



## North East Joint Transport Committee

Tuesday, 18th October, 2022 at 2.30 pm

Meeting to be held in the Bridges Room , Gateshead Civic Centre, Regent Street, Gateshead,  
NE8 1HH

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## AGENDA

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	Page No
1. <b>Apologies for Absence</b>	
2. <b>Declaration of Interests</b>	
Please remember to declare any personal interest where appropriate both verbally and by recording it on the relevant form (and submit it to the Democratic Services Officer). Please also remember to leave the meeting where any personal interest requires this.	
3. <b>Decision Notice from the Tyne and Wear Sub-Committee</b>	
The meetings of the Tyne and Wear Sub-Committee held on 12 July and 8 September 2022 were inquorate so no decisions could be made.	
4. <b>Minutes of the meeting held on 12 July 2022</b>	<b>3 - 8</b>
5. <b>Transport Plan Progress Report</b>	<b>9 - 20</b>
6. <b>North East Bus Partnership</b>	<b>21 - 112</b>
7. <b>Transport Budget 2023/2024</b>	<b>113 - 124</b>
8. <b>North East Active Travel Strategy Update</b>	<b>125 - 128</b>
9. <b>Date of Next Meeting</b>	
The next meeting will take place on Tuesday 15 November at 2.30pm in the Whickham Room, Gateshead Civic Centre.	

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## **NORTH EAST JOINT TRANSPORT COMMITTEE**

### **DRAFT MINUTES FOR APPROVAL**

**DATE:** 12 JULY 2022

Meeting held: Bridges Room, Gateshead Civic Centre

### **COMMITTEE MEMBERS PRESENT:**

Councillor: M Gannon (Chair)

Councillors: E Scott, K Kilgour, R Wearmouth, and E Gibson

### **IN ATTENDANCE:**

Statutory Officers: M Barker (Monitoring Officer – Transport)  
P Darby (Chief Finance Officer)  
T Hughes (Managing Director, Transport North East)

Officers: M Wilson, M Jackson, D Gittins, J Bailes, R Birch, M Kearney, E Goodman, A Graham, H Jones, J Sparkes, G Mansbridge, R Forsyth-Ward, G Kelly and R Patterson

### **1. APOLOGIES FOR ABSENCE**

Apologies for absence were received from Cllr Carl Johnson, Cllr Glen Sanderson, Mayor Jamie Driscoll and Patrick Melia.

### **2. DECLARATIONS OF INTEREST**

There were no declarations of interest.

### **3. MINUTES OF THE PREVIOUS MEETING HELD ON 14 JUNE 2022**

The minutes were agreed as a correct record subject to the wording being amended in Item 8, paragraph 1 to read;

“The Chair invited Mr D Shaw, representing SENRUG and Railfuture North East to speak to the Committee regarding the North East Rail and Metro Strategy. Mr Shaw advised the Committee that the organisations he was representing were

generally supportive of the proposals within the Strategy despite the fact that it did not include some projects that the groups felt were important. The groups would continue to lobby for these new projects to be included at a later stage but there was still a clear need to produce a shorter and more 'user friendly' version of the current strategy for public consumption. This should include a section providing a much better description of the local rail and Metro journeys that would be possible once all of the projects in the strategy had been completed. In addition, the groups had identified a number of 'quick wins' including a local service on the ECML to the north of Newcastle and an express service to Teesside using the ECML and the Stillington Line. These would not require substantial unfunded infrastructure changes and would help to bolster the credibility of the strategy."

#### **4. 2021/22 REVENUE BUDGET AND CAPITAL PROGRAMME OUTTURN**

The Committee received a report on the outturn position in relation to the 2021/22 Transport Revenue Budget and Transport Capital Programme.

It was reported that there was an underspend on the Retained Transport Levy budget of £0.100m.

Durham County Council, Northumberland County Council and Nexus underspent against the revenue grant awarded by £0.935m, £0.589m and £9.395m. These underspends were retained by the three bodies. The Nexus underspend included exceptional and one off items totalling £5.14m.

Tyne Tunnel usage was higher than forecast. This resulted in an increase in retained reserves to circa three months revenue or circa £10m at 31 March 2022.

The Transport Capital Programme Outturn 2021/22 was £113.112m, £28.8m below the revised budget. The capital programme had been largely funded by government grant, together with £10.5m of reserves.

An overview of programmes was provided in the report to the Committee and it was confirmed that as at 31 March 2022 the JTC reserves totalled £30.902m. £29.969m being earmarked for specific projects, including £9.8m in relation to the Tyne Tunnels, and £933,000 in an unallocated general reserve.

**RESOLVED:** The North East Joint Transport Committee agreed to note the report.

#### **5. 2022/23 REVENUE BUDGET AND CAPITAL PROGRAMME UPDATE AND 2023/24 BUDGET SETTING PROCESS**

Committee received a report showing the initial forecast of outturn for the 2022/23 Transport Revenue and Capital budgets.

The Nexus outturn position showed that it is still expecting to need to use £5.6m of reserves to balance the budget for the year. The forecast however showed that

expenditure would be £10.6m above budget, due to increased energy costs, additional security costs on the Metro and additional bus subsidies to mitigate the impact of bus service reductions implemented by the operators. These additional costs had been offset by further efficiency savings in year and the receipt of additional one off government grant funding.

Tyne Tunnel usage has returned to pre-pandemic levels. There was a forecast £230,000 contribution from reserves for the pedestrian and cycle tunnel.

It was forecast that there will be a £123,000 overspend for the TNE team, mainly due to staffing costs, other than that the forecast is largely in line with the original budget. The additional staffing costs were being mitigated by additional grant income.

The Capital Programme updated forecast was noted. The capital programme had been updated to reflect the underspends carried over from 2021/22 and additional grant funding secured since the budgets were set. Total capital expenditure was now forecast to be £317.8m in year - £38m more than the original budget.

The committee were provided with an overview of the proposed approach for the 2023/24 budget setting process, leading up to the JTC Committee meeting on 17 January 2023 where the budget would need to be agreed,

**RESOLVED:** The North East Joint Transport Committee:

- (i) Noted the report;
- (ii) Agreed the revised budget and capital programme for 2022/23 which takes into account grant funding awarded since the original budget was set and slippage and reprofiling arising from the 2021/22 outturn;
- (iii) Noted the proposed budget setting process for 2023/24 and beyond, including the key dates for the Committee to consider and ultimately agree budget proposals for next year.

## **6. TRANSFORMING CITIES FUND TRANCHE 2 – GRANT FUNDING AGREEMENTS**

The Committee received a report seeking approval to allocate £3,225,660 of funds from the Transforming Cities Fund to the Nexus Metro Park and Ride Enhancements scheme, subject to successful appraisal through the North East Transport Assurance Framework.

It was confirmed that the business case is being considered and the scheme has a strong strategic case offering value for money.

If agreed, £80m of TCF funds would be committed, leaving £23.6m in the remaining devolved pot to allocate.

**RESOLVED:** The North East Joint Transport Committee;

- (i) Approved the Metro Park and Ride Enhancements scheme and released the associated £3,225,660 of funds from the TCF Devolved Pot to enable the project to commence.
- (ii) Instructed officers to prepare and sign a Grant Funding Agreement with Nexus for the delivery of the Metro Park and Ride Enhancements Scheme.

## **7. TRANSPORT PLAN PROGRESS REPORT**

The Committee received an update report on progress in relation to the objectives of the North East Transport Plan. The new Metro fleet is on target to deliver the first new Metro train to the region by the end of the calendar year.

In terms of the Bus Partnership, the Enhanced Partnership Plan and Scheme were submitted to the DfT on 30 June 2022. Feedback is awaited before formal proposal and confirmation of funding.

Bus and Metro passenger numbers have recovered well but there are still a proportion of passengers missing. As the government has confirmed that not further Covid support funding will be paid after October, it is likely that further reductions will be made to bus service levels and frequencies.

It was confirmed that eight out of the ten dedicated EV chargers for the taxi and private hire industry under the Go Ultra Low taxi project, are now live. It is expected that the final two chargers will go live over the summer.

A decision by government over whether to proceed with the A1 Morpeth to Ellingham dualling scheme has been delayed until December 2022. The Committee supported a swift conclusion to this as a priority for the area.

**RESOLVED:** The Committee noted the contents of the report.

## **8. NORTH EAST 'MAKING THE RIGHT TRAVEL CHOICE' STRATEGY – AGREEMENT TO CONSULT**

The Committee considered a report seeking agreement to progress to consultation on 'Making the Right Travel Choice' Strategy.

The strategy aims to encourage car users to switch one journey per week to public transport, walking or cycling. This could result in 200 million additional trips per year being made by sustainable transport, thus improving the environment and the health of local people.

It was noted that 1 in 4 adults in the region are classified as physically inactive, this could be improved through sustainable travel. The strategy will also reduce

the number of cars on the roads and the level of emissions. It was estimated that over 90 million car trips are under one mile, therefore this provides an opportunity for those journeys to be switched to sustainable travel.

The strategy focuses on behaviour change and through research findings, eight personas have been developed to help people identify with and use them as a guide.

Subject to JTC approval, consultation will commence from 20 July 2022 until 14 September 2022. The proposed approach to the consultation is through a public engagement campaign to understand what help is needed for car users to switch one journey a week, and a stakeholder consultation on the draft strategy itself. The findings from the consultation will help develop the strategy and help understand which areas to focus on. The findings will be reported to JTC in October.

The Committee agreed this was a realistic approach to encourage increased use of sustainable travel and suggested incentivising people may be beneficial.

**RESOLVED:** The North East Joint Transport Committee:

- (i) Granted approval to proceed with the public engagement campaign;
- (ii) Agreed to undertake consultation on the draft Making the Right Travel Choice Strategy with stakeholders.

## 9. DELEGATIONS TO THE PROPER OFFICER FOR TRANSPORT

The Committee received a report seeking delegation to the Proper Officer for Transport for the creation of new posts below the level of Deputy Chief Officer to carry out its transport function.

**RESOLVED:** The North East Joint Transport Committee agreed to the following delegation to the Proper Officer for Transport:

*The creation of posts below the level of Deputy Chief Officer to carry out its transport function, subject to the availability of budget provision.*

## 10. DATE AND TIME OF THE NEXT MEETING

The next meeting of the Joint Transport Committee will be held on 13 September 2022 at 2.30pm, venue to be confirmed.

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## North East Joint Transport Committee

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**Date:** 18 October 2022

**Subject:** Transport Plan Progress Report

**Report of:** Managing Director, Transport North East

### Executive Summary

This report provides an update on progress made across a number of 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.’

Work continues to plan on the new Metro fleet with the first train on target to be delivered to the North East by the end of the year. The 12 week line closure between Pelaw and South Shields to facilitate the Metro Flow project commenced on 12 September 2022.

Public transport played a crucial part in achieving a successful Great North Run in September, with both Metro and the Shields Ferry transporting large numbers of runners and spectators between the start and finish and home at the end of the event.

A pilot scheme has been launched offering young people (18 to 25) who have recently left local authority care in Newcastle and Gateshead free travel on local bus and Metro services across the region.

A regional Decarbonisation-led Levelling Up fund bid was submitted on 4 August 2022, focusing on the introduction of more electric buses and more EV charging points across the region. We expect to hear the outcome of this bid in Autumn 2022.

Following an invitation from Active Travel England, the region submitted a Capability and Ambition Fund bid totalling £1,413,507 on 30 September 2022, focusing on support for local authorities to design and develop Active Travel schemes.

The government’s Growth Plan, published on 23 September 2022, states that government will act to accelerate a list of infrastructure projects, including a number of transport schemes in this region.

Following the Prime Minister’s commitment to “deliver Northern Powerhouse Rail in full”, the region will continue to emphasise the importance of NPR as a means to bring together the major economic centres of the North, with full re-opening of the Leamside Line as a fundamental and immovable component of NPR.

Consultation on the 'Making the Right Travel Choice' strategy took place between July and September. 1008 responses were received and these are now being analysed.

Gateshead Council are one of 11 areas to receive funding for a social prescribing pilot enabling GPs to prescribe active travel for their patients.

### **Recommendations**

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

## 1. Background Information

- 1.1 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 policy areas. Recent developments in the transport field are discussed below, organised by policy area.

## 2. Public transport, travelling by bus, Metro, ferry and on demand public transport

- 2.1 Metro Work continues to plan on the new Metro fleet with the first train on target to be delivered to the North East by the end of the year.

The replacement of Tanners Bank Metro bridge in North Shields was completed during July, on time and to budget. The replacement bridge assists in providing better access to the Fish Quay regeneration area and was delivered in partnership with North Tyneside Council.

Nexus has taken ownership of the freight line in South Tyneside and the 12 week line closure between Pelaw and South Shields commenced on the 12<sup>th</sup> of September to facilitate the Metro Flow project.

Nexus was proud to plan a crucial part in a successful Great North Run in September, Both Metro and the Ferry played a role in transporting runners and spectators between the start and finish and home at the end of the event. Positive feedback on the service was received from customers and stakeholders.

JTC approved the award of funding for the Smart and Digital car parks project which will deliver an improved customer experience at Metro car parks around the network.

- 2.2 Free travel to care-experienced young people - Young people (18 to 25) who have recently left local authority care in Newcastle and Gateshead will now be offered free travel on local bus and Metro network across the region. They will be provided with a Pop smart card with an annual Network One season ticket. This will allow them to access employment and further education without having to worry about travel costs.

This has been funded as a pilot scheme, a first of its kind in the country, with funding from the NHS's North East and North Cumbria Integrated Care Board. If the scheme is successful we will look to extend this to all eligible young people in the region through funding from the Governments Bus Service Improvement Plan.

- 2.3 Bus partnership development - Following the submission of the draft Enhanced Partnership (EP) Plan and Scheme to the Department for Transport (DfT) at the end of June 2022 we have received formal feedback from the DfT. We have worked with the DfT and partners to make the required changes to the drafting and are awaiting formal agreement to the wording and confirmation of funding award.

2.4 Bus services - The DfT confirmed on 19 August that Bus Recovery Grant (BRG) funding would be extended for 6 months to avoid large scale service deregistrations across the country in October. The funding covers buses only.

DfT also announced on 3 September that they will be capping all single bus tickets at a maximum of £2 for a 3 month period from January 2023. They estimate that this will reduce the cost of an average single ticket by 30%. For the North East this will have the greatest impact on longer distance journeys with most city region journeys already falling below or at this cap level.

As with the BRG extension this is a bus only measure and does not cover the Metro. Nexus have been challenged by the Tyne and Wear Sub-Committee to see if they can match the offer.

2.5 Levelling up Fund - A regional Decarbonisation-led transport bid was submitted on 4 August 2022. The bid comprises the electrification of 52 buses, together with a package of electric vehicle charging (92 chargers). We expect to hear the outcome of this bid in Autumn 2022 and, if successful, improvements will be in place by Spring 2025.

2.6 Capability and Ambition Fund - A Capability and Ambition Fund bid was submitted on behalf of the region on 30 September following an invitation from Active Travel England.

The bid totalled £1,413,507 and was comprised of a package of £1,136,871 of funds for capability activities heavily focusing on funding to support local authorities to design and develop Active Travel schemes. A further £276,636 has been sought for behaviour change initiatives including expanding cycle training provision under the Go Smarter Go Active branding and regionwide communication, engagement and marketing of events and activities to promote uptake.

2.7 Growth Plan - The government's Growth Plan, published on 23<sup>rd</sup> September, states that government will act to accelerate a list of infrastructure projects, through planning reform, regulatory reform, improved processes or other options to speed up their development and construction, including through development consent processes. North East transport schemes identified in the Plan are:

- A167 (M) Tyne Bridge and Central Motorway
- A186 Tyne and Wear Safer Road Scheme
- A690 County Durham Safer Road Scheme
- A66 - Northern Transpennine
- A1 dualling – Morpeth to Ellingham
- A689 Corridor Improvements - Wynyard and Hartlepool (partly relates to County Durham)
- Northern Powerhouse Rail
- Northumberland Line

### **3. Connectivity beyond our boundaries**

- 3.1 Rail update - Rail services in the region continued to be affected by strike action during the summer, with no Northern Rail services operated on 18 and 20 August. The latest punctuality and cancellation figures on both Northern and Transpennine services have both declined compared to the last period, and are also worse than the equivalent period last year.

Network Rail have completed the draft Strategic Outline Business Case (SOBC) for the 7<sup>th</sup> / 8<sup>th</sup> path on the East Coast Main Line. This is currently under review.

An eight page North East Rail and Metro Strategy summary document was published in September 2022, while work is continuing on the SOBC for the South of Tyne and Wearside Loop.

- 3.2 Northern Powerhouse Rail - The Prime Minister stated during her leadership campaign that she would “deliver NPR in full”, which was followed by a reference in the recent Growth Plan to NPR as a scheme to be accelerated. The full NPR scheme included the full reopening of the Leamside Line as a freight diversionary route, to free up paths on the East Coast Main Line. The “NPR in full” commitment therefore offers a major opportunity for the North East.

Working in conjunction with Transport for the North, it is intended to continue to emphasise that the aim of NPR was, and remains, to bring together the major economic centres of the North, from Liverpool to Newcastle and all points in between - with re-opening of the Leamside Line as a fundamental and immovable component of NPR.

- 3.3 Transport for the North (TfN) update - Transport North East have contributed to a Rural Mobility Call for Evidence launched by TfN. We have highlighted a number of issues affecting rural mobility in the region and the work being done by TfN will help to inform their next Strategic Transport Plan, as well as assisting the Department for Transport’s development of the Future of Transport Rural Strategy.

### **4. Making the right travel choice**

- 4.1 ‘Making the Right Travel Choice’ strategy - Consultation has been taking place since July on the draft ‘Making the Right Travel Choice’ strategy. The consultation period ended on 14<sup>th</sup> September and the 1008 responses are now being analysed.

- 4.2 Go Ultra Low taxi project - Eight of the ten dedicated chargers for the taxi and private hire industry are now live. It is expected that the final two chargers in Newcastle and North Tyneside will go live imminently with orders being placed for connections.

- 4.3 LGF EV infrastructure project - Progress continues with the Local Growth Fund project to install new EV charging infrastructure at sites around the region. Plans for chargers to be installed in the car park at the front of West Denton Leisure Centre

have had to be revised as, following receipt of Levelling Up funding, the Centre and main car park are to be completely rebuilt and will not be completed until 2024. Instead, it is proposed that the chargers will be slightly re-located to the Centre's rear public car park that is shared with All Saints School and is unaffected by the redevelopment.

4.4 Transforming Cities Fund - Ten of the Transforming Cities Fund (TCF) Tranche 2 schemes are now in or soon to be in delivery, which is an uplift of two schemes since July.

4.5 Social prescribing - Gateshead Council are one of 11 local authorities that will be taking part in a new nationwide trial scheme funded by the Department for Transport to help improve patients' mental and physical wellbeing by enabling GPs to prescribe walking and cycling.

The Council will receive more than £1.4m from the £12.7m total available to help promote walking and cycling and reduce reliance on the NHS. A cycle and walking scheme for older people will be set up, as well as adult cycle training and cycling taster days.

## **5. Private transport: travelling by car and using road infrastructure**

5.1 Tyne Tunnel - Tyne Pass Appraisal - A review of the new barrierless Tyne Pass system has been carried out by Transport North East officers and was presented to the meeting of Tyne and Wear Sub Committee on 8th September.

The appraisal examined various elements of the new system and customer and stakeholder feedback over the last 9 months, looking at how TT2 has addressed the feedback and made improvements. Some recommendations for further improvements were provided.

Overall, it concluded that the original aims of the Tyne Pass scheme have been achieved – lower carbon emissions, faster journeys and modernised payment system. Negative feedback from customers is acknowledged and has been used to make improvements where possible.

However, there has been a disproportionate focus on enforcement which in fact affects only 3% of tunnel users - as 97% of users pay the toll successfully under the new system.

## **6. Transport Usage Trends**

6.1 Across the region public transport usage remains below pre-pandemic levels, with bus passenger numbers at 71% and Metro passengers at 81% of their pre-pandemic baselines. Traffic levels vary but are around the same levels as before the pandemic. Based on a selection of cycling counters in the region, for the year to date cycling numbers are 5% down from the equivalent period in 2021.

## **7. Reasons for the Proposals**

7.1 This report is for information purposes.

## **8. Alternative Options Available**

8.1 Not applicable to this report.

## **9. Next Steps and Timetable for Implementation**

9.1 Next steps are set out under the respective items, where applicable.

## **10. Potential Impact on Objectives**

10.1 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.

## **11. Financial and Other Resources Implications**

11.1 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.'

11.2 The North East Transport Plan includes proposed / required investment totalling £7billion 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.

## **12. Legal Implications**

12.1 There are no legal implications arising directly from this report.

## **13. Key Risks**

13.1 Appropriate risk management arrangements are in place for each programme of work overseen by the delivery agencies responsible.

## **14. Equality and Diversity**

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

## **15. Crime and Disorder**

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

## **16. Consultation/Engagement**

16.1 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.

## **17. Other Impact of the Proposals**

17.1 No specific impacts.

## **18. Appendices**

18.1 1 - Progress on Key Performance Indicators.

## **19. Background Papers**

19.1 None.

## **20. Contact Officers**

20.1 Tobyn Hughes, Managing Director, Transport North East

[Tobyn.hughes@nexus.org.uk](mailto:Tobyn.hughes@nexus.org.uk)

## **21. Sign off**

- 21.1
- The Proper Officer for Transport:
  - Head of Paid Service:
  - Monitoring Officer:
  - Chief Finance Officer:

## **22. Glossary**

22.1 All abbreviations or acronyms are spelled out 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></p> <p>33% of journeys made by public transport, walking and cycling.</p> <p>Data Source: DfT National Travel Survey 2019, published August 2020.</p>	Increase	<p>Data in the National Travel Survey for 2021 shows that 38% of journeys are made by public transport, walking and cycling, which is an increase on the previous year.</p> <p>The sample size for 2021 is significantly smaller than the sample for 2019, so it may be sensible to treat the exact figure with some degree of caution.</p>
<p><u>Public transport accessibility</u></p> <p>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, however, there have been no major changes to infrastructure.
<p><u>Climate action</u></p> <p>CO2 emissions per capita: 1.7 tonnes CO2 emitted per person annually using transport.</p> <p>Data source: UK local authority and regional</p>	No Change	Figures for 2019 have been released and show no change in the amount of transport related CO2 emissions.

CO2 emissions statistics: 2019, Department for Business, Energy & Industrial Strategy, published June 2021		
<p><u>Take up of ultra-low emission vehicles (ULEVs)</u></p> <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>	Increase	<p>0.8% of licenced vehicles in the region are classed as ultra-low emission (Q3 2021).</p> <p>The number of ULEVs registered in the North East increased to 8,923 at the end of Q3 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 &amp; Rural Affairs Automatic Urban and Rural Network (AURN)</p>	Decrease	<p>For 2021, the highest, median, hourly nitrogen dioxide reading was 25.5ug/m3 occurring in the morning traffic peak. This is an increase on 2020, however 2020 was expected to be unusually low. 25.5ug/m3 is lower than the baseline in 2019 – traffic levels began the year lower than pre-covid, however for much of the year they were at or above their equivalent pre-covid level.</p>
<p><u>Network performance</u></p> <p>In terms of efficiency, in 2019 our regional network scored 71.8%</p>	No Change	Data is not yet available to update

<p>Data source: Department for Transport congestion data.</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 Road Traffic Statistics, published August 2020</p>	<p>Decrease</p>	<p>In 2020 the estimated vehicle miles per head were 4,064. We can expect that 2020 will be unusually low due to travel restrictions in place as a result of the COVID-19 pandemic.</p> <p>National Travel Survey data for 2021 has vehicle miles per head reducing from 5,473 in 2019 to 3,900 in 2020 and 3,770 in 2021. The sample size for 2021 is significantly smaller than the sample for 2019, so it may be sensible to treat the exact figure with some degree of caution.</p>
<p><u>Road safety: numbers 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>Decrease</p>	<p>In the three-year rolling average from 2018 to 2021 there were 683 KSI.</p> <p>It is important to note that lower traffic volumes in 2020 and 2021 are likely to have contributed to the observed reduction in KSIs.</p>
<p><u>Road safety: number of slight injuries</u></p> <p>Number of slight injuries three year rolling</p>	<p>Decrease</p>	<p>The three-year rolling average from 2018 to 2021 was 2,519 slight injuries.</p>

<p>average (2016-17 to 2018-19) 3,275</p> <p>Data source: Traffic Accident Data Unit</p>		<p>It is important to note that lower traffic volumes in 2020 and 2021 are likely to have contributed to the observed reduction in KSIs.</p>
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## North East Joint Transport Committee

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**Date:** 13 September 2022  
**Subject:** North East Bus Enhanced Partnership  
**Report of:** Managing Director, Transport North East

### Executive Summary

Following the publication of our Bus Service Improvement Plan (BSIP) in October 2021, and its indicative funding award of £163.5 million in April 2022, our region continues on its journey towards the establishment of an Enhanced Partnership (EP).

As part of the statutory process of establishing an EP, drafts of the EP Plan (which capture the intent and ambition of the BSIP) and of the EP Scheme (which sets out the actions of the EP) must be presented to bus operators so that they have an opportunity to object if they do not agree with what is proposed. Following this objection period, a period of statutory consultation will commence. The EP Scheme is at an advanced stage of drafting but continues to be work in progress.

This report recommends that JTC notes and provides feedback on the attached advanced draft, and delegates authority to officers to make any further required changes to the EP Plan and Scheme so that both documents can be finalised in a timely manner so that consultation can proceed.

Following consultation a finalised version of both the EP Plan and Scheme will be presented to the JTC for final review and approval, planned for January 2023.

### Recommendations

The North East Joint Transport Committee is recommended to:

- i. note the draft EP Plan and Scheme as work in progress and provide any feedback, which when completed will be for presentation to bus operators for the Objection Period and for Statutory Consultation;
- ii. delegate authority to the Managing Director, Transport North East, following consultation with the chair of the JTC and the Monitoring Officer, to make such amendments to this draft of the EP Plan and Scheme as may be required for Statutory Consultation to begin.

