



North East Joint Transport Committee

Tuesday, 15th June, 2021 at 2.30 pm

Meeting to be held in the Council Chamber - Gateshead Civic Centre

AGENDA

| | Page No |
|--|---------|
| 1. Appointment of the Chair and Vice Chair for the Municipal Year 2021/22 | |
| 2. Apologies for Absence | |
| 3. Declarations of Interest | |
| Please remember to declare any personal interest where appropriate both verbally and by recording it on the relevant form (to be given to the Democratic Services Officer). Please also remember to leave the meeting where any personal interest requires this. | |
| 4. Minutes of the previous meeting held on 16 March 2021 | 3 - 9 |
| 5. Appointment of JTC Committees | 11 - 18 |
| 6. Programme of Committee Meetings for the 2021/22 Municipal Year | 19 - 23 |
| 7. Transport North East - Transport Plan Progress Report | 25 - 39 |
| 8. Active Travel Fund Update | 41 - 47 |
| 9. Bus Partnerships | 49 - 69 |
| 10. Bus Partnerships Project Resources | 71 - 76 |
| 11. Exclusion of the Press and Public | |

The Joint Transport Committee may wish to exclude the Press and Public during consideration of the next item by virtue of paragraph 3 of Schedule 12A of the Local Government Act 1972

12. **Enhanced Bus Partnerships Project Budget**

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NORTH EAST JOINT TRANSPORT COMMITTEE

DRAFT MINUTES FOR APPROVAL

DATE: 16 March 2021

Meeting held: Virtually using Microsoft Teams and streamed live on YouTube

Committee Members Present:

Councillor: M Gannon (Chair)

Councillors: C Johnson, C Marshall, G Miller, G Sanderson, M Walsh and Mayor J Driscoll

In attendance:

Councillor: J McCarty

Statutory Officers: M Barker (Monitoring Officer - Transport)
P Darby (Chief Finance Officer)
T Hughes (Managing Director, Transport North East)
S Ramsey (Lead Chief Executive for Transport)

Officers: G Armstrong, R Broadbent, P Fleming, R Forsyth-Ward,
E Goodman, A Graham, G Grant, A Harhoff, M Kearney,
P Meikle, P Melia, R O'Farrell, J Sparks, E Reynard, D Wafer,
A White and M Wilson.

1. APOLOGIES FOR ABSENCE

Apologies were received from Councillor T Dixon and Mayor N Redfearn.

2. DECLARATIONS OF INTEREST

There were no declarations of interest.

3. MINUTES OF THE PREVIOUS MEETING HELD ON 19 JANUARY 2021

The minutes of the previous meeting were agreed as a correct record.

4. THE NORTH EAST TRANSPORT PLAN

The Committee considered a report which outlined the responses to the consultation on the Transport Plan which ended on 14 January.

The responses and insights arising from the consultation have been considered and amendments made to the draft Plan. In addition, a 'Your consultation feedback, our response' document has been produced summarising the feedback and setting out the proposed actions. The Integrated Sustainability Appraisal has also been updated.

The Committee were also asked to consider a letter from the Joint Transport Committee Overview and Scrutiny Committee outlining its response to the consultation.

Mayor Driscoll thanked the Transport North East team for their work on developing the Plan. He was impressed by the depth and engagement that the team had undertaken as part of the consultation and the changes made as a result. He noted that 68% of households in the North East own a car which highlights how reliant the region is on public transport. He added that the Government need to stick to their promise of levelling up the region and providing funding so that the Plan can be delivered.

Councillor Gannon commented that the Plan is a unique example of seven local authorities working together for the benefit of the whole region. He noted that the London receives seven times more Government funding per head of the population that the North East and added that although he accepts that there is a bigger population in London, the North East should receive its fair share.

Councillor McCarty agreed with the comments made so far and added her thanks to the Transport North East team for their hard work. She suggested that in future consultation exercises, more effort is made to engage more widely with different areas of the population. She felt that although there had been a very good response this time, some groups could have been better represented.

RESOLVED: The North East Joint Transport Committee unanimously:

- (i) Approved the North East Transport Plan
- (ii) Approved the 'Your Consultation, Our Response' document;
- (iii) Approved the Integrated Sustainability Appraisal; and
- (iv) Agreed that these documents be published.

5. TRANSPORT REVENUE BUDGET MONITORING REPORT

The Committee received a report which provided an update on the forecast outturn position in relation to the 2020/21 Transport Revenue Budget. The report covers all areas of the revenue budget including the transport levies and grants to Durham, Northumberland and Nexus, Transport Strategy Unit and the Tyne Tunnels revenue account.

The forecast outturn position for the year shows that expenditure is expected to be within the revised budget against all budget headings.

RESOLVED: The North East Joint Transport Committee noted the report.

6. TRANSPORT CAPITAL PROGRAMME MONITORING REPORT 2020/21

The Committee received a report which detailed the 2020/21 capital programme plans, together with details of expenditure to date and updated on the forecasts of the outturn position based on the position at the end of January 2021.

The report identified that total capital expenditure on Transport schemes of £89.850m is forecast against the revised programme budget of £91.802m, a forecast under-spend of £1.952m against the revised programme.

The Transport capital programme encompasses a wide range of capital schemes, mainly delivered by constituent local authorities and Nexus, but also investment in the Combined Authorities' own assets, including the Tyne Tunnels.

The report summarised the progress of various projects including Tranches 1 and 2 of the Transforming Cities Fund, the Go Ultra Low project, the Metro Asset Renewal Plan programme and the Metro Fleet Replacement project. Work is still outstanding to complete the inclined lifts at the Tyne Pedestrian and Cycling Tunnels. Expenditure on the Nexus elements (£2.640m) is included in the sections on the Nexus capital programme.

Most of the capital works during the year will be funded through government grants awarded (£75.116m in 2020/21) with elements of the Nexus capital programme and the Tyne Pedestrian and Cyclist Tunnels works funded by reserves (£14.734m in 2020/21) held specifically for this purpose. A proposal for a funding swap has been put forward by the North East LEP. If required, this would involve temporary grant funding being provided to fund Tyne Tunnel capital works in 2020/21, to enable the LEP to maximise usage of their Local Growth Fund grant in year. Payment would then be made to the LEP of the equivalent amount from the Tyne Tunnels reserves, which they could apply to fund their LGF programme in future years.

RESOLVED: The North East Joint Transport Committee:

- (i) Noted the report;
- (ii) Approved the refocusing of TCF Tranche 1 funding for two Newcastle schemes as described in paragraph 2.6 of the report;
- (iii) Authorised the Chief Finance Officer to agree any required funding swaps as described in paragraph 2.33 of the report;
- (iv) Authorised the Managing Director, Transport North East, following consultation with the Chief Finance Officer and Monitoring Officer, to agree with TCF Tranche 2 scheme promoters the reprofiling of the approved grant funding to support detailed scheme design and development, subject to continuing compliance with the Joint Transport Committee's Scheme

- Assurance Framework in all other respects and the DfT grant conditions;
and
- (v) Agreed the allocation of LTP Integrated Transport Block grant for 2021/22 as set out in table 2.36 of the report.

7. TRANSPORT NORTH EAST – REGIONAL TRANSPORT UPDATE

The Committee received a report which provided an update on regional transport issues.

The Government announced on 23 January 2021, that it had awarded Northumberland County Council £34m to progress the re-opening of the Northumberland Line rail route. The funding is for preparatory work, including land acquisition, detailed design work and early site works. The re-opening of the Northumberland Line is a hugely important scheme to improve regional connectivity and is part of the Transport Plan.

An officer Programme Board has been established to bring together key partners and stakeholders involved in reopening the Leamside Line, another key priority in the Transport Plan and another major opportunity to improve regional connectivity. The Programme Board will work to produce an ‘Umbrella’ Strategic Outline Business Case bringing together all of the costs and benefits of reopening the line.

Six bids have been submitted by the region to round 3 of the Restoring Your Railways Fund ‘Ideas Fund’. If successful, the bids will provide funding for feasibility studies for the reopening of stations and local passenger rail services in the region.

The Committee were advised that it is expected that the Government will publish its Integrated Rail Plan (IRP) for the North and Midlands later this year. The region’s Transport for the North Board representatives have reiterated that the full reopening of the Leamside Line should be part of the preferred Northern Powerhouse Rail network which will be further developed once the IRP has been published.

Councillor Marshall who represents NECA on the TfN Board, advised the Committee that although it was disappointing that there had been a delay on TfN being able to submit its proposals for the Northern Powerhouse Rail network, lobbying will continue across the region and it is hoped that the Government will fully support the ambitions of the region.

Councillor Sanderson commented that there had been lots of good joint working from the region to support the progression of the Northumberland Line and he was grateful to the Government for providing funding for the first stage. He added that he felt there were lots of other positive things in the pipeline and it was important to continue to work together.

Councillor Gannon agreed and reiterated that it was important to continue to work together for the benefit of the region.

Mayor Driscoll agreed and added that there was lots of good news for the region, however it was important that the Government provided support for the reopening of the Leamside Line.

RESOLVED: The North East Joint Transport Committee noted the report.

8. ACTIVE TRAVEL FUND PROPOSAL

The Committee received a report which proposed using £319,500 of the region's remaining Active Travel Fund Tranche 2 allocation to promote regional tourism this summer.

The package will include:

- A call-to-action marketing campaign to use our cycling and walking infrastructure to explore our region, improving health and boosting the local economy; and
- Enhancements to the current programme of schemes funded by the Active Travel Fund Tranche 2 allocation.

The plans align with Active Travel Fund criteria and aims to encourage walking and cycling across the region and maximise the environmental, economic and health benefits.

Councillor McCarty was very supportive of this proposal but suggested that there needed to be a legacy from this investment which could be used for years to come.

RESOLVED: The North East Joint Transport Committee approved the use of £319,500 of the unallocated sum from the Active Travel Fund to fund a campaign to promote internal tourism using active travel in the region this summer to maximise the environmental, economic and health benefits of our active travel infrastructure.

9. NORTH EAST ELECTRIC VEHICLE INFRASTRUCTURE – AGREEMENT OF LOCAL GROWTH FUND PROJECT

The Committee considered a report which outlined proposals for the installation of electric vehicle charging infrastructure at seven sites across the region which will be funded by the Local Growth Fund.

If agreed a procurement exercise will take place to source a supplier to install, operate and maintain the EV charging assets.

Councillor McCarty commented that although she was supportive of the project, the timescales for completion appeared to be very tight. Officers advised that everything possible would be done to ensure that the project was completed on time.

Councillor Miller was also supportive of the proposals but felt that affordability of electric vehicles was the biggest barrier to many people. He felt that a regional approach was required to lobby Government to make the vehicles more affordable.

RESOLVED: The North East Joint Transport Committee:

- (i) Agreed to the sites listed in paragraph 1.3 of the report for the installation of EV charging assets using the available grant funding; and
- (ii) Delegated authority to the Managing Director, Transport North East to:
 - (a) negotiate and agree the detailed locations of the EV assets and acquisition of the land required for their installation, operation and future maintenance; and
 - (b) procure and appoint a supplier (or suppliers) of the EV charging equipment and appropriate future maintenance arrangements following consultation with the Chief Finance Officer and Monitoring Officer.

10. BUS PARTNERSHIP

The Committee considered a report proposing the commencement of a project to consider the feasibility and possible delivery of a bus partnership between JTC and NEbus (the umbrella network which represents all of the region's bus operators).

The region's bus network is a vital part of the regional public transport system which is hugely important to the economy and society. The region has relatively low car ownership, with around 75% of journeys taking place on public transport.

The Joint Transport Committee has previously made it clear it wishes to work closely with the bus operators to improve outcomes for passengers and to ensure the sustainability of the bus network during and beyond the pandemic.

The Government has indicated that recovery funding is likely to be made available where local authorities and bus companies work together in a formal partnership.

Initial informal discussions have taken place between the JTC and NEbus at which all parties have expressed a desire to work together in partnership. In addition, at its last meeting, the Joint Transport committee agreed funding to be released to take this work forward.

