

London's forgotten highway

October 2006



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The Transport Committee

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The Transport Committee's general terms of reference are to examine and report on transport matters of importance to Greater London and the transport strategies, policies and actions of the Mayor, Transport for London, and the other Functional Bodies where appropriate. In particular, the Transport Committee is also required to examine and report to the Assembly from time to time on the Mayor's Transport Strategy, in particular its implementation and revision.

The terms of reference for this scrutiny were agreed by the Transport Committee on 8 June 2006:

- To examine current levels of passenger river services on the Thames, including frequency, destinations, costs and integration with other transport modes
- To examine the potential for improving and expanding the provision of river services through TfL, local authorities, developers and other private investors
- To examine the potential use of expanded river services during the Olympics

The Committee would welcome any feedback on this report. Please contact Bonnie Jones on 0207 983 4250 or via e-mail at bonnie.jones@london.gov.uk if you have any comments. For press queries, please contact Dana Gavin on 020 7983 4603 or via dana.gavin@london.gov.uk

Contents

Page

Rapporteur's foreword 3

Report

1. Introduction..... 4
2. Barriers to improving river transport 9
3. Marketing and creating demand 13
4. New schemes 16
5. Conclusions..... 21

Appendices

Appendix A – List of recommendations 23
Appendix B – List of evidence submitted to the Committee 24
Appendix C – Transport Strategy, 4M River Thames and other waterways 25
Appendix D – Routemap of Thames Clipper services..... 26
Appendix E – Excerpt from Greenwich LIP on river transport 27
Appendix F – Orders and translations..... 28
Appendix G – Principles of scrutiny 29

Rapporteur's Foreword

Angie Bray AM



The river Thames is and always has been central to the identity of London. From the London 2012 logo, to the *Eastenders* opening title sequence on T.V, the river is integral to the life of the city. Once a symbol of our industrial might and imperial reach, in recent times it came to represent our industrial decline, until new developments such as Canary Wharf, the 'Gherkin' and our very own City Hall once again renewed the river as a symbol of our economic revival and success.

The common perception when it comes to commuter river services is that they are an unaffordable luxury. The cynics maintain that the idea of viable commuter river services is nice in theory, but unworkable in fact. They recall that every previous attempt at a river service has failed, and this is true. However, commuter river services *do* exist in London, and they have much more potential than people think.

I set out with the intention of solving the enigma; is there a way to make commuter river services viable, without pouring in huge sums of public subsidy?

As is shown in the final report, I believe the answer to that question is yes. In fact, the solutions we found are relatively simple and straightforward. Firstly, the mindset needs to be addressed, and the Mayor and Transport for London need to re-assess the river's potential as a genuine reliever of congestion and an alternative, green form of transport. In short, this is a horse they should back.

Secondly, those in charge need to see the new opportunities becoming available to leverage in private finance, which is now more realistic given the rising number of mixed-use developments, continually changing the face of the riverbank. Indeed, as the report shows, developers with mixed-use sites see river services as a commercially viable, long-term interest. It has been recently announced that the owner of the Millenium Dome, Philip Anschutz has bought Thames Clippers, in a £15 million deal and that Lord Sterling, the former chairman of P&O is co-ordinating a drive to set up a regular service. These are prime examples of how viable the river is, and how seriously the private sector takes it.

And thirdly, the amount of public subsidy that would be required does not need to break the bank. Because river services need time to build up solid passenger numbers, the amounts of public money needed tend to start high, but go down year after year.

We have an exciting opportunity to add to the transport mix in London, and all that is needed is for the Mayor and TfL to show the requisite amount of will in order to bring all the above elements together. I hope this report lays to rest the perception that this cannot be done. It can.

1. Introduction

1.1 A brief history of river transport

- 1.1.1 The River Thames has been the catalyst for and witness to much of London's, and indeed Britain's history. The Romans were the first to recognise its importance as a strategic trading route, which reached its zenith at the height of the British Empire in the nineteenth century. The Thames was the largest port in the world, teeming with ships and boats bringing goods from all over the world. The River Thames is one of London's most famous and significant landmarks. And yet now it is relatively unused by Londoners themselves.
- 1.1.2 The river has diminished as a focal point for London as other transport routes, such as roads and railways were developed, and continued with the decline of the Thames as a major port and industrial centre. Whilst many of London's most recognisable landmarks line the banks of the river, use of the river itself is fairly limited to tourist boats, some freight and the occasional canoeist. It cuts through suburban areas, Whitehall, the City and the new financial hub of the Docklands, but use of the river by commuters has always been limited.

1.2 Previous attempts

- 1.2.1 It is perhaps surprising that there has never been a successful modern passenger transport system on the Thames¹. Several attempts at running a 'river bus' service have been made in the past, but all were unsuccessful. Passenger traffic on the Thames was popular in the 17th Century, but with the development of more bridges, roads and railway, it diminished. Steamboats flourished in the first half of the 19th Century, but by 1886, all companies had folded.



- 1.2.2 In 1905-7, a 30 boat London County Council fleet of penny steamers was launched, but it collapsed, losing over half a million pounds, a very considerable sum at the time. During the Festival of Britain in 1951, a consortium of owners launched a further service, which again collapsed once the South Bank site closed.



- 1.2.3 The RiverBus service, launched in 1988 was the tenth attempt since 1945 to run a commercially viable transport system on the Thames. It was designed to serve Chelsea Harbour and Canary Wharf and was funded by Olympia and York (the owners of Canary Wharf), other developers, the Department of Transport and the Department of Environment. Olympia and York went into administration in 1992, and the service was scrapped the next year. White Horse



¹ In Elizabethan times, river taxis were numerous and popular, Samuel Pepys being a frequent user