## 1. Background Information

- 1.1 The National Bus Strategy published by the Department for Transport (DfT) on 15 March 2021 set out the opportunity to deliver better bus services for passengers, through reform of how services are planned and delivered. The Bus Service Improvement Plan (BSIP) is our region's response to this strategy.
- 1.2 The North East's BSIP has been indicatively awarded £163.5 million through the government's competitive funding pot to improve bus services. We are awaiting final settlement of this funding, assuming full award, we will begin to deliver schemes targeting our BSIP Key Performance Indicators (KPIs) to improve bus patronage, modal share, performance and customer satisfaction.
- 1.3 The National Bus Strategy aligns with our region's published Transport Plan aspirations. During the formation of the BSIP we also gathered in depth data on the region's priorities for bus through public and key stakeholder engagement, such as the Big Bus Conversation. An effective BSIP will help us to deliver these transport objectives and is a required step to forming an EP between the JTC and bus operators.
- 1.4 The Partnership will build on existing close collaboration between local authorities and bus operators. Once the EP goes live customers will begin to experience the following far reaching benefits on the bus network:
- New ticketing products which will enable cheaper, simpler, multi-operator and multi-operator fares, something we know is a top priority for users and will attract more passengers to the network.
  - Many new services and improved services, delivering new routes to connect communities and improving frequencies and operating hours for existing services.
  - Speed up buses and make them more reliable through Bus Priority Infrastructure and Intelligent Transport Systems Investments, allowing users to rely on buses and attracting more people to use their local services.
  - Introduce a major Park and Ride site in the region, to offer a sustainable transport option into urban centres, combating air pollution and congestion and stimulating growth in our centres.
  - Investment focused on connectivity in rural areas such as 'on demand' 'Demand Responsive Transport' and small, rural focused 'Pocket Park and Ride' sites.
  - Updating outdated bus stops and stations in the region to correct safety or accessibility issues that may be barriers to travel.
  - Ensuring services run as a cohesive network, including branding and enhanced passenger information. This will be in the form of a new website and app as well as additional staffing and offline information.
  - A Code of Conduct and Bus Passenger Charter will also be agreed, ensuring that bus users and bus operators work together ahead of any

network changes and passengers can come to expect consistent standards throughout the network.

### **The EP Plan and Scheme process**

- 1.5 The DfT is currently reviewing the draft formal documentation that we have developed and that outlines how the BSIP will be delivered and makes an EP. This comprises:
- an EP Plan: the high-level vision and objectives for bus services in the local area; and
  - one or more EP Scheme(s): which set out greater detail of how the visions and objectives of the BSIP will be achieved, including any commitments made by the local authorities or standards to be met by bus operators. We will only be producing one scheme which covers the whole EP area, the legislation allows to have multiple schemes which only apply to more specific geographical areas, i.e. one bus corridor.
- 1.6 Transport North East (TNE) has been working with the DfT to finalise the draft EP Plan and Scheme that were submitted at the end of June 2022. At the time of writing there are still some elements of the EP Scheme that are to be agreed with DfT to allow for funding to be confirmed and for the statutory process to start. The drafting of these points has yet to be reviewed fully by partners. Once all partners are satisfied with the proposed document the consultation process can begin. During the “operator objection” period, operators of qualifying services within the EP area can submit any objections they may have to the content of the Plan and Scheme. Following this “operator objection” period, if no objections are received or upheld, Statutory Consultation may then take place.
- 1.7 Provisional milestones, these are estimated and subject to change:
- 28 October 2022 – 27 November: Operator objection period
  - 5 December 2022 – 30 January 2023: Statutory consultation period
  - 21 February 2023: Meeting of the North East Joint Transport Committee to approve the Enhanced Partnership
  - 28 February 2023: Intended commencement of the Enhanced Partnership
- 1.8 In the event that an objection is received from an operator, which meets the criteria to be a valid objection, the JTC will need to discuss the contentious measures in the Plan and/or Scheme with the operators to resolve them by either amending them or removing them. Once the revisions have been made to the Plan and/or Scheme it will be necessary to rerun the objection period.
- 1.9 There are two criteria under which objections could cause the need for changes to the EP Scheme or Plan:

### Criterion one

The combined registered distance of all the qualifying local services operated by objectors is at least 25% of the total registered distance of all local bus services operated by all bus operators in the relevant EP area; and

- (i) where there are four or more operators in the relevant EP area, at least three are objectors; or
- (ii) where there are less than four operators in the relevant EP area, all are objectors.

### Criterion two

At least 50% of the total number of operators of qualifying local services within the relevant plan or scheme area have objected and the combined registered distance of the qualifying local services operated by the objectors in the relevant area is at least 4% of the registered distance of all local bus services operated by all bus operators in that area.

- 1.10 The EP Plan replicates the BSIP, confirming the shared aspiration of JTC, bus operators and partners to deliver the extensive improvements to our bus network outlined in that document.
- 1.11 The EP Scheme, in its current form, contains initiatives and actions to be delivered early in the currency of the EP, commitments to develop other interventions where details are still being finalised and includes commitments made by LA7 members, Nexus and bus operators. These commitments to develop will be updated in the EP scheme through the use of the variation mechanism, this is set out in Section 8.6 of the EP scheme and follows a process where both affected operators and local authorities agree the variation before it is formally agreed by the JTC.
- 1.12 Governance  
Currently meetings between JTC, bus operators and other partners involved in the delivery of bus services are informal in status.
- 1.13 The BSIP, and therefore the EP Plan and Scheme, set out an intention for a governance structure to be introduced to oversee the operation of the EP and the delivery of the commitments made by the partners in order to achieve the shared objectives. The making of an EP Scheme provides an opportunity to introduce this governance.
- 1.14 The EP Scheme refers to an Enhanced Partnership Board and Local Bus Boards, the full terms and membership of which have yet to be finalised. However, it is important to note that changes to the EP Plan and Scheme, along with the allocation and expenditure of BSIP funding, will be decisions which can only be made by JTC. Therefore the role of the Enhanced Partnership Board and Local Bus Boards will be advisory and they will make recommendations based on the shared objectives and operational needs of the Partnership, which TNE officers will report to the JTC, or in some cases relevant highways authorities, for decision

## **2. Proposals**

### **2.1 This report proposes that:**

The JTC notes the advanced draft of the draft EP Plan and Scheme (Annex A and B of this report) which is at an advanced stage of development for inclusion in an operator objection and statutory consultation process; and

Subject to relevant consultation, the Managing Director, TNE, is given delegated authority to make amendments to the advanced draft of EP Plan and/or Scheme following feedback from the DfT and partners ahead of consultation if this becomes necessary.

## **3. Reasons for the Proposals**

3.1 Without an EP Plan and Scheme, an EP cannot exist under the Bus Services Act 2017. Our BSIP funding is also conditional on an EP being put in place and the need to take the EP Plan and Scheme through an operator objection period and statutory consultation have been outlined earlier in this paper.

3.2 Not delivering an EP would substantially limit our ability to fund and deliver improvements to the bus service needed in the region. We know these investments are hugely important to all communities and a failure to deliver an EP, and therefore BSIP, will be a missed opportunity in terms of the economic, health, social and environmental benefits they will bring.

3.3 The proposal that the Managing Director, TNE, is given delegated authority to make amendments to the EP Plan or Scheme will enable requests by the Department for Transport, LA7 and Nexus representatives, other partners and operators to be reflected. This could become necessary prior to the operator objection period and following the operator objection period and ahead of consultation.

## **4. Alternative Options Available**

4.1 The proposals recommended in this report are considered to be the most efficient and effective way to take forward the North East's BSIP. All relevant stakeholders have been involved in the preparation of the draft EP Plan and Scheme and no clear and significant alternative proposals have been put forward for consideration by the JTC.

## **5. Next Steps and Timetable for Implementation**

5.1 Subject to approval, the EP Plan and Scheme will be distributed to operators on 23 September and will then go to statutory consultation on 31 October. Ongoing work will be undertaken in the development of the EP Scheme.

## **6. Potential Impact on Objectives**

6.1 A successful EP will help us to deliver the objectives of the North East Transport Plan. In particular, the EP will support a green recovery through the provision of an attractive form of sustainable transport.

## **7. Financial and Other Resources Implications**

7.1 Failure to deliver an EP Plan and Scheme(s) will prevent the North East from accessing any new government funding for buses (both capital and revenue support). Additional government funding streams could also be affected, such as the Bus Service Operators Grant (BSOG), which will only be available for services operated or measures taken under an EP. Failing to deliver an EP has the potential to affect future, wider funding allocations for transport in the North East from the government, as they will take into account LTAs' performance with respect to the policies set out in the National Bus Strategy.

7.2 In its first iteration, the Scheme is assumed to be without additional cost to JTC as costs will be met from our eventual BSIP funding award, as well as underspending against that grant funding provided in the current year to establish the BSIP and EP which will be carried over in an earmarked reserve at year end. It is assumed that development work, for example that being undertaken associated with a logo to represent the new network and for website development can be met with Bus Capability Grant funding provided by the DfT for the development of the EP; and with BSIP funding once this becomes available.

7.3 All actions within the EP Scheme will be funded through our BSIP award, or are costs already met by Nexus, Durham County Council and Northumberland County Council.

7.4 As our funding award is currently indicative, in the event that this funding will not be forthcoming, to the extent that costs cannot be met from available TNE budgets, local authorities would be requested to act as funder of last resort. If required, this would be subject to a separate future report to the JTC. It should be noted that section 6.3 of the EP Scheme states that the facilities and measures are subject to funding being available and allows for these facilities and measures to be removed from the Scheme using the variation mechanism set out in section 8.6 of the EP Scheme.

## **8. Legal Implications**

8.1 The EP follows a statutory framework requiring legal notices and formal agreements. The EP will become legally binding upon the LTAs, LAs and Bus Operators. Specialist legal advice has been sought in support of the development of the EP, particularly, in relation to subsidy control and competition law matters.

## **9. Key Risks**

9.1 Failure to comply with the requirements of the National Bus Strategy would likely prompt the withdrawal of our indicative BSIP funding award. This would represent a

wasted opportunity for the region and lead to uncertainty around the prospects for the bus network without investment into reform.

- 9.2 We will continue to work with central government to ensure that a change of priorities will not jeopardise the delivery of our EP scheme. Communication is ongoing to address any issues and ensure that the full funding allocation can be delivered.
- 9.3 It has been indicated previously that the provision of future central government funds for transport will be dependent on the ambition and delivery of our EP. This is likely to apply to all future funding bids such as investments in our region's roads. It has also been directly stipulated that bus operators in areas without an EP or franchising agreement will not be eligible for the Bus Service Operators Grant once it has been reformed. This grant allows operators to recover some of the cost of their fuel and the removal of this fund would threaten the viability of many of the region's secured and commercial services.
- 9.4 We have previously had to adapt to changing timescales by the DfT, for this stage of the process this could mean a deadline for making our EP is put in place, or feedback is not received to our expected timeframe. Our Bus Team has been equipped with additional resource to respond to this and ensure any changes to our EP Plan and Scheme can be made at short notice. We will make a further request to JTC if these requests from DfT are material to the EP.
- 9.5 If we are to receive any operator objections that require the objection period to be repeated, without delegated authority to repeat these steps this process would need to go back to the JTC. Given the tight time scales associated with this project, this would cause significant delays and likely prevent the EP from being delivered to timescale.
- 9.6 The interventions which are set out in the EP Scheme have been drafted to mitigate the risk of leaving authorities with long term commitments without central government financial support. There is also the option to remove interventions from the EP Scheme if funding is not available or it is found to be undeliverable.

## **10. Equality and Diversity**

- 10.1 While everyone will benefit from the increased availability of cheaper, reliable and more attractive bus services we know that this will have a larger impact on certain groups. From our stakeholder groups we have heard directly about the impact bus services have on users who are less likely to have access to private vehicles, such as those with certain disabilities, those with lower incomes and young people. In our own independent research older residents, those not in education, employment or training and black and minority ethnic residents were all more than twice as likely to be frequent bus users, when compared to the North East population as a whole. BSIP initiatives such as cheaper fares with more reliable and frequent services will give greater freedom to many people to access jobs, education healthcare and social support.

## **11. Crime and Disorder**

11.1 There are no specific crime and disorder implications arising from this report.

## **12. Consultation/Engagement**

12.1 The process for developing and implementing an EP necessitates statutory consultation with bus operators and a number of groups identified as key stakeholders. These stakeholders will be contacted directly and include neighbouring authorities, police forces, traffic commissioners and transport organisations, such as Bus Users UK and Transport Focus.

12.2 In the production of the BSIP, detailed consultation was undertaken with partners, stakeholders and the public, as reported to JTC on 21 September 2021. Close collaboration has also been ongoing with partners in the development of the EP Plan and Scheme. In addition, LA7 officers have been briefed on the content of this report and LA7 and Nexus lawyers have reviewed draft versions of the EP Plan and Scheme and offered comments on drafting.

## **13. Other Impact of the Proposals**

13.1 None

## **14. Appendices**

14.1 Draft Enhanced Partnership Plan – Appendix 1  
Draft Enhanced Partnership Scheme – Appendix 2

## **15. Background Papers**

15.1 North East Bus Service Improvement Plan: [TNE-BSIP\\_FINAL.pdf](#)  
([transportnortheast.gov.uk](http://transportnortheast.gov.uk))

Bus Back Better – The National Bus Strategy: [Bus Back Better](#)  
([publishing.service.gov.uk](http://publishing.service.gov.uk))

The Bus Services Act 2017 – Enhanced Partnerships Guidance: [The bus services act 2017: enhanced partnerships \(publishing.service.gov.uk\)](#)

JTC Report – Vision for Buses (item 9): [\(Public Pack\) Agenda Document for North East Joint Transport Committee, 13/07/2021 14:30 \(northeastca.gov.uk\)](#)

JTC Report – Bus Partnerships (items 9 and 10): [\(Public Pack\) Agenda Document for North East Joint Transport Committee, 15/06/2021 14:30 \(northeastca.gov.uk\)](#)

Bus Service Improvement Plan outline resourcing form (the content of this document is exempt from publication pursuant to paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972)

## **16. Contact Officers**

16.1 Philip Meikle, Transport Strategy Director

E-mail: philip.meikle@transportnortheast.gov.uk

**17. Sign off**

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

**18. Glossary**

BSIP – Bus Service Improvement Plan

EP – Enhanced Partnership

JTC – Joint Transport Committee

NBS – National Bus Strategy

LTA – Local Transport Authority

LA – Local Authority

DfT – Department for Transport

BSOG – Bus Service Operators Grant

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**TRANSPORT NORTH EAST**  
**ENHANCED PARTNERSHIP PLAN**

**THE NORTH EAST JOINT TRANSPORT COMMITTEE ENHANCED PARTNERSHIP PLAN FOR BUSES IS MADE IN ACCORDANCE WITH SECTION 138G(1) OF THE TRANSPORT ACT 2000 BY:**

**The Durham, Gateshead, South Tyneside and Sunderland Combined Authority** known as the North East Combined Authority ("**NECA**") (comprising of the local authority areas of Durham County Council, Gateshead Council, South Tyneside Council and Sunderland City Council).

**The Newcastle Upon Tyne, North Tyneside and Northumberland Combined Authority** known as the North of Tyne Combined Authority ("**NTCA**") (comprising of the local authority areas of Newcastle City Council, North Tyneside Council and Northumberland County Council).

**Tyne & Wear Passenger Transport Executive ("**Nexus**")** of Nexus House, 33 St James' Boulevard, Newcastle upon Tyne, NE1 4AX;

**The County Council of Durham** of County Hall, Aykley Heads, Durham, DH1 5UZ (**Durham**);

**The Borough Council of Gateshead**, Civic Centre, Regent Street, Gateshead, NE8 1HH (**Gateshead**);

**Newcastle City Council**, Newcastle Civic Centre, Barras Bridge, Haymarket, Newcastle upon Tyne, NE1 8QH (**Newcastle**);

**The Council of the Borough of North Tyneside**, The Quadrant, The Silverlink North, Cobalt Business Park, North Tyneside, NE27 0BY (**North Tyneside**);

**Northumberland County Council**, County Hall, Morpeth, NE61 2EF (**Northumberland**);

**The Council of the Borough of South Tyneside**, Town Hall & Civic Offices, Westoe Road, South Shields, NE33, 2RL (**South Tyneside**); and

**The Council of the City of Sunderland**, City Hall, Plater Way, Sunderland, SR1 3AA (**Sunderland**).

**1. INTRODUCTION**

- 1.1. Over 154 million journeys a year were made by bus in the North East before the Covid pandemic. Buses provided essential services during the pandemic, and bus ridership is making a rapid recovery as restrictions are lifted. The North East Joint Transport Committee (the "**NEJTC**") want the bus network to play an even greater role in bringing healthy and fair economic growth across the region and play an important role in tackling the climate emergency in the region
- 1.2. Buses are essential to delivering the vision set out in the North East Transport Plan 2021-2035 (the "**Transport Plan**"): a green, healthy, dynamic and thriving North East. Increasing the share of travel by bus will support the Strategic Economic Plan for a growing and decarbonised economy. Buses are uniquely well placed to give access to work and training opportunities for everyone, and they can help with the health of our region too through lower carbon emissions and they are easy to integrate with walking, cycling or other active travel for part of the journey as well as being part of a wider public transport network incorporating the Tyne and Wear Metro and the Shields Ferry.
- 1.3. The below table gives an overview of the key objectives of the Bus Service Improvement Plan (the "**BSIP**") and how, subject to adequate funding, it will work together with the EP Plan and EP Scheme to deliver better bus services for local people and wider local transport plan objectives.

<i><b>BSIP Objectives</b></i>	<i><b>EP Approach</b></i>
1. Repair the damage caused by Covid-19 to bus ridership numbers	<ul style="list-style-type: none"> <li>• Maintain and promote good standards of hygiene and cleanliness across bus fleets and public transport infrastructure.</li> <li>• Ensure that sufficient funding is available to maintain the current network and secure ‘socially necessary’ services once the Bus Recovery Grant ceases.</li> </ul>
2. Grow bus patronage	<ul style="list-style-type: none"> <li>• Improve facilities and information provision onboard buses, in stations and at stops, and online.</li> <li>• Develop and introduce a new, regionwide logo for public transport complementary to existing operator brands.</li> <li>• Introduce more attractive and relevant ticketing options.</li> <li>• Expand and improve routes and services within the network, including new demand responsive services, as well as better connections beyond our boundaries.</li> </ul>
3. Grow bus modal share	<ul style="list-style-type: none"> <li>• Expand and improve routes and services within the network as well as better connections beyond our boundaries.</li> <li>• Introduce more attractive and relevant ticketing options.</li> <li>• Commit to and consult on infrastructure improvements which prioritise and promote the bus network as part of a multi-modal public transport network.</li> <li>• Develop and implement marketing campaigns to provide the bus network with increased public exposure.</li> </ul>
4. Increase customer satisfaction amongst users of the bus network	<ul style="list-style-type: none"> <li>• Improve facilities and information provision onboard buses, in stations, at stops and online.</li> <li>• Introduce more attractive and relevant ticketing options.</li> <li>• Expand and improve routes and services within the network as well as better connections beyond our boundaries.</li> <li>• Ensure staff have adequate training to assist with journey planning and maintain high standard, as well as creating new roles in order to facilitate the rollout of improvements.</li> <li>• Develop and implement a Bus Passenger Charter and network change processes with a view to establishing community engagement, accountability, and review at the heart of all improvements.</li> </ul>
5. Make buses faster, more punctual and more reliable	<ul style="list-style-type: none"> <li>• Expand and improve routes and services within the network as well as better connections beyond our boundaries.</li> <li>• Commit to and consult on infrastructure improvements which prioritise and promote the bus network.</li> <li>• Commit to targeted infrastructure interventions on particularly salient corridors/pinch points.</li> </ul>
6. Make buses greener	<ul style="list-style-type: none"> <li>• Develop and implement changes to vehicles and supporting infrastructure pursuant to the regions green vision.</li> </ul>

1.4. This document fulfils the statutory requirements set out by the Bus Services Act 2017 of an Enhanced Partnership (EP) Plan. Initially, this will facilitate the introduction of a single EP Scheme covering the whole area covered by this EP Plan. Over the Plan period, other potential EP Schemes may be proposed by the JTC, Transport North East (“TNE”) on behalf of the NEJTC, constituent authorities, Nexus or bus operators. The EP Scheme will place binding commitments on partner organisations to provide enhancements and ensure on-going provision of high-quality bus services.

1.5. The EP Plan initially covers a three (3) year period from **[date to be inserted]** The EP Plan will be reviewed by **[date to be inserted]** and at least annually thereafter.

1.6. Any variation to this EP Plan shall be made in accordance with section 138L Transport Act 2000.

- 1.7. If it is determined to revoke this EP Plan this shall be done in accordance with section 138O Transport Act 2000.
- 1.8. In accordance with statutory requirements for an EP Plan, this document includes:
  - 1.8.1. Details of the area covered
  - 1.8.2. Factors affecting the local bus market
  - 1.8.3. A summary of passengers' experiences of using bus services and the priorities of users and non-users for improvements
  - 1.8.4. Trends in bus journey speeds and the impact of congestion on bus services
  - 1.8.5. Objectives that are sought for bus service provision
  - 1.8.6. Interventions needed to achieve the desired outcomes

**2. COMPETITION TEST**

The making of the Enhanced Partnership has been subject to the Competition Test set out in Part 1 of Schedule 10 of the Transport Act 2000. The assessment, undertaken by NECA and NTCA, concludes that the scheme does not have and is not likely to have a significantly adverse effect on competition and any effects on competition are proportionate to the achievement of those purposes.

**3. AREA COVERED BY THE ENHANCED PARTNERSHIP PLAN**

- 3.1. North East England is a diverse region encompassing large and densely-populated conurbations, a surrounding geography of commuter towns and semi-urban villages and a much larger hinterland of former mining villages and beyond them sparsely populated rural and coastal communities.
- 3.2. As such, this EP Plan covers seven local authority areas in the North East, consisting of two combined authorities:
  - 3.2.1. The NECA (comprising of the local authority areas of Durham County Council, Gateshead Council, South Tyneside Council and Sunderland City Council).
  - 3.2.2. The NTCA (comprising of the local authority areas of Newcastle City Council, North Tyneside Council and Northumberland County Council).
- 3.3. These Combined Authorities are Local Transport Authorities in their own right. They discharge their transport functions jointly through the NEJTC, which is a statutory body responsible for transport policy and delivery across the region.
- 3.4. TNE is the name of the officer group that supports the NEJTC in developing and delivering transport and strategy across the region.
- 3.5. "Nexus" is the trading name of the Tyne and Wear Passenger Transport Executive, responsible for delivering passenger transport in Tyne and Wear, including owning and operating the Tyne and Wear



Figure 1.1

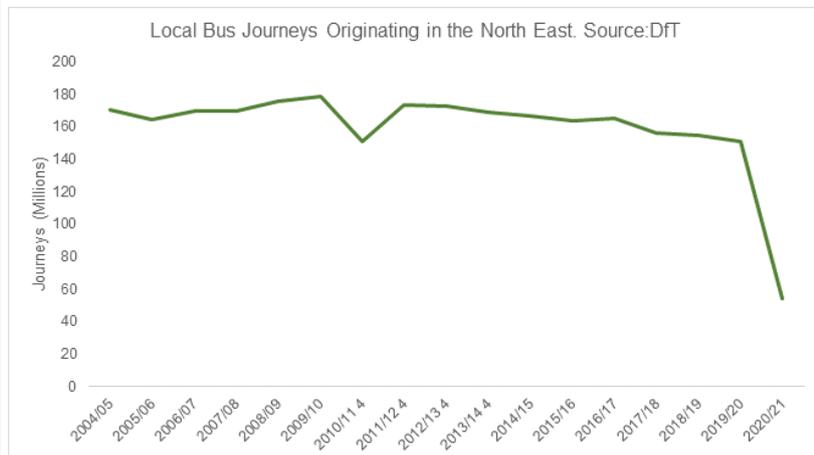
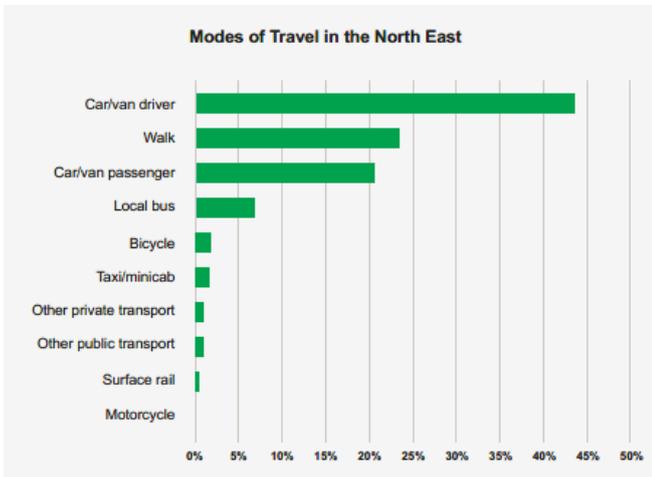
Metro and the Shields Ferry. Tyne and Wear is a largely urban sub-section of the region covering the local authority areas of Gateshead, Newcastle, North Tyneside, South Tyneside and Sunderland.

**4. A SUMMARY OF ANY AVAILABLE INFORMATION ON PASSENGERS' EXPERIENCES OF USING BUS SERVICES IN THE AREA AND THE PRIORITIES OF USERS FOR IMPROVING THEM**

- 4.1. TNE talked to the people and businesses in the North East through an informal engagement campaign called ‘the Big Bus Conversation’, to understand what people think needed to be done to encourage bus use.
- 4.2. TNE established a Stakeholder Forum for businesses, services such as health and education, advocates for equalities groups and passenger and community representatives. Stakeholders contributed by email and through attendance at four multi-media events, which were well attended, both online and in person. The most rural parish councillors welcomed the ability to participate virtually, since ‘more buses to more places’ is their primary need. The DfT presented to the Stakeholders and took part in discussion, as did "NEbus", the name of the local bus operators’ association encompassing the providers of services across the North East. The events gave insights into the planning and delivery of Demand Responsive Transport (DRT), customer service for people with extra needs and ways to support businesses and services to increase the use of bus by their staff and customers.
- 4.3. Before the pandemic, local buses accounted for 6.4% of journeys made in the North East (a measurement called “modal share”), in comparison to 64.1% by car and van. However, 49% of people told TNE that they would be open to using buses more often. This shows a strong potential for significant growth in bus use.
- 4.4. However, just over a quarter of people told TNE that they’re “not the kind of people who get the bus”, highlighting a problem with the perception of bus services. This does not match people’s experience on the ground; bus user satisfaction in our area is 91% according to Transport Focus.
- 4.5. When TNE asked about the barriers to using the bus more often, people said that bus fares are too high, they don’t trust buses to turn up on time, buses are slow and they don’t always go where people need them to. Cleanliness and maintenance are also important to people in light of the Covid-19 pandemic.

**4.6. Bus Modal Share**

4.7. The below graph shows the percentage of trips by head in the North East according to DfT data (note that this currently includes journeys in the Tees Valley). Car and van use, either as a driver or passenger, accounts for 64.1% of journeys made in the North East, in comparison to local buses which account for 6.4%. With 49% of people in our market research indicating that they would be open to using buses more often, there is a strong potential for significant growth in bus modal share from the current position.