Councillor Gannon commented that this work was essential for the many households that rely on public transport and it was vital that the JTC played its part in the partnership arrangements.

RESOLVED: The North East Joint Transport Committee:

- (i) Agreed to the commencement of a project which will consider how a Bus Partnership can be progressed, building on the shared objectives and principles of the North East Joint Transport Committee and the North East Bus Operators (NEBus); and
- (ii) Noted the appointment of a temporary, part-time Project Manager to take this work forward.

11. EXCLUSION OF THE PRESS AND PUBLIC

RESOLVED: The North East Joint Transport Committee agreed to exclude the press and public during consideration of item 11 by virtue of paragraphs 1,2,3 and 4 of Part 1 of Schedule 12A of the Local Government Act 1972.

Following agreement of this resolution, the live stream of the meeting on YouTube was suspended.

12. CONFIDENTIAL MINUTES OF THE MEETING HELD ON 19 JANUARY 2021

The minutes were agreed as a correct record.

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North East Joint Transport Committee

Date: 15 June 2021

Subject: Appointment of Chairs and Vice Chairs to JTC Committees

Report of: Monitoring Officer - Transport

Executive Summary

This report seeks approval of the membership of the JTC Committees for 2021/22.

The report also seeks approval for reappointment of the Independent Chairs and Vice Chairs for the JTC Audit Committee and the JTC Overview and Scrutiny Committee and the appointment of the Chair and Vice Chair for the JTC Tyne and Wear Sub-Committee.

Recommendations

It is recommended that the Joint Transport Committee:

- (i) Agree the appointment committee members and sub-committee members for the municipal year 2021/2022 as set out in Appendix A.
- (ii) Agree the reappointment of the Chair and Vice-Chair for the JTC Audit Committee for one year;
- (iii) Agree the reappointment of the Chair and Vice-Chair for the JTC Overview and Scrutiny Committee for one year;
- (iv) Agree the appointment of the Chair and Vice Chair for the JTC Tyne and Wear Sub-Committee for the municipal year 2021/22;

1. Background Information

- 1.1 In accordance with the Newcastle Upon Tyne, North Tyneside and Northumberland Combined Authority (Establishment and Functions) Order 2018 (the **Order**), the North East Combined Authority (**NECA**) and the Newcastle Upon Tyne, North Tyneside and Northumberland Combined Authority (**NTCA**) have appointed the Joint Transport Committee (JTC) to exercise functions as specified in the Order.
- 1.2 In accordance with the Order, the Joint Transport Committee must appoint an independent person to be Chair of its Audit Committee and Overview and Scrutiny Committee. There is no provision in the Order for a Vice Chair, however it was considered prudent when the Committees were established to plan for occasions when the Chair was unavailable.
- 1.3 The Joint Transport Committee agreed the appointments of the Chair and Vice Chairs for both Committees for a term of two years in 2019. The appointments were made with the option for them to be extended for a further term of two years.
- 1.4 The Joint Transport Committee must also appoint a Chair and Vice Chair for the Tyne and Wear Sub-Committee at its annual meeting. The Chair and Vice Chair must be members of the Tyne and Wear Sub-Committee.

Joint Transport Committees and Sub-Committees - Municipal Year 2021/22

- 2.1 Listed below are the JTC Committees for the municipal year 2021/22:
 - JTC Tyne and Wear Sub-Committee: focuses on the Tyne and Wear area;
 - JTC Audit Committee: this Committee is a key component of the corporate governance arrangements and is an important source of assurance about the Joint Transport Committees arrangements for managing risk, maintaining an effective control environment; and reporting on financial and other performance; and
 - JTC Overview and Scrutiny Committee: providing effective scrutiny arrangements, ensuring accountability and transparency of decision making for the Joint Transport Committee.
- 2.2 Relevant terms of reference of the above committees and sub-committee are set out in the Joint Transport Committee's Standing Orders.
- 2.3 The nominations for the membership of the committees outlined in this report for the municipal year 2021/22, including substitute members where appropriate, are set out as Appendix A.

3. Proposal – Chairs and Vice Chairs

- 2.1 To ensure consistency in the roles it is considered appropriate to reappoint Mark Scrimshaw and Stuart Green as Chair and Vice-Chair of the JTC Audit and David Taylor-Gooby and Andrew Clark as Chair and Vice Chair of the JTC Overview and Scrutiny Committee for one year. Following this, the roles will be reviewed.
- 2.2 The Joint Transport is also invited to appoint the Chair and Vice Chair of the Tyne and Wear Sub Committee from the committee membership.

3. Reasons for the Proposals

- 3.1 The proposals will enable the Joint Transport Committee to operate effectively and in accordance with the Order and the Standing Orders.

4. Alternative Options Available

- 4.1 The proposals are set out in the recommendations of this report. The alternative would be that alternative members are nominated.

5. Next Steps and Timetable for Implementation

- 5.1 The committee structure will be published on NECA's website, the Joint Transport Committee page and all stakeholders informed, as soon as practicably possible.

6. Potential Impact on Objectives

- 6.1 The appointments will enable the Joint Transport Committee and its committees and subcommittee to properly discharge its functions, thereby assisting in the delivery on its objectives.

7. Financial and Other Resources Implications

- 7.1 The provision of the support arrangements for the Joint Transport Committee is contained within the existing financial resources available. Any allowances paid to Members from the constituent local authorities in attending a committee will be a matter for each of the constituent local authorities and their respective remuneration panels.
- 7.2 Independent Members remuneration will continue to be paid in line with current arrangements.

8. Legal Implications

- 8.1 The Joint Transport Committee is required to make arrangements to enable relevant decision-making responsibilities, overview and scrutiny arrangements, audit arrangements and associated functions to be fulfilled. These responsibilities arise under the Combined Authorities (Overview and Scrutiny Committees, Access to Information and Audit Committees) Order 2017 and the Openness of Local Government Body Regulations 2014, as well as the provisions for the Order creating NECA and the recent Newcastle Upon Tyne, North Tyneside and Northumberland Combined Authority (Establishment and Functions) Order 2018. The proposals set out in this report comply with these requirements.

9. Key Risks

- 9.1 There are no specific risk management implications arising from this report.

10. Equality and Diversity

- 10.1 There are no specific equality and diversity implications arising from this report.

11. Other Impact of the Proposals

- 11.1 The proposals comply with the principles of decision-making. Relevant consultation processes have been held where applicable.

12. Appendices

- 12.1 Appendix A: Confirmed Committees and Membership 2021/22.

13. Background Papers

- 13.1 Newcastle Upon Tyne, North Tyneside and Northumberland Combined Authority (Establishment and Functions) Order 2018
- 13.2 The Durham, Gateshead, South Tyneside and Sunderland Combined Authority Order 2014 (SI 2014 No.1012) as amended by the Second Order

14. Contact Officers

- 14.1 Mike Barker, Monitoring Officer – Transport.
mikebarker@gateshead.gov.uk Tel: 0191 433 2100

15. Sign off

- Head of Paid Service: ✓
- Monitoring Officer: ✓
- Chief Finance Officer: ✓

16. Glossary

JTC – Joint Transport Committee

NECA – North East Combined Authority

NTCA – North of Tyne Combined Authority

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Joint Transport Committee, Overview and Scrutiny Committee

Membership: 14 (8 Members from North East Combined Authority and 6 Members from the North of Tyne Combined Authority)

| Authority: | Member (Political Affiliation) | Substitute Member (Political Affiliation) |
|--|---|---|
| Appointments from the North East Combined Authority: | | |
| Durham | Councillor Craig Martin (Lib Dem) | Councillor Bev Coult (Lib Dem) |
| | Councillor Chris Lines (Ind) | Councillor Bill Moist (Ind) |
| Gateshead | Councillor John Eagle (Labour) | To be confirmed |
| | Councillor Ian Patterson (Lib Dem) | Councillor Christopher Ord (Lib Dem) |
| South Tyneside | Councillor Linda McHugh (Labour) | Councillor Margaret Meling (Labour) |
| | Councillor Peter Boyack (Labour) | Councillor Stephen Dean (Labour) |
| Sunderland | Councillor Peter Walker (Labour) | Councillor Linda Williams (Labour) |
| | Councillor Doris MacKnight (Labour) | Councillor David Snowden (Labour) |
| Appointments from the North of Tyne Combined Authority: | | |
| Newcastle | Councillor Oskar Avery (Labour) | Councillor Stephen Fairlie (Labour) |
| | Councillor Greg Stone (Lib Dem) | Councillor Matt Folker (Lib Dem) |
| North Tyneside | Councillor Muriel Green (Labour) | Councillor Sandra Graham (Labour) |
| | Councillor Sarah Day (Labour) | Councillor Willie Samuel (Labour) |
| Northumberland | Councillor Gordon Castle (Conservative) | Councillor Ian Hutchinson (Conservative) |
| | Councillor Cath Homer (Conservative) | Councillor John Beynon (Conservative) |

Joint Transport Committee, Audit Committee

Membership: 7 (4 Members from North East Combined Authority and 3 Members from the North of Tyne Combined Authority)

| Authority: | Member (Political Affiliation) | Substitute Member (Political Affiliation) |
|--|---------------------------------------|--|
| Appointments from the North East Combined Authority: | | |
| Durham | Councillor Alex Watson (Ind) | Councillor Joan Nicholson (Ind) |
| Gateshead | Councillor Marilyn Charlton (Labour) | Councillor Dot Burnett (Labour) |
| South Tyneside | Councillor Edward Malcolm (Labour) | Councillor Margaret Peacock (Labour) |
| Sunderland | Councillor Paul Stewart (Labour) | Councillor Linda Williams (Labour) |
| Appointments from the North of Tyne Combined Authority: | | |
| Newcastle | Councillor Greg Stone (Lib Dem) | Councillor Matt Folker (Lib Dem) |
| North Tyneside | Councillor Anthony McMullen (Labour) | Councillor Debbie Cox (Labour) |
| Northumberland | Councillor John Beynon (Conservative) | Councillor David Bawn (Conservative) |

Joint Transport Committee, Tyne and Wear Sub-Committee

Membership: 5 (1 Member from each Tyne and Wear constituent local authority from the North East Combined Authority area and North of Tyne Combined Authority area).

| Authority | Member | Substitute Member |
|--|----------------------------|--------------------------|
| Appointments from the North East Combined Authority: | | |
| Gateshead | Councillor John McElroy | Councillor Malcolm Brain |
| South Tyneside | Councillor Ruth Berkley | Councillor James Foreman |
| Sunderland | Councillor Claire Rowntree | Councillor Graeme Miller |
| Appointments from the North of Tyne Combined Authority: | | |
| Newcastle | Councillor Ged Bell | Councillor Joyce McCarty |
| North Tyneside | Councillor Carl Johnson | Mayor Norma Redfearn |

North East Joint Transport Committee

Date: 15 June 2021

Subject: Programme of Committee Meetings, Municipal Year 2021/22

Report of: Monitoring Officer - Transport

Executive Summary

The purpose of this report is to invite Members to agree a programme of committee meetings for the Municipal Year 2021/22.

The programme of meetings is intended to assist the Joint Transport Committee (JTC) in discharging its functions effectively. The programme has been developed in consultation with the constituent combined authorities.

Recommendations

It is recommended that the Joint Transport Committee agrees the proposed programme of committee meetings, as set out in Appendix A.

North East Joint Transport Committee

1. Background Information

- 1.1 The Newcastle Upon Tyne, North Tyneside and Northumberland Combined Authority (Establishment and Functions) Order 2018 (the Order) requires NECA and NTCA to appoint a Joint Transport Committee in accordance with Schedule 2 to exercise functions specified by the Order.
- 1.2 To support an effective discharge of those functions, the Joint Transport Committee is invited to approve a programme of committee meetings, as set out in Appendix A.
- 1.3 The proposed programme of committee meetings was developed in consultation with the constituent combined authorities and is based around key areas of work, effective reporting structure, efficiency and requirements of internal and external audit.

2. Proposals

- 2.1 The Joint Transport Committee and its committees are advised to meet according to the programme of meetings set out in Appendix A.

