



## Tyne and Wear Integrated Transport Authority - Metro Sub Committee



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Meeting to be held on Thursday 8 November 2012 at 10.30 am in a Committee Room, Civic Centre, Newcastle upon Tyne

Membership: Blackburn (Vice-Chair), Curran, Hobson, Hodson, Lott, Stokel-Walker, Stone and D Wood (Chair)

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This agenda is available at [www.twita.gov.uk](http://www.twita.gov.uk)

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### AGENDA

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<b>1. Apologies for absence</b>	
<b>2. Declarations of Interest of Members or Officers in any matter to be discussed at the meeting</b>	
<p>(If any Member has a personal or prejudicial interest, please complete the appropriate form and hand this to the Democratic Services Officer before leaving the meeting).</p> <p>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.</p>	
<b>3. Terms of Reference (for information only)</b>	<b>1 - 2</b>
<b>4. Minutes of the Previous Meeting</b>	<b>3 - 8</b>
<b>5. Analysis of Programme to Date</b>	<b>9 - 12</b>
<b>6. 2012/13 Metro ARP and Major Projects Capital Programme - Second Quarterly Review</b>	<b>13 - 28</b>
<b>7. Possession and Key Facilities Closure Plans 2012-13 Plan</b>	<b>29 - 38</b>

<b>8.</b>	<b>Quarterly Performance Data - Quarter 1 &amp; 2 2012/13 - Metro Operating Concession</b>	<b>39 - 44</b>
<b>9.</b>	<b>Metro Customer Satisfaction Survey Results - May 2012</b>	<b>45 - 54</b>
<b>10.</b>	<b>High Voltage Electricity Consumption on Metro</b>	<b>55 - 70</b>
<b>11.</b>	<b>Date and Time of the Next Meeting</b>  Thursday, 10 January 2013 at 10.30am.	
<b>12.</b>	<b>Exclusion of Press and Public</b>  Exclusion of Press and Public under section 100A and Schedule 12A Local Government Act 1972 because exempt information is likely to be disclosed and the public interest test against disclosure is satisfied.	
<b>13.</b>	<b>Confidential Minutes of the Previous Meeting</b>	<b>71 - 72</b>
<b>14.</b>	<b>Quarterly Performance Data - Quarters 1 And 2 2012/13 - Metro Farebox Income</b>	<b>73 - 76</b>



**Tyne and Wear  
Integrated Transport Authority  
Metro Sub-Committee**

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## **Terms of Reference**

This will be a formal advisory sub-committee of the ITA, to meet 4 times a year, with the following terms of reference:

1. To monitor progress and delivery of the Tyne and Wear Metro “Concession Agreement” between Nexus and DB Regio Tyne and Wear Limited.
2. To review service standards and fare setting policy in relation to the Tyne and Wear Metro.
3. To monitor progress and delivery of the Metro Asset Renewal Plan.
4. To make any report, comments or recommendations to the ITA or Nexus in relation to any of the above matters as it considers appropriate from time to time.
5. To lead consultation with strategic partners on long term development planning for the Metro system.
6. Members of the Sub-Committee will have substitute members: five named substitutes for the majority political group to be listed in priority order so that the second will only be called on if two existing group members of the Sub-Committee are unable to attend and so on, one named substitute from the Liberal Democrats and one substitute member for the Conservative group. This ‘priority’ arrangement means that the first substitute member will be used more regularly, giving more consistency and continuity.

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## Tyne and Wear Integrated Transport Authority - Metro Sub Committee

12 July 2012  
(10.30 am - 12.20 pm)

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### **Present:**

Councillor: D Wood (Chair)

Councillors: Blackburn, Curran, Hobson, Hodson, Lott and Stokel-Walker

### **In attendance:**

K Mackay	- Director of Rail and Infrastructure, Nexus
J Fenwick	- Director of Finance and Resources, Nexus
T Hughes	- Director of Customer Services, Nexus
R McClean	- Deutsche Bahn Tyne and Wear Ltd (DBTW)
V Miller	- Democratic Services, Newcastle City Council

### **51. APOLOGIES FOR ABSENCE**

Councillor Stone.

### **52. DECLARATIONS OF INTEREST OF MEMBERS OR OFFICERS IN ANY MATTER TO BE DISCUSSED AT THE MEETING**

Councillors Blackburn, Curran, Hobson, Hodson, Lott, Stokel-Walker and D Wood declared a personal interest due to holding a concessionary travel pass.

### **53. MINUTES OF THE PREVIOUS MEETING**

The minutes of the previous meeting held on 1 March 2012 were approved as a correct record and signed by the Chair.

### **MATTERS ARISING**

#### **(a) Minutes of previous meeting**

**Matters Arising**  
**Asset Renewal Programme 2012/13 – 2015/16**  
**Analysis of Programme to date**

(Minute 41 (a) refers)

Officers confirmed that information on the safety arrangements at level crossings on the Metro network and also on the details regarding the use of the budget allocated specifically for level crossings would be provided to a future meeting.

**(b) Nexus' activities to make young people safe on Metro**

(Minute 42 refers)

It was confirmed that a visit for members to the Safety Works Centre would be organised in future.

**(c) Delivery of the Metro Asset Renewal Plan**

(Minute 44 refers)

In response to a member's query about the effect of the recent floods on the Asset Renewal Plan (ARP), officers confirmed that whilst there had been some damage incurred by the Metro system, such as, for example, damage to signalling equipment in the Shiremoor area, there had been no significant direct impact on the progress of the ARP.

The Chair on behalf of the Sub-Committee thanked all staff who had been working to help to minimise the effects of the recent storm and resume Metro services.

**(d) Quarterly Performance Report – Quarter 3 2011/12 – Asset Renewal Plan**

(Minute 43 refers)

Officers reported that a response from the Department for Transport (DfT) to Nexus' submission in December 2011 for funding for years 3-6 had not yet been received. Officers also explained the risks associated with any further delays. It was noted that the delay was partially due to the difficulty the DfT had incurred in identifying a partner who could be commissioned to conduct a review of Nexus' approach to the overall Investment Plan, including whether value for money was being achieved.

K Mackay offered to circulate for the attention of new members a report which had been presented to members earlier this year on the delivery of ARP, including how the Metropolitan Rail Grant (MRG) was arranged over the full duration of the programme.

**(e) Quarterly Performance Data – Quarter 3 2011/12 – Metro Operating Concession**

(Minute 45 refers)

**Accidents on escalators**

In responding to a member's query as to the reasons for the relatively high number of accidents on escalators on the Metro system, officers explained that these were not clear. Newcastle University were currently conducting a study on this issue, and the findings would be reported as soon as available. It was also noted that various activities had been undertaken

in attempt to address this issue, including improving signage and encouraging passengers to use lifts.

### **Metrocar 3/4 life refurbishment project**

In responding to a member's question about the safety of the Metro cars given the extent of corrosion that had been identified as part of the Metrocar ¾ life refurbishment project, officers confirmed that there had been no significant issues identified that could compromise the safety of the Metro cars. Members were reassured that all refurbished cars were fully compliant with applicable safety standards before being returned to the system. Although the structural corrosion did not represent an immediate threat to operation and safety, it needed to be addressed. It was also reiterated that the levels of corrosion could not be identified until the car had been stripped down.

## **54. METRO ARP AND MAJOR PROJECTS CAPITAL PROGRAMME - 2011/12 OUTTURN**

Submitted: A joint report of the Director of Finance and Resources and Director of Rail and Infrastructure, Nexus (previously circulated and copy attached to Official Minutes).

J Fenwick presented the report which advised members of the 2011/12 outturn for ARP and Major Projects capital programme.

Amongst the points noted during the ensuing discussion were the following:

- Officers reassured members that the slippage in regard to the Security Review project did not present any significant concerns and that the project would be completed in this financial year.
- It was confirmed that there had been some slippage in regard to the Signalling programme. Officers reassured members that this programme would still be delivered.
- Clarification was provided on the payment arrangements in relation to the 10% of the local contribution, including how it was arranged over the length of the ARP and also the cash flow benefits in Year 2 from deferring the 10% local contribution.
- Officers clarified the overall financial position of the ARP, including the original budgeting, the funding received from the DfT and the expenditure in 2011/12. It was confirmed that the original budgeting had an element of over-programming. It was also confirmed that no funding opportunities had been lost and Nexus continued to work to ensure that all relevant grant entitlement was claimed. In response to a member's comments on the presentation of the budget and expenditure figures, officers undertook to ensure that future reports provided an improved presentation.
- An update was provided on the progress made on the Ticketing and Gating programme which was on time and in line with the progress reported to the ITA in May 2012.

- In response to a member's question, J Fenwick confirmed that Nexus' budget controls were satisfactory and that the programme would be delivered as required. It was noted that Nexus were audited independently by the Audit Commission who were satisfied with Nexus' budget control arrangements. Officers explained the technology used by Nexus for the purpose of financial forecasting, monitoring and project management. Officers also explained the 4-weekly reporting arrangements to Nexus' Board and the DfT.
- It was confirmed that Mazars would shortly replace the Audit Commission as Nexus' external auditor.
- It was confirmed that all contracts in relation to escalators and lifts went through the tendering process and, therefore, their cost was driven by the market conditions. Officers would provide information to a future meeting to clarify this.

**RESOLVED** – That: the provisional outturn for the 2011/12 Capital Programme be noted.

#### 55. **ANALYSIS OF PROGRAMME TO DATE**

Submitted: A joint report of the Director of Finance and Resources and Director of Rail and Infrastructure, Nexus (previously circulated and copy attached to Official Minutes).

J Fenwick presented the report which was intended to provide assurance regarding the overall financial standing of the ARP as at the end of the second year (March 2012) of the programme.

During the ensuing discussion, it was noted that:

- addressing climate change was one of the overall objectives of the programme;
- a report to clarify the electricity costs would be provided to a future meeting. As an update, R McClean gave examples of the initiatives undertaken by DBTW to ensure efficient consumption of electricity. These included changes made to the driver's operational processes, improvements to the efficiency of the depot-based electricity consuming activities and systems and also improvements brought by the ARP. A member suggested that consideration should also be given to investigating alternative sources of energy for the Metro network. With regard to the depot, the Chair suggested that, as an option, members could visit the depot as part of their forthcoming annual inspection and tour;
- further information on the approach used for investment in level crossings would be presented to a future meeting.

**RESOLVED** – That the report and comments made be noted.

#### 56. **2012/13 METRO ARP AND MAJOR PROJECTS CAPITAL PROGRAMME - FIRST QUARTERLY REVIEW**



Submitted: A replacement joint report of the Director of Finance and Resources and Director of Rail and Infrastructure, Nexus (previously circulated and copy attached to Official Minutes).

It was noted that the report had replaced the originally circulated report and now included Appendix B which presented budgetary position of individual projects of the 2012/13 Capital Programme, as at the end of Period 3.

J Fenwick and K Mackay presented the report which advised members of the overall performance of the 2012/13 Metro and Major Projects Capital Programme, including their delivery to the end of the first quarter ending 23 June 2012.

**RESOLVED** – That:

- (i) the budget changes identified during quarter 1 as outlined in Section 2 be noted;
- (ii) the position with regard to the 2012/13 Capital Programme at the end of quarter 1, as per Appendices A and B be noted.

**57. POSSESSION AND KEY FACILITIES CLOSURE PLANS 2012-13 PLAN**

Submitted: A joint report of the Director of Finance and Resources and Director of Rail and Infrastructure, Nexus (previously circulated and copy attached to Official Minutes).

K Mackay presented the report on the changes to the possession and key facilities plans for 2012/13.

Clarification was provided on the complexity of works to the Front Street Bridge at Monkseaton station, a bridge used by a number of utility companies. The completion of works on utilities was required before the bridge renewal could commence; the timescale for the start of the bridge renewal was currently January 2012 - February 2013. Members expressed concerns with regard to this timescale and urged that progress should be made sooner if possible. In response to a member's query whether there had been any financial implications of the delays, it was confirmed that there had been some impact on the already existing financial pressures.

**RESOLVED** – That the report and comments made be noted.

**58. QUARTERLY PERFORMANCE DATA - QUARTER 4 2011/12 - METRO OPERATING CONCESSION**

Submitted: A report of the Director of Customer Services, Nexus (previously circulated and copy attached to Official Minutes).

T Hughes presented the report which informed members of the performance of the Metro operating concession arrangements for the period 11 December 2011 to 31 March 2012 (Periods 10, 11, 12 and 13).

In response to a member's comment in relation to how the delay in the Metrocar 3/4 life refurbishment programme could be addressed, officers explained that changing the sub-

contractor was not a preferred option due to the specialist nature of the works. It was noted that members would be kept informed about progress of this matter.

**RESOLVED** – That the report be noted.

59. **DATE AND TIME OF THE NEXT MEETING**

Thursday, 8 November 2012 at 10.30am.

60. **EXCLUSION OF PRESS AND PUBLIC**

**RESOLVED** – That by virtue of paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 the press and public be excluded from the remainder of the meeting due to the likely disclosure of commercially sensitive information.



