



North East Joint Transport Committee

Tuesday, 12th July, 2022 at 2.30pm

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

AGENDA

	Page No
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 14 June 2022	3 - 6
4. 2021/22 Revenue Budget and Capital Programme Outturn	7 - 28
5. 2022/23 Revenue Budget and Capital Programme Update and 2023/24 Budget Setting Process	29 - 50
6. Transforming Cities Fund Tranche 2 - Grant Funding Agreements	51 - 56
7. Transport Plan Progress Report	57 - 66
8. North East 'Making the Right Travel Choice' Strategy - Agreement to Consult	67 - 146
9. Delegations to the Proper Officer for Transport	147 - 150

10. **Date of Next Meeting**

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

Contact Officer: Emma Reynard
Tel: 0191 433 2280
E-mail: emmareynard@gateshead.gov.uk



NORTH EAST JOINT TRANSPORT COMMITTEE

DRAFT MINUTES FOR APPROVAL

DATE: 14 JUNE 2022

Meeting held: Council Chamber, Gateshead Civic Centre

COMMITTEE MEMBERS PRESENT:

Councillor: M Gannon (Chair)

Councillors: E Gibson, C Johnson, N Kemp, G Miller, G Sanderson and E Scott

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, , D Gittins, A Flynn, P Fleming, R Forsyth-Ward, A Graham, E Goodman, G Grant, H Lewis, L Keating, C Knight, H Jones, P Meikle, R O'Farrell, E Reynard and M Wilson.

In attendance: Councillor J Foreman and Councillor T Campion

1. APPOINTMENT OF THE CHAIR AND VICE CHAIR FOR THE MUNICIPAL YEAR 2022/23

RESOLVED: The North East Joint Transport Committee agreed to appoint:

- (i) Councillor Martin Gannon as Chair for the municipal year 2022/23; and
- (ii) Councillor Carl Johnson as Vice Chair for the municipal year 2022/23

2. APOLOGIES FOR ABSENCE

Apologies were received from Councillor Tracey Dixon and Councillor Ernest Gibson.

3. DECLARATION OF INTERESTS

There were no declarations of interest.

4. MINUTES OF THE PREVIOUS MEETING HELD ON 15 MARCH 2022

The minutes were agreed as a correct record.

5. DECISION NOTICE FROM THE TYNE AND WEAR SUB-COMMITTEE HELD ON 7 APRIL 2022

The Committee noted the information.

6. APPOINTMENT OF JTC COMMITTEES

The Committee considered a report which sought:

- (i) The approval of the membership of the JTC Committees for 2022/2023;
- (ii) The reappointment of the Independent Chairs and Vice Chairs for the JTC Audit Committee and the JTC Overview and Scrutiny Committee and the appointment of the Chair and Vice Chair for the JTC Tyne and Wear Sub-Committee;
- (iii) The reappointment of representatives to the Transport for the North Rail North Committee and Transport for the North General Purposes Committee.

RESOLVED: The North East Joint Transport Committee:

- (i) Agreed the appointment of committee members and sub-committee members for the municipal year 2022/2023 as set out in Appendix A of the report and noted the information on committee membership provided by Councillor Elizabeth Scott at the meeting in relation to Durham County Council;
- (ii) Agreed the reappointment of Mark Scrimshaw as Chair and Stuart Green as Vice-Chair of the JTC Audit Committee for one year;
- (iii) Agreed the reappointment of David Taylor-Gooby as Chair and Andrew Clark as Vice-Chair of the JTC Overview and Scrutiny Committee for one year;

- (iv) Agreed to appoint Councillor Carl Johnson as Chair and Councillor John McElroy Vice Chair of the JTC Tyne and Wear Sub-Committee for the municipal year 2022/2023.
- (v) Agreed the reappointment of Mayor Jamie Driscoll as representative and Councillor Martin Gannon as substitute to the Transport for the North Rail North Committee;
- (vi) Agreed the reappointment of Councillor Martin Gannon as representative and Mayor Jamie Driscoll as substitute to Transport for the North General Purposes Committee;
- (vii) Agreed to delegate any changes to membership necessary to accommodate political balance, or appointments to any outstanding vacancies, on any of the Joint Transport Committees to the Lead Chief Executive (Transport) following consultation with the Chair of the Joint Transport Committee to comply with the relevant legislation and ensure any vacancies can be filled as soon as possible.

7. PROGRAMME OF MEETINGS FOR 2022/23

The Committee received a report which sought agreement of a programme of meetings for the municipal year 2022/23. The programme of meetings is intended to assist the Joint Transport Committee in discharging its functions effectively and has been developed in consultation with constituent combined authorities.

RESOLVED: The North East Joint Transport Committee agreed the proposed programme of committee meetings as set out in Appendix A of the report.

8. NORTH EAST RAIL AND METRO STRATEGY

The Chair invited Mr D Shaw, representing SENRUG and Railfuture North East to speak to the Committee regarding the North East Rail and Metro Strategy. Mr Shaw advised the Committee that the organisations he was representing were supportive of the proposals within the Strategy, however it was felt that improvements needed to be made to timetables to cover all aspects of services. In addition, it was suggested that an additional chapter covering the vision for the region should be added.

The Chair thanked Mr Shaw for his contribution to the meeting. Officers advised that the points raised were indeed included within the details of the strategy but with it being a comprehensive but lengthy document it can sometimes be difficult to navigate and thus agreed to produce a short summary document to highlight the key aspects more clearly.

The Committee then considered the report which outlined the responses to the public consultation on the draft North East Rail and Metro Strategy. Over 1000 responses had been received during the consultation period. The majority of the

responses had been very positive and broadly supportive of content of the draft document.

Councillor Gannon commented that there were two aspects to the Strategy. In the first instance the response to covid needed to be addressed but alongside this work continues to realise the region's economic potential, tackle congestion and air quality and improve public transport.

RESOLVED: The North East Joint Transport Committee:

- (i) Noted the responses to the public consultation as outlined in the report and in Appendix 1; and
- (ii) Agreed to adopt the North East Rail and Metro Strategy, revised in light of consultation feedback and set out in Appendix 2, as one of the suite of strategies expanding on the North East Transport Plan.

9. TRANSPORT PLAN PROGRESS REPORT

The Committee considered 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.'

Following the award of £163.5m indicative funding for the region's Bus Service Improvement Plan, work is underway to meet the new timescales and requirements set out in the funding letter.

£7.3m of one off funding has been awarded from the Local Transport Fund to support the Metro operation in 2022/23 as it recovers from the impact of Covid, with £2.664m available for bus services across the region. The Government has confirmed that recovery funding will end in October 2022.

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

10. EXCLUSION OF THE PRESS AND PUBLIC

RESOLVED: The North East Joint Transport Committee agreed to exclude the press and public from the meeting during consideration of item 11.

11. MINUTES OF THE CONFIDENTIAL MEETING HELD ON 15 MARCH 2022

The minutes were agreed as a correct record.

12. DATE OF NEXT MEETING

The next meeting of the Joint Transport Committee will be held on 12 July at 2.30pm at Gateshead Civic Centre.

North East Joint Transport Committee

Date: 12 July 2022

Subject: 2021/22 Revenue Budget and Capital Programme Outturn

Report of: Chief Finance Officer

Executive Summary

This report provides the North East Joint Transport Committee (JTC) with the outturn position in relation to the 2021/22 Transport Revenue Budget and Transport Capital Programme.

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

The outturn position shows that expenditure was within the revised budgets approved by the JTC. 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 has been applied by each organisation to the provision of public transport services.

Durham County Council, Northumberland County Council and Nexus underspent against the revenue grant awarded by the JTC in year by £0.935m; £0.589m; and £4.255m respectively. All three organisations incurred lower than budgeted costs in relation to Concessionary Travel, arising from a change in government guidance from January 2021 which allowed reimbursement to be reduced by an equivalent to the reduction in services operated by bus companies. There were further one-off items received by Nexus (totalling £5.14m) which increased the underspend to £9.395m, including additional Metro revenue grant support, a capital receipt and tax credits.

The Tyne Tunnels accounts outturn was a breakeven position following the funding of capital expenditure on the Tyne Pedestrian and Cycle Tunnels and a transfer to the Tyne Tunnel earmarked reserves of £0.562m.

Expenditure on the Transport North East Core budget was within budget with a small underspend to the year end of £0.018m against the revised budget (£0.092m compared to the original budget). Expenditure on grant funded activity and specific projects was also within budget, with some reprofiling required into 2022/23.

The report identifies that total capital expenditure incurred on Transport schemes was £113.112m during 2021/22 against the revised programme of £141.912m, an underspend of £28.800m (20%). The majority of this underspend relates to slippage in relation to the Transforming Cities Fund Tranche 2 programme (£5.479m), Metro Asset Renewal Plan (£6.669m), Metro Fleet Replacement (£5.009m) and Metro Flow (£6.501m). There has been no loss of funding arising from the slippage and the works are forecast to take place in 2022/23, requiring the budgets to be reprofiled.

Most of the capital works undertaken in the year have been funded through government grants awarded (£1111.455m) with elements of the Nexus capital programme and the Tyne Pedestrian and Cyclist Tunnels works funded by reserves (£1.657m) held specifically for this purpose.

At 31 March 2022 JTC reserves totalled £30.902m, including amounts held on behalf of Nexus, with £29.969m earmarked for specific projects or service areas and a £0.933m unallocated general reserve. The position at 31 March 2021 was that the JTC reserves totalled £30.392m, with £29.559m earmarked for specific projects and service requirements and a £0.833m unallocated general reserve balance.

Recommendations

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

1. Background Information

- 1.1 At its meeting held on 19 January 2021, the JTC agreed a Transport levy budget for 2021/22 of £84.095m, with regular updates, including the forecast outturn position being reported to the JTC over the last twelve months. This report presents the final outturn position for the 2021/22 financial year.
- 1.2 In January 2021, the JTC also approved the initial 2021/22 capital programme totalling £152.674m. The capital programme was then updated to take account of adjustments for slippage from 2020/21 and for new grant approvals made after the original capital programme was agreed, which was reported at the meeting in July. The programme was subsequently updated in reports to the JTC in November 2021, January 2022 and March 2022.

2. Proposals

Transport Revenue Budget Summary

- 2.1 The table below summarises the outturn position against the net Transport Levy budget (i.e. the net cost to the JTC after external income) for 2021/22. The levies and grants to Durham, Northumberland and Nexus are fixed for the year, but details of how the grants were applied by each organisation to the provision of public transport services is set out in more detail in the following sections. Expenditure on the Retained Transport Levy budget was below the revised budget with a variance of £0.100m due to lower financing charges on historic debt inherited from the Tyne and Wear Integrated Transport Authority. It is proposed that up to £0.080m of this is set aside to fund expenditure in 2022/23 on one-off items – support to the regional Levelling Up Fund Bid and a Regional Freight Study. The 2022/23 budget will be updated for this and appears elsewhere on this agenda.

Table 1: Transport Levy Budget 2021/22

	2021/22 Budget	2021/22 Outturn	Variance
	£m	£m	£m
Grant to Durham	15.457	15.457	0.000
Grant to Northumberland	6.318	6.318	0.000
Grant to Nexus	57.813	57.813	0.000
Retained Transport Levy Budget	2.120	2.020	(0.100)
Contribution to Metro Futures Planning Studies budget (2021/22 only)	1.187	1.187	0.000
Tyne and Wear Levy Rebate (2021/22 only)	1.200	1.200	0.000
Total Expenditure	84.095	83.995	(0.100)

	2021/22 Budget	2021/22 Outturn	Variance
	£m	£m	£m
Transport Levies	(82.895)	(82.895)	0.000
Contribution to JTC unearmarked reserves	0.000	0.100	0.100
Contribution from Nexus reserves held by NECA	(1.200)	(1.200)	0.000

Durham

- 2.2 The following table provides a detailed breakdown of expenditure on public transport services by Durham County Council against the grant awarded by the JTC:

Table 2: Durham County Council

	2021/22 Budget	2021/22 Outturn	Variance
	£m	£m	£m
Concessionary Fares	11.932	10.924	(1.008)
Subsidised Services	2.557	2.636	0.079
Bus Stations	0.177	0.123	(0.054)
Bus Shelters	0.019	0.066	0.047
Passenger Transport Information	0.088	0.088	0.000
Staffing	0.685	0.685	0.000
Share of JTC Transport Costs	0.010	0.010	0.000
Net Expenditure	15.467	14.532	(0.935)
JTC Levy	(15.467)	(15.467)	0.000
(Surplus)/Deficit for the year	0.000	(0.935)	(0.935)

- 2.3 Expenditure for Durham County Council was £0.935m under budget, with the underspend retained by the council. The majority of this relates to Concessionary Fares where changes in government guidance from January 2021 allowed reimbursement to be reduced by an equivalent to the reduction in services. There was a reduction in expenditure arising from the closure of Durham Bus Station offset by additional repair and security costs, and additional maintenance was required on bus shelters.

Northumberland

2.4 The following table provides a detailed breakdown of expenditure on public transport services by Northumberland County Council against the grant awarded by the JTC:

Table 3: Northumberland County Council

	2021/22 Budget	2021/22 Outturn	Variance
	£m	£m	£m
Concessionary Fares	4.903	4.307	(0.596)
Subsidised Services	1.230	1.246	0.016
Bus Services	0.026	0.042	0.016
Passenger Transport Information	0.025	0.000	(0.025)
Staffing	0.134	0.134	0.000
Share of JTC Transport Costs	0.010	0.010	0.000
Net Expenditure	6.328	5.729	(0.589)
JTC Levy	(6.328)	(6.328)	0.000
(Surplus)/Deficit for the year	0.000	0.000	(0.589)

2.5 The outturn position was an underspend of £0.589m which will be retained by the council. The main area of underspend was on Concessionary Fares where, during the early part of 2021/22 the Council reduced payments to those operators not running pre Covid mileage in line with government advice. These operators were reimbursed based on the proportion of mileage operated when compared with pre covid mileage. Any shortfall is claimable by operators as part of the commercial BRG claim, which means despite the reduction in concessionary travel payment operators were no worse off. All other operators continued to be reimbursed at pre-pandemic levels to ensure the viability of routes and the operators was maintained, in line with the Cabinet Office Procurement Policy Note 02/20 – Supplier Relief.

Tyne and Wear - Nexus

2.6 In the most recent report to the JTC on 15 March 2022 (which covered the period to 11 December 2021), the forecast outturn for the year ended 31 March 2022 was reported as a deficit of £1.330m before taxation. Since that date, due to continued savings on Concessionary Travel payments to commercial operators, along with savings in bus services and support services, this position has improved significantly.

To the year end there was a surplus, before adjusting for exceptional items, of £1.575m, compared to the budgeted deficit of £2.68m – a variance (underspend) of £4.255m, as summarised in the table below.

Table 4: Nexus Outturn 2021/22

	2021/22 Budget	2021/22 Outturn	Variance
	£m	£m	£m
Concessionary Travel	38.604	35.640	(2.964)
Metro	3.299	5.288	1.989
Bus Services	13.743	11.206	(2.537)
Other	4.847	4.157	(0.690)
Total Requirement	60.493	56.291	(4.202)
NEMOL	0.000	(0.053)	(0.053)
JTC grant	(57.813)	(57.813)	0.000
(Surplus) before exceptional items	2.680	(1.575)	(4.255)
Additional DfT Grant	0.000	(3.300)	(3.300)
Capital Receipt and Tax Credits	0.000	(1.840)	(1.840)
(Surplus) after Exceptional items	2.680	(6.715)	(9.395)

2.7 In addition, there are exceptional unbudgeted items totalling £5.14m relating to:

- On 23 December 2021, DfT wrote to Nexus confirming additional grant support of £3.3m for revenue expenditure on the Metro system up to 31 March 2022, with the intention being that this would provide support in future years when Metro Rail Grant is not being increased in line with inflation;
- During the year, Nexus disposed of land at Strawberry Place in Newcastle upon Tyne. This generated a capital receipt of £1.6m which will be used for future capital investment and to settle tax liabilities in connection with the disposal; and
- During the year, Nexus recognised tax credits in relation to Research and Development activities in the prior year of £0.3m.

Taken with the surplus before exceptional items the outturn was a £6.715m surplus – a variance of £9.395m when compared with the budgeted deficit of £2.68m.

2.8 Covid-19 Support

The financial performance in 2021/22 has been impacted by the ongoing effects of the Covid-19 pandemic and included in the table above is £20.6m emergency government funding, which is summarised as follows:

- Metro - £18.0m of Light Rail Revenue Restart Grant (LRRRG) paid by the Department for Transport (DfT);

- Bus Services - £2.5m of which £1.7m was received via the Local Authority Coronavirus Bus Services Support Grant (LACBSSG) paid by DfT, together with £0.8m of additional scholars funding paid by the Department for Education (DfE); and
- Other - £0.1m for other revenue losses (including lost ferry revenue) paid by the Department for Levelling Up, Housing and Communities (DLUHC);

2.9 ENCTS and Discretionary CT

The underspend across both statutory and discretionary elements of the CT budget is £3.0m. In line with government guidance Nexus reimbursed bus operators in respect of concessionary fares based on the number of services operating rather than at budgeted levels. The saving generated by reducing payments was £2.5m with operators running an average of 90% of services throughout the year. The remaining saving of £0.5m is due to higher than budgeted scholars pass income and savings on support services costs.

Metro

- 2.10 In terms of fare and commercial revenue, Metro generated £33.6m during 2021/22 which was some £3.6m higher than budget. Whilst this meant that less LRRRG was claimed from DfT to assist with recovery from Covid-19 (paragraph 2.8 refers), income for the year (including grants) was still £0.7m higher than budgeted levels.
- 2.11 In terms of expenditure, the largest variance was in connection with High Voltage Power (HVP) where costs exceeded budget by £3.0m because of the volatility in the energy market. This was largely offset by a combination of savings in contingencies (£1.8m), some of which had been set aside specifically because of the uncertainty relating to HVP (both price and also consumption where service provision uncertainties due to Covid-19 had been factored into the base budget calculations), employee costs (£0.4m) and Network Rail track access charges (£0.3m).
- 2.12 There were other minor variances across a range of other expenditure budgets amounting to a combined saving of £0.2m. This results in an overall break-even position for Metro for the year. This is before the additional costs described in paragraph 2.13, for which an equivalent amount will be released from a specific reserve earmarked to accommodate these additional costs.
- 2.13 As previously reported, the markets' response to the terms and conditions of the Metrocar Maintenance Agreement (MMA) reflected the amount of risk that external contractors estimated they were exposed to whilst the old fleet is phased out and prior to the new fleet becoming fully operational. As a consequence, during 2021/22 Nexus incurred an additional £2.0m in its contract with Stadler Rail Services. This will be met from a reserve specifically established to accommodate these additional costs.