3. Reasons for the Proposals

- 3.1 The Joint Transport Committee is required to have an effective committee structure. The proposals would help the Joint Transport Committee to discharge its functions effectively.

4. Alternative Options Available

- 4.1 Whilst the programme of committee meetings was developed to ensure efficiency and effectiveness and no alternative options are proposed at this stage, a level of flexibility is required to enable the committees to add, rearrange or cancel meetings in accordance with demand.

5. Next Steps and Timetable for Implementation

- 5.1 If agreed, the programme of meetings will be published and shared with key stakeholders.

North East Joint Transport Committee

Potential Impact on Objectives

- 6.1 As part of decision-making processes, the Joint Transport Committee is required to have an effective committee structure. Having a programme of meetings will assist in the delivery of objectives.

7. Financial and Other Resources Implications

- 7.1 The proposed programme of meetings was designed to minimise costs whilst supporting effective governance.

8. Legal Implications

- 8.1 There are no specific legal implications arising from this report.

9. Key Risks

- 9.1 The proposed programme of meetings is aimed at assisting the Joint Transport Committee with the operation of an effective governance structure. A published programme of meetings supports the effective planning of business and decision making and supports openness and transparency.

10. Equality and Diversity

- 10.1 There are no specific equality and diversity implications arising from this report.

11. Other Impact of the Proposals

- 11.1 The proposals comply with the principles of decision-making.
- 11.2 The proposals were designed in consultation with the constituent combined authorities.

12. Appendices

- 12.1 Appendix A: Programme of Committee Meetings, Municipal Year 2021/22.

13. Background Papers

- 13.1 The Newcastle Upon Tyne, North Tyneside and Northumberland Combined Authority (Establishment and Functions) Order 2018.

North East Joint Transport Committee

13.2 The Durham, Gateshead, South Tyneside and Sunderland Combined Authority Order 2014 (SI 2014 No.1012) as amended by the Second Order.

14. Contact Officers

14.1 Mike Barker, Monitoring Officer - Transport
Email: mikebarker@gateshead.gov.uk; Tel: 0191 433 2100

15. Sign off

- Head of Paid Service: ✓
- Monitoring Officer: ✓
- Chief Finance Officer: ✓

16. Glossary

16.1 The Order - The Newcastle Upon Tyne, North Tyneside and Northumberland Combined Authority (Establishment and Functions) Order 2018.

16.2 NECA – North East Combined Authority

Joint Transport Committee
Draft Programme of Committee Meetings
Municipal Year 2021/22

| Committee | Date / Time | June 2021 | July 2021 | Sep 2021 | Oct 2021 | Nov 2021 | Dec 2021 | Jan 2022 | Feb 2022 | Mar 2022 | Apr 2022 | May 2022 | June 2022 |
|---|--------------------|------------------|------------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|------------------|
| Joint Transport Committee | Tuesday 2.30pm | 15 AGM | 13 | 21 | 19 | 16 | | 18 | | 15 | | | 21 AGM |
| Joint Transport Tyne and Wear Sub-Committee | Thursday 2pm | | 8 | 9 | | 4 | | 13 | | | 7 | | |
| Audit Committee | Wednesday 10am | 16 | | 1 | | 24 | | | | 23 | | | |
| Overview and Scrutiny Committee | Thursday 10am | | 1 | | 14 | | 16 | | | 3 | | | |

Venues: To be confirmed seven clear days before the meeting date.

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North East Joint Transport Committee

Date: 15 June 2021

Subject: Transport Plan Progress Report

Report of: Managing Director, Transport North East

Executive Summary

This report provides an update on progress made across the seven Delivery Plan categories in implementing the objectives of the North East Transport Plan and achieving the vision of 'moving to a green, healthy, dynamic and thriving north-east.'

Bus partnership development work is continuing as is progress in developing a bid to the Zero Emission Bus Regional Areas (ZEBRA) 2021-2022 scheme.

School transport funding has been confirmed up to 25th June, but the region has been asked to prepare for the possibility that no funding may be available thereafter.

Plans are well underway for our regional Active Travel Campaign, 'Go Smarter, Go Active', due to launch this summer.

A Zero Emission Vehicle policy is being developed while work continues on delivery of the Go Ultra Low taxi scheme.

Good progress is being made with implementation of schemes under the Transforming Cities and Active Travel Funds, the reopening to passengers of the Northumberland Line and the various rail expansion studies, including the proposed reopening of the Leamside line.

The Williams review of the rail system is proposing that a new public body, Great British Railways (GBR), will run the network.

Recommendations

The Joint Transport Committee is recommended to note the contents of this report.

1. Background:

The North East Transport Plan sets out a vision of 'moving to a green, healthy, dynamic and thriving north-east' through the delivery of transport improvements under seven categories:

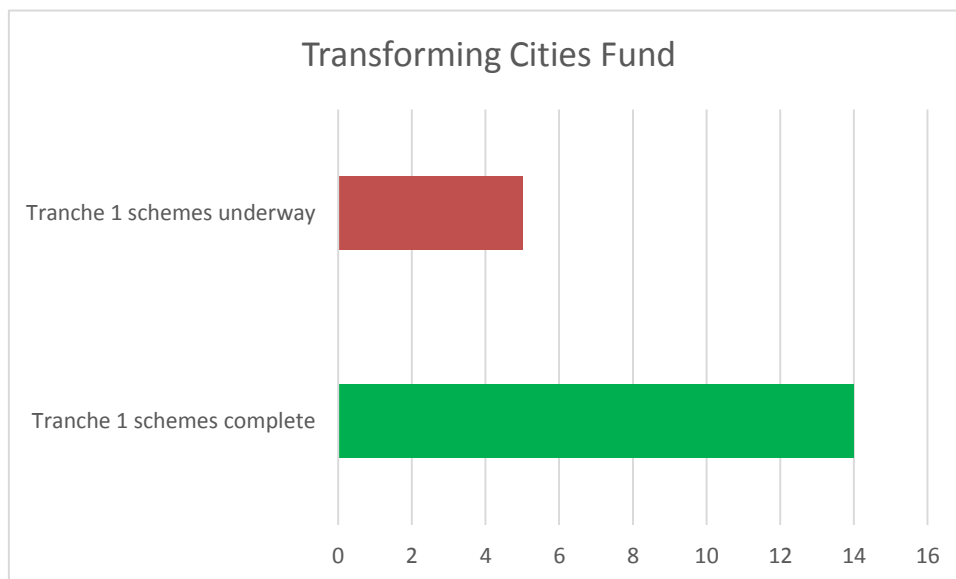
- Helping people make the right travel choice
- Upgrading north-east active travel infrastructure
- Bus, ferry and first and last mile
- Local rail and Metro
- Road infrastructure
- Maintaining and renewing our transport network
- National and international connectivity

Progress under each category is outlined below.

2. Helping people make the right travel choices

2.1 Transforming Cities Fund

14 out of 19 Tranche 1 schemes are complete, with the other five schemes well underway. There have been some delays in business case development on Tranche 2 schemes, but the programme is expected to be delivered by March 2023.



Next milestones

The Tranche 1 programme is set to be complete by the end of 2021.

An estimated six schemes will to be presented to JTC for a funding decision

in November 2021.

Key risks

Any issues with delivery could cause further delays in programme completion, however this is not expected.

Further delays in business case development could result in schemes not being delivered by March 2023. Progress continues to be monitored closely.

2.2 Intra-city Transport Fund

The Intra-city Transport Fund is a fund of circa £4.2bn over a five-year period to be shared between eight city regions from 2022 for investment in intra-city transport; our region is a candidate to access the fund, subject to appropriate Governance being in place. The region is currently undertaking an exercise to demonstrate the potential benefits of this potential long term devolved settlement for transport. This includes what could be reasonably achieved and delivered. Engagement is planned with members in the coming weeks.

Next milestones

Production of a high-level prospectus demonstrating the scale of ambition to be made available to members at the July meeting.

Key risks

Funding conditions not yet confirmed; scale of funding unknown.

2.3 Zero Emission Vehicle policy

A Zero Emission Vehicle (ZEV) Policy is being developed to set out how, working with partners, we intend to deliver the region's ZEV aspirations.

Next milestones

Policy to be submitted to the September meeting of JTC.

Key risks

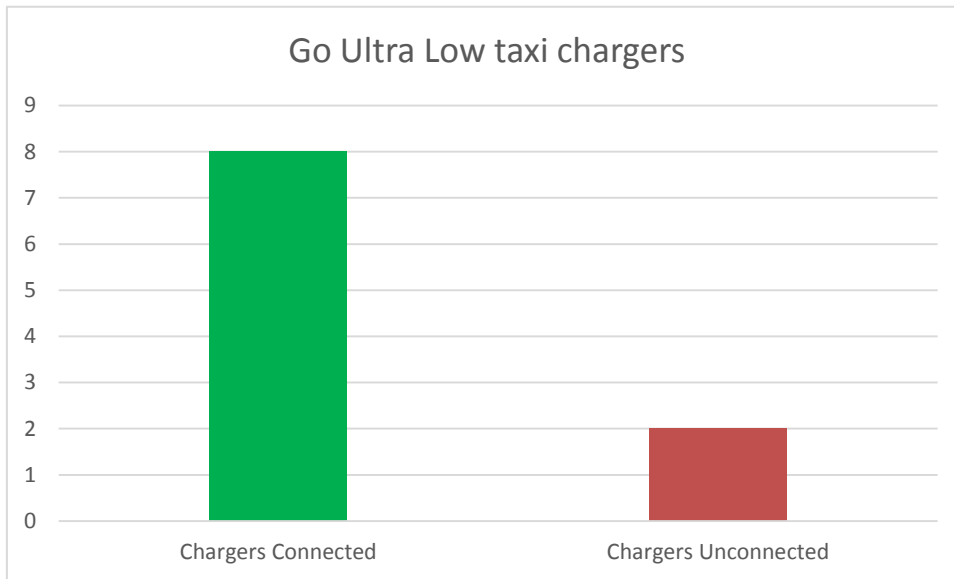
Differing strategies amongst LA7 authorities inhibit a regional approach.

2.4 Go Ultra Low NE update

The GULNE project ended on 30th May 2021. With the exception of one out of the eleven new Electrical Vehicle hubs which has yet to be commissioned, all the project deliverables are in place, including SME engagement and the Sunderland EV filling station.

2.5 Go Ultra Low taxi project

Eight of the ten dedicated chargers for the taxi and private hire industry (funded by the Office of Zero Emission Vehicles) are now connected and operational with one available in every North East local authority. The final two chargers at sites in Newcastle and North Tyneside will be connected as soon as the sites become available.



Next milestones

A number of engagement events will be held to promote the charging points to the taxi trade.

Key risks

There are issues impacting on fully implementing the schemes. Legal constraints on one site (Blandford Square, Newcastle) while another site (Coronation Street, North Tyneside) is currently in use as a Covid testing centre.

3. Upgrading north-east active travel infrastructure

3.1 Active Travel campaign

Transport North East is currently preparing a regional Active Travel Campaign – Go Smarter, Go Active - to promote our cycling and walking infrastructure. This will include a number of summer roadshows, as well as the publication of regional walking and cycling maps and a suite of itineraries for fun-filled days out across the North East region using sustainable modes.

Next milestones

The website for the campaign goes live in late June; and the first summer roadshow events are scheduled for week commencing 19th July.

Key risks

Poor / inclement weather impacting on the campaign.

3.2 Active Travel Fund

The Tranche 2 Programme is progressing well, with public consultation on a number of schemes either underway or planned. The majority of schemes are expected to be completed by March 2022, with the exception of Grey Street, which has been granted an extension by the Department for Transport to July 2022.

Next milestones

Schemes will begin delivery on-site following local consultation exercises. The first scheme due to begin delivery is the A167 Great North Cycleway Improvements (Newton Aycliffe), which will commence in July 2021.

Key risks

Timescales for project delivery or scope could be impacted if scheme designs require amendment or enhancement following consultation feedback.

4. Bus, Ferry and First and Last Mile

4.1 Bus partnership development

The national bus strategy was launched in March, setting out an ambitious vision to dramatically improve bus services (outside London) through greater local leadership. The Strategy sets out a more formal framework for partnership working between local transport authorities and local bus operators and requires that each local transport authority implement a statutory Enhanced Partnership under the Bus Services Act 2017.

