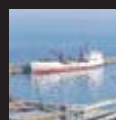
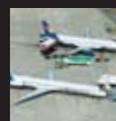


Transport links and the economy



Local and regional priorities of
economic development officers



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Foreword

by
John Maxwell, AA Director General
and
Adair Turner, CBI Director General



John Maxwell



Adair Turner

Transport links are a vital factor in the economic well-being of an area, taking goods to market, people to work and bringing visitors to spend. What has been less clear until now is how important transport links are: what inward investors look for, what current transport needs there are, how these issues vary in different regions of the country, and how they relate to the national economy and various industries.

Local authority economic development officers are uniquely placed to answer many of these questions. In this study they tell us what they believe will improve transport planning and economic development in their areas.

The study shows just how big a contribution officers believe that transport makes and the concerns about the present effectiveness of transport policy and provision. It reflects concerns from business as it fights to be competitive, from commuters and people who travel as part of their work, and from those who make leisure trips.

The research also suggests that unnecessary and damaging waste of resources and time is caused to industry and individuals because the transport infrastructure lets them down.

The AA and CBI believe that the key reason for this state of affairs is the lack of resources made available for transport. We see clear priorities for investment, from both public and private investors:

- in improved construction and maintenance of the trunk road and local network;
- in improved public transport – for example, in strategic and urban rail links and in London Underground;
- in air and port investment at high priority locations;
- in increased R&D in intelligent transport systems.

The CBI has costed the total bill for these changes at more than £11 billion each year, of which just under £7 billion would be for road-related transport improvements.

Where is the money to come from?

One of the ironies of the current situation is that it is *already* being paid by road-users. They pay £20 billion more in fuel duty and other taxes each year than they receive in investment in roads infrastructure and in local buses and trains.

The argument is clear – it is time to reform the way that provision of the transport network is funded. In particular, there must be a closer link between the money raised from road-users and investment in a properly-integrated transport system, with a clear distinction between the taxes and charges levied on users. The resulting economic and environmental rewards will benefit us all.

Transport links and the economy

The role of economic development officers in most local authorities is to attract and retain inward investment in their area. They therefore have insight into what industry and commerce look for when making investment decisions, and have an understanding of the link between transport and economic growth.

In April 1997 economic development officers in 441 local authorities in England, Scotland and Wales were asked to take part in a survey¹ that sought their views on transport links and the economy of their local area, and to provide information about:

- what they believe investors look for when choosing where to locate
- how important transport links are
- which transport links need improving and who will benefit from improvements
- what the transport issues are in their area and further afield



Local and regional transport concerns - the response

242 (55 per cent) responded. The detailed findings are outlined on the pages that follow, in aggregated form for Britain on pages 4 and 5, and then in detail for each of the Confederation of British Industry regions. In summary:

- in every region employment and the economy are more important as an issue now than they were five years ago
- traffic congestion and the need to improve major roads and access to motorways are seen as the major transport and travel problems facing employers
- poor public transport and traffic congestion are perceived to be the major transport and travel problems faced by employees, followed (some way behind) by the availability or the cost of parking, long journey times and travel problems associated with being in a rural area



¹ The study was conducted by AA Group Public Policy, working with the Industrial Policy Group of the Confederation of British Industry. The survey was carried out by Quest Analysis. Assistance was also provided by the CBI regional offices, the Local Government Association, the British Road Federation, AA Group Marketing Services and AA Public Relations.



- inward investors look first and foremost for a suitable site, a skilled workforce and good transport links; being close to suppliers and customers is less important and the availability of set-up grants is the least important factor in most regions
- transport links are important for all industries, but especially for distribution, manufacturing and tourism
- there is a need to improve transport links, notably rail and road - this will benefit both freight and passengers
- responsibility for improving transport links lies with central government, local authorities and the private sector in varying degrees, dependent upon whether it is a rail, road, air or port link

- in those parts of the country where there is strong economic performance and concentrations of industry or commerce and heavy traffic, economic development officers are more likely to stress the need for an integrated transport strategy along with measures to protect the environment; in these areas there is a stronger belief that a balance must be achieved between local business, the economy and other needs
- in the more remote areas there is generally greater support for provision of new transport infrastructure and concern that without it the local economy will suffer
- on average, transport and travel issues occupy about 10 per cent of the workload time of economic development officers, with some spending almost twice as much time on these issues



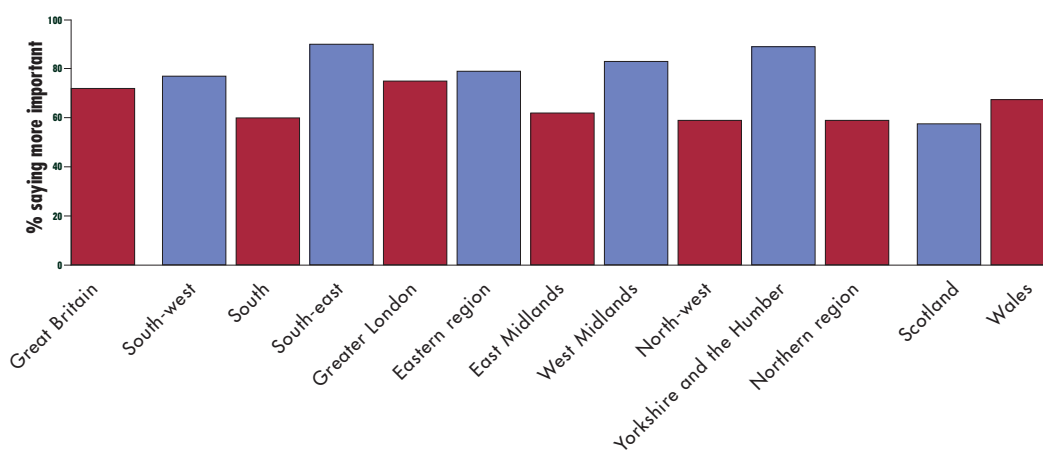
Concerns further afield - key links

The economic development officers also listed those parts of the transport network further afield that caused problems. Those transport links mentioned most often were:

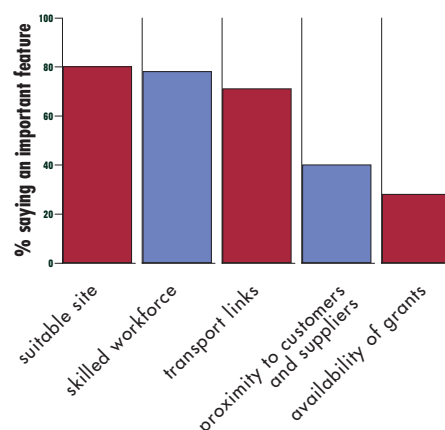
- the M25, especially by those economic development officers in Scotland, the Eastern region, throughout London, the South-east, and the South
- the M6 and M5 around Birmingham, by those in Scotland, the North-west, North and Wales
- the A1, over most of its length, by those in East Midlands, the Eastern region, Scotland, and Yorkshire and the Humber
- the whole of the West Coast main (rail) line, by all those in regions lying adjacent to it
- rail links to the Channel Tunnel, by those in the Eastern region, East Midlands, North-west, and North
- better rail access to Heathrow Airport, by those in London, the South-east and South-west
- rail links across London for both passengers and freight, by those in the East and East Midlands
- freight and passenger rail links to London, by those in the South-west and West Midlands

What local authority economic development officers say about their areas

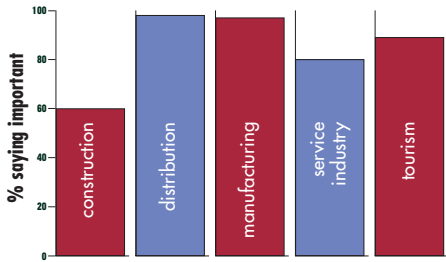
Employment and the economy rates as more important alongside other issues now, compared with five years ago



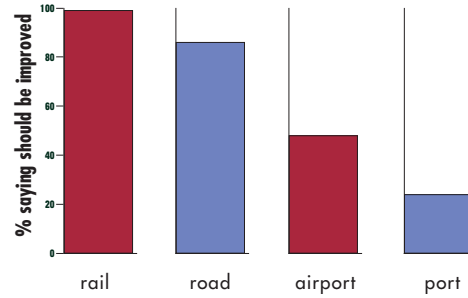
Inward investors to their area want a suitable site, skilled workforce and transport links when choosing where to locate