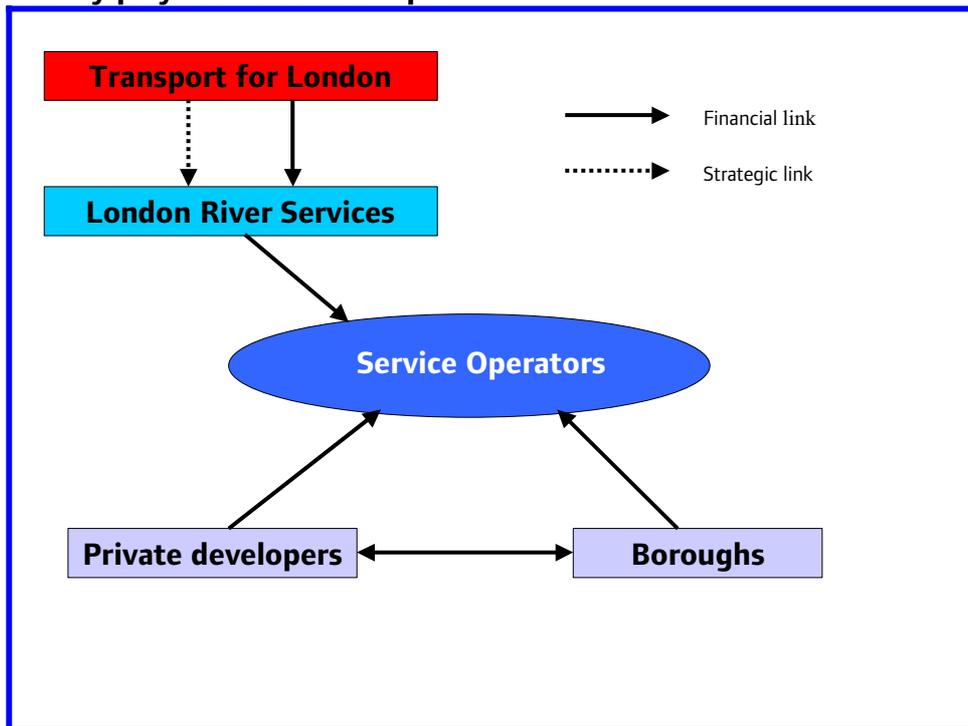
Fast Ferries, an established ferry operator was awarded a contract to serve the Millennium Dome in 2000 and to provide a legacy of high speed services, but again, it did not succeed.

1.2.4 These services failed for a multitude of reasons. The lack of a strategic body to coordinate transport, including ticketing, signage and information meant that it was very difficult to integrate services with other transport modes. Schemes were often launched during recessions which meant both funding and patronage were limited, and were often over-ambitious. Timetabling and boat design were poorly researched. There were insufficient riverside developments to ensure that passenger numbers were high enough for the services to succeed. A further factor was the fragmented ownership of piers, which caused difficulties in securing stops.

1.3 River services – how they are delivered today

1.3.1 London River Services is a subsidiary company of TfL, responsible for overseeing and regulating river services and managing and developing piers. It was originally created as part of London Transport in 1997 and was transferred to Transport for London in 2000 after the creation of the GLA. They do not operate any services directly.

Figure 1: Key players in river transport



1.3.2 The Transport Strategy sets out TfL's strategic direction for river services (the part that relates to passenger transport can be found in Appendix C). What is notable about the wording in the Strategy is how vague and unspecific it is. It contains phrases such as 'passenger services will be encouraged', and discusses 'options'

for development, which will be explored 'as soon as is practicable'². Looking at the Transport Strategy there appears to be a lack of direction and ideas from TfL on how to actually develop river transport. At this point, it is important to differentiate between TfL's role as a strategic, direction setting body, and LRS's role as an operational facilitator to carry out this plan.

1.3.3 Commuter services are operated by Thames Clippers (the operating name of Collins River Services Ltd), who are partially subsidised by TfL. The services operate as a 'riverbus', transporting passengers in high-speed vessels at 15-30 minute frequencies during peak times. Thames Executive Charters also operate a high speed service from Putney to Blackfriars (calling at Chelsea Harbour, Cadogan Pier and Embankment) at frequency of every 40 minutes in the morning peak and once an hour in the evening peak. We would support the expansion and upgrading of this service to operate at similar levels to the Thames Clipper service.

1.3.4 The Thames Clippers river bus service started in 1999, with an initial fleet of two boats. The service ran initially at a 40 minute frequency between Greenland Pier (Surrey Quays) stopping at Canary Wharf, London Bridge and Savoy (Embankment), carrying around 200 passengers daily. Thames Clipper then approached LRS for a subsidy to help expand the service. In 2003, LRS agreed to underwrite the existing services and capital costs (ie the boats). £3m was invested over 10 years, which allowed Thames Clippers to open several new services, including the 'Tate to Tate', Savoy to Masthouse Terrace and Hilton Docklands to Canary Wharf services. Today the services transport around 2500 passengers daily, with 524,700 passengers per year on the subsidised services³. A routemap of the current services operated by Thames Clippers can be found in Appendix D.

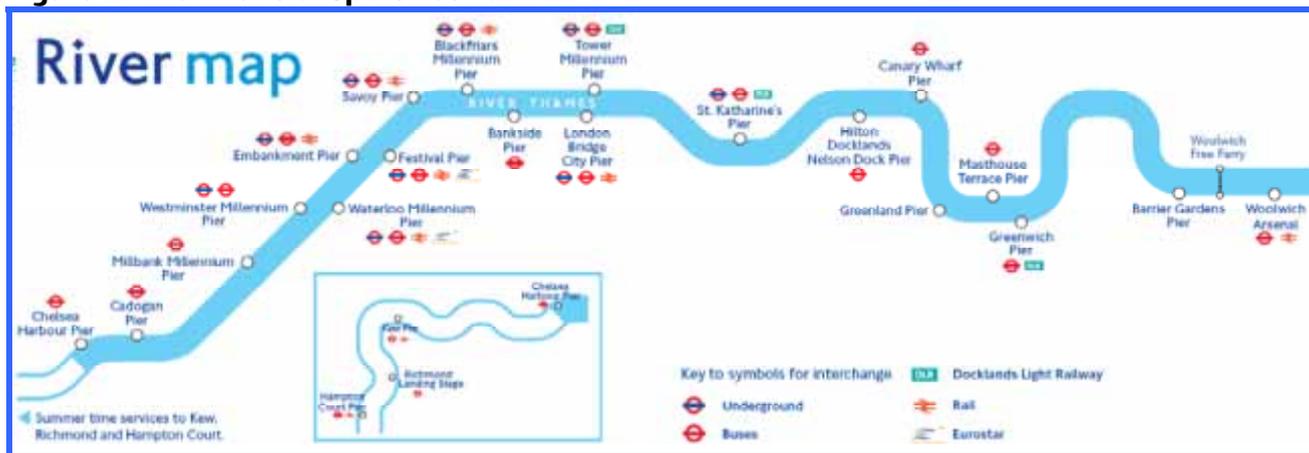


The operation and potential expansion of this type of service is the focus of this investigation.

² Transport Strategy, chapter 4M, found at: http://www.london.gov.uk/mayor/strategies/transport/pdf/final_ch04m.pdf

³ LRS written evidence

Figure 2: The river transport network



Source: LRS Guide to River Thames Boat Services

1.3.5 River transport is an attractive method of travel, passing by some of London’s most famous landmarks. It is a very popular form of transport among its relatively small but loyal passenger base. Safety measures mean that every passenger has to have a seat. River transport is considered environmentally friendly and sustainable, as it is particularly effective at initiating a modal switch from cars to public transport, and many riverside developments have limited public transport options. It is a highly reliable form of transport, running 98% of its timetable and is the quickest way to travel between several areas along the river. An expanded river transport network could have an important role in relieving congestion on other transport modes and provide a highly appealing way to travel to large scale events on the riverside, such as at the redeveloped Dome site (this is discussed in more detail in chapter 4).

