

North East Joint Transport Committee

Tuesday, 21st March, 2023 at 2.30 pm

Meeting to be held in a Whickham Room - Civic Centre

AGENDA

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1. Apologies for Absence	
2. Declaration of Interests	
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. Minutes of the meeting held on 17 January 2023	3 - 8
4. Notes of the inquorate meeting held on 21 February 2023	9 - 14
5. Establishment of the Enhanced Partnership (EP)	15 - 138
6. Transforming Cities Fund Tranche 2 - Grant Funding Agreements	139 - 148
7. JTC Revenue Budget Update	149 - 156
8. Forecast of Capital Outturn 2022/23 - Period to 31 December 2022	157 - 168
9. Forecast of Revenue Outturn 2022/23 - Period to 31 December 2022	169 - 182
10. Transport Plan Progress Report	183 - 192
11. Date of next meeting	

The next meeting will take place on Tuesday 18 April at 2.30pm in the Whickham Room, Gateshead Civic Centre.

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NORTH EAST JOINT TRANSPORT COMMITTEE

DRAFT MINUTES FOR APPROVAL

DATE: 17 JANUARY 2023

Meeting held: Whickham Room, Gateshead Civic Centre

COMMITTEE MEMBERS PRESENT:

Councillor: M Gannon (Chair)

Councillors: E Gibson, N Kemp, C Johnson, C Rowntree, E Scott and R Wearmouth

IN ATTENDANCE:

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

Officers: J Bailes, F Bootle, L Clifford, P Fleming, A Flynn, R Forsyth-Ward, A Graham, D Gittins, E Goodman, J Higgins, M Jackson, H Jones, L Keating, M Kearney, H Jones, S McNaughton, P Meikle, E Reynard and R Watson,

In attendance: P Smith (TT2 Ltd)

46. APOLOGIES FOR ABSENCE

Apologies for absence were received from Councillor G Miller and Councillor G Sanderson.

47. DECLARATIONS OF INTEREST

There were no declarations of interest.

48. MINUTES OF THE MEETING HELD ON 20 DECEMBER 2022

The minutes were agreed as a correct record.

49. TRANSPORT BUDGET AND LEVIES 2023/24

The Committee received a report which set out the proposed Transport Revenue Budget and associated Transport Levies for the North East Joint Transport Committee, together with indicative forecasts for future years for consideration and approval. The proposals within the report took into account comments received at the meeting on 15 November 2022 when the Committee was consulted on the outline proposals and also includes input from the JTC Overview and Scrutiny Committee.

The two Combined Authorities within the JTC area are required to set the Transport Levies before 15 February 2023 to enable their constituent authorities to take levies and other contributions into account when setting their own budgets. The two Combined Authorities will meet to agree the levies agreed by JTC on 24 January 2023 (NECA) and 31 January 2023 (North of Tyne CA).

The report also provided an update on the revenue budget outturn for 2022/23 and set out revenue resources planned to be used in 2023/24 to deliver the objectives of the JTC.

The proposed budget and levy for public passenger transport activity in County Durham is £16.912m for 2023/24, of which £16.902m will be payable as a grant to Durham County Council and £10,000 retained to contribute to the central costs of the JTC. This compares with a levy for 2022/23 of £15.619m, of which £15.609m was payable as transport grant.

The proposed budget and levy for public transport activity in Northumberland is £6.458m for 2023/24, of which £6.448m will be payable as a grant to Northumberland County Council and £10,000 retained to contribute to the central costs of the JTC. This compares with a levy of £6.357m for 2022/23, of which £6.347m was payable as transport grant.

The proposed levy for public transport activity in Tyne and Wear is £67.800m for 2023/24, of which £65.700m will be payable as a grant to Nexus. This represents a year-on-year increase of £2.575m (approximately 4%) in the levy compared with 2022/23 when the Tyne and Wear levy was £65.225m. As in previous years, £2.100m of the Tyne and Wear levy will be retained and used to help fund central costs of the JTC, primarily relating to the former Tyne and Wear Integrated Transport Authority (TWITA) functions.

The gross expenditure budget proposed for the Transport North East (TNE) core budget is £1.037m in 2023/24, funded through a range of sources, including a contribution from the Local Transport Plan (LTP) Integrated Transport Block grant of £500,000 (equating to £62,500) for each of the seven local authorities and Nexus), contribution from external grants to meet programme management costs, a contribution from the Transport levies and other specific revenue grants

received from central government, including funding towards the Bus Enhanced Partnership.

The Tyne Tunnels revenue account forecast for 2022/23 is for a deficit of £0.101m, and a deficit of £0.412m for 2023/24, which will be funded from Tyne Tunnels reserves. These estimates take into account the decision of the Tyne and Wear Sub Committee (TWSC) to defer until at least 1 May 2023, the application of the required toll increase for Class 2 and Class 3 vehicles triggered by the Retail Price Index (RPI) measure of inflation.

Councillor Gannon was happy with the report and proposals but highlighted that using reserves is not a sustainable position. He noted that the energy crisis is contributing to the issue and that there is a proposal to use reserves to subsidise Nexus' budget from April when the Government's Energy Support Grant funding ends. Under current conditions, Nexus do not qualify for support after April under the Government's replacement Energy Bills Discount Scheme and representations will be made to Government about this. Councillor Gannon noted that although the fare box income is increasing, and energy costs have reduced from their peak, local authorities have no option but to increase their financial contribution and even then Nexus is still heavily reliant on using reserves.

Councillor Gibson asked whether patronage had increased on Metro since the £2 fare had been introduced and where the highest fare increases would be applied after April.

Officers advised that as the fare increase had only been applied from 1 January, it was too early to be able to report on increased patronage. Officers would provide a breakdown of the fare increases but advised that those passengers who used a Pop Card would travel at a reduced fare rate.

RESOLVED: The North East Joint Transport Committee:

- (i) Noted the position of the Transport budget in 2022/23 and approved the revised estimates for the year;
- (ii) Agreed a Transport net revenue budget for 2023/24 of £91.170m, as set out in section 2.5 of the report;
- (iii) Agreed the following Transport Levies for 2023/24:

a. Durham County Council	£16.912m
b. Northumberland County Council	£6.458m
c. Tyne and Wear councils	£67.800m

(detailed in Table 6 , section 2.15 of the report)
- (iv) Agreed a transport revenue grant to Durham County Council for the delivery of transport services of £16.902m, as outlined in section 2.7 of the report;

- (v) Agreed a transport revenue grant to Northumberland County Council for the delivery of transport services of £6.448m, as outlined in section 2.10 of the report;
- (vi) Agreed a transport revenue grant to Nexus for the delivery of transport services in Tyne and Wear of £65.700m;
- (vii) Approved the budget for the Tyne Tunnels set out in section 2.71 of the report, which includes the effect of the decisions taken by the Tyne and Wear Sub-Committee on 15 November 2022;
- (viii) Approved the budget for Transport North East as set out in section 2.64-2.68 of the report;
- (ix) Noted and agreed the forecast level and use of reserves at section 2.80-2.82 of the report.

50. TRANSPORT CAPITAL PROGRAMME 2023/24

The Committee considered a report which provided an updated forecast capital outturn for 2022/23 and presented an initial 2023/24 capital programme totalling £238.994m for consideration and approval.

The report identified the total capital expenditure on Transport schemes of £251.408m is now forecast for 2022/23 against the revised programme budget of £272.737m. The main variance since the last update reported to the Committee is a substantial revision of forecast expenditure on the Transforming Cities Fund (TCF) Tranche 2 programme, alongside a reduction in forecast expenditure on the Active Travel Fund Tranche 3 programme, where some schemes have entered a change control process which must be concluded before schemes can progress.

There are also variances forecast on the Metro Asset Renewal Programme, Metro Fleet Replacement, Nexus Other Capital Projects, and Metro Flow which are detailed within the report.

£53.470m of capital expenditure is forecast on TCF Tranche 2 schemes in 2022/23. This is a sizeable revision of the most recent forecast expenditure (£87.025m) and has arisen largely due to a failure to meet assurance milestones and progress the development of schemes within the programme at the required pace. £44.009m of expenditure has therefore been profiled into 2023/24.

The report sets out details of the Nexus capital programme for 2023/24 totalling £163.315m which includes the Metro Asset Renewal Programme (£43.897m), Fleet Replacement Programme (£115.236m), Other Nexus Capital Projects (£3.107m) and Metro Flow (£1.075m). Indicative figures for 2024/25 and 2025/26 are included, which are subject to approval of funding.

The programme includes an estimated £14.057m of Local Transport Plan Integrated Transport Block grant that will be received by NECA on behalf of the JTC, most of which will be paid to constituent authorities and Nexus on a quarterly basis to support their capital programmes. Expenditure on the Nexus elements is included in the sections on the Nexus capital programme and to avoid double counting the remaining £11.309m is reported against the LTP programme line.

RESOLVED: The North East Joint Transport Committee:

- (i) Noted the latest position in respect of the 2022/23 capital programme, set out from section 2.1 of the report:
- (ii) Approved the proposed initial capital programme for 2023/24 which amounts to £238.894m as set out from section 2.1 of the report.

51. TRANSPORT PLAN PROGRESS REPORT

The Committee received a report which provided 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'.

Devolution

The Government have published a new devolution deal for the region, which if agreed, will take effect in May 2024. A new Mayoral Combined Authority will be established with an Elected Mayor replacing the two existing Combined Authorities. The deal will unlock £563m from the City Regional Sustainable Transport Fund to help improve transport infrastructure in the region.

Sunderland Station

Following the last meeting, the Chair wrote to the Rail Minister raising concerns about Sunderland Station, which affected rail and Metro services. A response was received, and improvements were made. However there have since been further issues affecting Sunderland Station which officers from Nexus are following up with Northern Rail.

East Coast Main Line Timetables

The Chair of the Committee wrote to the Rail Minister in November raising concerns about possible changes to the ECML timetable. A response has been received today which advises that the proposed changes are due to be implemented in 2023. A copy of the letter will be circulated to the Committee.

Active Travel England Award

The region has been awarded £1.4m of funding from Active Travel England's Capability Fund. The funding will be used alongside local authority resources to design schemes and develop plans to deliver high quality walking, cycling and wheeling infrastructure across the region.

Buses

The Bus Recovery Grant that the Government has provided to bus operators following Covid, will finish at the end of March. If there is no additional funding offered to bus operators, there are likely to be service reviews and cuts in the new financial year.

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

52. DATE OF NEXT MEETING

The next meeting of the Joint Transport Committee will be held on Tuesday 21 February 2023 at 2.30pm in the Bridges Room at Gateshead Civic Centre.



NORTH EAST JOINT TRANSPORT COMMITTEE

DRAFT NOTES FOR APPROVAL

DATE: 21 FEBRUARY 2023

Meeting held: Bridges Room, Gateshead Civic Centre

COMMITTEE MEMBERS PRESENT:

Councillor: M Gannon (Chair)

Councillors: E Gibson, E Scott and R Wearmouth

IN ATTENDANCE:

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

Officers: G Armstrong, J Bailes, F Bootle, L Clifford, J Fenwick, A Flynn,
R Forsyth-Ward, A Graham, D Gittins, E Goodman, P Holmes,
H Jones, L Keating, H Lewis, S McNaughton, P Meikle C
Mordue and E Reynard

In attendance: S Walker (Stagecoach)

53. APOLOGIES FOR ABSENCE

Apologies for absence were received from Councillor C Johnson, Councillor N Kemp, Councillor G Miller and Councillor G Sanderson

The Monitoring Officer advised that the meeting was inquorate. The Chair and members present agreed to continue with the meeting on an informal basis and discuss the items on the agenda, noting that no decisions could be made by the Committee today.

54. DECLARATIONS OF INTEREST

There were no declarations of interest.

55. MINUTES OF THE MEETING HELD ON 17 JANUARY 2023

The minutes could not be agreed as the meeting was inquorate and would be presented for agreement at the next meeting.

Matters Arising

At the last meeting, Councillor Gibson asked whether that had been any increases in patronage on Metro following the introduction of the £2 fare cap. Officers advised today that the number of people using a Pop card has increased from 12% - 35% compared with the same time period last year.

56. QUALIFYING AGREEMENT

The members present considered a report which proposed that a Qualifying Agreement be certified between the relevant bus operators who provide services on the A1058 Coast Road to link Central Newcastle with part of North Tyneside.

The Bus Service Improvement Plan included plans to use Qualifying Agreements (QAs) to co-ordinate network consolidation to the benefit of passengers by allocating existing resources more efficiently.

QAs are defined in the Transport Act 2000 and allow for consolidation of bus services in circumstances where bus operators compete directly with one another, resulting in greater capacity being on offer than demand would normally require. The Local Transport Authority (in this case the Joint Transport Committee, exercises the relevant powers on behalf of the two Combined Authorities) can certify the QA if it considers that certain requirements are met, being that the QA:

- (a) is in the interests of people using local (bus) services within the combined area of the authorities, and
- (b) does not impose on the undertakings concerned restrictions that are not indispensable to the attainment of the bus improvement objectives (re TA2000, Schedule 2, Part 2, Para 18(4)).

If the QA is certified it is exempted from the application of competition law, which would otherwise make it a prohibited agreement, and therefore makes it an agreement that the relevant operators can safely enter into.

The proposed QA will benefit bus passengers in a number of ways, including by:

- standardising bus timetables between operators, ensuring even spacing between services;

- introducing reciprocal ticket arrangements, increasing the number of buses passengers will be able to catch regardless of which operator they purchased their ticket from.

The overall number of bus services using the Coast Road corridor will be reduced as a result of the QA, delivering efficiency savings to bus companies to help with the financial sustainability of the overall bus network. However, the effect for the majority of bus passengers will be that their tickets will be capable of being used on a greater number of bus services and timetables along the Coast Road will provide a more regular frequency than currently.

The Committee Members did not raise any questions regarding the report.

The Monitoring Officer advised that as the meeting was inquorate, and the report was time sensitive, that it may be necessary for the matter to be considered as an urgent item of business under the JTC's Rules of Procedure, and a decision taken under the relevant officer delegation. The members present raised no objection to this approach.

57. JTC REVENUE BUDGET UPDATE

The members present considered a report which requested an update to the revenue budget for 2022/23 and 2023/24 which was agreed at the last meeting on 17 January 2023. This is due to announcement which have been made regarding revenue grant funding which Transport North East administers on behalf the region. This does not affect the transport levies agreed at the last meeting which were subsequently agreed by the NECA Leadership Board and North of Tyne Combined Authority Cabinet.

The Active Travel Capability Fund (£1.414 million) will provide revenue funding for design and engagement on a range of active travel infrastructure schemes and the delivery of a region-wide programme of training, information, and e-bike trials. It is forecast that £0.236 million will be defrayed in 2022/23 and £1.170 million will be defrayed in 2023/24.

The City Region Sustainable Transport Settlement (CRSTS) revenue grant (£5.682 million in 2022/23, £2.841 million in 2023/24 and £2.841 million in 2024/25) supports the delivery of the CRSTS capital programme in addition to building transport planning and delivery capacity. It is proposed that in the first instance revenue funding is utilised to develop, assure and manage the CRSTS programme. In terms of the initial allocation, it is forecast that £0.293 million will be defrayed in 2022/23 and £6.187 million will be defrayed in 2023/24.

The Committee Members present did not raise any questions regarding the report.

The Monitoring Officer advised that as the meeting was inquorate, that the approval sought to update the revenue budgets would be presented to the next meeting of the Joint Transport Committee.

58. TRANSPORT PLAN PROGRESS REPORT

The Committee received a report which provided 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'.

Levelling Up Funding

The North East Combined Authority has been successful in its bid on behalf of the North East region for funding from the Levelling Up Fund second round. Funding will help deliver electric buses, charging infrastructure for the buses and further electric vehicle charging infrastructure. A total of £19.5 million was awarded to the North East Combined Authority on behalf of the JTC.

Active Travel

The North East has received an allocation of £1.4m from Active Travel England's Capability Fund. This one-year revenue settlement is intended to fund the design and engagement on a range of active travel infrastructure schemes and will require an amendment to the 22/23 and 23/24 budgets agreed at the last meeting of the JTC.

City Region Sustainable Transport Settlement

In January the region received £5.682m of revenue funds from the Department of Transport in respect of the City Region Sustainable Transport Settlement (CRSTS), following the signing of the North East devolution deal with Government. Revenue funding will support the development of the CRSTS capital investment programme and help build longer-term local transport planning and delivery capacity.

Bus Recovery Grant

The Government has recently announced that the Bus Recovery Grant funding to support bus operators following the pandemic, and which was due to end on 31 March 2023, will be extended to 30 June 2023. This is welcome news as the cessation of the funding was likely to mean bus service cuts of up to 20% across the region.

£2 Bus Fare

The Government also recently announced that the subsidised £2 capped bus fare which was introduced on 1 January 2023 will also be extended until 30 June 2023.

Road Infrastructure

There is growing pressure to develop a strategic plan for improvement of the road infrastructure on the A19 at the Moor Farm and Seaton Burn junctions. The lack of redevelopment is impacting on economic and housing regrowth. In addition, the region is still waiting for an early decision on the A1 Morpeth to Ellingham dualling scheme which was postponed in December 2022. The decision is now expected in September 2023.

Councillor Wearmouth advised that there is lots of work ongoing by the Council and local MPs in relation to the A19 junctions to ensure the business case for the improvements is clear and defined. He asked whether officers were aware of any timescales regarding when decisions would be made by Highways England.

Officers advised that there are no deadlines yet regarding this work, but officers from Transport North East are developing a strategic relationship with Highways England which will hopefully support decisions like this in the future.

Councillor Gannon noted that there were some very positive issues within the report including the Levelling Up Funding and the £2 bus fare. However he noted that it was very difficult at times, to get any public buy-in into the long-term strategic vision for transport in the region, as often the good news stories from Government are short-term funding settlements.

Councillor Gibson raised concerns about the Clean Air Zone which had been implemented in Gateshead, Newcastle and North Tyneside and the impact it was having on taxi drivers from South Tyneside. He advised that taxi drivers from South Tyneside had complained that they do not qualify for grant funding for new cars or are eligible for the 128 days grace relating to fines, which other taxi drivers and companies from the CAZ local authority areas are eligible for.

Councillor Gannon acknowledged that discussions still need to take place regarding the arrangements across the region and advised that the funding was provided by the Government so there was a stringent process in place which needed to be followed.

Pamela Holmes advised that discussions have taken place with between officers in Newcastle and South Tyneside about this issue, however priority for grant funding is being given to Newcastle, Gateshead and North Tyneside in the first instance. Should any funding be available once the process has been completed then it will be offered to South Tyneside drivers. She also advised that there had been issues with the way vehicles have been registered with DVLA and work is ongoing to get these resolved.

Councillor Gibson raised a further issue about the time zone for the CAZ charges. Should a taxi driver have a fare in the CAZ area and it overlaps at midnight then two charges are applicable.

Pamela advised that this was a national issue for all CAZ. The times always run from midnight to midnight. Work is ongoing regarding a possible discount for South Tyneside drivers.

Councillor Gannon added that the local authorities in the CAZ area did not receive all of the funding requested from Government so the grants available were not as generous as it had been hoped. He advised that there was a meeting due to take place on Wednesday 22 February at which he would raise these issues.

59. DATE OF NEXT MEETING

The next meeting of the Joint Transport Committee will be held on Tuesday 21 March 2023 at 2.30pm in the Whickham Room at Gateshead Civic Centre.

North East Joint Transport Committee

Date: 21 March 2023

Subject: Bus Enhanced Partnership (EP) Scheme

Report of: Managing Director, Transport North East

Executive Summary

Following the publication of our Bus Service Improvement Plan (BSIP) in October 2021, and the indicative funding award of £163.5 million in April 2022, a regional Enhanced Partnership (EP) Plan and Scheme has been prepared (the North East EP Plan and Scheme). After approval to consult was granted by this committee, on the 15th of November 2022, the North East EP Plan and Scheme passed through an operator objection period and statutory consultation which ran from the 13th of December 2022 to the 10th of January 2023 and the 11th of January to the 8th of February 2023 respectively.

The purpose of this report is to inform the Joint Transport Committee (JTC) of responses received during the EP statutory consultation and operator objection period and to recommend the JTC make the North East EP Plan and Scheme.

Recommendations

The North East Joint Transport Committee is recommended to:

- (i) note the responses received during the statutory consultation on the North East EP Plan and Scheme; and
- (ii) make the North East EP Plan and Scheme.

1. Background Information

- 1.1 The National Bus Strategy was published by the Department for Transport (DfT) on 15 March 2021 and set out central government's vision and the opportunity to deliver better bus services for passengers, through ambitious and far-reaching reform of how services are planned and delivered. The National Bus Strategy aligns with our region's published Transport Plan aspiration of 'Moving to a green, healthy, dynamic and thriving North East' by ensuring our bus network can be strengthened by building on successful partnership working between bus operators and local authorities.
- 1.2 Our BSIP responded to the National Bus Strategy and our regional objectives; it was published in October 2021. Following approval by the JTC in June 2021 the development of an EP has been progressed. An EP is a statutory partnership between Local Transport Authorities (LTAs) and their local bus operators and sets out how they will work together to deliver BSIP outcomes. An EP consists of two parts:
- an EP plan - a high-level vision and objectives for bus services in the local area and closely follows or replicates relevant sections of the BSIP, setting out a clear vision of the improvements to bus services that the EP is aiming to deliver; and
 - one or more EP schemes – an accompanying document which sets out the requirements that need to be met by local services that stop in the EP area and precise detail of how the BSIP vision and objectives will be achieved, including any commitments made by the local authority(ties) or standards to be met by bus operators.
- 1.3 Actions and outcomes set out in the BSIP for the LTA to deliver will be transposed into the EP scheme by imposing specific requirements on the LTA and highway authorities to provide 'facilities' (new physical assets or changes to them that are provided at specific locations within the EP area), and take 'measures' (anything else within a LTA's powers to deliver BSIP outcomes for the purpose of increasing use of local services serving the routes the measures relate to or ending or reducing a decline in their use, or improving the quality of local services). For bus operators, compliance with service standards set out in the EP will be a condition of bus operators' registration of services with the Traffic Commissioner. Any failure to comply in practice could result in the Traffic Commissioner taking enforcement action against an operator, which can include cancelling local bus service registrations.
- 1.4 An EP plan (EP Plan) and an EP scheme (EP Scheme) have been drafted by Transport North East and the content of these documents has been agreed with the DfT. As the partnership involves continuous engagement, with all parties working together to deliver the ambitions set out in the BSIP and EP Plan, and the EP Scheme sets out obligations on local authorities (including highway authorities) and local bus operators, a North East Regional Bus Partnership Board (Partnership Board) has been established to oversee the North East EP.
- 1.5 As part of the statutory process of establishing an EP, drafts of the EP Plan and the EP Scheme have been presented to bus operators who were notified so that they

had an opportunity to object if they did not agree with what is proposed. Following this objection period, as no objections were received, a period of statutory consultation commenced.

