



# London & South Priority Paper 2024

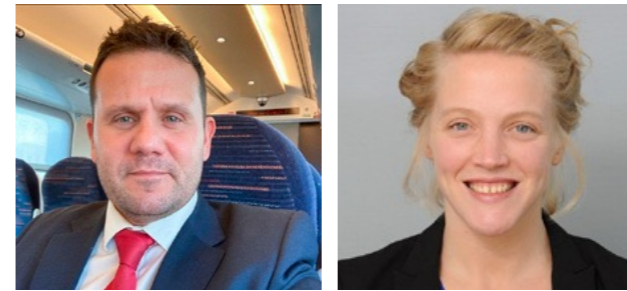
Shaping the Future of Rail  
in London and the South



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## Welcome from the Chair and Vice-Chair



We're excited to share the inaugural RIA London & South Priorities Paper. Whether you're a long-time member or a new client, this document is designed with you in mind. We've put together a clear and focused guide that highlights the key areas we believe are essential to our collective success in the rail industry across this vibrant region.

The rail sector in London & South is at the heart of our economy and daily lives, connecting communities and driving growth. However, it can be a challenging environment, with issues ranging from funding pressures to the need for more integrated transport solutions. This document aims to provide practical insights and actionable strategies to help you navigate these challenges. It's about ensuring you have the information and support you need to succeed.

### Working together

One of the things we're most proud of is how our industry comes together to tackle problems and create opportunities and we feel this document reflects that spirit of collaboration. We've focused on areas where we can make the biggest impact together- securing investment, building stronger relationships between clients and suppliers, and creating a more integrated transport future. These aren't just buzzwords; they're real priorities that we're committed to driving forward with your help.

### Looking ahead and the future of rail in London & South

We're all aware of the hurdles our industry faces, but with those challenges come opportunities to innovate and lead. This document is your tool for turning those opportunities into realities. It's packed with insights, best practices, and ideas that we hope will inspire you to push boundaries and find new ways to succeed.

### Let's keep the conversation going

We see this document as the start of a conversation. Your feedback, ideas, and involvement are what make our community strong. We encourage you to dive into the paper, share your thoughts, and join us in shaping the future of rail in London & South.

Thank you for being part of this journey with us. We look forward to what we can achieve together.

Warm regards,

**Ryan Anderson, Chair**

**Bryony Goldsmith, Vice-Chair**

RIA London & South Leadership Group

# RIA London & South Overview

RIA London & South is the voice for the rail supply chain across London and the South of England. We represent members of the rail supply chain, providing a guiding voice for the sector. Our Leadership Group of local industry experts works closely with clients and stakeholders to drive improvements across the region by contributing to RIA's continued engagement with politicians, stakeholders and the wider industry.

## Vision:

*"Shaping the Future of Rail in London and the South: Through uniting suppliers and rail industry clients, fostering collaboration and championing innovation we want to build a stronger, modern, efficient, integrated railway system for London and the South to create a connected and sustainable future."*

## Values:

- Collaborative,
- Honest, open and trustworthy,
- Innovative,
- Customer Focused,
- Value Driven.

## Purpose of RIA London & South

- Be a recognised railway industry body in London & South.
- Represent London & South supply chain interests to Government and key stakeholders.
- Form and maintain a view on the priority rail issues in London & South.
- Influence policy decisions via related campaigns, public affairs, lobbying, white papers, events etc.
- Ultimately, support a stronger, better, and dynamic railway as part of an integrated transport system.

## Rail supply community benefits

- Build insight and information to support RIA members to win business, mitigate risk and develop relationships and networks.
- Build stronger relationships between RIA London & South members and key stakeholders.
- Provide a stronger voice, through collective action, for the needs of members in London & South.

- Provide access to RIA resources for members in London & South.
- Promote innovation in the supply chain.
- Opportunity to showcase products and solutions through active involvement.
- Provide networking, education and collaboration opportunities at events in London & South.

## Stakeholder engagement

- Map local stakeholders (political, academic, industry) and facilitate direct engagement.
- Engage with and influence key rail decision makers in London & South.
- Establish, monitor, and manage priorities focused on outcomes for the three priority areas identified by the Leadership Group.
- Build up knowledge of the London & South railway industry issues and opportunities.
- Collate and define stakeholder 'problem statements'.