Bus Services

- 2.14 The underspend in bus services has been caused by three main factors. Due to efficient scheduling, expenditure on securing services was £1.1m less than budget with a specific contingency set aside at budget setting not required; fare revenue was £1.0 better than budget and the residue of Better Bus Funding (BBF) grant

amounting to £0.4m was applied during the year (BBF had been received prior to the Covid-19 pandemic but had not been used as originally intended).

- 2.15 Although costs were less than budget and revenue was higher than budget, LACBSSG was still receivable and the amount claimed was maximised (paragraph 2.8 refers) in the year.

Other

- 2.16 Other includes Ferry, Local Rail, Bus Information and Passenger Transport Information. Ferry revenue was £0.1m higher than budget (but remains 27% lower than pre-Covid levels) and DLUHC funding was as budgeted at £0.1m (paragraph 2.8 refers). There were £0.1m costs higher than budget, mostly due to additional surveys and repairs to the ferry vessels and landings.

- 2.17 In addition, there were savings of £0.7m across a wide range of budget headings, including higher bus station departure charges received in year, reduced shelter maintenance costs, lower real time information costs and lower overhead/support service costs.

North East Metro Operations Limited (NEMOL)

- 2.18 NEMOL ceased trading in the prior year following the transfer of its remaining employees to Stadler Rail Services. In advance of being wound up, NEMOL made a small surplus of £0.053m in 2021/22.

Tyne Tunnels

- 2.19 The Tyne Tunnels are operated as a ringfenced account, so all costs associated with the tunnels are fully met from toll income and Tyne Tunnels reserves, with no call on the levy or other public funding. The outturn position for the year is breakeven with a net transfer to the tunnel reserves of £0.562m.

Table 5: Tyne Tunnels Revenue Account

	2021/22 Original Budget	2021/22 Revised Budget	2021/22 Outturn	Variance
	£m	£m	£m	£m
Tolls Income	(30.004)	(27.855)	(28.584)	(0.729)
TT2 Contract	21.707	20.411	20.011	(0.400)
Employees	0.093	0.110	0.107	(0.003)
Pensions	0.054	0.050	0.049	(0.001)
Premises	0.021	0.021	0.050	0.029
Support Services	0.129	0.155	0.135	(0.020)
Supplies and Services	0.095	0.086	0.098	0.012
Financing Charges	8.195	7.323	6.155	(1.168)
Interest/Other Income	(0.050)	(0.061)	(0.050)	0.011
Repayment from TWITA for temporary use of reserves	(0.240)	(0.240)	(0.240)	0.000
Capital Expenditure Funded from Revenue – Tyne Pedestrian and Cycle Tunnels	0.000	1.200	0.790	(0.410)
Repayment of funding swap	0.000	0.917	0.917	0.000
Transfer to/(from) Tyne Tunnels reserves	0.000	(2.117)	0.562	2.679
(Surplus)/Deficit for the year	0.000	0.000	0.000	0.000

- 2.20 Tolls income was higher than forecast as traffic has picked up significantly during the latter part of the financial year and in February and March 2022 was around 95-98% of pre-pandemic levels. The contract payment to TT2 was lower than budgeted due to an overstatement in the budget calculations for the period from January – March 2022. This has been corrected in future budget estimates and had no impact on actual payments made which were correct.
- 2.21 Premises costs were higher than forecast due to backdated electricity charges relating to the Tyne Pedestrian and Cycle Tunnels.
- 2.22 Financing Charges were lower than the budget, as the budget had included additional provision for repayment of principal, in excess of the amount required in line with the Authority's Minimum Repayment of Principal (MRP) statement – in effect an accelerated repayment of debt relating to the tunnels. The MRP has been set aside for

repayment of principal for 2021/22 and all interest payments have been met, but the additional repayment has instead been transferred to the Tyne Tunnels reserves at the year end in order to restore these to the minimum level deemed prudent (which equates to approximately 3 months of toll income or circa. £10m).

- 2.23 There was an underspend against the capital budget allocation (funded from Tyne Tunnels Reserves) for the Tyne Pedestrian and Cycle Tunnels refurbishment, as discussed in paragraphs 2.48-2.50 of this report.

Transport North East

- 2.24 Transport North East (TNE) supports the JTC, providing relevant information to support policy choices and to deliver policies at a regional level. Since its creation in 2018, TNE has been working at capacity to develop and lead on the delivery of a very broad and ambitious transport programme on behalf of the region. NECA and NTCA together form one of the largest areas in the country by population and geographical size. TNE acts as the strategic transport body that supports both Combined Authorities (via the JTC).
- 2.25 Expenditure against the Core budget is within the revised budget for the year, with an underspend of approximately £0.043m arising from reduced staffing costs arising from vacancies during the year. The underspend will be added to reserves and is available to fund expenditure in future years.
- 2.26 The outturn position is summarised in the tables below:

Table 6: Transport North East Core Budget – Outturn 2021/22

	2021/22 Original Budget	2021/22 Revised Budget	2021/22 Outturn	Variance
	£m	£m	£m	£m
Employee costs	0.758	0.656	0.617	(0.039)
Transport Plan/Strategy Work	0.070	0.096	0.123	0.027
Research and Development	0.100	0.042	0.036	(0.006)
Travel and Miscellaneous	0.013	0.017	0.011	(0.006)
IT/Equipment/Accommodation	0.011	0.006	0.008	0.002
Total Expenditure	0.952	0.817	0.796	(0.022)
Local Transport Plan grant	(0.500)	(0.500)	(0.500)	0.000
Retained Transport Levy	(0.187)	(0.187)	(0.187)	0.000
External Funding for specific posts	(0.216)	(0.155)	(0.152)	0.003
Total Income	(0.903)	(0.842)	(0.839)	0.003
Net Expenditure to be funded from Reserves	0.049	(0.025)	(0.043)	(0.018)
TNE reserve	(0.005)	0.025	0.043	0.018
Go Smarter legacy funds – Transport Plan	(0.044)	0.000	0.000	0.000

2.27

Table 7: Transport North East Grants and Projects – Outturn 2021/22

	2021/22 Original Budget	2021/22 Revised Budget	2021/22 Outturn	Variance
	£m	£m	£m	£m
Go Ultra Low – Revenue	0.000	0.002	0.002	0.000
TCF Tranche 2 programme management	0.361	0.259	0.216	(0.043)
Covid-19 grants	0.000	3.734	3.961	0.227
Active Travel Planning	0.000	1.192	0.436	(0.756)
BSIP/ Enhanced Bus Partnership	0.160	1.208	0.631	(0.577)
Metro Futures Planning Studies	1.187	0.581	0.314	(0.267)
Rail Development	0.000	0.224	0.204	(0.020)
Total Expenditure	1.708	7.200	5.764	(1.436)
ERDF grant - Go Ultra Low - Revenue	0.000	(0.002)	(0.002)	0.000
TCF grant	(0.361)	(0.259)	(0.216)	0.043
Covid-19 grants	0.000	(3.734)	(3.961)	(0.0227)
ATF Revenue grant	0.000	(1.192)	(0.436)	0.756
DfT Bus Capacity grant	0.000	(1.208)	(0.631)	0.577
Metro Futures Planning Studies - funded by Nexus contribution	(1.187)	(0.581)	(0.314)	0.267
Rail Administration Grant (via Nexus)	0.000	(0.256)	(0.204)	0.052
Total Grants and Contributions	(1.548)	(7.232)	(5.742)	1.468
Net Expenditure (to)/from Reserves	0.160	(0.032)	0.000	0.032

Transport Capital Programme Outturn 2021/22

2.28 A summary of the Transport Capital Programme for 2021/22 is set out in the table below, with further details provided in the following sections.

Table 8: Transport Capital Programme Outturn 2021/22

	2021/22 Original Budget	2021/22 Revised Budget	2021/22 Outturn	Variance
	£m	£m	£m	£m
TCF Tranche 1	0.248	0.901	0.897	(0.004)
TCF Tranche 2	34.735	12.939	7.460	(5.479)
Active Travel Fund Tranche 2	7.239	3.392	1.187	(2.205)
EV Charging	0.000	0.257	0.027	(0.230)
Ultra Low EV – Taxis	0.000	0.049	0.001	(0.048)
Metro Asset Renewal Plan	19.222	23.684	17.015	(6.669)
Metro Fleet Replacement	63.069	64.215	59.206	(5.009)
Nexus Other Capital Projects	8.252	3.304	1.140	(2.164)
Metro Flow	8.100	20.632	14.131	(6.501)
Tyne Tunnels	0.500	1.200	0.791	(0.409)
Local Transport Plan	11.309	11.339	11.257	(0.082)
Total	152.674	141.912	113.112	(28.800)

Transforming Cities Fund

2.29 The North East has been awarded £208m grant from the Transforming Cities Fund (TCF), of which £10m was for Tranche 1 and £198m was for Tranche 2. Within the Tranche 2 schemes, £104m is for schemes where the decision making on 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 DfT.

2.30 Outturn expenditure on the Tranche 1 schemes, some of which saw delays due to the Covid-19 pandemic but are in the main fully complete, was £0.897m against the revised programme budget of £0.901m.

2.31 Expenditure on Tranche 2 schemes to the year end was £7.460m, of which £1.700m related to Metro Flow and is included in that section of this report. The remaining £5.760m was primarily on the Durham Bus Station, Sunderland Station,

North Shields Transport Hub and ITS projects.

Active Travel Fund Tranche 2

- 2.32 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 £7.239m was capital. £0.262m of the capital funding was used in 2020/21. £1.187m of the grant was paid out to Local Authorities on receipt of grant claims following Grant Funding Agreements being put in place for each scheme. One of the total eight schemes is complete and a further five are in delivery. The remaining GFAs will be in place and remaining funding claimed during 2022/23.

Electric Vehicle (EV) charging infrastructure

- 2.33 Using funding of £0.390m allocated through the Local Growth Fund, the JTC are currently in the process of delivering a number of new EV Charging points around the north east, one in each local authority, based on a prioritisation process set out in an Enabling Study completed last year. Expenditure to the year end was £0.027m.

Ultra-Low Emission Vehicles – Taxi Project

- 2.34 Eight of the ten dedicated electric vehicle chargers for the taxi and private hire industry (funded by the Office of Zero Emission Vehicles) are now live and operational. Remaining budget will be carried over into 2022/23 for the completion of the project, with engagement events planned to encourage the switch to electric vehicles in the taxi trade planned for 2022.

Nexus Capital Programme

- 2.35 Nexus' revised capital programme for 2021/22 provides for gross expenditure of £1111.835m. By comparison the 2021/22 programme actual outturn was £91.493m.
- 2.36 Importantly, the under spend and associated programme implications can be accommodated and no grant funding will be clawed back. The £20.343m net underspend, together with how the 2021/22 capital programme is financed, is detailed below:

Table 9: Total Nexus Capital Programme

	2021/22 Original Budget	2021/22 Revised Budget	2021/22 Outturn	Variance
	£m	£m	£m	£m
Metro Asset Renewal Programme	19.222	23.684	17.015	(6.669)
Fleet Replacement	63.069	64.215	59.206	(5.009)
Other Capital Projects	8.229	3.304	1.140	(2.164)
Metro Flow	8.100	20.632	14.131	(6.501)
Total Expenditure	98.620	111.835	91.492	(20.343)
Funding:				
Metro Rail Grant (DfT)	20.000	20.000	20.000	0.000
Metro Rail Grant (DfT) b/fwd into 2019/20	(4.000)	(4.000)	(4.000)	0.000
Fleet Replacement Grant (DfT)	59.666	54.100	54.100	0.000
Transforming Cities Grant	8.606	21.954	9.369	(12.585)
Additional DfT Grant	0.000	0.000	10.000	10.000
LTP Grant	2.604	2.604	0.736	(1.868)
LEP Grant	5.181	0.000	0.065	0.065
Fleet Reserves	3.403	12.729	0.000	(12.729)
Highways Challenge Fund	1.000	1.000	0.356	(0.644)
Nexus Reserves	2.160	1.600	0.866	(0.734)
Over Programming	0.000	1.848	0.000	(1.848)
Total Funding	98.620	111.835	91.492	(20.343)

2.37 During the final quarter of the year, Nexus received another £10.000m of capital grant from DfT. In the approval letter from DfT dated 23 December 2021, these funds were described as 'additional' and 'for capital works and expenditure on the Metro system up to 31 March 2022'. Further, DfT confirmed that 'this award replaces Nexus' local funding from 2021/22, or other capital grant, the terms which allow it to be carried forward into 2022/23 and will be retained by Nexus in either usable reserves or as capital grant received in advance at the year-end, to be used in future years'. The additional grant is shown in the table above and all £10.000m

has been applied in order to help finance the 2021/22 capital programme.

2.38 This has meant the following adjustments to how other elements of the capital programme is financed:

- £5.106m has replaced reserves previously earmarked for the Fleet Replacement programme;
- The balance, £4.894m has replaced other grant funding which will be carried forward into 2022/23:
 - £1.868m in regards LTP funding; and
 - £3.026m in regards TCF funding.

Metro Asset Renewal Programme (MARP)

2.39 The MARP 2021/22 actual outturn was £17.015m against the revised budgeted profile of £23.684m. The £6.7m underspend includes £4.9m projects deferred into future years, together with £1.8m net savings have taken £0.7m of cost pressures relating to Callerton Park and Ride (which was previously expected to be TCF funded), circuit breakers and re-railing of QEII bridge into account. The March grant claim was £2.010m, compared to the forecast £2.012m and therefore within the +/- 5% DfT target.

2.40 MRG capital grant totalling £16.000m was claimed by year end. This represents the total funding available in 2021/22. The remaining £1.015m of actual spend will be funded from £0.659m of local funding (LTP), plus £0.356m Highways Challenge Fund grant for Tanners Bank.

Fleet Replacement Programme (FRP)

2.41 Actual 2021/22 outturn was £59.206m against the revised budget profile of £64.215m. The majority of the £5.009m underspend relates to less contingency being applied than budgeted and a realignment of contractor activities on the Gosforth Depot project.

2.42 The £59.206m actual outturn is funded from the £54.100m DfT Fleet Replacement grant available in 2021/22, with the balance, £5.106m, funded from the additional £10.000m DfT grant received in year, which provides a corresponding £5.106m saving against reserves previously earmarked to fund the Fleet Replacement Programme (paragraphs 2.37 and 2.38 refer).

Other Capital Projects (OCP)

2.43 In 2021/22, Other Capital Projects had a budget of £3.304m comprising £1.332m Transforming Cities Fund car park projects, £1.226m Ferry North Landing relocation, £0.515m Ferry vessels and infrastructure and £0.241m non-Metro digital projects.

2.44 Cumulative actual outturn for 2021/22 was £1.140m, resulting in a £2.164m underspend. This has not resulted in any loss of resource and is mainly as a result of delays in progressing the Ferry North Landing relocation and the Ferry Vessels

works.

Metro Flow (MFL)

- 2.45 Cumulative actual outturn was £14.131m against an expected cumulative spend of £20.632m, resulting in a £6.501m underspend. The variance relates to contractor delays to undertaking planned surveys, together with a re-costed programme from the contractor and reduced spend on programme management time, contingency and de-vegetation works.
- 2.46 The outturn will be funded by £9.237m TCF grant (deferring £11.395m into 2022/23) with the balance i.e. £4.894m, funded from the £10.000m additional DfT Grant received in year (paragraphs 2.37 and 2.38 refers), thereby freeing up capital resource for use in 2022/23.
- 2.47 In addition, in relation to the acquisition of Network Rail infrastructure, a letter confirming Secretary of State approval of the necessary £4.900m was received from DfT in April 2022. This grant will be applied in 2022/23.

Tyne Tunnels

- 2.48 Expenditure totalling £0.791m was incurred during the year on the Tyne Pedestrian and Cycle Tunnels refurbishment. Due to delays in delivery of parts to complete the inclined lifts, unused funding of £0.410m will be carried forward to 2022/23 when the works will be completed. This work is funded by Tyne Tunnels reserves.
- 2.49 The completion and certification of the inclined lifts is now the only major outstanding work required to complete the full refurbishment. Once this is completed, the Tunnels will be handed over from the Newcastle City Council project team, who are continuing to oversee their operation, to TT2 Ltd, who will then manage the operation of the Tunnels for the remainder of the Concession.
- 2.50 New contractors were appointed in 2021 and work has taken place through the 2021/22 financial year, with good progress being made on 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 these have been ordered, but due to supply chain issues there is a delay to the works until these can be supplied and installed which will now take place during 2022/23.

Local Transport Plan

- 2.51 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.
- 2.52 The outturn for 2021/22 was a small underspend of £0.087m due to some funding from the public transport schemes allocation being carried over to 2022/23 which is

permitted under the grant conditions.

Capital Programme Financing

2.52 Outturn capital expenditure for 2021/22 will be financed as follows:

Table 10: Capital Programme Financing 2021/22

	2021/22 Original Budget	2021/22 Revised Budget	2021/22 Outturn	Variance
	£m	£m	£m	£m
Government Grants	147.174	131.393	111.455	(19.938)
Reserves	5.500	10.519	1.657	(8.862)
Total	152.674	141.912	113.112	(28.800)

JTC Reserves

2.53 The table below shows the outturn position at 31 March 2022.

Table 11: JTC Reserves

	1 April 2021	Budgeted 31 March 2022	Actual 31 March 2022	Variance
	£m	£m	£m	£m
JTC unallocated reserve	(0.833)	(0.776)	(0.933)	(0.157)
Tyne Tunnels reserve	(9.222)	(8.022)	(9.782)	(1.760)
Go Smarter legacy	(0.044)	(0.044)	(0.044)	(0.000)
Regional Transport Team	(0.141)	(0.166)	(0.184)	(0.018)
Metro and Local Rail Studies	(0.754)	(1.360)	(1.683)	(0.323)
Metro Asset Renewal Plan	(9.271)	(8.071)	(8.108)	(0.037)
Metro Fleet Renewal	(10.127)	(10.127)	(10.168)	(0.041)
Total	(30.392)	(28.566)	(30.902)	(2.299)

3. Reasons for the Proposals

3.1 This report is for information, to enable the JTC to fulfil its role of monitoring transport budgets and the Transport Capital Programme on behalf of the two combined authorities.

4. Alternative Options Available

4.1 This report is for information.

5. Next Steps and Timetable for Implementation

5.1 The impact of the outturn position has been reflected in the revised forecasts for 2022/23 which are the subject of a separate report elsewhere on this agenda.

6. Potential Impact on Objectives

6.1 There are no impacts on objectives arising from this report which is for information.

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 Joint Transport Committee with a summary of outturn expenditure against the budget and capital programme approved in January 2021 and revised by the JTC during the year. There are no financial decisions arising from this report.

8. Legal Implications

8.1 There are no specific legal implications arising from this report which is for information.

9. Key Risks

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

10. Equality and Diversity

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

11. Crime and Disorder

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

12. Consultation/Engagement

12.1 The Revenue Budget for 2021/22 was subject to a period of consultation and engagement as part of the approval process. Detailed budget proposals are subject to consultation as appropriate, which is organised by the relevant delivery body.