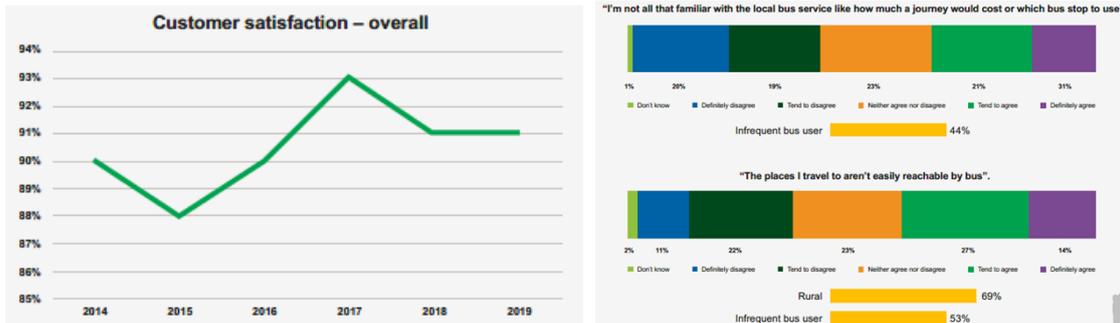


**4.8. Patronage**

- 4.9. Bus patronage has been declining for many decades although in recent years the picture has been more varied. There are a number of reasons for this, and qualitative market research data shows that a quarter of those aged 75+ feel that ‘bus times don’t fit their needs’. This is especially important as people in this age bracket are most at risk of social isolation, with many seeing the bus as a lifeline to human connection.
- 4.10. Market research showed that 75% of our Black, Asian and Minority Ethnic (BAME) communities who are car users say they would consider switching to the bus for some journeys. There is therefore a real opportunity to grow patronage in our BAME communities if barriers are removed.
- 4.11. The picture builds as TNE explored the data relating to those living in rural areas. 28% of people living in rural parts of the North East said that ‘the places [they] travel to aren’t easily reached by bus’ according to market research.

**4.12. Customer Satisfaction**

- 4.13. The below graph, based on data from Transport Focus, shows that 91% of people using bus in the North East were satisfied with their journey. While this is higher than the national figure of 89%, there is still room for improvement. 69% of respondents to market research rated local bus services as excellent or good. However, for people in rural locations only 22% were positive about local bus services, compared to 30% who shared negative responses.



- 4.14. Many people who use buses in our region do not have another means of transport available to them. In Tyne and Wear alone 89% of bus users have no car available to make the journey and therefore they need the bus to be on time, clean and have the necessary facilities they need for comfort and convenience. Improving customer satisfaction will be key to maintaining existing customers and keeping the patronage of those who make the change from car to bus.
- 4.15. Currently, 54% of the region’s bus fleet is not at the engine emission standard of Euro 6 or higher.
- 4.16. When TNE consulted the public as part of the Big Bus Conversation many people were also mindful of unnecessary carbon emissions coming from bus engines.
- 4.17. Additionally, the independent market research report provides further insight into barriers to bus use. One of the barriers identified was a lack of knowledge about service provision and fares: 34% of people who responded agreed with this, rising to 52% of those who class themselves as infrequent users.

**5. A SUMMARY OF ANY AVAILABLE DATA ON TRENDS IN BUS JOURNEY SPEEDS AND THE IMPACT OF CONGESTION ON LOCAL BUS SERVICES**

- 5.1. Services are inevitably tailored to geography, demographics and markets, with frequent services in the metropolitan and urban areas and more targeted services connecting many other key locations. “Secured services”, which are bus services that are tendered and contracted by the local authorities and Nexus, respond to social need where commercially operated services are not viable, often in rural or remote areas, places that are hard to serve as part of an existing bus route, or at the extremities of the day.

**5.2. Reliability**

5.3. Reliability was a concern for many during independent research for the Big Bus Conversation. The sentiments expressed below demonstrate just how crucial it is that buses turn up. Buses connect people to work, education, healthcare and social events – all of which are essential when it comes to living a healthy and well-balanced lifestyle, which is something we want for the people of the North East. When buses fail to arrive, it has a knock-on effect on each of these things, which undoubtedly puts people off using the bus service again.

5.3.1. “We need real-time digital information on street bus stops as not everyone has internet, and there are problems in winter with reliability.” (Big Bus Conversation)

**5.4. Punctuality At The Start Of A Journey**

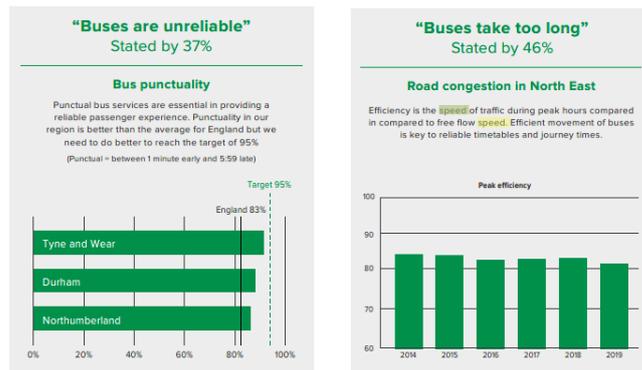
5.5. The buses in the EP Plan area have better punctuality than average for England, however they fall short of the 95% punctuality target (a bus running no more than 5 minutes late or 1 minute early on at least 95% of occasions).

5.6. Punctuality is intrinsic to efficient bus travel and the continued use by the public of the bus network.

5.7. A lot of people, especially those from low-income households without cars, rely on the bus to make connecting journeys on different modes of public transport in order to get from A to B. When the start time of a bus journey is delayed, this has the consequence of halting someone’s planned multi-modal journey, and again will most likely result in a lack of trust and confidence in the bus network. It may bring with it social and economic repercussions for the traveller, for instance if this makes them late for work or a social engagement.

**5.8. Punctuality At Timing Points**

5.9. Punctuality in the region has suffered from the rise in traffic post pandemic. In autumn 2021, a blended figure of operator data showed almost 20% of buses arriving at stops more than 5 minutes late or 1 minute early. During lockdown, performance on the least punctual routes increased to 96%, showing what can be achieved if buses have a clear run. Travelling by bus usually takes longer than travelling by car and one of the reasons for this is because of the amount of times buses are required to stop along routes. There is scope to introduce measures which reduce congestion, increase bus priority or provide more direct services, especially at peak times, to further reduce journey times and address passenger feedback such as the responses to a 2019 Nexus Insight Panel survey shown in the graphs below:



**5.10. Average Bus Speeds**

5.11. The speed of a bus journey can be an off-putting factor when making a travel choice. Bus services need to be as quick and efficient in terms of journey time as possible, to respond to feedback from the Big Bus Conversation that included:

5.11.1. “Conductors on buses needed to speed up journeys”;

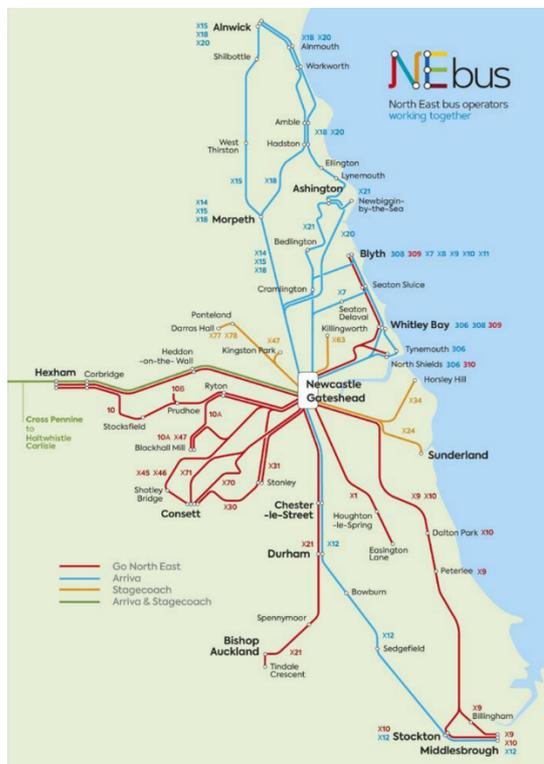
5.11.2. “An Oyster card system would speed up bus boarding”;

- 5.11.3. “More BUS ONLY lanes and traffic light priority for buses, and an end to speed humps or chicanes on bus routes”, and
  - 5.11.4. the need for “shorter journey times with better links between Durham, Washington, Sunderland and Newcastle”.
- 5.12. Others think there is work to be done to introduce more express shuttle services to key locations from small villages that have minimal stoppage along the route (Big Bus Conversation), and this is backed up by the market research carried out.

**6. AN ANALYSIS OF CURRENT LOCAL BUS SERVICES**

**6A THE CURRENT BUS MARKET IN THE NORTH EAST**

In the North East we currently have 3 large bus companies who operate the majority of services in the region: Stagecoach North East, a trading name of Busways Travel (“**Stagecoach**”), Arriva North East, a trading name of Arriva Northumbria Limited (“**Arriva**”) and Go North East Limited (“**Go North East**”). The ‘big three’ operate over 1907 buses throughout the region, below shows an approximation of the main bus routes operated by the three large operators in the region:



- Arriva tends to cover rural areas in County Durham and Northumberland, often covering longer distances and stretching into remote areas such as north Northumberland.
- Stagecoach’s services are often more urban with many shorter distance, high frequency services in Newcastle. They also operate ‘town’ services in Sunderland and expresses services between Newcastle and South Shields and Newcastle and Sunderland.
- Go North East operate within Tyne and Wear, Durham and Northumberland. Unlike Stagecoach or Arriva they operate many services in Gateshead and also have many longer distance services serving Sunderland, Washington and Consett.

It is currently estimated that 10% of the current network are services secured by local authorities, operated by a mixture of the large operators and small operators. Smaller operators make up a vital section of the bus market in the North East with many providing a number of services with companies such as Stanley Travel employing 83 people with 70 vehicles.

Smaller operators tend to offer a mix of some commercial services, secured services as well as private hire services such as coach hire, taxi services and novelty vehicle hire. There is some regional variation in the make up of the commercial and secured network with all commercial services in Northumberland operated by Arriva and Go North East, where as there are many commercial services operated by small operators in Durham.

## 6.1. CUSTOMER EXPERIENCE

### 6.1.1. Real Time Passenger Information (RTPI)

- 6.1.1.1. RTPI systems at stops and stations are limited throughout the North East and where they do exist, they can be unreliable and function poorly. The information that is available is not always real-time, as the systems work from scheduled data where they cannot match a vehicle to a trip. This means in many cases, the information provided to customers is incorrect.

### 6.1.2. Information Off-Bus

- 6.1.2.1. In the North East, each of the large operators, some smaller operators, Nexus and the Local Authorities have their own websites and digital platforms which present pre-journey information relevant to their organisation in differing styles and to varying degrees of timelines. Interactive network maps are available through some Local Authorities and Nexus which have the scope to be expanded to be regionwide. In addition, third-party apps can be used to display transport options between any two locations, usually with live timing.
- 6.1.2.2. Printed timetables are currently provided at all stops in Tyne and Wear and selected stops in Durham and Northumberland. Leaflets are available in a limited number of places.
- 6.1.2.3. The Urban Traffic Management Control ("UTMC") centres currently monitor traffic flow without specific attention to bus, meaning that messaging about disruption on the road network is at a general level to inform motorists and not, necessarily, made relevant to bus users. The Transforming Cities Fund (TCF) is carrying out an intervention to provide smart signals on key corridors throughout the region, an additional element of work is looking at how these smart signals can communicate with RTPI information from buses to allow for signal priority to any late running service. This intervention is still underway at the time of writing.
- 6.1.2.4. Some bus operators also use their social media channels to notify customers of delays and changes in real-time

### 6.1.3. Network Branding

- 6.1.3.1. The North East has multi-operator individual branding, along with that of Nexus, Traveline and Network One. Network One is the trading name of Network Ticketing Ltd, a limited company which provides a range of multi-modal and multi-operator tickets in respect of travel on bus, Metro, the Sunderland to Blaydon rail line and the Shields Ferry in the North East. The existing branding is strong on an operator basis and there is extensive route-specific branding along key corridors. Modal branding in Tyne and Wear is very strong, with consistent information across geographical locations in Tyne and Wear. However, from a customer perspective, the complex range of brands, different fare offers and complex timetables have significant limitations and are not tied together through a unified transport logo.

### 6.1.4. Information At Bus Stops

- 6.1.4.1. The quality of information provision at bus stops varies widely throughout the region. All stops in Tyne and Wear have impartial, customised printed timetables whereas this is not the case in Durham or Northumberland.

6.1.4.2. A limited few have real-time information and some stops across the region lack any kind of passenger information. Shelter provision is discussed in detail in the Highways and Infrastructure section (see subsection 10.6.7). Real-time information displays are currently installed at close to 420 stops out of approximately 13,100 across the region (just over 3%), and where it is present, it can be unreliable and functions poorly. In addition QR codes are provided at all bus stops in Tyne and Wear allowing access to real time information by customers with a smartphone or similar device.

#### **6.1.5. Customer Safety**

6.1.5.1. All major North East bus operators, including nearly all independent operators' fleets, are fitted with CCTV cameras inside and out, to provide a safe and secure environment. Some operators' CCTV is supported by audio recording. Operators continue to invest as technology evolves. The majority have invested in additional safety measures including a vehicle location system, using mobile technology which quickly pinpoints the location of any bus or incident in real-time, improving response times and passenger support.

6.1.5.2. As part of the statutory requirement to provide the bus open data digital service internet site with automatic vehicle location data, all buses must be fitted with this Automatic Vehicle Locator (AVL) as of 7 January 2021, so all buses' live locations will be available. Except at bus interchanges, there is no dedicated CCTV at bus stops. Lighting is also inconsistent, with rural areas in particular often having very little lighting at bus stops.

6.1.5.3. Northumbria Police and Crime Commissioner, working in partnership with Nexus, successfully bid for Safer Streets funding from the Government, which will be used to improve transport and park safety in Northumberland and Tyne and Wear with an £800,000 investment in CCTV, Metro safety volunteers, increased lighting and a new reporting app.

#### **6.1.6. Information On The Bus**

6.1.6.1. Approximately 40% of the fleet of the main operators is currently fitted with next-stop audio-visual (AV) technology.

6.1.6.2. Large operators are committed to purchasing audio-visual equipment as part of the standard specification for new buses, but small operators are led by contractual agreements in which an enhanced specification for equipment is not standard.

#### **6.1.7. Customer-Facing Colleagues**

6.1.7.1. Customer feedback varies between groups with elderly and disabled passengers complimenting customer-facing colleagues on very high standards of empathy and care, whereas teenagers are less complimentary. Certificate of Professional Competence (CPC) driver training is carried out by operators; however, this is designed to maintain professional skills and meet the needs of the individual organisation, and customer service elements are not co-ordinated in terms of content across the board.

#### **6.1.8. Ride Experience**

6.1.8.1. All buses are wheelchair accessible, which makes boarding, alighting and moving through the bus easier. Other improvements targeted at people with extra needs also make the journey better for everyone else such as 'Stop' buttons which can be palm-operated, within the reach of every seat; voice and screen information about the next stop. Although buses carry commercial advertising NEbus operators recognise that there is a greater commercial return from building customer confidence. On buses in the North East, the advertising vinyls show the bus journey map, how to contact customer service, how to access the Wi-Fi, and other messages that make the customer feel they are in a cared for and high-quality environment.

6.1.8.2. Many buses on flagship routes come with Wi-Fi and charging points as standard. Around 40% of buses on the network have Audio/Visual technology installed.

### **6.1.9. Information At Stations And Interchanges**

- 6.1.9.1. Digital real-time bus information displays already exist in some key rail and Metro interchanges in the region but need upgrading and updating in line with the introduction of a new information system.
- 6.1.9.2. Signage directing customers who are interchanging between bus towards their next bus stop location is also limited.

### **6.1.10. Customer Charter (Beyond The Bus)**

- 6.1.10.1. Each of the region's main operators have their own customer charters. They broadly align on common themes including safety; information provision; fares and reliability of services. They also outline the complaints procedure and the rights of customers. Smaller operators typically don't have customer charters.

## **6.2. FARES AND TICKETING**

### **6.2.1. All Day Multi-Modal Ticket**

- 6.2.1.1. The region has some of the base characteristics of a fully integrated multi-modal public transport network, such as smart card ticketing and multi-modal tickets, yet people find the offer difficult to understand, especially non-users.
- 6.2.1.2. The closest product to a regionwide multi-modal capped ticket currently is offered through Network One as an Explorer ticket at a current price point of £10.90 for an adult, £5.70 for a child (under 15) and £20.60 for a family of up to two adults and three children for one day. The ticket does offer some extensions beyond the region into North Yorkshire. It is scarcely marketed beyond the Network One website.
- 6.2.1.3. Other multi-modal tickets are offered by Network One as one week, four week and annual tickets. The price is based on a Network One zonal model which consists of 5 zones and the NTL 'plus' area which covers Northumberland and County Durham. Network One Zones are inconsistent with those which have been established by bus operators for their own bus tickets and Nexus for Metro product ticketing.

### **6.2.2. Tickets Options For Under-19s And Region Wide Under-19 Multi-Modal Fare Cap**

- 6.2.2.1. Transport costs represent a heavy cut of the disposable income of some groups. This disproportionately affects young people, who may choose a college based on how much it costs to travel to rather than the college they actually want to go to. For young people in apprenticeships, their career prospects may be strong, but their starting salaries are lower. Even those in professional careers are on relatively low incomes when they start their career. Young people seeking less skilled work have a lower pay range.
- 6.2.2.2. This issue is particularly prevalent in the North East given the lower-than-average wages and employment levels.
- 6.2.2.3. Additionally, pockets of health and income inequalities are seen across the North East, with deprivation largely concentrated in urban areas. There are large disparities in levels of youth unemployment throughout our region.
- 6.2.2.4. Some places like Blyth in Northumberland and deprived electoral wards like Byker have youth unemployment levels of 15% and 16% respectively. By contrast, affluent areas such as Gosforth and Corbridge both have levels of 1%. This demonstrates that levels of opportunity for young people in the North East are highly uneven depending on geography. Single fares are available for Under-19s at a price point of £1.20 in some locations in the region; however, on longer distance services, for example those reaching into

Northumberland, fares at this price cannot currently be achieved without subsidy to the operators.

- 6.2.2.5. Network One currently offers a ticket aimed at the Under-19 and student market but this product is only available in one and four week iterations. There are various other tickets by different operators that are designed for young people and students but there are few similarities between these.

### 6.2.3. Family and Children Tickets

- 6.2.3.1. Only one of the region's main bus operators offers a family ticket. There are no other family specific offers available to bus passengers, however the Tyne and Wear Metro recently ran a successful trial offer where you can 'Take the Kids for Free'. This offer is now a permanent ticket option on Metro.

### 6.2.4. ENCTS

- 6.2.4.1. Under the English National Concessionary Travel Scheme ("ENCTS"), which is a national scheme, bus operators are required to carry pass holders during the core times of 09:30-23:00 Monday to Friday and at all times on weekends and Bank Holidays.

- 6.2.4.2. Three slightly different versions of the scheme, as allowed by the Transport Act 1985 and the Travel Concession Schemes Regulations 1986 apply, as there are three separate Travel Concession Authorities ("TCAs") in the North East:

6.2.4.2.1. Nexus;

6.2.4.2.2. Durham County Council; and

6.2.4.2.3. Northumberland County Council.

- 6.2.4.3. Although all schemes allow travel until the end of service, rather than 23:00, each has varying discretionary arrangements covering, for example, the treatment of the travel allowed with the pass pre-09:30.

- 6.2.4.4. Bus operators are reimbursed by each TCA using the general principle that operators should be 'no better or no worse off' as a result of carrying concessionary passengers and are therefore reimbursed for 'revenue foregone', as well as payment for the additional costs incurred by an operator due to passengers only travelling because the concession exists. The basis for the calculation of revenue reimbursement is the DfT calculator, although there are annual discussions between each TCA and each operator to agree the payments.

### 6.2.5. Care Experienced Concession

- 6.2.5.1. Care experienced young people often find it more difficult than other young people to access and stay in education, training and work. Lacking the family support that other young people have, travel makes up a large proportion of their disposable income.

## 6.3. THE NETWORK

### 6.3.1. Building on the strengths of our existing services

- 6.3.1.1. The goal is to build on the strengths of the existing network, so that the strong base of bus patronage in the North East is maintained and can then grow, ultimately safeguarding and increasing patronage levels.

- 6.3.1.2. The Covid-19 pandemic resulted in a significant reduction in bus passenger numbers. Patronage is still currently between 20% and 30% lower than the same period in 2019, although we are beginning to see slow growth. Stakeholders told us that the strong "avoid public transport" messaging of the early phases of the pandemic caused many people to

choose other options instead of the bus, increasingly relying on private cars. Stakeholders felt that to an extent, people are using that as an excuse to drive in spite of knowing now that bus travel is safe.

### **6.3.2. Consolidation To Reduce Duplication and Over-Provision**

6.3.2.1. There are particular locations across the network where there may be overprovision of bus services and therefore, there is scope on the network for consolidation opportunities under Enhanced Partnership Schemes and/or use of Qualifying Agreements (an agreement between operators which has as its object or effect the prevention, restriction or distortion of competition in the relevant area, which is certified by the local transport authority as passing the competition test under Part 2 of Schedule 10 of the Transport Act 2000 or which is exempt under section 9(1) of the Competition Act 1998). TNE has reviewed the current network in detail in order to identify what they might be.

### **6.3.3. Bus Network Improvements**

6.3.3.1. The vision to improve the bus network starts from a relatively strong position. More trips per capita are made by bus in the region than in most other English regions because there is a good network supported by well-developed bus priority measures.

6.3.3.2. Many corridors have high-frequency services, and there is an excellent and well-used network of interurban express routes running into the region's cities, which are assisted by traffic priorities to maintain high performance. In September 2020, a national survey by Transport Focus found that the biggest priority for bus passengers is more frequent services. This was fairly consistent across age groups and journey purpose and corresponds with research undertaken by TNE, especially in the Tyne and Wear area. This needs to be taken into account, as it indicates there may be potential to grow already frequent services.

6.3.3.3. However, the polycentric nature of the region means there are several towns that serve as local, sub-regional and regional centres, and many have poor links between them. Feedback from the Big Bus Conversation and stakeholder engagement confirmed that people want more and better connections between local places, not only the radial routes to the cities.

6.3.3.4. There are also many places that have few or no bus services at all. These are mainly rural areas that have very few local facilities, so people need to travel to take part in society. Low population densities have traditionally made rural areas difficult to serve viably by buses (even on a secured basis), but experience in the region and elsewhere suggests that innovative measures like Demand Responsive Transport and brokerage can be successful in filling gaps in the network.

6.3.3.5. The region already has 24-hour services on three routes from Newcastle to Chester-le-Street, Durham, Washington and Sunderland, and from Sunderland to Ryhope and Seaham. They have been very successful, improving access to jobs and supporting the night-time economy by giving people a safe way of getting home after work or going out with friends.

### **6.3.4. Demand Responsive Transport**

6.3.4.1. Currently County Durham is the only part of the region that has a comprehensive scheme of DRT that aims to complement the conventional bus service network. The Link2 service is open to everyone and aims to cater for people who do not have a suitable bus service or are unable to access regular bus services due to mobility issues. It can be used for any local journey, connecting with the bus network to travel further afield. Tyne and Wear has a taxi card system to help people with mobility difficulties travel independently. It allows them to travel with approved taxi companies at a discounted price. Members get issued with a card that is credited with a set amount of money every year - they use the money on their card to help pay towards each journey they make.

6.3.4.2. Both of these services are focused as a service for specific users for whom they are a lifeline; but they do not seek to grow modal share or bus patronage for the general population.

6.3.4.3. The region has some of the most rural communities in England with 21% of the population living in rural towns and villages. Analysis for Northumberland alone, shows that 37,000 residents of West Northumberland do not benefit from a bus service that allows for access to: key employment centres; significant further education sites; major shopping locations or evening recreation. Likewise, in County Durham, significant numbers of people live away from bus routes. In communities such as these, the car is the obvious transport mode, and there is no attractive sustainable alternative. Tyne and Wear also has rural communities in which the walking route to the main bus route may be too long for some, or the terrain may be challenging, again forcing groups of residents to the car.

6.3.4.4. Markets such as these are historically unattractive to bus operators because areas of low population density inevitably yield low passenger loadings and revenue over a higher operating distance and therefore cost. The value for money consideration of local authorities providing services is also likely to be low.

### **6.3.5. A New Technologically Enabled Offer For Home To School Transport**

6.3.5.1. In our region, 17.3% of the population are of school age, attending a total of 912 schools. School start times coincide with the busiest period on our road network each day with an estimated 132m car journeys for education being made in the North East each year. Data from Nexus shows that many parents drive children to school and that children return by public transport.

6.3.5.2. The data is backed up by verbatim feedback gathered in the Big Bus Conversation campaign and at stakeholder events, where parents reported that their need to drive to work is driven by their need to drop children at school.

6.3.5.3. The Big Bus Conversation suggests a series of barriers to bus use for home-to-school journeys, with common themes such as difficulty accessing information and the perception of safety, security and reliability of bus services being potential reasons why many don't consider the bus a viable option.

### **6.3.6. Cleaner And Greener Vehicles**

6.3.6.1. The North East bus fleet is made up of 1,352 vehicles of varying ages and emissions standards. The average age of the fleet is approximately 8.9 years, which is higher than the UK average of 8 years.

6.3.6.2. Big Bus Conversation data showed 23% of passengers surveyed were concerned about the condition and cleanliness of the bus used for their journey.

6.3.6.3. The emissions standards of the vehicles that operate in the area vary from Euro 3 to full electric (zero-emission). Over 40% of the fleet meets the Euro 6 standard, while 38% are Euro 5 and 17% are Euro 4 or lower.

6.3.6.4. There has been some investment in new, modern low emission vehicles across multiple providers over the last decade. For example, in 2013, Stagecoach deployed a fleet of bio-methane powered buses in Sunderland with a devoted gas refuelling facility at its depot in the City. More recently, in 2020, Go North East invested £3.7 million in new fully electric zero emission buses, which were partly funded by the Ultra-Low Emission Bus Scheme (ULEBS). Branded Voltra, the buses are powered by electricity that is sourced from zero-emission supplies such as solar, wind and hydro. They operate services 53 and 54 between Newcastle, Gateshead, Bensham and Saltwell Park.

6.3.6.5. However, Covid-19 has reduced investment below normal fleet replacement levels, as operators are concerned about the post-pandemic market, which means the average age of the fleet is increasing and there has been little progress to reduce emissions standards. The only confirmed vehicle orders are a further batch of nine zero emission electric buses for Go North East, which are due to be introduced in mid-2022.