## We have identified three key priorities:

1. Integrated Transport and a Vision for the Future.
2. Securing Investment.
3. Building Stronger Client and Supplier Relationships.

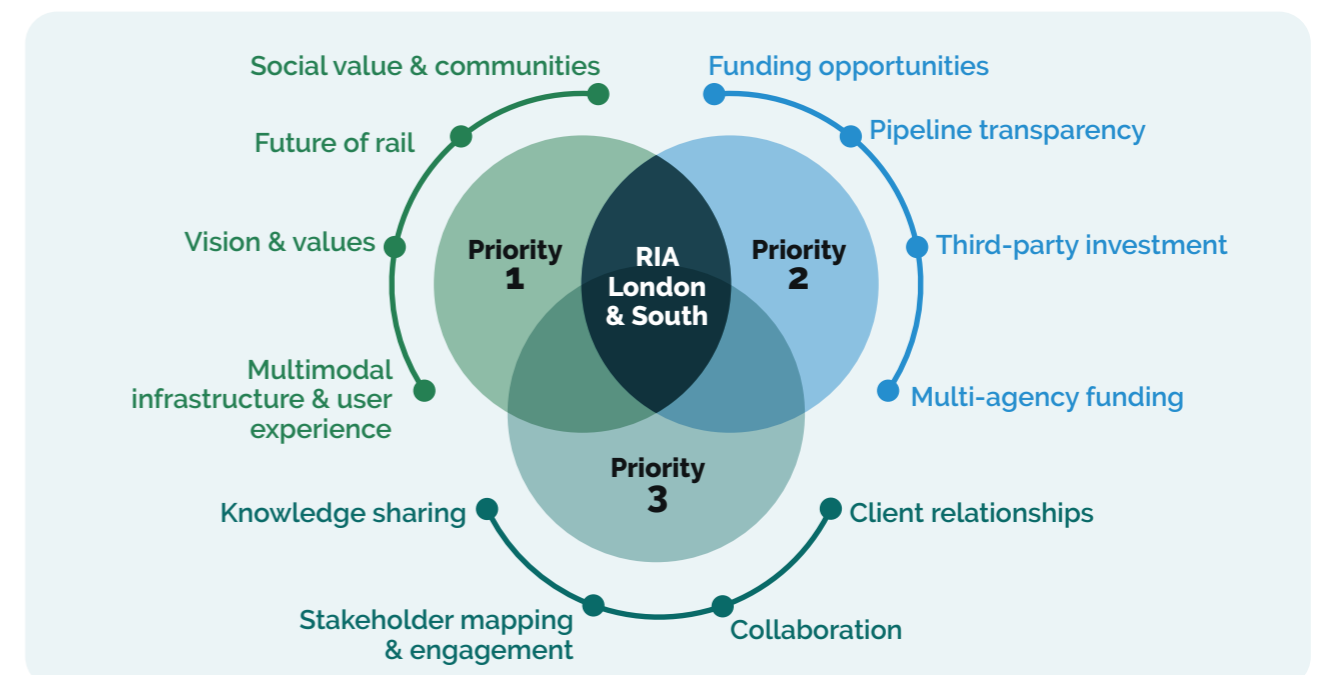
## Alignment of RIA London & South Priorities with National Objectives

RIA London & South supports the Railway Industry Association's national objectives by driving regional

priorities that align closely with the broader goals of promoting and modernising the UK rail system.

- **Priority 1 – Integrated Transport and Vision for the Future:** This priority promotes a seamless, modern rail network that aligns with RIA's national goals of upgrading low-carbon infrastructure and enhancing the rail system's role in sustainable transport. By championing an integrated approach, we contribute to a greener, more efficient future for UK rail.
- **Priority 2 – Securing Investment:** Our focus on securing investment directly supports RIA's call for leveraging private finance and ensuring fair cost-benefit assessments between public and private funding. By attracting investment into regional rail projects, we bolster the economic sustainability of the rail supply chain, driving innovation and growth in line with national objectives.
- **Priority 3 – Building Stronger Client and Supplier Relationships:** By fostering collaboration between suppliers and rail clients, RIA London & South aligns with the national agenda of sharing best practice and supporting a dynamic rail supply sector. Strengthening these relationships enhances industry efficiency, supports a sustainable supply chain, and drives the adoption of innovative solutions across the region.

