



Tyne and Wear Integrated Transport Authority - Scrutiny Advisory Group

Meeting to be held on Thursday 16 January 2014 at 1.00 pm in a Committee Room, Sunderland Civic Centre

Membership: N Padgett, D Tate, J Wiper, A Schofield, S Fairlie, D Huddart, M Graham, T Graham, R Porthouse, B Watters and B Caithness

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AGENDA

Page

1. Welcome and Introductions

2. Apologies for Absence

3. Declarations of Interest

(If any Member has a non-participatory interest please complete the appropriate form and hand this to the Democratic Services Officer before leaving the meeting.

Members are reminded to verbally declare their interest and the nature of it and, if prejudicial, leave where appropriate at the point of the meeting when the item is to be discussed.

4. Minutes of Previous Meeting Held on 10 October 2013

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Key Items

5. Bus Strategy Delivery Project - progress update

9 - 10

Report by J Fenwick, Nexus

6. Six Month Policy Update

Members are requested to note the intention to circulate the above report on a supplemental agenda in accordance with the provisions of the Local Government (Access to Information) Act 1985

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|------------|--|----------------|
| 7. | Public Transport Provision for Children | 11 - 16 |
| | Report by G Robinson, Nexus | |
| 8. | Smart Ticketing - progress update | 17 - 20 |
| | Report by J Fenwick, Nexus | |
| 9. | Passenger Information Task & Finish Group - findings and recommendations | 21 - 24 |
| | Summary of the findings and recommendations of the task & finish group which will be submitted to the ITA in March 2014, Councillor J O'Shea | |
| 10. | Combined Authority - progress update | |
| | K Christon, Policy and Information Officer will provide a verbal update on any known progress. | |



Tyne and Wear Integrated Transport Authority - Scrutiny Advisory Group

10 October 2013
(1.00 - 2.50 pm)

Present:

Councillor: N Padgett (Chair)

Councillors: D Tate, J Wiper, S Fairlie, D Huddart, M Graham, T Graham, R Porthouse,
B Watters, B Caithness and J O'Shea

In attendance:

CLlr D Wood	- Chair of the ITA (for agenda item 5)
K Christon	- Policy and Information Officer, Newcastle City Council
G Robinson	- Business Improvement Officer, Nexus
J Fenwick	- Director of Finance and Resources, Nexus
P Fenwick	- Project Director to the New Tyne Crossing, Newcastle City Council
L Camsell	- Democratic Services

23. WELCOME AND INTRODUCTIONS

The Chair welcomed everyone to the meeting and those members and officers present introduced themselves.

24. APOLOGIES FOR ABSENCE

Apologies were received from Councillor Schofield.

25. DECLARATIONS OF INTEREST

All members declared a general interest as they all held a concessionary travel pass. Other declarations were noted and members reminded that all declarations were now held with the individual authorities.

26. BUS STRATEGY DELIVERY PROJECT

Submitted: Report of the Policy and Information Officer (previously circulated and a copy attached to the Official Minutes).

Councillor D Wood, Chair of the Tyne and Wear Integrated Transport Authority, (ITA) outlined the proposals discussed by the ITA at its meeting on 26 July 2013 and the current 14 week consultation process. The meeting was also informed that the ITA intended to consider responses to the consultation at its meeting scheduled for January 2014. If the ITA decided to continue with the proposed Quality Contract Scheme (QCS) they would be required to formally refer the proposal to the QCS Board established by the Senior Traffic Commissioner. The Board would consider whether the public interest criteria, statutory notices and consultation requirements had been met or whether further amendments were necessary. Following consideration by the QCS Board the ITA will then meet to discuss whether or not to proceed with the Scheme. The competitive tendering process to establish the Quality Contracts under the Scheme would be subject to the European Procurement process.

Councillor Wood also informed members that the bus operators had embarked on a publicity campaign to challenge the proposed scheme. Members queried what publicity had been circulated by the ITA on the QCS proposals and suggested that there may still be a lack of understanding by the general public, which may need to be addressed.

Nexus officers circulated a copy of a statement which was to be circulated in the local press. The advert 'Our proposal for better buses; the facts' provided a zone map and gave details of proposed ticket prices if the ITA agreed to the Scheme; a flat rate fare of £1.30 would be applied to zone 1. A total integration system would enable transport users to purchase just one ticket for multi-mode travel (Metro + Bus + Ferry).

Members then made the following points/raised questions:

Referring to the European Procurement process a question was raised about whether there would be any protection for the small transport operators who may only wish to operate across smaller, local areas. Councillor Wood explained that it was the intention for Quality Contracts to be structured so that smaller operators, including taxi operators, would have the opportunity to submit bids for the tender process (NB Section 4.8 of the QCS Proposal refers).