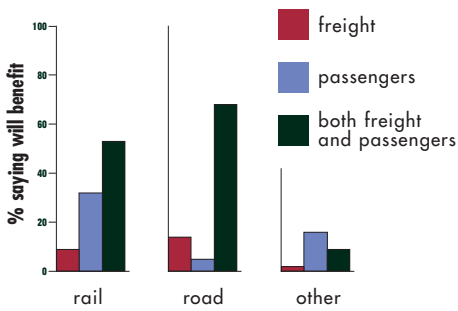
Transport links are important to the main economic sectors in their area



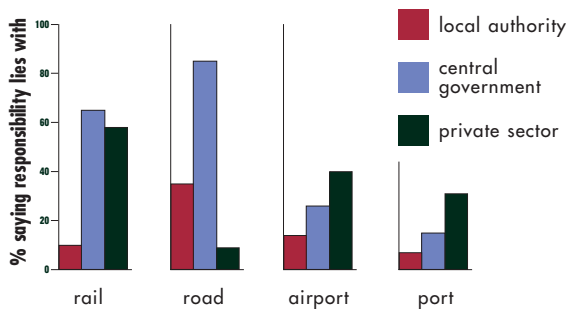
Transport links need to be improved



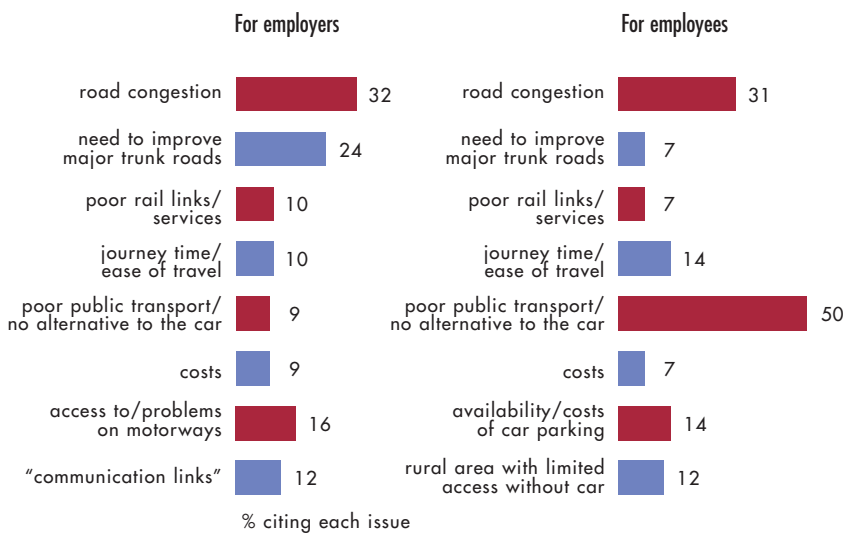
Improved transport links will benefit freight, passengers or both groups



Transport link improvements are a shared responsibility



The main travel and transport issues



Road infrastructure changes



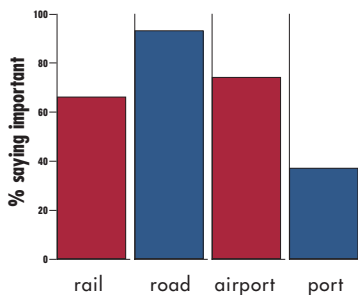
South-west

Within the South-west

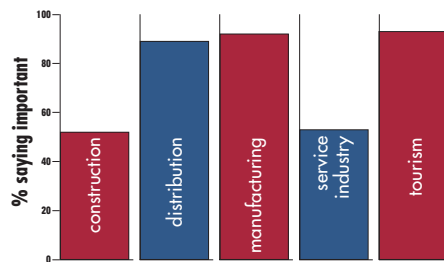
- the South-west stretches from Gloucester, Swindon and Bournemouth, down through Bristol, Wiltshire and Dorset and the peninsula to Devon and Cornwall. It includes major cities such as Bristol, Exeter and Plymouth, and many other cities and large county towns
- there are many rural areas where transport links are important, notably for tourism and agriculture. The main rail links include part of the route between South Wales and London and the cross-country route from Birmingham to Penzance. Major motorways include the M4 and M5
- many car-borne visitors, especially in the summer, mean that there are particular problems at peak times both on and off the main road networks and bottlenecks around many towns and attractions

What economic development officers working in the South-west say about transport links

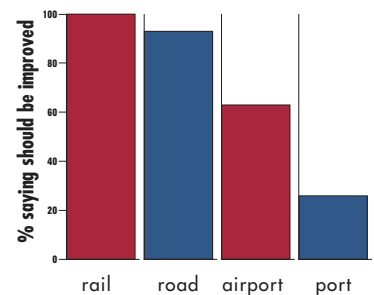
Important in attracting and retaining inward investment



Important for the main economic sectors

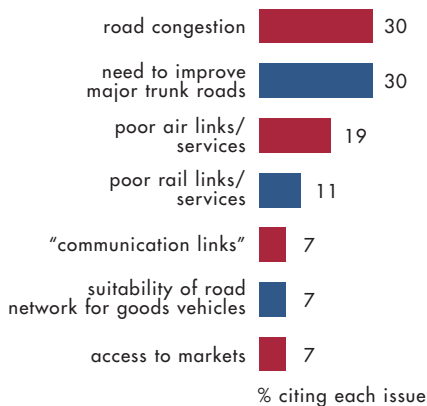


Need to be improved

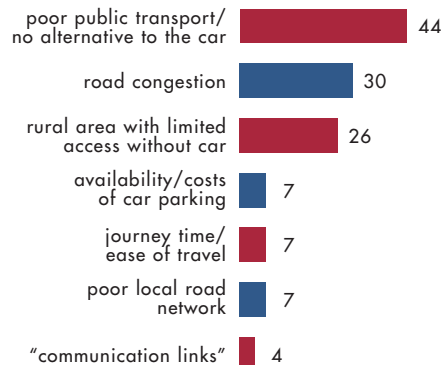


The main travel and transport issues

For employers



For employees



Road infrastructure changes

	Necessary	Acceptable to local business
traffic restriction	70	52
widen existing trunk roads	48	70
widen existing motorways	15	26
construct new roads	33	59

% saying necessary or acceptable



Cornwall – tourism in the summer causes the traffic to grow

The South-west's economic development officers say that¹

- a skilled workforce is a crucial factor in attracting inward investors
- transport links are of above-average importance to tourism
- there is above-average need to improve road and airport links
- rail improvements are likely to benefit passengers rather than freight
- congestion (often seasonally-related) is a much greater concern for both employers and employees than the average

¹ An issue is listed if there is substantial variation in the responses to the issue between regions and the matter is rated by the region's economic development officers highly compared with the national average

Comments

“ Increasingly, the business community locally, although it would like to see a better road infrastructure, is coming to terms with the reality that it won't happen ”

“ Our rural area does not want large multi-national inward investors. Prefer 10 small companies with 10-50 people ”

“ The economic performance of cities and of their businesses will increasingly depend on our ability to ensure that cities continue to function and attract investment ”

Improvements in the South-west wanted by economic development officers

- | working in the South-west | working elsewhere |
|--|--|
| ● electrification of the main rail links, better links to London, improved frequency and speed generally | ● improvements to the M5 around Bristol and links from it to Taunton to reduce summer delays |
| ● better links on branch lines to main rail links | ● a motorway route into Cornwall |
| ● general improvements to the M5, A30, A38, A350, A31 and A303 | ● better routes to Poole and around Salisbury |
| ● improvements to the port at Plymouth and to other smaller ports | ● a south coast road route, better links to London and to the Channel Tunnel |
| ● development of regional airports at Bristol, Plymouth and Exeter | |

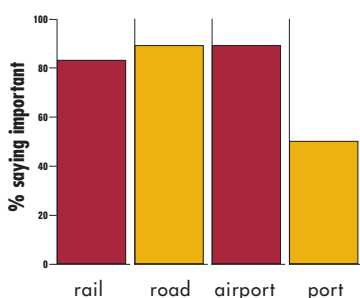
South

Within the South

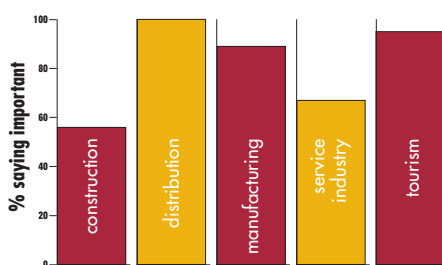
- the “South” includes the counties of Berkshire, Buckinghamshire, Hampshire, Isle of White and Oxfordshire. These are predominantly rural areas but include major cities such as Oxford, Reading, Portsmouth and Southampton
- there is a mix of industry, including activities associated with the ports, and much employment in newer technologies. The Reading-Slough corridor, in particular, has been one of the fastest growing areas in recent times
- tourism is important in many areas, notably on the coast, in the New Forest, in the very rural counties and in the county towns. The routes to and from the coast are important for tourism and for industry, and all are gateways to mainland Europe