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REPORT FOR INFORMATION

**DATE:** 8 November 2012

**SUBJECT:** ANALYSIS OF PROGRAMME TO DATE

**REPORT OF:** JOINT REPORT OF DIRECTOR OF FINANCE AND RESOURCES AND  
DIRECTOR OF RAIL AND INFRASTRUCTURE , NEXUS

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Not confidential

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## PURPOSE OF REPORT

To provide assurance regarding the overall financial standing of the ARP as at the end of the second quarter of the third year of the eleven year programme (September 2012).

## RECOMMENDATIONS

The ITA Metro Sub Committee is recommended to note the improved position as outlined in the report.

## BACKGROUND DOCUMENTS

Analysis of Programme to Date – January, July 2012

Financial analysis spread sheet: Year 3 to 6 Programme (Analysis) 10 10 12

## CONTACT OFFICERS

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## IMPACT ON OBJECTIVES

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

## 1 Executive Summary

This report sets out the overall financial standing of the ARP as at the end of the second quarter of the third year of the eleven year programme (September 2012).

## 2 Introduction and Background

2.1 An analysis of financial performance to date has formed part of our submission to DfT for years 3 to 6 of the ARP.

This analysis compares the total estimate for schemes that were scheduled to **commence** during the first three years of the ARP programme with what is now likely to be delivered. This analysis by necessity includes some expenditure in years four and five for projects that carry on beyond year three.

This analysis indicates that the initial work bank is now likely to cost slightly in excess of the original estimate. This is illustrated at asset category level in the following table:-

Asset Category	Initial PID Estimate £000	Current Projection £000	Variation £000
Civils	20,250	29,578	9,328
Permanent Way	28,581	33,577	4,996
Overhead Line	0	452	452
Stations	11,370	20,114	8,744
Communications	9,123	12,767	3,644
Signalling	15,146	15,084	-62
Level Crossings	4,739	464	-4,275
Plant	2,500	3,376	876
Mechanical/Electrical	7,439	6,991	-448
Power	832	1,342	510
Metro Cars	12,181	14,167	1,986
Depot Equipment	3,329	2,167	-1,162
Capital Maintenance	11,520	9,427	-2,093
Miscellaneous	4,000	1,637	-2,363
Project Management	8,161	-767	-8,928
Capital Slippage	5,027	0	-5,027
Major Projects	2,500	2,142	-358
<b>Total</b>	<b>146,699<sup>1</sup></b>	<b>152,518</b>	<b>5,820</b>

<sup>1</sup> Adjusted for Central Station and IP Network projects



What the table shows is that whilst there are some large variations relating to individual asset categories, there are a range of factors that need to be borne in mind when interpreting this:-

- Capital Slippage, which was identified towards the end of the year prior to the implementation of the ARP has been allocated across the most appropriate asset category. In particular, two projects were included in the work bank which were not previously included in the first PID submission to DfT. These two projects alone (Monkseaton Station Ramp and Benton Station Footbridge) totalled approximately £3m.
- The Station Investment Programme has been significantly affected by works at North Shields station where numerous problems have been encountered which has effectively led to a complete demolition and rebuild as opposed to the original plan which was to refurbish the station.
- Civils works have borne the brunt of the capital slippage referred to above and in addition, asset condition has generally been poorer than anticipated in relation to ducting and cable replacement and particularly earthworks.
- The track renewal programme has suffered from higher than anticipated tender prices and additional works arising because asset condition has again been worse than expected e.g. at Howdon viaduct.
- The approach to investment in level crossings has changed significantly and rather than investing £4.739m, we will be investing £0.464m instead.
- Capital maintenance activities have been pared back in order to create some additional headroom and this will be reviewed further as investment continues and less reactive maintenance is required in those geographic areas that have been dealt with.
- The ¾ life refurbishment project has encountered worse than anticipated corrosion and wiring problems.
- The opportunity to value engineer the depot wheel lathe has resulted in a saving of £0.5m against budget.
- Project Management costs have been attributed to the individual projects within the asset categories.



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REPORT FOR INFORMATION

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| 2.2 | In overall terms the pressure on the work bank is now estimated at approximately £5.8m or 4.0%, which is an improvement (from £6.0m or 4.1%) since the last review after two years of the eleven year programme. The reasons for these pressures have been recognised moving forward within the second iteration of the PID covering years 4 to 6. In this regard, it is vital that further efficiencies in delivering the ARP are identified such that this overspend can be contained within approved funding levels. Although the second PID is in its early stages, there is currently a projected underspend identified of £0.2m to date.  |
| 2.3 | As asset knowledge improves over time this will have an impact on the prioritisation of the individual schemes that make up the work bank. Value engineering can also impact on the scope and timing of individual projects. This underlines the dynamic nature of the ARP programme. The DfT approval letter recognises this and is why each individual year of the programme is submitted for approval during the prior year.   |
| 2.4 | In addition, building on the Nexus Rail Consolidation Action Plan that resulted from a 'lessons learned' review instigated by the Director General following completion of Year 1 activity, and having recently refined stage gate review processes, it is apparent that a greater emphasis on cost estimation, project and programme management and ultimately cost control is manifesting itself in the way that the ARP is being delivered. Similarly, as outlined above, increased asset knowledge and more accurate (and earlier) forward planning are assisting in determining a clearer vision of future funding requirements. The point about the gathering of better asset knowledge cannot be understated as we move from a programme that was initially largely based upon asset age as a proxy for condition to one that is based more upon intrusive survey work and a much more informed understanding of what the issues actually are. |

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**3 Next Steps**

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| 3.1 | The overall financial standing of the ARP programme will continue to be monitored and reported to this Sub Committee on a quarterly basis. |
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**4 Potential impact on objectives**

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| 4.1 | There are no adverse impacts on objectives as a result of this report. |
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REPORT FOR INFORMATION

**DATE:** 8 November 2012

**SUBJECT:** 2012/13 METRO ARP AND MAJOR PROJECTS CAPITAL PROGRAMME -  
SECOND QUARTERLY REVIEW

**REPORT OF:** JOINT REPORT OF THE DIRECTOR OF FINANCE AND RESOURCES AND  
DIRECTOR OF RAIL AND INFRASTRUCTURE, NEXUS

**Not confidential**

## PURPOSE OF REPORT

To advise Members of the overall performance of the 2012/13 Metro and Major Projects Capital Programme including delivery to the end of the second quarter (ending 15 September 2012).

## RECOMMENDATIONS

The ITA Metro Sub Committee is asked to:

- note the budget changes identified during quarter 2 as outlined in Section 2
- note the position with regard to the 2012/13 Capital Programme at the end of the second quarter, as per Appendices A and B.

## BACKGROUND DOCUMENTS

Metro Capital Programme 2012/13 – January 2012

First Quarterly Review – July 2012

## CONTACT OFFICERS

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## IMPACT ON OBJECTIVES

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

## 1 Executive Summary

- 1.1 This report sets out the overall performance of the 2012/13 Metro and Major Projects Capital Programme including delivery to the end of the second quarter (ending 15 September 2012).

## 2 Introduction and Background

The ITA approved a Metro Asset Renewal Programme for 2012/13 in January 2012 totalling £46,007k. This reflects the programme which has been submitted and agreed by DfT.

Following finalisation of the 2011/12 outturn, major projects (Ticketing and Gating) have been included within the 2012/13 programme, totalling £7,225k, bringing the total Metro ARP and Major Project programme to £53,232k.

Delivery of the Metro ARP is reviewed on a 4 weekly cycle by the Nexus Executive. At the end of the first quarter of 2012/13, the Metro and Major Projects capital programme was revised to a new level of £49,535k, which was noted by the Sub Committee at its meeting in July.

Since Quarter 1, further budget changes totalling £662k have been identified during Quarter 2, bringing the revised budget to £50,197k. An analysis of these variations is included below:

Description	£000
Acceleration of lift and escalator projects into 2012/13 from future years	2,004
Ducting Master Plan Slippage from 2012/13 to future years	(760)
Redistribution and rescheduling of 4 station projects	(890)
Other	308
<b>Total</b>	<b>662</b>

An explanation of these changes in Quarter 2 is outlined below.

Following slippage in the programme, options were developed to bring forward projects from future years, in particular the acceleration of lift and escalator projects into 2012/13 from future years.





REPORT FOR INFORMATION

In addition, there has been further slippage to the Master Plan programme of Ducting, Signalling and Fibre Pulling works across the network as efforts have continued to reduce costs by internalising the works and reducing the impact upon the Metro Service.

Efforts have also continued to contain station refurbishment costs which have resulted in re-phasing of projects.

The proposed revised programme currently reflects over-programming of approximately 4% to ensure that Metro Rail Grant funding from DfT is maximised. The programme will continue to be carefully monitored to ensure projects are progressed to maximise funding available and efficiency of delivery.

The level of over-programming has reduced since the original programme was agreed. Options to bring forward projects from future years into the current financial year have now been largely exhausted.

Appendix A indicates that, as at the end of Period 6 (15 September 2012), Nexus is currently forecasting expenditure to the end of 2012/13 of £47,265k which includes £7,225k for Major Schemes (Appendix A). Of this amount, £40,040k relates to the Metro Asset Renewal Plan. Whilst this forecast is below the revised Metro Asset Renewal Plan budget of £42,972k, the forecast remains within funding tolerances as approved by DfT forecast expenditure for the year.

Appendix B illustrates this in more detail, at individual project level. What is important to understand is that the £2,932k under spend against forecast is mainly accounted for by slippage but that there are other reasons for the variance, ranging from bringing forward (accelerating) expenditure from future years to budget pressures, offset by budget reductions as the following table illustrates:

	£m
<b><u>Reason for Variation (P6 Forecast v Latest Budget)</u></b>	
C/Fwd slippage into next year	-3.5
B/fwd (accelerated) from next year	0.6
Budget Saving	-0.4
Budget Pressure	0.4
<b>TOTAL</b>	<b>-2.9</b>



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As at the end of the second quarter actual spend is £18,299k (36.5%) for Metro ARP and Major Projects. This, together with estimated commitments, brings the total to £22,604k (45.0%).

Wherever possible, any budget pressures have been managed by value engineering to ensure projects remain within approved budget levels. This is particularly the case with station refurbishments, where value engineering has caused delays in implementation although all planned works are still going ahead.

**3 Metro Ticketing and Gating**

The Metro Ticketing and Gating project has a budget and projection of £7,225k at Quarter 2. There is no use of MRG funding towards this project in 2012/13, with all costs proposed to be funded from S31 funding as agreed with DfT.

**4 Capital Programme Financing**

The following table explains how the Metro ARP and Major Projects capital programme for 2012/13 is to be funded. Given the current forecast, the over-programming level is not anticipated to be required. Options to bring forward elements of future years' programmes continue to be investigated, but options for acceleration are now largely exhausted.

	Available Funding in 2012/13		Projected Funding in 2012/13	
	£000	£000	£000	£000
<b>Asset Renewal Plan</b>				
<b>Metro Rail Grant</b>				
2012/13 Allocation	35,000		35,000	
c/f from 2011/12	2,285		2,285	
Grant acceleration in 2011/12	-3,485		-3,485	
<b>Local Contribution</b>				



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LTP Minor Schemes (including postponed contribution from 2011/12)	5,350		5,350	
ITA Reserves	2,278	<b>41,428</b>	2,278	<b>41,428</b>
<b><u>Major Schemes</u></b>				
S31 Grant		<b>7,225</b>		<b>7,225</b>
<b><u>Over-programming</u></b>				
MRG virement from 2013/14	1,390		-1,249	
Local Contribution 10% reserve	154		-139	
Other Reserves	0	<b>1,544</b>	0	<b>-1,388</b>
<b>Total Nexus Funding</b>		<b>50,197</b>		<b>47,265</b>

**5 Next Steps**

The programme will continue to be monitored throughout the financial year and reported to this Sub Committee on a quarterly basis.

**6 Potential impact on objectives**

There are no adverse impacts on objectives as a result of this report.