Next milestones

A separate report is included on the agenda covering the bus partnership requirements, key milestones and next steps.

Key risks

The Government have linked existing bus funding, future improvement funding for buses and potentially non-bus transport funding to delivery against this strategy. Failure to comply with the national requirements risks the potential of significant funding loss for the region.

4.2 Zero Emission Bus Regional Area (ZEBRA) bid

Working with bus operators, the region will submit a bid to the Zero Emission Bus Regional Areas (ZEBRA) 2021-2022 scheme. A package of investment has been developed which focuses on a number of bus corridors which fall within air quality exceedance areas.

Next milestones

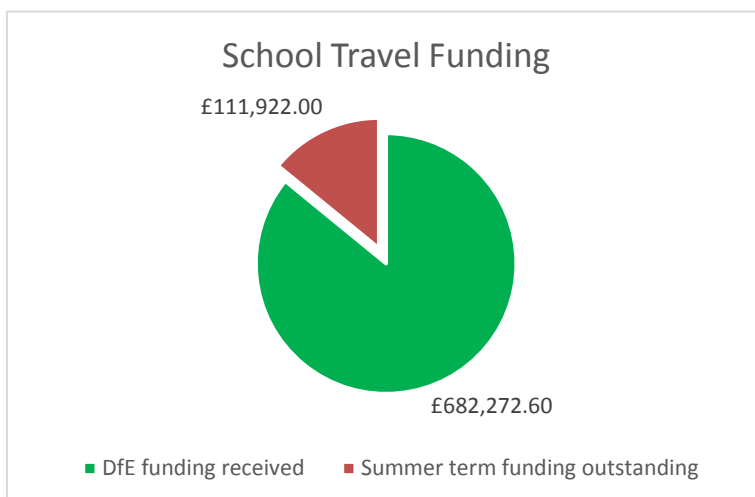
Submission of the Expression of Interest – 25th June 2021.

Key risks

Need for match funding from operators; securing funding from Government; Energy supply and delivery; manufacturing capacity for delivery.

4.3 School travel update

Additional grant funding of £682,272.60 was received from the Department for Education (DfE) for the first half of the summer term, and the region will also receive an allocation of £111,922.00 for the start of the second summer half term up until 25 June. However, we have been asked to prepare for the possibility of no further funding thereafter.



Next milestones

Current funding allocation covers costs up to 25 June. Possibility that no grant funding will be provided for the period after 25 June.

Key risks

The DfE not being clear in June what its approach to funding is for the period after 25 June, leading to difficulties in planning school travel.

4.4 Durham bus station

Work on Durham Bus Station to create a more spacious, comfortable and safe facility with funding from the Transforming Cities Fund is progressing, with demolition to be completed in June 2021 and the new station set to be opened by Autumn 2022.

Next milestones

Demolition to be completed in June 2021.

Key risks

None at this stage.

5. Local rail and Metro

5.1 North East Rail and Metro strategy

Initial data gathering and drafting underway, Steering Group appointed, first workshop in June.

Key milestones

Super feedback week – 21 June. Initial feedback from key stakeholders on draft version of the strategy.

Key risks

Working to tight deadlines, encompassing both Metro & heavy rail into a single strategy.

5.2 Rail expansion studies

South of Tyne & Wearside (SoT&W) – Phase1 interim report covering Pelaw to the IAMP to be submitted to TNE this month for review

Next milestones

SoT&W Phase 3 (Washington – South Hylton) study commencing.

The region's Restoring Your Railways 3 ('RYR3') bids are awaiting a government decision on outcomes.

Key risks

Delays to original timescales.

5.3 Metro funding

Nexus are in ongoing correspondence with DfT and the Treasury to provide evidence for the importance of continuing support for Metro to assist in the economic and social recovery of the region. Funding currently only confirmed to 21 June 2021.

Next milestones

Current funding allocations only covers costs up to 21 June 2021.

Key risks

No funding confirmed before the 21st June 2021; funding confirmed does not fully cover deficit between fare box and operating costs.

5.4 Local rail

May 2021 timetable has been introduced and performance remains strong. The message remains: "Travel safe / with confidence". Staff training continues.

The issues with yaw damper cracking affecting Class 800 express trains should not impact the NE and are being addressed.

Next milestones

Summer marketing campaigns are to be introduced to help attract passengers back to the network.

Key risks

Financial impact if passenger numbers remain depressed.

5.5 Northumberland line

Work continues with DfT/ Northern to develop an integrated ticketing solution to feed into Full Business Case. Network Rail Early Enabling works have started on site. Planning applications (4 new stations & footbridge) have been submitted.

Next milestones

Planning applications need to be submitted for the remaining stations. The line is anticipated to reopen to passengers in 2024.

Key risks

The Northumberland Line project has a full governance structure in place which monitors and mitigates any risks to delivery through workstream level risk registers.

5.6 Leamside line

Work is ongoing and the project team will consider Williams Review & Integrated Rail Plan outcomes. Arup have been appointed to undertake Umbrella Strategic Outline Business Case study (USOBC). Land Value Capture report is being reviewed, RYR3 bid outcome still awaited.

Next milestones

Next Programme Board on 30th July.

USOBC stakeholder engagement through June.

Key risks

National, regional and local stakeholders all have an interest in the shape that the Leamside Line project might take; the project will need to manage any conflicting stakeholder or potential funder aspirations.

6. Road infrastructure

6.1 Self-driving” vehicles

The government announced in April that “self-driving” vehicles could be allowed on UK motorways later this year. The cars would use automated lane-keeping system (ALKS) technology that controls the position and speed of a car in a single lane. Drivers will not be required to monitor the road or keep their hands on the wheel.

Next milestones

Possible introduction of this technology later in 2021.

Key risks

Concerns have been raised about the safety and practicality of this

technology.

7. Maintaining and renewing our transport network

7.1 Tyne Tunnel

Work is continuing on the Tyne Pass scheme to introduce barrierless travel for Tunnel users.

Refurbishment of the Tyne Pedestrian and Cycle Tunnels (TPCT), including the installation of the new inclined lifts is ongoing.

A separate confidential report to JTC will provide a full TT2 update for members.

Next milestones

The Tyne Pass scheme is planned to go live in December 2021.

More details will be provided in a separate confidential report that is on the agenda for this meeting, and a further report to the JTC Tyne and Wear Sub-Committee ('TWSC') on 8 July.

Key risks

There is a delivery risk on the Tyne Pass scheme, but that rests with TT2. There will be a reputational risk to NECA if the scheme is not delivered on time or produces adverse outcomes for users.

There are delivery and financial risks to the Authority in relation to the TPCT works, these will be outlined in more detail within the aforesaid reports to JTC and TWSC.

8. National and international connectivity

8.1 Transport for the North

TfN Board is consulting on a new Decarbonisation Strategy, which proposes a close to zero date of 2045 for carbon emissions from surface transport in the North.

Next milestones

Public consultation to take place this summer

Key risks

Differing rates of progress in reducing carbon across northern authorities; challenging nature of actions required to meet target.

8.2 Williams Review / Integrated Rail Plan (IRP)

The Williams Review White Paper was published on 20 May 2021. A new public body, Great British Railways (GBR), will run the network. New partnerships between GBR and local and regional government will be established to give local leaders a greater say in how the railways are run in their area.

Next milestones

Progress is continuing with a refreshed North East Rail and Metro Strategy which will reflect the White Paper.

The IRP is expected to follow in the coming months.

Key risks

Delays to the publication of the IRP could affect the timescales for our East Coast Main Line and Leamside campaigns.

2022 East Coast Main Line timetable

- 8.3** Awaiting sight of timetable details but concerns over capacity.

Next milestones

Consultation with stakeholders will start on 8th June for 8 weeks

Key risks

Risk of losing an hourly Transpennine express service due to limited capacity on route.

9. Proposals

- 9.1 This report is for information. Members are asked to note the contents of the report.

10. Reasons for the Proposals

- 10.1 This report is for information purposes.

11. Alternative Options Available

- 11.1 Not applicable to this report.

12. Next Steps and Timetable for Implementation

- 12.1 Next steps are set out under each respective item.

13. Potential Impact on Objectives

- 13.1 Successful delivery of the various transport schemes and investment proposals outlined in this document will assist the JTC in delivering its objective to maximise the region's opportunities and economic potential.

14. Financial and Other Resources Implications

14.1 The report provides an update and overview of progress against the seven Delivery Plan categories in implementing the objectives of the North East Transport Plan and achieving the vision of 'moving to a green, healthy, dynamic and thriving north-east.'

14.2 The North East Transport Plan includes proposed / required investment totalling £7 billion to achieve the aims and ambitions of the JTC, the majority of which is dependent on future funding decisions by central government. The financial and other resource implications aligned to the plan were agreed as part of the Transport Budget and Levies 2021/22 report to the JTC on 19 January 2021 and in subsequent reports to augment and amend the budget as appropriate.

15. Legal Implications

15.1 There are no legal implications arising directly from this report, which is for information only.

16. Key Risks

16.1 Appropriate risk management arrangements are in place for each programme of work overseen by the delivery agencies responsible. Key risks are set out under each respective item.

17. Equality and Diversity

17.1 Successful delivery of schemes to improve public transport, walking and cycling will help to address transport-related social exclusion and create a fairer society.

18. Crime and Disorder

18.1 There are no specific crime and disorder implications associated with this report.

19. Consultation/Engagement

19.1 Many of the schemes and proposals outlined in this report have been, or will be, the subject of engagement with appropriate stakeholders or the wider public.

20. Other Impact of the Proposals

20.1 No specific impacts.

21. Appendices

21.1 1 - Progress on Key Performance Indicators.

22. Background Papers

22.1 None.

23. Contact Officers

23.1 Tobyn Hughes, Managing Director, Transport North East
Tobyn.hughes@nexus.org.uk

24. Sign off

- Head of Paid Service: ✓
- Monitoring Officer: ✓
- Chief Finance Officer: ✓

25. Glossary

25.1 RYR3 – The Restoring Your Railway fund is a government programme that provides funding to restore lost rail connections to communities. Assessment of Round 3 bids is currently underway.

All other abbreviations or acronyms are explained in the report.