What economic development officers working in the South say about transport links

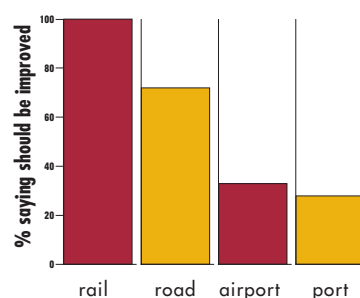
Important in attracting and retaining inward investment



Important for the main economic sectors



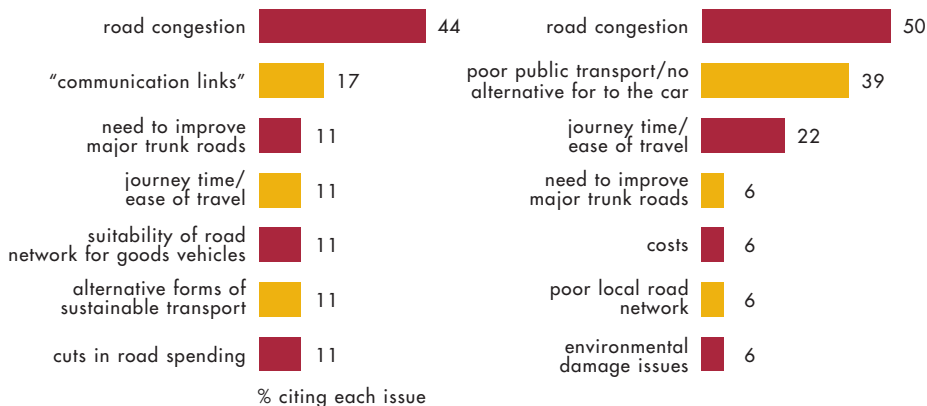
Need to be improved



The main travel and transport issues

For employers

For employees



Road infrastructure changes

	Necessary	Acceptable to local business
traffic restriction	83	56
widen existing trunk roads	22	61
widen existing motorways	6	44
construct new roads	28	50

% saying necessary or acceptable



The M25 is important for the region, throughout the country and for London

The South's economic development officers say that¹

- traffic congestion is a major problem for both employers and employees
- transport links are of above-average importance to tourism
- there is strong support for traffic restraint or restrictive traffic management

Comments

“ ...quality of life and environmental considerations tend to be balanced against the constraining need for all types of investment ”

“ We need to make better use of public transport and of integrated transport systems with sensible costs to encourage people to use them ”

“ Business community requests a more certain transport framework to enable investment decisions ”

Improvements in the South wanted by economic development officers

working in the South

- direct rail links to Heathrow Airport and better links from Heathrow across London. Improved rail links to the ports of Portsmouth and Southampton
- improved frequency, cleanliness, reliability of passenger services
- improvements to north-south roads generally, improved road-rail interchanges, public transport packages, better links to motorways, widening of the M27
- improvements at Heathrow Airport, but only partial support for Terminal 5

working elsewhere

- A34 Newbury bypass the most often cited improvement for the region; improvements to the M25, M4, and M40
- improved accessibility to Heathrow
- better information, and integration of passenger services, by rail

¹ See footnote on page 7

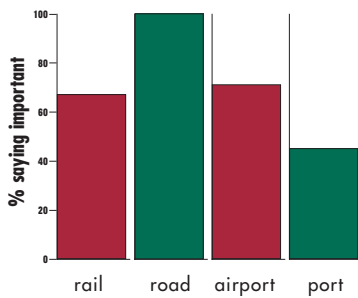
South-east

Within the South-east

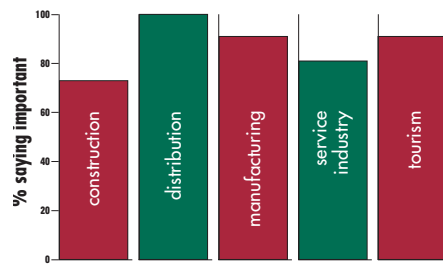
- East and West Sussex, Kent and Surrey form the CBI South-east region in what is traditionally one of the most prosperous regions of Britain
- the South-east is the principal gateway to mainland Europe through ports and, more recently, the Channel Tunnel. Much of the road freight from mainland Europe travels through the South-east
- there is a large amount of daily commuting to London. Rail and road communications are generally good on routes to and from central London but poor along and parallel to the coast

What economic development officers working in the South-east say about transport links

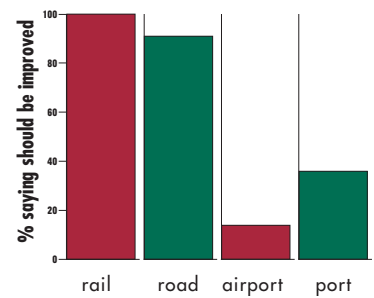
Important in attracting and retaining inward investment



Important for the main economic sectors

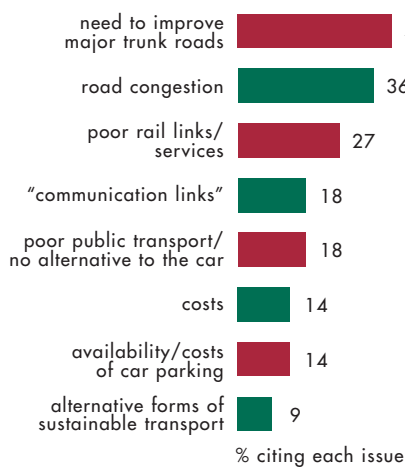


Need to be improved

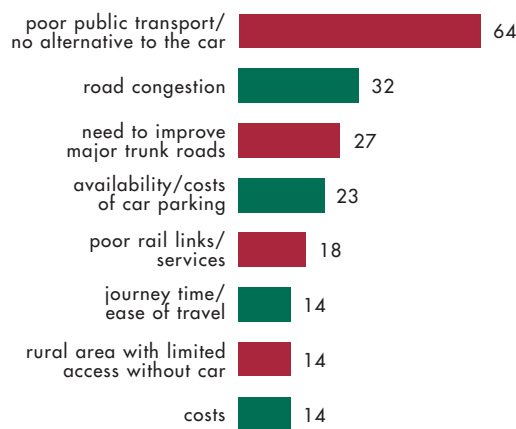


The main travel and transport issues

For employers



For employees



Road infrastructure changes

	Necessary	Acceptable to local business
traffic restriction	59	36
widen existing trunk roads	59	73
widen existing motorways	14	27
construct new roads	41	64

% saying necessary or acceptable



Transport links to the ports and Channel Tunnel are crucial

The South-east's economic development officers say that¹

- employment and the economy is much more of an issue than five years ago
- the need for improved trunk roads is very high
- public transport and rail links for employees are some of the least satisfactory
- transport links are especially important for inward investors
- proximity to suppliers and customers is especially important to inward investors
- transport links are of above-average importance to the construction and tourism industries
- there is above-average support for improving road links and ports
- rail improvement is likely to benefit passengers rather than freight

¹ See footnote on page 7

Comments

“ ...the resident and business communities recognise the need for improving mobility and accessibility, balanced with the need to improve the local environment ”

“ ...there is a need for changes in attitudes to transport and emerging issues like company transport plans ”

“ Most complaints from business relate to the problems of local traffic... ”

Improvements in the South-east wanted by economic development officers

working in the South-east

- improved rail links and journey times on trips into London and along the south coast
- improved road links along the south coast, notably the A27 (but also linking to the A259 and A20)
- better access to urban areas and relief of the M25 in these areas
- trunk road upgrading
- port improvements, notably at Newhaven

working elsewhere

- improvements to the M2/A2 and the M3/M25
- north-south road links
- rail links to the Channel Tunnel and Heathrow Airport
- rail links to other parts of the UK avoiding London