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 Revenue Budget 2021/22 – January 2021 JTC <https://northeastca.gov.uk/wp-content/uploads/2021/01/2021.01.19-JTC-Public-Agenda-1.pdf>

Revenue Budget Forecast of Outturn – March 2022 JTC
<https://northeastca.gov.uk/wp-content/uploads/2022/03/2022.03.15-JTC-Public-Agenda-Pack-FINAL.pdf>

Capital Programme 2021/22 – January 2021 JTC <https://northeastca.gov.uk/wp-content/uploads/2021/01/2021.01.19-JTC-Public-Agenda-1.pdf>

Capital Programme Forecast of Outturn – March 2022 JTC
<https://northeastca.gov.uk/wp-content/uploads/2022/03/2022.03.15-JTC-Public-Agenda-Pack-FINAL.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:

18. Glossary

ATF – Active Travel Fund

BBF – Better Bus Fund

DfE – Department for Education

DfT – Department for Transport

DLUHC – Department for Levelling Up, Housing and Communities

ENCTS – English National Concessionary Travel Scheme

EV – Electric Vehicles

FRP – Fleet Replacement Programme

HVP – High Voltage Power

JTC – Joint Transport Committee

LACBSSG – Local Authority Coronavirus Bus Services Support Grant

LRRRG – Light Rail Revenue Restart Grant
MARP – Metro Asset Renewal Plan
MFL – Metro Flow
MMA – Metrocar Maintenance Agreement
MRP – Minimum Revenue Provision
NECA – North East Combined Authority
NEMOL – North East Metro Operations Limited
NTCA – North of Tyne Combined Authority
OCP – Other Capital Projects
TNE – Transport North East

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North East Joint Transport Committee

Date: 12 July 2022

Subject: 2022/23 Revenue Budget and Capital Programme Update and 2023/24 Budget Setting Process

Report of: Chief Finance Officer

Executive Summary

This report provides the North East Joint Transport Committee (JTC) with the initial forecast of outturn for the 2022/23 Transport Revenue and Capital budgets, based on the position as at the end of May 2022 and factoring in the outturn position for 2021/22.

The report covers all areas of the revenue and capital budgets including the Transport Levies and grants to Durham, Northumberland and Nexus, Transport North East and the Tyne Tunnels.

Any over or underspends against the budgets for the three main organisations delivering transport services on behalf of the JTC are retained within the reserves of these organisations and will be considered in the setting of the transport budgets for future years.

Durham and Northumberland County Councils are both currently forecasting that expenditure will be in line with the budget set for the year.

Nexus are reporting that they will address the significant cost pressures they are facing (arising mainly in relation to High Voltage power costs, increased security costs and increased secured services costs arising from significant cuts to the commercial bus network) through additional grant awarded by DfT and savings on the Network Rail Track Access Agreement, and that the use of reserves is forecast to be in line with the budgeted figure at £5.600m.

Increased expenditure on staffing in Transport North East (TNE) will be met through use of grant funding awarded after the original budget for the year was set. The budget for grant funded and project activity will be updated to include additional expenditure on Active Travel through the Capability Fund, increased expenditure on the Bus Service Improvement Plan/Enhanced Partnership arising from revised timescales for the implementation of the plan, and the administration of the Local Transport Fund grant to Durham, Northumberland and Nexus.

The forecast is anticipated to be largely in line with budget on the Tyne Tunnels revenue account, with use of reserves to fund capital expenditure on the Tyne

Pedestrian and Cycle Tunnels partly offset by reduced financing charges on debt relating to the New Tyne Crossing.

This report also provides the JTC with details of the 2022/23 capital programme plans, together with expenditure and forecasts of the outturn position based on the position as at the end of May 2022. Included in the revised budget is the impact of the 2021/22 outturn position where a number of schemes underspend last year and for which the budget has been reprofiled into the current year.

The report identifies that total capital expenditure on Transport capital schemes of £317.801m is forecast and it is proposed that a revised programme budget, taking into account the 2021/22 outturn and new grant approvals such as Active Travel Fund Tranche 3 is agreed by the JTC. This is an increase of £43.420m compared to the original programme for the year.

Expenditure to the end of May 2022 totalled £6.794m – 2.1% of the forecast total capital expenditure for the year.

Most of the capital works during the year will be funded through government grants awarded (£313.148m forecast) with elements of the Nexus capital programme and the Tyne Pedestrian and Cyclist Tunnels works funded by reserves (£4.653m forecast) held specifically for this purpose.

Finally, the report provides a summary of the budget-setting process for 2023/24 and beyond with key dates for the Committee to consider and agree budget proposals.

Recommendations

The North East Joint Transport Committee is recommended to:

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

1. Background Information

- 1.1 At its meeting held on 2 February 2022, the JTC agreed a Transport levy budget for 2022/23 of £87.201m. This report presents an update against the original budget with the forecast of outturn prepared based on the position at 31 May 2022.
- 1.2 On 18 January 2022, the JTC also approved the initial 2022/23 capital programme totalling £279.744m. This report presents an update against the original programme with the forecast prepared based on the position at 31 May and taking into account the 2021/22 outturn position.

2. Proposals

Transport Revenue Budget Summary

- 2.1 The table below summarises the forecast outturn position against the net Transport Levy budget (i.e. the net cost to the JTC after external income) for 2022/23. The levies and grants to Durham, Northumberland and Nexus are fixed for the year, but details of how the grants will be applied by each organisation to the provision of public transport services is set out in more detail in the following sections.

Table 1: Transport Levy Budget 2022/23 Forecast of Outturn

	2022/23 Original Budget	2022/23 Revised Budget	2022/23 Forecast	Expend. to 31 May 2022
	£m	£m	£m	£m
Grant to Durham	15.609	15.609	15.609	2.602
Grant to Northumberland	6.347	6.347	6.347	1.058
Grant to Nexus	63.125	63.125	63.125	10.521
Retained Transport Levy Budget	2.120	2.120	2.120	0.530
Total Expenditure	87.201	87.201	87.201	14.711
Transport Levies	(87.201)	(87.201)	(87.201)	(14.534)
Contribution (to)/from JTC unearmarked reserves	0.000	0.000	0.000	0.177

Durham

- 2.2 The following table provides a detailed breakdown of expenditure on public transport services by Durham County Council against the grant awarded by the JTC:

Table 2: Durham County Council Forecast of Outturn 2022/23

	2022/23 Original Budget	2022/23 Forecast	Variance	Expend. to 31 May 2022
	£m	£m	£m	£m
Concessionary Fares	12.205	11.455	(0.750)	0.003
Subsidised Services	2.688	3.438	0.750	0.393
Bus Stations	0.176	0.176	0.000	0.364
Bus Shelters	(0.268)	(0.268)	0.000	0.065
Passenger Transport Information	0.089	0.089	0.000	0.004
Staffing	0.719	0.719	0.000	0.120
Share of JTC Transport Costs	0.010	0.010	0.000	0.000
	15.619	15.619	0.000	0.949

- 2.3 Durham County Council are forecasting expenditure to be in line with the budget for 2022/23. An anticipated underspend on Concessionary Fares, in line with current guidance which allows reimbursement in line with actual services operated, will be used to support the passenger transport network.

Northumberland

- 2.4 The following table provides a detailed breakdown of expenditure on public transport services by Northumberland County Council against the grant awarded by the JTC:

Table 3: Northumberland County Council Forecast of Outturn 2022/23

	2022/23 Original Budget	2022/23 Forecast	Variance	Expend. to 31 May 2022
	£m	£m	£m	£m
Concessionary Fares	4.931	4.931	0.000	0.363
Subsidised Services	1.230	1.230	0.000	0.144
Bus Services	0.028	0.028	0.000	(0.001)
Passenger Transport Information	0.025	0.025	0.000	0.000
Staffing	0.133	0.133	0.000	0.022
Share of JTC Transport Costs	0.010	0.010	0.000	0.000

	6.357	6.357	0.000	0.528
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2.5 At this early stage in the year, Northumberland County Council are forecasting that the 2022/23 budget will break even, but this is being closely monitored due to increased cost pressures being incurred by/and operational pressures on operators.

Tyne and Wear - Nexus

2.6 For 2022/23 a balanced budget was set, following the JTC approval of a number of measures to enable Nexus to do this, including a 6.75% (£4.125m) increase in the Tyne and Wear transport levy and planned use of £5.6m of Nexus' reserves.

2.7 Since the development of the budget proposal, a range of financial challenges have arisen; notably the cost of high voltage power, security (in response to acute anti-social behaviour across the network), monitoring fraudulent travel, and pay and contract price inflation. In addition, there are significant cuts in commercial bus services across the region which have already been implemented or will be over the coming weeks.

2.8 At the same time, the DfT announced a further support package, called the Local Transport Fund (LTF), which will run for six months until 4 October 2022. The region was subsequently advised it will receive an allocation of £9.924m, split £7.300m for light rail (Metro) and £2.664m for bus services across Tyne and Wear, Northumberland and County Durham.

2.9 The DfT have confirmed that they have opted not to ringfence the money between transport modes, giving LTAs autonomy to decide how best to spend this funding across their transport system. The vast majority of this funding will be required to mitigate the financial pressures of Nexus described in paragraph 2.7 therefore the proposed allocation for Tyne and Wear is £8.825m, subject to discussion at the JTC.

2.10 In addition to this, after Nexus had set its budget for 2022/23, the DfT confirmed that the Metro Rail Grant (MRG) Revenue, would in fact be indexed (although only effective from 1 April 2022), to assist with the inflationary pressures Nexus is facing and therefore resulting in additional funding of £0.600m.

2.11 Finally, a significant item of expenditure in the Metro budget is the Network Rail Track Access Agreement. It was recently identified that reductions in interest rates has meant that Nexus have overpaid on the debt that financed the Sunderland extension in 2002 and therefore the remaining payments under this agreement have been renegotiated. This results in a saving of £1.186m against the 2022/23 budget, which will also be available to fund the financial challenges described in paragraph 2.7.

2.12 The changes described above have had the following impact on the forecast for Nexus for 2022/23:

Table 4: Nexus Forecast of Outturn 2022/23

	2022/23 Original Budget	2022/23 Forecast	Variance	Expend. to P1 (May 2022)
	£m	£m	£m	£m
Concessionary Fares	31.085	31.155	0.070	2.544
Metro	17.396	25.407	8.011	2.094
Bus Services	15.227	17.608	2.381	1.077
Other	5.017	5.166	0.149	0.400
Total Expenditure	68.725	79.336	10.611	6.115
JTC Grant from Levy	(63.125)	(63.125)	0.000	(5.188)
LTF Allocation	0.000	(8.825)	(8.825)	(0.725)
Additional MRG	0.000	(0.600)	(0.600)	(0.049)
Efficiency Savings	0.000	(1.186)	(1.186)	(0.097)
Total Income	(63.125)	(73.736)	(10.611)	(6.059)
Reserves	(5.600)	(5.600)	0.000	(0.056)

- 2.13 This shows that at the end of Period 1, Nexus is still expecting to need to use £5.600m of reserves in order to balance the budget for the year, largely because of the receipt of additional government funding of £9.425m (£8.825m of which is non-recurring) and efficiency savings of £1.186m.
- 2.14 The £10.611m overspend against the original budget estimates is made up of the following:
- £4.104m estimated pressure on high voltage power;
 - Additional provision for security to tackle anti-social behaviour on the network of £1.500m;
 - Bus interventions in response to the significant cuts by commercial operators of up to £2.281m; and
 - £2.726m in respect of other inflation to accommodate pressures in relation to pay and contract prices together with fare revenue falling short of budget.
- 2.15 At the end of period 1, concessionary fares is broadly in line with budget assumptions. Metro fare revenue (including car park and PFN income) in the period was £3.262m which exceeded the budget by £0.137m (4%) which was set based on 84% of pre-Covid levels.

- 2.16 Bus commercial revenue to the end of period 1 is £0.201m which is £0.049m higher than budget. Other includes Ferry, and to the end of period 1 ferry revenue is £0.037m which is £0.002m higher than budget.

Tyne Tunnels

- 2.17 The Tyne Tunnels are operated as a ringfenced account, so all costs associated with the tunnels are fully met from toll income and Tyne Tunnels reserves, with no call on the levy or other public funding.

Table 5: Tyne Tunnels Revenue Account Forecast of Outturn 2022/23

	2022/23 Original Budget	2022/23 Forecast	Variance	Expend. to 31 May 2022
	£m	£m	£m	£m
Tolls Income	(32.715)	(32.551)	0.164	(5.075)
TT2 Contract	24.322	24.200	(0.122)	3.779
Employees	0.142	0.131	(0.011)	0.019
Historic Pensions	0.050	0.050	0.000	0.008
Premises	0.014	0.062	0.048	0.000
Support Services	0.155	0.131	(0.024)	0.000
Supplies and Services	0.195	0.157	(0.038)	0.010
Financing Charges	8.140	7.945	(0.195)	0.000
Interest/Other Income	(0.065)	(0.065)	0.000	0.000
Repayment from TWITA for temporary use of reserves	(0.240)	(0.240)	0.000	(0.240)
Capital Expenditure Funded from Revenue – Tyne Pedestrian and Cycle Tunnels	0.000	0.410	0.410	0.022
Transfer to/(from) Tyne Tunnels reserves	0.002	(0.230)	(0.232)	1.477
(Surplus)/Deficit for the year	0.000	0.000	0.000	0.000

- 2.18 Traffic levels at the Tyne Tunnels have continued to recover, achieving pre-pandemic levels in May. Tolls income (and, correspondingly, contract payments to TT2 Ltd) for the year is currently forecast to be largely in line with the budget and will be kept under review during the year.

- 2.19 Financing charges are forecast to be below the original budget due to lower interest

charges on equal instalment of principal (EIP) loans.

2.20 Premises expenditure is forecast to be higher than budget due to the delayed handover date of the Tyne Pedestrian and Cycle Tunnels to TT2 once the refurbishment is complete. As set out in paragraph 2.61 of this report, this is not now anticipated to be until later in the financial year.

2.21 A net contribution from reserves of £0.230m is currently forecast to be required, which relates to the TPCT refurbishment works which were forecast to have already been completed at the time of setting the original budget.

Transport North East

2.22 Transport North East (TNE) supports the JTC, providing relevant information to support policy choices and to deliver policies at a regional level. Since its creation in 2018, TNE has been working at capacity to develop and lead on the delivery of a very broad and ambitious transport programme on behalf of the region. NECA and NTCA together form one of the largest areas in the country by population and geographical size. TNE acts as the strategic transport body that supports both Combined Authorities (via the JTC). The updated forecast of outturn as at the end of May 2022 is set out in the table below:

Table 6: Transport North East Core Budget – Forecast of outturn 2022/23

	2022/23 Original Budget	2022/23 Forecast	Variance	Expend. to 31 May 2022
	£m	£m	£m	£m
Employee costs	0.709	0.815	0.106	0.101
Transport Plan/Strategy Work	0.060	0.064	0.004	0.000
Research and Development	0.100	0.100	0.000	0.022
Travel and Miscellaneous	0.021	0.023	0.002	0.002
IT/Equipment/Accommodation	0.011	0.011	0.000	0.000
Contingency	0.049	0.049	0.000	0.002
Organisational Development	0.000	0.011	0.011	0.011
Total Expenditure	0.950	1.073	0.123	0.127
Local Transport Plan grant	(0.500)	(0.500)	0.000	(0.500)
Retained Transport Levy	(0.284)	(0.584)	0.000	0.047

	2022/23 Original Budget	2022/23 Forecast	Variance	Expend. to 31 May 2022
	£m	£m	£m	£m
External Funding for specific posts	(0.166)	(0.136)	0.030	(0.023)
LTA Capacity Revenue Grant	0.000	(0.178)	(0.178)	(0.178)
Total Income	(0.950)	(1.098)	(0.148)	(0.748)
Net Expenditure to be funded from Reserves	0.000	(0.025)	(0.025)	(0.621)
Contribution to/(from) reserves	0.000	0.025	0.025	0.621

2.23 With the exception of the staffing budget, the forecast is largely in line with the original budget for the year. The forecast outturn includes the impact of a number of changes to the staffing establishment approved by the Managing Director, Transport North East under delegations. These changes enable the team to meet increasing demands from central government, local authorities and stakeholders, make a more direct contribution to the promotion of active travel within our communities, improve our strategy to both internal and external customers and support the delivery of the Transport Plan objectives.

2.24 Additional costs have been accommodated in the current financial year through use of contingency funding, charging staff time against grants such as ATF and TCF where work directly relates to the delivery of the relevant programmes, and the receipt of Local Transport Authority Capacity grant of £0.178m. However, there is a potential cost pressure for 2023/24 and beyond due to the fact that some of these funding sources are one-off or due to end at the end of this financial year. In the event that further funding is not forthcoming, it will either be necessary to request increased contributions from constituent authorities, or draw from reserves for a temporary period while the scale and scope of the team is reviewed.

Table 7: Transport North East Grants and Projects – Forecast of Outturn 2022/23

	2022/23 Original Budget	2022/23 Forecast	Variance	Expend. to 31 May 2022
	£m	£m	£m	£m
Active Travel Planning	0.796	0.615	(0.181)	0.001
BSIP/ Enhanced Bus Partnership	0.280	0.745	0.465	0.049
Capability Fund	0.000	2.160	2.160	0.290
Freight Study	0.000	0.030	0.030	0.000
Levelling Up Fund Bid	0.000	0.050	0.050	0.000

	2022/23 Original Budget	2022/23 Forecast	Variance	Expend. to 31 May 2022
	£m	£m	£m	£m
Local Transport Fund (Bus and Light Rail)	0.000	9.924	9.924	3.650
Metro Futures Planning Studies	1.136	1.623	0.487	0.409
Rail Development	0.236	0.261	0.025	0.023
TCF Programme Management	0.621	0.241	(0.380)	0.031
Total Expenditure	3.069	15.639	12.580	4.453
ATF Revenue grant	(0.796)	(0.615)	0.181	(0.001)
Capability Fund grant	0.000	(2.160)	(2.160)	(0.290)
DfT Bus Capacity grant	(0.207)	(0.745)	(0.538)	(0.049)
Local Transport Fund	0.000	(9.924)	(9.924)	(3.650)
Metro Futures Planning Studies - funded by Nexus budget transfer	(1.136)	(1.523)	(0.387)	(0.409)
Metro Futures Planning Studies – LEP funded	0.000	(0.070)	(0.070)	0.000
Rail Administration Grant (via Nexus)	(0.236)	(0.236)	0.000	(0.023)
TCF Tranche 2	(0.621)	(0.241)	0.380	(0.031)
Total Grants and Contributions	(2.996)	(15.544)	(12.548)	(4.453)
Net Expenditure (to)/from Reserves	0.073	0.105	(0.068)	0.000

2.25 A number of new revenue funding streams have been awarded to TNE to administer since the original budget for the year was set. The DfT's Capability Fund provides active travel revenue funding for local authorities to enable the delivery of behaviour change programmes linked to the implementation of infrastructure. The package is a combination of payments which will be made to Local Authorities for delivery and TNE-led elements, such as increasing the amount of active travel data the team have access to which will inform the development of the North East Active Travel Strategy.