Appendix 1

Progress on Key Performance Indicators

| <u>KPI</u> | <u>Direction of travel</u> | <u>Key insight</u> |
|---|----------------------------|--|
| <p><u>Sustainable Travel</u> 33% of journeys made by public transport, walking and cycling.</p> <p>Data Source: DfT National Travel Survey 2019, published August 2020.</p> | No Change | An updated National Travel Survey for 2020 has not yet been released for comparison. Other data sources have Metro and bus use as below pre-covid levels, however cycling numbers are up |
| <p><u>Public transport accessibility</u> 45% People within 25 minutes of key employment, education and retail sites by public transport.</p> <p>Data source: Commissioned analysis August 2020</p> | No Change | Data is not yet available to update |
| <p><u>Climate action</u> CO2 emissions per capita: 1.7 tonnes CO2 emitted per person annually using transport.</p> <p>Data source: UK local authority and regional CO2 emissions statistics: 2018, Department for Business, Energy & Industrial Strategy, published June 2020</p> | No Change | National data has not yet been released for 2019 or 2020 |
| <p><u>Take up of ultra-low emission vehicles (ULEVs)</u></p> | Increase | 0.48% of licenced vehicles in the region are classed as ultra-low emission (end of |

| | | |
|---|------------------|--|
| <p>0.34% Proportion of licenced vehicles in our region that are classed as ultra-low emission (end of 2019)</p> <p>Data source: Department for Transport vehicle licensing statistics</p> | | <p>2020). Data published May 2021.</p> |
| <p><u>Air quality</u></p> <p>For 2019, the highest, median, hourly nitrogen dioxide reading was 26.9ug/m3 occurring in the morning traffic peak.</p> <p>Data source: Department for Environment Food & Rural Affairs Automatic Urban and Rural Network (AURN)</p> | <p>Decrease</p> | <p>For 2020, the highest, median, hourly nitrogen dioxide reading was 20.1ug/m3 occurring in the morning traffic, however this is expected to be unusually low due to lock down restrictions</p> |
| <p><u>Network performance</u></p> <p>In terms of efficiency, in 2019 our regional network scored 71.8%</p> <p>Data source: Department for Transport congestion data.</p> | <p>No Change</p> | <p>Data is not yet available to update – should be available by the next update.</p> |
| <p><u>Motor vehicle traffic</u></p> <p>Estimated vehicle miles per head in our region in 2019 5,077</p> <p>Data source: Department for Transport National Travel survey, published August 2020</p> | <p>No Change</p> | <p>National data has not yet been released for 2020</p> |
| <p><u>Road safety: numbers</u></p> | <p>Decrease</p> | <p>In the three-year rolling</p> |

| | | |
|---|-----------------|---|
| <p><u>killed and seriously injured</u></p> <p>Numbers killed and seriously injured (KSI) three year rolling average (2016-17 to 2018-19) 778</p> <p>Data source: Traffic Accident Data Unit</p> | | <p>average from 2017 to 2020 there were 704 KSI.</p> |
| <p><u>Road safety: number of slight injuries</u></p> <p>Number of slight injuries three year rolling average (2016-17 to 2018-19) 3,275</p> <p>Data source: Traffic Accident Data Unit</p> | <p>Decrease</p> | <p>In the three-year rolling average from 2017 to 2020 there were 2,934 slight injuries</p> |

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North East Joint Transport Committee

Date: 15 June 2021

Subject: Active Travel Fund Update

Report of: Managing Director, Transport North East

Executive Summary

This report covers three recent regional active travel activities and proposals:


- Go Smarter, Go Active – a marketing campaign which uses £319,500 from Active Travel Fund Tranche 2 and aims to encourage the use of our region’s cycling and walking infrastructure. The campaign consists of three projects: cycling and walking maps, itineraries for days out by active travel across the North East and a series of cycling roadshow events across the region. The campaign will launch this summer.
- Notification from the Department for Transport (DfT) that our region is to receive Active Travel Capability funding for 2021/22 to an indicative value of £2,157,597. The region has submitted details of what the funding would be spent on to the DfT. Confirmation of the exact funding allocation is expected imminently
- Proposal to establish an Active Travel Partnership with the aim of improving relationships, strengthening regional funding bids and enhancing the quality of our business cases, such as those for the Intracity Fund.

Recommendations

The North East Joint Transport Committee is recommended to:

- Note the progress being made to deliver the Go Smarter, Go Active campaign;
- Note that proposals for spending the Active Travel Capability Funding indicative allocation have been submitted to the Department for Transport (DfT);
- Agree to the principle of establishing of an Active Travel Partnership.

| | |
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| 1. | Background Information |
| 1.1 | <p>Walking and cycling increased considerably during the Covid 19 pandemic and the JTC is working to support this rise and take forward active travel activities which support all five of our Transport Plan objectives:</p> <ul style="list-style-type: none"> • Carbon neutral North East; • Overcome inequality and grow our economy; • Healthier North East; • Appealing sustainable transport choices; • Safe, secure network. |
| 1.2 | <p>This report covers three recent regional active travel activities and proposals:</p> <ul style="list-style-type: none"> • Go Smarter, Go Active marketing campaign to encourage the use of our region's cycling and walking infrastructure • notification from the Department for Transport (DfT) that our region is to receive Active Travel Capability revenue funding for 2021/22 to an indicative value of £2,157,597 • Proposal to establish an Active Travel Partnership to strengthen relationships between the JTC and groups campaigning for active travel. |
| 2 | Go Smarter, Go Active Campaign |
| 2.1 | <p>At the meeting on 16 March 2021 JTC agreed to use £319,500 from Active Travel Fund Tranche 2 to deliver a marketing campaign to encourage the use of our cycling and walking infrastructure to explore our region, improving health and boosting the local economy.</p> |
| 2.2 | <p>The regional campaign consists of three projects:</p> <ul style="list-style-type: none"> • Strongly advertised active travel itineraries for days out by active travel across the North East; • Maps of our cycling and walking network which show people how they can plan enjoyable active travel journeys around the region, encouraging them to step outside their comfort zone and try something new; • Regional cycling road show events and interactive workshops which will show people that cycling is fun and enjoyable and boost confidence. |

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| 2.3 | <p>The campaign is now being taken forward and will be branded as 'Go Smarter, Go Active' and will use the following logo.</p>  |
| 2.4 | <p>A microsite is being produced ahead of the campaign launch in June 2021. Members of the public will be able to visit the site to book on to roadshow events, download copies of the itineraries and maps and get in touch with the team. Social media channels are also being set up to support the campaign.</p> |
| 2.5 | <p>An event supplier has been procured to organise the roadshow events which will run for a total of seven weeks, one week in each local authority. Venues for the roadshows are currently being finalised.</p> |
| 2.6 | <p>Updated cycling and walking maps for the North East are currently being developed and these will be available as interactive pdfs. The detail of the maps is still being determined but they are expected to cover Tyne and Wear and larger towns in Durham and Northumberland. The pdfs will be available on the Go Smarter, Go Active microsite where users will be able to download them. They will also be provided to Local Authorities.</p> |
| 2.7 | <p>A procurement exercise is currently underway to obtain a supplier to produce a series of itineraries for fun filled days out across the region. The itineraries are due to be published late summer 2021 and will help people discover new parts of the North East in an active way.</p> |
| 2.8 | <p>A steering group is being formed to oversee the project and will focus on providing a strategic steer for the three projects of the campaign.</p> <p>Working Groups are being formed to focus on the delivery detail of the projects.</p> |
| 2.9 | <p>Marketing activity is being planned to ensure that we engage with as many people as possible during the campaign. Additional temporary resource has been provided within Transport North East to coordinate the campaign and monitor benefits of the activities.</p> |
| 3. | Active Travel Capability Fund |
| 3.1 | <p>On 3 March 2021 we received notification from the Department for Transport (DfT) that our region is to receive Active Travel Capability revenue funding for 2021/22 to an indicative value of £2,157,597.</p> |

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| | <p>The DfT has specified that the funding is to be used for schemes which support the following objectives:</p> <ul style="list-style-type: none"> • To support the development of infrastructure projects to the new standards set out, including updating previous plans (such as LCWIPs) as necessary; • To promote increased levels of physical activity through walking and cycling for everyday journeys; • To support access to new and existing employment, education and training. |
| 3.2 | The DfT has placed conditions on the receipt of funding and the region was required to submit proformas setting out what the funding would be spent on and providing assurance that proposals offer value for money. |
| 3.3 | The proformas have been completed, with inputs from each LA7 authority and were submitted to the DfT on 19 April 2021 for review. Our region's submission included behaviour change activities to encourage active travel, community active travel events, cycle training, led walks and cycle rides, bike / e-bike loan schemes and marketing / comms activities. It also contained measures to support the development of Local Cycling and Walking Infrastructure Plans (LCWIPs) and the forthcoming North East Active Travel Strategy. |
| 3.4 | Confirmation of the exact funding allocation is expected imminently, after which JTC approval will be sought for its use including onward distribution to Local Authorities. |
| 4. | Active Travel Partnership |
| 4.1 | Feedback received during public engagement over the North East Transport Plan suggested that the region might benefit from strengthened relationships between the JTC and groups campaigning for active travel. It is therefore proposed to establish a regional Active Travel Partnership to achieve this. The role and remit of the Active Travel Partnership will be wider than that of the Go Smarter, Go Active Steering Group which will focus solely on the campaign. |
| 4.2 | <p>The Active Travel Partnership will provide the opportunity for:</p> <ul style="list-style-type: none"> • best practice identification; • sharing of knowledge from outside the region; • peer review of business cases and funding bids; • sharing of expertise and experiences; and • sharing of data, evidence and research findings. |
| 4.3 | Sharing of the above will improve relationships, strengthen regional funding bids and enhance the quality of our business cases, such as those for the Intracity |

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| | Fund. |
| 5. | Proposals |
| 5.1 | <p>It is proposed that JTC:</p> <ul style="list-style-type: none"> • Notes the progress being made to deliver the Go Smarter, Go Active campaign; • Notes that proposals for spending the Active Travel Capability Funding indicative allocation have been submitted to the Department for Transport (DfT); • Agrees to the principle of establishing an Active Travel Partnership. |
| 6. | Reasons for the Proposals |
| 6.1 | The paper is for noting. |
| 7. | Alternative Options Available |
| 7.1 | The paper is for noting. |
| 8. | Next Steps and Timetable for Implementation |
| 8.1 | The Go Smarter, Go Active campaign will launch in July. |
| 8.2 | JTC will be notified of the Active Travel Capability Funding allocation when confirmation is received from DfT. |
| 8.3 | The role and remit for the Active Travel Partnership and list of potential members will be drafted. |
| 7. | Potential Impact on Objectives |
| 7.1 | The delivery of the Go Smarter, Go Active campaign, the formation of a regional Active Travel Partnership and the receipt of Active Travel Capability Funding will assist the JTC in achieving the objectives set out in the Transport Plan and support the vision of 'moving to a green, health, dynamic and thriving North East.' |
| 8. | Financial and Other Resources Implications |
| 8.1 | A budget of £319,500 has been allocated to the Go Smarter, Go Active campaign. This is funded through the region's Active Travel Fund allocation. |
| 8.2 | The JTC is expecting to receive an indicative allocation of £2,157,597 from the Active Travel Capability Fund, which will provide an opportunity to fund revenue activities aimed at increasing active travel and support the development of Local Cycling and Walking Infrastructure Plans (LCWIPs) and the North East Active Travel Strategy. JTC approval will be sought for its use including onward |

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| | distribution to Local Authorities |
| 9. | Legal Implications |
| 9.1 | As the report is for information only, there are no legal implications arising directly from the recommendations. Suppliers involved in the Go Smarter, Go Active campaign have obtained appropriate insurance policies. |
| 10. | Key Risks |
| 10.1 | No risks identified. |
| 11. | Equality and Diversity |
| 11.1 | Measures are being taken to ensure that Go Smarter, Go Active promotional activities and materials are suitable for as many people as possible. |
| 12. | Crime and Disorder |
| 12.1 | There are no specific crime and disorder implications arising from this report. |
| 13. | Consultation/Engagement |
| 13.1 | All local authorities across the NECA and NTCA areas have been engaged in the development of the Go Smarter, Go Active campaign. |
| 14. | Other Impact of the Proposals |
| 14.1 | No specific impacts. |
| 15. | Appendices |
| 15.1 | None |
| 16. | Background Papers |
| 16.1 | (Public Pack)Agenda Document for North East Joint Transport Committee, 16/03/2021 14:30 (northeastca.gov.uk) |
| 17. | Contact Officers |
| 17.1 | Rachelle Forsyth-Ward, Strategic Transport Advisor, rachelle.forsythward@transportnortheast.gov.uk |
| 18. | Sign off |
| | <ul style="list-style-type: none"> • The Proper Officer for Transport: ✓ • Head of Paid Service: • Monitoring Officer: ✓ |

| | |
|------------|--|
| | <ul style="list-style-type: none"> • Chief Finance Officer: ✓ |
| 19. | Glossary |
| | <p>DfT – Department for Transport</p> <p>LCWIPs- Local Cycling and Walking Investment Plans</p> <p>NECA – North East Combined Authority</p> <p>NTCA – North of Tyne Combined Authority</p> |

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North East Joint Transport Committee

Date: 15 June 2021

Subject: Bus Partnerships

Report of: Managing Director, Transport North East

Executive Summary

The region's bus network is a vital part of our transport system and has a key role to play in the region's recovery from the pandemic, supporting the decarbonising agenda and helping to rebuild our economy.

At its meeting on 16 March 2021 JTC agreed to the commencement of a project to consider how a voluntary bus partnership could be progressed, building on the shared objectives and principles of the North East Joint Transport Committee and the region's bus operators (NEBus).