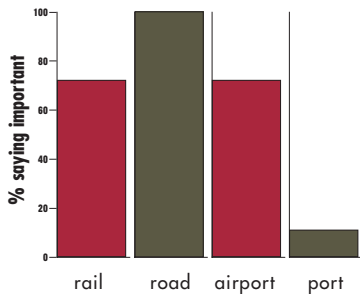
Greater London

Within Greater London

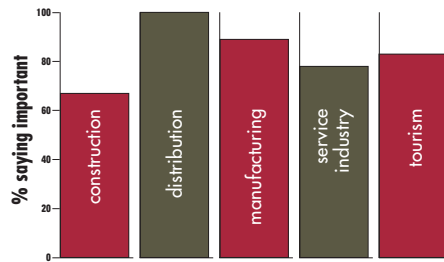
- London is a world-class capital, with the concentration of population, commerce, business, tourism and service industries that go with this. It provides employment for 3.7 million people and there are more than 400 million UK resident day visits each year
- in movement and population terms, London is comprised of more than 30 small towns – a central core, 7 inner boroughs, a ring of about 8 boroughs beyond this, and a remaining 17 outer boroughs that have many of the characteristics of the suburbs of other cities
- the necklace of the M25, lying just outside London, but serving movement around the capital, is, in parts, the busiest motorway in Europe. Motorways and rail links to most major cities in London radiate from London

What economic development officers working in Greater London say about transport links

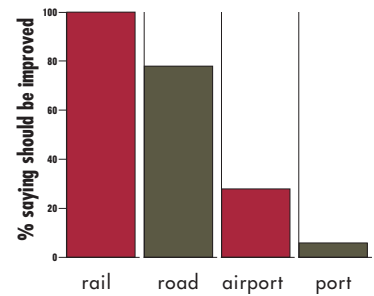
Important in attracting and retaining inward investment



Important for the main economic sectors

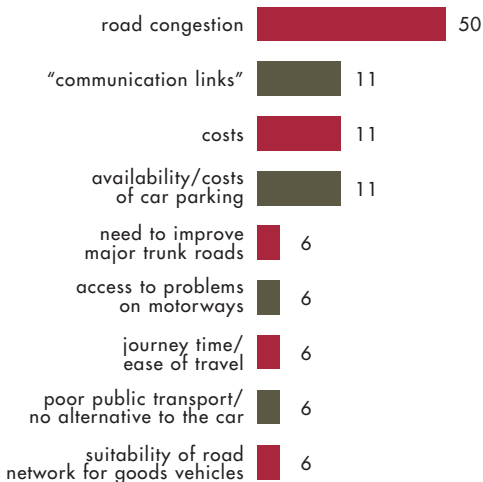


Need to be improved

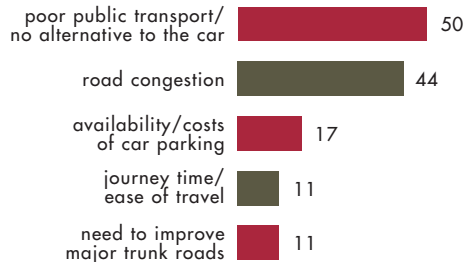


The main travel and transport issues

For employers



For employees



% citing each issue

Road infrastructure changes

	Necessary	Acceptable to local business
traffic restriction	89	56
widen existing trunk roads	11	28
widen existing motorways ¹	0	11
construct new roads	17	39

% saying necessary or acceptable
1 Excludes M25



London traffic is a problem for employers and employees alike

Greater London's economic development officers say that¹

- they spend about 20 per cent of their time on transport issues – twice as much as the average
- traffic congestion is a major problem for both employers and employees
- transport links are of above-average importance to attracting inward investment
- traffic restraint or restrictive traffic management are more likely to be necessary and acceptable than elsewhere
- rail improvement is more likely to benefit passengers rather than freight

Comments

“ Mobility per se is not the prime issue - accessibility is ”

“ Rail has a limited role to play in freight transport, but this role should be increased ”

“ ...road congestion is threatening to strangle industry and commerce.

New road building is not an alternative. Only radical improvements to public transport and restraint of the car have any hope of success ”

“ ...the object in transport planning needs to be to remove traffic that does not really need to be on the roads, ease conditions for those for whom other modes of transport are impractical, and whose journeys are essential ”

Improvements in Greater London wanted by economic development officers

working in Greater London

- development of the Underground system
- better links across London for passengers and freight
- better east-west road links across the conurbation; improved traffic management package solutions
- another Thames crossing; rail, motorway and motorway link completion in east London

working elsewhere

- improvements linking to, or on, the M25, M1, M11, M4
- better road and rail access to Heathrow Airport and the Channel ports
- more Thames crossings
- better public transport especially on orbital routes within inner London
- improvements to the West Coast main line, the North London line and links to East Anglia

¹ See footnote on page 7

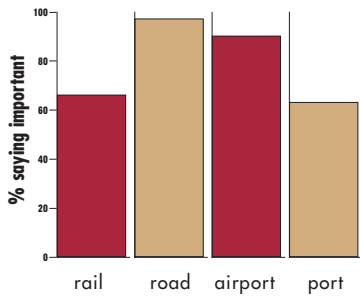
Eastern region

Within the Eastern region

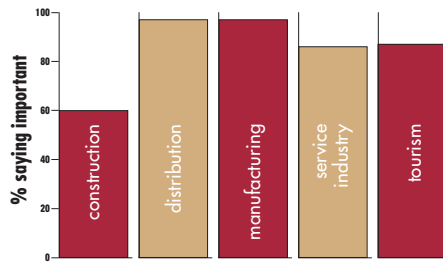
- those counties in close proximity to London – Bedfordshire, Essex and Hertfordshire – have a broad employment base that includes high technology for aircraft and aerospace, plastics, pharmaceuticals, manufacturing – notably the motor industry – and mineral extraction
- Further from London there is more emphasis on the service sector, tourism, agriculture and fisheries and coastal activities (eg, Cambridgeshire and Norfolk). Suffolk (and Essex) are major gateway counties to and from mainland Europe – their ports have good links to other parts of the country
- those counties nearest to London carry large amounts of through traffic (and many commuters) on motorways orbiting, or radiating from, London. Rail links are predominantly to and from London. The remote areas of East Anglia are generally reliant on single carriageway roads

What economic development officers working in the Eastern region say about transport links

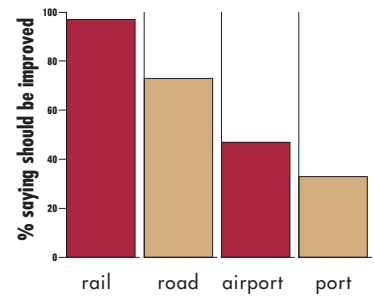
Important in attracting and retaining inward investment



Important for the main economic sectors

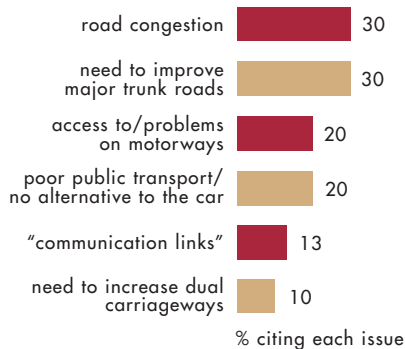


Need to be improved

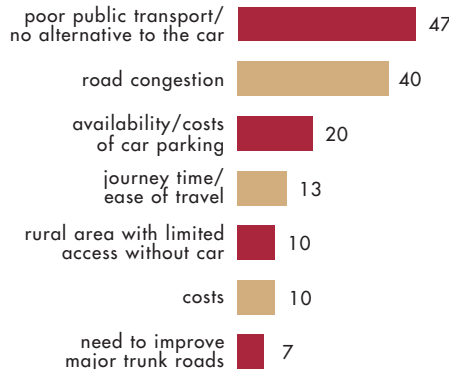


The main travel and transport issues

For employers



For employees



Road infrastructure changes

	Necessary	Acceptable to local business
traffic restriction	57	43
widen existing trunk roads	57	70
widen existing motorways	17	43
construct new roads	20	57

% saying necessary or acceptable



Felixstowe docks – one of many ports where development is needed

Eastern region economic development officers say that¹

- transport links are of higher than average importance to service industries
- there is above-average support for port links to be improved

Comments

“ ...need to balance mobility with the need to protect the environment ...a freeze on road building will disadvantage areas lacking adequate road infrastructure and this could deter business ”