2.26 The JTC has been awarded £9.924m from the Local Transport Fund in respect of socially necessary bus services and light rail services. LTF is effective from 6 April 2022 until 4 October 2022 and is a successor grant scheme to the Bus Recovery Grant (BRG) paid to the JTC and the LRRRG paid to Nexus. Of the total, £7.300m has been allocated for light rail funding and therefore intended for the Tyne and

Wear Metro, with the remaining £2.624m available for bus services in the region, i.e. to be shared between Durham County Council, Northumberland County Council and Nexus.

2.27 Following the government’s announcement that the region had been awarded indicative funding of £163.5m for its Bus Service Improvement Plan (BSIP) and Enhanced Partnership (EP), work has been underway to meet the new timescales and requirements set out in the funding letter. These timescales are later than anticipated when the original budget for the year was set, and expenditure in the current financial year is therefore forecast to be higher. This includes the Enhanced Partnerships Team who are being put in place to aid effective management of the EP in this and future years. Forecast expenditure during the current financial year can be met through the remaining BSIP Capacity grant carried forward from 2021/22 and in future years through the programme element of the overall funding allocation to the region.

2.28 A regional bid is being prepared to the second round of the Levelling Up Fund. Costs of work to support this bid will be met from reserves which have been accrued due to underspend on the Retained Levy budget in 2021/22. There are also plans for a freight study which will explore opportunities for the region, which will be funded from the same source and is reflected in the forecast outturn.

Transport Capital Programme 2022/23

2.29 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 8: Transport Capital Programme Outturn 2022/23

	2022/23 Original Budget	2022/23 Revised Budget	Variance	Expend. to May 2022
	£m	£m	£m	£m
TCF Tranche 2	70.618	87.025	16.407	0.000
ATF Tranche 2	3.186	6.272	3.086	0.000
ATF Tranche 3	0.000	17.929	17.929	0.000
EV Charging	0.175	0.175	0.000	0.000
Ultra Low EV – Taxis	0.043	0.043	0.000	0.000
Metro Asset Renewal Plan	32.762	35.632	2.870	0.966
Metro Fleet Replacement	69.808	67.999	(1.809)	2.811
Nexus Other Capital Projects	8.345	4.151	(4.194)	0.260
Metro Flow	83.498	86.774	(3.276)	0.844

	2022/23 Original Budget	2022/23 Revised Budget	Variance	Expend. to May 2022
	£m	£m	£m	£m
Tyne Tunnels	0.000	0.410	0.410	0.022
Local Transport Plan	11.309	11.391	0.082	1.891
Total	279.744	317.801	38.057	6.794

Transforming Cities Fund Tranche 2

- 2.30 The North East has been awarded £208m grant from the Transforming Cities Fund (TCF), of which £10m was for Tranche 1 and £198m was for Tranche 2. Within the Tranche 2 schemes, £104m is for schemes where the decision making on 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 DfT.
- 2.30 Seven of the TCF Tranche 2 schemes are now in delivery, with more due to be brought forward for agreement over the summer.
- 2.31 Claims are submitted on a quarterly basis so expenditure to 31 May is £nil. The first claims for the year are due during July. Forecast expenditure is in line with the proposed revised budget for the year of £87.025m.

Active Travel Fund

- 2.32 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 £7.239m was capital. £0.262m of the capital funding was used in 2020/21 and £1.187m in 2021/22. Six of the eight schemes in the programme have now entered into a grant funding agreement, one schemes is now complete and the other five are in delivery.
- 2.33 In March 2022, the North East was awarded a further £17.9m for the delivery of nine schemes in our region from Tranche 3 of the fund. Of the nine schemes awarded funding in the North East, four were funded in Newcastle (£7.700m), one in North Tyneside (£3.500m), two in Northumberland (£3.462m) and two in Sunderland (£3.267m).

Electric Vehicle (EV) charging infrastructure

- 2.34 The four new charge points funded through the Local Growth Fund located in St Mary's car park, Sunderland, are now in operation and plans are being progressed for the installation of EV charging infrastructure at further sites, with the next planned at The Dunes, South Shields, Church Street, Gateshead and at West Denton Shopping Centre, Newcastle. Forecast expenditure for the year is £0.175m.

Ultra-Low Emission Vehicles – Taxi Project

2.35 Eight of the ten dedicated chargers for the taxi and private hire industry are now live and operational with the remaining two due to be delivered this financial year. An engagement event to encourage the switch to electric vehicles in the taxi trade took place at Gateshead International Stadium on 12 April. Forecast expenditure for the year is £0.043m.

Nexus Capital Programme

2.36 In the report to the JTC to approve the capital programme for 2022/23 to 2024/25 it was recognised that obtaining funding for the capital programme had been extremely challenging, with the submission to the 2021 Spending Review in relation to the Metro Asset Renewal Plan (MARP) not fully confirmed, with only the 2022/23 grant allocation (£30.2m) notified. At that time, MARP funding for 2023/24 and 2024/25 was subject to further approvals and likely to be linked to the region receiving a City Region Sustainable Transport Settlement (CRSTS), subject to appropriate governance being put in place.

2.37 This was far from a satisfactory position, given that the 2022/23 allocation was less than originally sought and the lack of CRSTS funding for the region meant that essential funding for infrastructure renewal beyond 2022/23 was not in place. Since 2019, the MARP had effectively been subject to annual funding settlements and as a result, planning the essential renewals programme has been very difficult, including preparation of the 2022/23 programme which had initially been assessed as being for one-year only. The timescales for developing the capital programme were more challenging than usual, and that had given rise to the development of a three-year programme that would likely require further refinement once projects progressed through the stage gate process, becoming better defined.

2.38 In particular, there has been significant concern over Nexus' ability to properly progress the 2022/23 programme with grant funding for 2023/24 and 2024/25 not in place. This is because a number of projects require contracts to be let that span more than one financial year. Examples include SCADA (Supervisory Control and Data Acquisition) system replacement, which is now life expired and likely to become unsupportable within a year or two and upgrades to Ticketing and Gating Systems and Infrastructure which protects fare revenue and is still reliant on the Microsoft XP operating system, which is out of support.

2.39 Consequently, Nexus, in conjunction with members from the JTC has been liaising with DfT in order to make the case for continuity of grant funding and ensure that the 2022/23 MARP can be delivered. Alongside this, Nexus has been working to critically evaluate the MARP and determine the most economically advantageous way of delivering the MARP.

2.40 On 10 May 2022, the Secretary of State for Transport wrote to the chair of the JTC confirming Government's commitment to the modernisation of the Metro and given the case Nexus has made together with Government commitments made during early 2020, awarded Nexus with £23.8m of funding across the years 2023/24 and 2024/25. This grant funding is in addition to £10.0m that DfT provided to Nexus in the latter part of 2021/22 which although fully applied in the prior year has released other resources for investment in the MARP. This means that Nexus now has

surety of capital grant for the next three years and has been critical in helping shape the changes to the MARP set out in this report.

2.41 As the region negotiates with Government to obtain a devolution deal, it is hoped that the still unresolved matter of Metro Rail Grant for the MARP can be progressed to a satisfactory outcome.

2.42 Nexus' original capital programme for 2022/23, provided for gross expenditure of £194.413m. By comparison, the revised 2022/23 programme requires a budget and funding provision of £194.555m. This represents a net increase of £0.142m as shown in the table below:

Table 9: Total Nexus Capital Programme

	2022/23 Original Budget	2022/23 Revised Budget	Variance	Expend. to P1 (May 2022)
	£m	£m	£m	£m
Metro Asset Renewal Programme	32.762	35.632		0.966
Fleet Replacement Programme	9.808	67.999		2.811
Other Capital Projects	8.345	4.151		0.260
Metro Flow	83.498	86.774		0.844
Total Programme	194.413	194.556		4.881

2.43 The reason for the net £0.142m increase in the 2022/23 capital programme is summarised below:

Table 10: Revisions to Nexus 2022/23 capital programme

	£m	£m
Metro Asset Renewal Programme		
- Slippage b/fwd from prior year	4.194	
- Projects scheduled in 2022/23 completed in the prior year	(0.042)	
- Savings against project budgets	(2.074)	
- Budget increases in respect of projects	3.194	
- Projects added to the 2022/23 programme	1.078	
- Projects deferred to the 2023/24 programme	(3.435)	2.870
Fleet Replacement Programme		
- Slippage b/fwd from prior year	12.626	
- Spend accelerated into the 2021/22 programme	(6.464)	
- Budget accelerated from the 2023/24 programme	4.904	
- Budget deferred until 2023/24	(12.876)	(1.810)

	£m	£m
Metro Flow		
- Slippage b/fwd from prior year	3.276	3.276
Other Capital Projects		
- Slippage b/fwd from prior year	0.989	
- Projects curtailed	(5.128)	
- Savings against project budgets	(0.070)	
- Budget increases in respect of projects	0.015	(4.194)
		0.142

Metro Asset Renewal Plan

2.44 Of the £2.870 increase in the MARP:

- Additional projects amounting to £1.1m including essential works at Benton Square, track circuit replacement and the digital retailing programme. Net budget increases required to complete existing projects totalling £1.1m. Budget increases of £3.2m, including Whitley Bay Station Canopy refurbishment and the Network Refresh project offset against £2.1m of project savings.
- Slippage of projects from 2021/22 into 2022/23 totalling £4.2m.
- The original 2022/23 programme included a value of £5.0m of over programming, required to ensure that the minimum spend targets are achieved. The revised 2022/23 programme now includes £2.9m of over programming.
- The 2022/23 MARP Programme will result in commitments in future years. The estimated contractual commitments and associated delivery costs together with budget for the most critical activities is £19.6m in 2023/24 and £14.2m in 2024/25. This allows for completion of SCADA renewal, XP upgrades to ticketing and gating infrastructure, Battery Loco refurbishment/renewal, Whitley Bay Station Canopy, Escalator and Lift refurbishment and continuation of OLE renewal, annual capital maintenance and cable degradation remedial works. These forward commitments amounting to £33.8m can be accommodated from additional grant awarded by DfT in late 2021/22 (£10.0m – referred to in the 2021/22 outturn report elsewhere on this agenda) and from the amount referenced in the SoS letter to the chair of the JTC dated 10 May 2022 (£23.8m).

2.45 However, the need for investment in the MARP in 2023/24 and 2024/25 is in excess of £33.8m which leaves a number of projects unfunded:

- There is no funding for Civils assets other than essential bridge assessments.
- Development of the replacement signalling system project will be further delayed without additional funding.
- Permanent way investment is limited to Capital Maintenance. Track refurbishment from South Gosforth to Airport and further S&C renewals are unfunded.

- No funding is available for Station investment beyond contract commitments.
- ICT Investment is limited to end-of-life infrastructure. No funding is available for back office applications including Asset Management Systems.

Fleet Replacement Programme (FRP)

2.47 Of the net £1.8m decrease in the Fleet Replacement Programme:

- Although there was slippage of £12.6m in 2021/22, the programme is keeping to time and budget at this stage.
- Whilst £12.9m has been deferred into future years £5.2m relates to contingency re-profiled. The remaining £7.7m relates to re-profiling of the Depot Construction Contract (DCC). However, importantly, this will not result in a delay to the delivery of the new train fleet.

Other Capital Projects (OCP)

2.48 Of the £4.2m reduction in Other Capital Projects:

- The removal of Callerton Car Park from the TCF funded schemes has resulted in a £2.2m decrease.
- The package of Digital Enhancements across the remainder of the car park estate has a budget reduction of £0.1m
- The Bus Contracts software project has slipped from 2021/22. Mainly funded from slippage of reserves from 2021/22 but an additional £0.015m budget increase is required, funded from reserves.
- The £2.191m decrease in the North Ferry Landing Relocation reflects the revised budget requirement to deliver the outstanding Ground Investigation (GI) works. Thereafter, actual delivery of the relocation will be dependent on securing additional grant funding. A £10.0m bid for Levelling Up capital grant in conjunction with North Tyneside Council, is being pursued in this respect, although this would be c£2.0m lower than the estimated cost of the project, adding further pressure on reserves unless another external funding source can be identified.

Metro Flow (MFL)

2.49 Of the net £3.3m increase in the Metro Flow Programme:

- Slippage of £3.3m in 2021/22 was a result of revisions to the contractor's delivery programme and deferred risk contingency. Importantly, the revised programme is keeping to time and budget at this stage.

2.50 Accordingly, the funding for the 2022/23 programme is also revised.

Table 11: Nexus Capital Programme Funding 2022/23

	2022/23 Original	2022/23 Revised	Variance

	Budget	Budget	
	£m	£m	£m
Metro Rail Grant (DfT)	30.200	30.200	0.000
Transforming Cities Fund (DfT)	80.395	86.435	6.040
New Fleet Grant (DfT)	64.800	64.800	0.000
LTP Grant	2.681	4.672	1.991
Highways Challenge Fund	2.245	2.345	0.100
North Ferry	3.003	1.058	(1.945)
LEP Grant	0.000	0.085	0.085
Fleet Earmarked Reserve	5.008	1.244	(3.764)
Other Earmarked Reserve	1.042	0.838	(0.204)
Over-programming	5.038	2.877	(2.161)
Total Funding	194.413	194.555	0.142

- 2.51 At the end of Period 1 £2.816m of capital grant has been claimed from the DfT. This includes MARP, FRP and MFL. The actual amount claimed in total was 100.0% of forecast and therefore within DfT tolerance levels of +/- 5%.

Tyne Tunnels

- 2.52 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.
- 2.53 The completion and certification of the inclined lifts is now the only major outstanding work required to complete the full refurbishment. Once this is completed, the Tunnels will be handed over from the Newcastle City Council project team, who are continuing to oversee their operation, to TT2 Ltd, who will then manage the operation of the Tunnels for the remainder of the Concession.
- 2.54 The completion of the inclined lifts has been delayed throughout 2020 with the Italian lift engineers (Maspero) citing Covid-19 travel restrictions as the principal reason for this. Engineers were last on site in January 2020 and have not been back to site since. However, the completion of the inclined glass lifts is a priority and therefore other options have been considered to reach a solution that allows the inclined lifts to be brought into operation as soon as possible.
- 2.55 New contractors were appointed in 2021 and work took place throughout the autumn and winter of 2021. The new specialist lift engineers have made good progress on 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, but due to supply chain issues there is a delay to the works until the parts can be supplied. 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.

Local Transport Plan

- 2.56 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.

2.57 Expenditure to the end of May 2022 is £1.891m, and the revised budget for the year is £11.391m, £0.082m higher than the original budget to take into account slippage from the 2021/22 programme.

Capital Programme Financing

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

Table 10: Capital Programme Financing 2022/23

	2022/23 Original Budget	2022/23 Revised Budget	Variance
	£m	£m	£m
Government Grants	269.728	315.309	43.420
Reserves	10.046	4.653	(5.807)
Total	279.774	317.801	38.057

2023/24 Budget Setting Process

2.59 In line with the Transport Levying Bodies regulations, Transport Levies for the North East area must be set by 15 February 2022. It is currently planned that these will be agreed by the JTC at its meeting on Tuesday 17 January 2023.

2.60 To comply with the NECA constitution (in its role as accountable body for the JTC) the budget setting process requires the following steps:

- Outline proposals will be developed following discussions with member and officer groups including Chief Executives and Heads of Transport during July, August and September. Finance Directors will be involved throughout the process.
- An initial report on transport budgets and the strategy for 2023/24 will be reported to the JTC on 13 September 2022. Outline budget proposals will highlight the overall level of capital and revenue budget and any service impacts upon which consultation would be required.
- Proposals will be developed and subject to consultation, with proposals being brought back to the JTC on 15 November 2022.
- Final proposals in relation to the JTC budget must be approved unanimously and will be considered at a meeting of the JTC on 17 January 2023.

3. Reasons for the Proposals

- 3.1 This report is for information, to enable the JTC to fulfil its role of monitoring transport budgets and the Transport Capital Programme on behalf of the two combined authorities.

4. Alternative Options Available

- 4.1 This report is for information.

5. Next Steps and Timetable for Implementation

- 5.1 The revenue budget and capital programme will continue to be the subject of regular update reports to the JTC during the financial year.

6. Potential Impact on Objectives

- 6.1 There are no impacts on objectives arising from this report which is for information.

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 Joint Transport Committee with a summary of the updated forecast of outturn against the budget and capital programme approved in January and February 2022. .

8. Legal Implications

- 8.1 There are no specific legal implications arising from this report which is for information.

9. Key Risks

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

10. Equality and Diversity

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

11. Crime and Disorder

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

12. Consultation/Engagement

- 12.1 The Revenue Budget for 2022/23 was subject to a period of consultation and engagement as part of the approval process. Detailed budget proposals are subject to consultation as appropriate, which is organised by the relevant delivery body.

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 Revenue Budget 2022/23 – February 2022 JTC ([Public Pack](#))[Agenda Document for North East Joint Transport Committee, 02/02/2022 17:00 \(northeastca.gov.uk\)](#)

Capital Programme 2022/23 – January 2022 JTC ([Public Pack](#))[Agenda Document for North East Joint Transport Committee, 18/01/2022 14:30 \(northeastca.gov.uk\)](#)

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:

18. Glossary

ATF – Active Travel Fund

BBF – Better Bus Fund

DfE – Department for Education

DfT – Department for Transport

DLUHC – Department for Levelling Up, Housing and Communities

ENCTS – English National Concessionary Travel Scheme

EV – Electric Vehicles

FRP – Fleet Replacement Programme

HVP – High Voltage Power

JTC – Joint Transport Committee

LACBSSG – Local Authority Coronavirus Bus Services Support Grant

LRRRG – Light Rail Revenue Restart Grant

MARP – Metro Asset Renewal Plan

MFL – Metro Flow

MMA – Metrocar Maintenance Agreement
MRP – Minimum Revenue Provision
NECA – North East Combined Authority
NEMOL – North East Metro Operations Limited
NTCA – North of Tyne Combined Authority
OCP – Other Capital Projects
TNE – Transport North East

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North East Joint Transport Committee

Date: 12 July 2022

Subject: Transforming Cities Fund Tranche 2 – Grant Funding Agreements

Report of: Managing Director, Transport North East.

Executive Summary.

The purpose of this report is to seek Joint Transport Committee approval to allocate £3,225,660 of funds from the Transforming Cities Fund (TCF) Devolved Pot to the Nexus Metro Park and Ride Enhancements scheme subject to the conclusion of successful appraisal in accordance with the North East Transport Assurance Framework.

Recommendations

The North East Joint Transport Committee is recommended to:

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

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 by March 2023, a key requirement of 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 A Business Case for the Nexus Metro Park and Ride Enhancements scheme has now come forward and is being considered in accordance with the region's Transport Assurance Framework, with appraisal conducted by TNE's retained consultants. The appraisal has shown that the scheme possess a strong strategic case, offers value for money and is capable of incurring all grant funding within the TCF programme timeframe.