## 6.4. HIGHWAYS AND INFRASTRUCTURE

### 6.4.1. Highways Network

- 6.4.1.1. There are busy arterial routes into cities and major towns which do not have infrastructure installed to a standard which meets their potential.
- 6.4.1.2. The Coast Road and The West of Newcastle Corridor are examples of this. Both play a key role in connecting people in the region to school, work and leisure, but are too often sites of congestion and pollution. The current bus routes, while frequent, do not offer a high-quality, uninterrupted experience to meet customer expectations.
- 6.4.1.3. The Coast Road (A1058) runs from Newcastle City Centre through densely populated North Tyneside to the Coast. Although the Metro does provide an alternative to private cars for many in North Tyneside, along the Coast Road itself many residents and key sites are not within a walkable distance of the nearest Metro stop. Traffic generated by Silverlink Retail Park, Cobalt Business Park, North Wallsend and other parts of North Tyneside and East Newcastle all come together on this key artery often resulting in significant traffic congestion.
- 6.4.1.4. The even more densely populated and heavily residential area of the West end of Newcastle is currently underserved by the higher speed public transport available elsewhere in the region (the Metro). Westgate Road is the direct route into the City from the A69, the main strategic road from the West of Northumberland and Cumbria into Newcastle which carries 38,000 vehicles a day. The A167 serves as the main artery into the centre of Newcastle from the A1 and the A696, the trunk route coming from Newcastle International Airport, carrying 27,000 vehicles a day. Together, this means that they are some of the busiest routes into the City.
- 6.4.1.5. These are just two examples of corridors in the region, where priority infrastructure could be improved.

### 6.4.2. Facilities For Walking To And Waiting For Buses

- 6.4.2.1. Stops and stations in the region range widely from high-quality interchanges in both rural and urban areas such as Hexham bus station and South Shields interchange, to stops with no timetable, signpost or road markings.
- 6.4.2.2. People reporting experiences of low-quality waiting provision at stops and interchanges is a serious problem for the region, with 51% of residents saying waiting at a stop is their main dislike about traveling by bus, rising to 60% for those with a mobility difficulty. Poor waiting facilities at stops acts as a deterrent to people who rarely or never use the bus, and as a barrier to those people considering changing modes. Engagement with stakeholder groups showed the differing dimensions of accessibility when walking and waiting for the bus, as well as the creativity and variation possible in these facilities.
- 6.4.2.3. Whilst two-thirds of the region's residents live within a 5-minute walk of a stop or station, many live much further away. The experience of that walk and the wait for a bus needs to compete with the convenience of car travel.

### 6.4.3. Our Park & Ride Provisions

- 6.4.3.1. Across all modes, the region has an established Park & Ride offer with current sites providing over 4,300 spaces at:
  - 6.4.3.1.1. Tyne and Wear Metro stations and bus interchanges;
  - 6.4.3.1.2. Three bus-based sites with dedicated bus links serving Durham City Centre;

6.4.3.1.3. Newcastle’s bus based Great Park site; and

6.4.3.1.4. 19 National Rail stations across the region.

6.4.3.2. There are frequent examples of instances where people will park on roads, and in some cases, adjacent roads in housing estates to main bus routes, especially longer distance, express routes, to travel by bus.

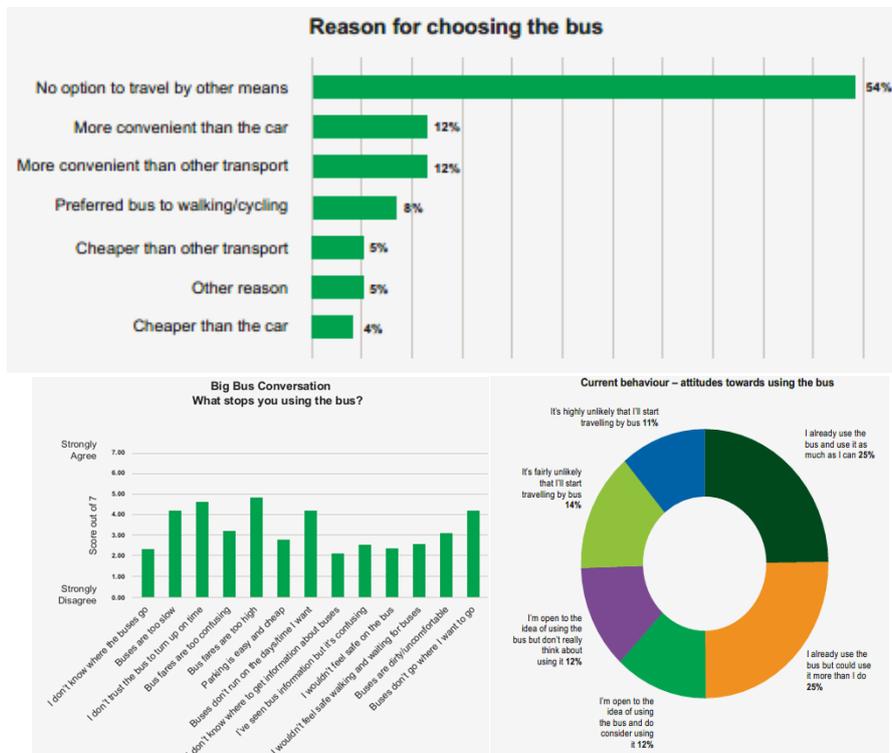
**7. ALL THE RELEVANT FACTORS THAT THE PARTIES CONSIDER WILL AFFECT, OR HAVE THE POTENTIAL TO AFFECT, THE LOCAL BUS MARKET OVER THE LIFE OF THE EP PLAN**

7.1. This section sets out information and data about factors which affect the use of bus services in the region including:

- 7.1.1. Identified barriers to bus use;
- 7.1.2. Perceptions and attitudes toward buses;
- 7.1.3. Car parking: the extent and pricing of parking provisions in towns and cities and the split between local authority and private sector provision. Also, the amount spent by each local authority in the region on parking enforcement; and
- 7.1.4. Other competing and complimentary factors to the bus network in the North East.

**7.2. Identified Barriers To Bus Use**

7.2.1. 1 in 5 people who are avoiding public transport are doing so because they don’t feel safe to use it at the moment. Cleanliness and maintenance are much more important now and are likely to be legacies of Covid with increased user expectations in these areas



**7.3. Car Parking**

- 7.3.1. Decisions on car parking policy sit with each of the individual local authorities and are dependent on a range of factors, such as economic policy, rurality and the range of public transport options available.
- 7.3.2. The relationship between car parking charges and public transport fares can influence how people choose to travel, because of cost and time sensitivities which drive travel behaviours. Adaptations to parking policy, carefully linked to the introduction of an improved public transport offer, can be a means of gradually switching demand towards public transport in a sustainable manner. Instruments such as workplace parking levies can also act as a funding stream to assist with attractive, sustainable alternatives to the car.
- 7.3.3. The cost of car parking, especially in relation to getting the bus, often influences travel choices.
- 7.3.4. The following tables offers a summary of parking provision and spending on parking enforcement in each of the seven local authority areas in the region.

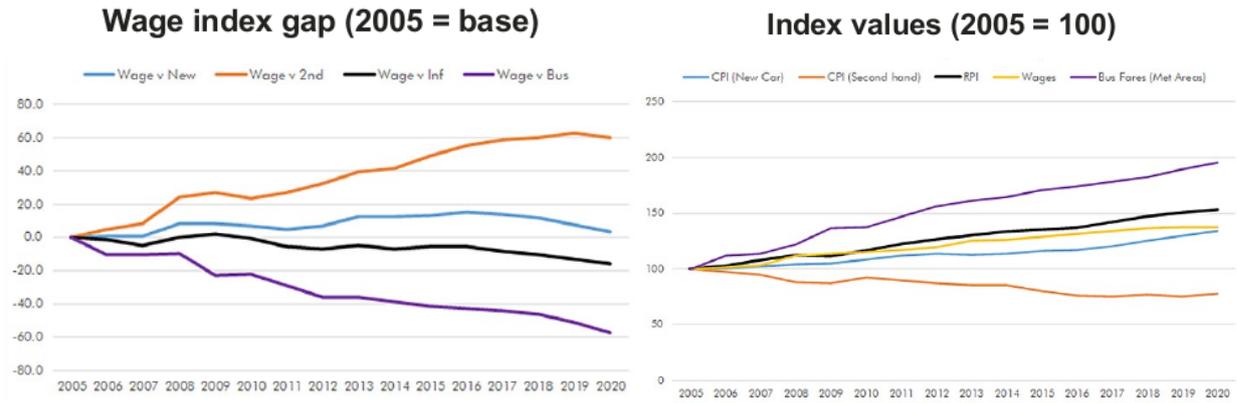
	Estimated number of LA operated spaces	Average hourly rate to park	Estimated number of private sector operated spaces*	Average hourly rate	Local authority	Budget allocated to parking enforcement
Durham	3,500	43p	2000	69p	Durham	£650,000
Gateshead	2,123	£1.04	756	92p	Gateshead	£799,000
Newcastle	6,004	£1.44	3743	£3.20	Newcastle	£2.2m
North Tyneside	2,544	95p	Unknown	N/A	North Tyneside	Part of a contract
Northumberland	11,821	0	0	N/A	Northumberland	£2m
South Tyneside	2,477	75p	270	Varies	South Tyneside	£1.1m
Sunderland	2,958	£1.15	941	£1.47	Sunderland	£950,000

- 7.3.5. TNE will explore and engage with people, businesses and the local authorities in the region over issues of car parking supply and potential deployment of workplace parking levies, congestion charging, and strategic reduction in parking spaces to see if these can be effective tools which can be adopted across the region to encourage a switch to attractive, sustainable transport options such as buses, including considering the introduction of a relationship between the cost of car parking in major centres of retail and employment and the cost of travel on public transport, where it makes economic and strategic sense to do so.

#### 7.4. Other Factors Which May Influence Competition Between Car And Bus:

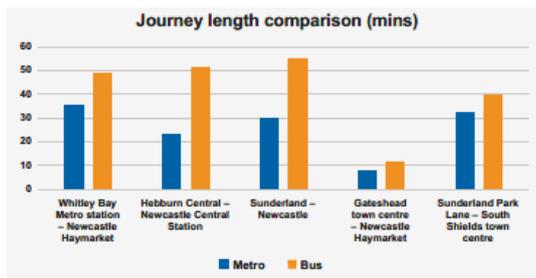
#### 7.5. Relative Affordability Of Bus And Car Travel

- 7.5.1. The relative price of bus and car has become increasingly unfavourable to bus. It can be seen from the graph on the left below that wages have not kept pace with inflation nor with the price of bus fares. The graph on the right compares wages to the cost of these transport modes. For example, the cost of a secondhand car has decreased when compared to wage growth, whereas the cost of bus fares has increased when compared to wage growth.

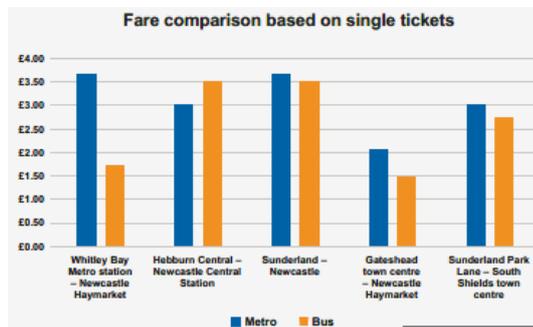


**The Tyne and Wear Metro system**

- 7.5.2. The Metro and bus networks complement each other and interchange is generally accessible and well signposted. Many people transfer from bus to Metro, whilst those who perceive interchange as a high penalty take through journeys on the bus.
- 7.5.3. The Metro appears a competitor to bus for some journeys, but it also brings people to the bus for the first leg of a journey they might otherwise make by car.
- 7.5.4. The below graph shows that for a sample of journeys that can be completed by either bus or Metro, the bus takes longer for every journey.



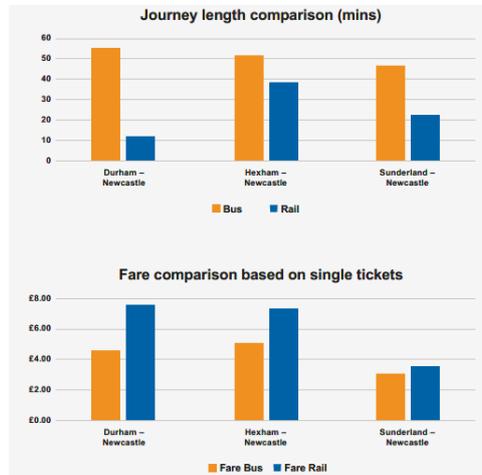
- 7.5.5. The below graph shows that for fare cost based on single tickets, buses compare favourably to Metro for some of the journeys, however Metro prices can also be cheaper, or near to the same cost. This means that the customer has a choice of transport which can depend on the customer's priorities of a faster or cheaper journey.



- 7.5.6. Nevertheless the basic structure for integrated public transport continues to exist in the region. Network One provides integrated multi-modal tickets, transport interchanges continue to see many thousands of interchange journeys each day between bus and Metro, and peoples' travel habits – often the same since childhood – continue to see a combined bus and Metro journey on many trips. Indeed for some trips a combined bus and Metro journey is the only viable public transport combination.

**7.6. The National Rail Network**

- 7.6.1. The geographic size of the region means that key centres are linked by rail, including ‘Intercity’ long distance trains. These services co-exist alongside well-used bus services, because buses serve more local places along the way and more ‘first and last mile’ origins and destinations.
- 7.6.2. The graphs below show some sample journey times and fare comparisons between rail and bus.



- 7.6.3. For most of the journeys we are aware of, it is slower to travel by bus, however it is almost always cheaper. There will therefore be a significant number of people who travel by bus instead of rail even though it takes longer.

**7.7. Integration Between Bus and Active Travel**

- 7.7.1. Active travel is wholly complementary to the bus network, especially as every bus journey starts and ends with an element of active travel.
- 7.7.2. Already, early measures are in place to promote the opportunity for multi-modal trips including bike and bus. For example, six Go North East routes have capacity to carry two unfolded bikes, and stations across the Tyne and Wear Metro system are fitted out with approximately 750 places for cycles, much of which takes the form of digitally operated cycle lockers.

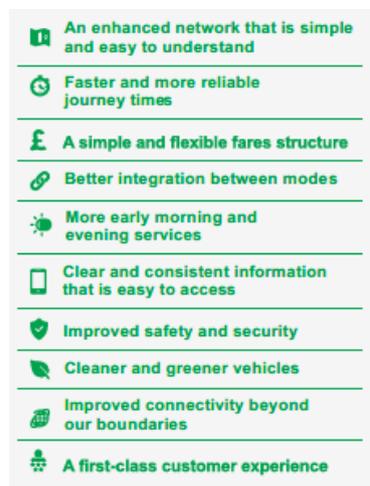
**8. THE OBJECTIVES OF THE EP PLAN – IN TERMS OF HOW IT WILL IMPROVE THE QUALITY AND EFFECTIVENESS OF LOCAL BUS SERVICES IN THE CORRESPONDING EP SCHEME AREA**

- 8.1. The Transport Plan adopted by the NEJTC in March 2021 provides the strategic framework to support delivery of an improved, more seamless, coordinated and integrated transport system across the region. It sets out how transport can help support the wider goals of creating and sustaining more and better jobs in a growing and decarbonised economy, where social and health inequalities are greatly reduced.
- 8.2. The vision statement for the Transport Plan is: “Moving to a green, healthy, dynamic and thriving North East”. This vision is supported by five strategic objectives for transport in our region:
  - 8.2.1. Carbon-neutral North East;
  - 8.2.2. Overcome inequality and grow our economy;
  - 8.2.3. Healthier North East;
  - 8.2.4. Appealing, sustainable transport choices; and
  - 8.2.5. Safe, secure network.

- 8.3. They are reflective of the critical strategic issues such as the Climate Emergency declared by each of the region's Local Authorities and Combined Authorities, the ambition for a clean and green recovery from the pandemic and the need to address the health of the region.
- 8.4. Central to the Transport Plan is a policy named: “Making the Right Travel Choice”. This policy sets out the actions that need to be enabled, through interventions on the transport system, to drive progress against the objectives.
- 8.5. The policy of ‘Making the Right Travel Choices’, leaves no doubt: the region is committed to positioning buses as an appealing and sustainable transport choice which people should choose ahead of a car whenever possible.
- 8.6. The goal in North East England is to do more than just provide a sustainable transport network – it should be made attractive, so people want to use it.

**9. WHAT OUTCOMES NEED TO BE DELIVERED TO IMPROVE LOCAL BUS SERVICES IN THE EP PLAN AREA**

9.1. In June 2021, the NEJTC published a high-level strategic vision document called ‘Your Vision for Buses’. This document was developed in partnership with the region’s bus operators and considers the role that buses can play in delivering the Transport Plan. In doing so, it sets out Ten Solutions for the bus network – and asks the region to consider and test these solutions. These Ten Solutions are aligned with the Government’s ‘National Bus Strategy’.



9.2. Key Performance Indicators (KPIs) have been developed jointly by NEbus and the NEJTC and link to the Transport Plan objectives.

9.3. In most cases a baseline year of 2018/19 has been chosen for the KPIs, because that was the last full financial and reporting year where bus ridership and road traffic levels were not affected by the Covid-19 pandemic.

- 9.4. Firstly it is necessary to repair the damage caused by Covid-19 to bus ridership in the region.
- 9.5. Then the intention is to progress to a position where a higher proportion of people choose the bus to travel, leading to a significantly higher number people using buses – especially for journeys to work and education and in rural areas. This will lead to growth in bus patronage.
- 9.6. This will only happen when people see tangible improvements made to bus services, which will be measured through improved customer satisfaction. For passengers to be happy buses must be punctual and reliable, and buses need to be faster and not caught in congestion.
- 9.7. Although getting more people on the bus and growing its modal share will of itself improve environmental performance, a continuous improvement in the emission standards of the bus fleet will also be targeted.

**9.8. KPIs that will need to be delivered to improve local bus services in the EP Plan area**

**9.8.1. Recovering from Covid-19**

9.8.1.1. **KPI 1:** Bus ridership to achieve 154.4m trips during the year 2022/23, returning us to the baseline level of 2018/19.

**9.8.2. Modal Share**

9.8.2.1. **KPI 2:** Modal share of buses to grow by 1 percentage point in 2023/24 from the baseline of 6.4%, and a further 1 percentage point in 2024/25.

9.8.2.2. **KPI 3:** Modal share of bus use for journeys to work and education to grow by 1 percentage point in 2023/24, and a further 1 percentage point in 2024/25.

### 9.8.3. Patronage

9.8.3.1. **KPI 4:** Bus patronage to grow by 10% in 2023/24, and then by a further 10% in 2024/25.

9.8.3.2. **KPI 5:** Bus patronage from people under the age of 25 to grow by 10% in 2023/24, and then by a further 10% in 2024/25.

9.8.3.3. **KPI 6:** Bus boarding at rural bus stops to grow by 10% in 2023/24, and then by a further 10% in 2024/25.

### 9.8.4. Customer Satisfaction

9.8.4.1. **KPI 7:** Overall bus passenger satisfaction to grow from a baseline of 91% to 92% in 2023/24 and to 93% in 2024/25.

### 9.8.5. Bus Performance

9.8.5.1. **KPI 8:** Average speed of buses to grow, relative to the average speed of general traffic, in each year of the EP Plan.

9.8.5.2. **KPI 9:** Bus reliability to be 99.5% throughout the period of the EP Plan.

9.8.5.3. **KPI 10:** Bus punctuality at point of origin to be 95% in 2022/23, 96% in 2023/24 and 97% in 2024/25.

9.8.5.4. **KPI 11:** Bus punctuality at all timing points point of origin to be 90% in 2022/23, 95% in 2023/24 and 95% in 2024/25.

### 9.8.6. Environmental Performance

9.8.6.1. **KPI 12:** Bus fleet emission standard to Euro 6 or better to be 63.2% in 2022/23, 80.8% in 2023/24 and 91.1% in 2024/25 and to be 100% at the start of 2025/26.

## 10. WHAT OVERALL INTERVENTIONS NEED TO BE TAKEN TO DELIVER THOSE OUTCOMES

10.1. Subject to adequate funding, the following improvements have been identified to deliver the strategic objectives and to achieve the targets. These measures will enhance the experience of current bus users and make bus use a more attractive proposition to those who don't currently use the bus.

10.2. Within this section are five main subsections:

10.2.1. Customer Experience;

10.2.2. Fares and Ticketing;

10.2.3. The Network;

10.2.4. Highways and Infrastructure; and

10.2.5. Delivering the BSIP through the Enhanced Partnership.

### 10.3. Customer Experience

- 10.3.1. Multi-operator ticketing and journey planning will be made available to passengers through a single dedicated website and accompanying app. We will also continue to provide leaflets and printed information.
- 10.3.2. We will develop a new and consistent logo for The Partnership that will be applied across the network, so that it becomes a recognisable symbol of public transport for the North East.
- 10.3.3. The 420 bus stops with existing real-time information will be updated to next generation systems . A further 100 stops will be updated with the technology.
- 10.3.4. We will provide clear printed information at stops and stations, including in rural areas, and maintain it.
- 10.3.5. We will improve CCTV provision throughout our entire network, ensuring coverage of every major station and stop across the region. 700 moveable CCTV cameras will be available to be deployed across the region, in areas where there is demand for them or areas where there is deemed to be a safety risk. The cameras will be remotely accessible and information from them can be accessed on an on-demand basis.
- 10.3.6. We will provide seamless service information to customers, offering a single source of truth, feeding to any connected systems for passenger information.
- 10.3.7. All newly manufactured vehicles will be fitted with enhanced next-stop audio-visual equipment, charging points and Wi-Fi as standard.
- 10.3.8. We will develop a consistent training module to be delivered to all our colleagues who fulfil a direct customer experience role.
- 10.3.9. A taxi guarantee will give disabled passengers the peace of mind that if there isn't room for their wheelchair on board, a taxi replacement will be provided for them at no extra cost if quicker than waiting for the next bus.
- 10.3.10. Turnaround cleaners will be based at bus stations throughout our network. They will be available to quickly clean any operators' bus to ensure a clean and pleasant journey on any bus.
- 10.3.11. All interchanges and rail stations will be supported with multi-modal passenger information, showing real-time information about connecting journeys.
- 10.3.12. Transport ambassadors will be available at key interchanges throughout the network to guide passengers and help them make the right travel choices.
- 10.3.13. Improvements will be made to wayfinding in major stations and interchanges through new posters showing where to catch your bus.

#### 10.4. **Fares and Ticketing**

- 10.4.1. Network One and its tickets will be valid for travel on all bus, Metro and Ferry services across the North East, as well as on rail services between Sunderland, Newcastle, Metrocentre and Blydon. It will also cover Demand Responsive Transport (DRT) services provided through our partnership. Network One, which is the trading name of Network One Ticketing Ltd, will re-brand itself as part of the launch of the new product range.
- 10.4.2. Network One will simplify its zonal structure and price multi-modal tickets more attractively.  
..
- 10.4.3. A complete pricing structure will be developed using the daily fare as the starting point. The range of products will include weekly, monthly, annual, flexi (for commuters who travel regularly but not every day) and student discount.

- 10.4.4. To further improve the offer, additional low cost, multi modal, multi operator fares will be developed to make pricing more affordable in areas that are a short distance from a zone boundary.
- 10.4.5. Our multi-modal fares will be available in two forms:
  - 10.4.5.1. a ticket purchased before travel begins (from a bus driver, via Metro retail channels, online or through an app);
  - 10.4.5.2. a price “cap” that is automatically calculated and applied when a customer uses a contactless bank card, mobile phone payment app or Pay As You Go smartcard to pay for travel. Through the BSIP we intend to put in place the back-office system and upgrade existing ticketing equipment to allow this to happen.
- 10.4.6. Our simplified multi-modal products will be displayed and advertised clearly throughout the region and will also feature in electronic and printed bus and Metro information and in specific marketing campaigns.
- 10.4.7. We will introduce tickets for under-19s across the region, with a target low cost fare for single tickets and an economical target region wide multi-modal fare cap. The mechanism for delivering this will be further explored.
- 10.4.8. The current Metro ‘Take the Kids for Free’ offer has been trialled on buses and will be explored with the aim for it to be made permanent.
- 10.4.9. We will carry out a study to examine the costs and benefits of standardisation of the local additions to the ENCTS throughout the region.
- 10.4.10. A care experienced concession will be available throughout the region. The fare to be set will be agreed through the Care Leaver Covenant.
- 10.4.11. The fares package we propose by its nature deals with integrated, multi-modal ticketing. Bus operators will continue to offer their own bespoke range of tickets which in many cases will still be the cheapest way to travel by bus.
- 10.4.12. Some fares already on offer are very attractive. For example, some operators offer cheaper fares in the evenings. We encourage all bus operators to adopt simple and affordable pricing structures and to simplify zonal pricing so that there is a common approach region-wide. Although this is out of scope for the EP, we believe that bus operators will consider it under their own decision-making processes.

**10.5. Network**

- 10.5.1. The NEJTC will work with operators with a view to securing sufficient funding to maintain their current networks once Bus Recovery Grant ceases.
- 10.5.2. The NEJTC will similarly work with local authorities and Nexus with a view to securing sufficient funding to maintain their ‘socially necessary’ (secured) services.
- 10.5.3. There will be more early morning, evening and overnight services as well as better connections beyond our boundaries.

<b>Category</b>	<b>Monday to Saturday Daytime</b>	<b>Sunday Daytime</b>	<b>Daily Evening</b>	<b>Overnight</b>
Superbus	5-10	7-15	15-30	
Interurban Express	15	30	30	
Connect	30	60	60	
Rural	60-120	120		

Remote Rural and targeted groups	DRT, Special	DRT, Special		
Night network				60

10.5.4. **Superbus** will have two variants:

- 10.5.4.1. Superbus Red Corridors will run at least every five minutes from 0630 until 1830 on Mondays to Fridays and from 0730 until 1830 on Saturdays. There will be buses every 7-8 minutes from 0830 until 1830 on Sundays, every 15 minutes during the early morning and evening.
- 10.5.4.2. Superbus Green Corridors will run at least every 10 minutes from 0630 until 1830 on Mondays to Fridays and from 0730 until 1830 on Saturdays. There will be buses every 15 minutes from 0830 until 1830 on Sundays and every 30 minutes during the early morning and evening.
- 10.5.4.3. Superbus services will be made more attractive by the investment in bus priority provided for in the BSIP.
- 10.5.4.4. We will build on the success of our existing night buses by introducing them on Superbus Corridors where there is established demand.
- 10.5.5. **Interurban Express** services will knit our region together better, providing fast links into our cities and major towns from the surrounding towns and villages. Buses will run up to every 15 minutes on Monday to Saturday daytimes and every 30 minutes in the evening and on Sundays. They will operate on a ‘limited stop’ basis within cities to minimise journey times, complementing the Tyne and Wear Metro and National Rail network. Buses will provide high standards of comfort and on-board service.
- 10.5.6. **Connect** will be the network of socially and economically necessary links between the local, sub-regional and regional centres in our region, complementing the Tyne and Wear Metro, National Rail and interurban express services. Buses will run at least every 30 minutes on Monday to Saturday daytimes, hourly in the evening and on Sundays.
- 10.5.7. **Rural corridors** will be tailored to the specific requirements of the communities they serve, with buses running at least every two hours on Monday to Saturday daytimes.
- 10.5.8. We will deliver a range of improvements in the rural areas of South West Durham and West Northumberland, including better Monday to Saturday daytime services and new Sunday journeys where there is potential demand. In particular, we will introduce a new service to Kielder in the Northumberland National Park and ensure that buses run all year round to the UNESCO World Heritage site of Hadrian’s Wall.
- 10.5.9. We will also ensure that rural services are fully integrated with other bus routes and modes of transport, as we know the importance of effective connections in rural areas.
- 10.5.10. We will launch two pilot rural Demand Responsive Transport (10) operations in the second year of our BSIP.
- 10.5.11. We will partner with schools in a pilot scheme to market our new home-to-school offer and, using centrally-procured route planning technology, plan efficient bus routes to the school considering the postcodes of subscribing families.

