

# Bakerloo line Upgrade (BLU) – delivery strategy

22 March 2024

1. Context and purpose of update
2. Process and engagement
3. Summary of shortlisted options
4. Views from leadership teams, project assurance and IIPAG
5. Endorsement and next steps



Summary slide  
Agenda item: Bakerloo line Upgrade  
Title: Bakerloo line Upgrade Delivery Strategy  
Date of meeting: 22 March 2024  
Executive Committee  
lead/paper owner: Stuart Harvey/Alex Williams

# Summary

These slides summarise the appraisal of delivery options for the Bakerloo line Upgrade [redacted]

The underlying assumption in all options is that the [redacted] is exercised by [redacted]

[redacted]

Subject to [redacted] will enable a single option recommendation to ExCo by May 2024.

**DECISION** Endorsement to drop the traditional option from the process and refine the [redacted] for a recommendation by May 2024

## CONTEXT

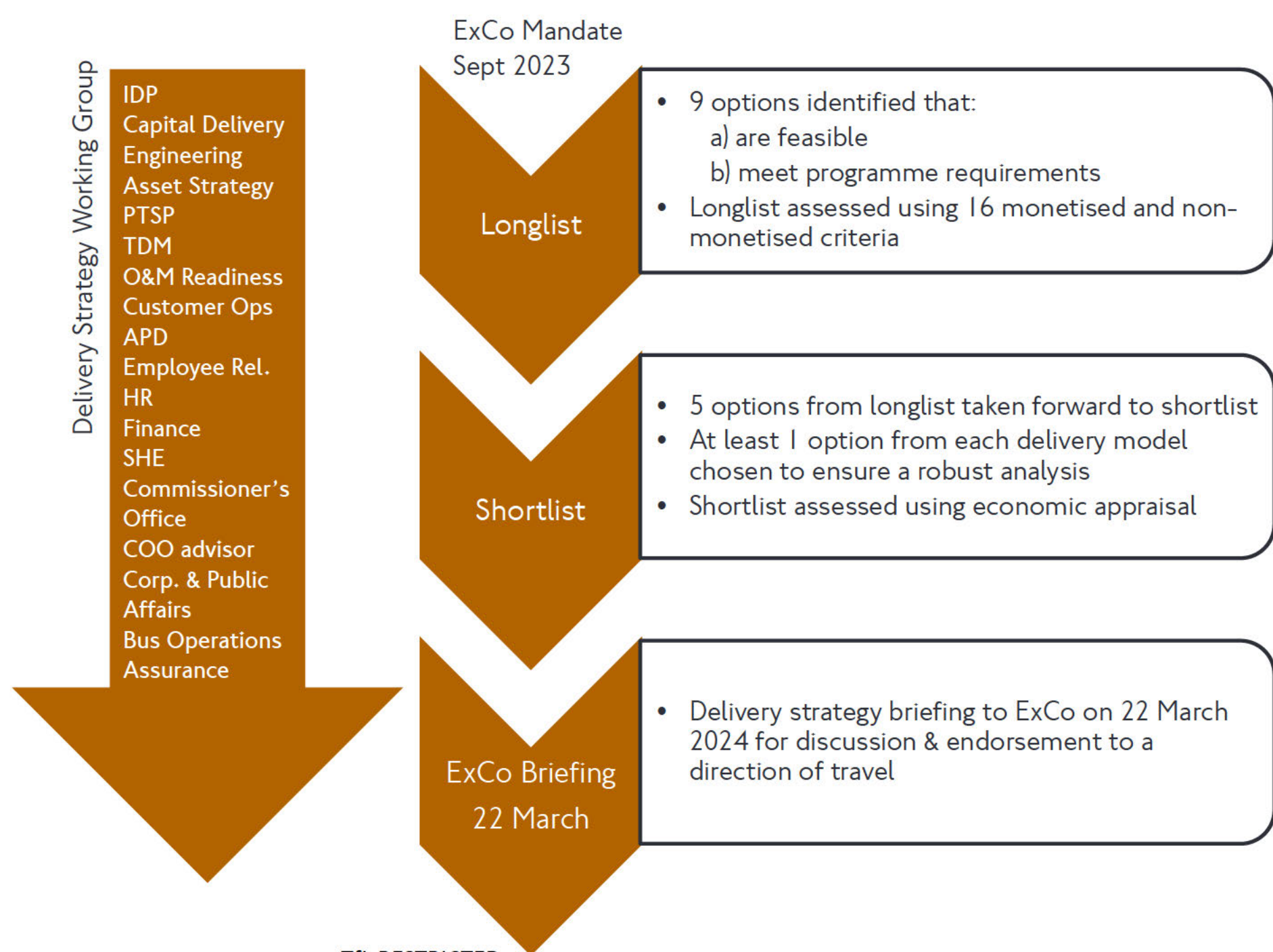
- In Autumn 2023 ExCo set the challenge to think beyond a traditional delivery approach [REDACTED]
- Crucial to the early feasibility stages of the programme and with excellent engagement across the TfL value chain, we have assessed different delivery options for the infrastructure and depot workstreams to enable a new fleet of trains to be brought into maintenance and operation [REDACTED]
- [REDACTED]
- [REDACTED]
- Subject to that endorsement, [REDACTED] will be undertaken over the next 1-2 months to assess [REDACTED] in more detail ahead of returning to ExCo for a decision.
- A decision on the delivery strategy is critical to our efforts to realign the infrastructure and rolling stock programmes. Without a decision, the programme will not be able to advance with key activities including business case development and market engagement for the infrastructure.
- It is also important that the business remains committed to this decision [REDACTED] as changes to the delivery strategy will add significant costs and risk to the programme [REDACTED]
- A new depot facility at Stonebridge Park, or at another location, isn't the determining factor [REDACTED], however other options away from Stonebridge Park should continue to be pursued given the constraints of the current site.