The National Bus Strategy (NBS) was also launched in March, setting out an ambitious vision to dramatically improve bus services (outside London) through greater local leadership. The NBS sets out a more formal framework for partnership working between local transport authorities and local bus operators and requires that each local transport authority implement a statutory Enhanced Partnership under the Bus Services Act 2017.

The NBS requires that, by the end of June 2021, local transport authorities must commit to developing an Enhanced Partnership and publish a statutory notice to that effect. Furthermore, they must develop and publish a Bus Service Improvement Plan by the end of October 2021, setting out the outcomes they wish to see delivered through the Enhanced Partnership; and negotiate and implement an Enhanced Partnership by April 2022.

The Bus Service Improvement Plan should show how Local Transport Authorities and local bus operators will work with local highway authorities and local communities to plan and deliver a bus network where buses are more frequent, more reliable, easier to understand and use, better coordinated and cheaper, providing a fully integrated service with simple, multi-modal tickets, more bus priority measures, high-quality information for all passengers in more places, and better turn-up-and-go frequencies that keep running into the evenings and at weekends.

The government have announced funding of £3 billion nationally to support the policies set out in the NBS. Government have been clear that local transport authorities and bus operators that do not follow the NBS guidance will not be eligible for any of the new funding and will face losing existing funding streams that support bus services. In addition, government have stated that they will also take account of a region's performance against the NBS when considering funding allocations for wider, non-bus local transport schemes.

The National Bus Strategy and funding support gives us the opportunity to start delivering against the objectives set out in the region's Transport Plan; and will help buses to play an even greater part in enabling economic growth, achieving better and more equal outcomes for communities and contributing to healthy and vibrant places to live and work in our region.

This report therefore seeks approval to confirm to government JTC's commitment to developing an Enhanced Partnership, agree to publishing a statutory notice of intent to prepare the Enhanced Partnership and to note the requirement to involve Local Authorities as statutory highway authorities in the partnership.

Recommendations

The North East Joint Transport Committee is recommended to:

- i. Confirm to government their commitment to developing an Enhanced Partnership in line with the National Bus Strategy requirements.
- ii. Agree to issue formal notice of intent to prepare an Enhanced Partnership Plan and Schemes to bus operators, and to begin consultation with local bus operators in order to pursue it.
- iii. Note the requirement for Local Authorities as statutory highway authorities for the area to commit to be part of the partnership program.

1. Background Information

- 1.1 Public transport has a key role to play in the region's recovery from the pandemic, supporting the decarbonising agenda and helping to rebuild our economy. Buses are the region's most used form of public transport, demonstrated by the 162.4 million bus passenger journeys undertaken in 2018/19.
- 1.2 Only 68% of north east households own a car (compared to 74% nationally), and 30% of north east bus journeys are to employment. Buses are also vital in enabling people to reach education, shopping, health appointments and other services.
- 1.3 The newly adopted North East Transport Plan makes commitments to supporting bus services, helping them travel faster and more reliably around the region, increasing coverage in more rural and isolated communities, and making them more attractive to passengers.
- 1.4 JTC members have been developing a positive and collaborative approach with bus operators, which has already produced several important developments that will benefit both bus passengers and stakeholders. At its meeting in March, JTC agreed to the establishment of more formal partnership working with the region's bus operators.

2. JTC vision for bus services

- 2.1 The NE Transport Plan identifies the immediate task of securing the survival of the region's bus network through financial support from government and local authorities as the UK emerges from the Covid pandemic.
- 2.2 Beyond this, the Transport Plan sets out the need to make buses more attractive and more efficient by helping them to travel faster and more reliably around the region, through tackling pinch points in our towns and cities.
- 2.3 Major investment is needed in long-term solutions, including radical new rapid bus corridors offering faster, more reliable journeys through bus priority measures. Greater use of Park and Ride can help remove car traffic from town and city centres where congestion and pollution are highest.
- 2.4 Changing how road space is used to help buses move more quickly together with lower fares, greener vehicles and better frequencies can make a step change in both the perception and use of buses in our region.
- 2.5 We also need to increase the coverage of the network through greater use of "on demand" services offering alternatives for more isolated communities, and work with employers to support sustainable travel for shift working and night-time employment.
- 2.6 Integrated multi-operator and multi-modal ticketing needs to be available for passengers across the whole of the region. Better information, joined up real-time and journey planning systems that make the best use of technology, together with incentives to change travel choices can support bus use and help to encourage car

users away from their vehicles.

2.7 The National Bus Strategy gives us the opportunity to start delivering against these aspirations and will help buses to play an even greater part in enabling economic growth, achieving better and more equal outcomes for communities and contributing to healthy and vibrant places to live and work in our region.

3. National Bus Strategy

3.1 The National Bus Strategy (NBS) was launched during March, setting out government's vision for the future of bus services outside London. It follows the announcement in February 2020 of a £3 billion transformational fund to help level up buses across England towards London standards.

3.2 The strategy is wide ranging and ambitious in its aims to avoid a car led recovery by making buses cheaper and more attractive; to not only get overall patronage back to its pre-COVID-19 level, but then to exceed it.

3.3 The NBS indicates that the former commercially-led model for buses is broken and sets out a requirement for all Local Transport Authorities (LTA) to commit to working with bus operators to develop an Enhanced Partnership (EP), except where they have already started the Franchising process (i.e. Greater Manchester).

3.4 A key element of creating an Enhanced Partnership will be the requirement for each LTA to prepare a Bus Service Improvement Plan (BSIP). We are awaiting detailed guidance from the Department for Transport (DfT) on the preparation of BSIPs. However, as a minimum, they will need to address the following areas:

- Focus on delivering the bus network that LTAs want, addressing current under/over provision and integration with other modes
- Set targets for journey time and reliability improvements
- Identify where bus priority measures are needed
- Set out pressures on the road network, air quality and carbon reduction targets
- Set out plans and costs for fares, ticketing and modal integration
- Consider passenger safety, security and accessibility
- Consider how an integrated network serves schools, health, social care, employment and other services
- Take into account the views of local people
- Commit to a Bus Passenger Charter

3.5 Further details on the types of measures referred to in the NBS and what this may mean to the JTC area are set out in appendix 1.

3.6 The BSIP will need to set out how current arrangements meet or fall short of aspirations, and highlight what improvements need to be delivered through the EP and the investment plans of LTAs and bus operators. It is likely that the BSIP will become a bidding document for future DfT investment in bus services.

4. Key Milestones

4.1 The National Bus Strategy sets out the following key milestones

- 30 June 2021 – JTC and Bus Operators to formally commit to developing an EP
- 31 October 2021 – JTC to publish Bus Service Improvement Plan
- April 2022 – Enhanced Partnership to be operational

5. Benefits and limitations of an Enhanced Partnership

5.1 There are some good examples both within the region and across the country where improvements have been achieved through LTAs and bus operators working in close partnership.

5.2 An Enhanced Partnership can be used to introduce requirements in relation to local services that have one or more stopping place in the area. It can also include requirements for the LTA and/or Local Highway Authority (LHA) to provide facilities or take measures to support bus services in the area.

5.3 The EP scheme can specify vehicle requirements such as the age of vehicles, emissions standards, accessibility requirements or branding of services. The scheme can also set standards for information provision in relation to publicising of local services, fares or ticketing arrangements.

5.4 The regional already operates a voluntary system of service change dates. This could be formalised through an EP to limit the occasions upon which operators may change the timing or routing of local services.

5.5 In relation to ticketing, the Enhanced Partnership scheme can (subject to compliance with competition legislation) specify the price for multi-operator ticketing products within the area. However, under an EP, the operators remain free to set the price for their own single operator ticket products; and these can be used to compete with the regional multi-operator tickets.

5.6 An EP scheme can be used to set requirements on operators to limit the frequency or specify the timing of services on routes that are considered to be over-provided. This may help to make efficiency savings across the network. The NBS suggests that resources freed up from over-provided routes could then be used to boost under provision elsewhere. However, the EP scheme cannot compel operators to provide any additional services or make changes to existing services outside of the above cases.

5.7 Given the current uncertainty around post-Covid patronage recovery, it is unclear what appetite operators would have or what mechanisms government consider would be available to LTAs to ensure that freed-up resources are put towards the delivery of a more comprehensive 'socially necessary' network of services.

5.8 An EP is essentially a negotiated document between the LTA and local bus operators, with considerable flexibility to include measures that deliver benefits to passengers. However, there may be limitations on what members may wish to

see included in the EP in terms of compliance with competition legislation and commercial viability for operators. A further exploration of such measures is included for consideration in appendix 4.

6. Franchising

- 6.1 Franchising is an established model for providing bus services used in London and in many cities and regions across Europe. The mayor of Greater Manchester has recently decided to introduce a bus franchising scheme, with franchising bus services due to be introduced in stages between 2023 and 2025. In a franchising scheme, the LTA determines the details of the services to be provided; where they run, when they run, the standards of the services and the fares charged. Typically bus operators provide their services under contract to the LTA and no other services can operate in the franchised area without the agreement of the franchising authority.
- 6.2 The automatic power to introduce a bus franchising scheme is currently only available to Mayoral Combined Authorities (MCA). Local Transport Authorities (other than MCAs) that wish to pursue franchising would need to seek the approval of the Secretary of State for Transport. The NBS states that such authorities would need to satisfy the Secretary of State that they have the capacity and resources to deliver franchising.
- 6.3 Since franchising can take several years to implement, and the government wishes to deliver change for all parts of the country quickly, the NBS requires that all LTAs (other than MCAs already pursuing franchising) commit to establishing an Enhanced Partnership by April 2022. Therefore introducing a bus franchising scheme as an alternative to an Enhanced Partnership scheme is not an option that is open to the JTC in the short term.
- 6.4 The JTC may wish to consider investigating the feasibility, benefits and risks of pursuing a bus franchising scheme in the longer term. However this would require additional resources to be made available.

7. Risk and Reward

- 7.1 The government have made it clear that future funding for buses will be linked to each LTA meeting the requirements set out in the National Bus Strategy.
- 7.2 From 1 July 2021, all government funding streams for buses will only be available to LTA areas that have committed to entering an EP with their bus operators. This includes:
- Covid-19 support grants for buses for the remainder of this financial year (these have covered well over £500k per week in our region during lockdown)
 - Ongoing government bus subsidy to operators (BSOG) and Local Authority BSOG, which covers approx. 7% of operating costs
 - New transformational bus funding from the £3bn pot, and other funding opportunities e.g. for zero emission buses

- 7.3 The government also hints that non-bus transport funding may be linked to an LTAs delivery against the strategy, for example active travel and Local Transport Plan (LTP) funding.
- 7.4 It is important that the region responds positively and develops an ambitious BSIP to maximise the opportunity for funding to improve the regions bus network and deliver against the commitments in the regional Transport Plan.
- 7.5 It is also clear that non-compliance with the government's agenda would inevitably lead to large-scale cuts to the bus network, both immediately without Covid-19 funding and longer term without BSOG or any access to transformation funding.

8. Commitment to Enhanced Partnership

- 8.1 At its meeting on 16 March 2021 JTC agreed to the commencement of a project to consider how a voluntary bus partnership could be progressed, building on the shared objectives and principles of the North East Joint Transport Committee and the region's bus operators (NEBus).
- 8.2 Considering the revised requirements set out in the NBS, JTC are now recommended to confirm to government their commitment to developing a statutory Enhanced Partnership with the region's bus operators (NEBus).
- 8.3 The government's Enhanced Partnership guidance sets out a legal process that includes a requirement for the LTA to give formal notice of its intention to prepare an EP and invite all the local bus operators to participate in that process. JTC are recommended to give approval to the issuing of a formal notice and begin consultation with local bus operators on the preparation of an EP. A copy of the formal notice is included at appendix 2.