1.3.6 Water based, high speed and high frequency transport is popular in several other cities around the world, such as Sydney and Hamburg. Sydney’s harbour ferry service carries 14 million passengers a year, half of which are commuters⁴. For a city with a population of 4 million, this is highly impressive. International comparisons are not exact, given that Sydney’s transport system is not as extensive as London’s, and the Thames is a relatively narrow tidal river, rather than a harbour. However, it still demonstrates that an extensive river transport network can be made to work. There is a widely accepted appreciation that river transport would be a popular mode as part of London’s transport network, but successive bodies have so far failed to make it work.



1.4 Why now?

We believe that the last few years have marked a turning point in the attitude towards and feasibility of a proper riverbus network. Where riverbus services have failed in the past there have been a number of important factors missing that are now in place:

⁴ Found at: http://www.sydneyferries.info/docs/Annual_Report_2005.pdf

- London now has its own strategic transport body (TfL) to co-ordinate and integrate services with the rest of the public transport network. This is vital to ensure that river transport is available to as wide a passenger base as possible. The existence of such a strategic body can ensure that, as unlike before, a commuter river service would not be in direct competition with other transport modes, but run as a compliment to the existing network.
- There appears to be high level political backing from the Mayor to take river transport forward. The Mayor's influence, planning and transport powers provide an opportunity to afford strategic direction and political support to river transport.
- Previous riverbus schemes were launched during a recession without a 'critical mass' of riparian developments⁵. Developers now believe that this is almost in place. The number of large scale, mixed-use developments being constructed along the river, such as the Dome and Battersea Power Station, will provide the passenger base needed for river transport to be viable.
- The current enthusiasm demonstrated by several developers and boroughs to fund and support river transport provides the multi agency approach that is needed.
- Finally, the experience gained in the last few years of having a small scale riverbus service has improved the knowledge of the type of boat design and timetabling required for the delivery of an effective service. All these factors combined mean that now is the time to exploit the full potential of the river as a transport network.

1.5 This report firstly looks at why the river has historically been underused and the practical barriers that need to be overcome to make river transport work. We then discuss how TfL and LRS can generate demand and make river transport appealing to Londoners. New opportunities for river transport schemes are examined, assessing where and how riverbus commuter services might be successful. Finally, we assess TfL's approach to river transport thus far and where changes need to be made to deliver a river transport network that fulfils its true potential.

⁵ Berkeley Homes written evidence

2. Barriers to improving river transport

2.1 Infrastructure

- 2.1.1 Central to securing more river transport are the piers. Significant issues exist with their use, co-ordination and ownership. Eight piers are owned by LRS, four others by various public bodies, with the other eleven under private ownership. Pier owners charge a fee for operators to use the pier but this is not regulated in any way. Therefore fees vary between piers and Thames Clipper told the Committee that they had gone up 150% on average in the past two years⁶.
- 2.1.2 The fragmented nature of pier ownership also contributes to the quality of surroundings and facilities provided at the pier, and the signage and branding of the pier. LRS owned piers are generally of better maintained and signposted. LRS have also provided significant sums to upgrade piers, such as Masthouse Terrace, St Katherine's and Westminster⁷.
- 2.1.3 Building new piers is costly. Whilst a pier is the only infrastructure that needs to be provided, the upfront costs can run into several million pounds. They also generally operate at a loss, and face high costs such as the maintenance; river works licence fees and rates⁸.
- 2.1.4 The Mayor's Transport Strategy states that "developing further piers" and "extending Transport for London ownership of piers" are options⁹. So how have these rather softly worded ambitions gone? After LRS acquired five piers from the PLA in 1999, it has built two new piers at Millbank (opened 2003) and Blackfriars (opened 2000). It has also acquired Bankside Pier from Southwark Council. The funding for this came from several sources: the Millennium Commission, the Single Regeneration Budget, the Corporation of London, the PLA and a ring-fenced grant from the Government Office for London (GoL)¹⁰.
- 2.1.5 LRS stated in their evidence that any proposal to purchase a pier would be subject to a 'value for money' evaluation, and that ownership is not a necessity to achieving this. They highlighted an example to demonstrate how they have been able to exert influence, though the upgrading of Masthouse Terrace. Here, in exchange for £400,000, the owners, British Waterways, agreed to allow Thames Clippers to make use of the pier for the next 15 years¹¹.
- 2.1.6 The Committee acknowledges the hard work and funding that LRS has put into the co-ordinating and maintaining piers. However, from what we have heard from stakeholders, recent and proposed pier developments have had little input from LRS. Money has mostly been secured through s106 agreements¹², particularly in the case of Woolwich Pier at the Woolwich Arsenal development (discussed in

⁶ Sean Collins, minutes of meeting with Thames Clipper and Parkview International, 11 July 2006

⁷ LRS written evidence

⁸ LRS written evidence

⁹ Transport Strategy, paragraphs 4M.6 and 4M.1

¹⁰ Found at: http://www.tfl.gov.uk/river/abt_piers.shtml

¹¹ LRS written evidence

¹² A section 106 agreement is a private agreement between the borough and the developer, which obliges the developer to fund certain infrastructure costs in return for planning consent.

greater detail in chapter 4). Whilst LRS need to secure value for money in projects they are involved in, the approach seems to be reactive rather than pro-active. Seeking value for money is good management, but limited in its strategic impact. There appears to be a lack of ideas for advancing the aims of the Transport Strategy with regard to piers.

2.1.7 LRS has limited funds, but the money put forward by private developers in recent years shows that they are prepared to fund river transport, in excess of LRS support. It was suggested that a pier fund be created, “to develop and enhance Thames infrastructure”¹³ with LRS co-ordinating developers and boroughs to secure pier funding through Section 106 agreements.

2.1.8 The Committee also heard that river transport could benefit from a Board of Pier Owners, co-ordinated by LRS. This would assist in trying to sort out some of the problems caused by the disparate number of owners, such as the variation in fees and conditions at the piers. It would provide a single point of contact if an operator was trying to set up a service, rather than having to negotiate with many different private owners. LRS undoubtedly do much good work to assist in pier co-ordination, however, we would like to see some of the work they undertake formalised. This would also enhance their public accountability.

Recommendations:

1. The Committee recommends that TfL and LRS investigate the feasibility of a central pier fund, contributed to by riparian developers and other stakeholders, to improve and maintain piers along the river.
2. The Committee recommends that TfL and LRS set up a Board of Pier Owners to enhance co-ordination and co-operation between operators, owners and developers.