1.6 Responses received included comments on initiatives found in the EP Plan but not drafted into the EP Scheme, governance of the EP Scheme and the need for additional funding. Appendix 1 outlines these insights in greater detail as well as our responses to them.

1.7 Following approval by this committee the EP will be made, this will be a key milestone in unlocking our confirmed funding award of £163.5 million. Once funding is received, we will begin to deliver schemes which work towards our BSIP Key Performance Indicators (KPIs) to improve bus patronage, modal share, performance and customer satisfaction. Customers will begin to experience the following far reaching benefits on the bus network:

- new ticketing products, set out in the table, which will enable cheaper, simpler, multi-modal and multi-operator fares, something we know is a top priority for users and will attract more passengers to the network;

Product	Price
Under 22 single	£1
Under 22 regionwide day ticket (multi-modal)	£3
County Durham (multi-operator)	£4
Northumberland (multi-operator)	£5
Tyne & Wear (multi-modal)	£6
Two-Zone (multi-modal)	£6.50
Regionwide (multi-modal)	£6.80

- many new services and improved services, delivering new routes to connect communities and improving frequencies and operating hours for existing services;
- improved reliability and speed of buses through Bus Priority Infrastructure and Intelligent Transport Systems Investments, allowing users to rely on buses and attracting more people to use their local services. These will be along the major bus corridors stated in Schedule 2 of the EP Scheme;
- introduction of 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 of outdated bus stops and stations in the region to correct safety or accessibility issues that may be barriers to travel; and
- 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 have also been 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.

- 1.8 The EP Scheme, in its current form, contains initiatives and actions to be delivered early in the currency of the EP and 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 interventions 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.
- 1.9 As previously presented to this committee, the BSIP, and therefore the EP Plan and EP Scheme, set out an intention to formalise a governance structure to oversee the operations of the EP. The Partnership Board and Local Bus Boards have since been established with the Partnership Board meeting in shadow form. However, it is important to note that changes to the EP Plan and EP Scheme, along with the allocation and expenditure of BSIP funding, will be decisions which can only be made by JTC meaning the role of the Partnership Board and Local Bus Boards will be advisory.

2. Proposals

- 2.1 This report proposes that the North East Combined Authority and the North of Tyne Combined Authority, acting together through the North East Joint Transport Committee, make the North East EP Plan and Scheme.

3. Reasons for the Proposals

- 3.1 Making an EP is an essential step in unlocking our BSIP funding, failing to do so will 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.

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 EP 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 made. Following this the partnership will be able to progress BSIP schemes once funding has been received.

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 EP Scheme(s) will prevent the North East from accessing any new central government funding for buses (both capital and revenue support). Additional central 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 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. It should be noted that the EP Scheme contains a measure requiring Nexus, Durham County Council and Northumberland County Council to maintain their secured service and concessionary travel budgets at the actual spend of FY2022/23 (excluding LTF funds) for the duration of the EP.
- 7.3 Part of our funding award has been confirmed by the DfT however we are awaiting the full award to be confirmed in the next financial year. £117.8m was confirmed on the 3 March 2023, this was split into £79.8m in revenue funding and £40.9m in capital funding. If the remaining funding is not confirmed, 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 EP Scheme using the variation mechanism set out in section 8.6 of the EP Scheme in the event that funding is not provided.

8. Legal Implications

- 8.1 The EP follows a statutory framework set out in the Transport Act 2000 as amended by the Bus Services Act 2017, requiring legal notices to be published and statutory documents (the EP Plan and EP Scheme) to be prepared and made. Revised statutory guidance published by the Department for Transport on 1 July 2021 ('The National Bus Strategy Delivering Bus Service Improvement Plans using an Enhanced Partnership') has been followed and specialist legal advice has been sought in support of the development of the EP. Once made, the EP will become legally binding upon the LTA, LAs and bus operators.
- 8.2 As set out in 1.3 this will mean that compliance with the EP Scheme will be a condition of service registration for bus operators. If bus operators fail to comply with the requirements imposed on them under the EP Scheme, the Traffic Commissioner can take enforcement action, including the cancellation of local bus service registrations. In making the EP Transport North East and relevant local authorities (including highways authorities) will also be obliged to introduce

the facilities and measures in accordance with the EP Scheme (other than where these obligations have been postponed). Failure to do so would be a breach of statutory duty by the relevant authority – whilst the Transport Act 2000 does not expressly state the penalty that would apply, a claim for breach of statutory duty by an operator who has invested on the basis of provision of that facility could leave the relevant authority liable for damages and may make enforcement of the relevant operator standards difficult where such failure is a result of non-provision of those facilities or measures. Under the EP Scheme, where an authority is unable to introduce and/or deliver any facility or measure in the timescale specified, that authority may propose a Proposed Variation of the EP Scheme to the JTC to amend the relevant timescale. The Partnership Board will be used as a forum to resolve issues in bus operators' and authorities' compliance with respective requirements and obligations as they arise.

9. Key Risks

- 9.1 Failure to comply with the requirements of the National Bus Strategy by not making an EP would 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 to reform.
- 9.2 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. Central government has also stated that, subject to consultation, it intends that the Bus Service Operators Grant, once it has been reformed, will only be available to LTAs and operators in areas with an EP or which have started the statutory process of franchising. This grant allows operators to recover some of the cost of their fuel and the removal of this funding would threaten the viability of many of the region's secured and commercial services.
- 9.3 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 by varying the EP Scheme if funding is not available or interventions are 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 statutory consultation on the EP Plan and Scheme sought the views of a number of groups identified as statutory consultees. These consultees have been contacted directly and include bus operators, neighbouring authorities, police forces, the traffic commissioner for the North East of England, the Competition and Markets Authority and organisations representing transport users, such as Bus Users UK and Transport Focus. The responses received have been considered, further details of key insights and our response to these can be found in Appendix 1.

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 EP Scheme. In addition, LA7 officers have been briefed on the content of this report and LA7 and Nexus lawyers have reviewed and commented on draft versions of the EP Plan and EP Scheme.

13. Other Impact of the Proposals

13.1 None

14. Appendices

14.1 Statutory Consultation responses – Appendix 1
Draft Enhanced Partnership Plan – Appendix 2
Draft Enhanced Partnership Scheme – Appendix 3

15. Background Papers

15.1 North East Bus Service Improvement Plan: [TNE-BSIP_FINAL.pdf](#)
(transportnortheast.gov.uk)

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

The National Bus Strategy Delivering Bus Service Improvement Plans using an Enhanced Partnership 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

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17. Sign off

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

18. Glossary

BSIP – Bus Service Improvement Plan
BSOG – Bus Service Operators Grant
DfT – Department for Transport
EP – Enhanced Partnership
JTC – Joint Transport Committee
LTA – Local Transport Authority

Appendix 1- Statutory Consultation Responses

Our statutory consultation ran from 11 January to 8 February 2023 and sought the views of a number of groups, identified as statutory consultees, on our EP Plan and Scheme. The consultation materials were sent directly to consultees and an online survey was provided to fill in responses. Representatives from bus operators, neighbouring authorities, disability groups and transport user groups responded to the consultation; some key insights are detailed below.

Key insights from the consultation

During the consultation there was overall support for the EP Plan and Scheme and its aims to increase bus ridership by boosting bus performance, customer satisfaction and environmental performance. Some negative comments were received, the detail and response of these are detailed below, as these responses were not substantive no changes will be made to the EP Plan and Scheme at this stage.

Consultees were first asked to rank each of the North East Transport Plan objectives based on how well they believed the EP Plan and EP Scheme would help the region in achieving them. Results of this can be seen in Figure 1 which shows that consultees most often ranked 'appealing sustainable transport choices' in first place.

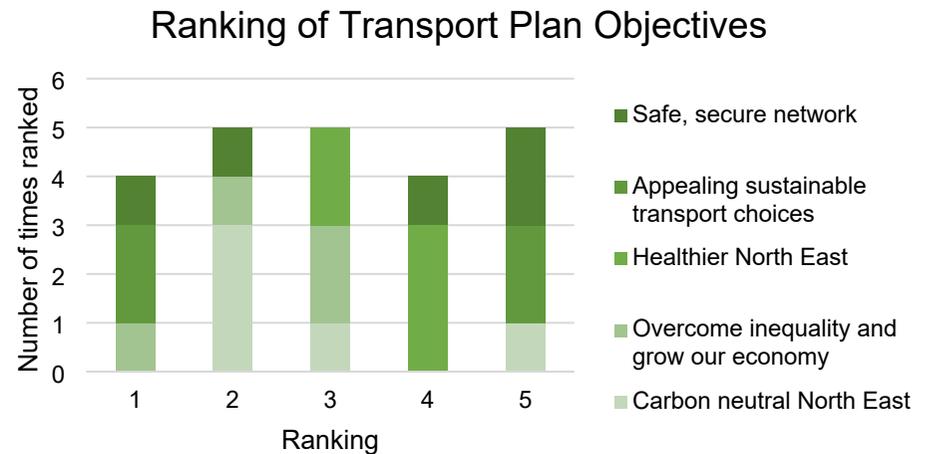


Figure 1 'With 1 being the highest score, please order each of the North East Transport Plan objectives based on how well you believe the EP Plan and EP Scheme help the region in achieving them'

In order to identify the most significant interventions, included in our EP Plan, which have not been carried through into the EP Scheme we then asked consultees to rank interventions according to their likely impact on bus use. As seen in Figure 2, results of this suggest that accelerating the replacement of buses to higher environmental standards and improving information at buses, including real time information, was judged as more impactful than bringing a consistent standard throughout the region's bus shelters and stops.

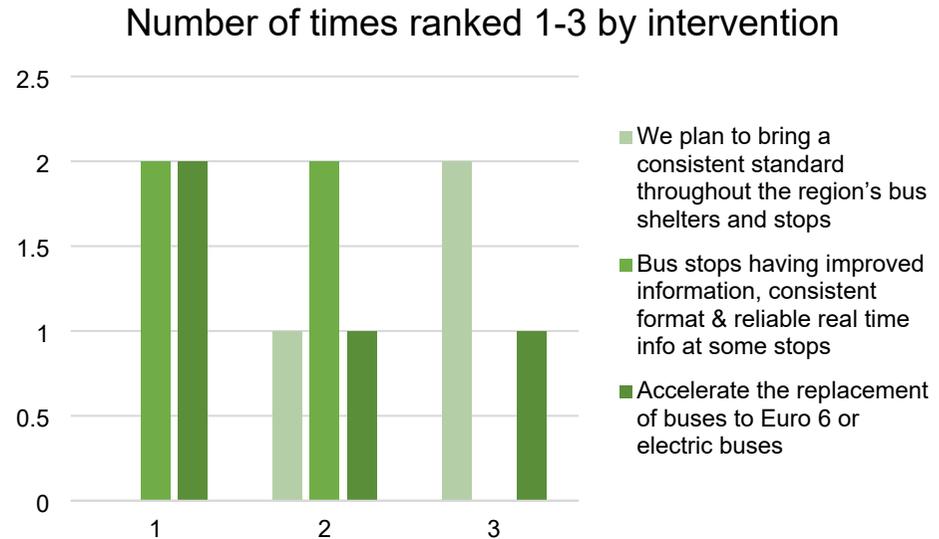


Figure 2: 'With 1 being the highest score, please order the following high-level interventions, which are not included in the EP Scheme, from high to low in their impact towards increasing bus use'

As well as multiple choice questions consultees were also asked to complete the following questions answered in a free text format:

- Do you think there are any objectives missing from the EP Plan?
- Do you think that the EP Plan & EP Scheme will impact your organisation/business?
- Do you have any additional comments on the Enhanced Partnership Plan?

This approach elicited the insights from consultees which are shown below, alongside our responses to comments:

Topic	Insight	Our Response
The need for more funding	Consultees highlighted the need for more funding if standards such as environmental performance of vehicles are to be met.	Since the drafting of the EP Plan and Scheme Transport North East have welcomed the announcement that the North East has successfully secured £19.5m of investment through the Levelling Up Fund for a Transport Decarbonisation package. This investment will deliver up to 52 new high-quality electric buses alongside 92 new Electric Vehicle (EV) chargers. This investment represents significant progress towards meeting our environmental performance targets set out in the EP Plan.
Service change dates	Consultees highlighted that the EP Plan did not include details of limitations to the number of network changes each year, or communication and consultation with passengers on significant changes. It was suggested these could be included in the Bus Passenger Charter.	Our 'Code of Conduct' sets out a service change timetable for any network changes as well as communication and consultation requirements. This is named as the 'Change Management Process' in the EP Plan and this separate document will be referenced in the Bus Passenger Charter.
Passenger information: disruption and journey planning	Consultees wanted to see commitments in the Bus Passenger Charter to provide a single source of passenger information of journey options as well as delays and disruptions.	A commitment to keeping passengers informed of disruption is included in our Bus Passenger Charter. Enhanced information will also be included in our region wide public transport app and website.
Rural bus routes	Consultees raised that direct, express buses between key rural locations should be considered. The importance of rural links was also highlighted, especially for disabled residents who may rely on public transport.	Public and stakeholder engagement during the development of the BSIP highlighted the need for enhanced bus services in rural areas. BSIP funded service enhancements will improve access for rural residents and express routes between key rural towns and villages could grow bus markets and will be considered during network reviews.
At stop passenger information	Consultees raised that accessible route and network connection maps and fare	There is currently significant flux in the bus network. We are planning that after our BSIP funding enhancements are introduced and the network stabilises branded connection maps will be created. In the

	information should be considered at major stops.	development of this information, we will consult with disability groups and relevant stakeholders to achieve accessibility standards.
Anti-social Behaviour	Consultees highlighted antisocial behaviour as a barrier to bus travel and feedback that a commitment to the regular removal of graffiti be considered.	Our Bus Passenger Charter includes firm commitments to tackle anti-social behaviour on the bus network, including a commitment of CCTV provision on buses and joint working with the region's police forces. A specific standard of graffiti removal is not currently committed to in the Bus Passenger Charter. This is something which could be introduced in the future, this, and other proposals, will be raised at the next Bus Partnership Board.
Reporting towards our BSIP KPIs	Consultees raised the need to clearly show the link between planned interventions and our BSIP KPIs, as well as details on how these will be reported.	As mentioned in the EP Plan interventions have been identified to target our BSIP KPIs. In development, each of our initiatives will have to demonstrate a strong alignment toward these objectives, with the Partnership Board providing a forum to assure this. Overall progress towards our BSIP KPIs will be reported in 6 monthly intervals to the Bus Partnership Board, Joint Transport Committee and will also be published on the partnership website once developed. The DfT has also launched a separate monitoring and evaluation plan for BSIPs which will complement our plans.
Governance and variation mechanism	Consultees raised concerns that due to the inclusion of a bespoke variation mechanism, changes to the EP Scheme could be made through variation mechanism rather than creating a new scheme which could impact on the obligation to consult.	The variation mechanism is a requirement of an EP Scheme and is intended to ensure the efficient delivery of objectives by limiting the statutory process required to make changes to the EP. A bespoke variation mechanism has been included in the EP Scheme to ensure detail and delivery plans can be added to the Scheme as initiatives are developed. Any major rework or change to the EP Scheme will still be made through the full statutory process which includes an operator objection period and statutory consultation, full details of this process can be found in section 8.6 of the EP Scheme. The forum for discussion of any variation of the EP Scheme will be the Bus Partnership Board and Local Bus Boards, as set out in sections 8.1 and 8.3 of the EP Scheme, these boards include representation from bus user groups, operators and LTAs.

Small Operators	Consultees raised the concern that larger operators have been prioritised in the EP Plan and Scheme.	Engagement with small operators is currently done through CPT representation at the Bus Partnership Board and any other relevant meetings. Local Bus Boards and meetings of 'NE Bus' also provide a great opportunity for TNE to engage with small operators. Despite this it can be challenging to engage with small operators with the same frequency as larger operators. Following this response, we will review our engagement strategy with small operators.
Cross Boundary Impacts	Consultees welcomed the positive impacts the EP Plan and Scheme will have on neighbouring authorities with regards to cross boundary services and fleet improvements.	We also welcome the positive impacts of cross boundary improvements and look forward to working with colleagues in neighbouring authorities to ensure maximum mutual benefits and integration.
Accessibility provisions	Consultees raised the importance of interventions which can improve accessibility of the bus network. These include: real time information, Audio Visual Announcements, accessible information as well as staff availability and specialist staff training. A concern was raised that the short time frame of the BSIP would not be long enough to deliver significant improvements.	Feedback such as this is extremely valuable in the development of our BSIP and EP and it is a priority that accessibility improvements are made throughout the region. While developing initiatives, for example, our plan for an integrated public transport app and website, we will ensure advice is sought from accessibility groups to ensure necessary standards. Our plan to introduce transport ambassadors throughout the region will also improve accessibility within the network as ambassadors will be on hand to help users make their journeys. For certain investments, such as in Audio Visual Announcements on board buses we are unable to directly invest in this improvement as the introduction of this technology is an operator led investment. Operators have made significant progress towards adopting this in recent years and investments such as Levelling-Up-funded electric buses will boost this progress. Throughout the development of all the previously mentioned initiatives we will continue to draw upon our relationships with disability groups and relevant stakeholders.

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

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 April 2023. The EP Plan will be reviewed by 31 October 2023 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

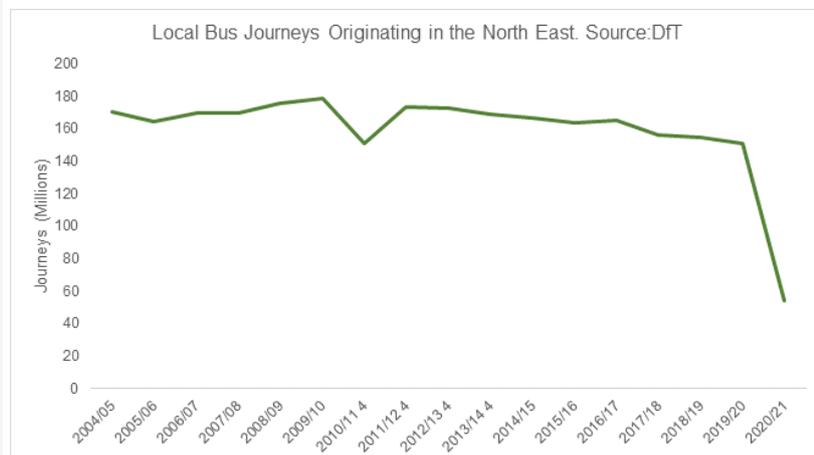
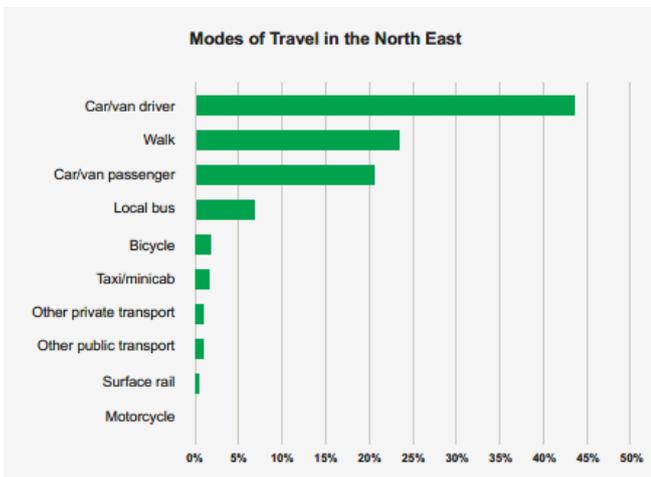
Metro and the Shields Ferry. Tyne and Wear is a largely urban sub-section of the region covering the local authority areas of Gateshead, Newcastle, North Tyneside, South Tyneside and Sunderland.

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.