2.2 JTC approval of the Metro Park and Ride Enhancements scheme will enable NECA to enter into a Grant Funding Agreement (GFA) with Nexus for scheme delivery and enable Nexus permission to draw down the funding allocation for the Metro Park and Ride Enhancements scheme from the TCF Devolved Pot, which is held by NECA on behalf of the JTC. In total, the amount of TCF grant funding associated with the Metro Park and Ride Enhancements scheme is: £3,225,660.

3. Reasons for the Proposals

3.1 The Metro Park and Ride Enhancements scheme has been proposed for JTC approval following the submission of the scheme Business Case, approval will enable the scheme to commence delivery. Delivery of the Metro Park and Ride Enhancements scheme 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.

3.2 *Table 1*, below, provides a brief overview of the Local Authority areas, outputs and benefits that will be derived from the investment that the Metro Park and Ride Enhancements scheme will deliver:

Table 1: Overview of Metro Park and Ride Enhancements Investment

Site	Local Authority	Outputs	Type of benefit
Bank Foot	Newcastle	Enhanced CCTV coverage, More efficient lighting, signage, cashless parking options with links to the Tyne & Wear Urban Traffic Management Centre, Automatic Number Plate Recognition Cameras	Improved perception of safety and security with links to real time car park occupancy data, and cashless ticket machines resulting in improved customer experience.
Callerton	Newcastle		
Regent Centre	Newcastle		
Northumberland Park	North Tyneside		
Four Lane Ends	North Tyneside		
Stadium of Light	Sunderland		

3.3 Approval of the Metro Park and Ride Enhancements scheme will ensure that contract letting, and the construction programme associated with the scheme can commence in good time, enabling the scheme to deliver within the TCF timescale. This will in turn ensure the region also defrays TCF grant within the required TCF programme timeframe, 31st March 2023.

4. Alternative Options Available

4.1 As part of the Business Case development 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 demonstrates why the chosen solution provides the best option 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 Metro Park and Ride Enhancements scheme and releasing the associated £3,225,660 of funds from the TCF Devolved Pot to enable the scheme to commence and deliver within TCF programme timescales.
- 4.4 Option 2 - The North East Joint Transport Committee do not accept the recommendations set out in this report, in which case the Metro Park and Ride Enhancements scheme will not be able to deliver in line with the TCF programme timescale and the benefits detailed within the Business Case will not be realised. Consequently the North East Transforming Cities Fund programme may underspend.
- 4.5 Option 1, is the recommended option.

5. Next Steps and Timetable for Implementation

- 5.1 A Grant Funding Agreement will be prepared by officers this will be subsequently agreed with Nexus as scheme promoter and signed, after which delivery and construction will commence. TNE will require that Nexus provide quarterly monitoring update reports on the Metro Park and Ride Enhancements scheme that will detail progress, expenditure, and risks.

6. Potential Impact on Objectives

- 6.1 The Metro Park and Ride Enhancement scheme will contribute positively to the high-level strategic objectives in both the regional Strategic Economic Plan and the North East Transport Plan. (FBC Strategic Objectives TBC)

7. Financial and Other Resources Implications

- 7.1 In total, the TCF allocation covered by this report amounts to £3,225,660. 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: £76,895,279
- Funds Committed as a result of the report: £3,225,660
- Remaining Devolved Pot: £23,676,593
- Total TCF Ask: £113,878,663
- Overprogramming: £10,081,131

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

8. Legal Implications

- 8.1 A Grant Funding Agreement is required in order to enable Nexus as scheme promoter permission to commence drawing down the funding allocation associated with the Metro Park and Ride Enhancements 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 Nexus as 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 Schemes with the TCF programme to be delayed or overspent. The funding mechanism included within the Grant Funding Agreement ensures that risks to the Committee are appropriately mitigated, transferred, and borne by scheme promoters.

10. Equality and Diversity

- 10.1 The scheme has been designed to modern standards and is compliant with appropriate legislation, ensuring that any equality and diversity implications are minimised.

11. Crime and Disorder

- 11.1 The scheme has been designed to modern standards, appropriate consultation with statutory consultees has taken place throughout the course of scheme design, ensuring that any crime and disorder implications will be minimised. The Metro Park and Ride Enhancements scheme generates a specific positive impact on safety and the perception of safety on public transport, thereby encouraging usage.

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 promoter has managed all consultation requirements pertaining to the scheme.

13. Other Impact of the Proposals

- 13.1 The Business Case outlines in detail the transport benefits derived from each specific intervention covered by the scheme, however, in addition the approval of this scheme is likely to generate wider economic benefit.

14. Appendices

- 14.1 Not Applicable.

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
- 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

North East Joint Transport Committee

Date: 12 July 2022

Subject: Transport Plan Progress Report

Report of: Managing Director, Transport North East

Executive Summary

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

Following the award of £163.5m indicative funding for the region's Bus Service Improvement Plan, work is underway to meet the new timescales and requirements set out in the funding letter.

Nexus and local authorities have set out plans to mitigate the impact of the bus service cuts announced by Go North East for Gateshead, South Tyneside and Sunderland.

A decarbonisation-led Levelling Up fund bid was submitted on 6th July, focusing on the introduction of more electric buses and more EV charging points.

Transport for the North have outlined proposals for developing the next Strategic Transport Plan. The new plan will be shorter and more focused and is to be published in January 2024.

The final two chargers to be installed under the Go Ultra Low taxi project in Newcastle and North Tyneside expected to go live this summer. Further engagement is planned with the trade thereafter to encourage them to make the switch to electric vehicles.

Eight of the Transforming Cities Fund (TCF) Tranche 2 schemes are now in or soon to be in delivery.

A multi-modal freight study for the region is to be carried out which will report its findings by the end of 2022.

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 New Metro fleet The Metro fleet manufacturer is on target to deliver the first new Metro train to its Gosforth depot before the end of 2022. This will then undergo extensive testing on the Metro network prior to entering customer service in 2023, beginning a rolling programme which will see a total of 46 new trains introduced up to 2025. The new trains will be 15 times more reliable than the current fleet, use at least 30% less high-voltage power and transform the journey experience for Metro customers. Construction work to build and prepare a £70 million new energy-efficient depot in Gosforth is on target for it to house the new fleet. A fully immersive cab simulator on which Metro drivers will train is now installed at the Nexus Learning Centre in South Shields.

The image below shows the first train manufactured at Stadler's facility in Switzerland on 15 June, ahead of full internal fit-out.



- 2.2 Bus partnership development The draft Enhanced Partnership (EP) Plan and Scheme documents were submitted to the Department for Transport (DfT) on the 30th June 2022. We are now awaiting feedback and agreement from DfT before finalising the documents and receiving confirmation of funding.
- 2.3 Bus service cuts Go North East (GNE) announced that it planned to make changes to services it operates in Gateshead, South Tyneside and Sunderland from the 24th July 2022. These changes are due to falling demand since the pandemic and the approaching end of Government support for operators in October. Following the outcome of a public engagement exercise and discussions with local authorities, Nexus have set out a £4.3m rescue package to mitigate the worst effects of the cuts.
- 2.4 Levelling up Fund A regional Decarbonisation-led transport bid is expected to be submitted by the end of July following consultation with regional stakeholders and members. The bid comprises the electrification of circa 52 buses operating on some of the most congested routes, together with a package of electric vehicle charging at park and ride sites to intercept traffic, and at key destinations. We expect to hear the outcome of this bid in Autumn 2022 and if successful improvements will be in place by Spring 2025.

3. Connectivity beyond our boundaries

- 3.1 Rail update The region was heavily affected by the rail strikes in June, with LNER services restricted to two trains per hour in each direction between London and Edinburgh and Transpennine trains only running a limited service between York and Manchester. There were no Northern Rail services operated.

In term of the impact on traffic, the rail strikes had a negligible impact on weekday road traffic when compared with the previous fortnight. However traffic levels were almost 6% higher on Saturday than the previous two Saturdays.

This could indicate that a significant proportion of rail commuters are able to work from home and thus avoid travelling altogether, whereas those undertaking recreational journeys at the weekend switched to driving.

- 3.2 Transport for the North (TfN) update TfN have outlined proposals for the next version of their Strategic Transport Plan (STP2), due to be published in January 2024. Taking into account feedback from partners and local authority colleagues, it is intended that STP2 will be a much shorter and more focused document, concentrating on schemes that can be delivered in the short to medium-term, as well as drawing on the findings of TfN's research into Transport-Related Social Exclusion across the north.
- 3.3 Road Improvement Strategy (RIS3) schemes Transport for the North are compiling a programme of Strategic Road Network interventions across the North, which it is planned to submit to National Highways (NH) at the end of this year, seeking inclusion in NH's RIS pipeline of schemes for the 2025-30 RIS3 investment programme. We are working with TfN to ensure our key highway priorities,

including Moor Farm and Seaton Burn, are listed in the programme.

- 3.4 A1 Morpeth to Ellingham dualling scheme The Secretary of State for Transport has stated that there will be a delay in making a decision on this upgrade scheme. A decision is now due on or before 5th December 2022.

4. Making the right travel choice

- 4.1 Go Ultra Low taxi project Eight of the ten dedicated chargers for the taxi and private hire industry (funded by the Office of Zero Emission Vehicles) are now live and it is expected that the final two chargers in Newcastle and North Tyneside will go live in the Summer with further engagement planned with the trade thereafter to encourage the switch to electrification.

- 4.2 Transforming Cities Fund Eight of the Transforming Cities Fund (TCF) Tranche 2 schemes are now in or soon to be in delivery, which is an uplift of one scheme since June. A separate agenda item will request JTC approval for a further scheme to enter into its delivery phase.

- 4.3 Freight Study A multi-modal freight study is to be carried out which will report back before the end of 2022. The study will examine how we can help to enable more efficient and sustainable freight transport and promote greater use of rail for the movement of goods.

6. Transport Usage Trends

- 6.1 Across the region public transport usage remains below pre-pandemic levels, with bus passenger numbers at 78% and Metro passengers at 86% of their pre-pandemic baselines. Traffic levels vary but are around the same levels as before the pandemic. Based on a selection of cycling counters in the region, April 2022 showed a decrease in the number of people cycling from the equivalent period in the previous year.

7. Reasons for the Proposals

- 7.1 This report is for information purposes.

8. Alternative Options Available

- 8.1 Not applicable to this report.

9. Next Steps and Timetable for Implementation

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

10. Potential Impact on Objectives

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

11. Financial and Other Resources Implications

- 11.1 The report provides an update and overview of progress against the seven Delivery Plan categories in implementing the objectives of the North East Transport Plan and achieving the vision of 'moving to a green, healthy, dynamic and thriving north-east.'
- 11.2 The North East Transport Plan includes proposed / required investment totalling £7billion to achieve the aims and ambitions of the JTC, the majority of which is dependent on future funding decisions by central government. The financial and other resource implications aligned to the plan were agreed as part of the Transport Budget and Levies 2021/22 report to the JTC on 19 January 2021 and in subsequent reports to augment and amend the budget as appropriate.

12. Legal Implications

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

13. Key Risks

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

14. Equality and Diversity

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

15. Crime and Disorder

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

16. Consultation/Engagement

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

17. Other Impact of the Proposals

17.1 No specific impacts.

18. Appendices

18.1 1 - Progress on Key Performance Indicators.

19. Background Papers

19.1 None.

20. Contact Officers

20.1 Tobyn Hughes, Managing Director, Transport North East

Tobyn.hughes@nexus.org.uk

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>
<u>Sustainable Travel</u> 33% of journeys made by public transport, walking and cycling. Data Source: DfT National Travel Survey 2019, published August 2020.	Increase	Data in the National Travel Survey for 2020 shows that 37% of journeys are made by public transport, walking and cycling, which is an increase on the previous year. Other data sources have Metro and bus use remaining below pre-

		covid levels even after restrictions have been lifted in 2021. For the 7 days commencing 5 th June Metro was at 86% of typical journey numbers, and for the 7 days commencing 4 th June bus was at 78%.
<p><u>Public transport accessibility</u></p> <p>45% People within 25 minutes of key employment, education and retail sites by public transport.</p> <p>Data source: Commissioned analysis August 2020</p>	No Change	Data is not yet available to update, however, there have been no major changes to infrastructure.
<p><u>Climate action</u></p> <p>CO2 emissions per capita: 1.7 tonnes CO2 emitted per person annually using transport.</p> <p>Data source: UK local authority and regional CO2 emissions statistics: 2019, Department for Business, Energy & Industrial Strategy, published June 2021</p>	No Change	Figures for 2019 have been released and show no change in the amount of transport related CO2 emissions.
<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</p>	Increase	<p>0.8% of licenced vehicles in the region are classed as ultra-low emission (Q3 2021).</p> <p>The number of ULEVs registered in the North</p>

<p>as ultra-low emission (end of 2019)</p> <p>Data source: Department for Transport vehicle licensing statistics</p>		<p>East increased to 8,923 at the end of Q3 2021.</p>
<p><u>Air quality</u></p> <p>For 2019, the highest, median, hourly nitrogen dioxide reading was 26.9ug/m3 occurring in the morning traffic peak.</p> <p>Data source: Department for Environment Food & Rural Affairs Automatic Urban and Rural Network (AURN)</p>	<p>Decrease</p>	<p>For 2021, the highest, median, hourly nitrogen dioxide reading was 25.5ug/m3 occurring in the morning traffic peak. This is an increase on 2020, however 2020 was expected to be unusually low. 25.5ug/m3 is lower than the baseline in 2019 – traffic levels began the year lower than pre-covid, however for much of the year they were at or above their equivalent pre-covid level.</p>
<p><u>Network performance</u></p> <p>In terms of efficiency, in 2019 our regional network scored 71.8%</p> <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>Decrease</p>	<p>In 2020 the estimated vehicle miles per head were 4,064. We can expect that 2020 will be unusually low due to travel restrictions in place as a result of the</p>

<p>Data source: Department for Transport National Travel survey, published August 2020</p>		<p>COVID-19 pandemic.</p>
<p><u>Road safety: numbers killed and seriously injured</u></p> <p>Numbers killed and seriously injured (KSI) three year rolling average (2016-17 to 2018-19) 778</p> <p>Data source: Traffic Accident Data Unit</p>	<p>Decrease</p>	<p>In the three-year rolling average from 2018 to 2021 there were 683 KSI.</p> <p>It is important to note that lower traffic volumes in 2020 and 2021 are likely to have contributed to the observed reduction in KSIs.</p>
<p><u>Road safety: number of slight injuries</u></p> <p>Number of slight injuries three year rolling 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>

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North East Joint Transport Committee

Date: 12th July 2022

Subject: North East 'Making the Right Travel Choice' Strategy- Agreement to Consult

Report of: Managing Director, Transport North East

Executive Summary

The strategy sets a target to encourage car users to switch one journey a week to public transport, walking or cycling and for people who don't have access to a car to continue to travel sustainably. This could result in around 200 million additional trips being made by sustainable transport every year, improving our environment and the health of local people.

The strategy makes the case that travel is good as it benefits our local economy and improves physical and mental wellbeing, but sustainable travel is better because it reduces carbon emissions and improves public health. Around 1 in 4 adults in the region are physically inactive, contributing to reduced life expectancy and this is something we can improve if we boost sustainable travel. This strategy highlights impactful transport schemes and campaigns that we can bring forward to encourage everyone in the region to increase their sustainable journeys.

This report seeks agreement from Joint Transport Committee to progress to consultation. The consultation will consist of two parts:

- A public engagement campaign which will aim to understand what people need us to do to help car users to switch one journey a week to public transport, walking or cycling and people who don't have access to a car to continue to travel sustainably; and
- Stakeholder consultation on the Strategy which will obtain feedback on the document.

It is recommended that public consultation commences on 20th July 2022 and runs until midnight 14th September 2022.

Recommendations

- i. The Joint Transport Committee is recommended to:
 - Grant approval to proceed with the public engagement campaign; and

- Agree to undertake consultation on the draft Making the Right Travel Choice Strategy with stakeholders.

1. Background Information

- 1.1 The North East Transport Plan (NETP), published March 2021, sets out the North East's transport ambitions up to 2035. The lead policy in the NETP is centred around helping people and businesses make the best transport choice based on their journey and available travel options.
- 1.2 The 2018/19 National Travel Survey which is being used as the baseline data for the draft strategy found that 67% of all trips in the North East were less than 5 miles whilst 20% were under 1 mile. For car journeys specifically, it is estimated that there were just over 90 million car trips that were under 1 mile and almost 750 million car trips that were less than 5 miles. There is a clear opportunity for more journeys under 5 miles to be made by sustainable travel.

2. Key Points

- 2.1 The consultation draft of the Making the Right Travel Choice Strategy (attached in Appendix A), aims to set out ways in which we can encourage and enable car users in the North East to switch one journey a week to public transport, walking or cycling and people who don't have access to a car to continue to travel sustainably. Doing so would have a positive impact in achieving the regions' transport objectives, particularly 'Healthier North East' and 'Carbon Neutral North East'.
- 2.2 Due to our region's diverse urban and rural mix, it is acknowledged in the draft strategy that there will need to be different solutions and expectations for people and businesses. It is not the intention of this strategy to provide a detailed blueprint for improving the transport network. Instead, the role of this strategy is focused on encouraging behaviour change rather than installing physical infrastructure.
- 2.3 Research with residents and businesses was commissioned to inform the initial development and implementation of the strategy.
- 2.4 The strategy recognised that for some trips, people may need to travel by car or van because of the distance involved and the complexity of the journey. This is why Zero Emission Vehicles (ZEVs) will need to be a significant part of the 'greener journeys' mix, so that even journeys that do need to be made by car or van can help to achieve our North East Transport Plan objectives.
- 2.5 The ask
The strategy asks car users to switch one journey a week to public transport, walking or cycling and people who don't have access to a car to continue to travel sustainably. This small change will mean at least 200 million more trips will be made by sustainable forms of travel each year, benefitting our environment and public health.
- 2.5 If car users switched one journey a week to public transport, walking or cycling and people who don't have access to a car to continue to travel sustainably this would:

- Potentially save around 214,000 tonnes of CO2 emissions a year;
- Potentially reduce poor health caused by road traffic emissions. It is estimated that poor air quality is responsible for around 360 deaths each year in central Tyneside alone;
- Result in more people becoming active, improving healthy life expectancy (HLE);
- Potentially save petrol and diesel car drivers approximately £170-190 per year (based on June 2022 fuel prices).

2.6 Personas

The strategy uses a series of personas to help people make the right travel choice for their specific journey circumstances. It is anticipated that people and businesses will relate to these and consider using them as a guide.

2.7 Measures of success

Key Performance Indicators have also been included which link directly back to the main objectives of the NETP and will be used to monitor the overall progress of the Strategy.