With reference to the 'zone' areas members queried whether the actual zones could be amended so that 'zone' 1 covered a larger area. This would ensure that the maximum number of users benefited from the flat rate fare of £1.30. Councillor Wood confirmed that the scheme had been designed to keep fare issues to a minimum, and that while the proposals were designed to be fair and equitable, they also had to be financially viable.

In response to members queries about environmental issues, Councillor Wood confirmed that operators would be encouraged to use low carbon fuel vehicles, as is the case currently.

Reference was made to a claim made by the bus operators that fares in Sunderland and South Shields would increase by approximately 20%. In response Nexus officers drew members' attention to the article 'Our proposal for better buses: the facts'.

Members briefly discussed transport ticketing, comparing the lack of integration in Tyne and Wear with modern transport systems used in other parts of the UK and in Europe. Comments were made about the desirability of a 'one swipe card' system which could be used to access more than one mode of transport.

Reference was made to those passengers who wished to travel from Tyne and Wear into Northumberland and Durham and the associated difficulties of purchasing various tickets over and above the Tyne & Wear day ticket, rather than one complete network card valid across county boundaries. Councillor Wood informed the meeting that discussions had taken place with Durham and Northumberland informing both authorities of the proposed QCS.

An issue was also raised as to whether the proposed scheme could be made 'future proof' in order to deter any changes that could arise from the introduction of a Combined Authority.

Members asked about the young person's card and if the scope of this would be re-considered to recognise that there will be young people still in education up to the age of 18. Councillor Wood said that the options for young people in full-time education up to the age of 18 were being examined and formed part of the QCS proposals (NB Section 1.2.6 refers) .

In response to a question as to whether the price of a Local Discretionary Metro Gold Card Scheme would remain at £25 per annum officers confirmed that at the present time there was no plan to increase the cost.

A member asked for confirmation as to whether those areas already served by public transport would see a reduced service under the proposed scheme or whether the current services would be protected. Councillor Wood confirmed that the ITA would focus on a service based on need and that there would be no changes to the current level and network of services from making the QCS for the first 12 months.

At this point Cllr O'Shea proposed that the ITA Scrutiny Committee support the proposed QCS and the comments and questions raised be incorporated into a response to the ITA.

Councillor Wood offered to attend the next meeting in January to provide a further progress update to the group.

RESOLVED – That

- 1 The Integrated Transport Authority Scrutiny Advisory Committee agreed to support the Quality Contract Scheme proposal.
- 2 Comments and questions raised by members be incorporated into a suitable response to the Chair of the Integrated Transport Authority.
- 3 Councillor Wood be invited to attend the next meeting in January 2014

27. MINUTES OF PREVIOUS MEETING HELD ON 11 JULY 2013

RESOLVED – That the minutes of the meeting held on 11 July 2013 were agreed as a correct record and signed by the Chair.

28. **UPDATES**

Submitted: report of the Project Director to the New Tyne Crossing (previously circulated and a copy attached to the Official Minutes).

(a) **Tyne Pedestrian & Cyclist Tunnels - Phase 3 Improvement Works**

P Fenwick (Project Director to the New Tyne Crossing) presented the report the purpose of which was to inform members of progress with the Phase 3 Improvement Works and the associated arrangement to maintain this cross Tyne link for users.

Two leaflets were circulated to members a) Refurbishment Progress July 2013 and b) Refurbishment Progress September 2013. Both leaflets provided photographs of the works carried out and the appearance of the tunnels as works progressed.

Members were informed of the presence of asbestos in the rotunda roof lining and the progress/actions on this issue. GBBS (the main contractor) had engaged 2 specialists in hazardous material to advise them on the safe extraction of the asbestos. GBBS were advised that there was a significant risk attached to applying an encapsulating material and subsequently an instruction was given to GBBS to remove the lining material; Local Planning Authorities had been notified. The rotundas had now been certified as clean and had re-opened.

Work was to begin on the extraction of the old escalator and the new inclined lift was in production in Italy.

A Shuttle Bus Service, operated by Priory Coaches was to remain in service until the tunnels reopened in August 2014. In response to customer need TT2 Ltd had established a Night Service for those shift workers who relied on the tunnels to commute to work; the service currently had 60 registered customers.

Referring to the new inclined lift P Fenwick explained that one side of the lift would be glazed thereby allowing users to view the original escalator drivers. The old escalators will be locked down and retained for conservational purposes.