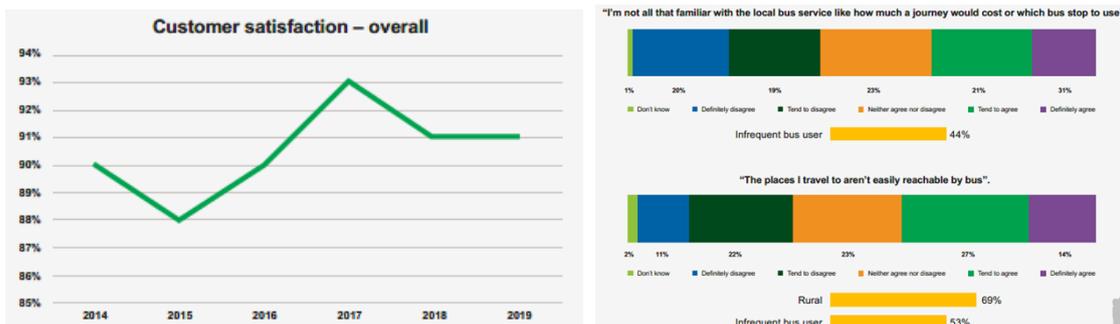


4.8. Patronage

- 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**

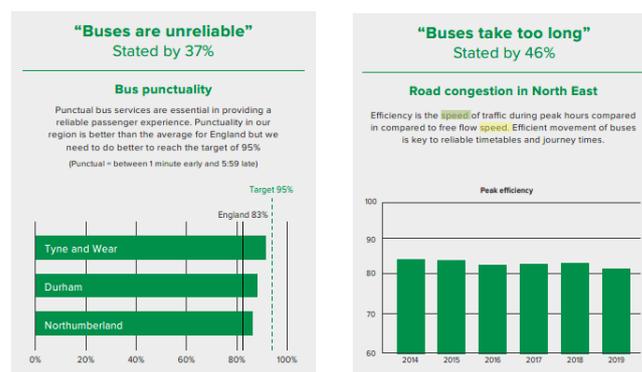
5.5. The buses in the EP Plan area have better punctuality than average for England, however they fall short of the 95% punctuality target (a bus running no more than 5 minutes late or 1 minute early on at least 95% of occasions).

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.

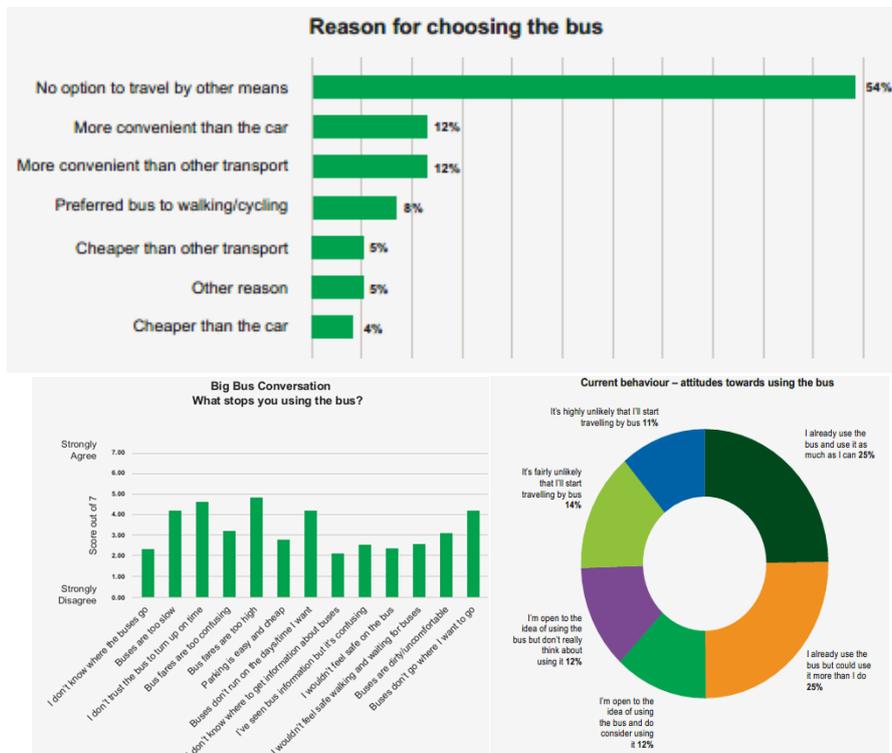
7. ALL THE RELEVANT FACTORS THAT THE PARTIES CONSIDER WILL AFFECT, OR HAVE THE POTENTIAL TO AFFECT, THE LOCAL BUS MARKET OVER THE LIFE OF THE EP PLAN

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.

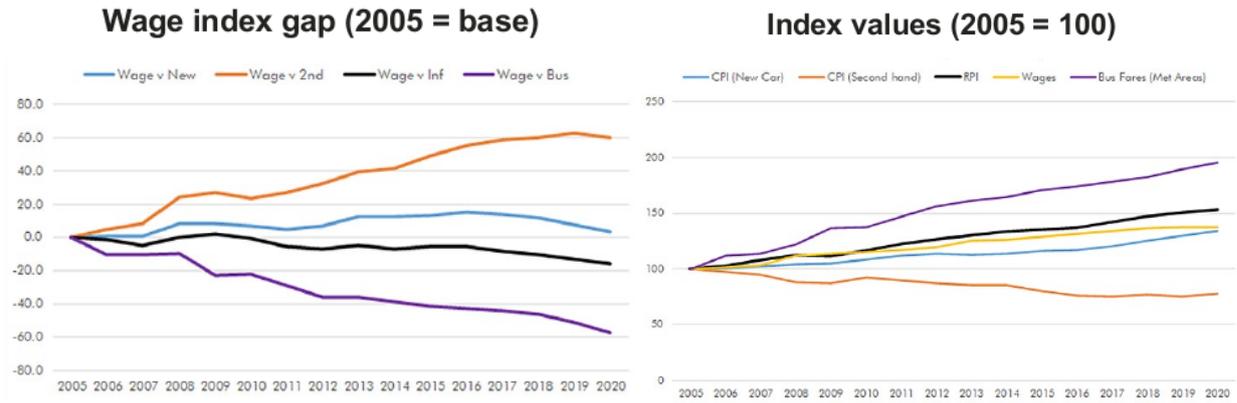
	Estimated number of LA operated spaces	Average hourly rate to park	Estimated number of private sector operated spaces*	Average hourly rate	Local authority	Budget allocated to parking enforcement
Durham	3,500	43p	2000	69p	Durham	£650,000
Gateshead	2,123	£1.04	756	92p	Gateshead	£799,000
Newcastle	6,004	£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:

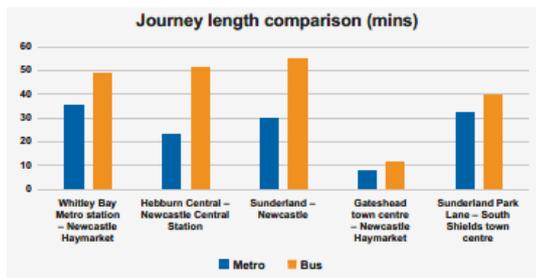
7.5. Relative Affordability Of Bus And Car Travel

- 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.

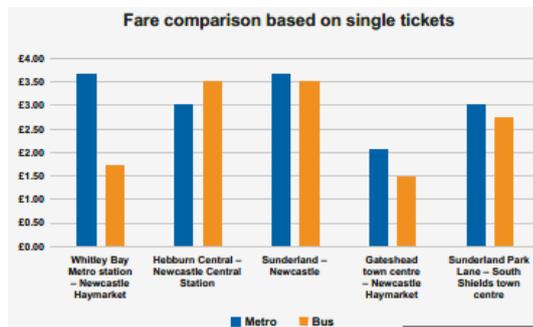


The Tyne and Wear Metro system

- 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.



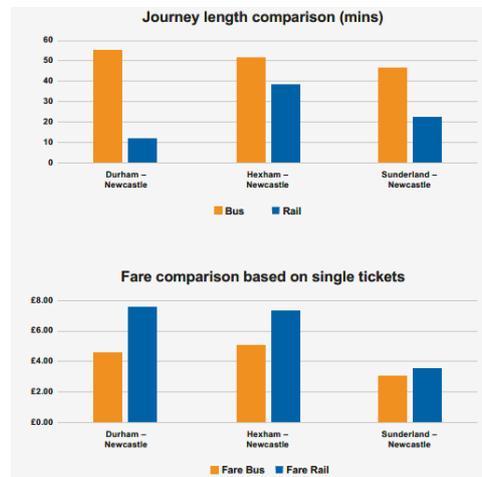
- 7.5.5. The below graph shows that for fare cost based on single tickets, buses compare favourably to Metro for some of the journeys, however Metro prices can also be cheaper, or near to the same cost. This means that the customer has a choice of transport which can depend on the customer's priorities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

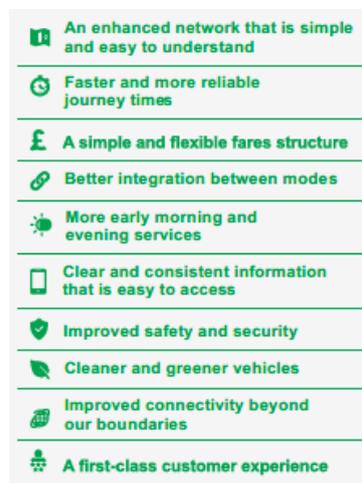
8. THE OBJECTIVES OF THE EP PLAN – IN TERMS OF HOW IT WILL IMPROVE THE QUALITY AND EFFECTIVENESS OF LOCAL BUS SERVICES IN THE CORRESPONDING EP SCHEME AREA

- 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 154m trips during the year 2023/24, 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 2024/25, and then by a further 10% in 2025/26.

9.8.3.2. **KPI 5:** Bus patronage from people under the age of 22 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, each year starting in 2023/24.

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 2023/24, 96% in 2024/25 and 97% in 2025/26.

9.8.5.4. **KPI 11:** Bus punctuality at all timing points point of origin to be 90% in 2023/24, 95% in 2024/25 and 95% in 2025/26.

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.

Category	Monday to Saturday Daytime	Sunday Daytime	Daily Evening	Overnight
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 Service Improvement Plan**" or "**BSIP**" means the bus service improvement plan which covers seven local authority areas in the North East, consisting of the NECA and the NTCA, as reviewed and updated from time to time.
 - 2.1.6 "**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.
 - 2.1.7 "**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.
 - 2.1.8 "**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.

- 2.1.9 **"EP Plan"** means an enhanced partnership plan as defined in section 138A(3) of the Transport Act 2000.
- 2.1.10 **"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.
- 2.1.11 **"EP Scheme Area"** means the area to which this EP Scheme applies.
- 2.1.12 **"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;
- 2.1.13 **"Local Authorities"** means Durham, Gateshead, Newcastle, North Tyneside, Northumberland, South Tyneside and Sunderland.
- 2.1.14 **"Local Bus Board"** has the meaning given to it in section 8.3.1.
- 2.1.15 **"Local Highway Authority"** means a Local Authority with responsibility for the maintenance of highway infrastructure in its local authority area.
- 2.1.16 **"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.
- 2.1.17 **"Local Service"** has the meaning given to it in section 2(1) of the Transport Act 1985.
- 2.1.18 **"Measures"** shall have the meaning given in section 138D(2) of the Transport Act 2000 and shall include improvements which have the aim of:
- 2.1.18.1 increasing the use of Local Services serving the routes to which the measures relate or ending or reducing a decline in their use; or
- 2.1.18.2 improving the quality of Local Services.
- 2.1.19 **"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.
- 2.1.20 **"Operator"** means an operator of a Local Service within the EP Scheme Area which is not exempt pursuant to section 5.
- 2.1.21 **"Panel"** has the meaning given to it in section 8.2.1.
- 2.1.22 **"Partnership Board"** has the meaning given to it in section 8.1.1.
- 2.1.23 **"Qualifying Operator"** means an Operator except where such Operator only operates Excluded Local Services.
- 2.1.24 **"Scheme Commencement Date"** means the date on which this EP Scheme comes into operation, as specified in section 4.1.

- 2.1.25 **"Transport North East"** or **"TNE"** means the 'Proper Officer for Transport', being the principal officer designated from time to time by the NEJTC who shall assist the NEJTC in its exercise of its transport functions in accordance with article 9(5) of the Newcastle Upon Tyne, North Tyneside and Northumberland Combined Authority (Establishment and Functions) Order 2018, and references to **"Transport North East"** or **"TNE"** in this EP Scheme shall include the officer group and/or staff under the control of the Proper Officer for Transport that support the NEJTC in developing and delivering transport and strategy across the EP Scheme Area.
- 2.1.26 **"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 21 March 2023 and shall come into operation on 2 April 2023.
- 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 begin work on the relevant Facility or Measure described in column 2 by and from the date or dates indicated in column 5 (as applicable) and deliver work on the relevant Facility or Measure by and from the date or dates indicated in column 6 (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 6. 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 6 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 7 of the table in Schedule 2 (*Facilities and Measures*) 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 (i) column 5 of the table in Schedule 2 (*Facilities and Measures*) from which work on the Facility or Measure is to be started by and (ii) column 6 of the table in Schedule 2 (*Facilities and Measures*) from which the Facility or Measure is to be delivered by, until a date or dates reasonably following the actual date or dates that the relevant Authority is able to begin work and deliver work (as applicable) on such Facility or Measure;

6.3.2 amends the date or dates specified for implementation of any requirement that is identified in column 7 of the table in Schedule 2 (*Facilities and Measures*) 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 (*Facilities and Measures*) 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 7 of the table in Schedule 2 (*Facilities and Measures*) 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 TNE, 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 March 2023 in advance of the commencement of the EP Scheme in April 2023, 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. The Partnership Board will make recommendations only and decision-making powers remain with the NEJTC.
- 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 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 TNE using the following email address buses@transportnortheast.gov.uk explaining what the issue is and its urgency. TNE 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 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 (*Facilities and Measures*), including any description of the proposed Facilities or Measures to be included in Appendix 1 (*Details of Facilities or Measures*) to Schedule 2 (*Facilities and Measures*);
 - 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. TNE 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 TNE 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 section 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

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	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:	Central Motorway Corridor: – 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. Funded by Transforming Cities Fund.	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). 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	No	From the Scheme Commencement Date	March 2023	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		addition of ANPR / CCTV cameras.				
	<p>Coast Road Extension Corridor: ITS Investment</p> <p>Funded by the Bus Service Improvement Plan.</p>	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	From the Scheme Commencement Date	March 2024	N/A
	<p>Seaton Burn Corridor: ITS Investment</p> <p>Funded by Transforming Cities Fund.</p>	Tyne and Wear Regional Traffic Signals Service and Newcastle Local Authority will deliver major works along this corridor including full junction renewals with conversion to Extra Low Voltage (ELV)	No	From the Scheme Commencement Date	March 2023	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		<p>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>				
	<p>Leam Lane: ITS Investment</p> <p>Funded by Transforming Cities Fund.</p>	<p>Tyne and Wear Regional Traffic Signals Service and Newcastle 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</p>	No	From the Scheme Commencement Date	March 2023	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		<p>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>				
	<p>Old Durham Road: ITS Investment</p> <p>Funded by Transforming Cities Fund.</p>	<p>Tyne and Wear Regional Traffic Signals Service and Newcastle 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)</p>	No	From the Scheme Commencement Date	March 2023	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		<p>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>				
	<p>South Shields Corridor: ITS Investment</p> <p>Funded by Transforming Cities Fund.</p>	<p>Tyne and Wear Regional Traffic Signals Service and Newcastle 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) /</p>	No	From the Scheme Commencement Date	March 2023	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		<p>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>				
	<p>A188/ A189 Corridor: ITS Investment</p> <p>Funded by Transforming Cities Fund.</p>	<p>Tyne and Wear Regional Traffic Signals Service and Newcastle 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>	No	From the Scheme Commencement Date	March 2023	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	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				
	<p>John Reid Road Corridor: ITS Investment</p> <p>Funded by Transforming Cities Fund.</p>	<p>Tyne and Wear Regional Traffic Signals Service and Newcastle 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</p>	No	From the Scheme Commencement Date	March 2023	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		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>Durham Road: ITS Investment</p> <p>Funded by Transforming Cities Fund.</p>	<p>Tyne and Wear Regional Traffic Signals Service and Newcastle 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</p>	No	From the Scheme Commencement Date	March 2023	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		communications to facilitate control via UTC and the addition of ANPR / CCTV cameras				
	<p>Miscellaneous Signals: ITS Investment</p> <p>Funded by Transforming Cities Fund.</p>	<p>Tyne and Wear Regional Traffic Signals Service and Newcastle 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>	No	From the Scheme Commencement Date	March 2023	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		and the addition of ANPR / CCTV cameras				
	<p>Westgate Road: ITS Investment</p> <p>Funded by Transforming Cities Fund.</p>	<p>Tyne and Wear Regional Traffic Signals Service and Newcastle 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 and the addition of ANPR / CCTV cameras</p>	No	From the Scheme Commencement Date	March 2023	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
	<p>South Shields to Sunderland Coastal Corridor: ITS Investment</p> <p>Funded by Transforming Cities Fund.</p>	<p>Tyne and Wear Regional Traffic Signals Service and Newcastle 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 and the addition of ANPR / CCTV cameras</p>	No	From the Scheme Commencement Date	March 2023	N/A
	<p>Wallsend BC15 Corridor: ITS Investment</p>	Tyne and Wear Regional Traffic Signals Service and Newcastle Local Authority	No	From the Scheme Commencement Date	March 2023	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
	Funded by Transforming Cities Fund.	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). 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				
	Ponteland Road Corridor: ITS Investment, funded by Transforming Cities Fund.	Tyne and Wear Regional Traffic Signals Service and Newcastle Local Authority will deliver major works along this corridor including full junction	No	From the Scheme Commencement Date	March 2023	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		<p>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>				
	<p>Dunston Corridor: ITS Investment</p> <p>Funded by Transforming Cities Fund.</p>	<p>Tyne and Wear Regional Traffic Signals Service and Newcastle Local Authority will deliver major works along this corridor including full junction renewals with conversion to Extra Low Voltage (ELV) signals (Siemens Plus+),</p>	No	From the Scheme Commencement Date	March 2023	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		<p>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>				
	<p>Newcastle to South Shields Corridor: ITS Investment</p> <p>Funded by Transforming Cities Fund.</p>	<p>Tyne and Wear Regional Traffic Signals Service, 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</p>	<p>Yes – required for Bus Lane to form part of scheme.</p>	<p>From the Scheme Commencement Date</p>	<p>March 2023</p>	<p>N/A</p>

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		<p>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>				
	<p>Bensham Road Corridor: ITS Investment</p> <p>Funded by Transforming Cities Fund.</p>	<p>Tyne and Wear Regional Traffic Signals Service and Newcastle 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</p>	No	From the Scheme Commencement Date	March 2023	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		<p>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>				
	<p>Chester Road A183 Corridor: ITS Investment</p> <p>Funded by Transforming Cities Fund.</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</p>	No	From the Scheme Commencement Date	March 2023	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		<p>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>				
	<p>A690 Sunderland Corridor: ITS Investment</p> <p>Funded by the Bus Service Improvement Plan.</p>	<p>Tyne and Wear Regional Traffic Signals Service and Sunderland City Council 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</p>	No	From the Scheme Commencement Date	March 2024	

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		<p>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>				
	<p>Morpeth Corridor: ITS Investment</p> <p>Funded by the Bus Service Improvement Plan.</p>	<p>Tyne and Wear Regional Traffic Signals Service and Northumberland County Council 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>	No	From the Scheme Commencement Date	March 2024	

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	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.				
	Blyth Corridor: ITS Investment Funded by the Bus Service Improvement Plan.	Tyne and Wear Regional Traffic Signals Service and Northumberland County Council 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	From the Scheme Commencement Date	March 2024	

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		<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>				
	<p>Scotswood Road Corridor: ITS Investment Funded by the Bus Service Improvement Plan.</p>	<p>Tyne and Wear Regional Traffic Signals Service and Newcastle City Council 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</p>	No	From the Scheme Commencement Date	March 2024	

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		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.				
	A184 Corridor: ITS Investment Funded by the Bus Service Improvement Plan.	Tyne and Wear Regional Traffic Signals Service and Gateshead Council 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). Minor works will also be delivered for sites that are already operating ELV and just require an upgrade to	No	From the Scheme Commencement Date	March 2024	

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		provide 4/5G communications to facilitate control via UTC and the addition of ANPR / CCTV cameras.				
	<p>Barrack Road Corridor: ITS Investment</p> <p>Funded by the Bus Service Improvement Plan.</p>	<p>Tyne and Wear Regional Traffic Signals Service and Newcastle City Council 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	From the Scheme Commencement Date.	March 2024	