## 2. Process and engagement

The development and appraisal of delivery options started in October 2023

Engagement has been via a Delivery Strategy Working Group which has met bi-weekly to agree the method and assess the options

A significant amount of engagement at a senior level has been undertaken prior to ExCo



# 3. Summary of shortlisted options



[Redacted text]

[Redacted text]

[Redacted text]

[Redacted text]

[Redacted text]

- o extremely difficult to deliver and adds significantly more cost due to programme
- o requires a prolonged and disruptive delivery schedule with reduced service for three years
- o dual running of [Redacted] and 72TS would require power upgrade as [Redacted]

[Redacted text]

- o offers reduced capex and delivery complexity; but passenger, reputational and political impacts are significant
- o brings significant impacts on staff and operations [Redacted]
- o additional (currently unknown) costs likely for regulatory & opportunity works [Redacted]

[Redacted text]

- o provides optimal balance between delivery and impacts on passengers (least cumulative impact on passengers)
- o brings [Redacted] into operation quickest and likely to provide closest synergies with [Redacted]
- o [Redacted] to enable fleet switchover, transition to new depot facilities and significant operational training

Further refinement [Redacted] will be undertaken over the next 1-2 months to assess the [Redacted] in more detail ahead of returning to ExCo for a decision.

# 3. Summary of shortlisted options

Three critical issues drive our need to identify a preferred option:

- 1) The current condition of the existing fleet (cost, performance and reliability)
- 2) [redacted] a cost-effective solution and offering fleet standardisation benefits
- 3) Providing sufficient time to develop our infrastructure and works programme and allowing sufficient time to plan for the impacts

## Impact on our Customers:

All delivery models have an impact on passengers, our modelling suggests there is sufficient line capacity on alternative routes but station level detail and mitigations (particularly buses) need to be looked at in more detail. In any scenario an earlier decision allows time to plan and procure mitigations, as well as developing a customer strategy and Travel Demand Management. Further work is also required as part of an Equalities Impact Assessment for any chosen scenario.

[redacted]

[redacted]

[redacted]

## Impact on our Stakeholders:

[redacted] will be subject to risk based on past and current experiences, [redacted]. It is therefore important that we take this decision with a robust evidence base and realism [redacted]. Noting that there is a long period of time before [redacted] future changes to the delivery strategy will add significant costs and risk to the programme, as well as impact our commercial position [redacted].

# 4. Views from leadership & assurance

Leadership teams recognised considerable engagement undertaken to consider a range of views and impacts as part of a structured options assessment

Broad endorsement of work undertaken and support for exploring more detail as the way forward

Specific areas identified for further work

Forum	Feedback	Action taken / planned
Capital	[Redacted]	[Redacted]
	Recommend engagement with supply chain to test delivery assumptions	[Redacted]
	How does this fit with business case?	<ul style="list-style-type: none"> <li>- Further sessions held with Investment Appraisal</li> <li>- Delivery strategy to be included in business case</li> </ul>
Operations	Impacts [Redacted] on alternative modes and lines / operational mitigations	<ul style="list-style-type: none"> <li>- See: <a href="#">Impact on Our Customers</a></li> <li>- Follow up session held with key stakeholders</li> <li>- More detailed modelling and mitigation planning</li> </ul>
	[Redacted]	[Redacted]
	[Redacted]	[Redacted]
	[Redacted]	[Redacted]
Customer & Strategy	Impact on Buses and early thinking on mitigations	- See: <a href="#">Passenger Impacts Modelling</a>
	What happens in [Redacted] service levels	- See: [Redacted]
	Who uses the line and impacts on different passenger groups?	<ul style="list-style-type: none"> <li>- To be addressed in EQIA in future</li> <li>- Customer Plan &amp; TDM to be developed</li> </ul>
Assurance & IIPAG	Good progress to realign programmes [Redacted] [Redacted] needs to be re-validated in business case	- Noted and planned to include in business case
	[Redacted] Recommend further economic analysis to show value for money	- Noted and planned to include in business case
	[Redacted]	<ul style="list-style-type: none"> <li>- [Redacted]</li> <li>- Continue business case discussions [Redacted]</li> <li>- Progress [Redacted] options &amp; further analysis</li> </ul>

# 5. Endorsement and next steps

[Redacted]

[Redacted]

[Redacted]

Further analysis is required to determine the optimal solution [Redacted]  
[Redacted]

The delivery team can then progress programme activity based on a single option, supported by early supply chain/market engagement.

This isn't an easy decision but a decision by May from ExCo is important as the project needs a basis for infrastructure programme planning, [Redacted] and our continuing engagement with the DfT on the business case.

[Redacted]

**DECISION** Endorsement to drop the traditional option from the process and refine the [Redacted] for a recommendation by May 2024