2.8 The Strategy also includes a programme of interventions to be delivered within the next five years.

2.9 Consultation

Subject to JTC approval, consultation will begin on 20th July 2022 for a period of 8 weeks. The proposed approach to the consultation will be two-pronged:

1 – A public engagement campaign, which will aim to find out what people need us to do to help car users switched one journey a week to public transport, walking or cycling and people who don't have access to a car to continue to travel sustainably. Various engagement methods will be undertaken including face to face events and an online survey to encourage as many people as possible to respond;

2 – Stakeholder consultation on the draft strategy which will seek to obtain feedback on the document and associated proposals.

3. **Reasons for the Proposals**

3.1 The purpose of this report is request agreement from members to:

- Proceed with the public engagement campaign; and
- Undertake consultation on the draft Making the Right Travel Choice Strategy with stakeholders.

4. **Alternative Options Available**

4.1 Members may choose not to proceed with consultation on the North East Making the Right Travel Choice Strategy.

5. Next Steps and Timetable for Implementation

- 5.1 Next steps will involve progressing to the consultation period which, providing JTC approval is granted, will start 20th July 2022 and close 14th September 2022. Consultation and engagement feedback will be brought to a future JTC meeting for consideration. Subject to JTC's approval, the North East Making the Right Travel Choice strategy will be published November 2022.

6. Potential Impact on Objectives

- 6.1 The North East Making the Right Travel Choice Strategy has been specifically developed to set out how the region's five transport objectives can be achieved.

7. Financial and Other Resources Implications

- 7.1 All costs associated with the development of the Strategy including the consultation process are being met from Transport North East's in-year budget.

8. Legal Implications

- 8.1 At this stage, there are no foreseen legal implications from the approach we are taking in progressing to consultation with the strategy.

9. Key Risks

- 9.1 No key risks have been identified at this stage.

10. Equality and Diversity

- 10.1 The Making the Right Travel Choice Strategy is intended to positively address equality and diversity issues within the region by enhancing transport provision for all users.
- 10.2 Research commissioned as part of the development of this strategy specifically set out to speak to North East residents, being inclusive of a range of demographics and geographies to ensure that under-presented groups are reflected.

11. Crime and Disorder

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

12. Consultation/Engagement

- 12.1 All local authorities across the NECA and NTCA areas have been engaged in the development of the strategy to date. Through the proposal to consult wider on the Strategy, it will give stakeholders the opportunity to provide feedback.

13. Other Impact of the Proposals

- 13.1 No specific impacts.

14. Appendices

14.1 Appendix A- North East Making the Right Travel Choice Strategy- Consultation draft

15. Background Papers

15.1 None

16. Contact Officers

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

17. Sign off

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

18. Glossary

NECA- North East Combined Authority

NTCA- North of Tyne Combined Authority

TNE- Transport North East

NETP- North East Transport Plan

NE MTRTC- North East Making the Right Travel Choice Strategy

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Making The Right Travel Choice

Draft for consultation July 2022

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Making the right travel choice

On behalf of the North East Joint Transport Committee (NEJTC), I am delighted to present the Making the Right Travel Choice Strategy.

This strategy is a key commitment of the North East Transport Plan which was adopted in 2021, and outlines some of the actions needed to make it easier for people to travel sustainably alongside what we can do to encourage more people to use active travel and public transport where possible.

It is imperative we work together to tackle the climate emergency and act to improve public health through transport. Around 1 in 4 adults in the region are physically inactive, contributing to reduced life expectancy and this is something we can improve if we boost sustainable travel.

We want to make it easier for people to pollute less and be more physically active by increasing the use of greener transport. In this scenario we all win – green transport is good for everyone – it's often the cheapest way to get around.

This strategy highlights impactful transport schemes and campaigns that we can bring forward to encourage everyone in the region to increase their sustainable journeys. We're asking car users to switch one journey a week to public transport, walking or cycling and people who don't have access to a car to continue to travel sustainably.

Together we can remove 200 million unnecessary car journeys from our region's roads, replacing them with cleaner, greener travel. Small changes can add up to make a big difference and together we can achieve our environmental and health goals.

Of course, car use will continue to be the only suitable travel option in many cases but that certainly isn't the case for every journey and we want people to think carefully about their travel options. We are committed to making it easier for people to choose sustainable options and that is why we are asking local people for their ideas and suggestions. The result will be a multi-million pound package of measures to encourage greener journeys.

I look forward to seeing the suggestions from local people that will really make a difference to how we all travel in the future to achieve our green and health ambitions.



Cllr Martin Gannon, Chair, North East Joint Transport Committee

Executive summary

Background

Mobility is good: most trips stimulate the economy, get people to education, healthcare, retail, or social opportunities. **But sustainable mobility is far better.** Active travel (cycling, walking and wheeling) and catching public transport (Bus, Ferry, Metro and rail) – is the cheapest way to travel and has enormous health and environmental benefits for our region, such as helping to reduce carbon emissions and improve public health outcomes.

Making journeys of course leaves an impact on our environment and plays a big role in our health and wellbeing, so how we choose to travel is very important.

Target

The strategy sets a target to encourage car users to switch one journey a week to public transport, walking or cycling and for people who don't have access to a car to continue to travel sustainably.

This could result in around 200 million additional trips being made by sustainable transport every year, improving our environment and the health of local people.

Why

The pandemic gave us a glimpse of cleaner towns, cities and neighbourhoods and people walked and cycled more. However, as we continue to recover from the impact of the pandemic, road traffic volumes have bounced back to 2019 levels faster than other forms of travel.

Contributing to climate change, congestion and poor air quality, this over-reliance on non-sustainable forms of transport such as a petrol or diesel car, also contributes to external costs such as our local NHS services.

In the North East, currently **1 in 4 adults are physically inactive** and air pollution and congestion are negatively impacting public health and the local economy.

In central Tyneside alone air pollution is responsible for around 360 deaths each year and road congestion is estimated to cost every North East driver around £236 per year.

North East Transport Plan

'Making the right travel choice' is the lead policy of the 2021-2035 North East Transport Plan. If we each increase our green journeys by even a small amount, that will take us towards achieving our vision of "Moving to a green, healthy, dynamic and thriving North East" and our five regional transport objectives.

Outlined in this document are some of the actions needed to make it easier for people to travel sustainably. We need to look at breaking down barriers to greener journeys – whether they're real or perceived.

No one-size fits all approach

The reasons why people travel the way they do are complex and depend on a number of circumstances, which can change per journey.

This strategy recognises that due to our region's diverse urban and rural mix, there will need to be different solutions and expectations to successfully encourage shifts away from private cars to more sustainable transport types.

There isn't a 'one fits all' approach and we recognise that the car or van may be the only option for certain journeys and personal circumstances.

Research

To help us understand our residents and employers thoughts about sustainable travel, and to inform the development of this strategy, we commissioned a programme of market research. The research project included feedback from people from lower income groups, as well as residents with disabilities and or health conditions that limit their mobility. A cross-section of North East employers of different sizes and locations were also interviewed.

Personas

Throughout this strategy, we have used data to create examples of people's personal and journey circumstances which people can relate to and consider using as a guide for how car users can consider switching one journey a week to public transport, walking or cycling and people who don't have access to a car to can continue to travel sustainably or do so more often than they do now.

Delivery

We have developed an initial pipeline of schemes to be taken forward which are subject to funding. These include incentivising sustainable trips using an app-based rewards system, working with doctors to "prescribe" healthy travel, and engaging children and parents through schools. Our schemes are ambitious, and we estimate would cost £29m in revenue funding over a five year period.

Consultation

As part of the consultation for this strategy, we are asking people across the region between July and September 2022 to contribute their own ideas for actions that would realistically help them to travel actively or use public transport more regularly.

1. Introduction

Introduction

What is this strategy?

Mobility is good: most trips stimulate the economy, get people to education, healthcare, retail, or social opportunities. But sustainable mobility is far better. Active travel is the cheapest way to get around, and it helps reduce carbon emissions and improve public health along with many other related benefits.

The strategy sets a target to encourage car users to switch one journey a week to public transport, walking or cycling and for people who don't have access to a car to continue to travel sustainably.

According to the 2018/19 National Travel Survey, significant proportions of journeys made in the region were over relatively short distances.

There is a clear opportunity to shift a significant proportion of these journeys to instead be made by walking, cycling, and using public transport.

On average people in the region make 19 trips a week. If car users switch just one journey a week to public transport, walking or cycling and people who don't have access to a car to continue to travel sustainably, this could result in around 200 million additional trips being made by sustainable transport every year, improving our environment and the health of local people.

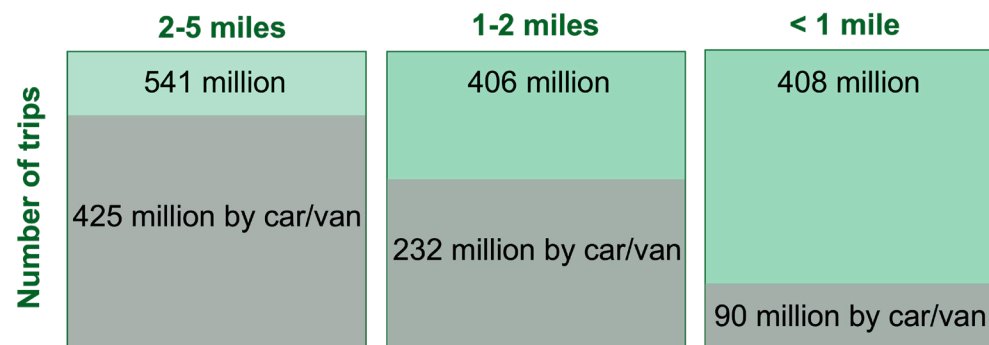
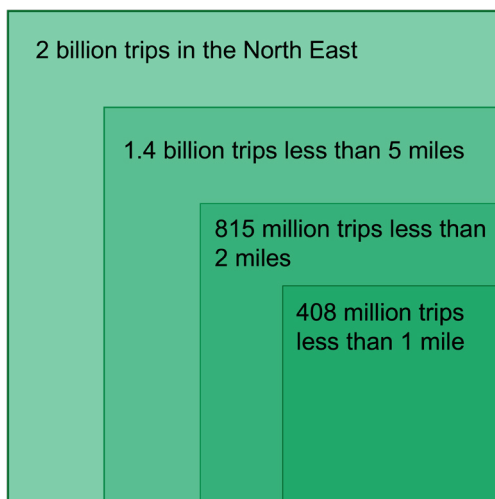
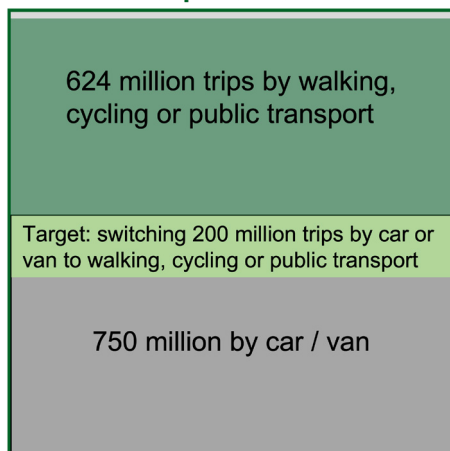
For this to happen we need to look at breaking down barriers to greener journeys – whether they're real or perceived barriers. This will help more people choose active travel and public transport for some of their weekly journeys when they can.

Crucially, we need to listen to the region's residents and businesses to find out what we need to introduce in order to help people to make the switch from the car and travel sustainably at least once per week.

Our sustainable transport network is changing and there has never been a better time to try it out. Our region was recently awarded an indicative £163.5m in funding for our bus network, a new £360m Metro fleet will enter operation in 2024 and new walking and cycling routes are being delivered thanks to the Active Travel Fund. Of course, there is still much to do, and improvements are being made every day, but major changes are happening now to improve our sustainable transport network.

The North East is a vibrant region, with large-scale employment opportunities, an excellent student offer, world heritage visitor sites and an evening economy that attracts tourists from across the UK and overseas.

1.4 billion trips less than 5 miles



Our three City Centres of Durham, Newcastle and Sunderland are surrounded by lively towns and villages set in some of the most beautiful and least populated countryside in the UK, with miles of unspoilt coastline and Northumberland National Park AONB. Our wide range of leisure, cultural, sporting and historical attractions includes UNESCO World Heritage sites Hadrian's Wall and Durham Cathedral and Castle. Our manufacturing base, five national catapult centres, three national innovation centres and growing tech and fintech industries attract significant inward investment, helping address the unequal life outcomes of our 2 million population.

In this strategy we set out what we are doing through our transport strategies and investment programmes; we identify where there are gaps; and we aim to make sure that everything we are doing influences the uptake of sustainable travel.

To do this we will need to win the hearts and minds of travellers across the North East – people who often lead busy and complex lives, and who may not currently consider that sustainable travel is a viable option for them.

The strategy includes a programme of interventions to be delivered within the next five years, worth a total of £29m. We hope that the proposed interventions set out will support North East residents and businesses to consider travelling more sustainably if they are funded.

Why now?

From March 2020, COVID-19 accelerated the demand for digital connectivity and in many cases this had an impact on physical mobility. Whilst digital connectivity provides many benefits including allowing people to work flexibly, we believe that physical activity is hugely important and is to be encouraged because it benefits the economy and physical and mental wellbeing.

We travel to school, to work, to shop, to care for others and to socialise with friends. For businesses, the ability to travel enables the opportunity to acquire, move and sell products and goods. Doing so benefits local economies of communities which make up our vibrant region.

A 2019 evidence review for the Department for Transport into transport, health, and wellbeing found that transport can also enable 'social connectivity' to people and can enhance both independence and opportunity. It is also the key to tackling inequality and deprivation by providing easy access to jobs and leisure.

Making journeys of course leaves an impact on our environment and plays a big role in our health and wellbeing, so **how** we choose to travel is very important.

The pandemic gave us a glimpse of cleaner towns, cities and neighbourhoods and people walked and cycled more. However, as we continue to recover from the impact of the pandemic, road traffic volumes have bounced back to 2019 levels faster than other forms of travel. This year (2022), traffic levels increased 20% above the equivalent period in 2019 – a worrying sign that we are in a car-dominated recovery.

In contrast to this, public transport use has still not recovered to what it was pre-pandemic so there is lots of work to do to welcome passengers back to sustainable forms of transport and as a result, there has been limited progress in reducing road-based carbon emissions in the region.

Contributing to climate change, congestion and poor air quality, this over-reliance on non-sustainable forms of transport such as a petrol or diesel car, also contributes to external costs such as our local NHS services.

It is estimated that physical inactivity costs the NHS in the North East (LA7 area) in excess of £19million per year.

If current petrol and diesel car drivers switched to making just one sustainable journey per week, there would be a **saving of around 214,000 tonnes of CO2 emissions a year.**

If everyone in the North East made one additional sustainable journey each week this would potentially reduce poor health caused by road traffic emissions and save petrol and diesel car drivers approximately £170-190 per year (based on June 2022 fuel prices).

Poor air quality affects people's health and is linked to serious conditions including heart disease, cancer and breathing problems. Older people, children and those with existing health conditions are more likely to be affected.

It is estimated that poor air quality is responsible for around 360 deaths each year in central Tyneside alone.

Supporting people to live more active and decarbonised lifestyles will also have positive effects on the region's public health outcomes such as improving life expectancy including Healthy Life Expectancy (HLE). If successful, there should be also a natural reduced demand on NHS services through a more active and healthy population, reducing overall operating costs and freeing up capacity in the service.

Around 70% adults aged 18+ in the North East classified as overweight or obese, the highest % region in England

Around 1 in 4 adults in the North East (25.6%) are physically inactive, the joint highest % region in England

Enabling people to make more journeys actively or using public transport will be the most significant way of achieving our transport objectives, set out on the following page.

For some trips, people may need to travel by car or van because of the distance involved and the complexity of the journey. This is why the greater take up of Zero Emission Vehicles (ZEVs) are important so even journeys that do need to be made by car or van can also help to achieve our objectives.



The **North East Transport Plan**, published in 2021, sets out our regional transport ambitions up to 2035. It brings to life our transport aspirations and includes a live programme of local transport schemes which will make a big difference to our environment, our health and

our economy. **Making the right travel choice** is the lead policy of our plan. This strategy builds on our policy further.

Little changes have a big impact, and if we each increase our green journeys by even a small amount, that will take us towards achieving

our vision of “**Moving to a green, healthy, dynamic and thriving North East**” and our regional transport objectives, which are set below.

The Vision

‘Moving to a green, healthy, dynamic and thriving North East’

The Objectives



Carbon neutral North East

We will take action to make travel in the North East net carbon zero. We will address our air quality challenges and aim to tackle the climate emergency.



Overcome inequality and grow our economy

We will return the region to pre COVID-19 levels of employment and Gross Domestic Product (GDP), then move towards the ambitions set out in the North East Local Enterprise Partnership’s [Strategic Economic Plan \(SEP\)](#).



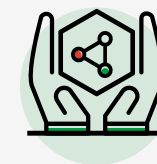
Healthier North East

We will encourage active travel (such as cycling, walking and wheeling) to help our region reach public health levels that are at least equal to other parts of the UK.



Appealing sustainable transport choices

We will introduce measures that make sustainable transport a more attractive, and an easy way to get around the North East.



Safe, secure network

We will improve transport safety and security, ensuring that people are confident that they feel safe and secure when travelling.

These five objectives are also the guiding objectives of this strategy. Proposals we have made in this strategy are aligned to and will support progress towards achieving these five objectives.

No one-size fits all approach

North East England is a diverse region encompassing large and densely populated urban areas, a surrounding geography of towns and semi-urban villages and a much larger hinterland of former mining villages and beyond them sparsely populated rural and coastal communities.

The reasons why people travel the way they do are complex and depend on a number of circumstances, which can change per journey.

It is also important to recognise that people's needs and experiences will vary depending on the type of area they live or work in. For instance, anyone living in or visiting isolated (particularly rural) areas of our region may find that the lack of sustainable alternatives makes them reliant on a car.

Due to our region's diverse urban and rural mix, there will need to be different solutions and expectations to successfully encourage and enable people to travel more sustainably.

There isn't a 'one fits all' approach and we recognise that the car or van may be the only option for certain journeys and personal circumstances.

To help us understand our residents and employers thoughts about sustainable travel, and to inform the development and implementation of this strategy, we commissioned a programme of market research. The research included feedback from people from lower income groups, as well as residents

with disabilities and or health conditions that limit their mobility. A variety of North East employers were also interviewed. The findings from this primary research are used throughout this strategy.



2. Personas

Personas

We understand that working out the best ‘green’ transport choice for a journey can be tricky at first, so we’ve developed a series of personas to help people make the right travel choice for their specific journey circumstances, which people can relate to and consider using as a guide.

We have taken the findings from our market research, along with other existing data and some reasonable assumptions about real journey circumstances and the transport barriers people face to create a set of data-driven personas.

This usage of data ensures that we focus on those who have told us they are open or willing to change the way they travel.

These personas will be used throughout the strategy to highlight issues and barriers to sustainable transport. They will also be a key tool to explore how car users can consider switching one journey a week to public transport, walking or cycling and people who don’t have access to a car to can continue to travel sustainably or do so more often than they do now.