2.2 Tourist operators

2.2.1 One of the biggest problems restricting the growth of river transport is LRS’s dependence on and obligation to the river tourist companies. The issues here are competition and revenue. Direct competition between a commercial enterprise and a state subsidised operation is a breach of EU competition laws. These laws are complex with no clear definition as to what is direct competition. The Committee questions however, whether a high speed, turn up and go service would provide direct competition to a slower leisure trip, which includes commentary and hospitality.

2.2.2 A more immediate problem is that tourist operators existed before the Thames Clipper riverbus service began. LRS are locked into contracts (usually ten years) with tourist operators to use piers (and therefore are dependent on them for much of their revenue). Clearly, LRS cannot simply break these contracts but if the Mayor is serious about improving river services, then TfL will need to plan how it might redirect priority towards commuter services when these tourist contracts run out.

¹³ Ed Stollery, minutes of meeting with Thames Clippers and Parkview International, 11 July 2006

2.2.3 The Committee understands that currently LRS are beholden to tourist operators, but a parallel would be that London Buses had an obligation towards the viability of the open-topped sightseeing buses that operate in Central London. They also provide a valuable tourist service and are an important part of the capital's economy, but they are not seen as a direct competitor with the bus service and do not impede TfL's ability to provide public transport.

2.3 Subsidy and measuring value for money

2.3.1 London River Services directly subsidised Thames Clippers to the tune of £364,100 in 2005/06. Carrying 524,700 passengers a year, this is a subsidy of 69p per passenger journey¹⁴. However, this is not the only financial support provided to Thames Clippers. LRS have provided various equipment and pier facilities for Thames Clippers, in addition to monies received from private developers through s106 agreements and other contracts.

2.3.2 The subsidy per passenger journey on London's buses in 2004/05 was roughly 33p¹⁵, which compares favourably with river transport. However, this comparison is very inexact, due to differing contractual arrangements and capital spends between the two forms of transport¹⁶. Prior to the awarding of the contract to Thames Clippers in 2003, a cost benefit ratio¹⁷ assessment was undertaken. It was calculated at 0.9, which means "the net cost was greater than the total quantified passenger benefits"¹⁸. However, LRS acknowledge that this will have changed since then due to increasing customers, changes to the timetable and the financial support given to the service extension to the Woolwich Arsenal. The Committee would be interested to see what the ratio would be after several years of operation.

2.3.3 However, the Committee believes that trying to measure value for money on river transport using standard TfL measures is highly problematical. Fundamental differences between river transport and, say, the bus and tube mean that one is not comparing like with like. The lack of a pre-existing network, as with the bus or tube system, must affect cost benefit calculations. An existing network means it is much easier to undertake transport modelling and project passenger numbers. When investing in a relatively untested service like river transport, it is much more of a risk. Essentially, the money is going into building a network, rather than maintaining or extending it. Factors such as the limited passenger capacity and destinations would also contribute to the low level of the cost benefit ratio.

2.3.4 The Committee questions whether standard TfL measures of feasibility are appropriate in this case. River transport is not comparable with the bus or tube service in this respect. Thames Clippers have argued that subsidy funding should be frontloaded for start up costs, such as boats and pier infrastructure, then

¹⁴ LRS written evidence

¹⁵ Based on calculations from 'Value Added', found at:

<http://www.london.gov.uk/assembly/reports/transport/value-added.pdf>

¹⁶ LRS written evidence

¹⁷ Cost benefit ratios are an attempt to tally up the potential social and economic benefits of a project against the total financial cost. TfL's measurements have been approved by the Audit Commission, the National Audit Office and the House of Commons Public Accounts Committee.

¹⁸ LRS written evidence

gradually reduced as the service becomes commercially viable. River transport services must be built up from a low capacity, with subsidy decreasing as ridership goes up. The Woolwich Arsenal service has been funded on this model, and the developers of Battersea Power Station, who have proposed a 15 minute frequency riverbus service (discussed further in chapter 4), have a similar strategy built into their business plan. Though it is not currently possible to assess how effective this approach has been, we would like TfL to monitor the situation closely, to see if it might be applied in the future.

- 2.3.5 The Transport Committee accepts that with the current model, the subsidy needed to run river transport is disproportionately high. However, we also believe that the current assessment criteria that TfL apply to river transport are not appropriate, for the reasons discussed in the previous paragraphs. We would like to see a new funding model in place. When LRS initially issued contracts for tender they were based on Gross Cost Contracts, as used on the buses at the time¹⁹. However, these were not found to offer value for money, because they are based around the fare box being taken by TfL, who pay a fixed subsidy to the operator. The incentives are based on performance, not use of service, and therefore are only effective on forms of transport with a very high ridership.
- 2.3.6 TfL have pioneered new forms of bus contracts that have been highly effective in obtaining an efficient and effective service. However, the Transport Committee does not believe that the same creative approach has been applied to river transport. We would like to see the sort of innovative approach that has served the buses so well, applied to river transport. To do this, TfL need to know corporately what they want from the river, so that any new system would, like the buses, be modelled around the needs of the service. The Committee would question what the point is of integrating river services into a Londonwide strategic body, if the body in question, ie TfL, is not willing to take advantage of the benefits such strategic oversight provides.

Recommendation:

3. The Committee recommends that TfL investigate new methods of subsidising river transport with private developers, including frontloaded subsidy, to secure a more effective and sustainable method of funding.

¹⁹ London Buses now operate Quality Incentive Contracts which work on similar principles to Gross Cost Contracts, but with stricter performance measures.

3. Marketing and creating demand

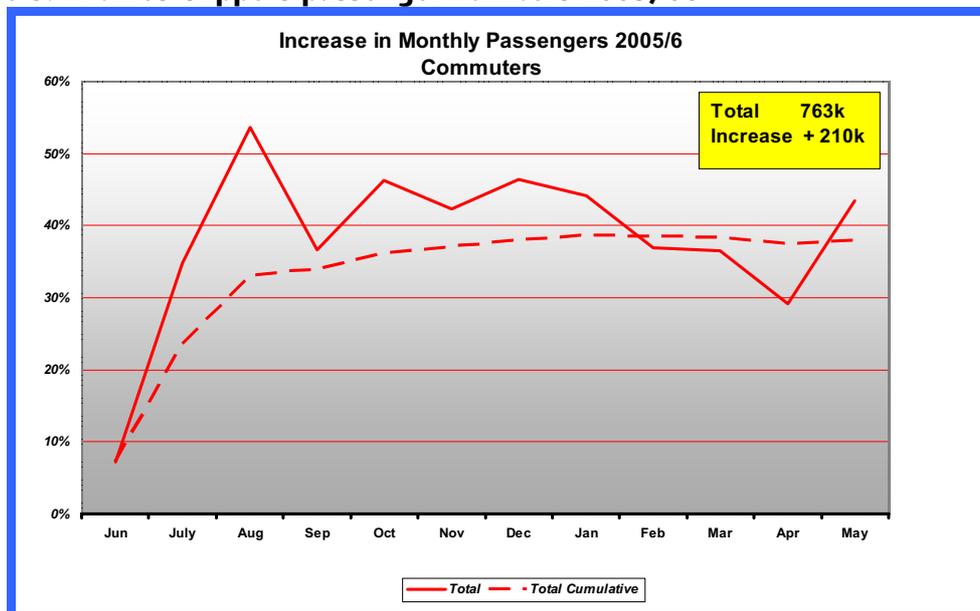
3.1 There is a chicken and egg situation with regard to the demand for river transport. Demand for a river service is low, but so too is public awareness of the service. Information that is available is also not very clear. However, there is evidence to suggest that most passengers who know about the service are very loyal to it, and will use it if they are aware of the services provided.