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	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	<p>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 regionwide on all buses with the hurry call detection enabled on the routes where ITS01b has been deployed.</p> <p>Funded by Transforming Cities Fund.</p>	<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	From the Scheme Commencement Date	March 2023	Provision by Operators of data in accordance with the specifications of the innovation partnership referred to at reference OP03 in the table in paragraph 1.1 of Schedule 3
L01	<p>Information Provision:</p> <p>Provision and maintenance of printed information</p>	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	N/A	Within 3 months of the Scheme Commencement Date	N/A	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
	<p>at existing stops throughout the network.</p> <p>The format of timetable information will become consistent across the region where this improves information.</p> <p>Funded by a combination of existing Local authority funds and Bus Service Improvement Plan funds</p>	<p>section headed Bus 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>				
L02	<p>Multimodal Information Provision and Digital Information Provision:</p> <p>Information pertaining to intermodal travel</p>	<p>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 respect of Durham at part a of Appendix 1</p>	N/A	Within 3 months of the Scheme Commencement Date	N/A	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
	<p>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>Funded by a combination of existing Local authority funds and Bus Service Improvement Plan funds</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 endeavours to provide such information.</p>				
L03	<p>Customer Support Staff:</p> <p>Staff at key interchanges in Tyne and Wear will be</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>	N/A	From the Scheme Commencement Date	N/A	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
	<p>available to support customers.</p> <p>Ambassadors will help with guiding passengers and supporting them in making travel choices.</p> <p>Funded by a combination of existing Local authority funds and Bus Service Improvement Plan funds</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>				
L04	<p>Core Network Mapping:</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>Funded by a combination of existing Local</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 6 months of the Scheme Commencement Date	N/A	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
	authority funds and Bus Service Improvement Plan funds					
L05	<p>Printable information:</p> <p>Printable information will be available online for the whole network.</p> <p>Funded by existing Local authority funds</p>	Durham, Northumberland and Nexus shall provide the relevant timetable and network information online.	N/A	From the Scheme Commencement Date	N/A	N/A
L06	<p>Logo:</p> <p>We will develop a consistent logo that will become a recognisable symbol of public transport in the North East.</p> <p>Funded by the Bus Service Improvement Plan</p>	Authorities and Operators will take an active role in the development and consultation for a new logo which will be facilitated by TNE.	N/A	Within 1 month of the Scheme Commencement Date	N/A	N/A
L07	<p>Website:</p>	Authorities and Operators will take an active role in the development and	N/A	Within 9 months of the Scheme Commencement Date	N/A	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
	<p>Network wide ticketing and journey planning will be made available to passengers through a single dedicated website and app under the as yet to be decided regional bus transport brand</p> <p>Funded by the Bus Service Improvement Plan</p>	<p>consultation for a new website which will be facilitated by TNE.</p>				
L08	<p>Bus Passenger Charter:</p> <p>TNE have provided an indicative Bus Passenger Charter in 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>	<p>NECA and NTCA will develop and write a passenger charter in consultation with all Authorities and Operators.</p>	N/A	<p>Within 1 month of the Scheme Commencement Date</p>	N/A	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
	Funded by the Bus Service Improvement Plan					
L09	<p>TNE Costs: Funding of costs in respect of additional staff and technical capabilities required.</p> <p>Funded by the Bus Service Improvement Plan</p>	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 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.	No	From the Scheme Commencement Date	N/A	N/A
L10	Additional staff at interchanges – Provide additional staff, turnaround	TNE will work with Durham and Nexus to determine the most appropriate employment	No	Within 6 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 work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
	<p>cleaners and customer support staff at identified interchanges.</p> <p>Funded by the Bus Service Improvement Plan</p>	option for additional staff members, once this has been determined staff will be employed.				
L11	<p>Community bus partnerships</p> <p>Funded by the Bus Service Improvement Plan</p>	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 6 months of the Scheme Commencement Date	N/A	
<p>ATNE01</p> <p>Delivering bus priority measures along the corridors identified in the Bus Service Improvement Plan:</p>	<p>Barrack Road and Central Motorway (A189 and A167) Corridor</p>	<p>Bus priority measures along the Barrack Road (A189) and Central Motorway (A167) at sites along the routes between Stamford Road and A167 slip road/ Claremont Road.</p> <p>Funded by the Bus Service Improvement Plan</p>	<p>Newcastle City Council will undertake design work, a business case appraisal and consultation on the delivery of works along the corridor.</p> <p>Such works could include localised road widening to allow for Bus Lanes, extensions to existing Bus Lanes and slip road space reallocations to create bus lanes as appropriate depending on the outcome of the business case appraisal, consultation</p>	Yes	Within 2 months of the Scheme Commencement Date.	September 2024

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
			responses and all other relevant considerations.			
	Coast Road (A1058) Corridor	Bus priority measures along the Coast Road (A1058) at sites along the route between Sandyford Road and Foxhunters Roundabout. Funded by the Bus Service Improvement Plan	Newcastle and North Tyneside Local Authorities will undertake design work, a business case appraisal and consultation on the delivery of works along the corridor. Such works could include junction or signal improvements to prioritise buses, Bus Lanes, slip road space reallocations and localised road widening as appropriate depending on the outcome of the business case appraisal, consultation responses and all other relevant considerations.	Yes	Within two months of the Scheme Commencement Date.	March 2025
	Westgate Road (A186) Corridor	Bus priority measures along the Westgate Road (A186) at sites along the route between Hadrian School and Elswick Road.	Newcastle City Council will undertake design work, a business case appraisal and consultation on the delivery of works along the corridor. Such works could include parking relocation to allow bus lanes and red routes as	Yes	Within two months of the Scheme Commencement Date.	November 2024

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		Funded by the Bus Service Improvement Plan	appropriate depending on the outcome of the business case appraisal, consultation responses and all other relevant considerations.			
Wallsend and Corridor (A193 B1312)	Bus priority measures along the Wallsend Corridor (A193, B1312) at sites along the route between Burnside College and New Bridge Street. Funded by the Bus Service Improvement Plan	Newcastle and North Tyneside Local Authorities will undertake design work, a business case appraisal and consultation on the delivery of works along the corridor. Such works could include parking relocation to allow bus lanes, bus lane extensions, bus priority signal implementation and junction improvements to prioritise buses as appropriate depending on the outcome of the business case appraisal, consultation responses and all other relevant considerations.	Yes	Within two months of the Scheme Commencement Date.	March 2025	
Dunston Corridor	Bus priority measures along the Dunston Corridor at sites along the route between Team Street and Askew Road Roundabout.	Gateshead Council will undertake design work, a business case appraisal and consultation on the delivery of works along the corridor.	Yes	Within two months of the Scheme Commencement Date.	November 2023	

1		2	3	4	5	6	7
Reference		Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		Funded by the Bus Service Improvement Plan	Such works could include parking relocation to allow bus lanes, bus lane extensions, bus priority signal implementation and junction improvements to prioritise buses as appropriate depending on the outcome of the business case appraisal, consultation responses and all other relevant considerations.				
	Bensham (A692 and B1426) Road Corridor	Bus priority measures along the Bensham Corridor (A692 and B1426) at sites along the route between Lobley Hill Road and Coatsworth Road. Funded by the Bus Service Improvement Plan	Gateshead Council will undertake design work, a business case appraisal and consultation on the delivery of works along the corridor. Such works could include bus only turn lanes, bus lane extensions and localised road widening to facilitate bus entry to existing bus lanes as appropriate depending on the outcome of the business case appraisal, consultation responses and all other relevant considerations.	Yes	Within two months of the Scheme Commencement Date.	July 2024	
	Leam Lane (A195) Corridor	Bus priority measures along the A195 at sites along	Gateshead Council will undertake design work, a business case appraisal and	Yes	Within two months of the Scheme	July 2023	

1		2	3	4	5	6	7
Reference		Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		<p>the route between the junction with the B1288 and then A194(M).</p> <p>Funded by the Bus Service Improvement Plan</p>	<p>consultation on the delivery of works along the corridor.</p> <p>Such works could include a new bus lane and a bus lane extension as appropriate depending on the outcome of the business case appraisal, consultation responses and all other relevant considerations.</p>		Commencement Date.		
	Old Durham Road (B1296) Corridor	<p>Bus priority measures along the B1296 at sites along the route between Whitehouse Lane to Valley Drive.</p> <p>Funded by the Bus Service Improvement Plan</p>	<p>Gateshead Council will undertake design work, a business case appraisal and consultation on the delivery of works along the corridor.</p> <p>Such works could include parking relocation to allow bus lanes, bus lane extensions and to implement bus priority signals as appropriate depending on the outcome of the business case appraisal, consultation responses and all other relevant considerations.</p>	Yes	Within two months of the Scheme Commencement Date.	July 2024	
	Chester Road (A183) Corridor	<p>Bus priority measures along the A183 at sites along the route between</p>	<p>Sunderland City Council will undertake design work, a business case appraisal</p>	Yes	Within two months of the Scheme	September 2024	

1		2	3	4	5	6	7
Reference		Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		<p>The University of Sunderland and the junction with the B1405.</p> <p>Funded by the Bus Service Improvement Plan</p>	<p>and consultation on the delivery of works along the corridor.</p> <p>Such works could include bus gates with priority signals and bus lane implementation as appropriate depending on the outcome of the business case appraisal, consultation responses and all other relevant considerations.</p>		Commencement Date.		
	A690 Corridor	<p>Bus priority measures along the A690 at sites close to Sunderland College.</p> <p>Funded by the Bus Service Improvement Plan</p>	<p>Sunderland City Council will undertake design work, a business case appraisal and consultation on the delivery of works along the corridor.</p> <p>Such works could include bus lanes implementation, bus stop relocation into the carriageway to minimise bus movement conflicts with general traffic and provision of a new access junction to provide bus priority as appropriate depending on the outcome of the business case appraisal, consultation</p>	Yes	Within two months of the Scheme Commencement Date.	September 2024	

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		responses and all other relevant considerations.				
	South Shields to Sunderland Corridor	<p>Bus priority measures along the South Shields to Sunderland Corridor at sites along the route between Westoe and Monkwearmouth Hospital.</p> <p>Funded by the Bus Service Improvement Plan</p>	<p>South Tyneside and Sunderland local authorities will undertake design work, a business case appraisal and consultation on the delivery of works along the corridor.</p> <p>Such works could include implantation of bus lanes through hatching and parking rationalisation and bus gates as appropriate depending on the outcome of the business case appraisal, consultation responses and all other relevant considerations.</p>	Yes	Within two months of the Scheme Commencement Date.	March 2024
	South Shields to Newcastle Corridor	<p>Bus priority measures along the South Shields to Newcastle Corridor at sites along the route between Boldon and Heworth.</p>	<p>South Tyneside and Gateshead Local Authorities will undertake design work, a business case appraisal and consultation on the delivery of works along the corridor.</p> <p>Such works could include signal controls with bus detection technology,</p>	Yes	Within two months of the Scheme Commencement Date.	March 2024

1		2	3	4	5	6	7
Reference		Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		Funded by the Bus Service Improvement Plan	junction realignment to improve efficiency and parking relocation to provide bus lanes as appropriate depending on the outcome of the business case appraisal, consultation responses and all other relevant considerations.				
	Blyth (A193) Corridor	Bus priority measures along the A193 off-slip. Funded by the Bus Service Improvement Plan	Northumberland County Council will undertake design work, a business case appraisal and consultation on the delivery of works along the corridor. Such works could include localised widening to implement a bus lane and a bus gate as appropriate depending on the outcome of the business case appraisal, consultation responses and all other relevant considerations.	Yes	Within two months of the Scheme Commencement Date.	TBC	
	Cramlington Corridor	Bus priority measures along the Cramlington Corridor at sites along the route between Durham Road Roundabout	Northumberland County Council will undertake design work, a business case appraisal and consultation on the delivery of works along the corridor.	Yes	Within two months of the Scheme Commencement Date.	TBC	

1		2	3	4	5	6	7
Reference		Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		and Dudley Lane Roundabout. Funded by the Bus Service Improvement Plan	Such works could include localised widening to implement bus only roundabout bypasses, introduction of bus priority signals and removal of pedestrian guard rails to speed up boarding times as appropriate depending on the outcome of the business case appraisal, consultation responses and all other relevant considerations.				
	A188/A189 Corridor	Bus priority measures along the A188/A189 Corridor at sites along the route between Benton Lane and Four Lane Ends Bus and Metro Interchange. Funded by the Bus Service Improvement Plan	North Tyneside Council will undertake design work, a business case appraisal and consultation on the delivery of works along the corridor. Such works could include bus lanes on approach to bus interchange, bus priority signals and lane narrowing to provide bus lanes as appropriate depending on the outcome of the business case appraisal, consultation responses and all other relevant considerations.	Yes	Within two months of the Scheme Commencement Date.	March 2025	

1		2	3	4	5	6	7
Reference		Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
	Durham Corridor (A167)	<p>Bus priority measures along the A167 at sites along the route between Coundon Gate Roundabout and Kell's Lane.</p> <p>Funded by the Bus Service Improvement Plan</p>	<p>Gateshead and Durham Local Authorities will undertake design work, a business case appraisal and consultation on the delivery of works along the corridor.</p> <p>Such works could include localised widening to provide bus only roundabout bypass, bus priority signals and general traffic lanes reallocated to bus only lanes as appropriate depending on the outcome of the business case appraisal, consultation responses and all other relevant considerations.</p>	Yes	Within two months of the Scheme Commencement Date.	March 2025	
	Seaton Burn (B1318) Corridor	<p>Bus priority measures along the B1318 at sites along the route between the Great North Road Flyover and Gosforth High Street.</p> <p>Funded by the Bus Service Improvement Plan</p>	<p>Newcastle City Council will undertake design work, a business case appraisal and consultation on the delivery of works along the corridor.</p> <p>Such works could include bus lane extensions, making key link roads bus only and providing new bus lanes by rationalising central</p>	Yes	Within two months of the Scheme Commencement Date.	September 2024	

1		2	3	4	5	6	7
Reference		Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
			hatching as appropriate depending on the outcome of the business case appraisal, consultation responses and all other relevant considerations.				
ATNE02	Tranche 2 Bus Priority Infrastructure Schemes	<p>Bus Priority Measures across the region as promoted by Local Authority and bus operator partners. These schemes respond to bus delays not identified in the corridors covered by ATNE01.</p> <p>These include schemes that respond to the renewed ambition of the BSIP as well as changing post pandemic travel patterns and new and future developments.</p> <p>Funded by the Bus Service Improvement Plan</p>	<p>Local Authorities in the Region will develop and deliver works subject to design work, consultation and business case appraisal outcomes.</p> <p>Expected works could include lane reallocation to create bus lanes, junction upgrades, vehicle detection loops and on-street parking relocation.</p>	Yes	Within two months of the Scheme Commencement Date.	March 2025	

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
Springwell Inn Northbound	Bus Priority Measures on Springwell Inn junction, northbound. Funded by the Bus Service Improvement Plan	Gateshead Council will undertake design work, a business case appraisal and consultation on the delivery of works on this stated intervention. Expected works could include widening the junction to provide a bus lane.	Yes	Within 2 months of the Scheme Commencement Date.	March 2024	
Gateshead Town Centre	Bus Priority Measures in Gateshead Town Centre. Funded by the Bus Service Improvement Plan	Gateshead Council will undertake design work, a business case appraisal and consultation on the delivery of works on this stated intervention. Expected works could include signal phasing reviews.	Yes	Within 2 months of the Scheme Commencement Date.	March 2025	
A694 Swalwell Bridge.	Bus Priority Measures on the A694, close to Swalwell Bridge. Funded by the Bus Service Improvement Plan	Gateshead Council will undertake design work, a business case appraisal and consultation on the delivery of works on this stated intervention. Expected works could include bus lane extensions.	Yes	Within 2 months of the Scheme Commencement Date.	March 2025	
Parking review	Local Authorities will review and	Local Authorities will review parking	Yes	Within 2 months of the Scheme	March 2025	

1		2	3	4	5	6	7
Reference		Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		<p>consider the reallocation of parking where there is potential that they conflict with bus movements.</p> <p>Funded by the Bus Service Improvement Plan</p>	<p>arrangements where they conflict with bus movements. Final details are subject to design work, a business case appraisal and consultation on the proposals.</p> <p>Reviews could be taken out in the following locations: Marsden, Brockley Whins, Coxhoe, Cornforth Lane, Richardson Road/St. Thomas Street, Kells Lane, Durham Road, Prince Consort Road and Harewood Crescent (Earsdon Grange).</p>		Commencement Date.		
ATNE03		<p>Safe and Accessible bus infrastructure - Updates and where necessary renewals of waiting bus infrastructure which does not meet current accessibility and safety standards, and which, as a consequence is a barrier to patronage.</p>	<p>TNE will work with Local Authorities and Nexus to produce a programme of bus 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.</p>	No	Within 3 months of the Scheme Commencement Date	March 2025	

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
	Funded by the Bus Service Improvement Plan					
ATNE04	Maintenance of existing bus facilities. Funded by existing Local Authority budgets.	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 TRO detailed in the third column	No further TROs	From the Scheme Commencement Date	N/A	
ATNE05	Reinvestment in the EP Scheme Area of Operator savings derived directly from this EP Scheme. Funded by the Bus Service Improvement Plan	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	No	From the Scheme Commencement Date	N/A	(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 (2) implementation of reinvestment of Operator savings by Operators as directed and required by

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		EP Scheme as required in order to implement such reinvestment.				Authorities and/or TNE, each as referred to at reference OPR01 in the table in paragraph 1.3 of Schedule 3.
P&R01	P&R - Major Park and Ride site(s) from a shortlist of proposals, selected subject to business case appraisal. Funded by the Bus Service Improvement Plan	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	From the Scheme Commencement Date	March 2025	N/A
P&R02	Pocket P&R - Proposed package of strategically placed, micro Park and Ride sites to make it easier for people to join the bus network.	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	No	From months of the Scheme Commencement Date	March 2024	

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
	<p>Sites will be identified by Local Authorities in both suburban and rural areas.</p> <p>Funded by the Bus Service Improvement Plan</p>	<p>subject to final design, planning applications or other land consents which may be required and consultation outcomes and business case appraisal.</p>				
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</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	N/A	From 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</p>

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
	<p>scheme and any other such schemes required.</p> <p>Funded by the Bus Service Improvement Plan</p>					<p>to in this F&T01, provision by Operators of the ticketing products referred to in Annex 2 of this Schedule 2,</p> <p>each as referred to at reference OPT02 in the table in paragraph 1.2 of Schedule 3.</p>
F&T02	<p>Care Experienced ticketing product - Provide a smart annual season ticket for young adults up to the age of 25 who have left the care system.</p> <p>Funded by the Bus Service Improvement Plan</p>	TNE will facilitate the bulk purchase of season tickets for distribution via the Local Authorities to the eligible individuals.	No	Within 1 month of the Scheme Commencement Date	N/A	
F&T03	<p>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.</p>	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 18 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 work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
	Funded by the Bus Service Improvement Plan					
Serv01	LTA secured services budgets Funded by existing Local Authority budgets.	Northumberland, Durham and Nexus will maintain the secured bus service and concessionary travel budgets for the duration of the EP at a minimum of the actual spend in FY2022/23 excluding LTF funding.	No	From the Scheme Commencement Date	N/A	N/A
Serv02	Bus service improvements Funded by the Bus Service Improvement Plan	Northumberland, Durham and Nexus will introduce service improvements and enrich the network where following the network review there is demand and/or there is limited access to bus services and these services support the objectives of the BSIP.	No	Within 6 months of the Scheme Commencement Date	N/A	
Serv03	New bus services Funded by the Bus Service Improvement Plan	Northumberland, Durham and Nexus will introduce new bus services where following the network review there are currently no bus services and a potential market exists and these services support the objectives of the BSIP, for example to tourist sites.	No	Within 6 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 work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
Serv04	DRT service(s) Funded by the Bus Service Improvement Plan	TNE will support Northumberland, Durham and Nexus to develop and deliver a DRT service(s) in the region subject to final business case appraisal.	No	Within 9 months of the Scheme Commencement Date	N/A	
Serv05	Code of Conduct – consultation over service changes: NEJTC have provided an indicative Code of Conduct in Annex 1 of this Schedule 2, which will be developed through consultation with Authorities and Operators. The Code of Conduct will set out a management process for making changes to or on the bus network. Funded by the Bus Service Improvement Plan	NECA and NTCA will develop the Code of Conduct in consultation with all Authorities and Operators.	No	Within 1 month of the Scheme Commencement Date	N/A	N/A

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
Serv06	Promotion of concessionary travel Funded by the Bus Service Improvement Plan and bus operator existing budgets.	TNE will work with Durham, Northumberland, Nexus and Operators to promote concessionary travel through: (1) targeted marketing campaigns; (2) development and delivery of schemes; and (3) working with key stakeholders and community groups, to make persons eligible for concessionary travel aware of such eligibility.	No	From the Scheme Commencement Date		(1) Operators working with Durham, Northumberland, Nexus and TNE in relation to the promotion of concessionary travel as referred to in this Serv06, as referred to at reference OPR02 in the table in paragraph 1.2 of Schedule 3.
Serv07	Marketing Funded by the Bus Service Improvement Plan	TNE shall undertake marketing campaigns to promote Facilities and Measures introduced under this Scheme including: (1) new and enhanced bus services including those referred to at references Serv01, Serv02 and Serv03 in this Schedule 2; and (2) the ticketing products referred to at references	No	From the Scheme Commencement Date	N/A	Introduction of the relevant Facilities and Measures to be marketed

1	2	3	4	5	6	7
Reference	Scheme Name and Description	Authority Responsibilities	Required TROs	Date from which work on the Facility or Measure is to be started by	Date from which work on the Facility or Measure is to be delivered by	Dependency
		F&T01 and F&T02 in this Schedule 2				

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

Interchanges	"Key" interchanges
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:

Interchanges	"Key" interchanges
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:

Interchanges	"Key" interchanges
Blyth	
Hexham	
Morpeth	
Ashington	
Alnwick	
Berwick	

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

Authority	Details of staff provided
County Durham	<ul style="list-style-type: none"> Facilities management staff for cleaning toilets, passenger concourse etc. at main bus stations (Durham, Consett, Stanley and Peterlee) New Durham bus station will have customer facing staff in core hours on completion of rebuilding (due 2023)
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:

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

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

Information at interchanges:

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

Printed information on core network:

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

ANNEX 1: INDICATIVE CODE OF CONDUCT

Defined Terms

“**LA/PTE**” Local Authority/ Public Transport Executive, in the EP area this applies to Durham County Council, Northumberland County Council and Nexus

“**Partnership Board**” The North East Bus Partnership Board will provide governance to the North East bus Enhanced Partnership

“**Local Bus Board**” Local partnership boards for each Local Authority area within the EP Scheme Area, which 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.

“**LTA**” Local Transport Authority, in the EP area this refers to The Joint Transport Committee who delegate their powers for secured bus services out to the LA/PTE as defined above.

Introduction

The North East Bus Service Code of Conduct has been drafted between the region’s bus operators and local authorities as well as Transport North East (TNE) and Nexus. The Code of Conduct responds to issues raised during public and stakeholder consultation regarding the current process of bus services changes. This code introduces a consistent standard to ensure network changes can be made in an orderly manner and communities and bus users are adequately consulted with.

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, which are agreed annually with the LA/PTE, 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 a bus operator does not need to give advanced notice of changes, beyond the statutory requirements. This may be when a change will be beneficial to the bus network and therefore passengers, or when the affected LA/PTE and operator agree that a change is either immaterial or required, for example, to meet the requirements of a traffic regulation order.