Asset Category	Original Approved 2012/13 Budget*		Latest Budget 2012/13		Actual Expenditure at end of Period 6		Forecast for year (as at Period 6)		Variation between Forecast and Latest Budget		Reason for Variation
	£	£	£	£	£	£	£	£	£		
Civils	6,664,528	4,126,403	1,217,183	3,716,488	-409,915					Revised programme reflects slippage in Ducting programme to future years although overall costs have been contained within budget	
Communications	4,195,735	1,753,465	819,486	1,654,403	-99,062					Revised programme reflects slippage in Fibre Replacement programme to future years although overall costs have been contained within budget	
Depot Equipment	17,000	86,128	70,076	97,480	11,352						
Level Crossings	120,000	119,195	54,626	119,528	333						
Mechanical and Electrical	2,369,428	4,464,586	609,581	4,225,987	-238,599					Accelerated programme of lifts and escalators now included bringing forward spending from future years	
Metro Cars	5,371,251	7,552,251	1,990,223	7,637,371	85,120					Revised programme incorporates slippage from 2011/12. Work is ongoing to reach agreement regarding revised specification and timescales.	
Miscellaneous	1,467,124	517,496	50,309	510,242	-7,254						
Overhead Line	316,624	365,413	24,750	239,756	-125,657						
Permanent Way	14,746,213	15,376,315	9,732,849	15,396,705	20,390					Budget and Forecast incorporates increased tender costs for Plain Line	
Plant	0	48,900	40,444	696,919	648,019						
Power	561,349	576,224	48,545	576,223	-1						
Signalling	5,382,014	2,421,707	413,555	1,050,185	-1,371,522					Revised programme reflects slippage in Signalling programme to future years although overall costs have been contained within budget	
Stations	4,796,100	5,564,141	2,161,576	4,118,444	-1,445,697					Revised programme incorporates projects accelerated into 2012/13 and re-scoping delays	
<b>Total Approved 2012/13 Capital Programme</b>	<b>46,007,366</b>	<b>42,972,224</b>	<b>17,233,203</b>	<b>40,039,731</b>	<b>-2,932,493</b>						
Major Projects	7,225,000	7,225,000	1,065,632	7,225,000	0						
<b>Total</b>	<b>53,232,366</b>	<b>50,197,224</b>	<b>18,298,835</b>	<b>47,264,731</b>	<b>-2,932,493</b>						

\*Certain associated costs have been reallocated to individual projects since the programme was approved by the ITA in January 2012 to facilitate comparison of the proposed changes to the programme.

2012/13 Capital Programme at end of Period 6

Capital Code	Capital Scheme	Original Approved Budget 2012/13 (PID)		Latest Approved Budget 2012/13		Actual Expenditure at end of Period 6		Forecast for year (as at Period 6)		Variance between Forecast and Latest Approved Budget £	Reason for Variation
		£		£		£		£			
	<b>Civils</b>										
BB001	Central Area Tunnel Refurbishment	6,000		3,089		1,837		2,287		-802	
BC200	Ground Investigation - Tynemouth to Chillingham Road	0		0		0		0		0	
BC201	Earthworks - North Shields to Howdon	408,952		364,387		227,727		276,701		-87,686	
BC202	Earthworks - Howdon to Wallsend	0		1,000		1,799		2,799		1,799	
BC203	Earthworks - Wallsend to Chillingham Road	0		0		307		307		307	
BC204	Earthworks- South Gosforth to Jesmond	55,000		53,142		20,910		53,142		-0	
BC971	Earthworks - TYN-NPK, NPK-SGF	66,124		388,824		14,081		152,762		-236,062	Technical difficulties have resulted in the slippage of spend in 2012/13.
BC205	Bridges - Tynemouth to North Shields	0		0		0		0		0	
BC206	Bridges - Percy Main to Wallsend	141,324		112,069		63,300		110,325		-1,744	



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BC207	Bridges - Howdon to Percy Main	141,324	141,324	89,268	139,855	-1,469
BC208	Bridges - Meadow Well to Walkergate	0	4,000	0	0	-4,000
BC209	Bridges - Tynemouth to Meadow Well	177,924	200,924	170,225	198,808	-2,116
BC210	Bridges - Percy Main to Hadrian Road	0	0	492	492	492
BC211	Bridges - Hadrian Road to Walkergate	105,152	504,200	84,278	506,015	1,815
BC212	Bridges - Wallsend to Walkergate	54,124	54,124	516	54,120	-4
BC213	Retaining Walls	0	0	0	0	0
BC214	Bridges - Monkseaton, Cullercoats	150,124	152,843	3,780	5,182	-147,661
BC966	Cullercoats Bridge		0	0	0	0
BC218	Drainage - Tynemouth (Knotts Flats)	0	0	0	0	0
BC219	Drainage - South Gosforth to Jesmond	51,000	50,640	1,105	41,661	-8,979
BC222	Duct Route - Wallsend to Manors	317,387	301,913	58,489	302,175	262
BC223	Duct Route - Howdon to Wallsend	0	0	-649	-649	-649
BC224	Duct Route - North Shields to Howdon	305,169	445,313	49,973	479,015	33,702
BC225	Duct Route - Tynemouth to North Shields	523,892	221,602	34,921	221,739	137

Slippage into 2013/14. Local consultation has requested that works are not undertaken concurrently.



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BC226	Duct Route - South Gosforth to Jesmond	308,484	24,737	11,780	30,551	5,814
BC227	Duct Route - South Gosforth to Airport	607,881	37,708	31,593	58,493	20,785
BC228	Duct Route - Jesmond to Gatehead Stadium and Manors	447,112	54,946	32,747	54,058	-888
BC229	Duct Route - Gateshead Stadium to South Shields	650,261	283,781	128,495	284,799	1,018
BC230	Duct Route - South Gosforth to Tynemouth	1,557,170	52,043	62,680	94,201	42,158
BC241	Culverts	0	0	0	0	0
BC289	Ground Investigation - South Gosforth to Jesmond	0	0	0	0	0
BC294	Airport Metro Station Drainage	0	0	0	0	0
BC543	QE11 Bridge Refurbishment	0	20,000	16,279	16,279	-3,721
BC545	Depot Refurbishment	0	12,000	11,939	11,939	-61
BC799	Monkseaton Station Ramp	582,124	562,063	65,319	561,948	-115
BC811	Benton Station Footbridge	0	32,617	13,716	24,347	-8,270
BC855	MOG Remodelling	0	3,797	0	0	-3,797
BC883	Depot Lighting Upgrade	0	0	0	0	0
BC887	Earsdon Road Bridge	0	0	0	0	0
BC891	Control Room	8,000	7,653	4,398	9,350	1,697
BC911	Knotts Bridge Repair	0	0	0	0	0
BC914	Benton Lane Bridge	0	0	0	0	0
BC928	North Shields Tunnels COMPLETE	0	0	0	0	0
BC937	Denholme and Mast Lane	0	3,900	3,848	3,848	-52
BC952	Depot Fire Alarm Systems	0	24,229	12,031	19,940	-4,289
BC958	Repairs to 1216A Quayside Arch	0	7,535	0	0	-7,535



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	<b>6,664,528</b>	<b>4,126,403</b>	<b>1,217,183</b>	<b>3,716,488</b>	<b>-409,915</b>
<b>Total Civils</b>					
BC250 Cable Pulling - Tynemouth to Manors	566,603	79,221	14,367	79,482	261
BC251 Cable Pulling - South Gosforth to Jesmond	0	13,000	10,499	10,499	-2,501
BC253 Cable Pulling - Jesmond to Gateshead Stadium and Manors	309,464	37,958	8,722	37,958	0
BC252 Cable Pulling- South Gosforth to Airport	454,987	54,327	18,636	54,327	0
BC254 Cable Pulling - Gateshead Stadium to South Shields	657,050	69,205	28,650	69,204	-1
BC255 Cable Pulling - South Gosforth Junction to Tynemouth	663,457	47,112	18,648	51,423	4,311
BC256 Radio	240,124	240,124	108,210	141,861	-98,263
BC257 Telephony	0	0	0	0	0
BC259 Station Network Connections	1,300,000	1,208,468	610,573	1,208,468	-0
BC556 Help Points	0	0	0	0	0
BC623 CCTV on Metro Cars	4,050	4,050	1,180	1,180	-2,870
BC840 CCTV/PA Access	0	0	0	0	0
<b>Total Communications</b>	<b>4,195,735</b>	<b>1,753,465</b>	<b>819,486</b>	<b>1,654,403</b>	<b>-99,062</b>
BC278 Train Wash	8,500	12,807	23,447	24,158	11,351
BC279 Wheel Lathe	8,500	73,321	46,628	73,321	0
<b>Total Depot Equipment</b>	<b>17,000</b>	<b>86,128</b>	<b>70,076</b>	<b>97,480</b>	<b>11,352</b>
BC275 Barriers - Kingston park	35,000	35,000	25,549	35,001	1





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BC276	Barriers - Fawdon	35,000	34,921	21,174	34,920	-1
BC277	Level Crossings - Highway works - Howdon, Fawdon, Kingston Park	0	1,000	1,334	1,334	334
BC539	Level Crossing Refurbishment	0	0	0	0	0
BC800	LX Road Monitoring	0	0	0	0	0
BC955	Level Crossing Deck Replacement	50,000	48,274	6,569	48,273	-1
	<b>Total Level Crossings</b>	<b>120,000</b>	<b>119,195</b>	<b>54,626</b>	<b>119,528</b>	<b>333</b>
BC281	Escalator - Central	309,576	314,181	34,148	265,596	-48,585
BC282	Escalator - Monument	1,442,576	1,449,115	276,829	1,361,812	-87,303
BC994	Escalator - Regent Centre (previously Manors)	0	678,802	5,753	678,761	-42
BC995	Escalator - Gateshead 4-6	0	785,423	5,783	785,424	1
BC284	Lift - Four Lane Ends	163,576	200,493	106,240	190,235	-10,258
BC285	Lift - Heworth	163,576	199,620	106,090	189,653	-9,967
BC286	Fire Alarm	166,124	166,124	20,913	165,111	-1,013
BC532	Stations Refurb - Esc Imps/Major Items	60,000	66,889	35,597	66,951	62
BC617	Lifts Refurbishment/Major Items	64,000	63,939	0	63,939	0
BC973	Lift - St James	0	217,500	1,905	190,251	-27,249
BC977	Lift - Manors	0	36,000	0	34,448	-1,552
BC984	Lift - Jesmond	0	36,000	0	33,690	-2,310
BC996	Lift - Regent Centre (previously St James)	0	250,500	16,325	200,118	-50,382
BC938	Sub Surface Vent System	0	0	0	0	0
	<b>Total Mechanical &amp;</b>	<b>2,369,428</b>	<b>4,464,586</b>	<b>609,581</b>	<b>4,225,987</b>	<b>-238,599</b>



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<b>Electrical</b>									
BC288	3/4 Life Refurbishment	4,678,251	6,821,942	1,651,144	6,908,000	86,058			
BC954	Capital Maintenance Concession	693,000	693,000	302,708	693,000	0			
BC874	On-Train PA	0	37,309	36,372	36,372	-937			
	<b>Total Metro Cars</b>	<b>5,371,251</b>	<b>7,552,251</b>	<b>1,990,223</b>	<b>7,637,371</b>	<b>85,120</b>			
BB003	Maintenance Management System	0	0	0	0	0			
BC587	Vehicle Replacement Programme	100,000	106,000	13,003	106,000	0			
BC849	Digitising and Approving Engineering Drawings	0	0	0	0	0			
BC894	Security Review	267,124	277,124	18,730	276,911	-213			
BC943	IT Hardware - WASP project	0	9,713	8,803	9,713	-1			
BC947	Nexus Document Control System	0	20,000	0	12,000	-8,000			
BC956		0	0	0	0	0			
BC957	PMO Transition IT Applications	0	3,532	960	4,492	960			
BC959	Land at West Monkseaton Metro Station	0	0	0	0	0			
BC960	Asset Knowledge	100,000	100,000	8,814	100,000	0			
BC961	Rail crane	0	1,127	0	1,127	0			
BC962	Transformer (Benton)	0	0	0	0	0			
BC963	Tunnel Track bed	0	0	0	0	0			
BC965	Regent Centre Asbestos Removal	0	0	0	0	0			
BC001	Asset Knowledge	1,000,000	0	0	0	0			
	Bus Costs		0	0	0	0			
	Dayworks		0	0	0	0			



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	Blockade Resources	0	0	0	0	0
	<b>Total Miscellaneous</b>	<b>1,467,124</b>	<b>517,496</b>	<b>50,309</b>	<b>510,242</b>	<b>-7,254</b>
	<b>Project Management Costs</b>					
	Project Management Costs	0	0	0	0	0
	<b>Total Project Management Costs</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
BC240	OLE - System Development	316,624	365,413	24,750	239,756	-125,657
	<b>Total Overhead Line</b>	<b>316,624</b>	<b>365,413</b>	<b>24,750</b>	<b>239,756</b>	<b>-125,657</b>
BC231	Plain Line - Tynemouth to Chillingham Road	9,157,691	9,841,934	7,541,313	9,688,062	-153,872
BC232	Plain Line - South Gosforth to Jesmond	164,124	264,124	8,230	136,319	-127,805
BC234	Switches & Crossings - Hylton Street	0	0	0	0	0
BC235	Switches & Crossings - North Shields	1,694,826	1,728,874	1,691,047	1,728,875	1
BC236	Switches & Crossings - South Gosforth	2,017,076	2,021,995	80,870	2,409,606	387,611
BC237	Switches & Crossings - Benton	100,124	100,124	3,033	55,307	-44,817
BC238	Switches & Crossings - St James	104,124	104,124	2,633	62,204	-41,921
BC239	Switches & Crossings - Prudhoe Street	104,124	0	154	154	154
BC967	Switches & Crossings - Regent Centre	104,124	104,124	1,520	104,125	1