3.2 One example of how greater public awareness of river transport has affected usage is the aftermath of the terrorist attacks of 7 July 2005. After the explosions, all tube and train services were suspended, as well as central London bus services. River transport services were still running however, and at Canary Wharf provided one of the only ways to leave the area (the photo shows passengers queuing to get on the boats). Operators quickly responded to the demand by running additional services.



Thames Clippers ran all services for free at a ten minute frequency, whilst charter services ran their normal timetable for free, TfL having agreed to compensate them. Passenger numbers on commuter services increased by over 50% immediately after the attacks, and while this dropped off slightly, there is still an average increase of about 40% over the past year. This is despite a 40% decrease for tourist river services after the attacks.

Figure 3: Thames Clippers passenger numbers 2005/06



Source: Thames Clippers evidence

3.3 LRS have undertaken several initiatives in the past few years to promote river transport. Travelcard holders obtain a discount of a third off the cash fare. The Travelcard discount no doubt works well for passengers and operators alike and promotes integration with other services. Real time information has been provided at several piers and is being extended across the network. Advertising campaigns

have been devised in partnership with Visit London, however, these have been predominantly targeted at tourist and leisure travellers. The website provides details of all services, with real time information, time tables and maps. River transport has also been integrated into the Journey Planner function.

- 3.4 However, Thames Clippers and developers involved in river transport schemes have both stated that there is much more scope for better promotion of river transport by LRS. Whilst many piers are marked on the tube map and included in the automatic on-train announcements, the map does not include every pier used by commuter services. In fact, there is no differentiation between piers used by tourist and commuter services. Routes are not marked on maps and the maps themselves are not self-explanatory. LRS have recently produced spider maps (the same style of route map used at bus stops) that are displayed at piers, though these are not yet on the website. This idea was discussed in a meeting the Committee held with LRS, who indicated they would put this in place. We will be monitoring this situation to ensure it is implemented
- 3.5 Piers owned by TfL display corporate signage to make them easily identifiable, however private piers do not. River bus services make use of private piers but the lack of signage means that there does not appear to be a joined up approach. Comparatively, it is unmistakable when you are entering a tube station. Signage between transport interchanges, such as between a tube station and pier, is also limited, with scope to more clearly mark out routes between the two. This has an obvious and direct impact on integration with other services.
- 3.6 We understand that LRS have had problems with the relevant landowners and authorities who are not prepared to grant permission to erect signage both on the piers and between stations and piers. This is an absurd situation, particularly in cases where we have been told that landowners who also own a pier are not keen on people walking through their land to reach the pier. One such example is at London Bridge, where the Hay's Galleria shopping centre lies between the tube station and pier (which is in fact owned by the developer). The Committee urges those who grant permission for signage to work in a more constructive manner with LRS and ensure that the public need for directional signage between transport modes is properly met.
- 3.7 Although Travelcard holders obtain a discount on their fare, there is currently no provision to use Oyster Pre-Pay. This is the most effective way of integrating ticketing for river transport, as full inclusion in the Travelcard scheme would disproportionately push up the overall cost of a season ticket because of the higher costs of riverbus journeys. It would also need the approval of all participants in the Travelcard scheme (which includes train operating companies).
- 3.8 More advanced technology would need to be used to allow use of Pre-Pay Oyster, and LRS are currently investigating this. The Committee is unsure as to why it has not been introduced sooner however, particularly given the enthusiasm with which TfL has pursued the same matter on the railways.
- 3.9 We believe that the issues raised here over marketing and promotion could be easy 'quick wins' for river transport, and we strongly urge TfL to take up the measures we have suggested here. Public awareness of river transport is still relatively low despite the hard work of LRS. The events of 7 July last year

demonstrate how increased awareness increases usage. We strongly encourage TfL to give river transport more priority and support in promoting the services.

Recommendations:

4. The Committee recommends that TfL ensure that signage is clearly displayed at all piers where commuter services operate, particularly at interchanges. This should be done with more forthcoming co-operation than has previously been displayed by relevant landowners.
5. The Committee recommends that TfL re-examine how commuter river services can be more effectively identified and incorporated onto the tube map and use their current advertising to target commuters in addition to the existing tourist and leisure travel market.
6. The Committee recommends that the use of Oyster Pre-Pay on river transport is prioritised and implemented at the earliest possible time.

4. New Schemes

- 4.1 The cost of river transport is probably too high to justify being supported by the public purse alone. Costs of purpose designed, high speed boats can be up to £2 million pounds, and running costs, such as fuel and staffing are also more costly than other forms of transport.
- 4.2 Where riverbus services have worked in recent years though, there have been some defining characteristics; most noticeably strong partnership working between operators, developers and boroughs. This has resulted in well planned infrastructure and a proper funding regime is in place, and created demand for the service.

4.3 The role of private developers and section 106 agreements

- 4.3.1 Several private developers have been willing to invest money and resources to try and make river services work since the involvement of Olympia and York in the riverbus service attempted in the early '90s. This could be viewed as 'enlightened self interest', especially where a site is underserved by public transport. Mixed use developments, such as the Dome, are particularly suited to river transport, as they attract users throughout the day and one of the central problems of river transport is levels of usage during off peak hours. With residential developments, developers will sell the properties and move on.
- 4.3.2 At mixed use developments, however, developers will be involved in running the site in the long term. They will therefore be prepared to contribute to developing infrastructure. In the past, purely residential developments did not provide a good enough business case for developers to get involved in river transport. Below we look at three examples of private developers who are currently involved in river transport projects, and examine the financial and partnership arrangements.

4.4 Battersea Power Station

- 4.4.1 The developers of the Power Station, Parkview International, have proposed a river bus service calling at key Central London piers from Chelsea to Canary Wharf



to run every 15 minutes between 6am and 12pm. It is to be operated by Thames Clippers and Red Funnel Ferries. Parkview and associated partners would contribute to the upfront costs of setting up and running the service, which is estimated to be around £35 million (including pier infrastructure and boats). Contributions from TfL and other stakeholders will also be sought.