The LA/PTE may also choose not to raise changes with Bus Boards, if they consider changes to be so minor and immaterial that the impact on passengers will be negligible.

- T-18 weeks – An operator determines the need to make a network change and submits initial proposals in writing to the appropriate LA/PTE, including Transport North East. The relevant bus board or boards are also identified so that changes can be communicated to elected members via correspondence from the local authority. 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 Bus Board Chair to consider if the change(s) merits raising with the wider Local Bus Board. Any data requests, in line with section 6C of the Transport Act 1985, are to be made to operators at this time with the data provided as soon as is practicable for the LA/PTE to prepare feedback.

- T-15 weeks (latest) – Feedback on proposals to be sent to operators from LA/PTE [*It is expected that operators and LTAs communicate during this period to work through the proposals*]
- T-13 weeks – Plans, having taken into account initial feedback from 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 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 and the general public via “drop in” sessions as appropriate.
- T-11 weeks – 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. If changes affect multiple local authorities’ officers should attend all local bus board meetings to provide members with the full proposal. T-11 to T-6 week period is used to make any final amendments to aforementioned changes.
- T-10 weeks – Final registration draft copies are supplied to each relevant LA/PTE, encapsulating any feedback received to date. Based on the type of change taking place, the LA/PTE can invoke any data requests as per the Bus Services Act 2017.
- T-8 weeks – No further data or service amend requests can be provided beyond this date unless agreed critical. LA/PTE to ensure that relevant proformas are provided as soon as practical after this date and not unduly withheld.
- T-6 weeks – Services registered and 6-week period is used to promote network changes. Promotion to be undertaken by operators and the LA/PTE 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 weeks¹ – 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+1, best endeavours will be used to have updates completed by T-0.
- T-0 weeks – Changes, as agreed by all appropriate bodies in the weeks prior, go live.

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

ANNEX 2: TICKETING PRODUCTS

Part a: Children's single fare product

A uniform single fare product available for passengers aged between 5 and 16 years (inclusive) which is accepted by Operators on all local bus services operating in the administrative areas of the NECA and the NTCA.

Part b: Under 22 single fare product

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

Part c: Under 22 multimodal capped one day fare product

A capped all day fare product which is available for passengers aged between 5 and 21 years (inclusive) 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 aged 22 or over 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

Reference	Authority	Title of Order
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 Gyrotory) 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**

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
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	From 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	From the Scheme Commencement Date	

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
OP03	<p>Real Time Information:</p> <p>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 3 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>

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>Smart Card:</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	From the Scheme Commencement Date	
OPT02	<p>Ticketing Products:</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&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	From 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&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.
OPR02	Promotion of concessionary travel:	All local services within the EP Scheme Area excluding services stated in Section 5 of this EP Scheme	From the Scheme Commencement Date	Durham, Northumberland, Nexus and/or TNE (as applicable)

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
	<p>Operators shall work with Durham, Northumberland, Nexus and TNE to promote concessionary travel through:</p> <p>(1) targeted marketing campaigns;</p> <p>(2) development and delivery of schemes; and</p> <p>(3) working with key stakeholders and community groups,</p> <p>to make persons eligible for concessionary travel aware of such eligibility.</p>			<p>working with Operators regarding the promotion of concessionary travel, as referred to at reference Serv06 in the table in Schedule 2.</p>

North East Joint Transport Committee

Date: 21 March 2023

Subject: Transforming Cities Fund Tranche 2 – Grant Funding Agreements

Report of: Managing Director, Transport North East.

Executive Summary.

This report seeks Joint Transport Committee approval to allocate, in total **£12,125,506** of funds from the Transforming Cities Fund (TCF) Devolved Pot, following successful appraisal of Business Cases, in accordance with the North East Transport Assurance Framework, to the following schemes:

- Gateshead Council, Metro Green Sustainable Access (GA05) totalling up to **£2,553,025** of TCF funds
- Newcastle City Council, Transforming Newcastle City Centre (NE01) totalling up to **£6,169,081** of TCF funds
- Newcastle City Council, Newcastle Streets for People (NE08) totalling up to **£3,403,400** of TCF funds

Recommendations

The North East Joint Transport Committee is recommended to:

- i. Approve the following schemes: Metro Green Sustainable Access (GA05), Transforming Newcastle City Centre (NE01) and Newcastle Streets for People (NE08) and release the associated **£12,125,506** of funds from the Transforming Cities Fund (TCF) Devolved Pot to enable the schemes to commence.
- ii. Instruct officers to prepare and sign Grant Funding Agreements with both Gateshead Council and Newcastle City Council for the delivery of the following schemes: Metro Green Sustainable Access (GA05), Transforming Newcastle City Centre (NE01) and Newcastle Streets for People (NE08).

1. Background Information

- 1.1 In March 2020 the North East region was awarded £198m from the Government's Transforming Cities Fund to aid the delivery of sustainable transport capital measures. In total, £94m of this funding is allocated to the Nexus led Metro Flow scheme, with the remaining £104m allocated to the region to spend on smaller sustainable transport schemes.
- 1.2 A programme of schemes was considered by this Committee in May 2020, and the local authority promoters of those schemes have since been advancing the design of their schemes and preparing Business Cases for investment.
- 1.3 As they come forward, the Business Case for each scheme in the programme is considered using the regionally agreed Transport Assurance Framework and reviewed by an independent consultant retained by Transport North East (TNE) to ensure:
- the level of analysis undertaken by the scheme promoter is appropriate to the size of the scheme;
 - the scheme gives good value for public money;
 - the risks associated with delivery of the scheme have been identified and where possible mitigated; and
 - the appropriate governance and procurement processes are in place to complete the scheme in-line with DfT's grant funding conditions.
- 1.4 Once successfully appraised, schemes will come forward for sign off and approval at an appropriate meeting of the JTC which will enable the North East Combined Authority (NECA) to enter into a Grant Funding Agreement (GFA) with the scheme promoter, once signed the GFA gives the scheme promoter permission to draw down the funding allocation associated with the approved scheme from the TCF Devolved Pot which is held by NECA on behalf of the JTC.

2. Proposals

- 2.1 Business Cases for the following schemes: Metro Green Sustainable Access (GA05), Transforming Newcastle City Centre (NE01) and Newcastle Streets for People (NE08) have now come forward and have been considered in accordance with the region's Transport Assurance Framework, with appraisal being conducted by Transport North East's retained assurance consultants.
- 2.2 Appraisal has shown that each scheme possesses a strong strategic case, offers value for money, and has a viable delivery programme. This report therefore recommends the following schemes: Metro Green Sustainable Access (GA05), Transforming Newcastle City Centre (NE01) and Newcastle Streets for People (NE08) for approval by the Committee. The TCF funds associated with the aforementioned schemes totals **£12,125,506**.

2.3 JTC approval will enable NECA to enter into a Grant Funding Agreement (GFA) with both Gateshead Council and Newcastle City Council for the delivery of their respective schemes and enable each Council permission to draw down the associated funding allocation from the TCF Devolved Pot, which is held by NECA on behalf of the JTC.

3. Reasons for the Proposals

3.1 Following the successful appraisal of the following schemes: Metro Green Sustainable Access (GA05), Transforming Newcastle City Centre (NE01) and Newcastle Streets for People (NE08) approval is sought from JTC, once granted this will enable each scheme to commence delivery. The approval and onwards delivery of schemes will contribute to the delivery of our Transforming Cities Fund programme, which in turn will contribute to delivery of the objectives outlined within the North East Transport Plan, an overview of each scheme and its associated benefits is outlined at **Appendix 1**.

4. Alternative Options Available

4.1 As part of the Business Case development for each scheme proposed for approval, a range of delivery options were assessed against value for money, risk and deliverability considerations in line with the Transport Assurance Framework. Preferred options were selected and progressed on the understanding that the approach detailed within the Business Case offers the best mix of benefits offset against a comparably lower level of delivery risk. The Business Case for each scheme demonstrates why the chosen solution provides the best options in terms of meeting passenger needs whilst also providing value for public money.

4.2 Two options are presented to the North East Joint Transport Committee.

4.3 Option 1 – The North East Joint Transport Committee accept the recommendations set out in this report, approving the following schemes:

- Gateshead Council, Metro Green Sustainable Access (GA05) totalling up to **£2,553,025** of TCF funds
- Newcastle City Council, Transforming Newcastle City Centre (NE01) totalling up to **£6,169,081** of TCF funds
- Newcastle City Council, Newcastle Streets for People (NE08) totalling up to **£3,403,400** of TCF funds

Releasing the associated **£12,125,506** of funds from the TCF Devolved Pot and enabling the schemes to commence.

4.4 Option 2 - The North East Joint Transport Committee do not accept the recommendations set out in this report, in which case the schemes outlined in this report and in **Appendix 1** will be unable to commence delivery and the benefits detailed within the Business Cases of the schemes will not be realised.

Consequently the North East Transforming Cities Fund programme would be likely to underspend.

4.5 Option 1, is the recommended option.

5. Next Steps and Timetable for Implementation

5.1 Grant Funding Agreements will be prepared by officers for the following schemes: Metro Green Sustainable Access (GA05), Transforming Newcastle City Centre (NE01) and Newcastle Streets for People (NE08) these will be subsequently agreed with Gateshead Council and Newcastle City Council as scheme promoters and signed, thereafter delivery and construction will commence. TNE will require that both Gateshead Council and Newcastle City Council provide quarterly monitoring update reports on the aforementioned schemes that will detail progress, expenditure, and risks.

6. Potential Impact on Objectives

6.1 The schemes detailed within this report will contribute positively to the high-level strategic objectives in both the regional Strategic Economic Plan and the North East Transport Plan. An overview of the benefits derived from each scheme is provided at **Appendix 1**.

7. Financial and Other Resources Implications

7.1 In total, the TCF allocation covered by this report amounts to **£12,125,506**. Should the recommendations of this report be accepted by JTC, a summary of the TCF Devolved Pot can be updated as follows:

- Total available TCF Funds (exc. Metroflow): **£103,797,532**
- Funds Committed prior to this report: **£89,044,395**
- Funds Committed as a result of the report: **£12,125,506**
- Remaining Devolved Pot: **£2,627,631**

7.2 There are no Human Resources or ICT implications arising from the recommendations of this report.

8. Legal Implications

8.1 Grant Funding Agreements are required in order to enable the scheme promoters permission to commence drawing down the funding allocation associated with each individual scheme. A standard Grant Funding Agreement template has been prepared for all TCF schemes that is utilised to minimise any legal risks and ensure NECA's obligations (on behalf of the JTC) to the Department for Transport in regards to the TCF devolved funding are met, these obligations are appropriately transferred to each scheme promoter through the Grant Funding Agreement.

9. Key Risks

- 9.1 The key risk for this Committee relates to the potential for the construction of these schemes to be delayed or overspent. The funding mechanism included within each Grant Funding Agreement ensures that risks to the Committee are appropriately mitigated, transferred, and borne by each scheme promoter.

10. Equality and Diversity

- 10.1 All schemes have been designed to modern standards and are compliant with appropriate legislation, ensuring that any equality and diversity implications are minimised.

11. Crime and Disorder

- 11.1 All schemes have been designed to modern standards, appropriate consultation with statutory consultees has taken place throughout the course of scheme designs, ensuring that any crime and disorder implications will be minimised.

12. Consultation/Engagement

- 12.1 This report has been shared with the Transport Strategy Board, comments have been taken on board and integrated into this report. The scheme promoters have managed all consultation requirements pertaining to each individual scheme.

13. Other Impact of the Proposals

- 13.1 Each scheme Business Case outlines in detail the transport benefits derived from each specific intervention covered by the scheme, however, in addition, the approval of these schemes are likely to generate substantial wider economic benefits and improve linkages to employment centres within the region.

14. Appendices

- 14.1 Appendix 1 – Scheme Details

15. Background Papers

- 15.1 North East Transport Assurance Framework: [NORTH EAST JOINT TRANSPORT COMMITTEE \(transportnortheast.gov.uk\)](https://transportnortheast.gov.uk)

16. Contact Officers

- 16.1 Jonathan Bailes, Transport Programme Lead
E-mail: jonathan.bailes@transportnortheast.gov.uk

17. Sign off

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

- Chief Finance Officer: ✓

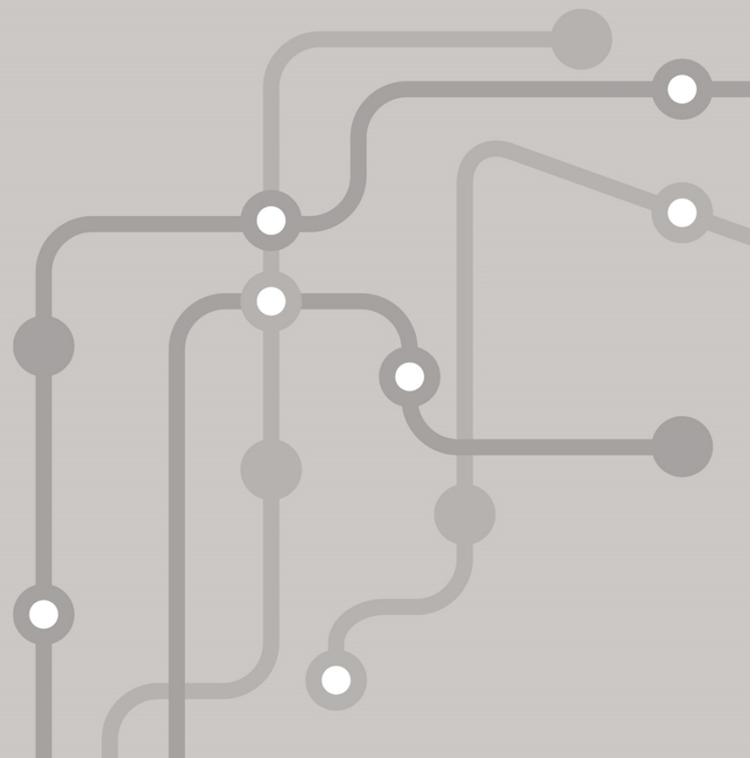
18. Glossary

- DfT – Department for Transport
- TCF Devolved Pot – the Transforming Cities Fund allocation from DfT that is available to spend on the prioritised schemes identified in our November 2019 TCF Strategic Outline Business Case submission
- Grant Funding Agreement – outlines the terms and conditions under which a scheme will be delivered, and constitutes the contract between NECA and the scheme promoter for the delivery of the scheme
- Transport Assurance Framework – a framework for business case development and review that ensures good decision making, procurement and governance is in place for all projects, for schemes that can demonstrate good value for public money
- NECA – North East Combined Authority
- TNE – Transport North East

Transport **North East**

Appendix 1

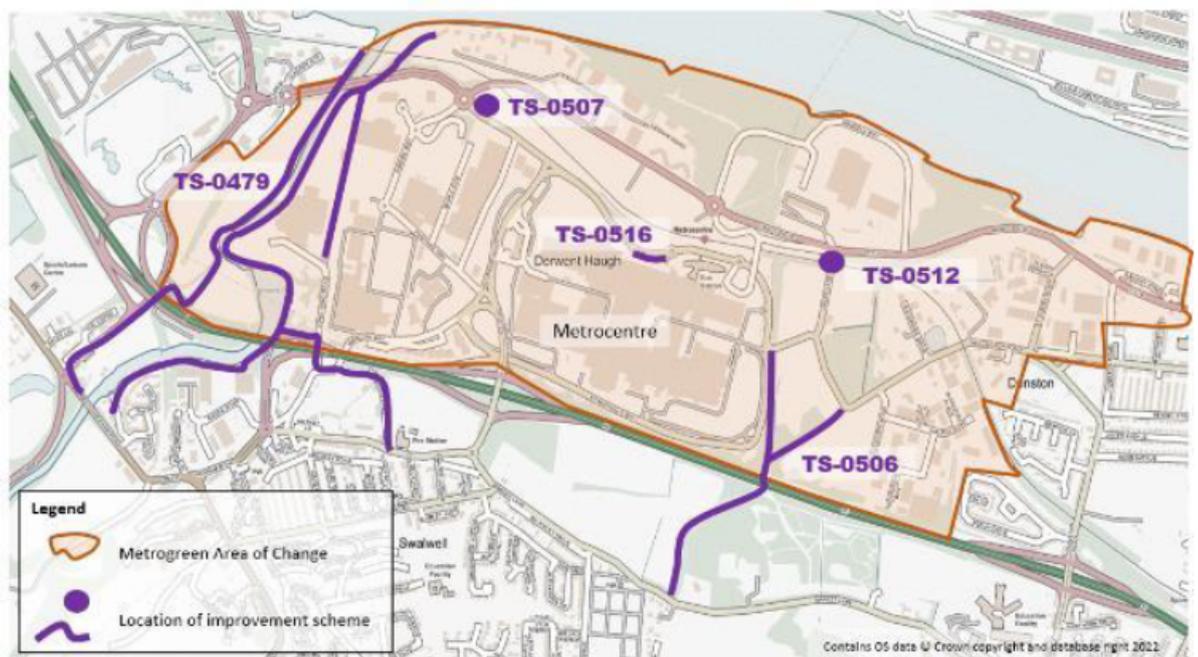
Scheme Details



1. Overview of schemes seeking approval

1.1 The tables below provide an overview of the schemes that are recommended for approval at the March 2023 Meeting of the Joint Transport Committee.

<p>Scheme: Metrogreen Sustainable Access (GA05)</p>
<p>Description: The Metrogreen scheme will provide a range of new and improved walking and cycling facilities, alongside providing improved conditions for buses. The aim of this scheme is to deliver the environment required to establish and maintain sustainable travel as a key feature of the Metrogreen growth area. The extent of the scheme is shown in the diagram below and includes approximately 5km of upgraded high-quality pedestrian and cyclist provision, enhanced crossing facilities across Scotswood View, and the extension of the westbound bus lane along Scotswood View, which will allow for unhindered access for westbound bus services from the Metrocentre bus interchange. The scheme will provide continuous and improved pedestrian and cyclist connections around the Metrogreen area.</p>
<p>TCF Allocation: £2,553,025</p>
<p>Benefits that will be achieved: Benefits from the scheme include reduced levels of congestion in the area due to reduced bus delays, increased bus usage from improved bus reliability and punctuality, improved access to employment, improved air quality, and reduced carbon emissions. A key scheme objective is to reduce delays to buses in the Metrogreen area, as a result of the improved bus lane provision near the Metrocentre bus interchange. It is envisaged that the scheme will result in an increase of up to 20% of active mode trips comparative to the number of trips at present.</p>

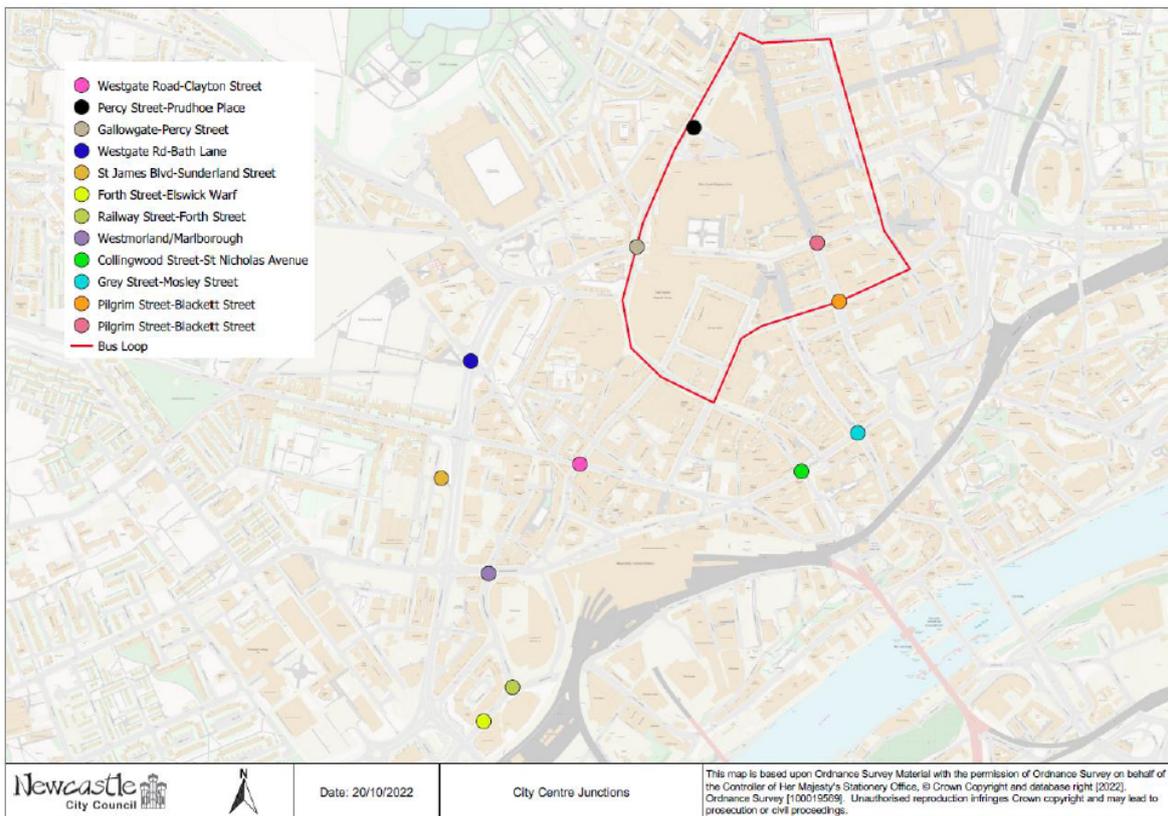


Scheme: Transforming Newcastle City Centre (NE01)

Description: This scheme delivers a number of interventions throughout Newcastle City Centre, including signal and junction upgrades, alongside the provision of new infrastructure for cyclists. The scheme aims to improve air quality and congestion, through the provision of upgraded signals, allowing for improved flow of buses within the centre of Newcastle. The diagram below highlights the signals which will be receiving upgrades, allowing for connections to the Urban Traffic Management and Control centre. The scheme also includes a new signal and junction arrangement at the Percy Street / Blackett Street / Newgate Street / Gallowgate junction. Cycle infrastructure will be introduced on Percy Street and Leazes Park Road, and Grey Street will be pedestrianised northbound, with buses operating southbound.