These priorities reinforce RIA's vision of a collaborative, innovative, and customer-focused rail industry, positioning London & South as a leader in shaping the future of the UK's rail sector.



# London & South Market Outlook

In London & South, rail contributes £20.7bn GVA to the economy; supports 305,000 jobs and generates £6.5bn in tax revenue. It is an essential infrastructure, transporting people for work and leisure, unlocking business opportunities and offering green transport options to more than 18m people who live in the region.

## Market size:

- The passenger rail network in London & South accounts for approximately 70% of all UK rail journeys.
- The total number of passenger journeys in London & South exceeded 1.6bn in the last full reporting year (2022/23) while passenger revenue was around £5.4bn.
- The rail freight market in London & South has an estimated value of £1bn p.a. The region is critical for freight transport, especially for intermodal services, aggregates, and construction materials.

## Demand drivers:

- **Population Growth:** London & South are the most populous regions in the UK, with London alone expected to grow to a population of over 10 million by 2030. This growth drives demand for rail services, particularly for commuting and suburban travel.
- **Economic Activity:** London is one of the key financial centres in Europe, and the South is a hub for various industries, including technology, media, and pharmaceuticals. The economic activity in these regions necessitates a robust and reliable rail network to support the daily movement of people and goods.



- **Environmental Policies:** The UK government's commitment to reducing carbon emissions is a significant driver for the rail sector, as rail is a more sustainable mode of transport compared to road and air.

## Key funding and investment decisions:

- **Network Rail's Control Period 7 (2024-2029):** Network Rail has committed to invest around £44bn nationally during CP7, with a significant portion directed toward the Southern region to improve reliability and capacity.
- **High-Speed Rail (HS2):** Although primarily benefiting the West Midlands and North, HS2 has significant implications for the London rail network, with Euston station being the southern terminus and a new station at Old Oak Common being constructed.
- **DLR Line Extension:** The DLR extension would encourage growth and opportunities for people who live in the Thamesmead and Beckton Riverside regions of London with improved direct connects to central London. This includes support for up to 25,000-30,000 new homes, better connections across the River Thames and reduced car dependency. This would in turn help to support modal shift and the creation of up to 10,000 jobs stimulating economic growth.
- **Bakerloo Line Extension:** Extending the Bakerloo Line to Southeast London to support home and job growth.

## Key Clients:

- **Transport for London:** TfL's income and funding comes from a variety of sources, including revenue and funding from the UK Government. TfL have outlined £8.1bn planned investment in London's Road and Rail network in their 2023 Business Plan with £2bn planned annual investment over the next 5 years and £850m of planned contract awards scheduled over the next 2 years.

- In 22/23, TfL spent £6.5bn in the UK with 2,072 suppliers which supported £5.9bn in Gross Value Added (GVA) and 104,230 jobs.
- For every £1m of TfL spend, around 16 jobs were created across the UK. Moreover, above half (49%) of TfL suppliers were SMEs.
- Two thirds of TfL suppliers were based outside of London, in regions such as the South East, North West and West Midlands.
- A little less than a third of TfL spend and resulting economic impact occurs outside of London. Around 29,000 jobs were supported outside the capital by work carried out for TfL.
- **Network Rail Southern:** has 3,300 track miles, 4,966 bridges, 895 level crossings and over 8,000 signals. It carries 266 tonnes of freight a week and c.6,500 passengers a day.
- Enhancement funding has reduced from c.£1bn during CP6 to c.£330m in CP7.
- From the start of CP7 and throughout CP8, the Southern Renewals Enterprise (SRE) will be responsible for Network Rail's ten-year Southern renewals portfolio. The SRE comprises the Capable Owner (Network Rail), Southern Integrated Delivery (SID) partners and an ecosystem of supply chain partners. The SID partners are:
  - **Buildings and Civils:** VolkerFitzpatrick
  - **Electrification and Plant:** Octavius
  - **Track:** VolkerRail
  - **Signalling:** AtkinsRéalis
- Minor works will remain with Network Rail. The primary focus of these works is unplanned, planned and cyclical maintenance works. All works take place on Kent, Sussex and Wessex routes in Network Rail's Southern Region.
- **High Speed 1 Ltd (HS1):** is the Infrastructure Manager for the 67 miles of highspeed line between London St Pancras and the Channel tunnel and the four stations on the route: St Pancras, Stratford International, Ebbsfleet and