In response to a question about passenger safety and security, members were made aware of public feedback from user surveys which raised concerns about security in the tunnel with no natural light. To help address these concerns an enhanced lighting system would be installed in the tunnel; the lighting will be sharper and crisper creating the perception of more light.

Members were further advised that microphones (designed not to pick up 'normal' conversation levels) and CCTV were to be installed as part of the improvement works; this would help to address concerns raised about security. The CCTV and microphones would be monitored 24/7 by TT2 Ltd.

P Fenwick offered to host a meeting of the group at TT Offices in August 2014, so that they could also see the completed works.

RESOLVED – That the report be noted.

(b) Rail Devolution

Submitted: Presentation Slides ITA members Inspection 2013 (previously circulated and a copy attached to the Official Minutes).

J Fenwick reminded members that at their last meeting they had requested an update be provided on Rail Devolution. The presentation slides circulated were a summary of an ITA member's inspection.

Points to note included:-

Members were reminded that it is proposed that decision making for railways in the North should be devolved to the North; a statement confirmed by both McNulty on efficiency and Brown on franchising. It was expected that the Secretary of State will make a decision on this by the end of November.

A devolved railway would lead to rail increasingly being planned in conjunction with local transport, economic development and regeneration investment.

Within the localism agenda all partners saw the benefits of rail devolution as an enabler of economic regeneration; helping those who were currently Not in Education or Employment or Training (NEET).

Clarity was needed about what the proposition from the Secretary of State would actually mean for the north east.

ANEC had already responded to the consultation on rail devolution and the East Coast franchise.

The Northern Rail and Transpennine were likely to be extended.

With regards to the Northern Rail and Transpennine (a combined 7 year franchise) officers were of the opinion that it was essential that both were combined.

The north would need to establish a special purpose vehicle to take the proposals forward, providing a decision making structure that was efficient, inclusive and which protected the interests of all 33 authorities.

The North East leaders had all endorsed the proposition and supported rail devolution. The Leaders had tasked officers with preparing a rail strategy for the north east.

Leaders Meeting - The leaders had all endorsed the North East Business Unit proposition and supported rail devolution. The Leaders had tasked officers with preparing a rail strategy for the north east.

Questions/Comments

Reference was made to the proposed independence of Scotland and whether there would be more scope for over the border trade and would it be more attractive to have improved rail links with Scotland. J Fenwick confirmed that there might be options as well as opportunities to reintroduce local routes and reminded members of the proposal to re-open the Ashington – Blyth – Tyne rail link.

A member voiced concern that the north east region was segmented and cut off from the main cities in the southern regions. In response J Fenwick explained that there was a lot of money at stake and risks involved with the East Coast mainline franchise. However, Nexus had experience with light rail and ANEC were providing leadership by its involvement with the rail devolution process.

Views were expressed that a) there was a lack of public awareness about rail franchises and what it meant and b) the public failed to understand how far behind we were when compared to Europe.

RESOLVED – That the report be noted.

(c) **Combined Authority**

K Christon, the Policy and Information Officer gave a verbal update on progress with the proposed Combined Authority.

Members were informed that all 7 authorities had agreed the proposal which had been submitted to the Secretary of State for Department for Communities and Local Government. Central Government was now drafting the orders which would then proceed through the parliamentary system.

Combined scrutiny function arrangements would be created to undertake the scrutiny of the Combined Authority and any other sub committees.

It was agreed that further discussions should take place at the January meeting of the Committee by which time it was hoped further information would be available.

RESOLVED – That the verbal report be noted.

(d) **Task and Finish Group - Passenger Information Systems**

Councillor O'Shea informed the meeting that the Task and Finish Group – Passenger Information Systems - still required a representative from Gateshead Council. Councillor T Graham volunteered to represent Gateshead. The next meeting was to be held on 17 October.

The Terms of Reference had been agreed at the initial meeting and members expected to report back to the January meeting of the Scrutiny Committee. Officers from Nexus had kindly agreed to assist the Task and Finish Group.

Noted – That Councillor T Graham represent Gateshead on the Task and Finish Group - Passenger Information Systems.

29. **ITA SCRUTINY ADVISORY GROUP - WORK PROGRAMME 2013/14**

Submitted: Report of the Policy and Information Officer (previously circulated and a copy attached to the Official Minutes).

Members considered the work programme as circulated and agreed the suggested programme for 2014. Any request for additional items was to be forwarded to K Christon.

RESOLVED - That the Work Programme be noted.

30. **DATE AND TIME OF NEXT MEETING**

The next meeting was scheduled for 16 January 2014, 1.00pm at Sunderland Civic Centre.