10.5.12. We will accelerate operators' existing bus replacement programmes so that all vehicles are Euro VI standard or Zero-emission by March 2025.

10.5.13. We will trial hydrogen vehicles and install hydrogen refuelling stations to support them.

## 10.6. Highways and Infrastructure

Subject to the outcome of any required legal processes which may apply (for example where traffic regulation orders are required), we plan to deliver the highways and infrastructure interventions set out in this section 10.6:

10.6.1. We will deliver major highways interventions to accelerate bus journey times and increase punctuality and reliability on 17 of our busiest corridors in the region:

10.6.1.1. West of Newcastle (BRT), Wallsend, Coast Road (BRT), A188/A189 North Tyneside, Dunston, Bensham Road, Leam Lane, Old Durham Road, Chester Road, Sunderland, A690 Sunderland, South Shields to Sunderland, South Shields to Newcastle, Blyth Cowpen Road, Cramlington, Morpeth, Seaton Burn, Durham A167.

10.6.1.2. The vast majority of bus routes in our network use these 17 corridors for all or part of their journey. As a result, the investment we are planning to deliver will have a major benefit for bus journey time, reliability and punctuality across the entire bus network in the North East.

10.6.2. Major highways interventions improvements will be delivered in two tranches:

10.6.2.1. We are already developing business cases to deliver Tranche 1 schemes once rigorous public consultation has taken place and design work is complete; and

10.6.2.2. Tranche 2 schemes are deliverable in the EP Plan time frame, but not yet at Business Case so require further development and consultation.

10.6.3. We will also deliver a series of 'spot fix' interventions which will tackle isolated pinch-points which may not necessarily be situated along a high frequency corridor, but will contribute to better bus performance throughout the region. Examples include Northern South Tyneside, central Durham, Bishop Auckland, West Gateshead and Northern North Tyneside.

10.6.4. Our region is committed to investment in highways infrastructure which could include road space reallocation, junction redesign, traffic signal re-prioritisation, bus gates and other measures designed to improve bus services.

10.6.5. We will contribute to already planned investment in the region's highways in the Intelligent Transport Systems (ITS) project to ensure the potential for bus priority in this project is maximised.

10.6.6. Our local authorities are also willing to consider changes to on-street parking and moving traffic enforcement on these and other corridors, to the extent that red corridors could be introduced, subject to public consultation.

10.6.7. We plan to bring a consistent standard throughout the region's bus shelters and stops:

10.6.7.1. 1,350 shelters which are unwelcoming and poorly used will be replaced by modern facilities which will include lighting, CCTV and high-quality pedestrian access to increase safety;

10.6.7.2. 240 shelters and stops with particularly high usage will have an additional high specification applied; and

10.6.7.3. a strategic plan will be developed to select 'hub' shelters that can serve as a community focus for interchange opportunities, between bus routes, with cycling and

walking, with National Rail, ferry, Metro and our Pocket Park & Ride and Kiss & Ride.

- 10.6.8. We will replace all our bus stop ‘flags’ to ensure consistent standards throughout the region.
- 10.6.9. New bus stations will be delivered in Durham, Alnwick, Bishop Auckland and an additional Newcastle City Centre bus station. There are further plans to improve existing bus interchanges and smaller bus stations, bus access to North Shields Fish Quay and the International Advanced Manufacturing Park (IAMP).
- 10.6.10. We will introduce five new major Park & Ride sites in the region, served by high-specification vehicles running a dedicated service for Park & Ride customers.
- 10.6.11. These will benefit from the major highways infrastructure investments along our 17 busiest bus corridors.
- 10.6.12. We will establish formal ‘Pocket Park & Ride’ locations around the network, with a modest number of car parking spaces, supported by high-quality information and waiting facilities. These sites will be situated along major express bus routes and some will also serve as likely interchange sites between the DRT proposal set out in our BSIP.

#### **10.7. Delivering the BSIP through the Enhanced Partnership**

- 10.7.1. A significant marketing budget will be used to drive growth in bus patronage and to highlight key improvements and initiatives. Activities will be delivered on the ground by a range of partners (including bus operators, Nexus and Local Authorities), augmented by partnership-level campaigns through contracts procured by TNE.
- 10.7.2. We will use dedicated team members to collaborate with businesses including industrial estates and sites, large public sector employers and hospitals, with the objective of encouraging employees to switch to the bus.
- 10.7.3. We will provide a dedicated team and budget to work with communities, especially those who currently feel excluded from public transport, to encourage greater bus use:
  - 10.7.3.1. a fund to allow volunteers to train as ‘Community Bus Ambassadors’ or ‘Bus Buddies’,
  - 10.7.3.2. work with groups in minority and harder to reach communities, and people with additional needs so that they can promote ideas to make buses more accessible for them and increase confidence in using the bus,
  - 10.7.3.3. Village, parish and town councils will be provided with marketing collateral to promote travelling to an event by bus, where possible this could be backed up with promotional event ticketing offering discounted or free bus travel to community events, and
  - 10.7.3.4. an ‘Adopt a Bus’ scheme with organisations such as schools to foster community engagement.
- 10.7.4. We commit to exploring and engaging with people and businesses in the region over issues of car parking supply and potential deployment of work place parking levies, congestion charging, and strategic reduction in parking spaces to see if these can be effective tools which the region can adopt across our geography to encourage a switch to attractive, sustainable transport options such as buses.
- 10.7.5. We will also discuss the introduction of a relationship between the cost of car parking in major centres of retail and employment and the cost of travel on public transport, where it makes economic and strategic sense to do so.

- 10.7.6. We will create a North East Bus Partnerships team to manage the programme of investments and activities set out in the BSIP, to oversee the performance of the bus network and to manage the partnership agreement.
- 10.7.7. We will put in place a formalised Change Management Process with community engagement at its heart, that will see all major changes that are proposed for our bus network to be clearly set out, consulted upon, and following the consideration of feedback, introduced in a structured and well-communicated manner.

#### **10.8. Reporting**

- 10.8.1. A Bus Passenger Charter will apply on all bus services in our region to build customer confidence and to improve consistency and transparency.
- 10.8.2. We will report on progress towards our KPIs on a six-monthly basis to our Bus Partnership Board, and onward to the Department for Transport (DfT) and other key stakeholders, and publish the information on our website and in a non-digital format.

### **11. PLANS FOR CONSULTING OPERATORS AND PASSENGER GROUPS ON HOW WELL THE EP PLAN AND EP SCHEME(S) ARE WORKING**

- 11.1. NEbus and the NEJTC have agreed shared objectives and KPIs. Progress towards our KPIs will be reviewed on a regular basis to assess whether the actions being taking are leading to success or whether corrective action needs to be taken.
- 11.2. The partnership between NEbus and the NEJTC provides an opportunity to reset many aspects of the North East's bus network, including addressing how bus passengers feel about the standard of service on offer and whether it meets their expectations. This will be done on a consistent basis, regardless of which operator customers are travelling with. The goal will be to achieve a far greater sense of community ownership over the bus network, so that local people feel that the bus is a community asset that responds to their needs and helps them to achieve their goals and objectives. Once this happens, it is far more likely that people in the community will feel inclined to use the service on a regular basis.
- 11.3. A Bus Passenger Charter (BPC) will describe what passengers can expect from bus services in the North East. Having a charter in place will enable passengers to hold bus operators and local authorities to account for delivering against this EP Plan. The BPC will signpost passengers to routes for recourse, enabling them to provide feedback on how authorities and operators are performing in meeting their commitments in this EP Plan.

#### **11.4. Reporting to the Regional Enhanced Bus Partnership Board and to the Department for Transport**

- 11.4.1. TNE will produce a six-monthly report to the Regional Bus Enhanced Partnership Board. It will set out the latest available data by which to measure the partnership's performance against its KPIs.
- 11.4.2. The report will contain commentary to explain why targets are being met, not met, or exceeded, and will include supplementary information such as long-term trends, social and economic trends that may help to understand performance and benchmarking information.
- 11.4.3. The report will set out the actions that have been taken by the partnership in the previous six-month period, and the actions that are planned for the following six-month period.
- 11.4.4. As well as focusing and reporting on 'hard' data in the shape of KPI performance, qualitative data will also be included in the report, to evidence how users actually feel about the network, and what has been said in relation to the new service provision. First-hand feedback like this cannot be underestimated, as it provides a true insight into the minds of the consumer. Effort will be made to record and analyse in-person customer feedback, as well as providing analysis of social media comments. This routine exercise will help to set the KPIs within the context of the bus user and the narrative around the new network.

- 11.4.5. Local Bus Boards and the business and services-focused North East Bus Advisory Panel will be consulted over the report. The report will be sent to the NEJTC and may also be provided to other stakeholders with an interest, such as individual local authorities and Nexus.

### **11.5. Bus Passenger Charter (BPC)**

- 11.5.1. The BPC will ensure performance information is accessible and easy to understand.
- 11.5.2. The BPC does not create any new legal relationship with passengers, it sets out commitments to:
  - 11.5.2.1. Outline the standards of service customers can expect from buses in the North East, such as punctuality, vehicle cleanliness, proportion of services operated, accessibility of buses and related infrastructure to groups with protected characteristics.
  - 11.5.2.2. Update on performance on a six-monthly basis relative to the KPIs for the partnership that are shown in section 9.8 of this EP Plan.
  - 11.5.2.3. Make available six-monthly reports on the TNE website, supplemented by communication channels appropriate to the relevant audiences.
  - 11.5.2.4. Identify where KPIs are not being met and describe the measures being taking to ensure these are met in future.
  - 11.5.2.5. Advise customers on how to obtain local travel and general public transport information, and how to travel safely.
  - 11.5.2.6. Inform customers of the complaints process to follow if something goes wrong or the service falls below the expected standard, as well as providing routes to gather other feedback.
  - 11.5.2.7. Inform customers on how to offer improvement suggestions.
  - 11.5.2.8. Advise customers on who to contact and provide appropriate channels.
  - 11.5.2.9. Publicise upcoming planned improvements and changes and advise customers how they can play a part in future proposals.

## **12. HOW THE RELATED EP SCHEME(S) ARE INTENDED TO ASSIST IN IMPLEMENTING THE POLICIES AND ACHIEVING THE OBJECTIVES SET OUT IN THE EP PLAN**

The initial EP Scheme provides both a framework for implementation of the EP Plan through the governance arrangements set out in section 8 of the EP Scheme, and also implements a number of measures and requirements which start implementation of the EP Plan. In particular:"

- 12.1. Measures set out in the EP Scheme start to implement many of the customer experience objectives with clear, consistent information provision being introduced over the period of the EP Scheme, including a common approach to real time information, multi-modal passenger information, and provision at bus-stops;
- 12.2. Ticketing measures introduced in the initial EP Scheme include a common pay-as-you-go ITSO compliant smartcard, and all-day multi-operator adult and under 19 fares across the region;
- 12.3. New buses will be expected to meet the Euro VI standard and incorporate next-stop audio visual equipment;
- 12.4. A number of major highway interventions will be delivered on some of the busiest corridors with traffic signal upgrades on six key corridors being delivered through the initial EP Scheme to allow full traffic control interventions;
- 12.5. The EP Scheme provides a framework for reporting on KPIs, and a mechanism to introduce further measures as they are agreed between the Authorities and Operators.

13. **THE INTENDED EFFECT OF THE EP SCHEME(S) ON NEIGHBOURING AREAS THAT ARE OUTSIDE THE EP PLAN AND EP SCHEME(S) AREA**

The EP Scheme specifically exempts services which have over 50% of their route outside the EP Plan Area, so is not intended to apply requirements to services which operate predominantly in neighbouring areas, and therefore it is expected that the effect of the EP Scheme on neighbouring areas will be limited. Whilst the EP Scheme does impose some requirements on new vehicles these are not deemed onerous for new vehicles, and the initial EP Scheme does not require operators to upgrade their vehicles to meet new standards. To the extent any cross boundary operators are not exempt and have to comply with the ticketing standards specified in the EP Scheme, the initial EP Scheme does not seek to cap the required multi-operator fares, and therefore these will be set by the operators on a commercial basis initially. As a result the EP Scheme is not expected to materially affect neighbouring areas.

## **TRANSPORT NORTH EAST**

### **ENHANCED PARTNERSHIP SCHEME**

**THE NORTH EAST JOINT TRANSPORT COMMITTEE ENHANCED PARTNERSHIP SCHEME FOR BUSES IS MADE IN ACCORDANCE WITH SECTION 138G(1) OF THE TRANSPORT ACT 2000 BY:**

**The Durham, Gateshead, South Tyneside and Sunderland Combined Authority**, known as the North East Combined Authority ("**NECA**") (comprising of the local authority areas of Durham County Council, Gateshead Council, South Tyneside Council and Sunderland City Council);

**The Newcastle Upon Tyne, North Tyneside and Northumberland Combined Authority** known as the North of Tyne Combined Authority ("**NTCA**") (comprising of the local authority areas of Newcastle City Council, North Tyneside Council and Northumberland County Council);

**Tyne & Wear Passenger Transport Executive ("**Nexus**")** of Nexus House, 33 St James' Boulevard, Newcastle upon Tyne, NE1 4AX;

**The County Council of Durham** of County Hall, Aykley Heads, Durham, DH1 5UZ ("**Durham**");

**The Borough Council of Gateshead**, Civic Centre, Regent Street, Gateshead, NE8 1HH ("**Gateshead**");

**The Council of the City of Newcastle upon Tyne**, Newcastle Civic Centre, Barras Bridge, Haymarket, Newcastle upon Tyne, NE1 8QH ("**Newcastle**");

**The Council of the Borough of North Tyneside**, The Quadrant, The Silverlink North, Cobalt Business Park, North Tyneside, NE27 0BY ("**North Tyneside**");

**Northumberland County Council**, County Hall, Morpeth, NE61 2EF ("**Northumberland**");

**The Council of the Borough of South Tyneside**, Town Hall & Civic Offices, Westoe Rd, South Shields, NE33, 2RL ("**South Tyneside**"); and

**The Council of the City of Sunderland**, City Hall, Plater Way, Sunderland, SR1 3AA ("**Sunderland**").

#### **1. EP SCHEME CONTENT**

1.1 This document fulfils the statutory requirements for an EP Scheme as set out in the Transport Act 2000 as amended by the Bus Services Act 2017. In accordance with the statutory requirements in sections 138A to 138S of the Transport Act 2000, the EP Scheme document sets out:

- 1.1.1 the area covered by the EP Scheme (section 3);
- 1.1.2 the commencement date and period of operation (section 4);
- 1.1.3 Facilities and Measures (section 6);

- 1.1.4 requirements in relation to local services (section 7); and
- 1.1.5 governance arrangements including variation and revocation (section 8).
- 1.2 The EP Scheme can only be put in place if an associated EP Plan has been made. Therefore, this document should be considered alongside the North East Enhanced Partnership Plan.
- 1.3 This EP Scheme has been jointly developed by the North East Joint Transport Committee ("NEJTC"), Local Highway Authorities, Nexus and those bus operators that provide Local Services in the EP Scheme area.
- 1.4 The EP Scheme sets out obligations and requirements on the Authorities including Local Transport Authority and Local Highway Authorities, and operators of Local Services in order to achieve the intended improvements, with the aim of delivering the objectives of the North East Enhanced Partnership Plan.

## 2. Defined Terms

- 2.1 The following terms are used in this EP Scheme:
  - 2.1.1 **"AQPS"** – means an Advanced Quality Partnership Scheme made pursuant to section 113C of the Transport Act 2000 (as amended by the Local Transport Act 2008 and the Bus Services Act 2017).
  - 2.1.2 **"Authority"** means each Local Transport Authority, each Highway Authority and Nexus and **"Authorities"** shall be construed accordingly.
  - 2.1.3 **"Bus Lane"** means a signposted lane, designated for use by registered local bus services and (where specified) taxis and other authorised vehicles, at the times indicated by the relevant signage.
  - 2.1.4 **"Bus Lane Enforcement"** means action taken to ensure that bus lanes and bus gates are used only by authorised vehicles.
  - 2.1.5 **"Bus Stand"** means a clearway as defined in accordance with paragraph 1 of Part 6 to Schedule 7 of The Traffic Signs Regulations and General Directions 2016 which is marked "BUS STOP", but which permits or will permit a local bus to stand within the clearway for as long as may be necessary up to a maximum period of 10 minutes.
  - 2.1.6 **"Code of Conduct"** means the code of conduct to be developed in accordance with the measure with reference Serv05 which is set out in the table in Schedule 2 of this EP Scheme, an indicative draft of which is set out at Annex 1 to Schedule 2 of this EP Scheme.
  - 2.1.7 **"Excluded Local Service"** has the meaning given to 'excluded local service' in Regulation 3(2) of the Enhanced Partnership Plans and Schemes (Objections) Regulations 2018 (SI 2018/404), and Excluded Local Services shall be construed accordingly.
  - 2.1.8 **"EP Plan"** means an enhanced partnership plan as defined in section 138A(3) of the Transport Act 2000.
  - 2.1.9 **"EP Scheme"** means an enhanced partnership scheme as defined in section 138A(5) of the Transport Act 2000, and **"this EP Scheme"** shall be construed as a reference

to the EP Scheme made pursuant to this document, as may be amended or varied from time to time in accordance with its terms or pursuant to section 138K of the Transport Act 2000.

- 2.1.10 **"EP Scheme Area"** means the area to which this EP Scheme applies.
- 2.1.11 **"Facilities"** shall have the meaning given in section 138D(1) Transport Act 2000 and shall include assets that are provided at specific locations along particular routes (or parts of routes) within the EP Scheme Area or new and improved bus priority measures with are made within the EP Scheme Area;
- 2.1.12 **"Local Authorities"** means Durham, Gateshead, Newcastle, North Tyneside, Northumberland, South Tyneside and Sunderland.
- 2.1.13 **"Local Bus Board"** has the meaning given to it in section 8.3.1.
- 2.1.14 **"Local Highway Authority"** means a Local Authority with responsibility for the maintenance of highway infrastructure in its local authority area.
- 2.1.15 **"Local Transport Authority"** has the meaning given to it in section 108(4) of the Transport Act 2000 and for the purposes of this EP Scheme shall include references to NECA and NoTCA as the case may be.
- 2.1.16 **"Local Service"** has the meaning given to it in section 2(1) of the Transport Act 1985.
- 2.1.17 **"Measures"** shall have the meaning given in section 138D(2) of the Transport Act 2000 and shall include improvements which have the aim of:
- 2.1.17.1 increasing the use of Local Services serving the routes to which the measures relate or ending or reducing a decline in their use; or
- 2.1.17.2 improving the quality of Local Services.
- 2.1.18 **"North East Enhanced Partnership Plan"** means the EP Plan made by the Authorities pursuant to section 138A of the Transport Act 2000 and which is required to be in place for this EP Scheme to be made.
- 2.1.19 **"Operator"** means an operator of a Local Service within the EP Scheme Area which is not exempt pursuant to section 5.
- 2.1.20 **"Panel"** has the meaning given to it in section 8.2.1.
- 2.1.21 **"Partnership Board"** has the meaning given to it in section 8.1.1.
- 2.1.22 **"Qualifying Operator"** means an Operator except where such Operator only operates Excluded Local Services.
- 2.1.23 **"Scheme Commencement Date"** means the date on which this EP Scheme comes into operation, as specified in section 4.1.
- 2.1.24 **"Transport North East"** or **"TNE"** is the name of the officer group that supports the NEJTC in developing and delivering transport and strategy across the EP Scheme Area.

- 2.1.25 **"TRO"** or **"Traffic Regulation Order"** means a traffic regulation order made under the Road Traffic Regulation Act 1984 or any other enactment regulating the use of roads or other places.

### **3. SCOPE OF THE EP SCHEME AND COMMENCEMENT DATE**

#### **3.1 Description of Geographical Coverage**

The EP Scheme will support the improvement of all local bus services operating in the administrative areas of the NECA and the NTCA, except any local bus services which are exempt from the requirements of the EP Scheme in accordance with section 5.

#### **3.2 Map of EP Plan and EP Scheme Areas**

A map of the EP Plan and EP Scheme Area is included at Schedule 1 (*EP Plan and EP Scheme Area*).

### **4. COMMENCEMENT DATE**

- 4.1 This EP Scheme is made on [**Note: date to be inserted**]and shall come into operation on [**Note: date to be inserted**].
- 4.2 The EP Scheme shall have an initial term of 3 years and will be reviewed annually in accordance with section 8 (*Governance Arrangements*) of this EP Scheme.

### **5. EXEMPTED SERVICES**

The following Local Services are exempt from the requirements of the EP Scheme:

#### **5.1 In respect of all Local Services operating in the area of the EP Scheme:**

- 5.1.1 Any Local Service which is primarily operated as a replacement service for Metro, rail or ferry services;
- 5.1.2 Any Local Service which is operated by a vehicle which it has been agreed, by the relevant Authority, acting reasonably is intended primarily for novelty or leisure purposes rather than as a standard local service;
- 5.1.3 Any Local Service which has over 50% of their route mileage outside the area of this EP Scheme;
- 5.1.4 Any Local Service which forms part of a longer route which is not registered as a Local Service and operates as a long-distance scheduled coach service;
- 5.1.5 Any Local Service which is registered as a flexibly routed local bus service;
- 5.1.6 Any Local Service which is registered to support a special event and which therefore operates no more than 7 days in any year;
- 5.1.7 Any Local Service which would, other than for its registration under section 6 of the Transport Act 1985, be an excursion or tour within the meaning in section 137(1) of the Transport Act 1985;
- 5.1.8 Any Local Service which is registered to operate less than three journeys in any day or on no more than one day a week;

- 5.1.9 Any Local Service which whilst open to the general public has a start point or destination at a school, and which is predominantly used by students travelling to or from such school;
- 5.1.10 Any Local Service which has been procured by an Authority pursuant to section 63 of the Transport Act 1985 or section 9A of the Transport Act 1968 prior to the date on which this EP Scheme comes into operation as specified in section 4.1;
- 5.1.11 Any Local Service which has been procured by an Authority pursuant to section 63 of the Transport Act 1985 or section 9A of the Transport Act 1968, and where such Authority did not receive a compliant tender (which is deemed to include such tender complying with all requirements specified in this EP Scheme) which offered value for money, in the opinion of that Authority, acting reasonably;
- 5.1.12 Any Local Service where the Operator is paid by a third party (including, but not limited to developers, supermarkets, employers or other parties requiring a bus service to be provided to a location in the EP Scheme area, but for the avoidance of doubt excluding any company which is a parent company or subsidiary of that Operator, or a subsidiary of any parent company of that Operator) in order to provide such service, and such Local Service would not operate in the absence of such payment; and
- 5.1.13 Any Local Service which is operated solely with vehicles having 16 seats or less.

## **6. FACILITIES AND MEASURES**

- 6.1 The Authorities named in column 3 of the table in Schedule 2 (*Facilities and Measures*) shall provide the relevant Facility or Measure described in column 2 by and from the date or dates indicated in column 5 (as applicable).
- 6.2 Where a Required TRO is specified in column 4 of the table in Schedule 2 (*Facilities and Measures*) then the Local Highway Authority (or Local Highway Authorities) for the area to which the TRO applies shall use all reasonable endeavours to make such TRO in sufficient time for the relevant Facility or Measure to be provided no later than the date or dates indicated in column 5. Where a Local Highway Authority is unable to make any required TRO in the timescale specified, then the relevant Local Highway Authority may propose a Proposed Variation which:
- 6.2.1 amends the date or dates indicated in column 5 for such Facility or Measure until a date reasonably following the actual date that the TRO is made ; and
- 6.2.2 amends the date or dates specified for implementation of any requirement that is identified in column 6 of the relevant table as being dependent upon such Facility or Measure,

and where a Proposed Variation specifies both the amendments specified in sections 6.2.1 and 6.2.2 and provided that these are the only amendments specified, then section 8.6.9 shall apply to such Proposed Variation as if it had been discussed by the relevant Local Bus Board(s).

- 6.3 The introduction and/or delivery of the Facilities and Measures set out in this Scheme is subject to the provision of funding, which may be from the Department for Transport or any other funding body. Where an Authority is unable to introduce and/or deliver any Facility or Measure in the timescale specified (including where funding from the Department for Transport or any other funding body which is required to introduce and/or deliver such Facility or Measure has not been provided), then such Authority shall promptly notify the NEJTC, and where the

NEJTC assesses, acting reasonably, that it is not reasonably practicable to introduce and/or deliver such Facility or Measure in the specified timescale under this EP Scheme, the Authorities may propose a Proposed Variation which:

- 6.3.1 amends the date or dates indicated in column 5 for the introduction and/or delivery of such Facility or Measure until a date reasonably following the actual date that the relevant Authority is able to introduce and/or deliver such Facility or Measure,
- 6.3.2 amends the date or dates specified for implementation of any requirement that is identified in column 6 of the relevant table as being dependent upon such Facility or Measure,

and where a Proposed Variation specifies both the amendments specified in sections 6.3.1 and 6.3.2 and provided that these are the only amendments specified, then section 8.6.9 shall apply to such Proposed Variation as if it had been discussed by the relevant Local Bus Board(s).

- 6.4 Where an Authority is unable to introduce and/or deliver any Facility or Measure as envisaged in this EP Scheme (including where funding from Department for Transport or any other funding body which is required to introduce and/or deliver such Facility or Measure has not been provided) and this is demonstrated to the reasonable satisfaction of the NEJTC, then such Authority shall be entitled to introduce and/or deliver that Facility or Measure in such other manner or by such other method as it considers appropriate, acting reasonably, provided that such alternative manner or method of introduction and/or delivery shall deliver benefits equivalent to those that would have been delivered had that Facility or Measure been introduced and/or delivered as envisaged by this EP Scheme, and that Authority may propose a Proposed Variation which:

- 6.4.1 amends the scheme description, Authority responsibilities and whether there are any Required TROs as set out in columns 2-4 (inclusive) of the table in Schedule 2 accordingly,

and provided that these are the only amendments specified, then section 8.6.9 shall apply to such Proposed Variation as if it had been discussed by the relevant Local Bus Board(s).