Projected saving on August Blockade works  
Projected increased efficiency by internalisation of pre contract works previously carried out by contractor  
Increased tender return and anticipated bus costs



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BC550	Rail Grinding	100,000	86,166	11,037	86,166	-0
BC558	Security Fencing	100,000	100,000	1,796	99,999	-1
BC703	Plain Line Renewal	1,000,000	927,443	383,734	927,432	-11
BC706	Switch & Crossing Renewal	0	0	0	0	0
BC714	Tamper Trainstop	0	0	0	0	0
BC905	Wheel Slip Gel Applicators	0	0	0	0	0
BC964	S&C Steelwork Renewal	100,000	97,407	7,481	98,455	1,048
	<b>Total Permanent Way</b>	<b>14,746,213</b>	<b>15,376,315</b>	<b>9,732,849</b>	<b>15,396,705</b>	<b>20,390</b>
BC295	Spider Lift	0	48,900	29,500	49,500	600
BC280	Tamper	0	0	10,944	647,419	647,419
BC517	Road/Rail Vehicles	0	0	0	0	0
	<b>Total Plant</b>	<b>0</b>	<b>48,900</b>	<b>40,444</b>	<b>696,919</b>	<b>648,019</b>
BC287	Power - Depot Stray Currents	27,000	28,000	3,738	28,000	-1
BC929	OHLE Network	534,349	548,224	44,808	548,224	-0
	<b>Total Power</b>	<b>561,349</b>	<b>576,224</b>	<b>48,545</b>	<b>576,223</b>	<b>-1</b>
BC260	Signalling- Bankfoot Interlocking Area	735,706	27,883	14,396	27,883	-0
BC261	Signalling - South Gosforth Interlocking Area	373,350	24,241	9,673	24,238	-3
BC262	Signalling - Benton Interlocking Area	632,758	17,420	7,230	17,418	-2
BC263	Signalling - Monkseaton Interlocking Area	0	0	0	0	0
BC264	Signalling - North Shields Interlocking Area	555,304	23,225	5,671	23,224	-1

Attempts being made to accelerate project. Awaiting tender returns to clarify position.



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BC265	Signalling - Wallsend Interlocking Area	65,000	133,310	36,131	135,373	2,063	
BC266	Signalling - Jesmond Interlocking Area	668,780	28,297	4,922	28,298	1	
BC267	Signalling- Manors Interlocking Area	350,820	29,025	4,548	29,025	0	
BC268	Signalling - Heworth Interlocking Area	662,660	37,647	12,994	37,646	-1	
BC269	Signalling - Pelaw Interlocking Area	697,136	32,753	13,229	32,752	-2	
BC270	Signalling - Jarrow Interlocking Area	42,076	253,049	210,816	218,096	-34,953	
BC271	Signalling - South Shields Interlocking Area	3,124	19,557	2,914	2,914	-16,643	
BC272	Signalling - Depot Interlocking Area	0	0	0	0	0	Contract award delayed until 2013/14 following delays in external designer programme
BC273	Signalling - PT1	529,624	529,624	72,450	124,098	-405,526	
BC274	Future Signalling System	0	0	0	0	0	
BC946	Manors Enhancement Works	0	0	0	0	0	
BC970	Signalling - Replacement point motors (critical locations)	65,676	1,265,676	18,582	349,221	-916,455	Tender returns have indicated difficulties in obtaining points motors this financial year
	<b>Total Signalling</b>	<b>5,382,014</b>	<b>2,421,707</b>	<b>413,555</b>	<b>1,050,185</b>	<b>-1,371,522</b>	
BC242	Station - North Shields	1,639,876	2,172,924	2,133,066	2,328,262	155,338	Increased works carried out by Nexus which it is hoped to recover from contractor
BC243	Station - Meadow Well, Percy Main and Howdon	273,224	93,598	-195,182	-62,479	-156,077	Slippage of works at Percy Main station. Options to internalise work being explored



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BC244	Station - Hadrian Road and WallSEND	192,576	801,609	47,292	801,611	2	
BC245	Station - Walkergate and Chillingham Road	812,624	223,587	63,456	272,076	48,489	
BC246	Station - South Gosforth	957,076	997,595	55,366	248,642	-748,953	Gate lines removed from scope and further value engineering to bring scope within budget has caused delays in programme
BC247	Station - Ilford Road	66,324	86,324	4,652	81,637	-4,687	
BC248	Station - West Jesmond	811,776	845,880	48,094	254,285	-591,595	Gate lines removed from scope and further value engineering to bring scope within budget has caused delays in programme
BC249	Station - Central Station	0	0	650	650	650	
BC968	Halt Station package - HEB, JAR, BDE Design	42,624	342,624	4,181	193,759	-148,865	Design framework tender returns lower than budget
	<b>Total Stations</b>	<b>4,796,100</b>	<b>5,564,141</b>	<b>2,161,576</b>	<b>4,118,444</b>	<b>-1,445,697</b>	
	<b>Total Approved 2011/12 Capital Programme</b>	<b>46,007,366</b>	<b>42,972,224</b>	<b>17,233,203</b>	<b>40,039,731</b>	<b>-2,932,493</b>	
BB005	Sunderland Station Redevelopment	0	0	5,795	0	0	
BB006	Ticketing and Gating	7,225,000	7,225,000	1,059,837	7,225,000	0	
	<b>Total Major Projects</b>	<b>7,225,000</b>	<b>7,225,000</b>	<b>1,065,632</b>	<b>7,225,000</b>	<b>0</b>	
	<b>TOTAL</b>	<b>53,232,366</b>	<b>50,197,224</b>	<b>18,298,834</b>	<b>47,264,731</b>	<b>-2,932,493</b>	



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REPORT FOR INFORMATION

**DATE:** 8 November 2012

**SUBJECT:** POSSESSION AND KEY FACILITIES CLOSURE PLANS 2012-13 PLAN

**REPORT OF:** DIRECTOR OF RAIL & INFRASTRUCTURE, NEXUS

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Not confidential

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## PURPOSE OF REPORT

To update Members of Metro Sub Committee with progress in delivering the yearly possession and key facilities plans for 2012-13.

## RECOMMENDATIONS

That Metro Sub-Committee notes the contents of the report.

## BACKGROUND DOCUMENTS

## CONTACT OFFICERS

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*0191 203 3241*

## 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

To update Metro Sub Committee about the annual possession and key facilities plan for 2012-13 and any key issues arising therefrom.

## 2 Introduction and Background

The table below identifies where a series of possessions for ARP and Maintenance have been completed and/or remain to be completed within the programme for 2012-13. See Appendix A for detail.

Possession Duration	Possessions booked to date 2012-13	Possessions completed 2012-13	Cancelled Possessions	Possessions Outstanding
Blockades	3	1	0	2
54hr	19	4	2	13
29hr	3	1	1	1
12hr	10	0	0	10

## 3 Highlights & Key Issues

### **Blockade Programme (2012-13)**

#### Wallsend to Tynemouth (11 August to 3 September)

During this period some 10.5km of plain line, 4 switch and crossing units, 400m of drainage and 3 bridges were refurbished and/or renewed. The value of work undertaken was approximately £7m with spend being at an average of £300k per day. In total this represents about 18% of the total investment planned for 2012/13.

A significant amount of effort took place to mitigate the impact on local residents. This included reducing the amount of noisy working, lighting and careful concentration of worksites away from residential properties as far as possible. Acoustic barriers were successfully used at a number of locations. The total number of households complaining about noise was reduced by 60% compared to the 2011 Major Line Closure in the same area, with a particularly sharp reduction round the sensitive Limekilns site compound. Work was completed and the possession was handed back on time at 04.30 on Monday 3 September.

See Appendix B for images of the completed work. (Plain line and new train at new station (Meadowell) on new track).

#### South Gosforth Junction (28 October – 3 November)

Since the last report to this committee, considerable work has been done to find ways





of reducing the impact on the customer that this important renewal of South Gosforth Junction will have on our customers. This has resulted in the overall duration being reduced from 9 days to 6 days.

The possession will extend from Longbenton and Regent Centre to South Gosforth. Careful design of the possession arrangements at South Gosforth will allow Metro services to use the station albeit at a reduced frequency. There will be an impact on Metro services across the whole network as a consequence of this work. As with the main possession above, a comprehensive bus replacement service will operate between Regent Centre and Longbenton. A wide-ranging communication plan has made sure passengers and key stakeholders, including the City Council, local councillors, the Airport, sports clubs, employers and local residents are aware of the works and know how to get more information. The work has been timed to coincide with school holidays to reduce the impact on other local services and the highway network.

This is the first time the Metro central corridor has been directly affected for this length of time and accordingly Nexus will be monitoring the arrangements very carefully.

#### Byker to Tynemouth (16 February to 25 February 2013)

This blockade will see the last of the main works being carried out on this stretch of line.

Under this blockade, Wallsend crossover will be renewed, plain line reballasted and realigned, Bridge 1200 (Carville Road) will be subjected to a full deck replacement and new signalling and communication cables installed.

#### **Olympics**

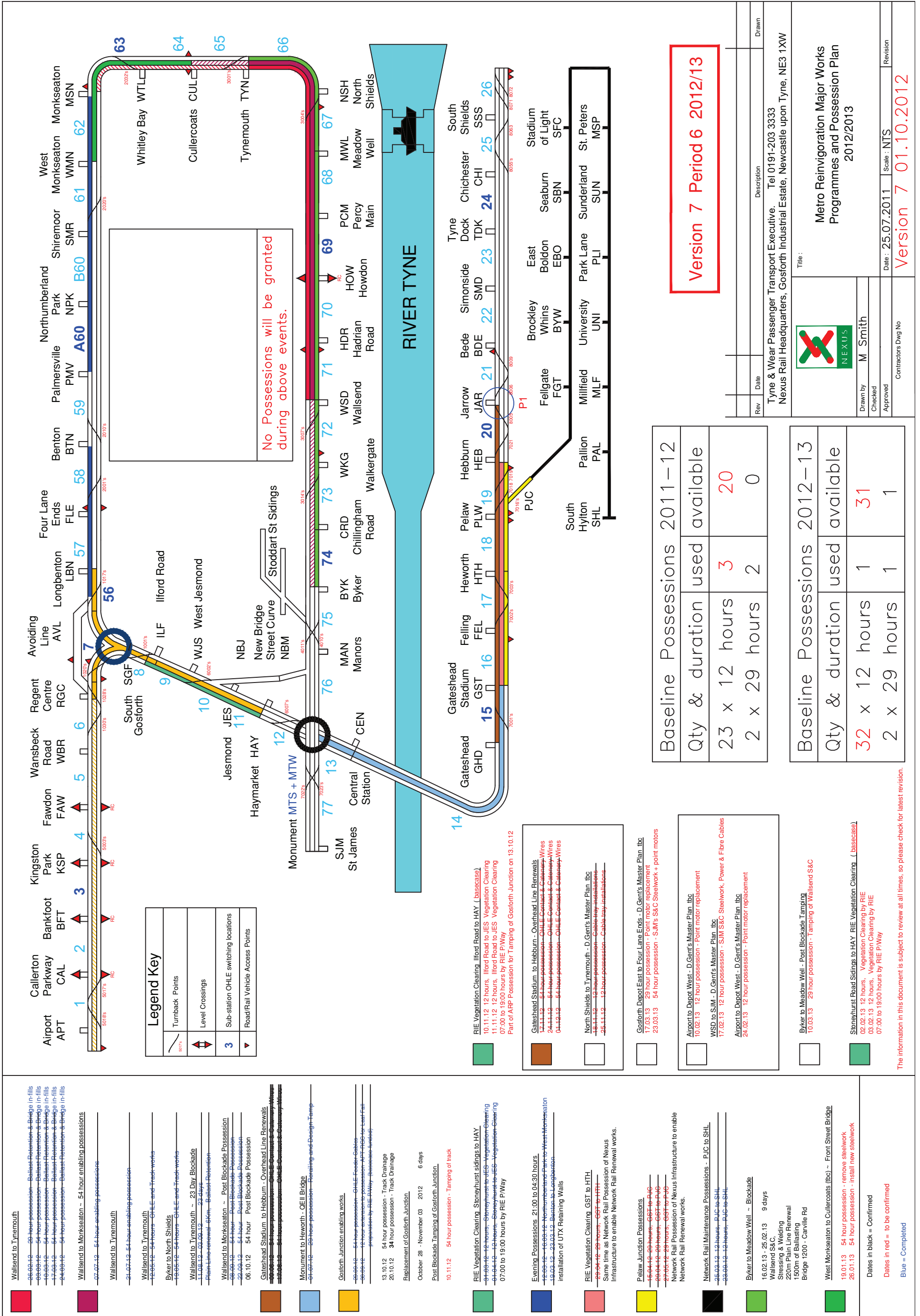
During the Olympic period no possessions were undertaken that could have interfered with arrangements planned for the Torch Relay events, or during the games themselves. This was because of the unprecedented nature of the events and the media and stakeholder focus that they brought to the region, as well as the potentially higher level of patronage, including visitors from other parts of the UK and world. Work on key facilities in city centre, park and ride, and key interchange stations was avoided or minimised for the same reason.