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Cllr D Wood
Chair
Tyne & Wear ITA
c/o Newcastle City Council
Civic Centre
Newcastle upon Tyne
NE1 8QH

Dear Cllr Wood,

Bus Strategy Delivery Project – response of Tyne & Wear ITA Scrutiny Advisory Group

Thank you for attending the Scrutiny Advisory Group meeting last week and providing us with further details of the proposed Quality Contract Scheme and an update on the next steps.

Having discussed the proposals in more detail, members agreed to unanimously support the Quality Contract Scheme proposal, as the best opportunity for the ITA to maintain a long-term viable bus service for Tyne & Wear; and to seek opportunities for service improvements and route growth that will benefit our residents and commuters.

For your information, I have summarised below some of the comments raised by members during our discussion:

- Members expressed concern about the changes to bus services over recent years, including the withdrawal of some services when they are deemed to be not profitable by the bus operator ie less populated routes or evening services. As a transport service that many communities depend on, particularly residents who rely solely on public transport to access essential services, the advisory group is keen that the network is based on need. We anticipate that the ITA will seek to ensure that future procurement and delivery of bus services is based on this ethos; so that we can see some real improvements to the overall delivery of services.
- Members are concerned that the current fare structure is both difficult to understand and is not as integrated with the wider transport network as it could be. Many other UK and European cities seem to be ahead of Tyne and Wear in this respect. The group therefore welcomes proposals for a simplified fare structure as set out in the Quality Contract scheme; and the introduction of integrated Smartcards, which the group would like to see in place as soon as possible.
- Members highlighted the ticket difficulties faced by those passengers with a Tyne & Wear wide travel ticket, when they wish to travel into neighbouring areas ie Northumberland, Durham, Hartlepool. The group recommends that the ITA reviews the proposed ticketing system to consider how it could be designed to eliminate cross-boundary problems; but also to 'future proof' the scheme in the event of changes that may result from the introduction of a Combined Authority.
- The group noted that under the proposed Quality Contract Scheme the majority of current fares will reduce or stay the same; and that, subject to exceptional or unforeseen costs, fares will increase no more than the rate of inflation each year.
- Members were keen to understand the ticket zone proposals and discussed the variances in ticket prices that may arise for passengers who live one stop beyond a zone boundary. It was noted that any zone ticket scheme of this nature would have these anomalies but the

group recommend that the ITA endeavour to ensure that the scheme is designed in such a way as to provide, as far as possible, a fair and equitable ticket system for all users.

- Members were pleased to receive your assurance that older and disabled people who are currently eligible for free travel with an ENCTS card, will continue to be carried free of charge and that this will be further developed to integrate with the Metro, Ferry and local rail for a £25 annual free. Members were also interested to hear that the ITA will be looking at options for young people, which will take into account that still in full-time education up to the age of 18.
- Should the ITA ultimately agree to progress with proposals for a Quality Contract Scheme, members recommend that the ITA commission the design of a tendering process that will ensure all bus operators wishing to participate are able to do so. This includes local operators who may only operate across small geographical areas and taxi operators who may wish to tender to provide local and evening services.
- Members are also keen that in development of a new service, the ITA factors in improvements in vehicle standards, including the introduction and use of low carbon emission buses, particularly when older buses are phased out.
- Members are concerned about the lack of general awareness by the public on the two proposals considered by the ITA, including the current consultation on the Quality Contract Scheme. The group recommend that the ITA consider further publicity on the proposed approach, perhaps providing information on bus shelters at key transport interchanges, so that a wider group of transport users have the opportunity to feed into the consultation process.

The group noted that the Quality Contract Scheme proposes 'simple and clear integrated information' as part of its quality improvements. You may be interested to know that the Scrutiny Advisory Group has recently established a task & finish group looking at better provision of information to passengers and we would welcome the opportunity to report to the ITA on this early in the New Year.

Finally, we would like to accept your offer to attend our next meeting, which is scheduled for 16 January at 1pm in Sunderland, to provide us with an update on progress.

I have copied this letter to the Director General at Nexus in order that it can be submitted as part of the formal consultation process.

Yours sincerely



Cllr Neville Padgett
Chair, Tyne & Wear ITA Scrutiny Advisory Group

cc Bernard Garner, Director General, Nexus



INFORMATION

DATE: 16th January 2014

SUBJECT: Public Transport Provision for Children

REPORT OF: Director of Finance and Resources, Nexus

Not confidential.