- 6.5 Where, notwithstanding their obligations pursuant to sections 6.2 or 6.3, or their rights pursuant to section 6.4, an Authority is unable to make a Required TRO or introduce and/or deliver any Facility or Measure within the term of this EP Scheme (including where funding required from the Department for Transport or any other funding body to introduce and/or deliver such Facility or Measure will not be provided within the term of this EP Scheme) and this is demonstrated to the reasonable satisfaction of the NEJTC, then in accordance with section 138E of the Transport Act 2000, this EP Scheme shall be varied to remove the requirement to implement such Required TRO, Facility or Measure and to remove any requirement that is identified in column 6 of the relevant table as being dependent upon such Required TRO, Facility or Measure

## **7. REQUIREMENTS IN RESPECT OF LOCAL SERVICES**

- 7.1 Operators of Local Services identified in column 3 of any table in Schedule 3 (*Requirements in respect of Local Services*) shall ensure that such Local Services meet the relevant requirement set out in column 2 of such table by and from the date or dates specified in column 4.
- 7.2 Where one or more Operators is unable to meet any relevant requirement in the timescales specified in any table in Schedule 3 (*Requirements in respect of Local Services*) they shall promptly notify the NEJTC, specifying the time period in which they can meet the relevant requirement, and setting out any reasons why the standard cannot be met in the specified

timescale. Where the NEJTC assesses, acting reasonably, that it is not reasonably practicable for one or more Operators to meet the relevant standard in the specified timescale under this EP Scheme, the parties agree that one or more Operators may propose a Proposed Variation which:

- 7.2.1 Amends the date or dates indicated in respect of such standard until a date reasonably following the actual date on which the standard can be met by all relevant Operators (or could have been met, had such Operators used reasonable endeavours to achieve the relevant standard); and
- 7.2.2 which also amends the date or dates specified for implementation of any Facility or Measure that is identified in column 5 of the relevant table as being dependent upon such standard,

and where a Proposed Variation specifies both the amendments specified in sections 7.2.1 and 7.2.2 and provided that these are the only amendments specified, then section 8.6.9 shall apply to such Proposed Variation as if it had been discussed by the relevant Local Bus Board(s).

## 8. GOVERNANCE ARRANGEMENTS

### 8.1 North East Regional Bus Partnership Board

8.1.1 A North East Regional Bus Partnership Board (the "**Partnership Board**") shall be formed for the EP Scheme Area and the following will be invited to sit on the Partnership Board:

- 8.1.1.1 an independent chairperson ("**Partnership Chair**"), who shall be agreed in advance of the first meeting of the Partnership Board by the other members of the Partnership Board, and shall not be a representative or employee of such other members of the Partnership Board;
- 8.1.1.2 the managing director of TNE, or the deputy of the managing director in their absence;
- 8.1.1.3 a senior representative of Nexus;
- 8.1.1.4 a Tyne & Wear based officer from the Heads of Transport Highways subgroup;
- 8.1.1.5 a senior representative of Durham and a senior representative of Northumberland;
- 8.1.1.6 a senior representative from:
  - (a) Arriva North East, a trading name of Arriva Northumbria Limited (company number 00237558) and Arriva Durham County Limited (company number 02404350), whose office is at 1 Admiral Way, Doxford International Business, Park, Sunderland, Tyne & Wear, SR3 3XP;
  - (b) Go North East Limited, (company number 02057284), whose registered office is at 3rd Floor, 41-51 Grey Street, Newcastle upon Tyne, NE1 6EE; and

- (c) Stagecoach North East, a trading name of Busways Travel Services Limited (company number 02295227) and Cleveland Transit Limited (company number 02546698), whose office is at One Stockport Exchange, 20 Railway Road, Stockport, United Kingdom, SK1 3SW;
- 8.1.1.7 a local representative of the Confederation of Passenger Transport UK), (company number 1182437), whose office is at 22 Greencoat Place, London, SW1P 1PR, to represent Operators other than those referred to in section 8.1.1.6;
- 8.1.1.8 the chairperson of the Panel; and
- 8.1.1.9 senior representatives from:
  - (a) Bus Users UK, being Bus Users UK Charitable Trust Ltd, a registered charity in England and Wales (number 1178677) and in Scotland (number SC049144), whose office is at 22 Greencoat Place, London, SW1P 1PR; and
  - (b) Transport Focus, the executive non-departmental public body sponsored by the Department for Transport which is the independent watchdog for transport users.
- 8.1.2 Meetings of the Partnership Board shall take place at least quarterly and shall be chaired by the Partnership Chair. The first meeting of the Partnership Board shall take place in [ ***[DN: insert month which is the month before the EP is to commence]***] in advance of the commencement of the EP Scheme in [ ***[DN: insert month that the EP is to commence]***], to support the mobilisation of the EP Scheme.
- 8.1.3 The terms of reference of the Partnership Board shall be developed and agreed by the members of the Partnership Board referred to in section 8.1.1 at the first meeting of the Partnership Board. Functions of the Partnership Board may include:
  - 8.1.3.1 regional level review of performance against the KPIs set out in the EP Plan, and formulation of proposals for targets and action plans to rectify performance issues;
  - 8.1.3.2 consideration of feedback and potential actions from the Panel;
  - 8.1.3.3 review of the EP Plan and contemplation of how funds (when made available) and any savings by Operators reported in accordance with section 8.11 could be used to support delivery of the EP Plan;
  - 8.1.3.4 review and development of regional initiatives to promote bus use including leadership of the positive narrative around bus in the EP Scheme Area;
  - 8.1.3.5 overseeing the annual review and refresh of the BSIP;
  - 8.1.3.6 interaction with stakeholders and Local Bus Boards over issues requiring discussion at a regional level, and consideration of the views of Local Bus Boards in respect of regional issues;
  - 8.1.3.7 review of compliance with the Code of Conduct.

- 8.1.4 The Partnership Board shall provide a forum for discussions in respect of the future content and arrangements for the variation and revocation of this EP Scheme in accordance with section 8.4 where this relates to matters that affect operation of local services across the area of the EP Scheme, or Facilities or Measures which are delivered by the NEJTC, the NECA, the NTCA or Nexus. ***[text to follow which will set out the decision making role of the JTC]***
- 8.2 North East Bus Advisory Panel
- 8.2.1 A North East Bus Advisory Panel (the "**Panel**") shall be formed for the EP Scheme Area comprising:
- 8.2.1.1 an independent chairperson ("**Panel Chair**"), who shall be agreed in advance of the first meeting of the Panel by the Partnership Board, and shall not be a representative or employee of [such other members of the Panel] [any member of the Partnership Board]; and
- 8.2.1.2 representatives of such other groups representative of the EP Scheme Area as an Operator or any Authority may propose, acting reasonably, and which the Panel is reasonably able to accommodate,
- and which shall offer stakeholders in the EP Scheme Area the opportunity to comment on bus services in the EP Scheme Area and the plans of the enhanced partnership.
- 8.2.2 Meetings of the Panel shall take place bi-annually and shall be chaired by the Panel Chair.
- 8.3 Local Bus Boards
- 8.3.1 The Operators and Authorities shall constitute local partnership boards for each Local Authority area within the EP Scheme Area ("**Local Bus Boards**" and each a "**Local Bus Board**"), which shall provide a forum for discussions in respect of the EP Plan and EP Scheme and other matters in relation to bus services at a local level. Each Local Bus Board shall determine:
- 8.3.1.1 any additional attendees of such Local Bus Board;
- 8.3.1.2 the frequency of the meetings of such Local Bus Board; and
- 8.3.1.3 the remit and functions of such Local Bus Board, which may include:
- (a) local review of data provided by the enhanced partnership about performance against the KPIs set out in the EP Plan at a local level, and formulation of local performance targets and action plans to rectify performance issues;
- (b) reviewing compliance by Operators with the Code of Conduct at a local level;
- (c) providing input in accordance with the Code of Conduct;
- (d) development of plans aligned with the EP Plan and BSIP for potential funding (including any savings by Operators reported in accordance with section 8.11);

- (e) considering and discussing issues to be discussed at meetings of the Partnership Board, to enable the relevant NEJTC member to represent the view of the Local Bus Board; and
- (f) liaising with TNE in respect of any support required by that Local Bus Board in relation to tasks including administration, data provision, meeting management

8.3.2 The relevant Local Bus Board(s) shall provide a forum for discussions in respect of the future content and arrangements for the variation and revocation of this EP Scheme in accordance with section 8.4 where this relates to matters that affect operation of local services in the area of a specific Local Bus Board, or Facilities or Measures which are delivered by the Local Authority (or Local Authorities) for the area of that Local Bus Board, including in respect of any relevant savings by Operators reported in accordance with section 8.11. The Local Bus Board(s) will provide comments reflecting local viewpoints to the Partnership Board and/or the NEJTC where required and appropriate.

#### **8.4 Review of this EP Scheme**

8.4.1 This EP Scheme shall be reviewed by the Partnership Board and each Local Bus Board at least annually, in conjunction with review of the EP Plan, commencing no later than on the anniversary of the Commencement Date. The NEJTC shall commence each review, and ensure that such review is carried out in no less than 6 months. The review shall take into account:

- 8.4.1.1 review by each Local Bus Board of matters relating to its area; and
- 8.4.1.2 review by the Partnership Board of performance across the area of the EP Scheme, including consideration of matters reported by each Local Bus Board.
- 8.4.1.3 data on progress towards achieving the KPIs specified in the EP Plan.

8.4.2 The Partnership Board or any Local Bus Board may review specific elements of this EP Scheme on an ad-hoc basis. Partnership Board or Local Bus Board members and any other Operator of Local Services should contact the NEJTC using the following email address [buses@transportnortheast.gov.uk](mailto:buses@transportnortheast.gov.uk) explaining what the issue is and its urgency. The NEJTC will then decide whether to table the matter at the next scheduled meeting of the Partnership Board and/or the relevant Local Bus Board or Local Bus Boards to which the matter relates or make arrangements for a more urgent meeting of the Partnership Board or the relevant Local Bus Board or Local Bus Boards, where the matter requires resolution in advance of the next scheduled meeting.

#### **8.5 Postponement of operation of requirements of this EP Scheme**

For the avoidance of doubt, where it appears to the NEJTC that (or where they are notified by any Local Authority, Nexus or any Operator that) any of the dates specified in section 138I(3)(b) to (e) of the Transport Act 2000 should be postponed, then section 138I of the Transport Act 2000 may apply in respect of such postponement, but those dates may also be amended in accordance with section 8.6.

## 8.6 Arrangements for Varying or Revoking this EP Scheme

- 8.6.1 In accordance with section 138E of the Transport Act 2000, the procedure in this section 8.6 shall apply in place of the provisions of section 138L to 138N of the Transport Act 2000, in order to vary this EP Scheme.
- 8.6.2 Consideration will be given to any proposed variations to this EP Scheme ("**Proposed Variation**") which are raised by the NEJTC, Nexus, a Local Authority, an Operator or one of the organisations represented on a Local Bus Board ("**Proposer**"):
- 8.6.3 In proposing a Proposed Variation, the Proposer shall, so far as reasonably practicable:
- 8.6.3.1 demonstrate how the Proposed Variation would contribute to achieving one or more of the objectives set out in the BSIP, EP Plan and/or other current local transport policies;
  - 8.6.3.2 identify the Local Services and areas which will be affected by the Proposed Variation, including the requirements which will be imposed on Operators in respect of such Local Services, and the changes required to Schedule 3 of this EP Scheme and any description of the proposed standards which should be included in the Appendix to Schedule 3;
  - 8.6.3.3 identify any Facilities or Measures which are to be implemented as part of the Proposed Variation or any modifications or amendments to existing Facilities or Measures within the EP Scheme including proposed dates for implementation, the proposed Authority which is to implement any such Facility or Measure and the sources and availability of funding required to deliver such Facility or Measure (including any savings by Operators reported in accordance with section 8.11 which may be utilised), and any other information required to include such Facility or Measure in Schedule 2, including any description of the proposed Facilities or Measures to be included in the Appendix to Schedule 2;
  - 8.6.3.4 identify any significant adverse effect on competition of the Proposed Variation, and where any such adverse effect is possible, identify whether such Proposed Variation has a view to achieving one or more of the purposes specified in paragraph 2(3) of Schedule 10 of the Transport Act 2000 and consider whether the effect on competition is likely to be proportionate to the achievement of those purposes; and
  - 8.6.3.5 identify the Authorities and Operators which may have an interest in or be affected by the Proposed Variation and each Local Bus Board to which the Proposed Variation may therefore be relevant.
- 8.6.4 Any request for a Proposed Variation shall be in writing and submitted to buses@transportnortheast.gov.uk. The NEJTC will forward all requests received on to all members of the relevant Local Bus Boards within 5 working days of receipt.

- 8.6.5 On receipt of a request for a Proposed Variation the NEJTC will convene each relevant Local Bus Board giving at least 14 days' notice for the meeting, to discuss the Proposed Variation.
- 8.6.6 If the Proposed Variation is agreed by all Qualifying Operators affected by it, and if the NEJTC and each Authority who is affected by the Proposed Variation also agrees (having discussed and agreed this in accordance with the governance procedures of the NEJTC and each relevant Authority, as applicable, in advance of the meeting of the Local Bus Board), then subject to section 9.2, the Proposed Variation shall be referred to the NEJTC and each Authority affected by the Proposed Variation for approval in accordance with section 8.6.9.
- 8.6.7 If there is not full agreement by all Qualifying Operators affected by the Proposed Variation, but the NEJTC and each Authority affected by the Proposed Variation have agreed to the Proposed Variation in accordance with section 8.6.6 then the Proposed Variation may be put to the operator objection mechanism as set out in The Enhanced Partnership Plans and Schemes (Objections) Regulations 2018, as if the Proposed Variation was a variation to this EP Scheme notified under section 138L of the Transport Act 2000 save that:
- 8.6.7.1 a reduced objection period of 14 days shall apply in place of the 28 day period stated in section 138L(2)(c) of the Transport Act 2000;
- 8.6.7.2 references to "the area to which the scheme relates" in section 138L(5)(b) of the Transport Act 2000 shall be taken to be references to the areas of the relevant Local Bus Boards to which the Proposed Variation relates.
- 8.6.8 If objections under the operator objection mechanism implemented pursuant to section 8.6.7 do not reach the statutory objection limits, then subject to section 9.2, the Proposed Variation shall be referred to the NEJTC and each Authority affected by the Proposed Variation for approval in accordance with section 8.4.9.
- 8.6.9 Following any discussion by a Local Bus Board pursuant to sections 8.6.6 or 8.6.7 in respect of a Proposed Variation, the NEJTC and any Authority affected by the Proposed Variation shall be entitled to promptly confirm agreement to that Proposed Variation following a formal decision by such Authority to the Proposed Variation, and within seven working days of the final approval of NEJTC or any relevant Authority the NEJTC shall publish the revised EP Scheme on its website on behalf of the Authorities.

## **8.7 Revocation of an EP Scheme**

- 8.7.1 An EP Scheme can only exist if an EP Plan is in place and an EP Plan requires at least one EP Scheme to be in place, therefore:
- 8.7.1.1 if the North East Enhanced Partnership Plan is revoked then this will automatically lead to this EP Scheme ceasing; and
- 8.7.1.2 if this EP Scheme is revoked then unless another EP Scheme is in place in the area of the North East Enhanced Partnership Plan, the North East Enhanced Partnership Plan will cease.
- 8.7.2 If any Authority or Operator of Local Services believes it is necessary to revoke this EP Scheme, then in accordance with section 138E of the Transport Act 2000,

the procedure at section 8.6 shall apply to revocation in place of the provisions of section 138O of the Transport Act 2000 to revoke the EP Scheme, on the basis that the Proposed Variation will be revocation of this EP Scheme, and such Proposed Variation will therefore be relevant to all Authorities and Operators.

## **8.8 Franchising Scheme**

If at any point in the future, any area covered by this EP Scheme is included in a bus franchising scheme, the relevant requirements set out in this EP Scheme document will cease to apply to areas covered by the franchising scheme, in line with the arrangements set out in the franchising scheme.

## **8.9 Funding of Network Improvements**

8.9.1 Where for the purposes of implementation of any Proposed Variation made pursuant to this section 8 one or more Local Transport Authority would be required to subsidise the provision of all or part of a Local Service, the Local Transport Authorities shall comply with their duties under section 88(2) Transport Act 1985 to, in exercising and performing their functions with respect to securing the provision of public passenger transport services to co-operate with one another so as to secure, in the interests of the ratepayers in their areas, the best value for money from their expenditure on public passenger transport services, taken as a whole, which may include consideration of:

8.9.1.1 which Local Transport Authority is able to secure the best value for money for any services which operate across the boundary between the two authorities, taking into account the powers available to each respective authority to tender or otherwise award contracts for such services;

8.9.1.2 other funding sources available to each such Local Transport Authority that may be utilised to fund those, or other local services, or otherwise reduce the overall cost of provision of such services,

and references to a Local Transport Authority in this section 8.9.1 shall be taken to include Durham, Nexus (and/or the Tyne and Wear Sub Committee acting on behalf of the NEJTC) and/or Northumberland, where Durham, Nexus (and/or the Tyne and Wear Sub Committee acting on behalf of the NEJTC) and/or Northumberland are exercising the functions of a local transport authority in relation to subsidising the provision of all or part of a Local Service.

8.9.2 Where any Proposed Variation requires the subsidy of one or more (or part of one or more) Local Service in order to be implemented, the NEJTC may require that they are provided with details of which party shall procure such Local Service, the subsidy available, and the legal basis upon which such Local Service shall be procured, prior to forwarding such request in accordance with paragraph 8.6.4.

## **8.10 Complementary Arrangements**

Where for the purposes of implementation of any Proposed Variation made pursuant to this section 8 one or more Local Transport Authority would be required to:

8.10.1 implement additional statutory schemes (including, but not limited to, advanced quality partnership schemes, or advanced ticketing schemes);

- 8.10.2 enter into agreements with one or more Operators (whether a voluntary partnership agreement or otherwise); or
- 8.10.3 certify any qualifying agreement between Operators,

then where it is agreed that such Proposed Variation shall be implemented the relevant authority shall use reasonable endeavours to implement such scheme(s) and/or agreement(s) provided that nothing in this EP Scheme shall be taken to reduce or remove any requirement that might apply to such authority in respect of implementation of such scheme or agreement pursuant to the Transport Act 2000 or otherwise, including, but not limited to the requirement for such authority to apply the relevant competition test pursuant to Schedule 10 to the Transport Act 2000.

## 8.11 Reporting of Operator Savings Derived from EP Scheme

8.11.1 Each Operator shall report savings it has made to TNE on an annual basis for the purposes of complying with the requirement set out at reference OPR01 in the table in paragraph 1.3 (*General*) of Schedule 3 (*Requirements in respect of Local Services*), and such savings to be reported shall include but not be limited to:

- 8.11.1.1 cash savings made by that Operator;
- 8.11.1.2 savings made by that Operator which relate to assets and/or resources available to that Operator and/or which no longer need to be utilised by that Operator as a result of the implementation of Facilities and/or Measures in accordance with Schedule 2 (*Facilities and Measures*) of this EP Scheme, and/or requirements imposed on Operators in accordance with Schedule 3 (*Requirements in respect of Local Services*) of this EP Scheme; and/or
- 8.11.1.3 other operational expenditure in respect of Local Services operating in the EP Scheme Area which that Operator no longer needs to expend,

which are, in each case, derived directly from this EP Scheme.

## 8.12 Intention of Governance Arrangements

8.12.1 The governance arrangements set out in this section 8 are intended to enable the implementation of the EP Plan, which may include:

- 8.12.1.1 variations to this EP Scheme, either in accordance with the provisions of section 138K to 138N of the Transport Act 2000 or the process set out in section 8.6 of this EP Scheme; or
- 8.12.1.2 implementation through other means, including those set out in section 8.10.

## 9. Competition

9.1 The EP Plan and the EP Scheme have been developed with all operators of Local Services, and the EP Scheme does not have and is not likely to have a significantly adverse effect on competition. The competition test set out in Part 1 of Schedule 10 to the Transport Act 2000 has been applied and it is concluded that, at this point, there will be no significantly adverse effect on competition arising from the EP Plan or the EP Scheme.

- 9.2 Where a Proposed Variation is to be effected to this EP Scheme in accordance with section 8 the NEJTC shall apply the competition test set out in Part 1 of Schedule 10 to the Transport Act 2000 on behalf of NECA and NTCA and the Proposed Variation to the EP Scheme shall not be made if the NEJTC is unable to conclude either:
- 9.2.1 that the making of the Proposed Variation will not have or be likely to have a significantly adverse effect on competition; or
  - 9.2.2 that the making of the Proposed Variation is justified by paragraph 2(2) of Part 1 of Schedule 10 to the Transport Act 2000.

**SCHEDULE 1: EP PLAN AND EP SCHEME AREA**



**SCHEDULE 2: FACILITIES AND MEASURES**

[DN: Dates below in this Schedule 2 and Schedule 3 to be reviewed and updated by TNE as required.]

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
ITS01a  Delivering traffic signal upgrades at junctions and pedestrian crossings, in order that full traffic control interventions can be enabled remotely. Focused on an initial six corridors with potential to scale up or down with more funding:	<b>A167 Corridor:</b> – Intelligent Transport Systems (ITS) investment to improve the reliability and punctuality of bus services in the region and reliable real time information. This project will be managed in two phases.	Tyne and Wear Regional Traffic Signals Service, Newcastle, Gateshead and Durham Local Authorities will deliver major works along this corridor including full junction renewals with conversion to Extra Low Voltage (ELV) signals (Siemens Plus+), replacement of existing signal poles with passively safe aluminium columns, the provision of 4/5G Urban Traffic Control (UTC) communications and Automatic Number Plate Recognition (ANPR) / CCTV connected to the Urban Traffic Management Centre (UTMC).	No	Within [ ] [days/weeks/months] of the Scheme Commencement Date		N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
		Minor works will also be delivered for sites that are already operating ELV and just require an upgrade to provide 4/5G communications to facilitate control via UTC and the addition of ANPR / CCTV cameras.				

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
	<b>Coast Road (A1058) Corridor:</b> ITS Investment	Tyne and Wear Regional Traffic Signals Service, Newcastle and North Tyneside Local Authorities will deliver major works along this corridor including full junction renewals with conversion to Extra Low Voltage (ELV) signals (Siemens Plus+), replacement of existing signal poles with passively safe aluminium columns, the provision of 4/5G Urban Traffic Control (UTC) communications and Automatic Number Plate Recognition (ANPR) / CCTV connected to the Urban Traffic Management Centre (UTMC).	No	Within [ ] [days/weeks/months] of the Scheme Commencement Date		N/A
	<b>West Newcastle:</b> ITS Investment	Tyne and Wear Regional Traffic Signals Service and Newcastle Local Authority will deliver major works along this corridor including full junction renewals with conversion	No	Within [ ] [days/weeks/months] of the Scheme Commencement Date		N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
		<p>to Extra Low Voltage (ELV) signals (Siemens Plus+), replacement of existing signal poles with passively safe aluminium columns, the provision of 4/5G Urban Traffic Control (UTC) communications and Automatic Number Plate Recognition (ANPR) / CCTV connected to the Urban Traffic Management Centre (UTMC).</p> <p>Minor works will also be delivered for sites that are already operating ELV and just require an upgrade to provide 4/5G communications to facilitate control via UTC and the addition of ANPR / CCTV cameras</p>				
	<b>Great North Road:</b> ITS Investment	Tyne and Wear Regional Traffic Signals Service, Newcastle and North Tyneside Local Authority will deliver major works	No	Within [ ] [days/weeks/months] of the Scheme Commencement Date		N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
		<p>along this corridor including full junction renewals with conversion to Extra Low Voltage (ELV) signals (Siemens Plus+), replacement of existing signal poles with passively safe aluminium columns, the provision of 4/5G Urban Traffic Control (UTC) communications and Automatic Number Plate Recognition (ANPR) / CCTV connected to the Urban Traffic Management Centre (UTMC).</p> <p>Minor works will also be delivered for sites that are already operating ELV and just require an upgrade to provide 4/5G communications to facilitate control via UTC and the addition of ANPR / CCTV cameras.</p>				
	<b>South Shields to Newcastle:</b>	Tyne and Wear Regional Traffic Signals Service,	Yes – required for Bus Lane to	Within [ ] [days/weeks/months]		N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
	ITS Investment	<p>Newcastle, South Tyneside and Gateshead Local Authority will deliver major works along this corridor including full junction renewals with conversion to Extra Low Voltage (ELV) signals (Siemens Plus+), replacement of existing signal poles with passively safe aluminium columns, the provision of 4/5G Urban Traffic Control (UTC) communications and Automatic Number Plate Recognition (ANPR) / CCTV connected to the Urban Traffic Management Centre (UTMC).</p> <p>Minor works will also be delivered for sites that are already operating ELV and just require an upgrade to provide 4/5G communications to facilitate control via UTC</p>	form part of scheme.	of the Scheme Commencement Date		

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
	<p><b>A183 Corridor:</b> ITS Investment</p>	<p>and the addition of ANPR / CCTV cameras.</p> <p>Tyne and Wear Regional Traffic Signals Service and Sunderland will deliver major works along this corridor including full junction renewals with conversion to Extra Low Voltage (ELV) signals (Siemens Plus+), replacement of existing signal poles with passively safe aluminium columns, the provision of 4/5G Urban Traffic Control (UTC) communications and Automatic Number Plate Recognition (ANPR) / CCTV connected to the Urban Traffic Management Centre (UTMC).</p> <p>Minor works will also be delivered for sites that are already operating ELV and just require an upgrade to provide 4/5G communications to</p>	No	Within [ ] [days/weeks/months] of the Scheme Commencement Date		N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
		facilitate control via UTC and the addition of ANPR / CCTV cameras.				
ITS01b	Delivering enhanced real time information enabling buses to be accurately located in real-time and ensure they benefit fully from hurry calls at signalised junctions. Systems will be deployed nationwide on all buses with the hurry call detection enabled on the routes where ITS01b has been deployed.	<p>Back office systems to be hosted within Nexus and the region's UTMC.</p> <p>Back office systems to utilise information supplied by Operators to an accuracy level which corresponds to the accuracy of the data received into the system.</p> <p>User requirements are being defined through a Business Case and a bespoke system is intended to be delivered through an Innovation Partnership.</p>	No	Within [ ] [days/weeks/months] of the Scheme Commencement Date		[Provision by Operators of [system] / [data] referred to at reference [OP03] in the table in paragraph 1.1 of Schedule 3 <b>[DN: To be confirmed]</b> ]
<b>L01</b>	Information Provision:  Provision and maintenance of printed information at existing stops throughout the network.	Durham will when replacing bus stop liners replace them with new bus stop liners which adhere to the policy specified as applicable to Durham in the section headed Bus	N/A	Within [ ] [days/weeks/months] of the Scheme Commencement Date		N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
	The format of timetable information will become consistent across the region where this improves information.	<p>stop timetable displays in Part b of Appendix 1.</p> <p>Northumberland will when replacing bus stop liners replace them with new bus stop liners which adhere to the policy specified as applicable to Northumberland in the section headed Bus stop timetable displays in Part b of Appendix 1.</p> <p>Nexus will when replacing bus stop liners replace them with new bus stop liners which adhere to the policy specified as applicable to Nexus in the section headed Bus stop timetable displays in Part b of Appendix 1.</p>				
<b>L02</b>	<b>Multimodal Information Provision and Digital Information Provision:</b>	Durham to provide information standards as set out in the section headed Information at Interchanges in part b of Appendix 1 at the interchanges listed in	N/A	Within [ ] [days/weeks/months] of the Scheme Commencement Date		N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
	<p>Information pertaining to intermodal travel will be provided at interchanges (bus, Metro and rail) across the region in order to better facilitate passenger transitions from one mode of travel to another.</p> <p>Wayfinding in major bus stations and interchanges will be supported by measures including 'where to catch your bus' posters.</p>	<p>respect of Durham at part a of Appendix 1</p> <p>Nexus to provide information standards as set out in the section headed Information at Interchanges in part b of Appendix 1 at the interchanges listed in respect of Nexus at part a of Appendix 1</p> <p>Northumberland to provide information standards as set out in the section headed Information at Interchanges in part b of Appendix 1 at the interchanges listed in respect of Northumberland at part a of Appendix 1</p> <p>In each case where an identified interchange is not managed by the relevant Authority, that Authority shall only be required to use reasonable</p>				