TCF Allocation: £6,169,081

Benefits that will be achieved: Benefits from the scheme will include improved bus journey times, increased active travel mode share, reduction in carbon emissions, and improvements to local air quality in the city centre. A key target for the scheme is improving bus punctuality to 95% for services on corridors where investments are focussed.



Scheme: Newcastle Streets for People (NE08)

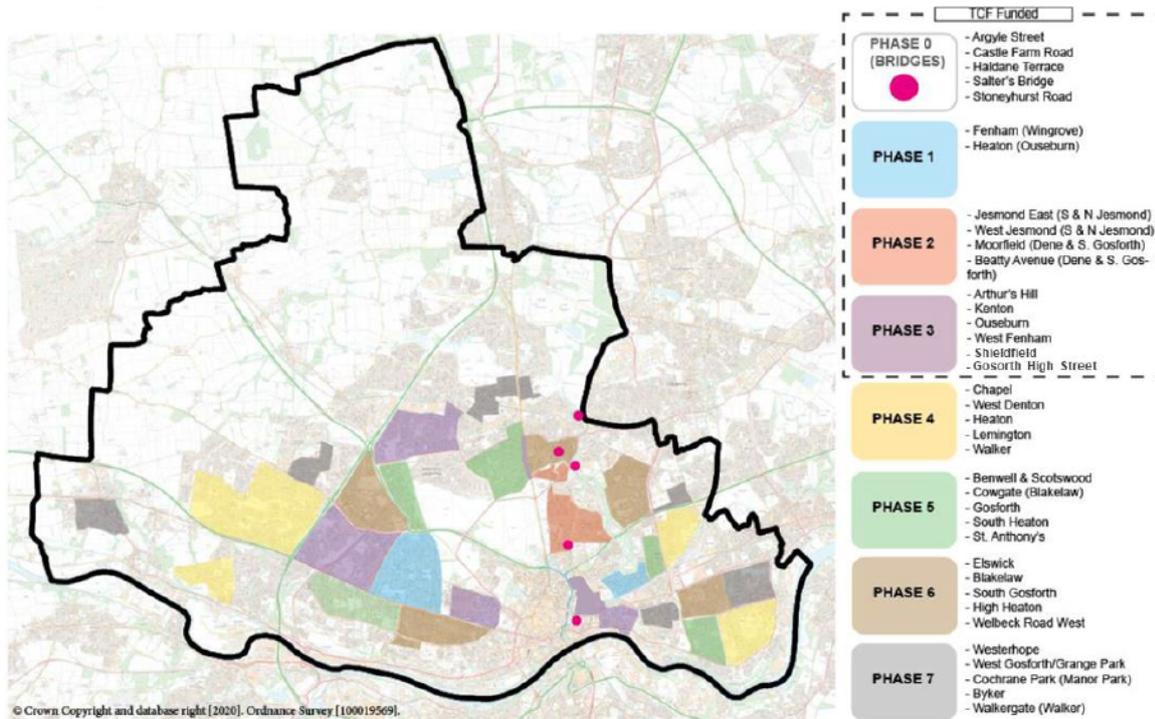
Description: The scheme will target twelve neighbourhood areas across Newcastle and will implement measures to make them safer and more attractive, encouraging people to spend more time outdoors. The twelve neighbourhoods to be funded are: Fenham, Heaton, Jesmond East, West Jesmond, Moorefield,

Beatty Avenue, Arthur’s Hill, Kenton, Ouseburn, West Fenham, Shieldfield, and Gosforth High Street. These are shown in phases 1-3 in the diagram below. Measures within these neighbourhoods will include school street restrictions; provision of shared space; footway widening and surface replacement; installation of bollards, dropped kerbs and double yellow lines; junction tightening with provision of raised crossings; provision of Toucan crossings; and modal filters.

TCF Allocation: £3,403,400

Benefits that will be achieved:

Benefits of the scheme include increased uptake in walking and cycling within these neighbourhoods, improved cyclist and pedestrian safety, and improved connectivity for sustainable modes. It is envisaged that the scheme will result in an increase of walking by up to 10% and cycling by up to 19% in the 12 neighbourhoods benefiting from this scheme.



North East Joint Transport Committee

Date: 21 March 2022
Subject: JTC Revenue Budget Update
Report of: Chief Finance Officer

Executive Summary

The JTC agreed its revenue budget for 2023/24 and revised budget / outturn forecast for 2022/23 at its meeting on 17 January 2023.

Subsequent to the preparation of the reports for the meeting, announcements were received about the receipt of revenue grant funding which Transport North East will administer on behalf of the region.

This report seeks agreement to update the budget for 2022/23 and 2023/24 for these grants to enable use of the funding to commence without delay. The proposals in this report do not affect the Transport Levies agreed at the meeting on 17 January 2023 and subsequently endorsed by the NECA Leadership Board and NTCA Cabinet.

The Active Travel Capability Fund (£1.414 million) will provide revenue funding for design and engagement on a range of active travel infrastructure schemes and the delivery of a region-wide programme of training, information and e-bike trials. It is forecast that £0.236 million will be defrayed in 2022/23 and £1.170 million will be defrayed in 2023/24.

The City Region Sustainable Transport Settlement (CRSTS) revenue grant (£5.682 million in 2022/23, £2.841 million in 2023/24 and £2.841 million in 2024/25) supports the delivery of the CRSTS capital programme in addition to building transport planning and delivery capacity. It is proposed that in the first instance revenue funding is utilised to develop, assure and manage the CRSTS programme. In terms of the initial allocation it is forecast that £0.293 million will be defrayed in 2022/23 and £6.187 million will be defrayed in 2023/24.

Recommendations

The North East Joint Transport Committee is recommended to:

- i) Agree the inclusion of the Active Travel Capability Fund grant and City Region Sustainable Transport Settlement revenue grant in the JTC revenue budget for 2022/23 and 2023/24.

1. Background Information

1.1 The JTC agreed its revenue budget for 2023/24 and revised budget for 2022/23 at its meeting on 17 January 2023.

1.2 Subsequent to the preparation of the reports for this meeting, announcements were received about the receipt of revenue grant funding which Transport North East will administer on behalf of the region. This report provides an update to the budget for 2022/23 and 2023/24 to allow delivery to commence.

2. Proposals

Active Travel Capability Fund

2.1 In early January 2023, Active Travel England (ATE) launched the Active Travel Capability Fund and announced that the North East region would receive its full £1.414m allocation. This one year revenue settlement will fund design and engagement on a range of active travel infrastructure schemes as set out in the North East Transport Plan, Active Travel Strategy and Local Cycle and Walking Infrastructure Plans. It will also see the delivery of a region-wide programme of training, information and trials of e-bikes across the region brought together under the Go Smarter Go Active initiative.

2.2 The programme of activity was devised with input from each Local Authority and will see grant funding allocated towards:

- Updating or finalising 17 Local Cycling and Walking Infrastructure Plans;
- Advancing the design and engagement of 39 active travel schemes, taking forward a pipeline for future capital funding;
- Delivering a package of cycle training across all age groups regionwide, including e-bike training;
- Upgraded secure city centre parking;
- Grants available for cycle parking and facilities at workplaces;
- Trials of cargo bikes in the community and cycle hire facilities at stations; and
- Training around active travel design guidance.

2.3 Transport North East is working closely with Local Authority partners in the delivery of the programme, with funding expected to be committed and ideally spent over the course of the next 12 months.

2.4 The proposed use of the £1.414m grant is shown in the table below.

Table 1: Active Travel Capability Fund

Measure	Total Grant
	£m

Local Cycling and Walking Infrastructure Plans	0.099
Scheme planning and design	0.940
Public engagement and consultation	0.038
Data and evidence collection	0.040
Bespoke training for LA officers and members	0.020
Organisational travel planning and engagement	0.031
Grants	0.029
Cycle Training	0.099
Cycle Loan and Share Schemes	0.017
Cycle maintenance training	0.008
Cycle security measures	0.010
Active travel communications/marketing	0.083
Total	1.414

City Region Sustainable Transport Settlement

- 2.5 Following the recent agreement of the minded-to devolution deal with Government, the region has received £5.682m City Region Sustainable Transport Settlement revenue grant from the Department for Transport.
- 2.6 Revenue funding is provided to support the delivery of the CRSTS capital programme. The payment of £5.682m is the first of three covering financial years 2022/23 (£5.682m), 2023/24 (£2.841m) and 2024/25 (£2.841m).
- 2.7 Use of the revenue funds is restricted to supporting the development of the CRSTS capital programme and building long-term local transport planning and delivery capacity. It must only be used for transport purposes and should not be spent on any activity which is already funded.
- 2.8 It is proposed that the revenue funding is utilised to:
- Develop the CRSTS programme – including procuring support to produce the business case required to unlock capital funds and develop the schemes that will form the CRSTS programme;
 - Assure the CRSTS programme – providing consultancy support to scrutinise schemes and meet assurance framework associated costs;
 - Manage the CRSTS programme – resource for programme management and oversight of the delivery of the CRSTS programme.

2.9 It is important that TNE work at pace on behalf of the JTC to progress both the business case required to unlock CRSTS capital funds and to develop the schemes which will sit within the CRSTS programme to the point that they are capable of delivering upon a Mayor coming into office in May 2024. It is therefore proposed that CRSTS revenue funding is prioritised as follows:

	2022/23	2023/24	2024/25	Total
	£m	£m	£m	£m
Programme level business case for CRSTS	0.110	0.990	0.000	1.100
Scheme level business case development	0.183	3.477	0.000	3.660
Programme Management, Assurance, Monitoring and Evaluation	0.000	1.320	0.660	1.980
Metro Expansion – South of Tyne and Wear Loop Outline Business Case	0.000	0.400	0.000	0.400
Total	0.293	6.187	0.660	7.140

2.10 The total amount of CRSTS revenue funding which will be paid to the North East over the three-year period is £11.364m (£5.682m received so far with two further payments of £2.841m). The above proposals seek to allocate £7.140m of the CRSTS funding. Further proposals will therefore be brought forward for the balance of remaining CRSTS revenue funds (£4.220m) at the appropriate stage of need and development.

Summary

2.11 *Table 3: Summary of amendment to 2022/23 and 2023/24 JTC Revenue Budget*

	2022/23 Revised Budget	2023/24 Budget	Total
	£m	£m	£m
Capability Fund	0.236	1.178	1.414
CRSTS Revenue	0.293	6.187	6.480
Total	0.529	7.365	7.894

3. Reasons for the Proposals

3.1 This report is to update the JTC budgets for 2022/23 and 2023/24.

4. Alternative Options Available

4.1 Option 1 – the North East Joint Transport Committee may accept the recommendations set out in the report.

4.2 Option 2 – the North East Joint Transport Committee may suggest amendments or alternative proposals to be considered. Option 1 is the recommended option.

5. Next Steps and Timetable for Implementation

5.1 An update on the forecast of outturn against the 2022/23 budget will be presented to the JTC at its next meeting, and regular updates against budget presented to the committee during the 2023/24 financial year.

6. Potential Impact on Objectives

6.1 The budgets presented in this report are aligned to the achievement of the Transport policy objectives of the JTC. They allow a balanced budget to be established in 2023/24 and include a strategy to enable the delivery of services over the medium term.

7. Financial and Other Resources Implications

7.1 The financial and other resource implications are set out in the body of the report.

8. Legal Implications

8.1 There are no legal implications arising from this report.

9. Key Risks

9.1 Appropriate risk management arrangements are put in place in each budget area by the delivery agencies responsible. Reserves are maintained to help manage financial risk to the authority.

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 2023/24 budget was subject to consultation with JTC, JTC Overview and Scrutiny Committee and officer groups.

12.2 Individual schemes which may be supported through the funding will be subject to proportionate consultation as appropriate.

13. Other Impact of the Proposals

13.1 There are no other impacts arising from this report.

14. Appendices

14.1 None

15. Background Papers

15.1 JTC Budget 2023/24 – Report to JTC 17 January 2023
<https://northeastca.gov.uk/wp-content/uploads/2023/01/2023.01.17-JTC-Agenda-Pack.pdf>

16. Contact Officers

16.1 Eleanor Goodman, NECA Finance Manager,
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:

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North East Joint Transport Committee

Date: 21 March 2023

Subject: Forecast of Capital Outturn 2022/23 – Period to 31 December 2022

Report of: Chief Finance Officer

Executive Summary

This report provides the North East Joint Transport Committee (JTC) with an update on the forecast outturn position in relation to the 2022/23 Transport capital programme based on the position at the end of December 2022.

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

The report identifies that total capital expenditure on Transport schemes of £238.755m is now forecast against the revised capital programme budget of £251.408m, a forecast under-spend of £12.653m against the revised programme.

The forecast underspending in part relates to further reprofiling (£4.163m) in relation to Transforming Cities Fund (TCF) Tranche 2 schemes, based on the latest quarterly monitoring reports from scheme promoters. Delays have been due to scheme development difficulties, ongoing resource and capacity constraints and challenging market conditions. Change control requests are awaiting approval in relation to the second and third tranches of the Active Travel Fund (ATF), resulting in a total variance against the revised programme of £2.563m across both tranches with expenditure now forecast to take place in 2023/24.

An underspend of £1.440m against the revised programme is forecast on the Metro Asset Renewal Plan (MARP), due to market instability where the supply chain remains problematic. A variance of £3.740m is now forecast on the Metro Flow project, with the forecast outturn £86.629m against a revised budget of £86.774m. The majority of the variance relates to the purchase of Network Rail infrastructure but the final account on the project is not yet settled, with outstanding works still to complete and further analysis between Nexus and its principal contractor required.

Total capital programme expenditure to the end of December 2022 totalled £167.520m, 70% of the forecast total capital expenditure for the year.

Most of the capital works during the year will be funded through government grants awarded (£238.338m in 2022/23) with the Tyne Pedestrian and Cyclist Tunnels works funded by reserves (£0.417m in 2022/23) held specifically for this purpose.

Recommendations

The North East Joint Transport Committee is recommended to note the report.

1. Background Information

- 1.1 This report provides an update on the JTC capital programme for 2022/23 and the funding sources identified to deliver the programme, which covers a wide range of transport improvements.
- 1.2 In January 2022, the JTC approved the initial 2022/23 capital programme totalling £279.774m. The capital programme was then updated to take account of adjustments for the 2021/22 outturn, reprofiling and for new grant approvals made after the original capital programme was agreed. Following further revisions during the year, the approved capital programme for 2022/23 currently stands at £251.408m.
- 1.3 The updated position shows a revised capital programme forecast of £238.755m, with expenditure to the end of December £167.520m, or 70% of the forecast.

2. Proposals

- 2.1 A summary of the Transport capital programme for 2022/23 is set out in the table below, with further details provided in the following sections.

Table 1: Capital Programme summary 2022/23

	2022/23 Revised Budget	2022/23 Forecast Outturn	2022/23 Forecast Variance	Actual to 31 Dec 2022
	£m	£m	£m	£m
Transforming Cities Fund Tranche 2	53.470	49.307	(4.163)	21.698
Active Travel Fund – Tranche 2	3.269	2.635	(0.634)	2.635
Active Travel Fund – Tranche 3	1.929	0.000	(1.929)	0.000
Electric Vehicle Charging Infrastructure	0.398	0.153	(0.245)	0.026
Go Ultra Low Taxi Project	0.070	0.070	0.000	0.000
Metro Asset Renewal Plan	26.788	25.348	(1.440)	16.387
Metro Fleet Replacement	59.174	58.709	(0.465)	44.545
Nexus Other Capital Projects	4.135	4.091	(0.044)	1.389
Metro Flow	90.369	86.629	(3.740)	72.300

Tyne Tunnels	0.415	0.417	0.002	0.164
Local Transport Plan	11.391	11.396	0.005	8.376
Total	251.408	238.755	(12.653)	167.520

Transforming Cities Fund (TCF)

- 2.2 The North East was awarded £198m of capital grant for Tranche 2 of Transforming Cities Fund. Within the Tranche 2 schemes, £104m is for schemes where the decision making for funding is devolved to the region and the remaining £94m is for the Metro Flow scheme managed by Nexus, where the decision making on the funding is retained by the Department for Transport. Updates on Metro Flow are included with the Nexus Capital Programme sections in this report.
- 2.3 There are 23 schemes within the TCF Tranche 2 programme, of which 18 schemes have currently been approved, and 16 of these are now in or soon to be in delivery.
- 2.4 Total expenditure to date within the TCF Tranche 2 programme stands at £27.921m which represents 26.9% of the overall grant, an increase of £13.633m in quarter 3 of 2022/23. A further £27.609m is forecast for quarter 4 of this financial year. Expenditure forecasts have been based on quarterly monitoring returns and expenditure profiles included within scheme business cases.

Active Travel Fund

- 2.5 In November 2020, the North East region was allocated £9.049m of grant funding from Tranche 2 of the Active Travel Fund (ATF), of which £7.329m was capital. £0.262m of the capital funding was defrayed in 2020/21 and £1.187m in 2021/22.
- 2.6 6 Grant Funding Agreements (GFA) are in place with Durham, Gateshead, Newcastle (Queen Victoria Road), North Tyneside, Northumberland and South Tyneside. 3 of these schemes are completed or very near completion. Following a change control agreement with Active Travel England (ATE), a GFA is underway for Sunderland's ATF2 scheme, and the GFA process is also underway on the Grey Street Scheme. £2.635m is forecast for 2022/23 with the remaining expenditure due to be defrayed in 2023/24.
- 2.7 The region was awarded £17.929m capital funding from Tranche 3 of the Active Travel Fund. A number of schemes within the programme are still awaiting outcomes of change control requests, in addition to the Sunderland scheme referenced above. Once change control requests have been reviewed by ATE and final designs for all schemes have been signed off, it is anticipated that schemes will begin entering delivery in the coming months.

Electric Vehicle (EV) charging infrastructure

- 2.8 Intensive work is continuing in respect of the Local Growth Fund project to install new EV charging infrastructure at sites around the North East. We are liaising with local authorities to help progress schemes and the Local Enterprise Partnership are being kept updated.

2.9 Expenditure of £0.153m is forecast for 2022/23, with the remaining expenditure forecast to take place in 2023/24.

Go Ultra Low Taxi Project

2.10 It is expected that the final two chargers in Newcastle and North Tyneside will go live imminently with orders being placed for connections. Delays are owing to legal agreements and the capacity of the supply chain to act. The framework agreement with the supplier of the infrastructure is due to expire in February 2023 and the contract is being extended to facilitate the delivery of the programme including the evaluation of the success of the programme and future engagement. Expenditure of £0.070m is forecast for 2022/23, in line with the revised budget.

Nexus Capital Programme

2.11 The JTC approved Nexus' Capital Programme for 2022/23 to 2024/25 in January 2022. Following the 2021/22 outturn report a revised 2022/23 Capital Programme budget was approved by the JTC in July 2022. The programme is sub-divided into the following sections:

- Metro Asset Renewal Programme (MARP);
- Fleet Replacement Programme (FRP);
- Other Capital Projects (OCP): and
- Metro Flow (MFL).

2.12 The following report reviews financial performance, at the end of Period 10, against the latest revised programme budget approved in terms of:

- Actual cumulative spend at the end of the period;
- Latest forecast outturn for 2022/23; and
- Actual capital grant recovery.

2.13 Nexus' revised capital programme for 2022/23, provides for gross expenditure of £194.556m. By comparison, the 2022/23 forecast outturn as at Period 10 is £174.777m, a variance of £19.779m as detailed below. At the end of Period 10 the total programme spend was £134.621m, against budgeted spend of £146.361m. The £11.740m underspend relates to variances across all four programmes which is also detailed below.

2.14 *Table 2: Total Nexus Capital Programme*

	Original Budget	Revised Budget	Actual / Forecast	Variance
	£m	£m	£m	£m
Cumulative to Period 10				
Metro Asset Renewal Programme		20.551	16.387	(4.164)

Fleet Replacement Programme		54.758	44.545	(10.213)
Other Capital Projects		1.548	1.389	(0.159)
Metro Flow		69.504	72.300	2.796
		146.361	134.621	(11.740)
Outturn				
Metro Asset Renewal Programme	32.762	35.632	25.348	(10.284)
Fleet Replacement Programme	69.808	67.999	58.709	(9.290)
Other Capital Projects	8.345	4.151	4.091	(0.060)
Metro Flow	83.498	86.774	86.629	(0.145)
	194.413	194.556	174.777	(19.779)

2.15 At the end of Period 10, £136.313m of capital grant has been claimed from the Department for Transport (DfT). This includes both the MARP, FRP and MFL. The actual amount claimed in total was 99.2% of forecast and therefore within DfT tolerance levels of +/- 5%.

2.16 **Metro Asset Renewal Programme (MARP)**

Cumulative actual spend at the end of Period 10 was £16.387m against the revised budgeted profile of £20.551m. The resultant under spend is largely due to various projects including Network Refresh, Howdon Viaduct, Switches and Crossings at Pelaw and Monkseaton, Whitley Bay Canopy and Escalator and Lift Refurbishment.

2.17 The forecast outturn for 2022/23 is £25.348m against a revised budget of £35.632m. This includes £8.844m of projects which have been deferred into 2023/24, approved by the JTC on 17 January 2023. A further underspend of £1.440m is now expected, across a number of projects, including:

- £0.423m relating to Benton Square Safety and Security works due to delays in agreeing the scope of the project;
- £0.230m in connection with Lookout Protection works which are still to be scoped; and
- £0.183m in Overhead Line due to a reduction in the quantity of replacement materials procured this year.

