILITY

Ticket inter-availability, allowing passengers to use alternative routes, has not been a major problem though ample time is sometimes required to reach agreement. Agreement was reached with TOCs to show flexibility over the routeing of passengers, including those with Saver or other tickets with restrictive availability. It is essential to retain the goodwill of passengers at such times but Revenue Protection staff need to be briefed accordingly.

11.2 REVENUE PROTECTION

With many passengers travelling on road vehicles where there may not have been any ticket checking, judgments had to be made as to the extent to which resources are deployed to protect revenue.

The frequent presence of revenue protection or other appropriately trained staff (e.g. station staff not doing their normal duties due to no/fewer trains) is helpful in this context, as they can also perform a useful role in giving information to passengers, provided training and briefing is given.

Road transport operators are now encouraged to have their own co-ordinating staff “look at” tickets and provide feedback on how many customers are arriving at the vehicles without tickets. This activity requires no experience but provides valuable knowledge as to whether full revenue protection is required.

12 CONTINGENCY

With the co-operation of all parties, the potential for over-running engineering work without some pre-planning has been largely reduced. Initially, some lack of liaison between Network Rail, their contractors and TOCs, caused several instances whereby notification of the line remaining “In Possession” came but a few hours before resumption of the train service. Even the resources available through a large undertaking, such as Fraser Eagle, was challenged in supplying the numbers of vehicles required for a Monday morning rush hour at such short notice.

This resulted in understandable criticism from passengers. Whilst communications between all parties involved are now much improved, it has become accepted practice to have a rail-replacement specific contingency plan in place: e.g. for a possible over-run of line work. A reasonable number of vehicles are stationed at key points, remaining available until early afternoon on the first day of train service resumption. Should an emergency arise, there is more time to source many extra vehicles for a longer period.

For major blockades a “Gold Command” has been established to ensure the smooth management of an operation and a point of contact at a Mid-Senior management level in case of issues/problems arising (e.g. over-run) for a complete operation.

A good communications plan between all the different parties of a rail replacement operation is essential. This must include TOC and Network Rail controls, who sometimes may have a lower regard for a rail replacement operation interface and who need to appreciate the consequences that could be brought on this operation from a rail only and/or engineering decision.

12.1 SHORT TERM CHANGES

Throughout the WCRM work, there have been issues with the ‘Train Service Data Base’ (TSDB), operated by Network Rail. There has been some inability to cope, particularly with short-term changes to the timetable. As a result, information and reservation systems are unable to function correctly. There are a number of factors involved, including reliance on a very labour intensive operation. Network Rail has fully acknowledged such concerns, and efforts to improve the situation continue.

Rail replacement operations need to take account of train service/possession planning arising from short-term planning as against long-term planning. In the past this has resulted in the need to have different operations each weekend over the same route(s) because of poor co-ordination.

In addition, instances have occurred where possessions in different locations over several weekends but on the same route (e.g. Crewe-Preston) have resulted in different rail replacement plans each weekend. They must also be co-ordinated and Network Rail is now more aware of this issue.

13 ONGOING WORK

The following issues are currently being pursued:

1. There is still a pressing need for greater flexibility in road service running times. Railways timetable data base functions with either one or only a very limited number of “sectional running times”. Rail Replacement services form part of that data base. This still inhibits further efficiency improvements. Road services, to work successfully and be attractive to passengers, need potentially a large number of different running times, reflecting actual traffic conditions. A single ‘core’ time is unrealistic - there can be variations of 100% or more between Monday - Friday peak travel times and that experienced in early morning Sunday traffic conditions. Importantly, the opportunity to operate with such flexibility enables improved productivity: fewer vehicles are needed with reduced journey times. Work has been completed successfully with Central Trains to achieve variable journey times but this has required a high volume of manual work to input the times of each individual journey. An early solution is being developed with Network Rail.

2. Passenger counts on Rail Replacement services, essential and necessary to determine correct service levels, both current and future, are now regarded as normal procedure. It is recommended that such data is filed and stored for corporate use in any future plans. The matter is being followed up through the PHSG.

14 COMMENTS

Comments on the content of this document, Passenger Management during Major Engineering Infrastructure Works, would be welcome.

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