#### **Key Facilities Plan – (Assets out of use for more than 24 hours)**

The escalator refurbishments at Monument Station were re-programmed to avoid conflicting with the Olympic Games and Great North Run events. Revised dates are detailed in the plan attached as Appendix C.

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# ARP Possession/Blockade Year Plan 2012-2013



Legend Key	
	Turnback Points
	Level Crossings
	Sub-station OHLE switching locations
	Road/Rail Vehicle Access Points

No Possessions will be granted during above events.

Version 7 Period 6 2012/13

Baseline Possessions 2011-12	
Qty & duration used	available
23 x 12 hours	3
2 x 29 hours	0

Baseline Possessions 2012-13	
Qty & duration used	available
32 x 12 hours	31
2 x 29 hours	1

	Wallsend to Tynemouth 25.03.12 - 20 hour possession - Ballast Renewal & Bridge in-fills 09.03.12 - 54 hour possession - Ballast Renewal & Bridge in-fills 19.03.12 - 54 hour possession - Ballast Renewal & Bridge in-fills 17.03.12 - 54 hour possession - Ballast Renewal & Bridge in-fills 24.03.12 - 54 hour possession - Ballast Renewal & Bridge in-fills
	Wallsend to Monkseaton - 54 hour enabling possession 02.07.12 - 54 hour enabling possession
	Wallsend to Tynemouth 24.02.12 - 54 hour enabling possession
	Wallsend to Tynemouth 16.05.12 - 54 hours OHLE and Track works 17.05.12 - 54 hours OHLE and Track works
	Byker to North Shields 17.05.12 - 54 hours OHLE and Track works
	Wallsend to Monkseaton - 23 Day Blockade 11.08.12 - 03.09.12 - 23 days 11.08.12 - 03.09.12 - 23 days
	Plain Line renewal - 6km - Ballast Renewal
	Wallsend to Monkseaton - Post Blockade Possession 29.03.12 - 54 hour - Post Blockade Possession 29.03.12 - 54 hour - Post Blockade Possession
	06.10.12 - 54 hour - Post Blockade Possession
	Gateshead Stadium to Hebburn - Overhead Line Renewals 17.03.12 - 29 hour possession - Point motor replacement 23.03.12 - 54 hour possession - SJM's S&C Steelwork + point motors
	Monument to Heworth - OE II Bridge 01.07.12 - 29 hour possession - Retaining and Design Team
	Gosforth Junction enabling works 28.03.12 - 54 hour possession - OHLE, Fencing, Cables 01.04.12 - 54 hour possession - OHLE, Fencing, Cables 01.04.12 - 54 hour possession - OHLE, Fencing, Cables
	13.10.12 - 54 hour possession - Track Drainage 20.10.12 - 34 hour possession - Track Drainage
	Relocation of Gosforth Junction October 28 - November 03 2012 6 days Post Blockade Tamping of Gosforth Junction 10.11.12 - 54 hour possession - Tamping of track
	RIE Vegetation Clearing - Stonehurst sidings to HAY 01.08.12 - 12 hours - Stonehurst to JES - Vegetation Clearing 04.08.12 - 12 hours - Stonehurst to JES - Vegetation Clearing 07.00 to 19:00 hours by RIE P/Way
	Evening Possessions - 21.00 to 04.30 hours 16.03.12 - 16.05.12 - Northumberland Park to West Monkseaton 19.03.12 - 23.03.12 - Benton to Longbenton Installation of UTX Retaining Walls
	RIE Vegetation Clearing - GST to HTH 29.04.12 - 29 hours - GST to HTH Same time as Network Rail Possession of Nexus Infrastructure to enable Network Rail Renewal works.
	Pelaw Junction Possessions 16.04.12 - 20 hours - GST to PJC 20.04.12 - 20 hours - GST to PJC 27.05.12 - 29 hours - GST to PJC Network Rail Possession of Nexus Infrastructure to enable Network Rail Renewal works.
	Network Rail Maintenance Possessions - PJC to SHL 25.03.12 - 12 hours - PJC to SHL 25.03.12 - 12 hours - PJC to SHL 25.03.12 - 12 hours - PJC to SHL
	Byker to Meadow Well - Blockade 16.02.13 - 25.02.13 9 days Wallsend S&C Stressing & Welding 220m Plain Line Renewal 1500m of Ballasting Bridge 1200 - Carville Rd
	West Monkseaton to Cullercoats (b/c) - Front Street Bridge 19.01.13 - 54 hour possession - remove steelwork 25.01.13 - 54 hour possession - install new steelwork

The information in this document is subject to review at all times, so please check for latest revision.



Metrolink  
M. Smith  
Checked  
Approved  
Date : 25.07.2011  
Scale : NTS  
Revision

Version 7 01.10.2012

Tithe :  
Tyne & Wear Passenger Transport Executive, Tel 0191-203 3333  
Nexus Rail Headquarters, Gosforth Industrial Estate, Newcastle upon Tyne, NE3 1XW

Rev	Date	Description	Drawn

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**Refurbished Metrocar at the refurbished Meadowell Station on new track**



**Brewers Lane to Howdon**



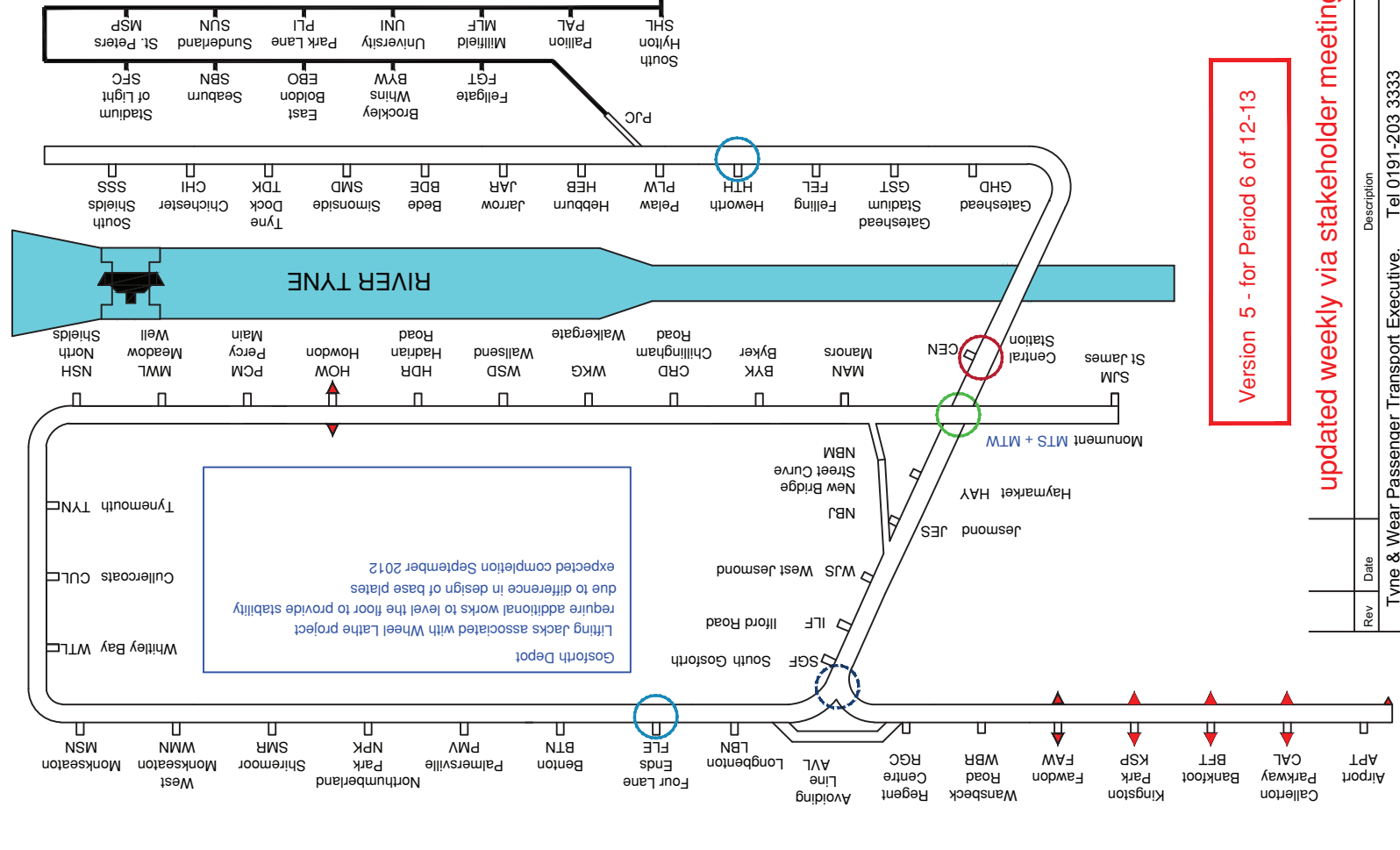
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# Key Facilities Closure Plan 2012-2013

The information in this document is subject to review at all times, so please check for latest revision.

Station/ Location	Facility	Full Station	Platform 1	Platform 2	Platform 3	Platform 4	Escalator 1	Escalator 2	Escalator 3	Escalator 4	Escalator 5	Escalator 6	Lift 1	Lift 2	Depots	Sidings	Level X'ings	Early Closings & Times							Date Closed/ out of use	Date Open/ back in use	Cost Code	s c r i p t i o n	
																		20:00 hrs	Mo	Tu	We	Th	Fr	Sa					Su
Monument Ea/We								Y																		17.09.12	17.12.12	BC282	C
Monument No/So																										17.09.12	05.11.12	BC282	C
Monument No/So								Y																		06.11.12	17.12.12	BC282	C
Monument No/So									Y																	03.01.13	15.03.13	BC282	C
Central Station																										17.09.12	15.12.12	BC281	C
Four Lane Ends																										18.09.12	23.11.12	BC284	C
Heworth Station																										18.09.12	23.11.12	BC285	C



**Legend Key**

- Station / Location by colour
- Level Crossings
- T Tentative
- C Confirmed
- S Slipped

**Key Facilities Closure Plan 2012/2013**

Tyne & Wear Passenger Transport Executive. Tel 0191-203 3333  
 Nexus Rail Headquarters, Gosforth Industrial Estate, Newcastle upon Tyne, NE3 1XW

Drawn by: M Smith  
 Checked by: M Smith  
 Approved by: M Smith

Date: 25.07.2011 Scale: NTS  
 Revision: 5  
 Version 5 01.10.2012

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REPORT FOR INFORMATION

**DATE:** 8 November 2012

**SUBJECT:** QUARTERLY PERFORMANCE DATA – QUARTER 1 & 2 2012/13 –  
METRO OPERATING CONCESSION

**REPORT OF:** DIRECTOR OF CUSTOMER SERVICES, NEXUS

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Not confidential

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## PURPOSE OF REPORT

This is the eighth quarterly report submitted to the Metro Sub-Committee in accordance with the Terms of Reference agreed by the Integrated Transport Authority in May 2010.

## RECOMMENDATIONS

The ITA Metro Sub Committee is recommended to note this report.

## BACKGROUND DOCUMENTS

None

## CONTACT OFFICERS

*Tobyn Hughes*                      [tobyn.hughes@nexus.org.uk](mailto:tobyn.hughes@nexus.org.uk)                      0191 203 3246

## IMPACT ON OBJECTIVES

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

1	<b>Executive Summary</b>
1.1	This report outlines the highlights of the first two quarters of the 2012/13 financial year with regards to the Metro Operating Concession.
2	<b>Introduction and Background</b>
2.1	This report covers the period 1 April 2012 to 15 September 2012 (Periods 1 to 6 inclusive)
2.2	<p>A glossary of terms used in the attached summary report follows:</p> <p><i>Charter Punctuality</i> – DBTW’s measurement of train punctuality; measures the percentage of trains arriving within three minutes later or within 29 seconds earlier than scheduled.</p> <p><i>Concession Agreement</i> – the contract between Nexus and DBTW which governs all transactions and discussions between the two parties.</p> <p><i>DBTW</i> – Deutsche Bahn Tyne and Wear Ltd, the current operator of the Tyne and Wear Metro through the Concession Agreement with Nexus</p> <p><i>EWT (Excess Waiting Time)</i> – the measurement used to calculate punctuality in a high-frequency operation; instead of measuring adherence to timetable, the measurement looks at the number of minutes a passenger is kept waiting above a reasonable threshold.</p> <p><i>Failure</i> – an occasion where the operator did not succeed in meeting its performance criteria on a specific occasion, resulting in a penalty being applied.</p> <p><i>MAA</i> – moving annual average; the average for the past 12 months including the periods being reported on.</p> <p><i>Major Line Closure</i> – a significant possession, leading to a long section of track being unavailable for normal passenger service over an extended time period.</p> <p><i>OPR</i> – Operational Performance Regime; the means by which train service performance is measured in terms of excess waiting time for customers and punctuality of first and last trains.</p> <p><i>Period</i> – 4-week periods (there are 13 in each financial year) used for financial accounting and performance measurement purposes.</p> <p><i>Possession</i> – a period of time when engineering works take place on a section of track, preventing normal passenger service from being provided.</p> <p><i>RIDDOR</i> - The Reporting of Injuries, Diseases and Dangerous Occurrences</p>



REPORT FOR INFORMATION

Regulations 1995 (RIDDOR), place a legal duty on employers, self-employed people and people in control of premises to report to the Health & Safety Executive: work-related deaths; major injuries or over-three-day injuries; work related diseases; and dangerous occurrences (near miss accidents).