- 4.4.2 The service has been designed around extensive modelling, done in partnership with TfL and Thames Clippers. Stops have been chosen on the basis of key interchanges for likely users and tourist hotspots. The Power Station is a mixed use development, with residential, business, commercial and leisure facilities,

which gives it a broad base of potential river bus users, with an estimated 13-15 million visitors per year. Once established, it is envisaged that the service will carry more than 4 million river bus passengers per year. The developers are currently examining the possibility of linking their service to the Dome, which would require involvement from O2.

- 4.4.3 Parkview International have a clear motivation for developing a river transport network, as the current transport connections at the site need development, the overground Battersea Park Station being the nearest, with Vauxhall as the closest tube station. Parkview is also proposing to invest significant sums in other transport infrastructure, including £25 million to upgrade Battersea Park Station. Furthermore, although the planned river bus was originally designed to primarily serve the Power Station, the business model projected that the service could be equally viable between other stops on the river. Therefore it was expanded into a more comprehensive service. Depending on the success of the service and the interest of other stakeholders, Parkview believes it could be extended further to the east and west.

4.5 The Woolwich Arsenal

- 4.5.1 Greenwich council recently negotiated a section 106 agreement with Berkeley Homes to fund a commuter riverbus service (operated by Thames Clipper). Woolwich Arsenal pier was built in 1998 by the council and jointly funded by the LDA. This was done in advance of agreeing the current service, in anticipation of the potential need. Greenwich negotiated with Berkeley Homes to fund a six month trial service to Woolwich Arsenal, and waived their own pier fees.



- 4.5.2 Whilst the service was slow to take off, passenger numbers gradually increased and an agreement to run the service for another three years has now been made. The subsidy is 'frontloaded' and is reduced year on year as the service becomes sustainable. The table below demonstrates this:

Figure 4: Subsidy and passenger forecast for Woolwich Arsenal service

Year	Annual Subsidy	Passenger Forecast	Subsidy per journey
2006	269,000	62,50	£4.30
2007	159,000	69,080	£2.30
2008*	50,000	92,994	54p

* Year 3 subsidy is an additional payment from Berkeley Homes - it will only be paid if the service level still shows a subsidy is required.

Source: LB Greenwich

- 4.5.3 Again, the Woolwich Arsenal site is relatively isolated in terms of public transport, hence Berkeley Homes' involvement. It is in their interest to provide funding for

transport infrastructure and the scheme has served residents and the council well. The Greenwich Waterfront Transit scheme will provide additional transport links between Woolwich town centre and Woolwich Arsenal pier, ensuring that the river bus is well integrated into other forms of transport.

- 4.5.4 Greenwich has strong political support for river transport from Council Members. The potential to develop river services is discussed in the Local Implementation Plan (see Appendix D). The Council has successfully extracted s106 money from developers for general transport infrastructure projects (as well as specific river transport projects), which it has used for river transport. This money is separate from funds secured for other social infrastructure projects, such as affordable housing. The Council has been very effective at maximising the funding and involvement that private developers are prepared to offer.
- 4.5.5 Greenwich has a number of proposed and residential sites they want to utilise for river transport. The redevelopment of Woolwich town centre and proposed residential sites on the Greenwich Peninsula offer opportunities to make use of the proximity of the river.

4.6 The Millennium Dome²⁰

- 4.6.1 The redevelopment of the Millennium Dome site includes a potential river transport link with a frequent service for evening events. The Mayor recently announced that he had held talks with Philip Anschutz regarding subsidising a river bus service to the Dome²¹. They discussed a regular commuter service enabling people all along the river to travel on the Thames, including locations of piers and the level of subsidy that would be needed. Anschutz is now looking at working with TfL to “get a better functioning river service”.
- 4.6.2 The Committee welcomes this high level backing for river transport. Parkview International also discussed with us the possibility of linking their service to the Dome, which would provide an additional boost to the service, connecting two major mixed use sites. A pier already exists on the east side of the Greenwich Peninsula, built under a s106 agreement in 1999.
- 4.6.3 The Committee believes that private developers have a vital role to play if river transport is made to work. Their ‘enlightened self interest’ is beneficial to everyone. River transport should not be wholly funded by the public purse. One previous problem with riverbus services is that a subsidised service is vulnerable to that funding drying up. A form of ‘frontloaded’ s106 funding guarantees support whilst the service is starting up, but does not leave the scheme dependent on an unsustainable subsidy. This allows mixed use developers with long term interests to invest in infrastructure through time limited s106 funding. ‘Pump priming’ river transport projects could allow private developers to reclaim their initial costs and have the business running independently after a few years.
- 4.6.4 Private sector involvement needs to be drawn in by boroughs, when they are reviewing planning permission. Greenwich Borough assesses every riverside

²⁰ The Millennium Dome was renamed the O2 last year, but is discussed here as the Dome for ease of reference

²¹ Mayor’s Press Conference 11 July, found at: <http://www.london.gov.uk/webcasts.jsp>

development for potential s106 opportunities and has been successful in securing involvement from them in river transport schemes. We would like to see more boroughs follow this lead, particularly those who are relatively isolated in terms of public transport. Any method of reducing and discouraging car use should be pursued, and is in the interest of local authorities.

4.7 The Thames Gateway

The Thames Gateway will witness the largest scale attempt at regeneration in London for many years. Concerns have already been raised about transport links, with fears that the area could be isolated. As we have seen previously, the river is an important resource for riverside areas currently underserved by other forms of public transport. We believe that part of the transport plan should include river transport links for the riparian stretch of the development area. The river to the east of Tower Bridge has far fewer speed restrictions than in the west (there is a 8 knot speed limit past Wandsworth Bridge), and so could provide a high speed route into Central London. Once the redevelopment of the Thames Gateway begins in earnest, we would urge TfL to engage fully with riparian developers to provide a riverbus service.

4.8 The Olympic Games

4.8.1 Another opportunity for river transport will be during the Olympic Games at venues such as the Dome, ExCel Centre and Greenwich Park. The Committee was disappointed to note that there is no mention at all of river transport in the Olympic Transport Strategy, despite reference to the 'River Zone'²². We believe that it would provide a very pleasant method of travelling to venues. Road capacity and public transport in Greenwich are limited, and river transport is another way that TfL can discourage people from travelling to the venue by car. The wording of the Transport Strategy states that 'passenger services will be encouraged, particularly services that relate to its cultural and architectural excellence and tourism'²³. This would certainly seem to apply to the Olympic Games, and yet it is not part of the Olympic Transport Strategy.



4.8.2 Even the current service would serve the aforementioned venues effectively. Many visitors will be staying in Central London and will be arriving and leaving venues during peak hours. However, the Committee believes there is much more ambitious scope to utilise river transport during the Games.