2.18 The December grant claim was £3.357m, compared to the forecast £3.200m and therefore within the +/- 5% DfT target. Total grant claimed to date is £13.887m and MRG (capital) grant totalling £18.228m is forecast to be claimed by year end. This represents a shortfall in MRG (capital) grant 2022/23 of £11.972m. This will require

virement of funding from 2022/23 into 2023/24, of which 20%, or £6.040m is allowable under grant funding terms and conditions. Nexus is liaising with DfT Finance over the remainder and a positive response has been received.

- 2.19 This is the first time Nexus has had to seek approval outside of its grant funding conditions from DfT to vire monies between years and is a direct consequence of the continued instability in the market where the supply chain remains problematic, contractors are more risk averse when pricing jobs and/or accepting contractual terms and conditions and internal capacity has been adversely impacted by recruitment and retention of key staff. These factors are combining to increase risks to successful project delivery.
- 2.20 Moving forward Nexus options to de-risk delivery are being explored, albeit the point has been made to DfT that such mitigations require longer-term funding.
- 2.21 The forecast outturn of £25.348m will be funded from £18.228m MRG capital grant from DfT, with the remaining £7.120m funded from £4.751m of local funding (LTP), plus £2.369m Highways Challenge Fund (HCF) grant (for the Tanners Bank bridge replacement project).
- 2.22 Metro Capital Rail Grant (MRG) for 2023/24 to 2024/25 has been included as part of the North East devolution agreement announced on 28 December 2022. This funding will continue to be remitted to Nexus via DfT, rather than as part of any wider CRSTS funding package, with bids for future funding beyond March 2025 also being submitted via the Department through a future Spending Review. The majority of the local contribution, currently sourced from the Public Transport allocation of the LTP Integrated Transport Block is likely to form part of CRSTS and Nexus will need to seek its continuation.
- 2.23 **Fleet Replacement Programme (FRP)**
- Cumulative actual spend at the end of Period 10 was £44.545m against the approved budget profile of £54.758m. The £10.213m underspend relates to a £0.910m payment to Stadler under the manufacturing contract in the current year which is now programmed for July 2023, £4.209m as a result of delays to Type Testing (of the new trains), £2.213m deferred in respect of the Depot Construction Contract, and £2.881m of contingency that has not needed to be released yet.
- 2.24 Forecast outturn for 2022/23 is now £58.709m (including a risk contingency of £1.722m) against the revised budget of £67.999m. The £9.290m underspend largely relates to the variations set out in the paragraph above, although there is additional slippage in relation to the new depot, where P-Way, Signalling and Overhead Line works which were originally scheduled for March 2023 are now expected to be completed in July 2023.
- 2.25 The December grant claim is 87.5% of the forecast, due to Gosforth Depot works planned for December but delayed until January/February. This was outside of the +/- 5% DfT target who were advised accordingly.
- 2.26 The £58.709m forecast outturn is funded from the £58.694m DfT Fleet Replacement grant available in 2022/23, with the balance, £0.015m, funded from Arts Council

grant. This results in an under recovery of £6.106m against available Fleet Replacement Grant in 2022/23. DfT Finance have been advised that up to £7.800m of FRG grant may need to be deferred into 2023/24. As with the Metro Rail Grant discussions, a favourable response has been received.

2.27 **Other Capital Projects (OCP)**

In 2022/23 Other Capital Projects have a revised budget of £4.151m comprising of £2.382m Transforming Cities digital car parks project, £0.137m for the completion of the Bus Contracts system, £1.143m for Ground Investigation works at the site of the proposed North Ferry Landing relocation project, and a further £0.489m for Ferry vessels and maintenance of existing landings (North and South).

2.28 Cumulative actual spend at the end of Period 10 was £1.389m against the revised budgeted profile of £1.548m. The forecast outturn for 2022/23 is £4.091m (including a risk contingency of £0.399m) against an approved budget of £4.151m. The underspend primarily relates to slippage on the Transforming Cities, Digital Car Parks project.

2.29 In addition to the slippage, the overall cost estimate for the Digital Car Parks project is £0.654m higher than the revised budget highlighted above, with this spend also expected to fall in 2023/24. TNE are in dialogue with DfT to enable the Transforming Cities grant funding for this scheme to be carried over into 2023/24.

2.30 **Metro Flow (MFL)**

Cumulative actual spend at the end of Period 10 was £72.300m against a profiled budget of £69.504m. The £2.796m variance includes the purchase of the Network Rail Infrastructure, funded by an additional grant award from DfT, totalling £4.900m. offset by a £2.104m underspend relating to a changed profile of works by the contractor and risks avoided to date.

2.31 The forecast outturn for 2022/23 is £86.629m against a revised budget of £86.774m. The majority of the variance relates to the purchase of Network Rail infrastructure as described above. This is offset by a £5.045m underspend in the forecast. However, this estimate is fluid because there are still outstanding works to complete, which together with the commercial structure of the contract between Nexus and its principal contractor, means that there is further analysis to be undertaken before the final account can be settled. Dialogue has commenced with DfT to clarify the status of any TCF grant underspend and whether it can be retained to use for future capital expenditure.

Tyne Tunnels

2.32 The Tyne Pedestrian and Cyclist Tunnels reopened for public use in August 2019 after being closed for several years for refurbishment. They are currently open to the public with no charge to users. To access the tunnels, pedestrians and cyclists can use the vertical lift at both ends. The tunnels are monitored via CCTV by the 24-hour security presence on-site

- 2.33 The inclined glass lifts at the Tyne Cyclist and Pedestrian Tunnels are additional lifts which have been planned to increase capacity for cyclists and to provide a tourist attraction, as they are bespoke glass lifts which travel on a steep incline down the historic escalator shaft to the lowest part of the tunnels. Completion and certification of the inclined lifts is still awaited, as they have proved difficult to complete due to the bespoke nature of the design and issues with contractors.
- 2.34 The completion of the inclined lifts was delayed throughout 2020 with the Italian lift engineers (Maspero) citing Covid-19 travel restrictions as the principal reason for this. Maspero engineers were last on site in January 2020 and have not been back to site since.
- 2.35 New lift contractors were appointed in 2021 with works taking place in late 2021 and continuing into 2022. The new specialist lift engineers have made good progress on replacing the wiring and mechanical systems which control the lift. However, there are still works to be completed on the cabin, doors, and the door operating mechanisms. New parts are required and have been ordered, although they are subject to a longer delivery process than expected due to supply chain delays. As soon as the parts are installed and fitted the works can move on to the final stage of testing and certification. The new lifts will be able to carry up to 6 cyclists and their bikes in one journey.
- 2.36 It is likely that testing and commissioning of the inclined lifts will be completed early in the 2023/24 financial year. Capital budget provision of up to £0.200m to be funded from Tyne Tunnels reserves has been included in the programme for this.

Local Transport Plan

- 2.37 LTP Integrated Transport Block funding is made available by DfT to the whole JTC area. This block is allocated between the JTC constituent authorities on a locally agreed basis with an allocation to Nexus (mainly used to provide the match funding needed for the MARP capital programme). The LTP block allocation is also used to contribute to the costs of the TNE team and, in Tyne and Wear only, to the Urban Traffic Management and Control (UTMC) centre.
- 2.38 Expenditure to the end of December is £8.376m with £11.396m forecast for the year.

Capital Programme Financing

- 2.39 The forecast outturn for capital expenditure for 2022/23 will be financed as follows:

Table 3: Capital Programme Financing 2022/23

	2022/23 Revised Budget	2022/23 Forecast Outturn	2022/23 Forecast Variance	Actual to 31 Dec 2022
	£m	£m	£m	£m
Government Grants	248.698	238.338	(10.360)	167.356

Earmarked Reserves	2.710	0.417	(2.293)	0.164
Total Funding	251.408	238.755	(12.653)	167.520

3. Reasons for the Proposals

3.1 The information contained within this report is provided to the JC to enable it to fulfil its function of monitoring the Transport Capital Programme.

4. Alternative Options Available

4.1 Option 1 – The North East Joint Transport Committee may accept the recommendations set out in the report.

4.2 Option 2 – The North East Joint Transport Committee may suggest amendments or alternative proposals to be considered.

5. Next Steps and Timetable for Implementation

5.1 The Transport Capital Programme will be monitored for the remainder of the financial year and the outturn position reported following the year end.

6. Potential Impact on Objectives

6.1 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 potential.

7. Financial and Other Resources Implications

7.1 The financial implications are set out in detail within the body of the report. The report is for information and provides the JTC with a summary of the updated capital programme approved in January 2023.

8. Legal Implications

8.1 The authority has a duty to ensure it can deliver a balanced budget. The Local Government Act 2003 imposes a duty on an Authority to monitor its budgets during the year and consider what action to take if a potential deterioration is identified.

8.2 Scheme promoters are required to sign a Grant Funding Agreement (GFA) before funding is provided, within claims being made based on expenditure defrayed and an audited statement required before final retention is released.

8.3 There are no other legal implications arising from this report.

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 None

15. Background Papers

15.1 Capital Programme 2022/23 – JTC report 18 January 2022
<https://northeastca.gov.uk/wp-content/uploads/2022/01/2022.01.18-JTC-Agenda-Pack-v2.pdf>

15.2 Capital Programme Update – JTC report 15 November [\(Public Pack\)Agenda Document for North East Joint Transport Committee, 15/11/2022 14:30 \(northeastca.gov.uk\)](#)

16. Contact Officers

16.1 Eleanor Goodman, NECA Finance Manager,
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17. Sign off

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

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North East Joint Transport Committee

Date: 21 March 2023

Subject: Forecast of Revenue Outturn 2022/23 – Period to 31 December 2022

Report of: Chief Finance Officer

Executive Summary

This report provides the North East Joint Transport Committee (JTC) with an update on the forecast outturn position in relation to the 2022/23 Transport Revenue Budget.

The report covers all area of the revenue budget, including the Transport Levies and grants to Durham, Northumberland and Nexus, the budget for Transport North East and the Tyne Tunnels revenue account.

Where grants are paid to other organisations for the delivery of transport services (i.e. Durham, Northumberland and Nexus), the grant is fixed for the year but the report provides details of how the grant will be applied by each organisation to the provision of public transport services. Any under or over spends against the budget for these organisations are retained within their own reserves and will be considered in the setting of the transport budgets for future years.

An overspend of £0.664m is forecast by Durham Council, as a result of significant cost increases on subsidised bus services which have been mainly offset by reductions in the concessionary travel costs.

Northumberland County Council are forecasting an underspend of £0.395m relating to an underspend on the concessionary travel budget as a result of a negotiated reimbursement settlement with operators.

Nexus are now forecasting a surplus of £2.788m for 2022/23, which is £8.388m better than the original budget for the year, mainly as a result of Local Transport Fund and Energy Bill Relief Scheme (EBRS) unbudgeted grants received. The improved position in 2022/23 will enable the required greater reliance on reserves in future years to be met.

A small underspend of £0.090m is forecast against the Transport North East core budget as a result of underspends on research and strategy activity. This will be held in reserves to fund activity in the next financial year.

A small deficit of £0.115m is forecast on the Tyne Tunnels revenue account as a result of the decision to delay the application of the tolls increase on Class 2 and Class 3 vehicles to May 2023, keeping the toll at the current level throughout the winter to

provide relief for tunnels users during this period taking into account winter fuel bills and the current cost of living crisis. This will be funded by Tyne Tunnels reserves.

Recommendations

The North East Joint Transport Committee is recommended to note the report.

1. Background Information

- 1.1 The JTC meeting held on 18 January 2022 agreed a Transport net revenue budget for 2022/23 of £87.201m. This report presents an update against the latest budget with the forecast prepared based on the position at 31 December 2022.

2. Proposals

Forecast of Revenue Outturn 2022/23 – Period to 31 December 2022

- 2.1 The table below summarises the forecast outturn position against the net Transport Revenue budget for 2022/23. The levies and grants to Durham, Northumberland and Nexus are fixed for the year, but details of how the grant will be applied by each organisation to the provision of public transport services is set out in more detail in the following sections. Expenditure against the retained levy is forecast to be £2.120m, in line with the budget.

2.2 *Table 1: 2022/23 Transport Levies and Grants*

	2022/23 Original Budget	Spend to Date (31 December 2022)	2022/23 Forecast Outturn	2022/23 Forecast Variance
	£m	£m	£m	£m
Grant to Durham	15.609	11.707	15.609	0.000
Grant to Northumberland	6.347	4.760	6.347	0.000
Grant to Nexus	63.125	47.344	63.125	0.000
Retained Levy Budget	2.120	1.590	2.120	0.000
Total Expenditure	87.201	65.401	87.201	0.000
Transport Levies	(87.201)	(65.401)	(87.201)	0.000
Contribution to JTC unallocated reserves	0.000	0.000	0.000	0.000

Durham

- 2.3 The forecast of outturn at the end of December 2022 shows an overspend of £0.664m.
- 2.4 *Table 2: 2022/23 Forecast of Outturn – Durham County Council*

	2022/23 Original Budget	Spend to Date (31	2022/23 Forecast Outturn	2022/23 Forecast Variance
--	----------------------------------------	------------------------------	-----------------------------------------	------------------------------------------

		December 2022)		
	£m	£m	£m	£m
Concessionary Fares	12.205	5.059	11.071	(1.134)
Subsidised Services	2.688	2.322	4.294	1.606
Bus Stations	0.176	0.605	0.209	0.033
Bus Shelters	(0.268)	0.091	(0.109)	0.159
Passenger Transport Information	0.089	0.092	0.089	0.000
Staffing	0.719	0.539	0.719	0.000
Share of JTC Transport Costs	0.010	0.000	0.010	0.000
Net Expenditure	15.619	8.708	16.273	0.664

- 2.5 An anticipated underspend in Concessionary Fares is forecast based on a return to a reimbursement model following the lifting of Covid-19 restrictions, which, in line with current guidance, will be used to support the passenger transport network which is forecast to overspend in 2022/23 due to a combination of inflationary pressures and additional support for withdrawn services. Both Bus Stations and Bus Shelters are forecast to overspend due to additional premises costs being incurred this year and reduced bus shelter advertising income.

Northumberland

- 2.6 The forecast outturn position for Northumberland County Council shows an estimated underspend of £0.395m against the JTC revenue grant.

- 2.7 *Table 3: 2022/23 Forecast of Outturn – Northumberland County Council*

	2022/23 Original Budget	Spend to Date (31 December 2022)	2022/23 Forecast Outturn	2022/23 Forecast Variance
	£m	£m	£m	£m
Concessionary Fares	4.931	2.916	4.531	(0.400)
Subsidised Services	1.230	0.988	1.230	0.000
Bus Services	0.028	0.010	0.033	0.005

Passenger Transport Information	0.025	0.000	0.025	0.000
Staffing	0.133	0.100	0.133	0.000
Share of JTC Transport Costs	0.010	0.010	0.010	0.000
Net Expenditure	6.357	4.024	5.962	(0.395)

2.8 Concessionary Travel is forecast to underspend by £0.400m. Following the lifting of Covid-19 restrictions, the DfT has allowed local authorities to negotiate with the local travel providers regarding the reimbursement rates payable in respect of concessionary travel. Northumberland County Council has been able to negotiate two fixed price deals with the two major operators for the period April 2022 to March 2023 rather than based on a reimbursement rate per journey. This has provided budget certainty for all parties as passenger numbers are yet to recover to pre-pandemic levels.

2.9 The Supported Services budget is currently forecast to break-even. This was previously forecast to overspend by £0.266m with transport operators identifying routes that were no longer commercially viable and changes to some contract prices due to increased fuel prices, driver availability and other inflationary costs. However, following receipt of a DfT grant the overspend has been accommodated within the grant.

Nexus

2.10 Nexus has previously reported to the JTC that central government intervention, the form of the Local Transport Funding (LTF) and Energy Bill Relief Scheme (EBRS), has improved Nexus' expected financial position for 2022/23. In addition to this, increased investment income, and better performing fare revenue (Metro and secured bus services) are also having a positive impact on Nexus' forecast. This means that Nexus is no longer expecting to use reserves to balance this year's budget.

2.11 At the end of Period 10, the position has further improved, with the latest forecast showing a surplus of £2.788m, which is £8.388m better than the original estimate. This is an improvement of £2.3m on that previously reported to the JTC, which mainly comprises increased Metro fare revenue (£1.0m), additional LTF income relating to January-March (£0.7m) and additional investment income (£0.6m). Whilst this is a significant achievement considering the budgetary pressures and financial challenges that Nexus is contending with, it should be noted that this turnaround would not have been possible had it not been for LTF and EBRS funding received, which combined are expected to provide Nexus with an estimated £16.512m of unbudgeted grant support this year.

2.12 As previously reported to the JTC, in the budget setting for 2023/24 the position for the next financial year and subsequent years has worsened significantly relative to the medium term financial plan (MTFP) presented to the JTC this time last year. At the JTC meeting on 17 January 2023, Nexus' budget for 2023/24 was approved. This

includes the use of £8.0m reserves, which is possible due to the improved performance described in paragraph 2.11. Whilst a financial gap still exists in 2023/24 due to the cost of high voltage (HV) power, the gap has reduced since the JTC approved the budget, which together with the better position now being forecast in 2022/23, makes the position next year more manageable. Nexus is still liaising with officials in DfT Rail for additional financial support.

- 2.13 The table below shows expenditure to the end of period 10, together with the forecast to the year end (based on current estimates of the likely outturn) against the revised budget. There is narrative following the table explaining the variances against the revised budget across the main service areas.

Table 4: 2022/23 Forecast of Outturn - Nexus

- 2.14

	2022/23 Revised Budget	Spend to Date (period 10)	2022/23 Forecast Outturn	2022/23 Forecast Variance
	£m	£m	£m	£m
Concessionary Fares	31.155	23.483	30.498	(0.657)
Metro	17.076	9.345	12.446	(4.630)
Bus Services	15.327	8.525	12.295	(3.032)
Other	5.167	3.507	5.098	(0.0.69)
	68.725	44.860	60.337	(8.388)
JTC Grant	(63.125)	(48.771)	(63.125)	0.000
(Surplus)/Deficit to Nexus Reserves	5.600	(3.911)	(2.788)	(8.388)

- 2.15 **Metro**

At the end of period 10, financial performance on Metro shows net expenditure at £4.630m better than the revised budget, after central government support. During the year, the inflationary pressures have continued to rise, most notably the cost of HV power, which has more than doubled (estimated at £21.95m against a base budget of £8.356m), caused by geo-political factors and continued instability in the energy market. However, after taking into account the EBRS introduced by the Government (which will discount the HV power bill by an estimated £6.186m) and the allocation of LTF grant (which in total is now expected to be £10.326m), the in-year HV power cost is now funded.

- 2.16 Metro fare revenue at the end of period 10 was £32.499m which exceeded the profiled budget by £2.913m (10%) which was set based on 84% of pre-Covid levels. Metro fare revenue continues to perform well and is expected to be better than budget by the end of the year. At this stage, a favourable variance of £2.300m is

included in the forecast which is an increase of £1.000m since the previous report. The forecast also reflects the introduction of a £2 fare on Metro for Pay as You Go (PAYGO) products for the period January to March 2023, where revenue forgone is estimated to be around £0.300m.

- 2.17 The forecast at the end of period 10, reflects a net saving of £0.890m across a number of Metro budget heads, including travel ticket costs, cash handling, and additional contract income. The forecast also includes savings expected in employee costs due to a number of posts being held vacant for longer than originally planned, which is expected to amount to £0.700m.
- 2.18 The Metro forecast also benefits from savings in overheads (which are also applicable to other service areas), including ICT licenses, support services costs and unused contingencies. In addition to this, due to the rise in interest rates, the forecast investment income has continued to increase and is now expected to be £1.375m higher across the year. The forecast overhead savings and interest income allocated to Metro is £1.040m for the year.
- 2.19 It is important that this apparent underspend is seen in the context of the significant amount of additional central government support (LTF and EBRS) that has been received. As explained in paragraph 2.12, as greater reliance on reserves is required in future years, it is necessary that the improvement in 2022/23 is earmarked for this.

Concessionary Fares

- 2.20 At the end of period 10, concessionary fares include higher than budgeted school income of £0.211m and other savings (teen travel and consultancy) of £0.122m. The forecast outturn for school income is expected to be £0.232m higher across the year. The forecast also reflects savings of £0.168m in respect of teen travel and consultancy, as well as increased overhead savings and interest income, as outlined in paragraph 2.18, of £0.257m.

Bus Services

- 2.21 Taking into account the LTF grant, financial performance on Bus Services shows net expenditure is expected to be £3.032m better than the revised budget. Across the year, fare revenue is expected to be £0.987m better than budget. In addition to this, there are expected to be savings of £0.942m on secured service contracts, through the use of LTF grant and where an above inflation increase in the budget has not been fully required, following the network reconfiguration in response to commercial cuts and tender prices that have been subsequently obtained. The forecast also reflects £0.060m of savings on Taxi Card costs.
- 2.22 During the year, Nexus has received £0.535m of additional Bus Recovery Grant funding from DfT via TNE, which is reflected within the forecast outturn. This represents unused funding from the previous financial year, which had been carried forward under the terms and conditions of the grant. Finally, there are increased overhead savings and interest income, as outlined in paragraph 2.18, which are expected to amount to £0.508m for the year.

2.23 It is important that this apparent underspend be seen in the context of both the significant amount of additional central government support (LTF and BRG) that has been received. As explained in paragraph 2.12, as greater reliance on reserves is required in future years, it is necessary that the improvement in 2022/23 is earmarked for this.