Region	Total Supplier Expenditure (£m)	Total No. of Suppliers	% of which SME's	GVA (£m)	Jobs
London	4,610	699	49%	4,120	75,270
South East	370	155	46%	520	8,870
Other Regions	1,540	1,218	27%	1,230	20,090
<b>Total</b>	<b>6,520</b>	<b>2,072</b>	<b>49%</b>	<b>5,870</b>	<b>104,230</b>

Source: TfL Economic Impact Assessment 22/23





## London & South Political Review

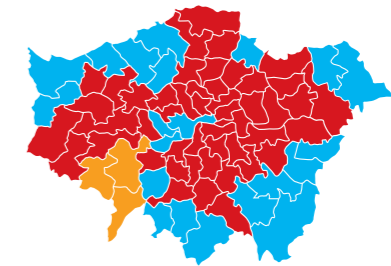
The London & South region comprises nearly 140 constituencies that have a significant influence on UK politics and transport strategy. This includes 73 constituencies in London, 18 in Kent, 18 in Hampshire, 13 in Surrey, 9 in East Sussex, and 8 in West Sussex. RIA London & South work closely with Inflect Partners, a leading Public Affairs Consultancy, to provide our members with the latest political insight and data into political stakeholders in the region.

The General Election on 4th July 2024 led to sweeping political changes across London & South. The Conservative Party lost swathes of seats to Labour and, to a lesser extent, the Liberal Democrats. However, the seats have an average majority of just over 5,000 votes, and many are much slimmer than that. London & South is set to be a key political battleground over the next 4-5 years.

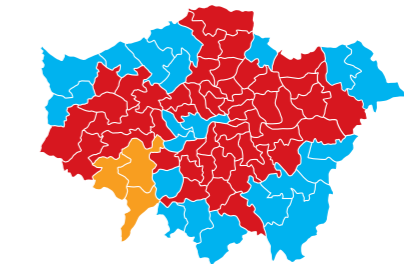
### Political analysis:

- Within Greater London, Labour has only extended its dominance. It gained a further 7 seats as the Conservatives dropped 11. The governing party now has almost 80% of constituencies in the capital:

2019 winners



2019 winners



Source: House of Commons Library – General Election 2024 results

Ashford. They contract the management of the route infrastructure and three of the four stations to Network Rail High Speed.

- In April 2020 Network Rail High Speed entered into their third five-year control period (CP3) which comes to an end in 2025. This control period has seen a shift toward more renewal works as the asset ages and it's anticipated this trend will continue into HS1's CP4.
- There are two train operators using HS1's tracks: Southeastern (70% traffic) – government owned, and Eurostar (30% traffic) – French state/private.
- HS1 estimate that by restoring high speed services to pre-covid levels and with an additional £15m of investment, the government could make Kent and the areas the route serves £110m richer by 2040.

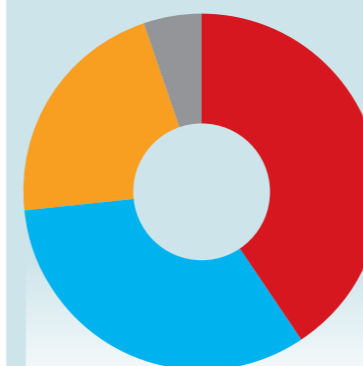
### Challenges facing the region

- **Funding and Cost Pressures:** Rising operational costs, coupled with the need for ongoing investment in maintaining existing infrastructure and a drive for efficiencies, pose financial challenges for all key clients across the region.
- **Long term TfL funding agreement:** The lack of assurance of a long-term funding agreement for TfL means larger/longer term opportunities are

left unfunded impacting the region's ability to grow and develop.