PURPOSE OF REPORT

To provide members with an understanding of the possible cost implications of improving the public transport provision for children and young people in Tyne and Wear and the options currently being proposed as part of the QCS.

RECOMMENDATIONS

ITA Scrutiny Advisory Group is recommended to receive and note the report.

BACKGROUND DOCUMENTS

Briefing note to the ITA Chairman in the matter dated 10th October 2013.

CONTACT OFFICERS

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IMPACT ON OBJECTIVES

To support economic development and regeneration	Neutral
To address climate change	Neutral
To support safe and sustainable communities	Neutral

1	Executive Summary
1.1	A Travel Concession Authority (TCA) can establish concessionary fare scheme arrangements for children and young people as local discretionary concessions under the 1985 Transport Act, and operators are entitled to reimbursement on the same basis as for statutory concessions, as set out in the 1986 Regulations. These state that TCAs should formulate their reimbursement arrangements with the objective that each operator should be financially no better off and no worse off as a result of providing the concession.
2	Introduction and Background
2.1	Making fares for children and young people affordable has the potential to grow patronage; in 2008 the ITA introduced an area-wide, fixed concessionary child fare (at the time, £0.50 single and £1.00 for a day ticket). Total child patronage (regardless of ticket type) is now higher than before the concessionary fare was introduced.
2.2	<p>At present children resident in Tyne and Wear can travel at concessionary child fares all day, every day on all public transport in Tyne and Wear if they have an Under 16 Pop card.</p> <p>Under-16 Pop cards are available to all children resident in Tyne and Wear who are in year 11 and below at school (aged 5 to 15 on the 31st August before the start of the current academic year). The current fares with an Under 16 Pop card are:</p> <ul style="list-style-type: none"> • Single - 60p • Child All-day Ticket (CAT) - £1.10 <p>The only price increase (+10p on each ticket type) since the introduction of the concession was agreed by the ITA in 2012 and was effectively a reaction to operators' pricing of their own commercial products for children: the concession requires Nexus to reimburse operators for the difference between what they take at the fare box and the price of their commercial ticket.</p>
2.3	The age range to which the Under-16 Pop card applies corresponds with the 'Compulsory School Age' set by the Education Act 1995. Legislation now requires all young people to stay in a designated learning environment until the age of 17 from 2013 and the age of 18 from 2015 onwards – termed 'Raising the Participation Age' (RPA). However RPA will not affect the 'Compulsory School Age'; its effect is that a person who ceased to be of compulsory school age but has not yet reached the age of 18 (or have attained a level 3 qualification), is under a duty to participate in education or training.



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	<p>This creates an anomaly, and the report examines whether this situation might be overcome while at the same time improving the overall public transport offer to children and young people by providing them with free travel.</p>
3	How much would it cost to allow 18 years old and under to travel free on a) Metro and b) Buses in Tyne and Wear?
3.1	<p>a) Metro</p> <p>If U19s were allowed to travel free on Metro then the fare revenue that is currently gained from these customers plus any additional costs arising (i.e. for extra resources required) would need to be compensated for. This follows the “no better off, no worse off” principles of concessionary travel reimbursement as set out in DfT guidance.</p> <p>The cost (before additional costs) of allowing U19s to travel free on the Metro has been estimated at around £3m per annum which is around £2.3m above the current cost of the U16 Concession Scheme.</p> <p>However, additional costs would be incurred as the incentive for travel increases and in particular because the passenger loadings in the peak would be likely to rise significantly. This is estimated at around an additional £0.3m (based on DfT reimbursement guidance). This calculation represents a combination of extra Metrocars and additional operating costs, e.g. cleaning, fuel and staffing.</p>
3.2	<p>b) Bus</p> <p>The cost of making all bus journeys free for U19s would also need to be calculated using the “no better off, no worse off” principle.</p> <p>The cost (before additional costs) of allowing U19s to travel free on bus has been estimated at around £12m per annum. This is around £9m above the current cost of the U16 Concession Scheme.</p> <p>However, additional costs would be incurred as the incentive for travel increases and in particular because the passenger loading in the peak would likely soar. This is estimated at around an additional £0.4m (based on DfT reimbursement guidance). This calculation represents a combination of extra vehicles and additional operating costs, e.g. cleaning, fuel and staffing.</p> <p>There would also be a consequential impact on Scholars Services where Nexus would lose an estimated £1m in fare revenue.</p>