“ ...without good road transport there is no business. ...business people here live locally... [and just want] more effective transport – staff must drive... as there is no credible alternative... ”

“ ...great concern... that the road programme has been halted before the provision of a basic trunk road network. Other regions have motorways and we still haven't got dual carriageways ”

Improvements in the Eastern region wanted by economic development officers

working in the Eastern region

- rail – east-west rail links; better links to London; construction of road-rail freight depots at Felixstowe and other ports; Thameslink 2000 and better Channel Tunnel links
- upgrading of the A11, A12, A14 and A47, and many other single to dual carriageways; better road links from Great Yarmouth and Lowestoft
- developments of the ports of Great Yarmouth, Felixstowe, Lowestoft and Boston sea lock, and of the airports at Stansted, Luton, Norwich, Southend and in south Suffolk

working elsewhere

- improvements to the A11, A12, A47; selected by-passes (eg, Baldock); better access from the direction of the M25 and Heathrow Airport
- rail – more frequent rail services to Cambridge and Peterborough; better links westbound from Norwich and Peterborough and improved services from Fenchurch Street station
- improved through-London links

¹ See footnote on page 7

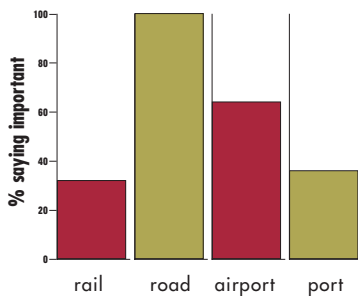
East Midlands

Within the East Midlands

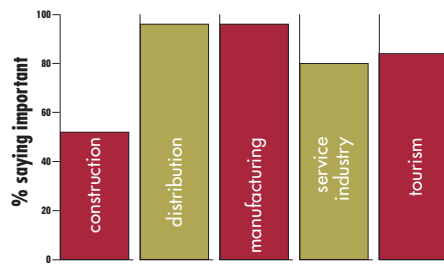
- Derbyshire, Nottinghamshire, Lincolnshire, Leicestershire and Northamptonshire have a diverse geography – from parts of the Peak District to the Lincolnshire Wolds – and great variety in industry and commerce
- the region's economy is dominated by manufacturing – notably textiles and clothing and food, drink and tobacco. It also has a particularly strong small and medium-sized company sector
- the region is served well by the M1 in a north-south direction; there is good east-west linkage via the M6 in the south (but not the north) of the region. Rail links from Derby, Leicester and Nottingham south are satisfactory, but less good than on the East Coast main line

What economic development officers working in the East Midlands say about transport links

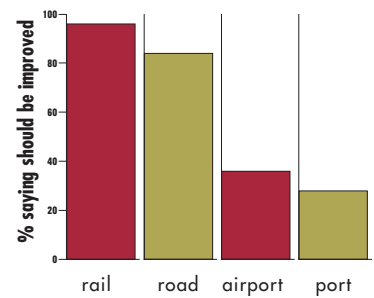
Important in attracting and retaining inward investment



Important for the main economic sectors

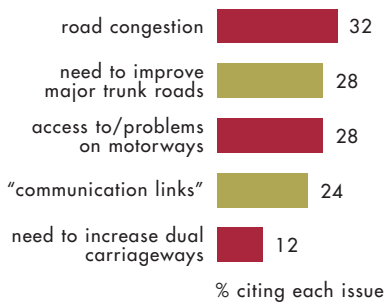


Need to be improved

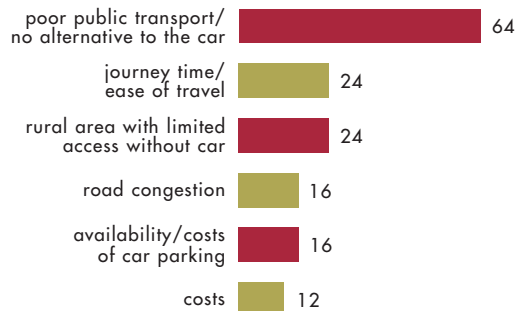


The main travel and transport issues

For employers



For employees



Road infrastructure changes

	Necessary	Acceptable to local business
traffic restriction	72	24
widen existing trunk roads	56	68
widen existing motorways	12	48
construct new roads	68	80

% saying necessary or acceptable



Nottingham – one of several busy centres in the west of the region

East Midlands' economic development officers say that¹

- poor public transport and rail services are a problem facing employees
- there is above-average support for building new roads

Comments

“ Investment in new road infrastructure should be highly focused and limited to help deal with localised congestion and environmental concerns ”

“ [This area] is remote in transport terms. There is scope for considerable improvement in road and rail transportation ”

“ If road improvements helped “direct” inward investment or economic development, this would help economic growth to be dispersed [away from “hotspots”] ”

Improvements in the East Midlands wanted by economic development officers

working in the East Midlands

- rail – better and more passenger services; better rolling stock
- better and more flexible freight services, with electrification and upgrading of the Midland main line
- road – by-passes for various medium-sizes towns in Derbyshire; better east-west routes A1-M1 and M1-M6; dualling of the A43, A46 and A17
- generally – better links to Boston and Humber ports; development of East Midlands airport; better access to the Channel Tunnel

working elsewhere

- upgrade A1 to motorway standard and reinstate plans for M11 extension; upgrade the M1, notably at junctions 23, 28, 29 and 30; upgrade A16, A17, A18, A46
- improvements of links to east coast ports, including Felixstowe, and on cross-Thames and Channel Tunnel rail links
- rail links between east and west coast ports (eg, Haven ports to Holyhead) improve access to Manchester and the North-west

¹ See footnote on page 7

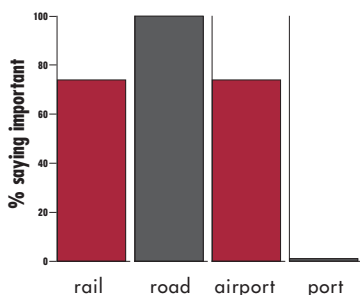
West Midlands

Within the West Midlands

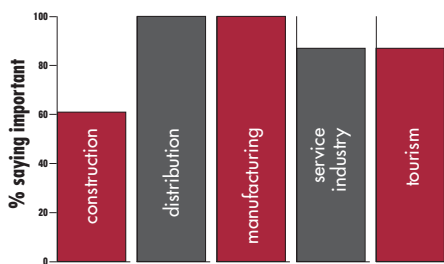
- Coventry and Birmingham, Dudley, Sandwell, Walsall and Wolverhampton (and Solihull, a comparatively rural exception) form one of the densest urban areas outside London. Shropshire, Staffordshire, Hereford and Worcester and Warwickshire are relatively rural
- in the conurbations, metal products and manufacturing, mechanical engineering, the motor industry and support industries have long been an important source of employment and wealth. There have been substantial increases recently in the electronics, plastics and materials industries and in business and financial services
- North-south transport links are served by the M6 and M5 motorways (and by the M1 just outside the region) and the West Coast main line. East-west communications are not as good, although the M42 and A34 provide important links

What economic development officers working in the West Midlands say about transport links

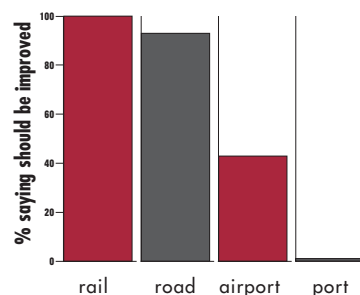
Important in attracting and retaining inward investment



Important for the main economic sectors

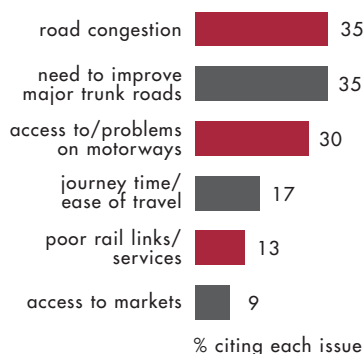


Need to be improved

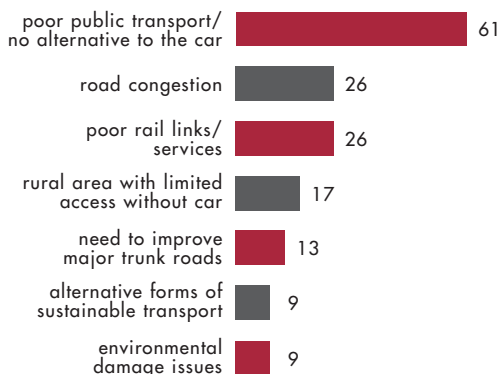


The main travel and transport issues

For employers



For employees



Road infrastructure changes

	Necessary	Acceptable to local business
traffic restriction	61	35
widen existing trunk roads	43	57
widen existing motorways	35	57
construct new roads	43	61

% saying necessary or acceptable



Flowing freely here, but congestion around Birmingham is a concern as far away as Scotland and South Wales

Comments

West Midlands' economic development officers say that¹

- poor access to motorway links is a problem for employers
- poor public transport and rail services is a problem for employees
- proximity to suppliers and customers are viewed as especially important when choosing where to locate
- transport links are of higher than average importance to service industries
- there is stronger support than in most other regions for improvements to road links and for motorway widening

“ Transport links are a vital issue in industrial relocation considerations...”