9. Responsibilities on Highway Authorities

- 9.1 A key tenet of the NBS is the need to make buses more attractive by making them faster and more reliable. The NBS highlights the important role of local highway authorities in the delivery of infrastructure measures needed to speed buses through congested areas.
- 9.2 The government is also committed to revising the statutory Network Management Duty for local highway authorities to make it a requirement for them to consider enhancing bus reliability in their area.
- 9.3 There is an expectation in the NBS that bus lanes will be provided on any road where there is a frequent bus service, congestion and physical space to install one. A whole network approach is recommended including traffic signals, bus gates and clear consistent signing.
- 9.4 Work undertaken in the region as part of the Transforming Cities Fund identified an initial tranche of eighteen high use bus corridors and analysed bus real-time locational data to better understand where buses were being held up on the highway network. It is suggested that these corridor proposals would be the

initial focus of infrastructure development for the BSIP/EP.

- 9.5 Where the Enhanced Partnership includes the provision of highway facilities or the making of a Traffic Regulation Order it will be a requirement for the Local Authority to be a formal party to the statutory EP scheme.
- 9.6 It is worth stressing that any commitments made by an authority (or by bus operators) once a formal EP is 'made' are legally binding. An authority that does not fulfil its obligations can face legal action by the bus operators in the courts. (A bus operator in breach of agreement could face registrations being cancelled or wider action by the traffic commissioner).
- 9.7 Given the pressures on local authority budgets, it may be that the delivery of certain highway authority schemes or measures would need to be included in the agreement as conditional on funding being made available from central government.

10. Project Resources

- 10.1 A separate report on the agenda covers the resourcing requirements to develop the Bus Service Improvement Plan and Enhanced Partnership.

11. Next Steps

- 11.1 An overarching timeline for the project is included as appendix 3. This will be developed into a full project document. The key dates, and therefore the flow of the process, is driven by JTC and JTC/NEbus meeting dates, and so in time it will be expanded to include key dates for Local Highway Authorities and Bus Operators.
- 11.2 Local Highway Authorities should note the dates in bold, which will lead to consultation and discussion, and possibly decisions, within their own authority.
- 11.3 A Project Board will be formed to monitor and drive the project forward. This will include bus operators and other key stakeholders so that these outputs can be achieved collaboratively and in the spirit of Partnership.

12. Reasons for the Proposals

- 12.1 A successful Enhanced Partnership will help to achieve the objectives of the Transport Plan, in particular a green recovery through the provision of attractive forms of sustainable transport.

13. Alternative Options Available

- 13.1 Option 1 – The North East Joint Transport Committee may accept the recommendations set out in the report.
- Option 2 – The North East Joint Transport Committee may not accept the recommendations set out in the report.
- Option 1 is the recommended option.

14. Next Steps and Timetable for Implementation

- 14.1 The next steps together with an overarching timeline for the project is included as appendix 3.

15. Potential Impact on Objectives

- 15.1 A successful Enhanced Partnership will help deliver the objectives of the Transport Plan, and in particular a green recovery through the provision of attractive forms of sustainable transport.

16. Financial and Other Resources Implications

- 16.1 The financial and resource implications are set out in a separate report on the agenda.

17. Legal Implications

- 17.1 The Enhanced Partnership follows a statutory framework requiring legal notices and formal agreements. The EP will become legally binding on the LTA, LHAs and Bus Operators. Specialist legal advice has been sought in support of the project, particularly in relation to subsidy control and competition law matters.

18. Key Risks

- 18.1 Failure to comply with the requirements of the National Bus Strategy requirements would lead to the removal of existing bus funding support and risk causing severe damage to the existing bus network in the region.

There are also risks in relation to future government funding and the return in bus passenger numbers following the pandemic, such that JTC aspirations for the bus network may be difficult to achieve.

19. Equality and Diversity

- 19.1 The Bus Service Improvement Plan and Enhanced Partnership will be developed in line with the Public Sector Equality Duty.

20. Crime and Disorder

- 20.1 The Bus Service Improvement Plan and Enhanced Partnership will address issues of safety and security to ensure that bus services are safe and perceived to be safe by all.

21. Consultation/Engagement

- 21.1 Informal discussions have already taken place with JTC members and bus operators, and separately with DfT representatives. Wider consultation will be required with bus operators, passenger groups, both bus users and non-users, and other key stakeholders as the Bus Service Improvement Plan is developed. The process for developing and implementing an Enhanced Partnership includes

statutory consultation with the public, bus operators and other key stakeholders.

22. Other Impact of the Proposals

- 22.1 An Enhanced Partnership offering an attractive bus network would benefit the environment and economy through a green recovery and provision of realistic sustainable transport choices

23. Appendices

- 23.1 Appendix 1 - National Bus Strategy - minimum requirements for Bus Service Improvement Plan
Appendix 2 - Notice of Intent to Prepare an Enhanced Partnership Plan and Schemes
Appendix 3 - North East Enhanced Bus Partnership Key Milestones
Appendix 4 - Key outputs JTC may wish to see in the Enhanced Partnership

24. Background Papers

- 24.1 Agenda Item 10 “Bus Partnership” - North East Joint Transport Committee, 16 March 2021

25. Contact Officers

- 25.1 Philip Meikle, Transport Strategy Director, Transport North East
Philip.Meikle@transportnortheast.gov.uk Tel: 07725 533615

26. Sign off

- The Proper Officer for Transport: ✓
- Head of Paid Service:
- Monitoring Officer: ✓
- Chief Finance Officer: ✓

27. Glossary

NBS – National Bus Strategy

BSIP – Bus Service Improvement Plan

EP – Enhanced Partnership

LTA – Local Transport Authority

MCA – Mayoral Combined Authority

LHA – Local Highway Authority

NEBus - the North East Bus Operators' Association

DfT – Department for Transport

LTP – Local Transport Plan

BSOG – Bus Service Operators Grant

National Bus Strategy - minimum requirements for Bus Service Improvement Plan

| Minimum requirements for BSIP / EP | Key issues for JTC / NEBus partnership |
|---|--|
| <p>Cover the full LTA area, addressing differing needs (eg rural and urban)</p> | <p>The BSIP/EP Plan needs to set out a clear vision for bus service improvements and must cover the whole JTC area</p> <p>Accompanying actions to achieve the vision can be set out in one or more EP Scheme(s). This could facilitate a different focus between say; urban and rural areas, or between each highway authority for infrastructure schemes</p> |
| <p>Focus on delivering a bus network that LTAs want, addressing current under and over provision and integration with other modes</p> | <p>The BSIP should include Service Level Policy, setting out the daytime, evening and Sunday service levels that different communities need</p> <p>The BSIP should consider high frequency radial routes, superbuss networks, expanded use of park & ride, and demand responsive transport for rural areas</p> <p>The partnership can help to facilitate the removal of duplication between operators on over-provided routes. The NBS suggests that this resource could boost under provision elsewhere</p> |
| <p>Set targets for journey times and reliability improvements</p> | <p>Sharing of data will help inform improvement measures (alongside data sharing agreements re confidentiality issues / aggregating etc)</p> <p>Implementation of traffic management policies and highway schemes will improve bus journey times and will encourage patronage growth / modal shift</p> |
| <p>Identify bus priority measures, including consideration of Bus Rapid Transit</p> | <p>Build on the work undertaken for Transforming Cities Fund, which identified key bus corridors across the region that would benefit from infrastructure to speed up bus services through congested areas</p> <p>Link bus real time locational data with UTMC / traffic signal control</p> <p>Explore options for Bus Rapid Transit</p> |

| | |
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| | (BRT) routes |
| Set out pressure on the road network, air quality issues and carbon reduction targets that improved bus services could help to address | The EP scheme can specify vehicle requirements to reflect air quality and carbon reduction targets and actions Government expects improved bus services to be part of the solution to address air quality / carbon reduction through modal shift |
| Set targets for passenger growth and customer satisfaction | Build on Transport Focus annual passenger survey to target areas for improvement Monitoring of patronage recovery post-covid Sharing of patronage data and customer information will help develop greater understanding of the network and better target interventions |
| Set out plans and costs for fares, ticketing and modal integration | Fully smart, multi-operator, multi-modal ticketing options across the JTC area, with maximum fares and daily price cap Alignment of fares zones across all operators Lower fares and flat fares to attract passengers and speed up boarding |
| Consider the impact of roadside infrastructure on safety, security and accessibility | Review safety and security around bus stops and interchange points – eg lighting and cctv Work with local disability groups to address accessibility issues |
| Consider the views of local people and commit to a Bus Passenger Charter | Develop Bus Passenger Charter for NE Use of Local Bus Boards in network planning process and development of BSIP options Consultation strategy to be developed |

Notice of Intent to Prepare an Enhanced Partnership Plan and Schemes

[Date]

At its meeting on 15 June 2021, The North East Joint Transport Committee gave approval to proceed with the development of an Enhanced Partnership. The commencement of this is confirmed through this notice of the intention to prepare an Enhanced Partnership Plan and accompanying Enhanced Partnership Schemes, as required and set out in section 138F of the Transport Act 2000.

North East Enhanced Bus Partnership Draft Key Milestones

LA7 members should note dates in bold, which will lead to consultation and discussion, and possibly decisions, within their own authority.

| Date | Event | Milestone | Further notes |
|-----------------------------|--|---|--|
| 15 th June | JTC Formal Meeting | JTC agree to enter into process to establish Enhanced Partnership and issue Notice of Intent to prepare an Enhanced Partnership Plan and Schemes to bus operators | Copy of notice to be sent to DfT by the end of June to maintain ongoing COVID Bus Service Support Grant funding for region |
| 13 th July | JTC Formal Meeting | JTC Agree the document “North East Vision for Buses”, and agree that informal consultation (“The Big Bus Conversation”) should take place which will inform the BSIP process. | |
| 14th July | Public Engagement Launch (Jointly with bus operators) | Big Bus Conversation Commences | This triggers the process of dialogue with and within LA7 councils and bus operators |
| July and August | Dialogue with project stakeholders over content of BSIP and BSIP development takes place | | |
| 10 th September | | Public Engagement process closed | |
| 21 st September | JTC/NE Bus Forum | Feedback from engagement process shared and action plan to close BSIP agreed | |
| 8 th October | | BSIP Document Final Draft Closed Down | This triggers process of discussions to transition from BSIP to EP document |
| 19 th October | JTC Formal Meeting | BSIP Signed off | |
| 31 st October | | BSIP Issued to DfT | |
| 16 th November | JTC / NE Bus Forum | Heads of Terms of EP Agreed | |

| | | | |
|---|---|---|---|
| 26 th November | | Initial draft of EP document complete | |
| 14 th December | JTC Formal Meeting | Draft Enhanced Partnership Agreed for Public Consultation | This triggers the release of the draft version of the EP to: i) LA7 Members / CAs for review and any required cabinet discussion and consultation on schemes; ii) Governance within bus operators; iii) Governance within Nexus and NTL; iv) Discussion of EP by members of the public v) Due diligence on behalf of JTC |
| December 15 th (May require call in period) | Issue Statutory Notice to operators that an Enhanced Partnership Plan and Scheme have been prepared – 28 days objection period launched | | |
| January 12 th | Statutory Formal Consultation commences on content of EP, includes operators, passenger reps, LAs, competition and markets authority, police services etc | | |
| January and February | During January and early February refinement of drafting based on feedback from all parties will take place | | |
| 11 th Feb | | Advanced drafting of EP to be closed down | |
| 15 th Feb | JTC/NE Bus meeting | Agreement that EP can be achieved and proceed to iron out any final issues from consultation/stakeholder feedback/due diligence | |
| 3 rd March | | Document Production Closed Down | |
| 15 th March | JTC Formal Meeting | Agreement to enter into EP and issue Statutory Notice of intention to make a formal EP Plan | |

| | | | |
|------------------------|------------------|---------------------|--|
| | | and Scheme | |
| 25 th March | Signing Ceremony | All parties sign EP | <i>Subject to no objections to Notice of Intention to make Partnership.</i> |
| 1 st April | | EP Goes Live | <i>Subject to no objections to Notice of Intention to make Partnership .</i> |