*SQR* – Service Quality Regime; the means by which quality standards on stations and trains is measured

**3 Report**

3.1 An agreement was reached for the transfer of car park revenue risk back to Nexus from DBTW. The agreement sees the management of the car parks remain with DBTW although certain maintenance obligations have transferred back to Nexus. Nexus has been running a promotion offering free car parking at Metro Car Parks since that date, and has seen growth in utilisation of all car parks as well as increased ticket revenue from the relevant stations.

3.2 The ASLEF, RMT and Unite unions called a day of industrial action on 7<sup>th</sup> June for their DBTW employee members. As a result, DBTW were unable to operate the Metro service on that day. The date also coincided with the Coldplay concert at the Stadium of Light, when an enhanced timetable was scheduled. A bus service for concert goers was provided from central Newcastle to the stadium, and the return service additionally served Heworth. In all, estimated 4000-5000 concert-goers were transported. Season ticket holders were granted a day's extension. Agreement has since been reached between DBTW and the unions, and the threat of further strikes has been lifted.

3.3 Two further concerts were held at the Stadium of Light. Nexus procured additional passenger services from DBTW for the events, including additional customer service staffing and an enhanced Metro timetable. Additional services were also provided for Olympic football matches held at St James' Park, and for the Sunderland Airshow.

3.4 Talks to rebase the contractual agreement on the ¾ Life Refurbishment project have continued and are nearing a conclusion. The agreement will see the project completed to the original timescales and within the capital budget approved by the ITA in January 2012. To the end of Period 6, 8 refurbished Metrocars were running in passenger service.

3.5 Discussions have continued with DBTW with a view to agreeing appropriate staffing numbers and operational hours for the automatic ticket gates. Once agreed, DBTW



REPORT FOR INFORMATION

	<p>will begin the staff recruitment process ahead of the gateline implementation in Spring 2013.</p>
3.6	<p>Heavy rainfall caused flooding events on 28<sup>th</sup> June and 5<sup>th</sup> August which impacted Metro services on subsequent days. On 28<sup>th</sup> June the Metro service was suspended from approximately 1800 onwards as flood waters submerged infrastructure and necessitated station closures. Although the majority of the network was operational for the start of service on 29<sup>th</sup> June, a possession was in effect in the Northumberland Park area as flood waters continued to subside. On 5<sup>th</sup> August, floods necessitated a service withdrawal from certain locations. Three Metrocar units were severely damaged by water during these events, and will not return to service for some time. Fleet availability has reduced as a result.</p>
3.7	<p>Metro punctuality remained around the MAA throughout the two quarters. Flooding incidents and train availability impacted on services, although train door and power faults continued to negatively affect punctuality.</p>
3.8	<p>Station failures under the SQR remained relatively static throughout the two quarters, with the main contributory factors remaining graffiti and light cleaning duties. Train quality failures increased dramatically due to issues with penalty fare signage in the passenger areas, and exterior cleanliness. Nexus have written to DBTW requiring action to be taken over the latter and will monitor the remedial measures put in place.</p>
3.9	<p>RIDDOR-reportable accidents remained around DBTW's target for the majority of Quarter 1, however an increase is seen in Quarter 2 due in part to an increase in people suffering falls on escalators. There have been no RIDDOR major accidents in the year to date so far, whereas there had been six in 2011/12 to the end of Period 6. Other accidents were higher than target for the majority of the two quarters. Escalators continue to be the main source of all accidents, although accidents on trains and stations also rose during Quarter 2. The number of passenger assaults remained below DBTW's target throughout the two quarters.</p>
<b>4</b>	<b>Potential impact on objectives</b>
	N/A

	Benchmark	Period 1	Period 2	Period 3	Period 4	Period 5	Period 6
OPR-(Excess Waiting Time) (see glossary)	12.93 MAA to P6 end	11.12	13.39	10.29	8.47	20.37	15.68
Charter Punctuality (see glossary)	88.61% MAA to P6 end	88.57%	91.41%	88.83%	86.93%	86.30%	88.63%
SQR – Stations (no. of failures)	79 MAA to P6 end	71	69	62	57	71	84
SQR – Trains (no. of failures)	115 MAA to P6 end	154	36	54	20	62	188
Fleet (Ave km per fault)	12,500 DBTW target	11,655	10,920	12,574	11,370	11,288	9,828



Tyne and Wear Integrated Transport Authority  
Metro Sub-Committee

REPORT FOR INFORMATION

	Benchmark	Period 1	Period 2	Period 3	Period 4	Period 5	Period 6
Fraud Rate (% ticketless travel recorded)	4.5 Contractual target	4.44%	4.40%	3.79%	4.76%	4.03%	TBC
Head Count (no. of DBTW staff)	488 DBTW target	478.5	484.8	487.2	484.2	479.2	TBC
Passenger Accidents (RIDBOR)	4.36 DBTW target	5	5	3	4	6	9
Passenger Accidents (Other)	18.76 DBTW target	20	20	10	30	29	27
Passenger Assaults	7.96 DBTW target	6	4	4	3	3	4



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REPORT FOR INFORMATION

**DATE:** 8 November 2012

**SUBJECT:** METRO CUSTOMER SATISFACTION SURVEY RESULTS – MAY 2012

**REPORT OF:** DIRECTOR OF CUSTOMER SERVICES, NEXUS

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Not confidential

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## PURPOSE OF REPORT

To update the members on the latest customer satisfaction surveys for Metro.

## RECOMMENDATIONS

Members are recommended to note the report.

## BACKGROUND DOCUMENTS

None

## CONTACT OFFICERS

*Tobyn Hughes*                      [tobyn.hughes@nexus.org.uk](mailto:tobyn.hughes@nexus.org.uk)                      0191 203 3246

## IMPACT ON OBJECTIVES

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

<b>1</b>	<b>Executive Summary</b>
1.1	The attached appendices illustrate the most recent results of the Customer Satisfaction Surveys (CSS). The surveys are conducted by Nexus Business Intelligence in accordance with a methodology set out in the Concession Agreement.
1.2	A summary of the latest CSS results can be seen in Appendix A. Performance is measured by comparing scores to benchmarks calculated in accordance with the Concession Agreement.
1.3	Increased scores are observed in five out of seven category indicators compared to the November 2011 survey, with the other two categories (Station Equipment and Staff) declining. However, when comparing year-on-year, only three of the seven categories show improvement, with declines in the Station Equipment, Security & Comfort and Staff categories.
1.4	The customer satisfaction scores are not currently achieving the level that is required for DBTW to pass their Committed Obligations, although these do not become applicable until the September 2012 survey.
<b>2</b>	<b>Introduction and Background</b>
2.1	An increase in satisfaction with information is observed in the results illustrated in Appendix A. Satisfaction with announcements and signage has improved, with the only sub-category exhibiting satisfaction decline being information on train departures and arrivals. Overall, the information category is the highest-scoring in terms of satisfaction.
2.2	Staff is the poorest performing category. This continues the trend observed since 2008 (see Appendix B). A year-on-year decline has been observed since the May 2011 survey, although the general trend is one of gradual improvement.
2.3	A year-on-year decrease in satisfaction with station equipment was observed for the first time in recent surveys. Satisfaction with the condition of lifts and escalators contributed to this decline, which reversed the overall increasing trend observed since 2008.
2.4	Also of note was a continuation of the recent increase in satisfaction with ticketing. Figures continued to recover following a large fall in 2009, with satisfaction with the range of tickets available and the facilities for buying tickets improving to the highest levels in recent years.





REPORT FOR INFORMATION

2.5	The terms of the Concession Agreement obliges DBTW to achieve a score of 7.3 for Security and Comfort from the September 2012 survey onwards. The score in the May 2012 survey was 7.26, slightly below DBTW's target. A year-on-year decline with satisfaction with personal security contributed to the overall reduction.
2.6	The Overall Category Indicator gives passengers the opportunity to give Metro an overall score out of 10 and is conducted as part of the Customer Satisfaction Survey. The results of the May survey are displayed in Appendix A.
2.7	The overall average score of 8.02 is a slight decrease on the previous score of 8.04. When the scores are analysed by route section (see Appendix C), the lowest average satisfaction is observed between Pelaw and South Shields (7.6), replacing the previous worst performing line section, North Shields to St James (7.7). The highest average satisfaction was recorded on the route section from Gateshead to Heworth (8.4), and satisfaction between Park Lane and South Hylton (8.3), and Central Station to Haymarket (8.2) also remains high.
2.8	Under the terms of the Concession Agreement, DBTW are obliged to achieve an overall CSS score (overall category indicator) of 8.3 in the September 2012 survey and maintain or improve upon this score in every survey until the Concession End Date.
2.9	Should the aforementioned contractual obligations fail to be met; appropriate financial adjustments will be made to the Concession Payment.
<b>3</b>	<b>Next Steps</b>
3.1	Nexus addressed the results of the May 2012 CSS survey with DBTW at the appropriate Concession Meeting. The Operator was reminded of its obligations under the Concession Agreement.
3.2	Nexus will monitor the results of the next CSS survey, and make the appropriate financial adjustments to the Concession Payment in the event of a failure by DBTW to comply with the obligations.
<b>4</b>	<b>Potential impact on objectives</b>
	N/A

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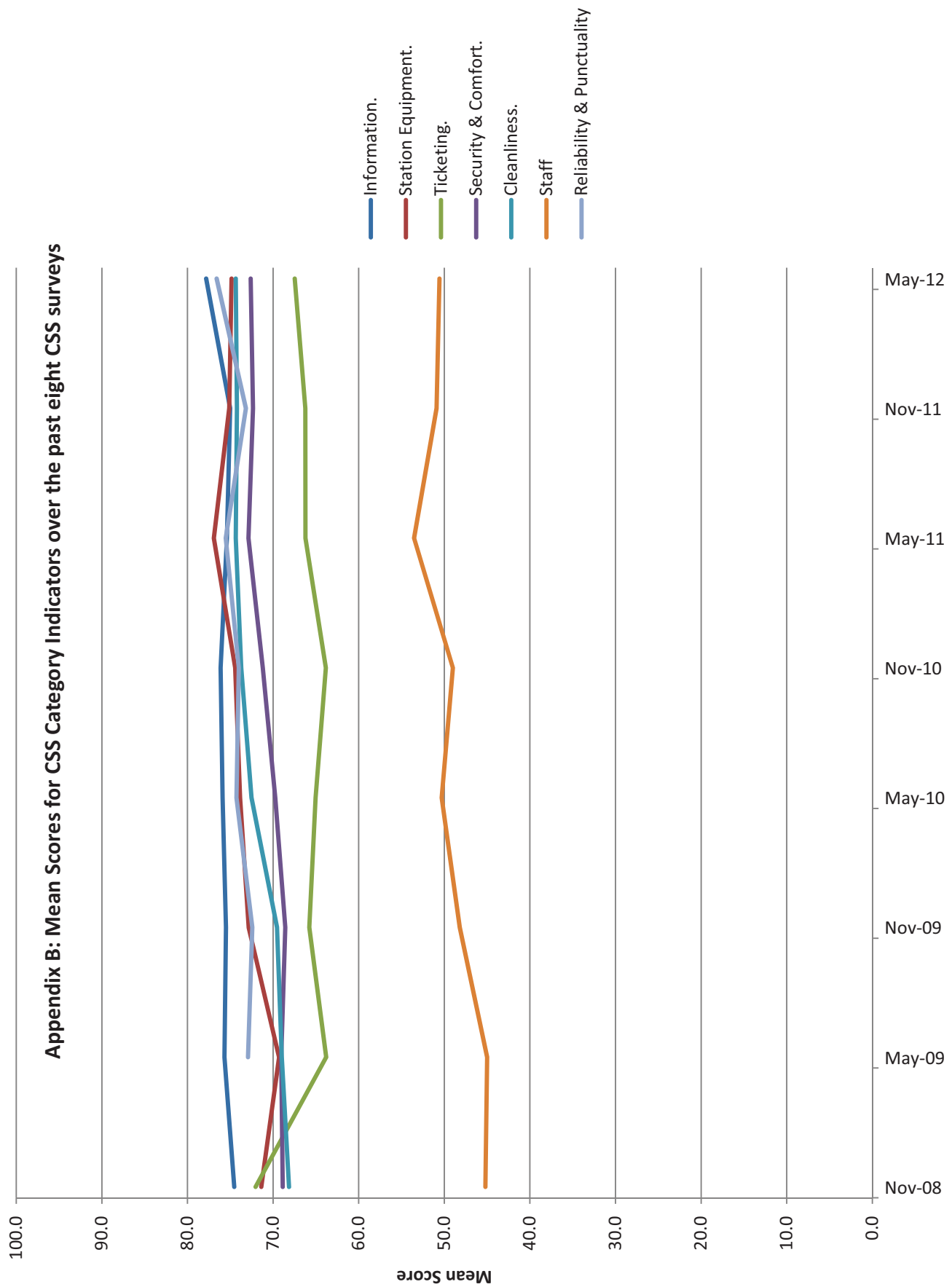
Appendix A: Results of the May 2012 Customer Satisfaction Survey