“ Investment in transport infrastructure focuses on regional centres...”

“ ...transport such as walking cycling and trams may help relieve the congestion on roads that affect business ”

Improvements in the West Midlands wanted by economic development officers

working in the West Midlands

- congestion relief on the M5 and M6 and better access to and from the north of the conurbation (of which the Birmingham Northern Relief Road (BNRR) will be part)
- upgrading the West Coast main line; links from Shrewsbury to the Inter-City network; better freight facilities
- better public transport in metropolitan areas; more investment in local stations; upgrading the trunk road network

working elsewhere

- improvements to the M5/M6 junction and to the M6/M42/M5 links
- construction of the BNRR
- Channel Tunnel rail links
- improved national freight links
- links to the West Coast main line

¹ See footnote on page 7

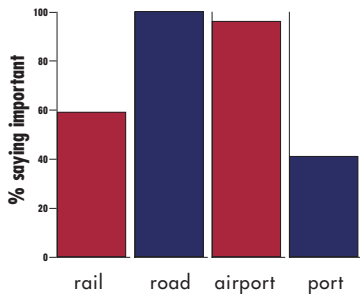
North-west

Within the North-west

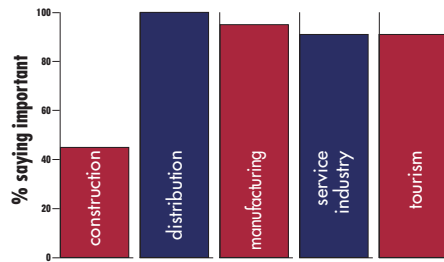
- Lancashire, Cheshire, Greater Manchester, Merseyside and the High Peak of Derbyshire have many major industries, including computing, telecommunications, chemicals and pharmaceuticals. The defence and textile industries, although contracting recently, also figure
- this is a diverse region both geographically and economically, with pockets of less affluent areas and wide variation in employment rates. There is strong competition between the major ports and airports in the region for market share
- transport links are reasonably strong, with a good motorway network in place, although parts of this need completing or widening. Links away from the region are less good – to the south because of road congestion and to the east because of physical and environmental constraints

What economic development officers working in the North-west say about transport links

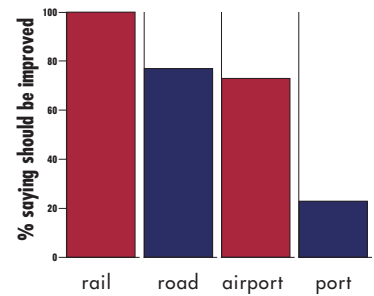
Important in attracting and retaining inward investment



Important for the main economic sectors

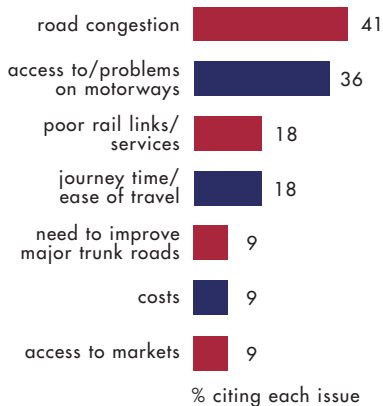


Need to be improved

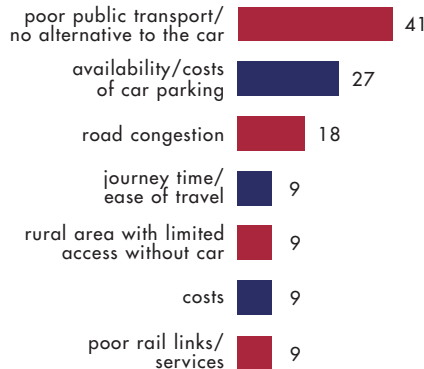


The main travel and transport issues

For employers



For employees



Road infrastructure changes

	Necessary	Acceptable to local business
traffic restriction	13	27
widen existing trunk roads	41	64
widen existing motorways	32	59
construct new roads	50	68

% saying necessary or acceptable



Public transport is satisfactory in Manchester and the major towns and cities but not as good elsewhere

The North-west's economic development officers say that¹

- poor links with or access to motorways is an above-average concern for employers
- availability of grants is a relatively important factor in attracting and retaining inward investment
- transport links are of above-average importance to the service and tourism industries
- there is strong support for improving airport links and for motorway widening

Comments

“ The North-west’s transport links... have suffered from chronic under-investment in recent years... the region is now being seriously affected, as are efforts to attract inward investment ”

“ Traffic congestion and heavy goods vehicles in residential/urban areas is a focus of political and community concern. If the issue is not tackled it will become a brake on economic growth ”

“ Longer-term solutions need to be addressed. A comprehensive approach encompassing all forms of travel is required ”

Improvements in the North-west wanted by economic development officers

- | working in the North-west | working elsewhere |
|--|--|
| ● public transport – upgrading of the West Coast Main Line; upgrading of rolling stock, sub-regional links and those in urban areas; integrated public transport | ● rail links to the Channel Tunnel |
| ● improvement of links to the east coast; better cross-Pennine links | ● improvements to the West Coast main line; better rail connections to Scotland |
| ● completion/ widening of the Greater Manchester orbital motorway – M62, M63, M66; more town by-passes | ● improved trans-Pennine rail and road routes to Sheffield |
| ● additional (western) crossing of the Mersey; better access to Liverpool city centre | ● improvements to the M6 to and from Birmingham |
| | ● development of the airports at Manchester and Liverpool; a second runway at Manchester |

¹ See footnote on page 7

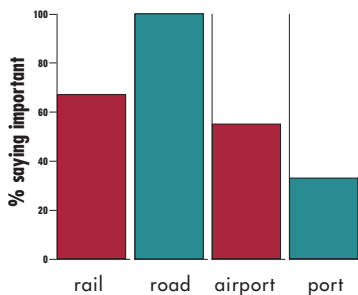
Yorkshire and the Humber

Within Yorkshire and the Humber

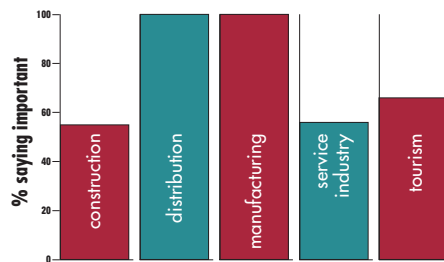
- Yorkshire and the Humber stretches from the Pennines to the east coast. It includes the West Yorkshire conurbation of Bradford and Leeds, the industrial areas based on, and to the north east of, Sheffield, and the Humber ports of Grimsby, Immingham, Hull and Goole
- the region has had traditional strengths in mining, metals, mechanical engineering, textiles and fuel processing, but most of these are in decline and the region is generally under-represented in newer industries such as electrical and electronic engineering and plastics
- the M1 provides good north-south road links in the west of the region and the M62 provides similarly good east-west links. Road links are less good away from these motorways. Rail links south from Leeds, Doncaster and York are strong, but less good from Sheffield

What economic development officers working in Yorkshire and the Humber say about transport links

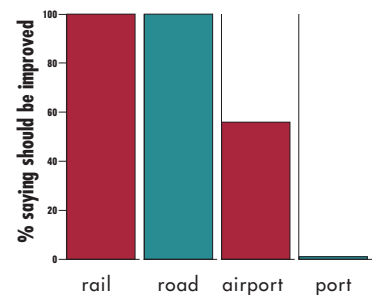
Important in attracting and retaining inward investment