Key outputs JTC may wish to see in the Enhanced Partnership

| Included in an EP legislation | Not included in EP legislation |
|--|--|
| Partnership Governance | |
| <p>An EP Board will be established to oversee the partnership, covering fares, network planning, performance targets, information, marketing campaigns. Local Bus Boards will assist in representing local community views</p> | |
| Fares and ticketing | |
| <ul style="list-style-type: none"> • EP can specify a range of tickets that must be available in the scheme area e.g.: <ul style="list-style-type: none"> – For through journeys requiring a change of bus – For A to B journeys on multi-operator routes – At particular times e.g. off peak – Covering particular areas e.g. zonal based fares – For use by particular groups e.g. young person, student or job seeker • EP can specify price and establish 'price cap' for multi-operator ticketing, subject to competition legislation (Note: the EP cannot mandate a price that is not commercially viable or is anti-competitive) • EP can include requirement on how tickets/payments are made available (e.g. use of interoperable smart products) • EP can include requirements on publicising fares or ticketing arrangements (e.g. a requirement to publicise multi-operator tickets on- | <ul style="list-style-type: none"> • EP cannot set the price for any type of ticket other than the multi-operator tickets • EP cannot include price controls on individual operator fares • EP does not include powers to restrict or control operators' fare changes • EP does not include power to request revenue information or operating costs from operators to explain fare changes • EP cannot mandate operator's own products to be accepted on all secured services |

| | |
|---|--|
| board every bus) | |
| Network stability and changes | |
| <ul style="list-style-type: none"> • EP can include requirements to limit changes to services or timetables to specified dates in calendar (with staggered dates for each area) (Note: this is done on a voluntary basis at present) • EP can specify limits on overall number/frequency of buses operating on over-buses routes • EP Board and local bus boards should provide the opportunity for improved dialogue/engagement on any plans for network changes • EP should facilitate greater engagement on longer term spatial planning to ensure sustainability of new housing areas, business parks, health centres, retail sites, and other developments | <ul style="list-style-type: none"> • EP cannot mandate commitment to long term operation of commercial services and has no power to require operators to share profitability of individual services or network wide operations • EP cannot mandate that bus companies operate non-profitable routes without appropriate levels of subsidy • EP Board cannot mandate operators to consult on any changes in advance of statutory change process (currently: inform LTA 28 days before Traffic Commissioner Notice 42 days in advance of service change) • EP cannot mandate operators to provide evidence of reasons for change in relation to detailed cost/benefit analysis etc • EP cannot mandate operators to consult in advance over other significant decisions that may affect bus customers or councils e.g. major changes to fleet, depot closure/expansion/relocation, relevant mergers/acquisitions/disposals/ company restructures, etc |
| Service Quality | |
| <ul style="list-style-type: none"> • EP can specify minimum engine/emission standards for vehicles operating in particular areas, or across the region • EP can specify that all buses have AVL installed and communicate to common standards for real-time information provision • EP can specify that all buses must carry ticket machines that accept smart | |

| | |
|---|---|
| <p>payments to common standards</p> <ul style="list-style-type: none"> • EP can specify on-board safety/security requirements such as provision of CCTV on all buses • EP will develop bus passenger charter giving bus users rights to certain standards of service; this must include mechanisms for redress at a local level • EP can set agreed customer response standards but cannot mandate operators to use a centralised handling process. | |
| <p>Targets and Performance</p> | |
| <ul style="list-style-type: none"> • EP can set targets for journey times, punctuality, reliability, and service standards • Local targets could be agreed for Local Bus Board areas where appropriate • Targets to be published in public facing bus Passenger Charter (subject to commercial sensitivity/aggregation) • Operators to supply such performance data as may be required to allow measurement to take place – down to individual route level • Relevant local route-level performance to be reported to Local Bus Boards • Failure of operator to comply with requirements of EP can result in penalties and/or cancellation of registration by Traffic Commissioners | <ul style="list-style-type: none"> • EP does not make provision for independent audits of both operator data and application/validity of agreed methodology • EP does not include powers to impose penalties on operators for poor performance. (Note: compliance with statutory performance requirements remains with the Traffic Commissioners) |
| <p>Information Provision</p> | |
| <ul style="list-style-type: none"> • EP can mandate sharing of operator information on passenger numbers by route, time of day and ticket type (Note: | <ul style="list-style-type: none"> • EP does not include power to request financial reporting in relation to route, depot or companywide revenue, operating |

| | |
|--|--|
| <p>commercially sensitive data is likely to require confidentiality agreements and information will need to be aggregated before being published)</p> <ul style="list-style-type: none"> • EP can seek operational performance information (e.g. highways-related causes of poor punctuality, journey speed data, etc.) to assist with development of public transport priority measures • Fleet information including vehicle and engine type to be provided to EP Board and Local Bus Boards annually | <p>costs or profitability</p> |
| Marketing and Branding | |
| <ul style="list-style-type: none"> • EP Board can determine appropriate branding applicable to the partnership and related standards • EP can mandate all buses operating in the area to carry clearly visible markings / decals bearing regional branding • EP can set standards requiring all printed and electronic information provided to customers to carry regional branding • EP Board can agree annual network-wide marketing plan, relevant market research and satisfaction surveys | <ul style="list-style-type: none"> • Joint funding for network wide marketing, market research or customer satisfaction will be by agreement only |

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North East Joint Transport Committee

Date: 15 June 20201

Subject: Bus Partnerships Project Resources

Joint Report of: Managing Director Transport North East and Chief Finance Officer

Executive Summary

This report sets out proposals for the establishment of a project team to deliver an Enhanced Bus Partnership (EP) for our region. The paper outlines the budget required to deliver an EP in line with the national bus strategy; and sets out how this budget should be funded.

Recommendations

The North East Joint Transport Committee is recommended that a project team be established to deliver an EP; and agree a gross budget of £1.684m (inclusive of 20% contingencies) to deliver the project, with LA7 authorities providing a contribution of up to £844k in the amounts set out in Paragraph 2.4 of this report.

1. Background Information

- 1.1 The government's new National Bus Strategy (NBS) sets out a framework for partnership working between local transport authorities and local bus operators. It presents an opportunity for the JTC to start to achieve some of its transport objectives insofar as they relate to buses and local transport integration, though there are also risks associated with assuming increased responsibility without sufficient funding with which to deliver these objectives.
- 1.2 The government has been clear that local transport authorities and local bus operators that do not work constructively together will be penalised. Existing funding streams that support bus services and a wide range of transport activities may be reduced or fall away completely.
- 1.3 It is therefore both urgent and essential that the JTC negotiates and implements an Enhanced Bus Partnership (EP) by April 2022, with a Bus Service Improvement Plan (BSIP), to be produced by the end of October 2021, setting out what improvements will be delivered by the EP. This is a major task, and a team of suitably experienced and skilled staff will be required to achieve the milestones and implement a successful partnership that delivers meaningful change for bus travelers and communities in the region.
- 1.4 We had previously planned to deliver a "Bus Recovery Partnership" in the current financial year, aimed at improved joint working between the local bus operators, the JTC, and LA7 Local Authorities, with budget provision of £240,000 funded from JTC reserves. Although this would have been a significant piece of work in its own right, the scale and breadth of the tasks required to develop an EP and the corresponding BSIP is far larger and should not be under-estimated.

2. Proposals

- 2.1 It is proposed that a project team is formed to deliver and mobilise the EP. A variety of roles are required including the appointment of a project leader, a project manager, technical roles and the time of comms officers and legal support.
- 2.2 The project will also require access to external professional services and technical support, such as specialist legal advice (e.g. UK subsidy control and competition law), economic and financial modelling. There is also likely investment in bus industry IT software as well as the costs of running public engagement exercises.
- 2.3 The estimated total cost of the project is £1.684 million. £240,000 has already been made available as a contribution from JTC reserves. £100,000 of capability funding has been made available from the DfT and £500,000 has been made available by Nexus to offset the contributions due from the Tyne and Wear authorities, leaving a funding gap of £844,000 for the project.
- 2.4 Transport North East continue to explore means of narrowing this funding gap however it is inevitable that additional funding support will be required from the 7 local authorities. The contributions are outlined below, assuming that further funding cannot be secured from any other source, with contributions apportioned 50% on

equal shares and 50% on population shares across the LA7:

| | |
|--|-----------------|
| Durham | £274,689 |
| Gateshead | £69,869 |
| Newcastle | £81,758 |
| North Tyneside | £70,569 |
| Northumberland | £204,694 |
| South Tyneside | £63,828 |
| Sunderland | £78,793 |
| Total Potential Contribution Required | £844,200 |

2.5 The contributions recognise the fact that the Nexus contribution is on behalf of Tyne and Wear local authorities only and this has been deducted from the applicable councils' contributions.

2.6 If Transport North East are able to secure additional resources from Government or and/or other sources, contributions from the LA7 members will be reduced in the same proportion as outlined.

3. Reasons for the Proposals

3.1 The proposals are necessary to make proportional resource available to prepare a high quality BSIP, and secure and mobilise an effective partnership for the region with bus operators.

3.2 Financial contributions from LA7 authorities are necessary because there are insufficient funds available in the Transport Strategy Unit budget or within the JTC reserves to fund this project and it is essential that the additional capacity is secured to deliver this unforeseen strategy as well as the existing work programme to deliver the objectives of our region's transport plan.

4. Alternative Options Available

4.1 Option 1: JTC accept the recommendation set out in this report.

4.2 Option 2: JTC choose to reject the recommendation and ask that the majority of other activities within the Transport Strategy Unit cease so that resource and capacity from the unit can be diverted to work almost exclusively on the EP project. If this approach were to be taken, JTC should note that access to professional support and expertise would be limited affecting the quality of the EP.

4.3 JTC are recommended to support Option 1.

5. Next Steps and Timetable for Implementation

5.1 Recruitment of the project team and procurement of services will commence with immediate effect, applying due processes where appropriate.

5.2 LA7 local authorities will be requested to release funds to the Transport Strategy Unit as soon as practicable.

6. Potential Impact on Objectives

6.1 Formation of an EP is wholly aligned with the objectives of the Transport Plan, and is a vehicle to deliver many of the initiatives outlined in the plan.

7. Financial and Other Resources Implications

7.1 The financial and resource implication of the project are discussed in the main body of this report. In summary, the estimated total cost of the project is £1.684 million, with only £240,000 available as a contribution from JTC reserves. £100,000 of capability funding has been made available from the DfT and £500,000 has been made available by Nexus to offset the contributions due from the Tyne and Wear authorities, leaving a funding gap of £844,000 for the project

7.2 The contributions required from the LA7 constituent authorities have been apportioned 50% on equal shares and 50% on population shares across the LA7 and are set out at paragraph 2.4.

8. Legal Implications

8.1 An EP requires JTC, highways authorities and bus operators to enter into legally binding agreements. The recommendation in this paper will secure the necessary resource to ensure that the legal implications of the project are fully understood and managed.

9. Key Risks

9.1 The total project cost of £ 1.684m includes a 20% contingency to mitigate the following risks:

- Unforeseen project costs;
- Resolving objections placed to the EP which would otherwise frustrate the process

10. Equality and Diversity

10.1 Our region's transport plan seeks to allow everyone to access transport in our region. The EP project supports this aspiration.

11. Crime and Disorder

11.1 A safe and secure network is an objective of our region's transport plan. The EP project supports this objective.

12. Consultation/Engagement

12.1 The financial contributions and the method of apportionment outlined in this paper have been discussed with the Chief Finance Officers of each constituent authority. The proposals also have the support of the Heads of Transport of the LA7 constituent authorities.

13. Other Impact of the Proposals

13.1 NA

14. Appendices

14.1 NA

15. Background Papers

15.1 "Bus Back Better", the national bus strategy for England.

15.2 [Bus Back Better \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)

16. Contact Officers

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17. Sign off

- The Proper Officer for Transport: ✓
- Head of Paid Service: ✓
- Monitoring Officer: ✓
- Chief Finance Officer: ✓

18. Glossary

BSIP - Bus Service Improvement Plan

DfT – Department for Transport

EP - Enhanced Bus Partnership

JTC – Joint Transport Committee

LA7 - the seven Local Authorities which make up the Joint Transport Committee area; Durham, Gateshead, Newcastle, North Tyneside, Northumberland, South Tyneside and Sunderland.

NBS - National Bus Strategy

By virtue of paragraph(s) 3 of Part 1 of Schedule 12A
of the Local Government Act 1972.

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