Category/Sub-Category Indicator	May-08	Nov-08	May-09	Nov-09	May-10	Nov-10	May-11	Nov-11	May-12	Trend from Nov	Trend Year on Year	CSS Benchmark	Performance P
	Mean Score	Mean Score	Mean Score	Mean Score	Mean Score	Mean Score	Mean Score	Mean Score	Mean Score				
Information on Trains arrival /departures	76.1	76.0	76.9	76.9	77.7	77.2	77.2	76.8	76.7	↓	↓	77.2	-0.50
Ease of understanding signage at Stations	77.2	78.8	79.3	78.4	79.5	81.0	79.6	78.6	83.6	↑	↑	80.2	3.44
Helpfulness of signage at the station	76.5	78.0	78.5	77.6	79.3	80.1	79.5	78.5	83.2	↑	↑	79.7	3.50
Clarity of announcements at the station	72.0	70.8	73.0	74.0	74.7	73.9	70.6	70.4	70.8	↑	↑	71.9	-1.10
Clarity of other announcements on Trains	72.7	71.7	72.4	73.3	71.3	73.5	72.3	74.6	78.3	↑	↑	73.7	4.60
The information on TIM machines (TIM users only)	69.3	71.9	74.0	72.8	72.9	71.1	70.6	71.1	74.2	↑	↑	70.9	3.36
<b>Information.</b>	<b>74.0</b>	<b>74.5</b>	<b>75.7</b>	<b>75.5</b>	<b>75.9</b>	<b>76.1</b>	<b>75.4</b>	<b>75.0</b>	<b>77.8</b>	↑	↑	<b>75.7</b>	<b>2.12</b>
Condition of the Station	66.4	69.5	69.4	69.9	74.1	73.6	74.5	73.7	73.9	↑	↓	74.2	-0.25
Lighting at the Station	74.6	76.4	76.2	75.0	77.5	79.3	78.5	77.2	78.5	↑	↔	78.8	-0.33
Condition of the Lifts	62.1	64.5	57.4	70.0	67.4	67.4	75.5	73.6	71.9	↓	↓	74.3	-2.42
Condition of the escalators	72.9	75.1	74.2	76.5	76.4	77.4	79.6	76.0	75.1	↓	↓	78.7	-3.68
<b>Station Equipment.</b>	<b>69.0</b>	<b>71.4</b>	<b>69.3</b>	<b>72.9</b>	<b>73.9</b>	<b>74.4</b>	<b>76.9</b>	<b>75.1</b>	<b>74.9</b>	↓	↓	<b>75.9</b>	<b>-1.07</b>
The range of tickets available	71.1	71.2	75.1	73.9	72.2	70.6	69.2	71.9	74.0	↑	↑	70.8	3.14
Facilities for buying tickets	69.8	72.9	70.1	70.8	70.8	70.0	72.5	70.0	72.6	↑	↑	71.5	1.11
Ticket cost Value for money			46.2	52.6	52.1	50.9	51.9	56.8	55.8	↓	↑	54.9	0.97
<b>Ticketing.</b>	<b>70.5</b>	<b>72.1</b>	<b>63.8</b>	<b>65.8</b>	<b>65.0</b>	<b>63.8</b>	<b>66.2</b>	<b>66.2</b>	<b>67.5</b>	↑	↑	<b>66.2</b>	<b>1.25</b>
Your personal security approaching the station	69.1	72.5	72.9	71.0	73.1	74.5	77.8	75.6	76.8	↑	↓	76.5	0.31
Your personal security at the station	67.7	71.4	72.5	70.4	73.3	73.5	76.6	74.1	76.1	↑	↓	75.4	0.75
Behaviour of other passengers	58.7	60.8	60.4	62.8	62.6	64.5	63.4	66.1	65.8	↓	↑	65.0	0.86
Your personal security on the Train	66.0	70.8	70.4	70.1	70.0	72.3	73.7	73.6	71.7	↓	↓	73.6	-1.90
<b>Security &amp; Comfort.</b>	<b>65.4</b>	<b>68.9</b>	<b>69.1</b>	<b>68.6</b>	<b>69.8</b>	<b>71.2</b>	<b>72.9</b>	<b>72.3</b>	<b>72.6</b>	↑	↓	<b>72.6</b>	<b>0.07</b>
General cleanliness of the Station	63.7	66.8	67.6	69.6	72.2	71.6	74.0	71.0	73.2	↑	↓	73.0	0.19
Levels of graffiti	68.4	73.3	76.8	76.8	79.2	81.6	79.4	83.2	84.7	↑	↑	81.7	3.01
Levels of graffiti and damage to the Train	67.8	68.1	69.5	69.6	72.5	75.2	75.2	78.6	79.2	↑	↑	77.2	1.99
Cleanliness of inside of Trains	63.1	64.2	63.9	64.7	69.0	69.4	71.4	68.3	68.0	↓	↓	70.6	-2.64
Cleanliness of outside of Trains	65.5	68.3	67.1	67.0	69.7	70.8	71.8	70.1	66.7	↓	↓	71.4	-4.67
<b>Cleanliness.</b>	<b>65.7</b>	<b>68.1</b>	<b>69.0</b>	<b>69.5</b>	<b>72.5</b>	<b>73.7</b>	<b>74.4</b>	<b>74.2</b>	<b>74.4</b>	↑	↔	<b>74.3</b>	<b>0.09</b>
Availability of staff	36.9	45.2	45.0	48.2	50.3	49.0	53.5	50.9	50.6	↓	↓	52.0	-1.40
<b>Staff</b>	<b>36.9</b>	<b>45.2</b>	<b>45.0</b>	<b>48.2</b>	<b>50.3</b>	<b>49.0</b>	<b>53.5</b>	<b>50.9</b>	<b>50.6</b>	↓	↓	<b>52.0</b>	<b>-1.40</b>
Train Reliability			76.7	76.0	77.3	77.7	78.0	75.9	79.2	↑	↑	77.9	1.40
Train Punctuality			77.8	76.7	78.8	79.1	78.8	76.7	80.0	↑	↑	78.9	1.00
Availability of seats			67.2	67.1	69.6	68.3	71.8	68.9	72.7	↑	↑	70.4	2.30
Availability of standing			70.0	69.9	71.4	70.9	73.6	71.3	74.4	↑	↑	72.5	1.90
<b>Reliability &amp; Punctuality</b>			<b>72.9</b>	<b>72.4</b>	<b>74.3</b>	<b>74.0</b>	<b>75.5</b>	<b>73.2</b>	<b>76.6</b>	↑	↑	<b>74.9</b>	<b>1.68</b>

Overall Category Indicator	
Overall score out of 10	8.02
1	0
2	1
3	2
4	2
5	13
6	48
7	207
8	419
9	210
10	87

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Appendix B: Mean Scores for CSS Category Indicators over the past eight CSS surveys



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Appendix C - Overall Metro Satisfaction by Route Section

Route Section	Avg Score		Avg Score		Avg Score	
	May-11	Nov-11	Nov-11	May-12	May-12	May-12
Regent Centre - Airport	8.1	8.2	8.2	8.1	8.1	8.1
South Shields - Pelaw	7.8	8.0	8.0	7.6	7.6	8.0
Longbenton - Tynemouth	7.8	7.9	7.9	8.0	8.0	8.0
Fellgate - Sunderland	8.2	7.8	7.8	7.9	7.9	7.9
North Shields - St James	7.6	7.7	7.7	7.7	7.7	7.7
Central - Haymarket	8.0	8.1	8.1	8.2	8.2	8.2
Heworth - Gateshead	8.1	8.2	8.2	8.4	8.4	8.4
Jesmond - South Gosforth	7.9	8.0	8.0	7.8	7.8	7.8
Park Lane - South Hylton	8.3	8.5	8.5	8.3	8.3	8.3

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REPORT FOR INFORMATION

**DATE:** 8 November 2012  
**SUBJECT:** HIGH VOLTAGE ELECTRICITY CONSUMPTION ON METRO  
**REPORT OF:** DIRECTOR OF CUSTOMER SERVICES, NEXUS

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Not confidential

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## PURPOSE OF REPORT

To update the members on measures taken to reduce high voltage electricity consumption on Metro.

## RECOMMENDATIONS

Members are recommended to note the contents of this report and accompanying presentation.

## BACKGROUND DOCUMENTS

Presentation on DBTW's use of 'FASSI' technology

## CONTACT OFFICERS

*Tobyn Hughes*

*tobyn.hughes@nexus.org.uk*

*0191 203 3246*

## IMPACT ON OBJECTIVES

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

<b>1</b>	<b>Executive Summary</b>
1.1	Under the terms of the Concession Agreement, DB Regio Tyne & Wear (DBTW), as Metro Operator, are incentivised to reduce the amount of high voltage electricity (HVEC) consumed annually by Metro.
1.2	DBTW have introduced measures intended to reduce consumption, and have seen success in certain areas.
1.3	Projections for the financial year ending 31 <sup>st</sup> March 2013 suggest that despite these measures DBTW may fail to achieve their reduction target. Further exploration of contributory factors will be undertaken in a further effort to improve performance in this area.
1.4	DBTW will provide a presentation at the Metro Sub-Committee meeting, detailing their work to date and setting out the causal factors.
<b>2</b>	<b>Introduction and Background</b>
2.1	The Concession Agreement incentivises DBTW to reduce the amount of HVEC electricity consumed by Metro in the first three years of the Operating Concession, and maintain the target level thereafter.
2.2	Consumption targets (in kWh) are written into the terms of the contract. If DBTW achieve these targets, they are rewarded with a bonus that reflects the saving made by Nexus as bill payer. If DBTW fail to achieve the targets, they are financially penalised.
2.3	Cumulative HVEC consumption to the end of Period 6 was greater than the same period last year, and is projected to be remain greater by the end of the financial year. To achieve the target, DBTW would need to achieve a consumption reduction of 1.97% over the 2011-12 levels.
2.4	In compliance with their contractual obligation, DBTW have invested over 1.5m Euros in installing the Fahrplan Assistenz System (FASSI) to the entire Metrocar fleet. One of the benefits of this system was that it would contribute towards reducing HVEC consumption by supplying real-time information on route timings and advising drivers of their optimum speed in terms of energy use. This system went live on 15 <sup>th</sup> June 2011.
2.5	The impact of the FASSI system is detailed in a presentation which will be given to



REPORT FOR INFORMATION

	members at the meeting, which also outlines DBTW's proposed next steps for reducing HVEC consumption.
2.6	It should be noted that while Line Closures and Possessions contribute towards reducing HVEC consumption by isolating the overhead lines for extended periods of time, the temporary Metro timetable may in fact generate additional mileage which may offset some of the consumption savings.
<b>3</b>	<b>Next Steps</b>
3.1	DBTW will continue to explore the contributory factors towards HVEC consumption on Metro and introduce strategies to reduce consumption where practicable.
3.2	DBTW will continue to work with drivers, controllers and timetable planners to optimise the benefits of the FASSI system.
3.3	External factors such as Possessions will continue to contribute towards HVEC consumption reduction.
3.4	Actual HVEC consumption figures will continue to be monitored by Nexus on a periodic basis, with an appropriate financial adjustment made to Concession Payment in Period 3 of the next financial year to reflect DBTW's performance against target.
<b>5</b>	<b>Potential impact on objectives</b>
5.1	Should HVEC consumption reduction be achieved, it will contribute positively towards the objective to address climate change.