- **Pipeline transparency:** Delays in funding, sign-off, and release of work banks, within client organisations has impacted transparency of client and Tier 1 pipelines with the supply chain.
- **Aging assets:** As assets age they require greater attention and maintenance. As network capacity becomes more constrained, it opens the door for asset fatigue and failure.
- **Adverse weather:** Network Rail's Southern region experienced the most landslips of any region from 2023 – 2024.
- **Skills Shortage:** With limited pipeline visibility and an aging workforce there is a looming skills shortage within the industry as a whole which will particularly impact busy areas such as London & South.
- **Capacity Constraints:** Despite investments, the rail network in London & South is among the most congested in the world, leading to challenges in maintaining service reliability and punctuality.
- **Modal Shift:** The growing popularity of electric vehicles, cycling, and working from home represents competition for rail services, particularly for short-distance commuter travel.

### London & South election result in numbers:

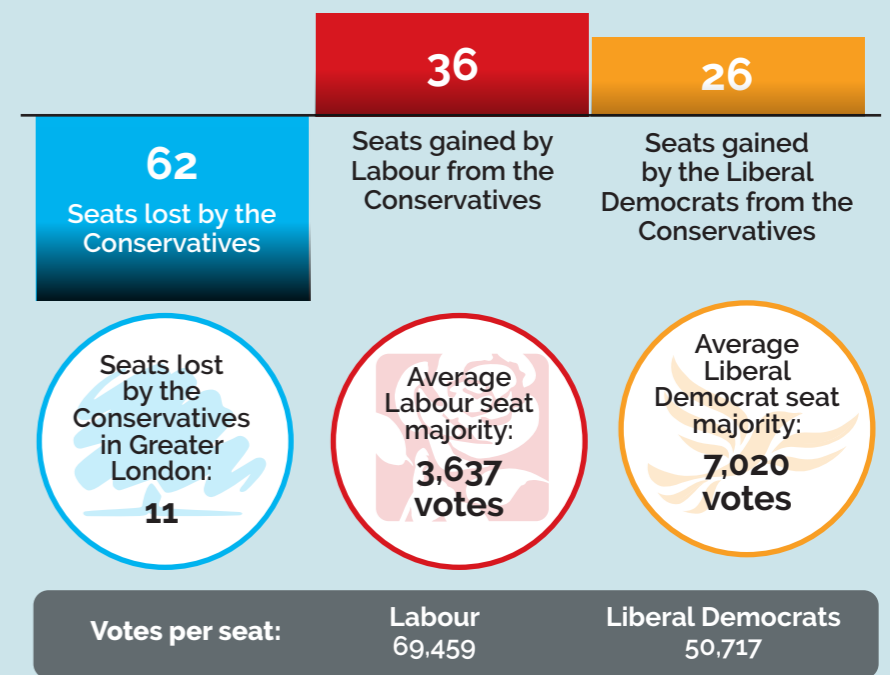


**Vote distribution:**

Labour	32.54%
Conservatives	26.26%
Liberal Democrats	17.16%
Others	4.09%

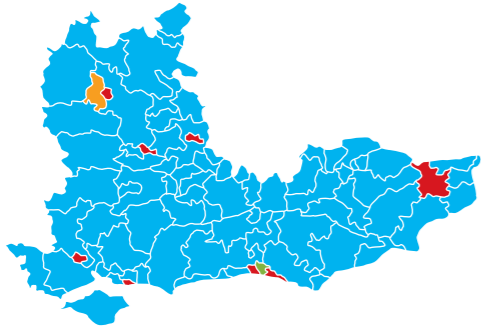


**Total seats:** Labour – 95, Conservatives – 39, Liberal Democrats – 30, Green Party – 1, Independent – 1

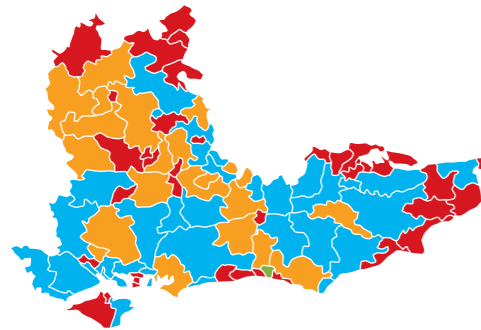


- Outside the capital, the story is one of complete Conservative collapse. Labour gained 28 seats and the Liberal Democrats 23. All at the expense of the Conservatives, who lost 51 seats – over half of the total number in the region:

### 2019 winners



### 2024 winners



Source: House of Commons Library – General Election 2024 results

- The significance of this result cannot be overstated – the map has been completely redrawn. However, the Conservatives may look for some hope in the size of the majorities. Within Greater London, the average majority of the newly gained seats is just 2,688 votes, and therein are some extreme examples, such as a majority of 15 votes in Hendon and 152 in Chelsea and Fulham. In the South, the average majority is 5,796 votes – slightly below the national average of 7,030. Seats held by the Liberal Democrats in the South enjoy more comfortable majorities, an average of 7,212 votes to Labour's 5,457.
- These dynamics set the stage for the political battle in London & South for the next 4-5 years. Labour MPs, facing smaller majorities, know they have a fight on their hands to keep their seats at the next General Election and will want to consolidate their wins in traditional Conservative leaning areas. With their Party in

government, their fate will inevitably be tied to its policy platform. Liberal Democrat and Conservative MPs, who will have their eyes on Labour's seats in the region, will undoubtedly be holding them to account.

- The Labour Government has already set out much of its immediate policy platform, and there are already some pledges which may conflict with its new voters in London & South.

### What will the new Government do?

- The first King's Speech under the new Labour majority Government outlined an ambitious legislative agenda, emphasising economic growth as the top priority. The speech outlined a substantial legislative agenda, with a programme including around 40 Bills.
- Some of the key legislation to look out for over the coming parliamentary session is:
  - **Rail reform:** Implementation of Great British Railways (GBR) and the nationalisation of most rail operators once contracts expire.
  - **Planning reform:** Speeding up infrastructure, land value capture, overruling local objections in national interest
  - **English Devolution Bill:** To allow more powers for devolved authorities on issues such as transport, including new frameworks for devolution and more county deals. Said aim is to give "mayors powers to create "unified and integrated transport systems"
  - **National Wealth Fund:** £7.3bn to be put towards the "new industries of the future" with "a remit to support Labour's growth and clean energy missions, making transformative investments across every part of the country".
  - **Housebuilding and new towns:** A framework to deliver the 300k homes per year, mandatory targets and new towns
  - **Employment Rights Bill:** Signals a new approach to industrial relations, including measures to remove some restrictions on trade union activity and simplifying the statutory recognition process.

### Other interventions and policies of note include:

- **International Investment Summit:** This summit taking place on the 14 October, will see the courting of global investment organisations such as BNY and Blackstone to leverage private investment into the UK.

- **Passenger Standards Authority:** A new passenger watchdog will form as part of plans for GBR to hold the new organisation to account and will be given the "power to require service improvement plans, inspect the performance of GBR and assess performance against published data"
- **HS2:** Decisions will have to be made on tunnelling through to Euston from Old Oak Common and possible alternatives for a Birmingham - Manchester rail link will have to be formulated to avoid capacity issues on the West Coast Main Line
- **Long-term Transport Strategy:** Something promised in the Labour Party manifesto and reinforced with the announcement of a National Transport Strategy, though no clear timelines have yet been given on when such a strategy will be undertaken and implemented.

### The Chancellor's Speech on Public Spending Inheritance

- In a speech in the House of Commons in July.24, the Chancellor highlighted a series of unfunded commitments made by the previous Conservative Government, leaving a real fiscal hole of over £20bn this financial year.
- Measures were implemented, with immediate cuts to the current year budget reaching £5.5 bn, set to increase to £8.1 bn next year. Cuts included various transport projects, including the Restoring Our Railways scheme, saving £85m, the A303 Stonehenge Tunnel, and the A27 Arundel Bypass, all of which the Government argue were completely unfunded.
- As well as this, there are a further £1bn of transport projects committed to next year, which the Government says are "unfunded". A

full transport review is now being undertaken by the Transport Secretary to assess the funding viability of all projects. The Chancellor has launched a comprehensive spend to set Departmental budgets for the next 3 years, to conclude in Spring.25.