Important for the main economic sectors

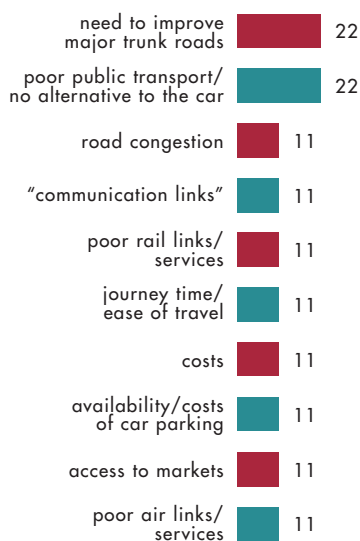


Need to be improved



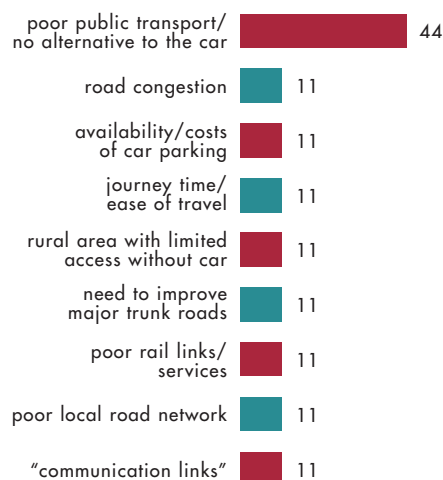
The main travel and transport issues

For employers



% citing each issue

For employees



Road infrastructure changes

	Necessary	Acceptable to local business
traffic restriction	44	44
widen existing trunk roads	67	78
widen existing motorways	44	56
construct new roads	56	67

% saying necessary or acceptable



Leaving Leeds – some electrification is already in place, but more is called for

Yorkshire and the Humber’s economic development officers say that¹

- the economy and employment is of above-average importance as an issue compared with five years ago
- transport links are of above-average importance in attracting and retaining inward investors
- there is above-average support for road links to be improved
- there is above-average support both for building new roads and for road widening

Comments

- “ The shelving of the A1 improvements has had serious implications. Changes to access arrangements that were proposed would have had significant beneficial effect... ”*
- “ Cuts to county highways budgets for the next winter are extremely worrying ”*
- “ The mechanism and procedures [for funding] need amending ”*

Improvements in Yorkshire and the Humber wanted by economic development officers

- | working in Yorkshire and the Humber | working elsewhere |
|---|---|
| ● improved access to Europe for freight | ● A1 upgrading and improvement |
| ● better connections to Manchester Airport and other links to the west | ● better rail infrastructure to improve the quality of service for passengers and freight |
| ● further electrification; more and better local rail lines; improved bus services and rail-bus links | ● direct rail services and links to the Channel Tunnel |
| ● A1 and M18 upgrading; improvements to the A64 and A66 | |
| ● more direct flights to Europe, notably from Leeds & Bradford Airport | |

¹ See footnote on page 7

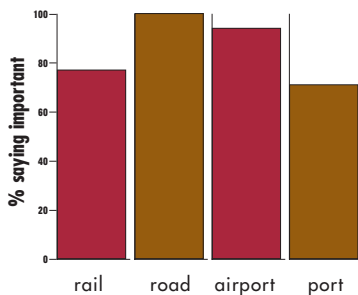
Northern region

Within the Northern region

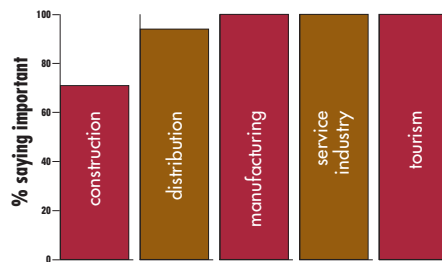
- Cumbria, Northumberland, Tyne and Wear, Durham and Cleveland include some of the most popular rural attractions in the country. The region also includes large industrial centres such as these on the rivers Tees, Tyne, and Wear and county towns such as Carlisle and Durham
- the region's industrial strengths in engineering and chemicals continue to develop successfully, compensating in part for the decline in the shipbuilding and coal mining industries
- the main population centre in the east of the region is not connected to the UK motorway network and there are concerns that the region's major trunk roads should be improved or upgraded, particularly because few of the region's customers lie within the region

What economic development officers working in the Northern region say about transport links

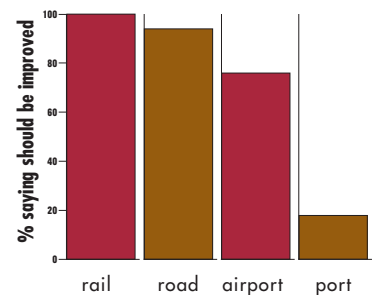
Important in attracting and retaining inward investment



Important for the main economic sectors

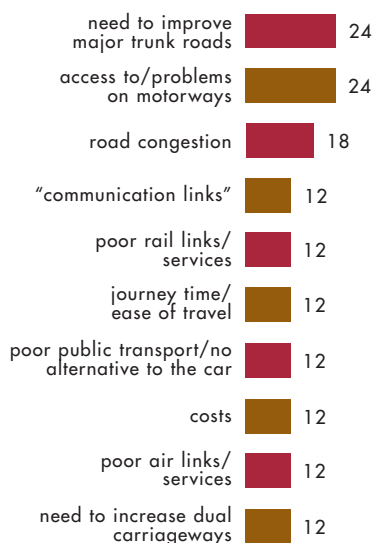


Need to be improved

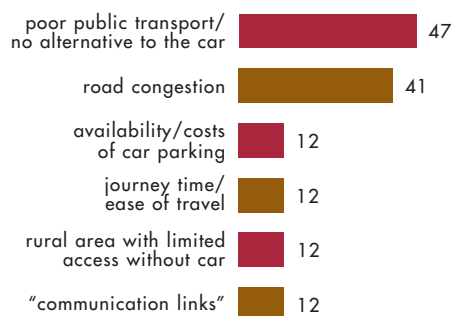


The main travel and transport issues

For employers



For employees



% citing each issue

Road infrastructure changes

	Necessary	Acceptable to local business
traffic restriction	53	12
widen existing trunk roads	88	88
widen existing motorways	41	41
construct new roads	35	47

% saying necessary or acceptable



Sunderland – better rail links to the East Coast main line required

The Northern region's economic development officers say that¹

- both a skilled workforce and availability of grants are of above-average importance in attracting and retaining inward investment
- transport links in the region are of above-average importance to the construction, service and tourism industries
- there is above-average support for road and airport links to be improved
- there is above-average support for motorway widening

Comments

“ There are specific transport links in this area that need improvement – particularly road accesses to industrial areas...”

“ ...the A1 is an essential lifeline ”

“ The economic impact of transport is not restricted to the business community. The wishes of residents and tourists need to be considered in the development of any transport policy ”

“ ...tackle the issue of congestion... [by] encouraging home working and local recruitment schemes...”

Improvements in the Northern region wanted by economic development officers

- | working in the Northern region | working elsewhere |
|---|---|
| ● rail freight heads at strategic locations and better freight access | ● by-passes around congestion in Newcastle, Middlesborough, Darlington, Teesside |
| ● upgrading of the West Coast main line; better links to the Channel Tunnel | ● improvements to the A1 |
| ● improved speed and frequency and facilities for local rail services | ● another Tyne road crossing |
| ● upgrading of the A1 to motorway standard or dual carriageway | ● rail links by-passing London to the Channel Tunnel |
| ● improvements to the A69, A66, A590, A595 and selected by-passes | ● better links to the East Coast main line from Hartlepool, Middlesborough, Saltburn and Sunderland |

¹ See footnote on page 7

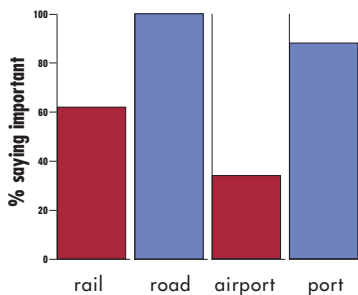
Scotland

Within Scotland

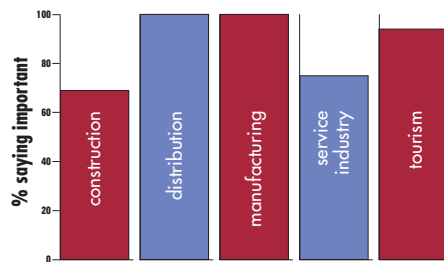
- there are heavy concentrations of population, industry and commerce in the central belt between Glasgow and Edinburgh where urban problems such as congestion, especially during peak periods, and public transport provision are issues
- because a small part of the transport network is heavily used by many of Scotland's traditional and high-tech businesses, working population and visitors, internal links are important, as are links to sea and airports; in more remote areas there is concern about travel costs and a need for new infrastructure
- transport links with the rest of the UK are important, much of Scotland's exported road freight being carried on one road – the M74/A74