4.8.3 The schemes discussed previously in this report to increase frequency and the number of boats could be used during the two week period to serve the riverside venues in the east. We have heard from both Thames Clippers and developers involved in river transport schemes that they are very keen to run additional services during the Games, though they have received little encouragement from

²² Found at: http://www.london2012.org/NR/rdonlyres/C27233BA-E663-4FD8-8EC8-A7896B547EFD/0/Theme_14_transport.pdf

²³ Transport Strategy, Policy 4M.1

TfL or the ODA. It would provide a fantastic opportunity to advertise the services and increase passenger numbers. Corporate branding on boats (such as that seen on the Tate to Tate service) could provide the funding necessary to run additional services. This would provide a high profile and attractive opportunity for corporate sponsors to demonstrate their support for the Games.

4.8.4 The Committee would stress that additional services need to be in place before the Games. However, the use of existing and additional river transport during the Games would act as a showcase for the services, and it could have a similar effect to that which was seen after 7 July, providing a catalyst for additional growth.

4.8.5 River transport is a particularly attractive way to travel to the venues previously mentioned. All spectators will receive ticketed travel to Olympic events, with a choice of modes. This would be an ideal way to encourage the use of river transport and we believe it would be popular. We would also like ideas such as riverbus transport for athletes, volunteers and workers at these Olympic venues to be considered. The Transport Committee will be pursuing these issues during its ongoing scrutiny of Olympic transport issues.

Recommendation:

7. The Transport Committee recommends that all riparian boroughs to examine every development for s106 river transport potential and incorporate this into their UDP/LIP.
8. The Transport Committee recommends that TfL and the LDA look at river transport options in the Thames Gateway.
9. The Transport Committee recommends that TfL and the ODA incorporate river transport into the Olympic Transport Strategy.

5. Conclusions

- 5.1 Peter Hendy (at the time Head of Surface Transport, now Commissioner for Transport) discussed river transport at an Assembly Plenary session on 15 May 2003. He informed the Assembly that TfL had put out an open tender to improve river transport, that two tenders had been received but neither provided value for money, in TfL's opinion²⁴.
- 5.2 The Committee cannot imagine TfL undertaking such an exercise on any other form of transport and it is perhaps demonstrative of a lack of strategic direction and corporate expertise within TfL. The Committee heard from stakeholders that LRS has worked hard to support river transport but it appears to be confined by its limited remit. It is important therefore to distinguish between TfL as a strategic body and LRS as an operational subsidiary. LRS has fulfilled its role in terms of facilitating projects, but TfL has not provided the necessary strategic leadership.
- 5.3 We believe that the river offers excellent opportunities for transport, in particular as a premium commuter service and congestion reliever, and also for catering for large events and tourism. TfL's Transport 2025 document, planning the development of London's public transport network states 'In London's system, even small increases in demand can result in disproportionate increases in crowding and congestion'²⁵. It therefore follows that any additional capacity could relieve congestion and crowding.
- 5.4 There appears to be a lack of corporate appetite within TfL to make river transport viable. No doubt there are many complex issues and problems, but the Committee has not seen any evidence to suggest that there has been a serious attempt to tackle these in any meaningful way. We found during this investigation that the work of LRS has been positive and helpful. Therefore, we are not criticising what *has* been done, but what *has not* been done.
- 5.5 Initiatives such as the Woolwich Arsenal service, Battersea Power Station proposal and the Dome idea have appeared, and yet LRS has not been central to their development. Wandsworth Borough mentions that it approached LRS to identify whether any opportunities exist for additional services, but did not receive any encouragement in the response. The reasons cited were the cost and value for money²⁶.
- 
- 5.6 TfL has strict value for money criteria and this Committee has always held TfL to task over this. However, we believe that the current framework and corporate approach severely restricts LRS's ability to ensure that value for money is achieved. Without an effective strategy, clear direction and the full engagement of TfL, river transport will never fulfil its potential.

²⁴ Assembly Plenary, 15 May 2003

²⁵ Found at: <http://www.tfl.gov.uk/tfl/downloads/pdf/T2025.pdf#search=%22transport%202025%22>

²⁶ Wandsworth written evidence

- 5.7 We believe that TfL and LRS ought to be actively working with developers and boroughs interested in funding river transport to ensure that proposed schemes do represent value for money and are viable services. There is a distinctive lack of planning by TfL.
- 5.8 The Committee believes that TfL needs to recognise the river as a proper resource to be utilised. Other cities have developed successful schemes, and examination of these schemes may be useful to establish how they have been made to work. The conditions and circumstances today and the opportunities on the horizon mean that many of the past problems, such as the lack of a strategic body, lack of a critical mass of developments and a lack of research on boat design are now no longer relevant. There is now political support from the Mayor, a growing number of mixed use developments and private developers prepared to fund and support services. We believe that river transport has a much greater chance of success now than at any other time in the past.
- 5.9 The Committee urges the Mayor, as Chair of the TfL Board to press for full engagement by TfL with river transport. This needs to involve a clear strategy with priorities, deadlines and an indicative budget. We also think that a reconsideration of how TfL assesses value for money on the river is necessary. LRS need a much wider remit to be able to work with boroughs, developers and operators to develop schemes. They should establish what passenger services need to be provided on the river, including which locations need better linkages (particularly with regards proposed developments) and which journeys would be best made by river. Greater financial input will be imperative, but not excessive with the input of developers and other partners.

The recommendations we have made in the previous sections will improve the current services, but we believe a wholesale change of attitude is needed from TfL if the river is to be fully utilised and river transport made in to a viable service.

The forthcoming revision of the Transport Strategy is the ideal place to start with this, and we urge the Mayor to develop a holistic plan for passenger services through this document. We believe that TfL can and should do more to champion workable solutions to increase commuter transport on the Thames.

Appendix A – List of recommendations

1. The Committee recommends that TfL and LRS investigate the feasibility of a central pier fund, contributed to by riparian developers and other stakeholders, to improve and maintain piers along the river.
2. The Committee recommends that TfL and LRS set up a Board of Pier Owners to enhance co-ordination and co-operation between operators, owners and developers.
3. The Committee recommends that TfL investigate new methods of subsidising river transport with private developers, including frontloaded subsidy, to secure a more effective and sustainable method of funding.
4. The Committee recommends that TfL ensure that signage is clearly displayed at all piers where commuter services operate, particularly at interchanges. This should be done with more forthcoming co-operation than has previously been displayed by relevant landowners.
5. The Committee recommends that TfL re-examine how commuter river services can be more effectively identified and incorporated onto the tube map.
6. The Committee recommends that the use of Oyster Pre-Pay on river transport is prioritised and implemented at the earliest possible time.
7. The Transport Committee recommends that all riparian boroughs to examine every development for s106 river transport potential and incorporate this into their UDP/LIP.
8. The Transport Committee recommends that TfL and the LDA look at river transport options in the Thames Gateway.
9. The Transport Committee recommends that TfL and the ODA incorporate river transport into the Olympic Transport Strategy.