Other

2.24 Other includes Ferry, Bus Infrastructure and Passenger Transport Information and at the end of period 10, financial performance shows net expenditure is expected to be £0.069m better than the revised budget, before application of reserves. To the end of period 10, ferry revenue is £0.320m, which is £0.040m higher than the profiled budget. The forecast has been updated to reflect an estimated favourable variance of £0.044m for the year. However, this is offset by higher than budgeted costs across ferry fuel, maintenance and insurance, as well as bus infrastructure cleaning and maintenance, which total £0.153m. In addition, there are overhead savings and interest income of £0.178m (paragraph 2.18 refers).

Transport North East

2.25 The TNE core budget is funded through contributions from the Transport Levies which are retained to support JTC activity and a topslice of the Local Transport Plan (LTP) Integrated Transport Block grant which is awarded to the JTC plus external contributions to fund specific posts and external grants for specific programmes and projects.

2.26 Forecast expenditure for 2022/23 is £0.860m, slightly less than the budget of £0.950m due to reduced costs relating to strategy and Transport Plan work and research and development and the budget contingency not being required this year. Employee costs are forecast to be £0.023m higher than the budget due to a restructure of posts which took place during the year, with the increased costs accommodated within the overall budget.

2.27 Total income forecast for 2022/23 is £0.990m which is £0.040m higher than budget due to receipt of additional external contributions and grants. This results in a small forecast surplus of £0.130m which will be added to reserves to fund activity in the next financial year.

Table 5: Transport North East Core Budget

	2022/23 Original Budget	Spend to Date (31 December 2022)	2022/23 Forecast Outturn	2022/23 Forecast Variance
	£m	£m	£m	£m
Employee costs	0.709	0.491	0.732	0.023
Transport Plan/Strategy Work	0.060	0.014	0.036	(0.024)

Research and Development	0.100	0.042	0.045	(0.055)
Travel and Miscellaneous	0.021	0.016	0.023	0.002
IT/Equipment/Accommodation	0.011	0.004	0.011	0.000
Contingency	0.049	0.002	0.003	(0.046)
Organisational Development	0.000	0.004	0.010	0.010
Total Expenditure	0.950	0.573	0.860	(0.090)
Local Transport Plan grant	(0.500)	(0.500)	(0.500)	0.000
Retained Transport Levy	(0.284)	(0.284)	(0.284)	0.000
External Funding for specific posts	(0.166)	(0.086)	(0.196)	(0.030)
LTA Capacity Revenue Grant	0.000	(0.004)	(0.010)	(0.010)
Total Income	(0.950)	(0.874)	(0.990)	(0.130)
Net Expenditure to be funded from Reserves	0.000	(0.301)	(0.130)	(0.130)
Contribution to/(from) reserves	0.000	0.301	0.130	0.130

2.28 A number of new revenue funding streams were awarded to TNE to administer subsequent to the original budget being set and these are included in the forecast outturn. These include the Capability Fund, City Region Sustainable Transport Settlement revenue grant and funding from the Local Transport Fund in respect of socially necessary bus services and light rail services, for the periods April to October and October to December 2022.

2.29 It is anticipated that the Enhanced Partnership scheme will come into effect in 2023/24 and the associated government funding will be received in the new financial year. Work on the development of the scheme to date has been funded through grant provided by the DfT for this work which was received in 2021/22.

Table 6: TNE Grants and Contributions Budget

	2022/23 Original Budget	Spend to Date (31 December 2022)	2022/23 Forecast Outturn	2022/23 Forecast Variance
Active Travel Planning	0.796	0.446	0.747	(0.049)
BSIP/ Enhanced Bus Partnership	0.280	0.299	0.644	0.364
Bus Recovery Grant	0.000	1.676	1.676	1.676

Capability Fund	0.000	0.064	2.394	2.394
City Region Sustainable Transport Settlement	0.000	0.000	0.293	0.293
Freight Study	0.000	0.000	0.050	0.050
Local Transport Fund (Bus and Light Rail) Apr-Oct	0.000	9.924	9.924	9.924
Local Transport Fund (Bus) Oct-Dec	0.000	0.000	1.312	1.312
Metro Futures Planning Studies	1.136	0.216	0.600	(0.536)
Rail Development	0.236	0.148	0.238	0.002
TCF Programme Management	0.621	0.240	0.340	(0.281)
Total Expenditure	3.069	13.013	18.218	15.149
ATF Revenue grant	(0.796)	(0.446)	(0.747)	0.049
Capability Fund grant	0.000	(0.064)	(2.394)	(2.394)
City Region Sustainable Transport Settlement	0.000	0.000	(0.293)	(0.293)
DfT BSIP grant	(0.207)	(0.299)	(0.644)	(0.437)
DfT Bus Recovery Grant	0.000	(1.676)	(1.676)	(1.676)
Local Transport Fund	0.000	(9.924)	(11.236)	(11.236)
Metro Futures Planning Studies - funded by Nexus budget transfer	(1.136)	(0.151)	(0.530)	0.606
Metro Futures Planning Studies – LEP funded	0.000	(0.065)	(0.070)	(0.070)
Rail Administration Grant (via Nexus)	(0.236)	(0.148)	(0.238)	(0.002)
TCF Tranche 2	(0.621)	(0.207)	(0.308)	0.313
Total Grants and Contributions	(2.996)	(12.980)	(18.136)	(15.140)
Net Expenditure (to)/from Reserves	0.073	0.033	0.082	0.009

Tyne Tunnels

- 2.30 The Tyne Tunnels are accounted for as a ring-fenced account within the JTC budget, meaning that all costs relating to the tunnels are wholly funded from toll income and Tyne Tunnels reserves, with no call on the levy or external government funding.
- 2.31 The JTC receives all toll income from the vehicle tunnels in the first instance and a payment under the contract with TT2 is determined based on traffic levels. The balance retained by the JTC is to meet other costs associated with the Tyne Tunnels, primarily interest and principal repayments on borrowing taken out to fund the New Tyne Crossing project, and other client costs associated with the management of the contract with the concessionaire.
- 2.32 The updated forecast outturn for 2022/23 is set out below.

Table 7: Tyne Tunnels Forecast of Outturn 2022/23

	2022/23 Original Budget	Spend to Date (31 December 2022)	2022/23 Forecast Outturn	2022/23 Forecast Variance
Tolls Income	(32.715)	(27.111)	(30.977)	1.738
TT2 Contract	24.322	17.728	24.104	(0.218)
Employees	0.142	0.100	0.129	(0.013)
Historic Pensions	0.050	0.031	0.050	0.000
Premises	0.014	0.080	0.089	0.075
Support Services	0.155	0.021	0.160	0.005
Supplies and Services	0.195	0.228	0.610	0.415
Financing Charges	8.140	0.000	6.466	(1.674)
Interest/Other Income	(0.065)	(0.010)	(0.278)	(0.213)
Repayment from TWITA for temporary use of reserves	(0.240)	(0.240)	(0.240)	0.000
(Surplus)/Deficit for the year	(0.002)	(9.172)	0.113	0.115

- 2.33 The forecast for tolls income in the current financial year is £1.738m lower than the original budget for the year as this had assumed that an increase in the toll would be applied during the financial year. The 2022/23 forecast and 2023/24 budget includes the impact of the decision taken by the Tyne and Wear Sub Committee in November 2022 in relation to the tolls increase. The Committee agreed an increase in the tolls to be applied from May 2023 for Class 2 and Class 3 vehicles, a delay from the earliest applicable date of February 2023, keeping the toll at the current level for both Class 2 and Class 3 vehicles throughout the winter to provide relief for tunnels users during this period taking into account winter fuel bills and the current cost of living

crisis. The income lost by holding the Class 2 tolls at the current levels for this period will be funded by Tyne Tunnels reserves.

- 2.34 This delay does not affect the increase in the 'shadow toll' payable to TT2, which increased to £2.30 from 1 January 2023.
- 2.35 Premises costs included in the budget relate to utilities charges for the Tyne Pedestrian and Cycle Tunnels. The two tunnels are around 270 metres in length and open 24 hours a day, 7 days a week. Electricity costs relating to lighting systems, CCTV and security systems and the lifts at either end are substantial and have increased significantly during 2022/23 as energy prices have increased sharply. The forecast is £0.078m higher than the budget for the year due to price increases.
- 2.36 The forecast for supplies and services is £0.330m higher than the original budget for the year due to the requirement for external engineering and legal support and costs of service contracts relating to the pedestrian and cycle tunnels.
- 2.37 Cost increases are largely accommodated during the financial year because financing charges are forecast to be £1.674m lower than the original budget. The budget had included some additional accelerated principal repayments on debt relating to the New Tyne Crossing. In order to offset the reduction in tolls income the additional, accelerated repayments of debt will not now be made in 2022/23. The minimum level of revenue provision for the repayment of debt will be made, along with all interest payments. In addition, interest and other income is forecast to be £0.143m in excess of the budget, as increases in interest rates during the year mean higher returns are now available on short term investments.
- 2.38 The small deficit forecast for 2022/23 relates to the decision to delay the application of the tolls increase and will be funded from Tyne Tunnels reserves.

Devolution: Transport transition

- 2.39 TNE are preparing for the creation of NEMCA in May 2024 while continuing to deliver transport improvements over the coming financial year. The Transport Plan is the agreed regional starting point. The Transport Plan is being refreshed to quantify carbon reductions, and to update the 'pipeline' of priority schemes. The devolution deal which is being consulted upon provides £563m of capital funding to the end of 2026/27, with extra capital funds through BSIP, Levelling Up, Active Travel and Local Electric Vehicle Infrastructure (LEVI).
- 2.40 A number of transition tasks are needed, as well as continuing to deliver the Transport Plan using BSIP, Levelling Up and LEVI funding, which involve a significant increase in activity. Detailed work is underway to
- 2.41 Additional staffing resources are required in order to deliver this work alongside existing commitments and a proposed 7 roles will be recruited to carry out the devolution transition tasks needed so that the new Cabinet and Mayor are well placed

to decide on new policies in 2024, and to start delivering improvements on the ground at an early stage.

- 2.42 Detailed budget proposals are being worked up for the funding of the work. It is planned that this will be funded through a combination of external funds secured (such as CRSTS revenue funding), other external grants where appropriate, and interest on revenue balances. No additional local authority contributions are proposed.

3. Reasons for the Proposals

- 3.1 This report is to update the JTC budgets for 2022/23 and 2023/24.

4. Alternative Options Available

- 4.1 Option 1 – the North East Joint Transport Committee may accept the recommendations set out in the report.
- 4.2 Option 2 – the North East Joint Transport Committee may suggest amendments or alternative proposals to be considered. Option 1 is the recommended option.

5. Next Steps and Timetable for Implementation

- 5.1 Performance against the revenue budget for 2022/23 will be monitored for the remainder of the financial year and a report on the final outturn presented to the JTC at its meeting in July 2023.

6. Potential Impact on Objectives

- 6.1 The budgets presented in this report are aligned to the achievement of the Transport policy objectives of the JTC. They allow a balanced budget to be established in 2023/24 and include a strategy to enable the delivery of services over the medium term.

7. Financial and Other Resources Implications

- 7.1 The financial and other resource implications are set out in the body of the report.

8. Legal Implications

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

9. Key Risks

- 9.1 Appropriate risk management arrangements are put in place in each budget area by the delivery agencies responsible. Reserves are maintained to help manage financial risk to the authority.

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 2022/23 budget was subject to consultation with JTC, JTC Overview and Scrutiny Committee and officer groups.

12.2 Individual schemes which may be supported through the funding will be subject to proportionate consultation as appropriate.

13. Other Impact of the Proposals

13.1 There are no other impacts arising from this report.

14. Appendices

14.1 None

15. Background Papers

15.1 JTC Budget 2022/23 – Report to JTC 18 January 2022
<https://northeastca.gov.uk/wp-content/uploads/2022/01/2022.01.18-JTC-Agenda-Pack-v2.pdf>

JTC Budget 2023/24 – Report to JTC 17 January 2023
<https://northeastca.gov.uk/wp-content/uploads/2023/01/2023.01.17-JTC-Agenda-Pack.pdf>

16. Contact Officers

16.1 Eleanor Goodman, NECA Finance Manager,
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:

North East Joint Transport Committee

Date: 21 March 2023

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.'

The North East has received confirmation of £118 million of BSIP funding for this year, which will initially be used to progress with schemes in the later stage of development including bus priority and new fares products.

Following revisions in the light of feedback from Transport North East and other partner authorities, the revised draft of TfN's second Strategic Transport Plan will be taken to TfN Board for approval on 25th March. The Plan sets out transformative proposals to improve transport across the north including support for restoration of the Leamside line.

Transport for the North's annual conference took place on 6th March at the Crowne Plaza Hotel in Newcastle. Concerns around rail performance in the North were discussed, as well as the need for major improvements to infrastructure. On a more local scale, the significance of reopening the Leamside Line was widely identified as a key regional priority for the North East.

The Secretary of State for Transport Mark Harper visited the Northumberland Line on 6th March to confirm that the line is expected to be reopened between Ashington and Newcastle in summer 2024.

Rail performance in the region is currently performing below target levels of arrival within scheduled timetabling and train cancellations. The Durham Coast and Saltburn to Carlisle services are the worst performing in each of these metrics respectively.

Progress continues on delivery of the Local Growth Fund EV charger programme with completion of work at the various sites anticipated by late summer.

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 Bus travel

BSIP funding – At the Annual Transport for the North Conference on 6th March, the Secretary of State for Transport confirmed that the region would receive £118 million in BSIP funding from the Government this year. Following this confirmation, and once the JTC make the Enhanced Partnership, the Partnership will begin to deliver initiatives aimed at our BSIP Key Performance Indicators (KPIs) of boosting bus ridership, performance, customer satisfaction and environmental standards. Transport North East have identified initiatives which can be fast tracked for delivery as they are at a later stage of development. The first initiatives to be brought forward include:

- BSIP fares schemes which will deliver cheaper multimodal, multi operator day tickets and discounted single and day tickets for under 22s
- A suite of bus priority infrastructure interventions that will begin to speed up journey times and make them more reliable throughout the region
- Service enhancements to connect more people in the region to the bus network
- Season passes for Care Experienced young people, following a successful trial in Newcastle and Gateshead which aimed to tackle transport poverty among young people who are new to living independently

Other initiatives, such as a new integrated app and website, additional staffing and a major Park and Ride site will be simultaneously developed.

Bus Recovery Grant and £2 fare cap – The Government has confirmed that the Bus Recovery Grant, which is funding that Central Government has been paying directly to bus operators to support them throughout the COVID-19 pandemic with patronage falling significantly, will be extended by a further 3 months till the end of June. The £2 fare cap for single journeys, which was introduced at the beginning of 2023, has also been extended till the end of June to encourage people back to the bus.

Qualifying Agreement – Record of delegated decision by Officer

An urgent officer decision has been taken on the Qualifying Agreement (QA) report that was taken to the JTC meeting on the 21 February 2023. As this meeting was not able to form a quorum and the decision on the QA report was time sensitive, as bus operators needed to submit registrations to the Traffic Commissioner to meet the 26 March 2023 service change date, the Monitoring Officer suggested taking it as an urgent delegated decision. Members present were briefed on the aims of the

QA and raised no objection to the approach of using an urgent delegated decision. JTC members are noted that this decision was made and published on the NECA website on 24 February 2023.

2.2 Metro

New Metro Fleet – The first of the new Metro trains arrived in the North East on the 28th February, after Stadler successfully delivered it from their factory in Switzerland. The Stadler Class 555 Metro train, the first of 46 that Nexus has on order as part of the £362m programme, will undergo a period of testing and driver training before entering customer service in the autumn.

3. **Connectivity beyond our boundaries**

3.1 Transport for the North (TfN)

Strategic Transport Plan – The latest draft of TfN’s second Strategic Transport Plan (STP2) will be taken to TfN Board for approval on 25th March. This will be followed by public consultation on the Plan after the May elections, prior to final publication in January 2024. The Plan, which has been recently reviewed by Transport North East and other partners, outlines a strategy for transformative improvements to transport connectivity across the north and expresses support for restoration of the Leamside line.

TfN Conference – TfN’s fourth annual conference was held in Newcastle on 6th March at the Crowne Plaza Hotel. Speakers from across the North attended to discuss the major economic challenges and opportunities facing the North of England in 2023, and the role that TfN and its partners can play to help address these challenges through improved transport connectivity. North of Tyne Mayor Jamie Driscoll, JTC Chair Cllr Martin Gannon, Secretary of State for Transport Mark Harper and the Shadow Transport Secretary Louise Haigh all participated in the event. Some of the key areas of discussion from the day were:

- Concerns over rail performance were a key topic for discussion, especially given the conference took place a day after rail fares were increased by five per cent and there were also several TransPennine Express cancellations that day. Discussions focused on the poor performance of rail operators in the North and the need for vastly improved rail infrastructure.
- The potential benefits that could be unlocked for transport in the North East via the proposed devolution deal, with a particular focus on the campaign to restore the Leamside Line. The Shadow Transport Secretary confirmed her party would deliver this if they were elected, as well as stating that Labour would deliver HS2 and Northern Powerhouse Rail (NPR) in full if it was in Government. A key commitment included as part of NPR is the reopening of the Leamside Line.

3.2 Rail

Delays and cancellations – There has been a slight improvement in the latest period performance figures however levels are still below targets for the region especially on the Durham Coast line. The most recent round of industrial action and increased levels of sickness amongst train company staff is still a cause of cancellations and delays. Local services are still seeing around an average of 7% of services cancelled and around 85% of services running to target arrival times.

Engineering works on the Bishop Line between Darlington and Bishop Auckland and track works in the Durham area are now complete, with weekend operations now resuming rather than diversions or rail replacement bus services.

Northumberland Line – The Secretary of State for Transport Mark Harper visited the Northumberland Line on the 6th March to confirm that the line and its six new stations is expected to be reopened to passengers between Ashington and Newcastle in summer 2024. The line had originally been expected to be completed by the end of 2023.

Industrial action – The RMT union has decided to call off industrial action it had planned at Network Rail for 16th March 2023 after receiving a new offer from Network Rail. Strikes will still go ahead for 14 smaller train operating companies but it is expected the effect on services will be significantly less than from a combined strike with Network Rail.

4. Making the right travel choice

5.1 Local Growth Fund EV charger project – Progress continues in liaison with the contractors and local authorities to finalise work at various sites and it is anticipated that the programme should be completed by late summer.

5.2 Local Electric Vehicle Infrastructure (LEVI) Capability Fund – The JTC is due to receive £249,660 from the capacity and capability fund which is to be spent on increasing capacity and capability for the planning and delivery of EV Infrastructure. The JTC are required to submit a proposal for allocating the funding to the Office for Zero Emission Vehicles (OSEV) by 10th March, and the funding is proposed to be spent on:

- Refreshing the EV enabling study to identify locations for charging infrastructure up to 2035, ensuring we are well placed to meet predicted demand.
- Hiring a Senior ZEV Infrastructure Development Officer at Transport North East.
- The remaining money is proposed to be split evenly between the seven Local Authorities to help with resource for ZEV activity.

5.3 Active Travel Strategy – Consultation on the Active Travel Strategy closed on the 5th March 2023, the feedback received from the consultation will now be reflected in the

strategy and a consultation feedback report will be published. In total over 2000 survey responses were collected and 9 in person and 4 online events were held.

6 Transport Usage Trends

6.1 Across the region public transport usage remains below pre-pandemic levels, with bus passenger numbers at 77% and Metro passengers at 84% of their pre-pandemic baselines in January. Traffic levels were around 5% up on the same period in the previous year. Daily cycling rates across the Millennium Bridge in January were up by around 47% on December levels.

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

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 Progress on Key Performance Indicators.

19. Background Papers

19.1 None.

20. Contact Officers

20.1 Toby Hughes, Managing Director, Transport North East

Toby.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>	No Change	<p>Data is not yet available to update, however, there have been no major changes to infrastructure.</p>

<p>Data source: Commissioned analysis August 2020</p>		
<p><u>Climate action</u></p> <p>CO2 emissions per capita: 1.7 tonnes CO2 emitted per persona annually using transport.</p> <p>Data source: UK local authority and regional CO2 emissions statistics: 2019, Department for Business, Energy & Industrial Strategy, published June 2021</p>	<p>Decrease</p>	<p>Figures for 2020 have been released and show 1.4 tonnes CO2 emitted per persona annually using transport. It can be expected that 2020 is an unusually low year due to COVID-19 related travel restrictions.</p>
<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>	<p>Increase</p>	<p>1.2% of licenced vehicles in the region are classed as ultra-low emission (Q3 2022).</p> <p>The number of ULEVs registered in the North East increased to 12,134 at the end of Q3 2022.</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>Decrease</p>	<p>For 2022, the highest, median hourly nitrogen dioxide reading was 22.2ug/m3 occurring in the morning traffic peak.</p>

<p>Data source: Department for Environment Food & Rural Affairs Automatic Urban and Rural Network (AURN)</p>		
<p><u>Network performance</u></p> <p>In terms of efficiency, in 2019 our regional network scored 71.8%</p> <p>Data source: Department for Transport congestion data.</p>	<p>No Change</p>	<p>Data is not yet available to update</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 was 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</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</p>

<p>average (2016-17 to 2018-19) 778</p> <p>Data source: Traffic Accident Data Unit</p>		<p>volumes in 2020 and 2021 are likely to have contributed to the observed reduction in KSIs.</p> <p>The rolling average covering Jan-Sept 2020-22 is 453, a decrease from 498 covering Jan-Sept 2019-21.</p>
<p><u>Road safety: number of slight injuries</u></p> <p>Number of slight injuries three year rolling average (2016-17 to 2018-19) 3,275</p> <p>Data source: Traffic Accident Data Unit</p>	<p>Decrease</p>	<p>The three-year rolling average from 2018 to 2021 was 2,519 slight injuries.</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>The rolling average covering Jan-Sept 2020-22 is 1,638, a decrease from 1,839 covering Jan-Sept 2019-21.</p>