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
		endeavours to provide such information.				
L03	<p><b>Customer Support Staff:</b></p> <p>Staff at key interchanges in Tyne and Wear will be available to support customers.</p> <p>Ambassadors will help with guiding passengers and supporting them in making travel choices.</p>	<p>Durham will provide the staff specified in the section headed staff in part b of Appendix 1 at the interchanges listed in respect of Durham at part a of Appendix 1</p> <p>Nexus will provide the staff specified in the section headed staff in part b of Appendix 1 at the interchanges listed in respect of Nexus at part a of Appendix 1</p>	N/A	Within [ ] [days/weeks/months] of the Scheme Commencement Date		N/A
L04	<p><b>Core Network Mapping:</b></p> <p>Printed information will be available on our core network (subject to BSIP funding) to facilitate better understanding of the wider regional bus network.</p>	<p>Subject to BSIP funding, printed information, set out in the section headed Printed Information on Core Network in part b of Appendix 1, will be available on the core network in Durham.</p>	N/A	Within [ ] [days/weeks/months] of the Scheme Commencement Date		N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
L05	<p><b>Printable information:</b></p> <p>Printable information will be available online for the whole network.</p>	Durham, Northumberland and Nexus shall provide the relevant timetable and network information online.		Within [ ] [days/weeks/months] of the Scheme Commencement Date		
L06	<p><b>Logo:</b></p> <p>We will develop a consistent logo that will become a recognisable symbol of public transport in the North East</p>	Authorities and Operators will take an active role in the development and consultation for a new logo which will be facilitated by NEJTC.	N/A	Within [ ] [days/weeks/months] of the Scheme Commencement Date		N/A
L07	<p><b>Website:</b></p> <p>Network wide ticketing and journey planning will be made available to passengers through a single dedicated website under the as yet to be decided regional bus transport brand</p>	Authorities and Operators will take an active role in the development and consultation for a new website which will be facilitated by NEJTC.	N/A	Within [ ] [days/weeks/months] of the Scheme Commencement Date		N/A
L08	<p>Bus Passenger Charter:</p> <p>NEJTC have provided an indicative Bus Passenger Charter in</p>	NECA and NTCA will develop and write a passenger charter in consultation with all Authorities and Operators.	N/A	Within [ ] [days/weeks/months] of the Scheme Commencement Date		N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
	<p>Appendix A of the BSIP, which will be developed through consultation with Authorities and Operators.</p> <p>The Charter will hold all signees to account regarding regional bus transport services.</p>					
L09	TNE Costs: Funding of costs in respect of additional staff and technical capabilities required	TNE will spend a minimum of £400,250.00 in each financial year of this EP Scheme on additional staffing and technical capabilities to manage and monitor the Enhanced Partnership (including any money spent for these purposes in the financial year prior to the Scheme Commencement Date), provided that where TNE has not spent all of such amount within a financial year, any amount which remains unspent at the end of that financial year will	No	From the Scheme Commencement Date		N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
		roll over into the following financial year, provided that TNE shall have spent a minimum of £1,200,750.00 during the period of this EP Scheme.				
L10	Additional staff interchanges – Provide additional staff, turnaround cleaners and customer support staff at identified interchanges	TNE will work with Durham and Nexus to determine the most appropriate employment option for additional staff members, once this has been determined staff will be employed.	No	Within [ ] [days/weeks/months] of the Scheme Commencement Date		
L11	Community bus partnerships	Nexus, Durham and Northumberland will employ staff to act as bus champions for their areas, they will work with local communities to promote bus use.	No	Within [ ] [days/weeks/months] of the Scheme Commencement Date		

1		2	3	4	5	6	7
Reference		Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
ATNE01	<i>Information to follow</i>  Delivering bus priority measures along the corridors identified in the Bus Service Improvement Plan:	<i>Information to follow</i>	<i>Information to follow</i>	<i>Information to follow</i>	<i>Information to follow</i>	<i>Information to follow</i>	<i>Information to follow</i>
ATNE02	Tranche 2 Bus Priority	<i>Information to follow</i>	<i>Information to follow</i>	<i>Information to follow</i>	<i>Information to follow</i>	<i>Information to follow</i>	<i>Information to follow</i>

1		2	3	4	5	6	7
Reference		Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
Delivering bus priority measures as promoted by local authority colleagues in the Bus Service Improvement Plan:	<b>Infrastructure Schemes</b>						
<b>ATNE03</b>		Safe and Accessible infrastructure - Updates and where necessary renewals of waiting infrastructure which does not meet current accessibility and safety standards, and which, as a consequence is a barrier to patronage.	TNE will work with Local Authorities and Nexus to produce a programme of stops and stations which do not meet current safety and accessibility standards. Appropriate interventions for each location will then be developed. Delivery of interventions is subject to final design, consultation outcomes and business case appraisal.	No	Within [ ] [days/weeks/months] of the Scheme Commencement Date		
<b>ATNE04</b>		Maintenance of existing bus facilities	The Local Highway Authority named in the second column of the table in Annex 3 to this Schedule shall maintain the facilities provided pursuant to the	No further TROs	From the Scheme Commencement Date		

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
		TRO detailed in the third column				
ATNE05	Reinvestment in the EP Scheme Area of Operator savings derived directly from this EP Scheme.	Authorities shall work together to consider and determine how savings made by Operators which are derived directly from this EP Scheme and reported by Operators in accordance with the requirement set out at reference OPR01 in the table in paragraph 1.3 of Schedule 3 shall be reinvested in the EP Scheme Area, taking into account the existing priorities of those Authorities, and thereafter Authorities shall utilise the governance arrangements set out in section 8 of this EP Scheme as required in order to implement such reinvestment.	No	From the Scheme Commencement Date		<p>(1) Annual reporting by Operators to TNE of savings derived directly from this EP Scheme in accordance with section 8.11 of this EP Scheme; and</p> <p>(2) implementation of reinvestment of Operator savings by Operators as directed and required by Authorities and/or TNE,</p> <p>each as referred to at reference OPR01 in the table in paragraph 1.3 of Schedule 3.</p>

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
<b>P&amp;R01</b>	P&R - Major Park and Ride site(s) from a shortlist of proposals, selected subject to business case appraisal.	TNE will commission a study to determine the optimal park & ride site in the region, development work will then commence with the relevant Local Authority/Authorities to produce a detailed design work and delivery, this is subject to planning applications, land consents, consultation outcomes and business case appraisal. Bus service provision will be dependent on final site selection.	No	Within [ ] [days/weeks/months] of the Scheme Commencement Date		N/A
<b>P&amp;R02</b>	Pocket P&R - Proposed package of strategically placed, micro Park and Ride sites to make it easier for people to join the bus network. Sites will be identified by Local Authorities in both suburban and rural areas.	TNE will work with all Local Authorities to identify sites that are suitable for pocket P&R and determine appropriate interventions for each site. Delivery of interventions is subject to final design, planning applications or other land consents which may be required and	No	Within [ ] [days/weeks/months] of the Scheme Commencement Date		

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
		consultation outcomes and business case appraisal.				
F&T01	<p>Ticketing Products:</p> <p>(1) Development by Authorities of a reimbursement scheme and any other schemes required which shall apply in respect of the ticketing products set out in Annex 2 of this Schedule 2; and</p> <p>(2) Following development of the reimbursement scheme and any other schemes required as referred to in paragraph (1) above, Authorities shall provide such reimbursement scheme and any other such schemes required.</p>	<p>Authorities shall work together and engage with Operators in the development of a reimbursement scheme and any other schemes required which shall apply in respect of the ticketing products set out in Annex 2 of this Schedule 2.</p> <p>Following development of the reimbursement scheme and any other schemes required as referred to above, provision by [Authorities] of such reimbursement scheme and any other such schemes required.</p>	No	Within [ ] [days/weeks/months] of the Scheme Commencement Date		<p>(1) Co-operation by Operators as reasonably requested by any Authority in relation to the development of a reimbursement scheme and any other schemes required which shall apply in respect of the ticketing products set out in Annex 2 of this Schedule 2; and</p> <p>(2) Following development of the reimbursement scheme and any other schemes required as referred to in this F&amp;T01, provision by Operators of the ticketing products</p>

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
						referred to in Annex 1 of this Schedule 2, each as referred to at reference OPT02 in the table in paragraph 1.2 of Schedule 3.
<b>F&amp;T02</b>	Care Experienced tickets - Provide a smart annual season ticket for young adults up to the age of 25 who have left the care system.	TNE will facilitate the bulk purchase of season tickets for distribution via the Local Authorities to the eligible individuals.	No	Within [ ] [days/weeks/months] of the Scheme Commencement Date		
<b>F&amp;T03</b>	Smart ticket capping - Pay-As-You-Go system with a daily cap when a passenger uses a Pop smart card based of multi-modal day ticket prices.	TNE will work with Nexus and Operators to provide the back office system required to allow for smart ticket capping, subject to technical specification being agreed and solution being deliverable.	No	Within [ ] [days/weeks/months] of the Scheme Commencement Date		
<b>Serv01</b>	LTA secured services budgets	Northumberland, Durham and Nexus will aim to maintain the secured bus service and concessionary travel budgets for the duration of the EP.	No	Within [ ] [days/weeks/months] of the Scheme Commencement Date		N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
Serv02	Bus service improvements	Northumberland, Durham and Nexus will look to introduce service improvements and enrich the network where there is demand and/or there is limited access to bus services.	No	Within [ ] [days/weeks/months] of the Scheme Commencement Date		
Serv03	New bus services	Northumberland, Durham and Nexus will look to introduce new bus services where there are currently no bus services and a potential market exists, for example to tourist sites.	No	Within [ ] [days/weeks/months] of the Scheme Commencement Date		
Serv04	DRT service(s)	TNE will work with Northumberland, Durham and Nexus to develop and deliver a DRT service(s) in the region subject to final business case appraisal.	No	Within [ ] [days/weeks/months] of the Scheme Commencement Date		
Serv05	Code of Conduct – consultation over service changes:  NEJTC have provided an indicative Code of Conduct in Annex 1 of this Schedule 2, which	NECA and NTCA will develop the Code of Conduct in consultation with all Authorities and Operators.	No	Within [ ] [days/weeks/months] of the Scheme Commencement Date		N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which facility or measure is to be provided	Date from which work on the facility or measure is to be delivered by	Dependency
	<p>will be developed through consultation with Authorities and Operators.</p> <p>The Code of Conduct will set out a management process for making changes to or on the bus network.</p>					

**APPENDIX 1: APPENDIX: DETAILS OF FACILITIES OR MEASURES****Part a: Interchanges****County Durham:**

<b>Interchanges</b>	<b>"Key" interchanges</b>
Durham City Bus Station	Durham City Bus Station
Consett Bus Station	
Stanley Bus Station	
Peterlee Bus Station	
Bishop Auckland Bus Station	
Chester-le-Street	
Ferryhill	
Crook	
Barnard Castle	
Seaham	
Newton Aycliffe	
Spennymoor	

**Nexus:**

<b>Interchanges</b>	<b>"Key" interchanges</b>
Regent Centre	Eldon Square
Four Lane Ends	Haymarket
Northumberland Park	Four Lane Ends
North Shields	Gateshead
Wallsend	Park Lane
Monument	South Shields
Haymarket	
Gateshead	

Jarrow	
South Shields	
Park Lane	
Central Station, Newcastle	
Heworth	
Eldon Square	
Fawcett Street / Sunderland Station, Sunderland	

**Northumberland:**

<b>Interchanges</b>	<b>"Key" interchanges</b>
Blyth	
Hexham	
Morpeth	
Ashington	
Alnwick	
Berwick	

**Part b: Information and staff provision****Staff:**

<b>Authority</b>	<b>Details of staff provided</b>
County Durham	<ul style="list-style-type: none"> <li>Facilities management staff for cleaning toilets, passenger concourse etc. at main bus stations (Durham, Consett, Stanley and Peterlee)</li> <li>New Durham bus station will have customer facing staff in core hours on completion of rebuilding (due 2023)</li> </ul>
Nexus	A team of 5 staff who operate north of the River Tyne and 5 staff south of the river. Both teams are managed by a customer service manager
Northumberland	n/a

**Bus stop timetable displays:**

<b>Authority</b>	<b>Details of information displayed</b>
County Durham	<ul style="list-style-type: none"> <li>Trapeze Novus X software is used to automatically generate all timetable displays for any given change date</li> <li>One of several layouts is used depending on the space available on the page</li> <li>Bus stops that have a future timetable change are automatically identified and the most appropriate layout is chosen</li> <li>Displays are grouped into pre-defined areas for printing and distribution</li> <li>Efficient system that allows displays to be updated by the change date with minimal staff resource</li> <li>Modified 'where to board' layout is used for large format static electronic passenger display screens</li> <li>Durham CC policy is to replace every printed timetable display within 7 days and before any bus service change date.</li> <li>Timetable displays at bus stops and bus stations are managed by Durham County Council</li> <li>Real Time Passenger Information (RTPI) is available at 150 bus stops across County Durham</li> <li>RTPI displays at main bus stations (Durham, Consett, Stanley and Peterlee) show next bus departures at head of stand and summary of services</li> </ul>

Authority	Details of information displayed
	<ul style="list-style-type: none"> <li>• RTPI displays at other principal bus stops show next bus departures</li> </ul>
Nexus	<ul style="list-style-type: none"> <li>• Timetables at bus stops and stations are managed by Nexus</li> <li>• Each stop has its own customised timetable</li> <li>• They are frequently updated as alterations to timetables are made</li> <li>• Real time information is available at approximately 66 bus stops across Tyne and Wear (220 including stops within bus stations)</li> <li>• Bus operators provide Nexus with vehicle location data in the form of SIRI, which is then used by a prediction engine to produce an estimated time of arrival (ETA)</li> <li>• Efficient system that allows displays to be updated by the change date with minimal staff resource</li> <li>• As Nexus and operators use different prediction methods, there can be slight discrepancies in the final ETA</li> </ul>
Northumberland	<ul style="list-style-type: none"> <li>• Northumberland procure their bus stop liners on a contractual basis from Nexus</li> </ul>

#### Information at interchanges:

Authority	Details of information provided
County Durham	<ul style="list-style-type: none"> <li>• Large format (55") static electronic displays show 'where to board your bus' information. This is a basic webpage updated with current data as required</li> <li>• Printed 'where to board your bus' displays are provided and maintained at all bus stations</li> <li>• Large format (55") interactive electronic displays are available at Durham Railway Station and Durham Bus Station for journey planning and onward rail travel information</li> <li>• Other information includes: notices, advertisements, service disruption and holiday service information</li> </ul>
Nexus	<ul style="list-style-type: none"> <li>• Bus interchanges and Metro stations are fitted with PID's providing a live feed of departures</li> <li>• Nexus provides 'Where to catch your bus' information posters at interchanges</li> </ul>
Northumberland	n/a

**Printed information on core network:**

<b>Authority</b>	<b>Details of information provided</b>
County Durham	<ul style="list-style-type: none"> <li>• Printed timetable display at every bus stop</li> <li>• Large format poster in Adshell shelters</li> <li>• Smaller Bissel standard case on posts at other stops</li> <li>• A County Durham bus map is published which includes surrounding cross-boundary services</li> <li>• Shape files for bus routes are updated as part of the existing County Durham interactive bus map</li> </ul>
Nexus	Printed timetable display at every bus stop
Northumberland	

## ANNEX 1: INDICATIVE CODE OF CONDUCT

### **Code of Conduct – Management process for making changes to or on the bus network**

As is the case at present, planned network changes by Operators will be implemented at fixed dates in the year in order to retain customer confidence, limit pressure on publicity functions and assist contract management. It is acknowledged that flexibility will be required to respond to circumstances where there is seasonal demand or where there are reliability concerns. Under certain situations it may also be agreed that an Operator does not need to give advanced notice of changes, beyond the statutory requirement to notify the traffic commissioner. This may be when a change will be beneficial to the bus network, or when all members of the bus partnership agree that a change is either immaterial or pre-agreed by the partnership.

Authorities may also choose not to raise changes with Local Bus Boards, if the relevant Authority consider changes to be so minor that the impact on passengers will be negligible.

- T-18 weeks (minimum) – An Operator determines the need to make a network change and submits plans to the appropriate Local Authority or Authorities, including Transport North East and Nexus. The relevant Local Bus Board or Boards are also identified so that changes can be communicated to elected members via correspondence. Such a submission should include a short brief on the reasons for the change, including data if relevant and not commercially sensitive, demonstrating how the change or changes would impact the objectives set out in the Bus Service Improvement Plan (BSIP), Enhanced Partnership (EP) Plan and/or other current local transport policies. Where impacts are potentially or actually detrimental Operators ought to detail methods of mitigation. On receipt the Local Bus Board Chair shall consider if the change(s) merits raising with the wider Local Bus Board. Any data requests from Operators to be requested at this point.
- T-15 weeks – High-level feedback on proposals to be sent to Operators from LTAs.
- T-13 weeks – Plans, having taken into account where possible initial feedback from Local Bus Boards and elected members, are ready for consultation.
- T-13 weeks – Authorities and / or Operators undertake appropriate measures to publicise draft changes to routes and service levels, as well as how feedback can be provided, via social media (push adverts if funding allows), websites and digital information boards at bus stops, in bus stations and on-board buses, where available and appropriate. Engagement to be held with key stakeholder bodies such as Parish Councils and the general public via “drop in” sessions as appropriate.
- T-11 weeks – Local Bus Board Chair to consider if a meeting is required, if so Local Bus Board meeting is held to review feedback and discuss with Operators if any amendments to the proposed changes can be taken. 11-week period is used to make any final amendments to aforementioned changes.
- T-6 weeks – Services registered and 6-week period is used to promote network changes. Promotion to be undertaken by Operators and Local Authorities including

social media, websites, apps, and digital information displays at bus stations, bus stops and on-board buses where available and appropriate.

- T-6 weeks – A Partnership Board meeting is held for an overview if changes are region wide or beyond the jurisdiction of Local Bus Boards i.e. three or more areas.
- T-6 weeks – Traffic commissioner notified, unless all partners agree that a short-term notice will be acceptable. This may be when a change will be immaterial to bus users, offer an increased service or respond to short term events such as reliability challenges.
- T-4 weeks – Operators and Authorities begin to update and go live with customer information where applicable.
- T-2 weeks\* – Revised bus service data (timetables/routes) to be updated for journey planning and real time passenger information systems. Roadside publicity updates begin to be undertaken for completion no later than T+2.

*\*Where practicable and timetable finalisation has occurred on time, must occur between T-1 and T+1.*

- T-0 weeks – Changes, as agreed by all appropriate bodies in the weeks prior, go live.

## **ANNEX 2: TICKETING PRODUCTS**

### **Part b: Under 21 single fare product**

A uniform single fare product available for single journeys for passengers aged between 5 and 21 years which is accepted by Operators on all local bus services operating in the administrative areas of the NECA and the NTCA.

### **Part c: Under 21 multimodal capped one day fare product**

A capped all day fare product which is available for passengers aged between 5 and 21 years which is accepted by Operators on all local bus services operating in the administrative areas of the NECA and the NTCA as well as Tyne and Wear Metro, the Shields Ferry and relevant local rail services.

### **Part d: Adult multimodal capped one day fare product**

A capped all day fare product which is available for adults which is accepted by Operators on all local bus services operating in the administrative areas of the NECA and the NTCA as well as Tyne and Wear Metro, the Shields Ferry and relevant local rail services, provided that separate products may be created which are valid only in, and/or different price points specified for use in, each of Tyne & Wear, Durham and Northumberland.

**ANNEX 3: MAINTAINING EXISTING FACILITIES**

<b>Reference</b>	<b>Authority</b>	<b>Title of Order</b>
EF01	Durham	The County Council of Durham (A690/ A691 Millburngate Junction, and unclassified Millburngate, Durham City) (Bus Lane and No Entry) Order 2004
EF02	Durham	The County Council of Durham (C184 Newcastle Road Chester Le Street) (Bus and Cycle Lane) Order 2004
EF03	Durham	The County Council of Durham (B6288 & A167 Croxdale, Durham) (Bus, Coach, Pedal Cycle and Motor Cycle Lane) Order 2011
EF04	Durham	The County Council of Durham (Various Locations, County Durham) (Bus, Cycle, Motorcycle & Taxi Lanes 7am-7pm) Order 2014
EF05	Durham	The County Council of Durham (Various Locations, County Durham) (Bus, Cycle, Motorcycle & Taxi Lanes 7am-7pm) Order 2014 (Amendment No.1) Order 2016
EF06	Durham	The County Council of Durham (North Road, Durham City) (Bus Gate) Order 2018
EF07	Gateshead	The Borough Council of Gateshead (Winlaton Area) (Amendment) Traffic Regulation Order 2007
EF08	Gateshead	The Borough Council of Gateshead Council (Traffic Movements) (Consolidation) Order 2010
EF09	Gateshead	The Borough Council of Gateshead (Durham Road Gateshead) (Prohibition of Right and Left Hand Turns and Bus and Cycle Lanes) Order 2010
EF10	Gateshead	The Borough Council of Gateshead (Felling Bypass / Felling Bypass Westbound Slip Road from Lingey Lane Gateshead) (Bus Lane) Order 2013
EF11	Gateshead	The Borough Council of Gateshead (Leam Lane Central Gateshead) Traffic Regulation Order 2014
EF12	Gateshead	The Borough Council of Gateshead (Lingey Lane Felling) (Traffic Restrictions) Traffic Regulation Order 2014
EF13	Gateshead	The Borough Council of Gateshead (Bus Lanes) Traffic Regulation Order 2014
EF14	Gateshead	The Borough Council of Gateshead (Durham Road QTC Phase 4 Part 2 Gateshead) Traffic Regulation Order 2016

Reference	Authority	Title of Order
EF15	Gateshead	The Borough Council of Gateshead (Bus Lanes Gateshead) (Amendment No.1) Traffic Regulation Order 2017
EF16	Gateshead	The Borough Council of Gateshead (Bus Lanes Gateshead) (Amendment No.3) Traffic Regulation Order 2019
EF17	Gateshead	The Borough Council of Gateshead (Sunderland Road Gateshead) (Bus Lane Amendment No.4) (Waiting Restrictions) Traffic Regulation Order 2022
EF18	Gateshead	The Borough Council of Gateshead Askew Road and Surrounding Area Traffic Regulation Order 2022
EF19	Newcastle	City of Newcastle Upon Tyne (Bus Lanes) Traffic Regulation Order 2014
EF20	Newcastle	City of Newcastle Upon Tyne (Bus Lanes) Traffic Regulation Order 2014 (Cowgate Highway Improvement Area Variation) Order 2015
EF21	Newcastle	City of Newcastle Upon Tyne (Bus Lanes) Traffic Regulation Order 2014 (John Dobson Street and St Mary's Place Variation) Order 2015
EF22	Newcastle	City of Newcastle Upon Tyne (Bus Lanes) Traffic Regulation Order 2014 (Great North Road Variation) Order 2016
EF23	Newcastle	City of Newcastle Upon Tyne (Bus Lanes) Traffic Regulation Order 2014 (Monument Area Variation) Order 2016
EF24	Newcastle	City of Newcastle Upon Tyne (Bus Lanes) Traffic Regulation Order 2014 (William Armstrong Drive Variation) Order 2017
EF25	Newcastle	City of Newcastle Upon Tyne (Bus Lanes) Traffic Regulation Order 2014 (Neville Street Variation) Order 2019
EF26	Newcastle	City of Newcastle Upon Tyne (Bus Lanes) Traffic Regulation Order 2014 (Barras Bridge Variation) Order 2019
EF27	Newcastle	City of Newcastle Upon Tyne (Bus Lanes) Traffic Regulation Order 2014 (Killingworth Road Variation) Order 2019

Reference	Authority	Title of Order
EF28	Newcastle	City of Newcastle Upon Tyne (Bus Lanes) Traffic Regulation Order 2014 (Barras Bridge and St. Mary's Place Variation) Order 2021
EF29	Northumberland	Northumberland County Council (Laverock Hall Road Bus Lane) Order 2020 (TROM_144)
EF30	North Tyneside	The Council of the Borough of North Tyneside (Bus Lane) (Consolidation) Order 2020
EF31	South Tyneside	South Tyneside Council (Movement Restrictions) (Consolidation) Order 2021
EF32	Sunderland	The City of Sunderland (Hetton-Le-Hole Town Centre) (Loading Only Bays) Order 2003
EF33	Sunderland	The City of Sunderland (South Sunderland Area) (Prescribed Routes) (Consolidation) Order 2003
EF34	Sunderland	The City of Sunderland (North Sunderland Area) (Prescribed Routes) (Consolidation) Order 2003
EF35	Sunderland	The City of Sunderland (West Sunderland Area) (Prescribed Routes) (Consolidation) Order 2003
EF36	Sunderland	The City of Sunderland (Wheatsheaf Gyratory) Traffic Order 2013
EF37	Sunderland	The City of Sunderland (St. Mary's Way Area) Traffic Order 2015
EF38	Sunderland	The City of Sunderland (Dene Street, Silksworth) (Access for Buses and Cycles Only) Order 2018
EF39	Sunderland	The City of Sunderland (Houghton Town Centre) Traffic Order 2019
EF40	Sunderland	The City of Sunderland (Washington Area Bus Links and Bus Lanes) Amendment Order 2022

**SCHEDULE 3: REQUIREMENTS IN RESPECT OF LOCAL SERVICES****1.1. Vehicle standards**

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>Reference</b>	<b>Standard Description</b>	<b>Local Services or Area to which standard applies</b>	<b>Date from which service standard is to be met</b>	<b>Dependency</b>
OP01	<p>Audio Visual Equipment:</p> <p>All newly manufactured vehicles to be fitted with next-stop audio visual equipment as standard in order to improve the onboard passenger experience.</p>	All local services within the EP Scheme area excluding services stated in Section 5 of this EP Scheme	Within [ ] [days/weeks/months] of the Scheme Commencement Date	
OP02	<p>Vehicle Standards:</p> <p>All newly manufactured vehicles will meet, as a minimum, Euro VI standards</p>	All local services within the EP Scheme area excluding services stated in Section 5 of this EP Scheme	Within [ ] [days/weeks/months] of the Scheme Commencement Date	

<p>OP03</p>	<p>Real Time Information:  To be provided in accordance with data specifications agreed through the innovation partnership, and which will be utilised by back office systems referred to in reference ITS01b in the table in Schedule 2</p>	<p>All local services within the EP Scheme area that run along the corridors set out in reference ITS01a in the table in Schedule 2 and wish to have use of the hurry calls at signals, excluding services stated in Section 5 of this EP Scheme</p>	<p>Within [ ] [days/weeks/months] of the Scheme Commencement Date</p>	<p>Provision by Authorities of back office systems referred to at reference ITS01b in the table in Schedule 2, which will utilise information supplied by Operators</p>
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## 1.2. Ticketing

1 Reference	2 Standard Description	3 Local Services or Area to which standard applies	4 Date from which service standard is to be met	5 Dependency
OPT01	<p><b>Smart Card:</b></p> <p>Customers can use an agreed single common Pay-As-You-Go ITSO-compliant smart card when paying for any journeys by bus</p>	All local services within the EP Scheme area excluding services stated in Section 5 of this EP Scheme	Within [ ] [days/weeks/months] of the Scheme Commencement Date	
OPT02	<p><b>Ticketing Products:</b></p> <p>Operators shall:</p> <p>(1) co-operate as reasonably requested by any Authority in relation to the development by Authorities of a reimbursement scheme and any other schemes required in relation to the ticketing products set out in Annex 2 to this Schedule 2, as referred to at reference F&amp;T01 in the table in Schedule 2; and</p> <p>(2) following development by Authorities of the reimbursement scheme and any other schemes required as referred to in paragraph (1) above, provision of the ticketing</p>	All local services within the EP Scheme area excluding services stated in Section 5 of this EP Scheme	Within [ ] [days/weeks/months] of the Scheme Commencement Date	<p>(1) Development by Authorities of a reimbursement scheme and any other schemes required; and</p> <p>(2) Following development by Authorities of the reimbursement scheme and any other schemes required as referred to in paragraph (1) above, provision by [Authorities] of such reimbursement scheme and any other schemes required, each as referred to at reference F&amp;T01 in the table in Schedule 2</p>

1	2	3	4	5
Reference	Standard Description	Local Services or Area to which standard applies	Date from which service standard is to be met	Dependency
	products referred to in Annex 2 of this Schedule 2			

### 1.3. General

1	2	3	4	5
Reference	Standard Description	Local Services or Area to which standard applies	Date from which service standard is to be met	Dependency
OPR01	<p>Reinvestment in the EP Scheme Area of Operator savings derived directly from this EP Scheme:</p> <p>Operators shall:</p> <p>(1) report to TNE on Operator savings derived directly from this EP Scheme in accordance with section 8.11 of this EP Scheme on an annual basis; and</p> <p>(2) implement reinvestment of Operator savings as directed and required by Authorities and/or TNE.</p>	All local services within the EP Scheme Area excluding services stated in Section 5 of this EP Scheme	From the Scheme Commencement Date	Directions from Authorities and/or TNE (as applicable) regarding the reinvestment of Operator savings, as referred to at reference ATNE05 in the table in Schedule 2.