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# DBTW use of FASSI *Update: Oct 2012*

Oliver Bratton  
Operations Director



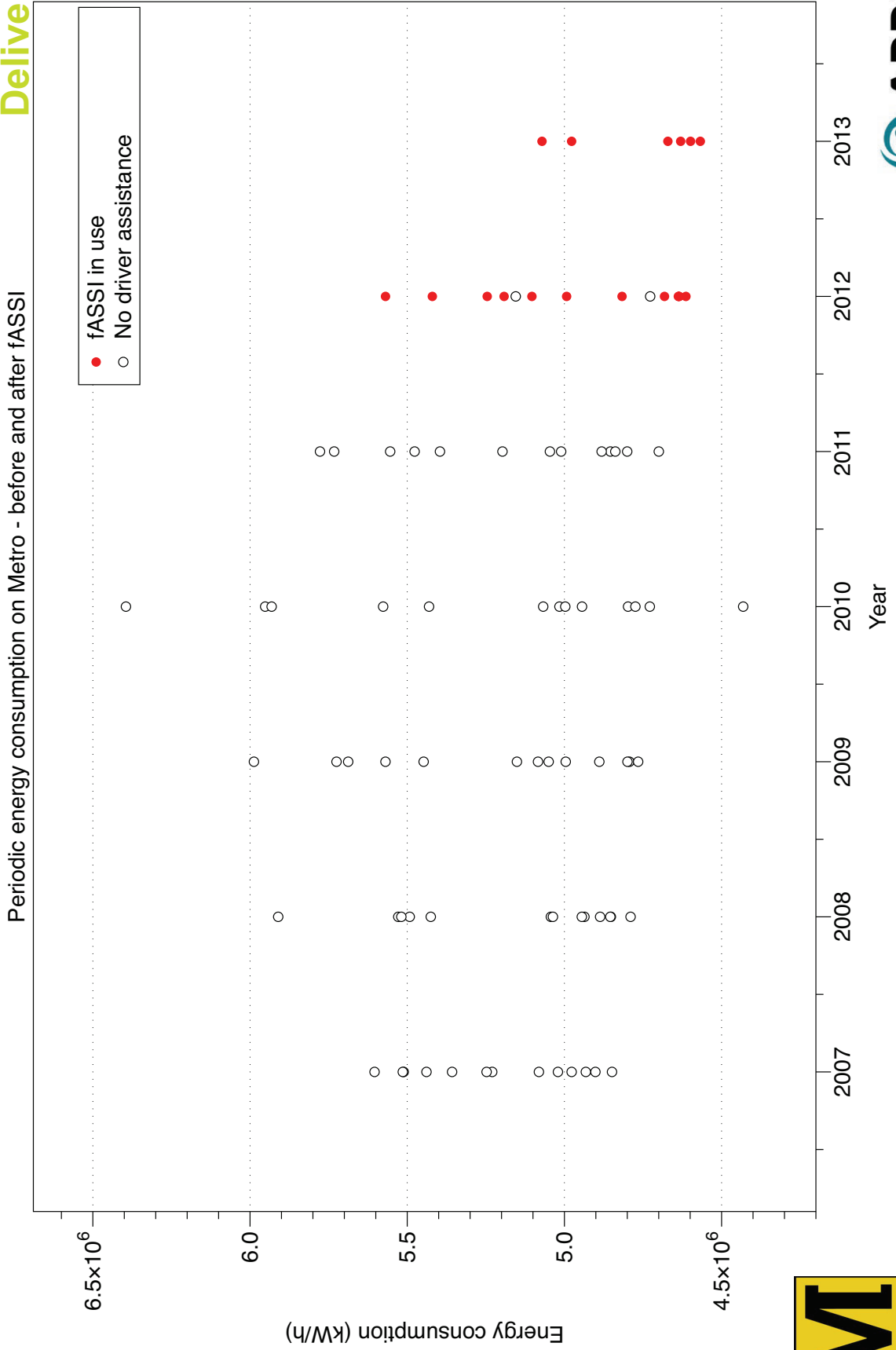
# Objectives of the presentation

Strategic  
Customer focused  
Innovative  
Inspiring  
Trusting  
Delivering

- One year of operation
  - What has it delivered?
  - What have we learned?
  - What further needs to be done?
  - Where else help is needed

# Energy consumption

Strategic  
Customer focused  
Innovative  
Inspiring  
Trusting  
Delivering



# fASSI in practice

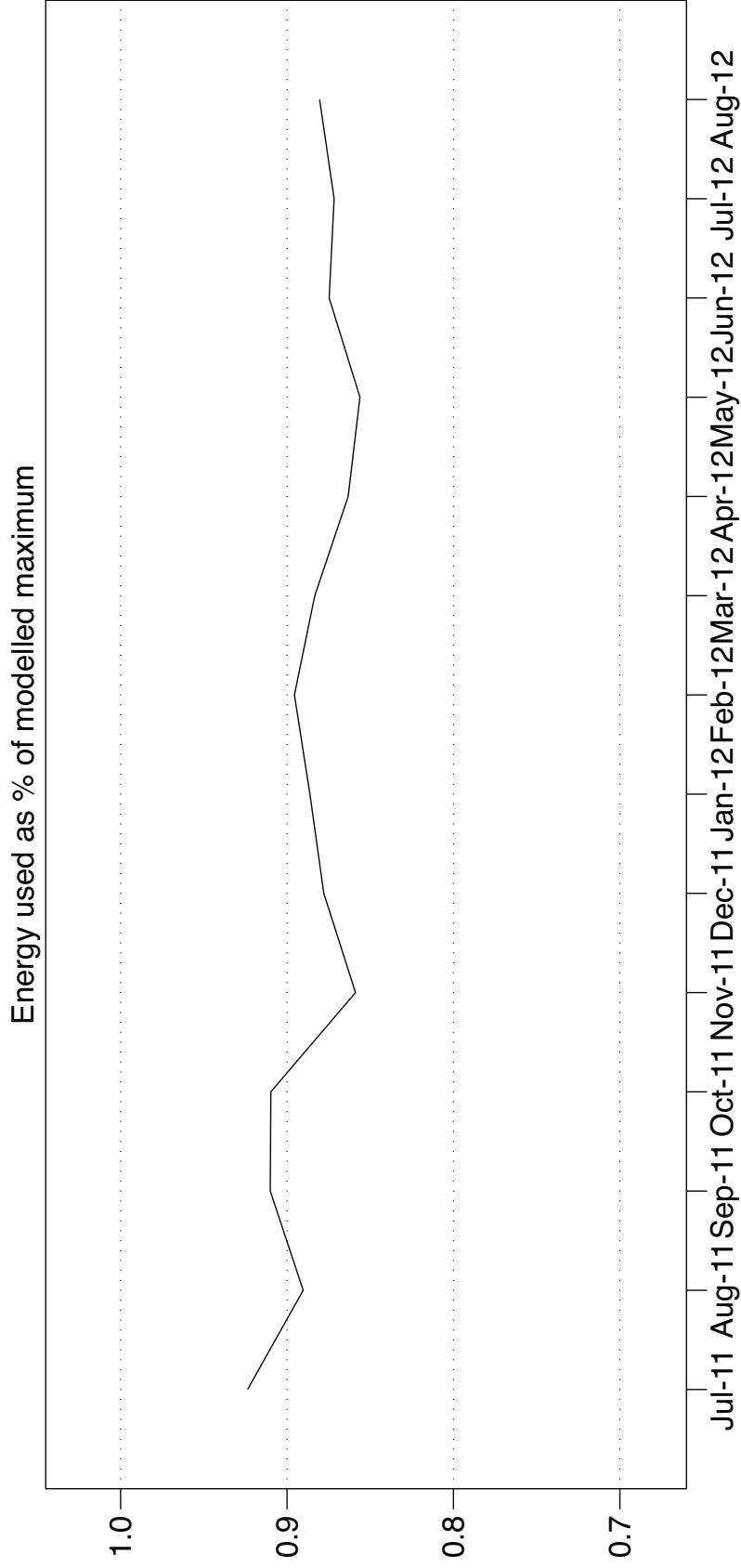
Strategic  
Customer focused  
Innovative  
Inspiring  
Trusting  
Delivering

- Drivers can only save energy:
  - when not late
  - relative to timetable



# Relative energy consumption

Strategic  
Customer focused  
Innovative  
Inspiring  
Trusting  
Delivering



# Energy saving

Strategic  
Customer focused  
Innovative  
Inspiring  
Trusting  
Delivering

- Approximately 6% improvement by drivers
- Some is offset by:
  - Increased KM in timetables
  - Changes to timetable
- Actual savings currently 4.5%



# Changing driver behaviour?

Strategic  
Customer focused  
Innovative  
Inspiring  
Trusting  
Delivering

- 14% reduction in early running since March
- 16% improvement in right time running (+/- 10 secs)
  - Despite overall punctuality declining from 87% to 83% in same time period



# What has been learned?

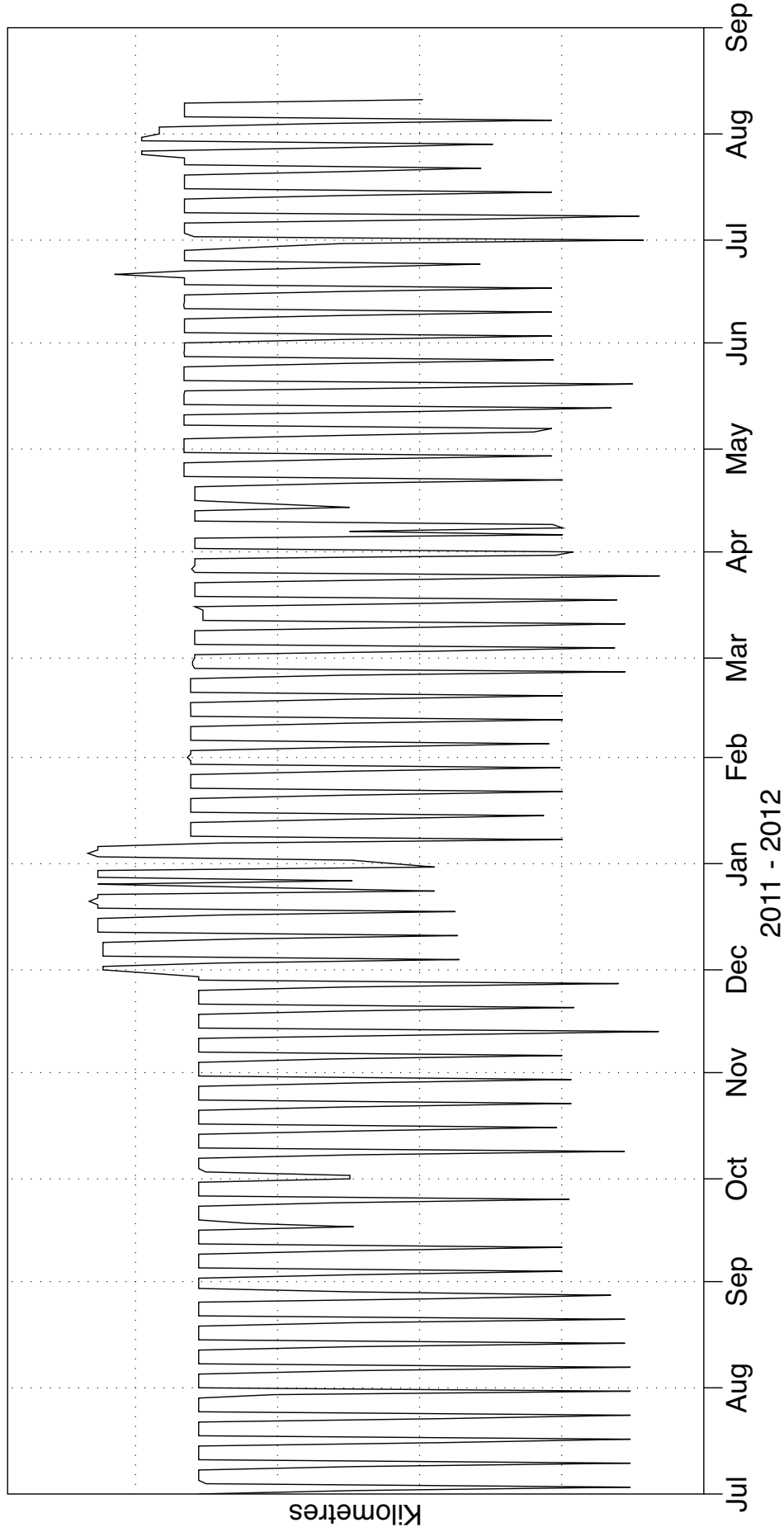
**Strategic**  
**Customer focused**  
**Innovative**  
**Inspiring**  
**Trusting**  
**Delivering**

- Timetables keep changing
  - Carriage wash
- Drivers take time to adapt
  - First three days of new timetable 4% worse
- Timings (especially Sundays)

# Timetable changes

Strategic  
Customer focused  
Innovative  
Inspiring  
Trusting  
Delivering

Effects of TT on HVEC



## Next steps

Strategic  
Customer focused  
Innovative  
Inspiring  
Trusting  
Delivering

- Still 20% of stops are more than 10 seconds early
- Only 70% of HVEC is movement of trains
  - Heating
  - Stations
  - Depot
  - Driver improvements only 2/3rds effective
- Need to understand relationship with performance

# Timetable

Strategic  
Customer focused  
Innovative  
Inspiring  
Trusting  
Delivering

- Still aim of DBTW to make timetable more efficient
- Ensuring that 'extra' moves are better managed

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