Leigh

About: 29 year old, living in urban North East city. Customer support agent at regional call centre. Co-habits with partner of 5 years and 2 year old daughter. Enjoys spending time with family on weekends, and playing football with friends.

Typical journey: Uses his second-hand car a lot to collect shopping and to transport his young family.

Barriers to using sustainable transport:

- Having the necessary space to carry his shopping;
- Attitudes of drivers towards cyclists;
- Shared road use isn’t clear;
- Lack of segregated cycle tracks;
- Direct walking/cycling routes.



Sam

About: 50 year old, living in suburban area of North East with husband. A senior social worker, managing a small team of employees, predominately office based with some local visits. Enjoys a comfortable lifestyle, with disposable income to go on nice holidays, socialising and keeping fit for physical and mental health.

Typical journey: Frequently goes to events in the city after work (Sam lives on the outskirts of the city) for leisure/ sporting activities.

Barriers to using sustainable transport:

- Time constraints;
- Concerns about personal safety;
- Lack of direct walking and cycling routes;
- Has additional mobility needs that make using transport more difficult.



Sahira

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About: 33 year old single parent, living on outskirts of a major city in North East. Has two children aged 5 and 1. Works full time as a middle-manager at local bank, in hybrid home/ office arrangement. Passionate about securing promotion to provide greater financial security for children.

Typical journey: Frequently travels by car to do the school run and nursery drop offs and to take her children to appointments, these aren't always in the same place.

Barriers to using sustainable transport:

- Accessibility as a single traveller with two children, one of whom is in a pushchair;
- Perceived attitudes of some drivers towards cyclists;
- Lack of direct walking and cycling routes;
- Time constraints.



Rowan

About: 24 year old living in major city centre in North East. Became unemployed in 2020 and has struggled to find suitable employment since. Is in receipt of Universal Credit while trying to find a new job.

Typical journey: Travelling to job interviews to find employment. Rowan doesn't currently own a car as they are expensive.

Barriers to using sustainable transport:

- Cost of public transport;
- Potential to fall into transport poverty due to lack of economic stability.



Mohammed

About: 78 year old married retiree living in semi-rural area of North East. Enjoys meeting up with his friends and family, especially after being isolated in recent years due to Covid 19.

Typical journey: Always travelling to see family and friends, who live all over the North East. Tends to use the car as he thinks it is easier.

Barriers to using sustainable transport:

- Accessibility needs prevent him from walking or cycling great distances;
- Lack of bus reliability and average bus journey time.



Jo

About: 55 year old domestic cleaner and personal carer. Lives rurally with partner in North East. Travels to her elderly parents' house, whom she regularly cares for.

Typical journey: Jo uses a car to run a domestic cleaning business. Regularly travels to multiple clients' houses throughout day with cleaning equipment.

Barriers to using sustainable transport:

- Lack of time between clients;
- Parents with mobility issues;
- Finds bus fares and information confusing.



Alex

About: 20 year old living in suburban area of the North East. Manufacturing apprentice at a local plant. Lives with their parents and is insured to drive family car, therefore car shares with his parents.

Typical journey: Travelling to reach his apprenticeship each day and college once or twice a week.

Barriers to using sustainable transport:

- Shift patterns can make it hard to use public transport;
- Finds bus information confusing and struggles to access information;
- Cost of public transport;
- Their perceptions regarding safety and security on public transport.



Bobbie

About: 8 year old, in full time education, living at home with parents. All trips are made with a parent or guardian as Bobbie isn't travelling independently due to her age.

Typical journey: Travelling to and from primary school with her parents. Sometimes her mam walks her there, as her school is under a mile away from their home, but other times her parents drive her to school as they have some safety concerns about other road users and cyclists not watching out for pedestrians.

Barriers to using sustainable transport:

- Is largely restricted by parents' travel choices;
- Safety concerns around walking to school alongside cyclists and other road users.

3. How do people travel now?

How do people travel now?

Introduction

Transport underpins our daily lives. The way that people in the North East travel has changed and, for some, there is a reduced need to make journeys because of increased opportunities to work from home.

Consistently high levels of car use

Our region has high proportions of private car and van use.

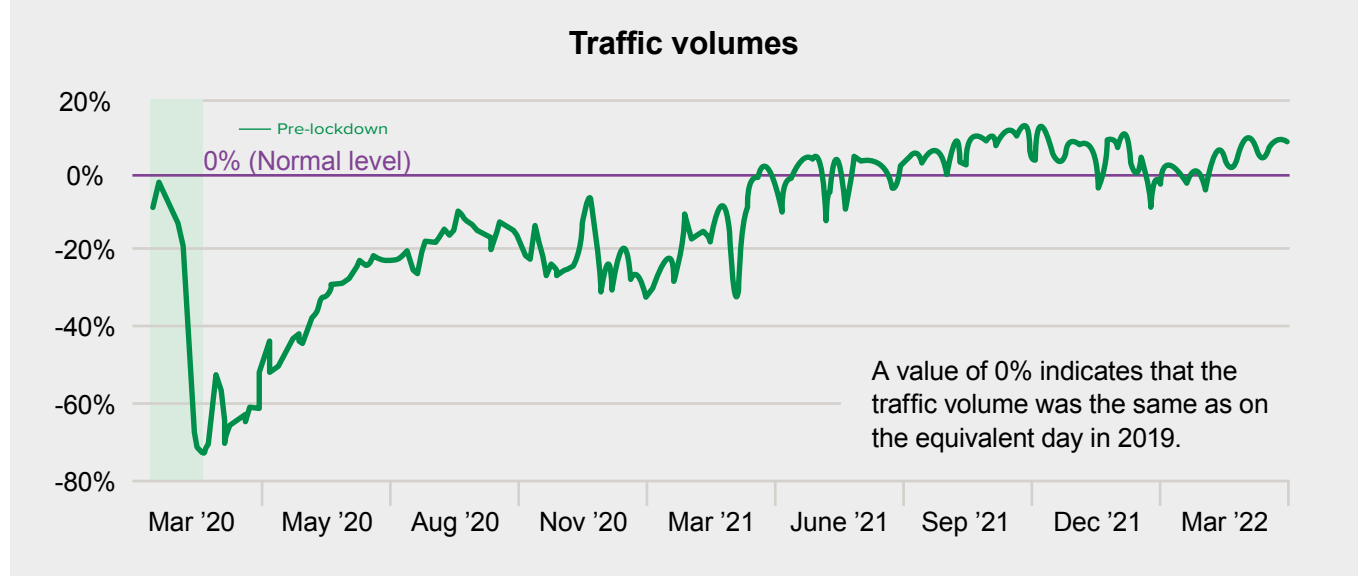
As with the rest of the UK, recent decades have seen rising levels of car use and ownership in the North East.

However, car ownership in the region is lower than all other English regions outside of London, highlighting the importance of the affordability of sustainable transport as a means of reducing inequality and providing access to opportunities.

Following the pandemic, traffic volumes bounced back to 2019 levels faster than other form of travel. In March 2022, traffic levels increased above the equivalent period in 2019, as can be seen in Figure 1.

As a result of this, there has been limited progress in reducing road based carbon emissions in the region.

Figure 1: Regional traffic level variations throughout the pandemic.



Many of the personas are dependent on their private car to get around because of perceived issues with the sustainable transport system.



Mohammed travels by car to visit family and friends because he is mindful of the added journey time by travelling on bus or Metro.



Jo uses her car to travel between client houses as she runs her own cleaning businesses and struggles for time in between jobs.

Alex is a part-time student and manufacturing apprentice who car shares with parents because they have to regularly go between work and college throughout the week.

Reduced public transport patronage

Public transport patronage has still not recovered to what it was pre-pandemic, (see Figure 2). At the end of March 2022 bus passenger numbers in the North East were 20% below 2019 levels and patronage on the Tyne and Wear Metro about 5% lower than in 2019.

Before the pandemic, bus patronage had been in relative decline but Metro passenger numbers had been relatively stable for several years.

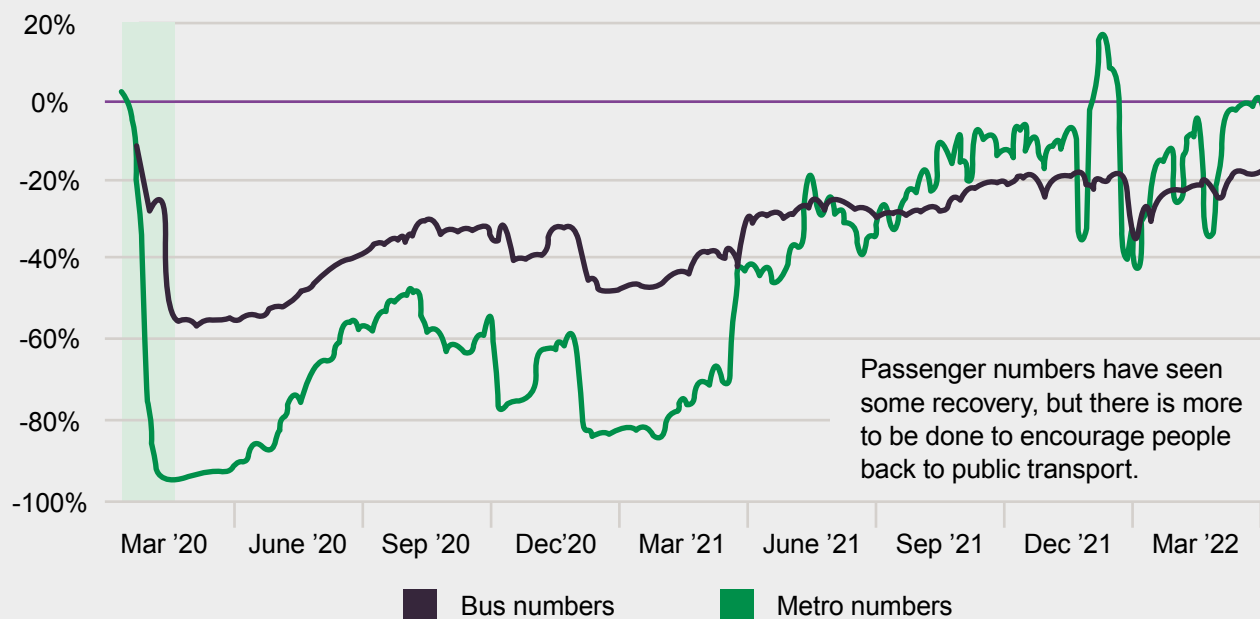
Recent rises in active travel

There is a need to address the North East's reliance on the car and to promote more sustainable modes of travel such as walking, wheeling, cycling and public transport.

During the pandemic, cycling levels increased dramatically with an estimated 24% uplift of daily volumes in Tyne and Wear in June 2021 from pre-COVID levels. This does not appear to have been sustained, although cycling numbers are still 6% up on the pre-pandemic 3-year average at the time of writing. This shows there is clearly potential for increased cycling to be unlocked.

Walking levels for leisure purpose remain higher than the national average, however for walking trips specially for a travel purpose, the region is under the national average.

Figure 2: Regional bus and Tyne & Wear Metro passenger numbers as a percentage of 2019 levels.



Some of the personas reflect these data findings.

Sam works full time and is office based, but not all of the appointments she and members of her team attend are city centre based. She also uses her car to get to and from after-work plans. Sam also employs a number of people who are reliant on public transport to get to work.

Recent growth in Zero Emission Vehicles (ZEV)

As of March 2021, there were 4,000 plug-in - including both Battery Electric (BEV) and Plug-In Hybrid (PHEV) - cars and vans licensed to private keepers in the North East. This is an increase from 2,800 vehicles in March 2020.

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Sahira now works from home for part of the week, meaning they are naturally making less journeys into the office.

Shared mobility

Shared mobility refers to transport services and resources which are shared by users, either at the same time or one after another. This includes public transport, micromobility (bike sharing or scooter sharing), automobile based modes (car sharing, rides on demand) and commuter based modes of ride sharing.

The region has seen the introduction of several shared electric car club vehicles.

Co-wheels, the biggest car club in the North East currently has over 2,400 members in the area.

E-scooters have been trialled in both Newcastle and Sunderland which have proven to be successful. For the first year of the trial in Newcastle over 500,000 miles were travelled on the e-scooters.

Changes in travel patterns

The pandemic has significantly altered travel patterns not only in the forms of transport people use, but also if and when people travel.

Figure 3 (on the following page) presents the percentage change in traffic volumes in Tyne and Wear from the equivalent period in 2019. It is clear that whilst congestion is worse during the morning peak than pre-2020, the evening period is less clearly defined as traffic levels are more sustained throughout the day. The higher traffic volumes in the morning correspond with the school run. Furthermore, there are higher volumes of traffic on mid-weekdays (Tuesday, Wednesday and Thursday than on Mondays and Fridays). This reflects greater flexibility in working arrangements for many employees, evident from Figure 4.

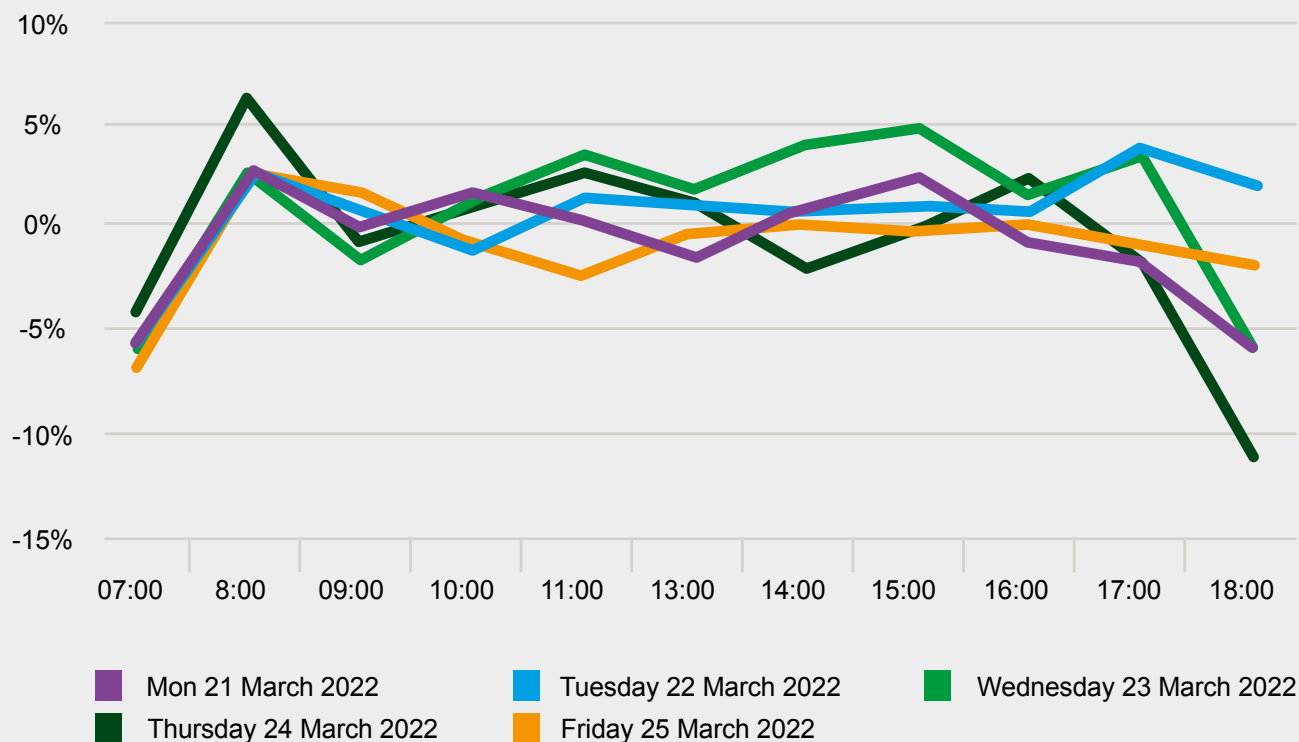
Many employees in the North East continue to work from home several days per week due to agile/hybrid working models and improved technology.

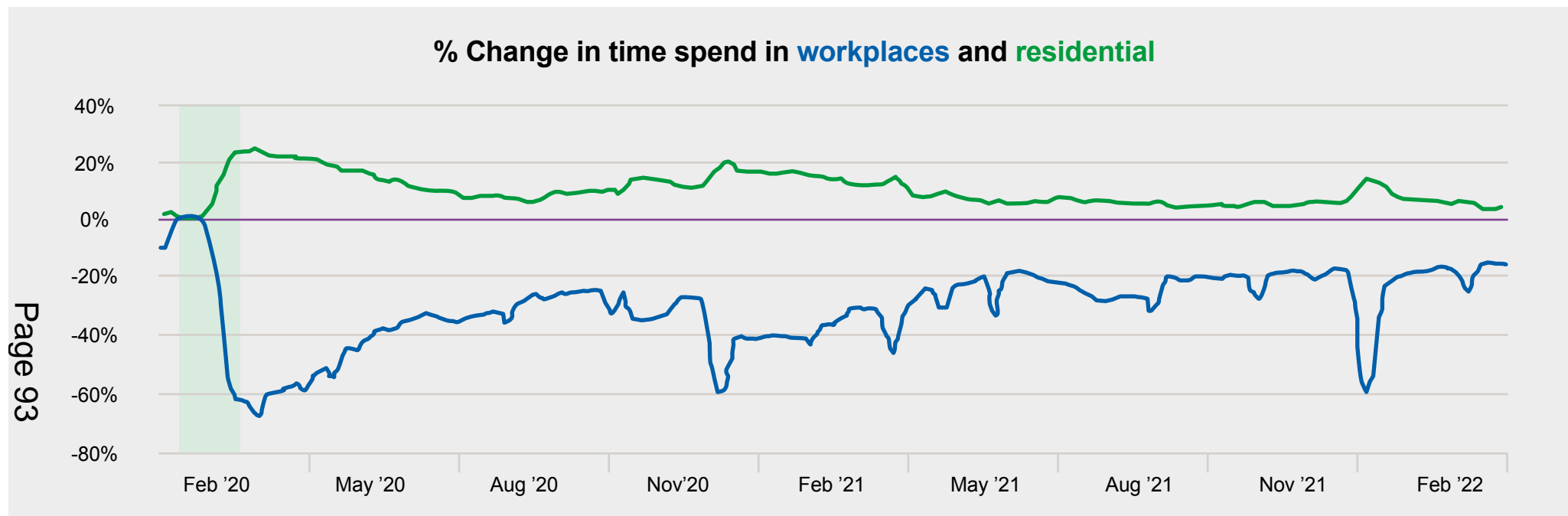
With reduced levels of commuting, public transport use remains lower throughout the week. However, patronage is generally higher at weekends now than it was before the pandemic. This indicates increased levels of leisure-based weekend journeys. Similarly, the number of people visiting Newcastle and Sunderland city centres in the evening are currently higher than pre-COVID levels. For example, Sunderland city centre saw a 63% increase for the period 13 February 2020 to 29 April 2022, compared to 1 February 2020.