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4	How much would it cost to introduce a “Gold Card” type scheme for 18 years old and under on the Metro?
4.1	Producing an estimate for this proposal is significantly more difficult to quantify and needs to be cognisant of the cost of the Gold Card, reduced revenues from what provision currently exists together with the potential take up of the new product. A prudent estimate puts this at around £2m per annum.
4.2	It should however be noted, that the cost of implementing a Metro Gold Card product for U19s is very sensitive to the input values used in determining the estimate i.e. the higher the sales (or the price) the lower the cost of implementation.
5	What concessionary arrangements for children and young people are being proposed under the QCS arrangements?
5.1	A key benefit of the existing Under 16 fare scheme is that the ‘Child All Day’ (CAT) ticket provides multi-modal travel at a fixed price, valid in all zones (though currently limited to Tyne and Wear). Given the success of the Under 16 fare scheme, Nexus is proposing to use the opportunity presented by the QCS to develop ticketing for the 16-18 age group that provides similar benefits. Therefore weekly and 4-weekly multi-trip tickets will be available at fixed prices, for travel on any form of public transport under the ITA’s control, including QCS services operating in Northumberland, Durham and Hartlepool. The 16-18 scheme will be open to all 16-18 year olds, regardless of their home address or educational status. In order to prove entitlement 16-18 year olds will need to apply in advance for a Smartcard (with a photo).
5.2	It is also proposed to broaden eligibility for the current Under 16 fare scheme to be open to anyone of eligible age, regardless of their home address or educational status. In order to prove entitlement for reduced rate fares, children under the age of 16 will need to apply in advance for a Smartcard with a photo. Under 16s with a Smartcard (with a photo) will be eligible to purchase ‘Under 16’ fares for travel on any form of public transport under the ITA’s control, including QCS services operating in Northumberland, Durham and Hartlepool.
5.3	Under the QCS student fares are proposed to be multi-modal and available on a zonal basis, available for the following time periods: weekly, 4-weekly, and termly. To qualify for student fares, customers would need to prove that they are in full-time education in a recognised educational establishment and apply in advance for



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	a Smartcard (with a photo).
5.4	It should be noted that as a possible alternative to the QCS the local bus operators have jointly proposed a voluntary multilateral partnership agreement which amongst other things includes provision for an improved offer for 16-18 year olds. The proposals in the agreement are currently being analysed in order to provide the ITA with information on which to make a decision in regard to which if any of the two options, QCS or VPA, will best deliver the Bus Strategy.
	Potential impact on objectives
	The report is for information only.

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INFORMATION

DATE: 16th January 2014

SUBJECT: Progress Update on Smart Ticketing

REPORT OF: Director of Finance and Resources, Nexus

PURPOSE OF REPORT

To provide ITA Scrutiny Advisory Group with information about progress on the smart ticketing programme.

RECOMMENDATIONS

ITA SAG is recommended to consider and note the report.

BACKGROUND DOCUMENTS

CONTACT OFFICERS

<i>name</i>	<i>email</i>	<i>phone</i>
Graham Robinson	graham.robinson@nexus.org.uk	0191 2033296

IMPACT ON OBJECTIVES

To support economic development and regeneration	Neutral
To address climate change	Neutral
To support safe and sustainable communities	Neutral

1	Executive Summary
1.1	There are two distinct but interrelated projects with regard to the implementation of smart ticketing and Stored Travel Rights (STR) in Tyne and Wear and the North East region.
1.2	The Nexus specific element relates to the Metro ticketing and gating project which includes the introduction of the Pop smartcard ticketing product and the provision of new ticket machines, gatelines and validators at stations.
1.3	The other element relates to the wider regionally based North East Smart Ticketing Initiative (NESTI) project that has involved, amongst other things, the roll-out of smart enabled electronic ticketing machines across all participating local operators and the cross Tyne Ferry, access to smart back office systems, a regional retail network and a regional Card Management System (CMS).
1.4	The NESTI programme is aimed at creating a smart ticketing infrastructure that covers the public transport network in the North East and will allow customers to use a common STR pay as you go product across all participating public transport modes in the North East region.
2	Introduction and Background
2.1	The implementation of smart ticketing is regarded as being critical to improving the travel offer for customers, increasing choice and enhancing convenience for those who use public transport. It should also help improve people's confidence in using the public transport network by giving the assurance that they have the means to pay for their intended journey, and don't have to worry about knowing the fare or having the correct change ready.
2.2	Making smart ticketing work is contingent on having the correct infrastructure in place to provide a retail network and the means to register the start and end of trips in order to make facilities such as pay as you go or other reimbursement arrangements work. This also necessitates significant back-office provision being made in order to process all the transactions involved.
3	Metro Ticketing and Gating
3.1	<p>The Metro ticketing and gating project has involved the successful installation of:</p> <ul style="list-style-type: none"> • 225 Ticket Vending Machines, • 195 Validators, and