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## North East Joint Transport Committee

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**Date:** 18 October 2022  
**Subject:** Transport Budget 2023/24  
**Report of:** Chief Finance Officer

### Executive Summary

This report summarises the process and timetable for the approval of the levies and other budgets relating to the Joint Transport Committee (JTC). The report sets out the context and initial strategy for the development of proposals for these budgets in 2023/24 and into future years.

The budget proposals will be further developed and consulted upon in the coming months, and decisions on the levies and other aspects of the Transport Budget will be taken by the JTC on 17 January 2023.

Proposals for the Durham and Northumberland levies will be driven by the Transport budgets for those authorities which are being prepared in tandem. The Tyne and Wear levy is largely determined by the grant required by Nexus, with £2.1m currently retained to fund costs relating to the former Tyne and Wear Integrated Transport Authority and contributions to the work of Transport North East (TNE). It is recommended that this retained levy amount is kept at the same level for 2023/24.

The current recommendation is for the topslice of the Local Transport Plan (LTP) Integrated Transport Block grant funding towards the TNE team to be maintained at the current level of £0.500m (equal shares equating to £0.063m per authority).

Based on the initial estimates, indications are that it will be necessary to increase the Tyne and Wear Transport Levy in both 2023/24 and 2024/25, as reported during the 2022/23 budget setting process. Initial forecasts suggest an increase to the levy of 4% (£2.6m) in 2023/24 and 3.75% (£.5m) in 2024/25 will be necessary. Nexus is experiencing significant inflationary budget pressures, particularly in relation to high voltage power, and the position relative to the Medium Term Financial Plan (MTFP) presented to the JTC in January 2022, the position for 2023/24 and beyond has worsened significantly.

In order to set a break-even budget on the Tyne Tunnels, an increase will be required to the tolls for Class 2 and Class 3 vehicles early in the 2023 calendar year. A report will be presented to the Tyne and Wear Sub Committee for consideration and decision at their meeting on 3 November. Members of the JTC will be aware that increases in the shadow tolls, which are used to determine the contract payments to the concessionaire (TT2), are

driven by inflation. Unless the actual tolls keep pace with these increases the Tyne Tunnels account will not be balanced and income generated will fall short of the expenditure incurred in servicing the debt charges and meeting the contractual obligations to TT2.

This report underpins the development of the detailed Transport Budget proposals for 2023/24 which will be brought to this Committee for consideration in November.

### **Recommendations**

The North East Joint Transport Committee is recommended to receive this report for consideration and comment, which will inform the development of the Transport Budget Proposals 2023/24 report from the NECA Chief Finance Officer to the November meeting of this committee.

## **1. Background Information**

- 1.1 The North East Joint Transport Committee receives funding from a variety of sources including the levies on Durham, Northumberland and Tyne and Wear councils, Tyne Tunnels tolls income, grant funding and interest income. This funding is used to deliver the transport objectives of the Committee through the delivery of public transport services via Durham and Northumberland Councils and Nexus, and the work of the Transport North East Team, who work on behalf of the JTC to provide it with relevant information and policy choices and deliver its policies at a regional level.
- 1.2 In line with the Transport Levying Bodies Regulation, the transport levies must be issued by 15 February preceding the commencement of the financial year in respect of which they are to be issued.
- 1.3 This report summarises the process and timetable for the approval of the levies and other budgets relating to the JTC and sets out the initial strategy for these budgets in 2023/24 and future years. The proposals will be further developed and consulted upon in the coming months, and decisions on the levies and other aspects of the Transport Budget will be taken by the JTC on 17 January 2023. Decisions on the Tyne Tunnels tolls will be taken by the Tyne and Wear Sub Committee (TWSC) on 3 November 2022.

## **2. Proposals**

### **Budget Context**

- 2.1 The 2023/24 budget preparations are taking place in the context of considerable pressure and uncertainty in the economy and local authority finances.
- 2.2 The consumer price index (CPI) rose by 10.1% in the 12 months to July 2022, and is on course to increase further during the autumn, the highest rate for over 30 years. Inflation is creating significant budget challenges for local authorities and the JTC's delivery partners who are faced with huge increases in energy bills and increased demand for services.
- 2.3 The Bank of England in its quarterly Money Policy Report published on 4 August 2022 forecast that inflation would rise to around 13% over the next few months, driven by higher energy prices and higher prices from goods purchased from abroad. The bank base interest rate was raised to 1.75%, with further increases anticipated in September. Other organisations have forecast even higher levels of inflation, with one US financial services group saying it expected the consumer prices index (CPI) to hit 18% in the first quarter of 2023, while the Retail Prices Index (RPI) would soar to 21%. Inflation is forecast to remain above 10% into next spring but then to fall sharply to below its 2% target by the middle of 2024.
- 2.4 Public transport usage in the region has not fully returned to pre-pandemic levels, with bus passenger numbers in July being 78% of pre-Covid levels. This has had an impact on bus operators' finances and routes across the North East have already seen major cutbacks this year. Nexus have also been impacted by reduced patronage, with Metro passenger numbers in July at 82% of 2019/20 levels.

- 2.5 Authorities in the region continue to work towards access to the City Region Sustainable Transport Settlement (CRSTS) announced as part of the 2020 UK Budget. This is a £4.2bn fund over a five year period for investment in intra-city transport to be shared between eight city regions from 2022, of which the North East is one. Access to the fund is subject to the creation of appropriate governance arrangements to agree and deliver the funding, namely the formation of a Mayoral Combined Authority.

### **Timetable and consultation**

- 2.6 Appendix 1 sets out the timetable of when proposals will need to be considered to enable the Transport budget and levy decisions to be taken by the JTC on 17 January 2023. The timetable meets the need for consultation on the 2023/24 budget proposals, as set out in NECA's constitution (in its role as Accountable Body for the JTC).
- 2.7 The NECA constitution sets out the process which must be followed to ensure that appropriate and effective consultation takes place with all members and other stakeholders on the content of the budget.
- 2.8 The initial high-level draft budget proposals for 2023/24 contained in this report will be developed further and subject to consultation with the JTC Overview and Scrutiny Committee on 13 October with updated detailed proposals being brought back to the JTC on 15 November.
- 2.9 Detailed proposals will be referred back to the JTC Overview and Scrutiny Committee on 15 December.
- 2.10 Taking into account the outcome of this consultation, final proposals in relation to the Transport budget and levies will be considered at the JTC meeting on 17 January 2023.

### **Transport North East**

- 2.11 Since its creation in 2018 to support the JTC, the Transport North East (TNE) team has been working at full capacity to develop and lead delivery of a broad and ambitious transport programme on behalf of the region.
- 2.12 Over the past year, TNE has:
- Reviewed its structure to focus on modal strategy and the development of business cases and delivery plans for regional level interventions;
  - Developed and delivered a regional transport communications plan;
  - Continued horizon scanning for funding, bidding and partnership opportunities, including successful bids to the North East Local Enterprise Partnership and the award of £163.5m for the Bus Service Improvement Plan and Enhanced Partnership scheme;
  - Developed a more detailed suite of modal strategy and policy documents to support the overarching outputs of the Transport Plan;
  - Continued to develop the regional position on rail devolution and bus policy;

- Continued to support Northumberland County Council as it prepares to implement the Northumberland Line scheme;
- Managed the region's relationship and represented the region's needs with Transport for the North, the Rail North Partnership and the new Northern Transport Acceleration Council;
- Formulated the JTC's response to transport consultations and policy making opportunities;
- Continued to make the case for investment in the East Coast Mainline and continued funded provision of the East Coast Mainline Authorities Secretariat role;
- Managed the distribution of funds through the North East Transport Assurance Framework;
- Contributed to the North East LEP's strategies, plans and workstreams;
- Managed the Concession contract with TT2 through a complex transition to open road tolling;
- Delivery of EV charging hubs at key strategic sites identified in the Electric Vehicle enabling study;
- Sponsored the development of specific programmes of work of regional significance associated with the transport plan or associated with the publication of the Connectivity blueprint such as bus and cycling infrastructure and network improvements;
- Provided public access 24/7 to fully operational Tyne Pedestrian and Cycle Tunnels

- 2.13 TNE is funded from a variety of temporary and permanent sources including a topslice of the Local Transport Plan (LTP Integrated Transport Block grant, a contribution from the retained transport levy, Local Transport Authority capacity grant, Transforming Cities Fund (TCF) grant.
- 2.14 As referenced in paragraph 2.5, it is expected that the region will continue to work towards agreement of the CRSTS which will provide a new funding source to coincide with the end of some existing time-limited funding such as TCF. However, this may not be confirmed by the time of preparing detailed budget proposals for the JTC.
- 2.15 Any funding 'gap' in 2023/24 will be bridged through application of interest and investment income and/or reserves, with the expectation that this is funded on a more permanent basis once a CRSTS revenue settlement is reached.
- 2.16 Detailed budget proposals for TNE will be presented to the committee in the November budget report, taking into account the latest information about the availability of DfT grant funding. However, it is proposed that for 2023/24, the contributions from the JTC's constituent local authorities are maintained at the current level, i.e. a £0.5m topslice from the LTP Integrated Transport Block grant (on an equal shares basis of £0.063m per authority).

## **Transport Levies**

- 2.17 In accordance with the Transport Levying Bodies Regulations, the levies for 2023/24 must be issued by 15 February 2023.
- 2.18 Budget proposals for Durham and Northumberland County Councils are being worked up by these authorities, and these will inform the calculation of the levies and Transport Grants for these areas for 2023/24. Draft proposals will be included in the report to the November meeting of the committee.
- 2.19 The measure of population which must be used to apportion the Tyne and Wear Transport levy between the constituent authorities is the total resident population at the relevant date of the area of each Authority concerned (the relevant date being 20 June in the financial year which commenced prior to the levying year).
- 2.20 It is proposed that the element of the levies which is retained to fund costs relating to the former Tyne and Wear Integrated Transport Authority and some central costs of the Joint Transport Committee is maintained at the current level of £2.120m (£2.100m of this from the Tyne and Wear levy and £0.01m from each of the Durham and Northumberland levies).

## **Nexus**

- 2.21 The majority of the Tyne and Wear Levy (£63.125m in 2022/23, or 97% of the total levy) is paid as a grant to Nexus for the delivery of public transport services in Tyne and Wear.
- 2.22 Nexus' gross revenue budget for 2022/23 is £170.2m, with £63.1m (37%) funded from the Tyne and Wear Transport Levy. In addition, in order to underpin the revenue budget and protect services in 2022/23, it was agreed that Nexus would use reserves of £5.6m.
- 2.23 During budget setting for 2022/23, it was highlighted that it may be necessary to increase the Tyne and Wear Transport Levy further in both 2023/24 and 2024/25 given Nexus cannot place reliance on reserves indefinitely. Initial forecasts suggested that an increase to the levy of 4.0% (amounting to £2.6m) in 2023/24 and 3.75% (amounting to £2.5m) in 2024/25 would be necessary. This was in addition to Nexus using an additional £3.1m of reserves in 2023/24 to enable services to be maintained, during recovery from the Covid pandemic.
- 2.24 During the year to date, Nexus has seen recovery in customer numbers using the Metro, introduced measures to tackle anti-social behaviour on Metro and reacted to systemic changes in the bus network by reconfiguring and growing its own secured services provision. This is all being done against a backdrop of delivering major capital investment in new trains, a new depot, other essential renewals and the construction of a new line in South Tyneside (Metro Flow).
- 2.25 However, inflation has risen significantly above the levels previously assumed and this has had a hugely detrimental effect on a range of costs making up Nexus' budget. In particular, the cost of high voltage power has more than doubled, caused by geo-political factors and continued instability in the energy market. There are other

pressures relating to contract price inflation, instability in the bus market where, as the paragraph above outlines, Nexus has had to step in and preserve services which would otherwise have been lost and employee pay, where at the time of writing, negotiations for the April 2022 pay award remain ongoing.

- 2.26 Despite this, the position is considered manageable this year due to the receipt of £8.8m of additional central government support in the form of Local Transport Funding (LTF). However, further support of this nature is unlikely, therefore relative to the Medium Term Financial Plan (MTFP) presented to the JTC in January 2022, the position for 2023/24 and beyond has worsened significantly.
- 2.27 Nexus is currently refreshing budget estimates for 2023/24 and 2024/25, and preparing the forecast for 2025/26 as it refreshes its MTFP. At this point in time, it is not expected that the Tyne and Wear Transport Levy will need to increase beyond the amount which was outlined in the previous MTFP and referenced in paragraph 2.23 above.
- 2.28 The refreshed MTFP is expected to place reliance on reserves for longer than previously anticipated, something that is possible because of the better financial position reported in 2021/22. The adoption of such a strategy is considered prudent given the need to maintain services as far as possible, in order to ensure Nexus emerges from the Covid pandemic in a positive way, something that the recovery plan for the Metro submitted to central government in January 2021 insisted on. Further, despite the significant financial challenges that Nexus faces, savings are expected to arise from the introduction of the new fleet, together with a reduction in the track access charge payable to Network Rail for operating on the Sunderland line, now that the debt associated with the construction of the extension is nearly fully repaid. Although Metro fare revenue is still behind pre-Covid levels, there is cautious optimism about recovery, although the position remains fragile and the cost of living crisis is something that could reverse progress in this regard.
- 2.29 It is clear that a number of risks will need be proactively managed in order to ensure that Nexus can continue to maintain services and as paragraph 2.27 refers to, this will only be possible if the Tyne and Wear Transport Levy increases as previously indicated.

### **Tyne Tunnels**

- 2.30 The Tyne Tunnels are accounted for as a ring-fenced account within the JTC budgets, meaning that all costs relating to the Tunnels are wholly funded from toll income received and Tyne Tunnels reserves, with no call on the levy or other government funding. The JTC receives all of the toll income from the vehicle tunnels in the first instance, and payments are made under the contract to the concessionaire, TT2 Ltd., based on traffic levels. Sums retained by the JTC meet costs associated with the Tunnels, primarily interest and principal repayments on borrowing taken out to fund the New Tyne Crossing project, and client costs associated with management of the contract with TT2.
- 2.31 Payments to the TT2 under the concession contract increase in line with Retail Prices Index (RPI) inflation. The financial model for the Tyne Tunnels assumes that tolls will be maintained in real terms to match the rise in contract payments to TT2 and service

debt financing on the tunnels. To allow a break-even position on the Tyne Tunnels revenue account to be maintained, it is assumed that toll increases will be applied where possible in line with the Order.

- 2.32 The toll charged to users of the Tunnels can be increased in line with RPI (to a round 10p figure). Levels of inflation, as described in section 2.2-2.3, are such that an increase will be required for both Class 2 and Class 3 vehicles. A recommendation will be made to the Tyne and Wear Sub Committee at their November meeting about the level and timing of this increase.

### **3. Reasons for the Proposals**

- 3.1 The NECA Constitution requires that consultation on budget proposals be undertaken at least two months prior to the budget being agreed. Proposals for consultation will be presented to the JTC at its meeting in November, and this report sets out the context and issues around the budget for 2023/24.

### **4. Alternative Options Available**

- 4.1 This report is for information.

### **5. Next Steps and Timetable for Implementation**

- 5.1 Financial forecasts will be updated and more detail will be presented to the JTC at its meeting in November 2022, with a view to recommending formal agreement of the budget and levies in January 2023.

### **6. Potential Impact on Objectives**

- 6.1 The budget assumptions presented in this report are designed to support the achievement of the Transport policy objectives of the JTC.

### **7. Financial and Other Resources Implications**

- 7.1 The financial and other resource implications are summarised in detail in the body of the report where they are known. Further details which are developed as part of the budget development and consultation process will be identified in reports to the November 2022 and January 2023 meetings of the JTC.

### **8. Legal Implications**

- 8.1 The JTC must ultimately approve the transport budget and levies unanimously. There are no legal implications arising from this report which is for information.

### **9. Key Risks**

- 9.1 Financial risks associated with the authority's activities, and actions taken to mitigate these, will be factored into strategic risk management processes for the JTC.

### **10. Equality and Diversity**

- 10.1 There are no equality and diversity implications arising from this report.
- 11. Crime and Disorder**
- 11.1 There are no crime and disorder implications arising from this report.
- 12. Consultation/Engagement**
- 12.1 The NECA Constitution (in its role as accountable body for the JTC) requires that consultation on its budget proposals be undertaken at least two months prior to the budget being agreed.
- 13. Other Impact of the Proposals**
- 13.1 There are no other impacts arising from this report.
- 14. Appendices**
- 14.1 Appendix 1 – Budget Timetable 2023/24 – Joint Transport Committee
- 15. Background Papers**
- 15.1 JTC revenue budget report February 2022 -
- 16. Contact Officers**
- 16.1 Eleanor Goodman, NECA Finance Manager,  
[eleanor.goodman@northeastca.gov.uk](mailto:eleanor.goodman@northeastca.gov.uk), 0191 433 3860
- 17. Sign off**
- The Proper Officer for Transport:
  - Head of Paid Service:
  - Monitoring Officer:
  - Chief Finance Officer:
- 18. Glossary**

## Appendix 1 – Budget Timetable 2023/24 – Joint Transport Committee

<b>Date</b>	<b>Meeting/Event</b>	<b>Action</b>
13 September 2022	JTC	Initial budget proposals in relation to JTC/Transport budgets. Consultation requirements to be considered/agreed.
13 October 2022	JTC Overview and Scrutiny Committee	Examine initial budget and consultation proposals and make any recommendations to the JTC.
3 November 2022	JTC Tyne and Wear Sub Committee	Consider report on draft budget proposals with specific reference to Tyne and Wear (Tunnels/Nexus).
15 November 2022	JTC	Consider draft Transport budget proposals and any feedback from JTC Overview and Scrutiny Committee.
22 November 2022	NTCA Cabinet	Consider draft Transport budget proposals and implications regarding transport levy for constituent authorities as part of the budget consultation process.
6 December 2022	NECA Leadership Board	Consider draft Transport budget proposals and implications regarding transport levy for constituent authorities as part of the budget consultation process.
15 December 2022	JTC Overview and Scrutiny Committee	Consider updated budget proposals as part of consultation process (if necessary).
17 January 2023	JTC	Approve transport revenue budget and transport levies. Approve transport capital programme.
24 January 2023	NECA Leadership Board	Note the decision of the JTC and issue transport levies to NECA constituent authorities.
31 January 2023	NTCA Cabinet	Note the decision of the JTC and issue transport levies to NTCA constituent authorities.

15 February 2023	Levy letters issued to constituent authorities	Date by which transport levies must be issued in line with the Transport Levying Bodies Regulations
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## North East Joint Transport Committee

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**Date:** 18 October 2022  
**Subject:** North East Active Travel Strategy Update  
**Report of:** Managing Director, Transport North East

### Executive Summary

Work is currently underway to develop a North East Active Travel Strategy, a key commitment in the North East Transport Plan.

The Active Travel strategy will set out how the region will enable people to walk, cycle or wheel short journeys they'd usually make by car, such as those under two miles, and support those already travelling actively. This change will boost the physical and mental wellbeing of our residents and enhance our environment and economy.

This report provides an update on progress made in the development of the strategy, including a timeline for the production and approval to consult on the strategy document.

It is proposed that the draft strategy will be submitted to JTC in November 2022 for approval to progress to a public consultation. The strategy will be updated following the consultation and approval to publish will be sought from the JTC in March 2023.

### Recommendations

The Joint Transport Committee is recommended to note the strategy update.

## **1. Background Information**

- 1.1 The North East Transport Plan, published March 2021, set a vision of “Moving to a green, healthy, dynamic and thriving North East.” Within the North East Transport Plan, a commitment was made to develop and publish a North East Active Travel Strategy.

Encouraging and enabling more walking, cycling and wheeling can have significant benefits including improved health, reduced carbon emissions, air and noise pollution and road congestion. Delivery of these benefits will contribute towards achieving the Transport Plan’s vision and objectives.

## **2. Proposals**

- 2.1 The primary goal of this strategy is to enable people to walk, cycle or wheel short journeys they’d usually make by car, such as those under two miles, and support those already travelling actively. This change will boost the physical and mental wellbeing of our residents and enhance our environment and economy and help to move to a green, healthy, dynamic and thriving North East.

- 2.2 The strategy will also raise the importance of walking, which has the potential for the biggest gains to address high levels of physical inactivity in the region. In the North East 1 in 4 adults are physically inactive, meaning that they do less than 30 minutes physical activity per week. This is the highest inactivity level among all English regions.

Active travel is one of the most practical ways for many people to move more and work towards and achieve recommended activity levels as it can be woven into regular everyday journeys.

- 2.3 The strategy, which will cover the period up to 2035, will look to build upon existing behaviour change and infrastructure schemes whilst also proposing regional interventions. As part of this, the strategy will also identify schemes which connect active travel to public transport stations and interchanges, enabling people to make part of their journey by active travel and part by public transport. The strategy will also link to relevant proposals set out in the “Making the Right Travel Choice” strategy as well as the region’s suite of transport strategies.

- 2.4 It is intended that the draft strategy will establish a headline target to get more people travelling actively for more journeys, which the region’s leaders can endorse and champion.

- 2.5 Transport North East are currently working with local authorities, Nexus, Sustrans, Living Streets and other key active travel stakeholders to share best practice and ensure that the strategy builds upon work already underway.

- 2.6 A steering group has been formed comprised of members with key expertise in active travel. Their role is to monitor the progress of the strategy during its continued development, receive updates and provide a steer on key topics upon request.

## **3. Reasons for the Proposals**

3.1 This report provides an update on progress of the development of the North East Active Travel Strategy.

#### **4. Alternative Options Available**

4.1 Not applicable.

#### **5. Next Steps and Timetable for Implementation**

5.1 The strategy will continue to be developed, working in conjunction with local authorities and other key stakeholders. Approval to consult on the draft strategy will be sought from JTC in November 2022.

5.2 The project plan for the development of the Active Travel Strategy includes the following key milestones:

<b>Date</b>	<b>Milestone</b>
August- October 2022	Initial drafting of strategy
September - October 2022	Stakeholder engagement and super feedback week
November 2022	JTC requested to approve consultation draft strategy
November 2022- January 2023	Public consultation (9 weeks)
February 2023	Consultation responses and proposed changes to the strategy taken to JTC
March 2023	JTC requested to approve strategy for publication

#### **6. Potential Impact on Objectives**

6.1 The Active Travel Strategy will be fully aligned with the North East Transport Plan vision and five objectives and will help to deliver all of them.

#### **7. Financial and Other Resources Implications**

7.1 There are no financial implications to produce the Active Travel Strategy. Any subsequent regional schemes or initiatives will need to secure funding through capital or revenue bids.

#### **8. Legal Implications**

8.1 There are no legal implications at this stage of production of the Active Travel Strategy.

#### **9. Key Risks**

9.1 There are no specific key risks identified arising from this report.

#### **10. Equality and Diversity**

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

## **11. Crime and Disorder**

11.1 There are no specific crime and disorder implications arising from this report.

## **12. Consultation/Engagement**

12.1 A steering group has been established to help with the early development of the strategy and to keep the project focussed. Active Travel Stakeholder forums are planned in the autumn. A proposed public consultation is planned to cover a 9-week period beginning in November 2022.

## **13. Other Impact of the Proposals**

13.1 The delivery of a North East Active Travel Strategy will significantly help with the planning and implementation of regional interventions aimed at delivering the Transport Plan vision and objectives.

## **14. Appendices**

14.1 None.

## **15. Background Papers**

15.1 None.

## **16. Contact Officers**

16.1 Rachelle Forsyth-Ward, Head of Transport Policy and Strategy Development  
Rachelle.forsythward@transportnortheast.gov.uk

## **17. Sign off**

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

## **18. Glossary**

All acronyms or technical terms used are explained in the body of the report.