What economic development officers working in Scotland say about transport links

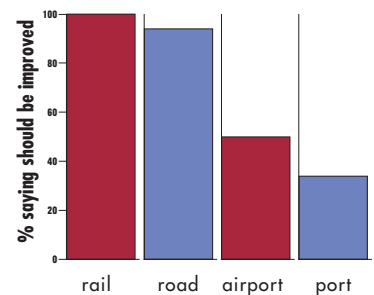
Important in attracting and retaining inward investment



Important for the main economic sectors

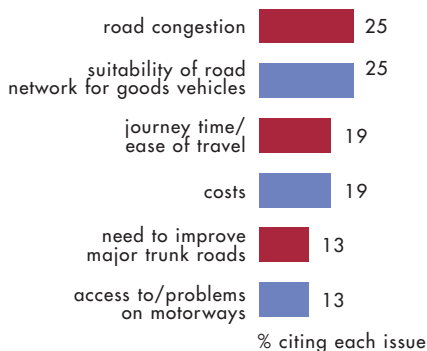


Need to be improved

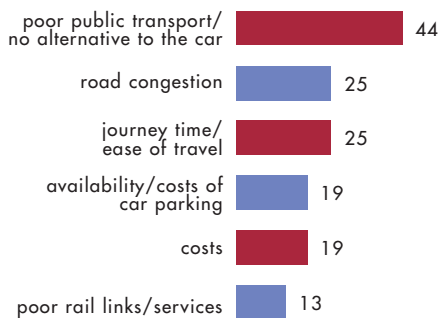


The main travel and transport issues

For employers



For employees



Road infrastructure changes

	Necessary	Acceptable to local business
traffic restriction	63	56
widen existing trunk roads	56	56
widen existing motorways	13	25
construct new roads	63	56

% saying necessary or acceptable



Transport and travel issues in Glasgow are similar to those in many other major British cities

Scotland's economic development officers say that¹

- a skilled workforce and availability of grants are of above-average importance as factors for inward investors
- transport links are of above-average importance to the construction and tourism industries
- there is above-average support for road links and ports to be improved
- there is a greater feeling than elsewhere that local authorities should be more involved in road improvements
- there is more support than elsewhere for private sector involvement in rail improvement
- support for new road building is stronger than elsewhere

Comments

“ We need better integration of transport and planning policies linked to realistic levels of funding ”

“ [There are problems with] the availability of fuel at economic prices in rural areas ”

“ ...transport policy needs to be based on a holistic, integrated approach rather than individual schemes being justified in isolation ”

Improvements in Scotland wanted by economic development officers²

- | in their area | beyond their local area |
|--|--|
| ● lower rail costs | ● West Coast main line upgrading |
| ● better commuter and suburban rail services | ● completion of the motorway network – M74 northern completion, M74/M6 (Carlisle to Scottish border), M8 and M80 |
| ● dualling of many sections of trunk roads | ● public transport links to airports |
| ● transport packages in key areas | ● transport packages in key areas |
| ● completion of the motorway network | ● West coast ferry links |

² Only economic development officers working in Scotland listed changes in Scotland

¹ See footnote on page 7

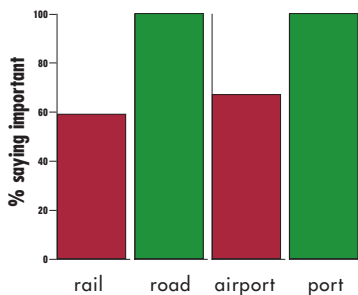
Wales

Within Wales

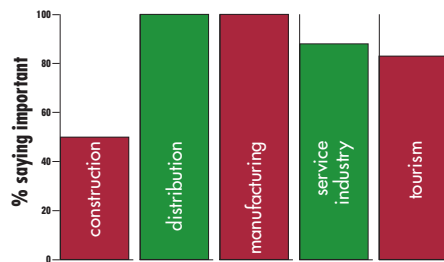
- Wales has seen extensive restructuring of its industries over the last decade or so, with a move to lighter manufacturing and to services. Tourism and agriculture are important, notably in the north, west and central areas
- the greatest concentration of industry and commerce in Wales is in the south, in the strip adjacent to the coast from Newport and through Cardiff to Swansea. In North Wales there are also concentrations of industry around Wrexham and part of the coastal strip
- in both the extreme north and south of the country there are reasonably good east-west transport links by road and rail but these are not as good away from the main network. East-west transport links in mid-Wales are not as good and north-south links throughout the country are notoriously poor

What economic development officers working in Wales say about transport links

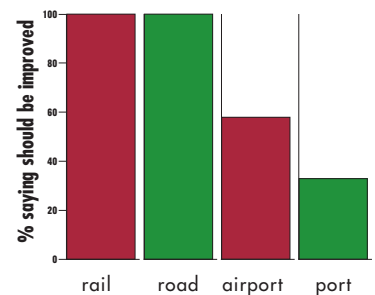
Important in attracting and retaining inward investment



Important for the main economic sectors

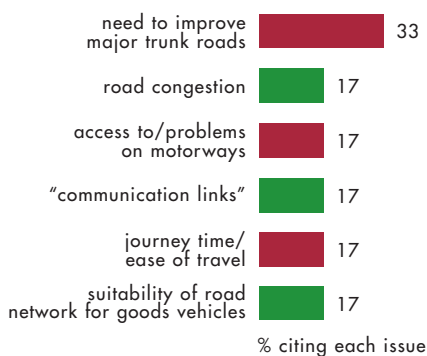


Need to be improved

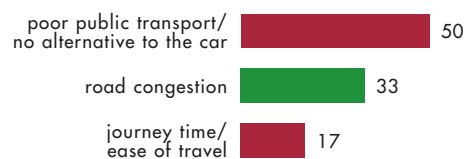


The main travel and transport issues

For employers



For employees



Road infrastructure changes

	Necessary	Acceptable to local business
traffic restriction	33	33
widen existing trunk roads	58	67
widen existing motorways	8	25
construct new roads	50	67

% saying necessary or acceptable



Terence Soames Photographic

Cardiff Airport – increasingly important, but improvements needed

Economic development officers in Wales say that¹

- there is above-average support for road links and ports to be improved in order to attract and retain inward investment
- there will be benefit to freight transport in road and rail link improvement
- motorway widening is less of a priority than elsewhere

Comments

“ The long term aim must be to get more business off the roads and onto rail ”

“ The major problem for this area is the toll charges on the Severn Bridge. They are the single biggest concern for both existing and inward investing organisations ”

“ We’re a long way from most of the UK road network here and need to make sure that business can get to and use what links we do have with it ”

Improvements in Wales wanted by economic development officers

working in Wales

- better rail links to the Channel Tunnel
- improvements to the Swansea-to-London rail line and to the North Wales (Chester to Holyhead) coast line
- removal of Severn Bridge tolls
- improvements to the A465 (Heads of the Valleys road), better access to the M4, completion of links to Holyhead, and improved key north-south routes
- access and general improvements at ports
- improvements to Cardiff Airport

working elsewhere

- improvements to the capacity of the M4
- better links to the M54, M5 and M6 and to the West Coast main line rail services

¹ See footnote on page 7



“ The economic performance of cities and of their businesses will increasingly depend on our ability to ensure that cities continue to function and attract investment ”

“ ...the resident and business communities recognise the need for improving mobility and accessibility, balanced with the need to improve the local environment ”

“ ...without good road transport there is no business. ...business people here live locally... [and just want] more effective transport – staff must drive... as there is no credible alternative... ”

“ [This area] is remote in transport terms. There is scope for considerable improvement in road and rail transportation ”

“ Transport links are a vital issue in industrial relocation considerations... ”

“ The mechanism and procedures [for funding] need amending ”

“ ...there is a need for changes in attitudes to transport and emerging issues like company transport plans ”

“ ...transport policy needs to be based on a holistic, integrated approach rather than individual schemes being justified in isolation ”

“ We're a long way from most of the UK road network here and need to make sure that business can get to and use what links we do have with it ”

£10.00

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