### What will this mean for London & South?

- Labour's policy pledges might cause some conflict with the interests of its newer voters. The party has ambitious plans for planning reform, highlighted in a significant speech by Deputy Prime Minister Angela Rayner. Traditionally Conservative-voting seats, however, may oppose major infrastructure and housing developments in their localities and could express their discontent to their new Labour MPs. It remains to be seen whether these MPs, caught between party policies and voter preferences, will abandon the Government's planning goals in favour of supporting their constituents in the next election.
- The Liberal Democrats will see a huge opportunity to solidify their wins across London & South. We are likely to see them look to challenge Labour on their plans for development and growth, in order to position themselves as the main opposition party in areas of London & South in council and other elections.
- The Conservatives will have to rethink their offer to large swathes of the area, to rebuild the trust and support they so dramatically lost. The direction that a new leader takes them on key issues around housing, transport and infrastructure will determine how successful they are likely to be.





## PRIORITY 2:

### Securing Investment

#### Purpose:

*This priority has two targeted goals:*

- Enable the securing of investment in rail infrastructure in London & South to meet the transport needs of the growing population. Unlock 3rd party investment opportunities from pension funds and institutional capital – identify a committed pipeline of investment throughout CP7 and develop a long-term integrated strategy for London & South.
- Secure the investment that is needed in London & South. Identify a pipeline of committed and potential rail investment opportunities and needs in the region. Understand the investment opportunities, especially those that could be delivered through third party investment. Connect potential investors with the opportunities.

#### Priority themes:

Third party investment and multi-agency funding  
Funding opportunities  
Pipeline transparency

#### What we have learned:

- Developed a list of stakeholder and budget holders in the region.
- Engaged with Department for Transport, Network Rail, Transport for London (TfL) and the Infrastructure Forum to gauge a clearer understanding of their priorities.
- Joint working with the High Speed Rail Group and Business LDN on opportunities around HS2.
- Collated initial pipeline information and received commitment for sharing of current and future pipelines from key regional industry stakeholders and contractors, including SRE and TfL.
- RIA will be represented at a senior roundtable with government officials on private investment in rail later in September.

#### What we have learned:

- It is a challenging time across the industry for funding, coupled with a need to improve performance for customers and enhance asset reliability and resilience.
- Some excellent work has been done to produce long term strategies, but long-term funding commitments are required to enable them to progress.
- Procurement strategies and mechanisms vary significantly between organisations – wide scope of coverage required by supply chain.
- It's becoming more difficult for SMEs to source and secure work.
- There are some great programmes of work identified in the region by TfL, SRE, etc. but currently very few of the projects included in these programmes are fully funded or suitably scoped.
- There is significant interest from clients in third party investment opportunities particularly in the L&S region and this will only increase in the coming years.

#### What we plan to do next / want to see:

We will arrange to receive updates from each of the key client and governmental bodies, so we can help the supply chain to be better informed, so that businesses can understand potential areas for investment and opportunities for innovation development and deployment.

Work with the RIA team to make sure that RIA members can access the latest funding and pipeline information for London & South along with links to tendering portals and third-party information.

Arrange a Lessons Learned and Benchmarking Workshop to identify what has worked and what hasn't worked in private markets and other industries and sectors (i.e. utilities and international).

Arrange a Challenge Workshop to discuss risk and regulation to understand what is blocking investment and how best to ROI.

## PRIORITY 3:

### Building stronger client and supplier relationships

#### Purpose:

Provide a trusted platform for engagement that fosters a shared understanding of the problems both suppliers and clients experience, and the opportunities from engaging differently, throughout the whole project life cycle.

#### Priority themes:

Stakeholder engagement  
Collaboration  
Knowledge sharing

#### What we have done:

- Engaged with members across the region to understand the current state of client – supplier engagement.
- Organised procurement and commercial contracting forums and discussions to understand where clients in the region (specifically NR Southern and TfL) are doing well or could improve.
- Produced a report with sixteen different recommendations which was used to engage with senior decision makers within client organisations.
- Held follow-up workshops to re-engage with members to understand whether there had been any further changes in their experiences.