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	<ul style="list-style-type: none"> 11 stations being gated, with 2 more being gated by the end of March 2014. <p>87% of Metro customers are now using gate enabled tickets, and live testing of the gatelines has started. Network Ticketing Limited (the provider of multi-modal, multi-operator travel tickets in Tyne and Wear) is now retailing Metro gate enabled season tickets from three of its outlets, with others implementing this range of product shortly.</p>
3.2	At stations the frontline staff have provided assistance to Metro customers during the live testing of the gatelines and this continues. A targeted marketing campaign is also being launched in January 2014 to further increase awareness and educate customers.
4	Pop
4.1	Pop is the brand name for smart travel on the Metro. Around 85,000 active Pop cards are in issue, including 25,000 Under 16 cards: Pop cards are period passes including annual season tickets. In Summer 2014 provision for STR will be available making it possible to travel on a pay as you go basis with Metro customers also benefitting from a 'daily price cap' meaning that multiple journeys on any day will not cost in excess of the day saver product. Discounts for single journeys paid for using a smartcard (as opposed to an old style magnetic stripe ticket) are also being introduced.
4.2	It will be possible to top-up or renew Pop cards online or using the new Metro station based ticket vending machines - the use of these options is increasing, indicating that customers value the convenience offered via electronically enabled transactions. For 2014/15 there will also be the option of using Payzone agent locations as well as the Nexus website to carry out these transactions, which will further add to the choice and convenience for customers.
5	NESTI
5.1	NESTI is a formal collaborative programme of work between Darlington Borough Council, Durham County Council, Gateshead Council, Hartlepool Borough Council, Middlesbrough Council, Newcastle City Council, North Tyneside Council, Northumberland County Council, Redcar and Cleveland Borough Council, South Tyneside Council, Stockton-On-Tees Borough Council. Sunderland Council, Nexus and the Tyne and Wear Integrated Transport Authority. On 18th October 2010 all the North East local authorities signed a Collaboration Agreement formalising their



INFORMATION

	participation in the NESTI programme, following a series of meetings to discuss the local and strategic benefits which delivery of the NESTI programme will achieve.
5.2	<p>The confirmed NESTI programme involves:</p> <ul style="list-style-type: none">• Smart ticket machines being installed on all eligible buses in the North East;• Provision of a back-office system to manage the infrastructure;• A range of ways for customers to buy operators' smart ticketing products and load them to a smartcard, via a regional retail network; and,• A marketing programme to explain the benefits of smart ticketing to customers and encourage them to use it to access public transport. <p>In addition it is intended to implement:</p> <ul style="list-style-type: none">• A Regional STR pay as you go travel product;• A retail network to support the Regional pay as you go product and allow customers to buy operators' smart ticketing products and load them to a smartcard;• Develop options to include the smaller bus operators and regional rail services in NESTI; and,• Expand the use beyond transport with the potential to integrate the cards with Local Authority Services.
5.3	<p>The NESTI programme is in the process of implementing the regional STR pay as you go travel product that will be accepted on public transport across the region. Progress amongst the operators in the NESTI region is good with the exception of Northern Rail where there has been little appetite by the operator to engage and the work required to prepare for the next franchise is now being given priority. The regional STR will be launched in Summer 2014 as part of the Pop pay as you go product.</p>
5.4	<p>A regional retail network will shortly be deployed in order to support the development of the regional pay as you go product by providing customers with convenient sales points to add value to their smartcards. The retail network to allow customers to do this is being implemented through Payzone, providing around 400 locations across the region. A website to allow customers to manage their regional pay as you go product is currently under test and will be launched subject to successful testing.</p>

ITA Scrutiny Advisory Group

Passenger Transport Information Systems Task & Finish Group 13/14

Scope: To review the existing passenger transport information systems for transport in Tyne & Wear (bus, Metro, ferry, taxi, air) and potential for incorporating best practice that could lead to improvements to information for passengers and result in the potential of increased levels of ridership.