Appendix B – List of Evidence submitted to the Committee

The Committee would like to thank all those organisations and individuals who took the time to contact the Committee and submit their evidence to the scrutiny.

If you wish to obtain a copy of any of the evidence listed please get touch with Bonnie Jones via e-mail at bonnie.jones@london.gov.uk

Written Submissions

London River Services (TfL)
Thames Clipper
Berkeley Homes
Port of London Authority
London Development Agency
LB Greenwich
LB Tower Hamlets
LB Southwark
LB Wandsworth

Meetings

The Transport Committee held several meetings with river transport stakeholders:

11 July 2006

Sean Collins, Managing Director, Thames Clipper
Ed Stollery, Project Manager – Riverbus, Parkview International

13 July 2006

Andy Griffiths, Head of London River Services

1 August 2006

John Anderson, Berkeley Homes
Kim Smith, Principal Transport Planner, LB Greenwich

Appendix C – Transport Strategy, 4M River Thames and other waterways

4M.1 The Thames is London’s major defining structural feature and divides the city between north and south. The River provides an important cultural resource and a pleasant way of enjoying the many important landmarks situated close to its banks. About three million people a year travel on the Thames by boat, and more use the Thames-side footpaths. The River also has an important role in the movement of freight. In 1999, the Port of London handled 10.9 million tonnes of freight destined for within Greater London (see chapter 4K – freight, delivery and servicing).

4M.2 Other navigable waterways in London are used extensively for leisure purposes, including canal towpaths as walking and cycling routes.

4M.3 A tidal river such as the Thames has inherent safety risks. A major safety review was undertaken in 2000 and the recommendations are being implemented. Transport for London (TfL) regularly undertake safety audits.

Policy 4M.1 The safe use of the Thames for passenger and freight services should be developed. Passenger services will be encouraged, particularly services that relate to its cultural and architectural excellence and tourism. Use of London’s other navigable waterways for freight, consistent with their roles for leisure use and as ecosystems, will also be encouraged.

Passengers

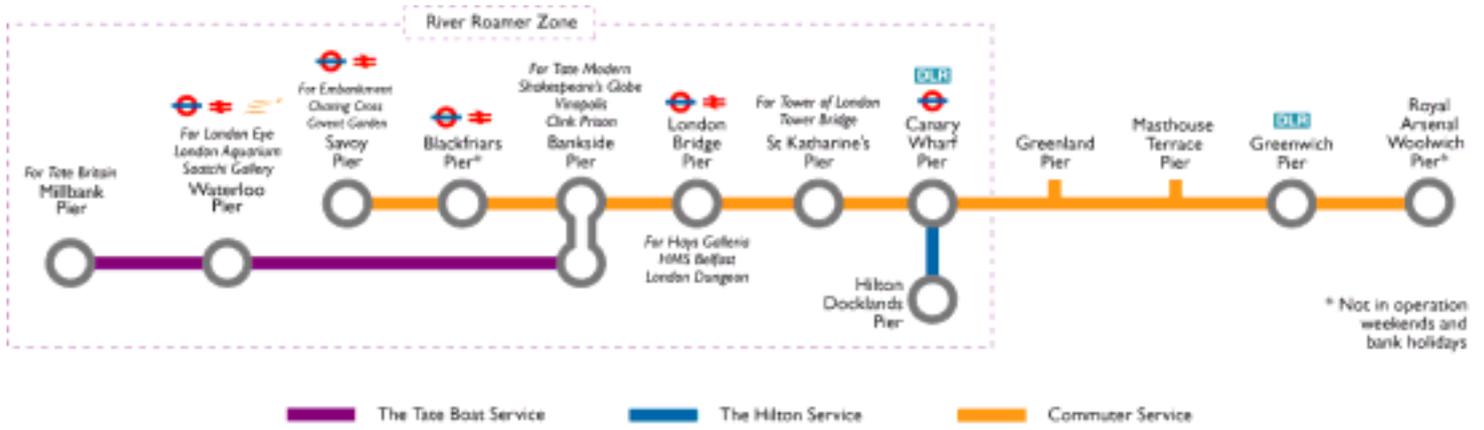
4M.4 Responsibility for passenger services using TfL piers has passed to London River Services Limited, a subsidiary of TfL. Recent developments in the provision of passenger services on the Thames include the development of new piers and the introduction of new services.

4M.5 Options for increasing the use of the Thames include developing further piers, examining the viability of extending services, improving their regularity and frequency, and introducing new services.

4M.6 One impediment to increased use of the Thames for passenger services is the lack of integration with other transport services. Signing, information, good interchange and attractive access routes all need attention. A Travelcard discount scheme for scheduled services has recently been introduced. The potential for closer fare integration will be kept under review.

Proposal 4M.1 Options for extending use of the Thames for passenger travel will be explored, including extending Transport for London ownership of piers, where this provides value for money, and measures to integrate river services with land based public transport, including fares, ticketing and information.
(Progress on exploring options will be made as soon as is practicable.)

Appendix D: Routemap of Thames Clipper Services



Appendix E: Excerpt from Greenwich LIP on river transport

River Passenger Services

2.1.26 The River Thames has great potential for increased use by riverboat passenger services, both for commuter services to Central London and cross-river, directly connecting the new riverside developments on both sides. A key to success is integrated ticketing, good onward bus connections to local catchment areas and an appropriate level of subsidy, having regard to its environmental advantages and relatively low infrastructure costs compared with other modes.

2.1.27 Currently a commuter riverboat service operates between Greenwich and Central London at peak hours only. The provision of new piers at Woolwich (Royal Arsenal) and on the Greenwich Peninsula near the Dome/North Greenwich Station provides an opportunity to expand and promote river passenger services both to Canary Wharf and Central London.

2.1.28 In the medium term a zig-zag service crossing and re-crossing the river from Thamesmead through to Deptford, can be envisaged, which, coupled with longer distances commuter services to Central London would greatly enhance cross river travel opportunities. The provision of local bus links to piers would greatly enhance their potential catchment either by means of new shuttle services or the diversion of mainstream bus routes. Opportunities exist at Thamesmead, Royal Arsenal, the Thames Barrier the Greenwich Peninsula, Greenwich and Deptford for bus/riverboat connections.

Appendix F – Orders and Translations

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Appendix G: Principles of scrutiny

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- are conducted with objectivity and independence;
- examine all aspects of the Mayor's strategies;
- consult widely, having regard to issues of timeliness and cost;
- are conducted in a constructive and positive manner; and
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