#### What we have learned:

- Clients have welcomed the opportunity to hear and engage with our feedback and are interested in how they can include it in future procurement.
- Stakeholders are aligned in their willingness to work together to foster more collaboration and closer relationships between clients and the supply chain.
- Continued and persistent communication from clients is key to continued development of client-supplier relationships.
- Some good work has been done already by client organisations to produce engagement strategies that will be implemented over the coming years.
- High levels of staff turnover at client companies has impacted supply chain engagement.

#### What we plan to do next / want to see:

Arrange specific London & South "meet the buyer" events between Tier 1 suppliers and potential sub-suppliers and seek commitment for frequent engagement.

Establish relationships with academia to explore the subject of collaboration further. Arrange speaker events to update members on progress and develop a series of case studies outlining the benefits of client-supplier relationships.

Invite RIA members to provide feedback to relevant industry stakeholders, helping improve supply chain engagement and drive value for money and innovation.

Publish thought leadership content showcasing examples of good and innovative best practice by member companies and clients. Highlight the 'wins' so others can learn from and implement similar approaches.

Develop the Client Procurement & Commercial Contracting paper further and continue to engage with clients to agree on a coordinated approach to procurement.

## Engagement with Key Stakeholders

### Transport for London

**(TfL):** are a local government body responsible for most of the transport network in London. TfL's role is to implement the Mayor's transport strategy and manage transport services across the capital, for which the Mayor has responsibility. It is directed by a management board whose members are chosen for their understanding of transport matters and appointed by the Mayor of London. TfL's Commissioner and chief officers are responsible and accountable for the day-to-day operations of the organisation. TfL manages London's buses, London Underground, Docklands Light Railway, London Overground and London Trams. It also runs London River Services, Victoria Coach Station and the congestion charge scheme.



be worth up to £9bn. This alliance, known as Southern Integrated Delivery (SID), forms part of a new enterprise model – the Southern Renewals Enterprise.

**Key Procurement Lead(s):** SID Director, Ecosystem Director.

**High Speed 1 (HS1):** owns, operates and maintains the UK's only high-speed railway, as well as the stations along the route: St Pancras International, Stratford International, Ebbsfleet International and Ashford International. It is a 109km rail line that stretches between St Pancras International in London and the Channel Tunnel and allows for maximum speeds of up to 300kph for international services and 230kph for domestic services. The train companies currently operating on HS1 are Eurostar, who operate the international train services to Europe and South Eastern Railway, who operate domestic services to Kent. Freight operator, East Midlands Railway and Thameslink are also serviced by HS1. Their strategy is based on protecting what they have, whilst enhancing how they do things and growing their business.



### Network Rail Southern (NR Southern):

is the owner and operator of the majority of national railway infrastructure in the region. It has a remit to ensure safe and effective management and development of that infrastructure. NR Southern carried c.6,500 passengers in 2023 and maintain 3,300 track miles, 4,966 bridges, 895 level crossings, and around 8,000 signals. Its enhancement budget has seen a significant decrease in CP7 from over £1bn in CP6 while the renewals work now sits with the Southern Renewals Enterprise.



**Key Procurement Lead(s):** Capital Commercial Director, Capital Delivery Director.

### Southern Renewals Partnership (SRE):

went live at the start of CP7 with the aim of making a transformational change in how renewals work is delivered, by merging the capabilities of Network Rail and its supply chain to develop an integrated and coordinated approach to delivery. As part of the SRE four partners were selected to join Network Rail's Works Delivery team and have formed an innovative, performance-based alliance to deliver the Southern Region's renewals portfolio over the next ten years, estimated to



### Transport for South East

**(TfSE):** was established in 2017 to determine what transport infrastructure needs were required to boost the region's economy. They comprise sixteen local authorities, five local enterprise partnerships plus representatives of district and borough authorities, protected landscapes and national delivery agencies. Their purpose is to ensure that funding and strategy decisions are informed by local knowledge and priorities while their aim is to act as a statutory body with powers drawn down from central government rather than up from local government. Their Transport Strategy and Strategic Investment Plan set out their vision for a better connected, more prosperous and more sustainable region.



### Department of Transport

**(DfT):** work with agencies and partners to support continued management of the transport network. In doing so they help the UK's businesses and get people and goods travelling around the country. They also plan and invest in transport infrastructure to keep the UK on the move.



## Our thanks to the contributors and members of RIA London & South Leadership Group:

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