Summary note of the findings & recommendations:

Journey planning

- There is a lack of integrated travel information displays that feature timetable information across the bus, Metro and ferry network. The noted exceptions being locations within Sunderland city centre (at Park Lane and Sunderland stations), which display timetable information on bus & Metro services; and Metro & rail services respectively.
 1. **Recommendation: All displays located at key network 'hubs' should include timetable information for linked transport networks ie Central Station display boards should be integrated with the Central Station Metro; Haymarket Bus Station information should be integrated with Haymarket Metro information.**
- With the exception of The Bridges at Sunderland, information displays featuring time table information is only available to people at the point of access to the bus or Metro system itself; and not at key points where people may start their journey.
 2. **Recommendation: the system in place in Sunderland should be rolled out across other nearby locations that have high levels of footfall by users of the network ie shopping centres, sports venues, cultural venues.**
- The information provided by Nexus travel centres was highlighted as being comprehensive and wide-ranging and they were considered to be an asset to the network. However, signage to them and external information on the service they offer within was found to be limited. This was considered to be particularly important for visitors to the area, who will have limited knowledge of the network and the services available.
 3. **Recommendation: ITA to consider how signage to the offices could be improved and how external displays could more clearly show the range of services they offer.**
- There are a significant number of journey planning/information websites carrying passenger information on travel for Tyne & Wear, across a number of different areas. Whilst helpful, the sheer number of websites available can make accessing information time consuming and difficult to understand for the general public. As an example of good practice, the group noted the combined transport website in Manchester.
 4. **Recommendation: ITA to consider how existing websites could be combined under one banner in order to reduce complexity in the system.**

- Real time travel information on the Metro network is available at the point of entry to Sunderland and Park Lane Metro Stations. Real time information at other Metro stations is only available, once a ticket has been purchased and the passenger has gone beyond the ticket barrier and down onto the trackside. It was noted that some stations have display screens on the concourse already, reducing the requirement for significant levels of further investment.

5. Recommendation: All Metro stations should display real time information at the point of entry to the station.

- The ability to provide real time information in the event of a major incident or extreme event that causes severe disruption to the transport network was particularly highlighted. These events have a major impact on all users, but the impact is exacerbated for disabled users who may be unable to access appropriate (face-to-face) information to help them make immediate changes to their journey. Providing real time information can be particularly reassuring for disabled users, but is also greatly valued by anyone anxious about how long they may have to wait or unsure how they will get to their destination.

6. Recommendation: the ITA should develop an emergency planning procedure that takes into account the particular needs of disabled groups when providing real-time information. This could include staff manned 'help points' for disabled travelers, at key locations throughout the network.

- For some people living in isolated urban and rural areas, where services are limited, access to real-time information can be particularly important; more so during periods of severe disruption, as referred to above. It is recognised that there are significant financial implications to providing infrastructure for real time information at all public transport stops. However, where digital screens already exist, particularly at bus stations, displaying timetable information; the goal should be to move towards real-time information. For outlying areas, there may be opportunities to provide a telephone number for assistance or a help button linked to a manned office, for travelers in need of assistance.

7. Recommendation: the ITA move toward establishing a system of real time information at central locations and support to allow people to access assistance, from outlying areas. And that the longer term objective of providing real time information at all bus stops, similar to Transport for London, is retained.

- It is accepted that travel information cannot be designed in such a way that it will meet the needs of all passenger groups. But there are a number of widely accepted approaches that could be adopted, to take into account the requirements of the largest group of disabled users as possible. This includes: printing in standard Arial 14 font; printing in bold where possible; printing on a background that is only white or yellow; and siting display boards low enough that wheelchair users can use them. There may also be options for information to be displayed pictorially, which would also help those traveling with language barriers.

8. Recommendation: the ITA should establish a standard approach to the design of information, with a focus on keeping information plain and simple at all times. When making significant timetable changes, it may be helpful to consult with local support groups ie Newcastle Disability Forum, The Elders Council.

- It was noted that bus passengers with visual impairment find it particularly helpful to have buses painted in livery according to their route, as it highlights the bus to the passenger as it approaches, usually well in advance of the stop. When added to the introduction of audio and visual “next stop” announcements on board the bus, it will enable blind and partially sighted customers to travel more confidently and independently.

9. Recommendation: the ITA to consider future livery of bus services, in the context of any changes as a result of implementation of the Quality Contract Scheme/Voluntary Partnership Agreement. And to ensure roll out of audio and visual stop information throughout the fleet as soon as possible.

- Given the ageing demographic of our population, we know that the number of people with a cognitive impairment, learning disability and/or mental health problem is affecting a growing number of people, encompassing a range of conditions from autism to age-related dementia and stroke. For many of these people using transport and understanding travel information, can be a challenging experience. There are practical steps that could be taken to support this group of travelers to access travel information and cope in a constantly-changing environment. A key element of this is appropriate training for transport staff so that they can recognise people who may need help and provide appropriate level of information and assistance. But there may be other areas that the ITA can consider, particularly in the design of published information.

10. Recommendation: the ITA should review further what practical action could be taken to support this user group.

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