Patterns of education were also disturbed during the pandemic, and many students like our persona Bobbie (as well as her parents) are now primarily travelling to school by car now that school has returned to the classroom.

Figure 3: Estimated change in traffic flow in Tyne and Wear from equivalent week in 2019.





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Figure 4: Percentage of time spent in workplaces and residential locations from Google Mobility data.



The pandemic also had an impact on how those who could previously afford to use the bus travel now. People like Rowan, who is not currently using the bus as much as he is unemployed and therefore does not travel to work.

Analysis – how do people travel now?

The overall transport trends which have been set out in this chapter, are having a detrimental impact on the region's ability to meet our vision and our objectives. This is because of the strong reliance on cars for travel and lower levels of public transport use. This car reliance is causing problems such as air pollution and congestion. Nevertheless, there are geographic and demographic disparities in transport choice across the region.

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We'll see in later chapters of this strategy how we can help people in similar circumstances to our persona Leigh to consider making greater use of local car clubs to reduce their carbon footprint.

Changes in travel patterns reflect the differing travel behaviours of people in the North East that are at least in part a result of the pandemic. It will be important to address the variety of journey purposes and different factors that influence travel choices within this strategy..

Chapter 4 outlines the challenges and implications of how people travel now in further detail.



4. What do people and businesses think?

What do people and businesses think?

Introduction

As we have set out, this strategy sets a target to encourage car users to switch one journey a week to public transport, walking or cycling and for people who don't have access to a car to continue to travel sustainably.



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“I don't walk or cycle that much as I've seen some car users be a bit aggressive towards cyclists. This puts me off trying to travel this way as I'm not exactly a confident cyclist. That's why I take the car when I leave the house to collect my shopping, whether that's for a few items or the weekly shop.”

Leigh

To identify suitable interventions, we have been listening to the region's residents and businesses to find out what we need to introduce to help people make one of their current car journeys by sustainable travel.

In early 2022 we sought views exploring motivations and barriers from both a resident and employer perspective. This chapter gives a high-level summary into our initial findings on what needs to change. It also highlights research which has been undertaken throughout the past three years.

What do our residents think?

Residents living rurally stated that the due to public transport being infrequent and a lack of direct buses, the private car was widely perceived as necessary, especially for longer journeys.

Nevertheless, those living in urban and suburban areas generally felt well-served in terms of public transport connections, particularly if close to a Metro station. The **reliability of services** was, however, a talking point and a key reason given for infrequent use.

“It's not very good, the bus service, around here at all. It is reliable, but say I wanted to go further afield, you're talking 2 or 3 buses to get to your destination. That's where the car would come in”

- Rural resident

During the Big Bus Conversation survey (2021) 'the bus not turning up on time' was the second highest rated barrier to bus usage. 37% of participants in a Nexus Insight Panel survey (2019) also believed that buses being unreliable was in the top three barriers to bus usage

Many North East residents have told us that rising fuel costs have led to the cost of travel becoming a more important consideration. One resident commented that due to the rising fuel costs and the perceived expense of using public transport has influenced how they spend their family leisure time.

“Cycling I might think about it or walking, and then totally miss out public transport and then go to car. I wouldn't even think, right I can't walk so I'll go on a bus. I will go straight to car. I don't like the uncertainty of it. When's the bus going to get there? Is it going to get there? What time is it coming? What time is the bus coming back? It's just easier to jump in your car.”

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“I've never really thought about using sustainable transport into the city after work. I have additional mobility needs and I would be concerned that the routes I would need to use would not be accessible. I tend to use the car instead.” **Sam**

51% of residents said waiting at a stop is their main dislike about traveling by bus, rising to 60% for those with a mobility difficulty.

Amongst infrequent and occasional non-users, a **lack of an informed knowledge** of how much the bus costs was apparent. This sometimes resulted in it being assumed that **fares would be expensive**.

There was reference in all focus groups to **rising fuel costs** and an acknowledgment that the cost of travel is increasingly becoming a consideration. Others talked about how rising fuel prices had made them think more carefully about whether a journey was necessary. Some were also planning journeys to a greater extent. There were a few specific examples of where rising fuel costs had encouraged a shift to travelling sustainably for some journeys.

There was widespread agreement from residents that **promotion** of our ambition where walking, cycling or using public transport is the best way to travel is immediately required in order to **raise awareness and encourage** people to think more about their travel choices. Information to tell people more about existing sustainable transport choices such as car clubs was also suggested.

“Honestly, I wouldn't actually have a clue how much it would cost us to get somewhere on the bus these days. I think if they want people to use buses more, then maybe they need to make a bigger thing and say how much cheaper it is rather than driving.”

- Resident who rejects to switching travel choice

“What I've started doing recently, like, since the cost of fuel has gone up is - I used to use the car every single journey to go and pick up the kids from school... ..it's literally a 10-minute walk... ..so I'm now starting to think, right, I need to walk instead of jumping in the car. I'm definitely thinking about it more, but that's just because of the increase in fuel costs.”

62% of infrequent users from the Big Bus Conversation survey said they would be more likely to use the bus if there were more direct and quicker journeys, as well as better waiting facilities at bus stops.

“You would have to tell them more about your car club. If it was a good thing, and more about how you can get accessibly to public transport, and the fact that it was cheaper than using the car.”

- Resident who has the potential to switch. Lives in village / countryside

“I think if they want change to happen, they’re going to have to advertise it. Otherwise, nobody’s going to be thinking about it, nobody’s going to know that it needs to happen.”

- Resident who rejects to switching travel choice

A small proportion of participants told us they were already walking or cycling to get around usually when doing the school run or to the local shops. They acknowledged that they were more likely to do it in spring and summer, and in ‘good weather’. Mental and physical health benefits and financial reasons were the main motivations cited by those adopting the ‘right travel behaviour’.

Some concerns were raised around the perceived safety of active travel, particularly around cycling as well as issues of perceived personal safety on public transport.

“I think a lot of it could be that it’s just not in the forefront of my mind. So if these were plastered about the place [the decision tree], then it might be like, ah, I should have a bit of a think about how I’m going to make that journey.”

- Resident who is open to switching. Lives in city / town



“If I was to go further afield, it’s how many buses you would need to get there that puts me off. It’s not that you can’t, it’s just the time that it’s going to take. You don’t want an hour and a half journey for something that would take 30 minutes by car. Plus, I don’t really trust them to turn up or get to where I’m going in time.”

Mohammed



“When mam takes me to school, sometimes we are late because of the traffic.” **Bobbie**



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“I find it difficult when people sit in the accessible area on public transport and they just don’t want to give up their seat. That’s why I mainly use the car when travelling with my elderly parents.”

Jo

“People need to be a bit more conscious. Instead of just jumping in the car, like I said, looking at alternatives. Like how many times do I use the car to nip to the shop that literally is just a two-minute walk and you just think to yourself, why have I done that, especially with the prices and everything now.”

- Resident who is open to switching.
Lives in village / countryside



“I sometimes worry about experiencing abuse on the bus or Metro, which puts me off using it more to get to work and college.”

Alex

“I think lockdown probably had a lot to do with it. You know, I think it was probably an excuse to spend more time outdoors during lockdown... ..so it was probably a mental health thing, to try and get out of the house more. And it just became a bit of a habit really.”

- Resident who has the potential to switch. Lives in village / countryside



“Some of my employees use public transport and have been late to work in the past. Better reliability of public transport would improve staff productivity and encourage them to travel to work on public transport regularly.” **Sam**

“I wouldn’t want to cycle on the road. For me, I wouldn’t want to run the risk of being hit by a car because you see it happening all the time. I feel like they are asking you to do those things, but maybe people don’t feel comfortable doing them for whatever reason.”

- Resident who rejects to switching travel choice due to perceptions of safety

In a recent survey, 17% of people said that the behaviour of other passengers was a barrier to bus travel.

68% of respondents have felt worried about their personal safety while on board Metro, 21% while waiting for a Metro and 11% when walking to/from stations and stops.

The feasibility and personal relevance of 'making the right travel choice' was questioned by those with mobility issues. The importance of convenience was such that the issue of sustainable travel was secondary.

"I can't actually get my car anywhere near my house. Because we have a communal car park for probably around 50 houses, which are all terraced houses. So even if I wanted to buy an electric car I couldn't, because I have no means of charging it"

- Resident who has the potential to switch. Lives in village / countryside

"I actually tend to only go out about once a week-that's when my friend will take me. I don't have to pay that bus fare, and I can actually get extra shopping with the money that I'm saving."

"Honestly, I wouldn't actually have a clue how much it would cost us to get somewhere on the bus these days. I think if they want people to use buses more, then maybe they need to make a bigger thing and say how much cheaper it is rather than driving"

- Resident who rejects to switching travel choice

"Yeah, I mean, if that was on my phone, I could access on my phone to find out if it was delayed. That would help because then I would just go away and sit down somewhere or go home and come back. But I live a fairly good walk away from the bus stop, so if I had to walk to the bus stop, which I could do, for me to wait at the bus stop and then the bus not come, I would be exhausted."

- Resident with mobility issues

The **perceived expense of public transport** was cited as a barrier, as was long, indirect journeys when compared with the private car. Positive cost comparison around using car vs public transport was also suggested as an effective way of possibly encouraging change.

There was strong interest from car owners in switching to an electric or hybrid vehicle, although cost and charging infrastructure were raised as barriers. Amongst some respondents, switching to an electric car was the only alternative transport option they would consider. Those in lower income groups were seen as being presently excluded from electric vehicle ownership.

“They should have an app to warn people if there’s offers coming up...that you could sign up to and get deals and offers.”

- Resident from a lower income group

Amongst participants who felt they were unlikely to change their travel behaviour, the perception that more ‘negative’ messaging around environmental impact of travel choices predominated. This stood in contrast to those more open to switching to a more sustainable way of travel, who felt that more ‘positive’ messages linked to personal benefits would be more motivational.

The need for positive messages around the price, safety and cleanliness of public transport, to raise awareness and tackle barriers were also perceived to be required.

“Could they project, say in 25 years time, what will happen if we keep going the same way, compared to if everybody made the change? I don’t know if it would work, but at least we’d be able to see the kind of impact that we’re going to have. Because I think people live for the moment.”

- Resident who rejects to switching travel choice

Page 101
“I like a car. I like being on my own. That sounds pretty sad. I would get an electric car if it was affordable. Yeah. And I’d be happy to do that. But it’s not affordable at all.”

- Resident who rejects to switching travel choice

“I think it’s all about word of mouth. If someone goes on it [public transport] and it’s a much better experience, and it’s a bit more frequent, then others might try it.”

- Resident who rejects to switching travel choice

“I would think motivation rather than making people feel bad for not doing it as much, definitely more upbeat.”

- Resident who has the potential to switch. Lives in village / countryside

“I think if I was guaranteed help from somebody or I could get on and off a bus easily, that would be the main thing.”

- Resident with mobility issues

“I think if they want change to happen, they’re going to have to advertise it. Otherwise, nobody’s going to be thinking about it, nobody’s going to know that it needs to happen as much.”

- Resident who rejects to switching travel choice

79% of people rated the ease of getting about their local area by car or van as good, but only 40% rated the provision of cycle lanes and paths as good. This shows the disparity between perceived facilities for car travel and that for active travel.

- Bluegrass 2021 Public Attitudes Survey

“Trying to get my rollator on and off the bus. I have to lift it up or wait for someone to come and help me.”

- Resident with mobility issues

Summary from North East business

The primary research with North East employers was structured to engage a variety of businesses in terms of size, sector and locations. Here is a summary of the main findings:

- Business size and the need for travel within the working day stand out as influencing current practices and outlook towards sustainable travel.
- Business location is also significant, with those in areas without good access to public transport feeling that reliance on car is inevitable.
- For many of the employers we spoke to as part of our research for this strategy, a switch to electric vehicles was seen as a first positive step in being more green, although the cost required to buy a vehicle was cited as a major barrier.
- Consistent with the residents' strand of work, improving public transport provision is perceived to be essential. To improve access, this needs to be supported by better value, simpler and multi-modal ticketing, especially to engage lower-wage earning groups.

“Education would be key to encouraging uptake. More high profile campaigning is important to raise the profile of the alternative options for travel - for staff and for employers alike.”

- Small business, North Tyneside

“You can't do this type of campaigning ad-hoc - it has to be regular and constant.”

- A North East Business park

“A single website for users to be able to investigate and map journeys via multiple modes is key. A single quality source of transport information is important. The current situation seems fragmented.”

- Micro business, Newcastle

“I appreciate not everyone can give up cars, so any support on looking at alternatives, for example car sharing or cycling, is helpful.”

- Micro business, Newcastle

“Yes definitely, get people to ‘try before you buy’, trialling new options to help get people to shift.”

- Large business, South Tyneside

“Greater use of electric vehicles for localised travel would be good.”

- Large business, Durham

“Cheaper fares and passes would be important incentives to help. The alternatives have to be cost effective.”

- Small business, North Tyneside

- The changing work patterns triggered by the pandemic present a potential opportunity, although indication that employees need encouragement to return to public transport and transport-sharing behaviours.
- Businesses also stated that the Cycle to Work schemes have been successful over time with many noting strong results and good uptake amongst their staff. In addition, North East employers were clear on the need for an improved offer and more joined up approach to cycling with other modes of transport so that users can seamlessly use different types of transport in one journey.
- An integrated communications and information campaign could be important to raise awareness and to begin the process of behaviour change.

“Car sharing used to popular and used regularly by staff but was discouraged during Covid and hasn't picked up again.”

- Large business South Tyneside

“It's good to encourage increased cycling in city centres like Newcastle through bike lanes, but the other transport options need to be joined up, so that bikes can be carried on the Metro and bus, for example.”

- Micro business, North Tyneside

“The [transport] network is poor, consistent and not joined up.”

- Small business, Newcastle

“Yes, we do it [public transport ‘taster’ tickets], but its only for a short term measure, and its for bus only. Metro access has been stopped. Network- wide taster tickets would be much better.”

- North East business park

“Business owners receive an incentive and tax benefits if their transport options switch to electric, but that incentive does not apply to individuals. The economics don't add up and so staff choose traditional cars.”

- Small business, Newcastle

“Post Covid, there's lots of changed working and travel behaviours. Business has embedded online and agile working, and increased use of technology - all of which contribute to greater thought around travel.”

- Large business, Gateshead

“The changing nature of working [as a result of the easing of COVID-19 restrictions] is dictating a shift. People want to travel again, feel safer, and face to face meetings are important to their clients. But this switch for staff has been back to traditional car use - not public transport.”

- Small business Newcastle

5. What are the challenges?

What are the challenges?

Introduction

In this chapter we have identified the following key challenges. We need to look at addressing these challenges and breaking down barriers to greener journeys – whether they're real or perceived. If we are successful, sustainable travel such as walking, cycling, and public transport will be a more attractive, convenient and easy alternative to the car.

These challenges are:

- Safety (actual and perceived)
- Accessibility
- Affordability (actual and perceived)
- Information and messaging
- Coordination and integration
- Journey times and reliability (actual and perceived)

Safety (actual and perceived)

Personal safety

The findings from the research set out in the previous chapter found that some people are concerned about potentially falling victim to crime or witnessing anti-social behaviour while using public transport, both at stations and on services. The same is true for people's perceptions of personal safety when cycling or walking in built up places and in rural locations.

We also know that some people have negative perceptions of safety and security impacts on public transport especially at night.

Passenger's most significant personal security concern (on Metro) was identified as being the risk of experiencing anti-social behaviour which negatively impacted people's perceptions of personal safety and overall satisfaction.

For active travel, poor street lighting, busy and inconsiderate road traffic, a lack of or inappropriate places for crossing roads were also safety issues which have been highlighted by residents.

Cleaning regimes

Although cleanliness on transport has always been important to passengers, since the pandemic this has become more of a priority and often acknowledged as a reason for not using transport.

Buses, Metros, trains and stations were already professionally cleaned daily but enhanced cleaning regimes and improved ventilation on public transport were introduced from March 2020.

This still remains a challenge and has led to more people choosing to travel by private car.

Road incidents

A clear challenge which was highlighted by those who either cycled or considered doing so, was poorly maintained cycle lanes, as well as having to share road space with cars, and a lack of cycle lanes in general. Safety was a specific barrier identified for cycling.

Figure 5: Aspects of safety as a barrier to cycling

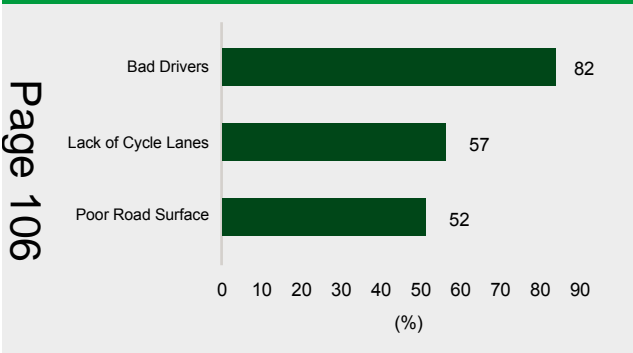
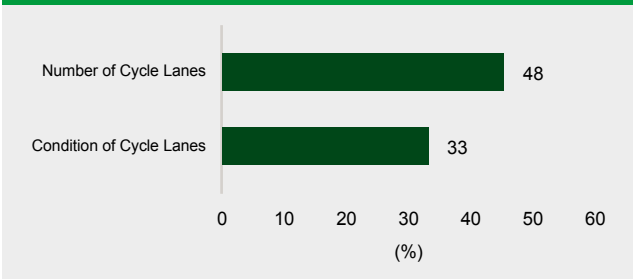


Figure 6: Reasons for dissatisfaction with cycle lanes



Accessibility

The North East's geography, both in terms of the economy and in patterns of settlement and development, provides challenges and opportunities around sustainable transport options.

Our mix of urban, suburban, and rural landscapes results in complex demands for travel and this is reflected in our varied transport challenges, from rural isolation in our remoter areas to poor air quality and congestion in our cities. For many people living in more remote rural communities, using a private car for travel is perceived as the only viable option.

It is important to recognise this variation and the way people's needs and experiences vary between the type of area they live in, for example urban or rural. People also experience particular barriers to mobility and access such as people with a disability or injury, elderly people and people with hidden disabilities and conditions.

Transport and socio-economic inequality are linked. Inequalities in the provision of transport services are strongly linked with where people live, and the associated differences in access to employment, healthcare, education, and local shops.

Transport can help to reduce inequalities by enabling people to access a range of services quickly and easily. Good transport links also play a role in reducing deprivation by enabling people to access job opportunities which in turn can improve quality of life and reduce inequality.



These are some of the challenges Bobbie and her parents face when deciding whether to walk to school or use the family car. Bobbie's mam prefers to drive the school run when it's raining, despite it being a reasonably short walk to Bobbie's school.



In the past Sahira has struggled to get both of her young children on board public transport, especially as her youngest is in a pushchair.

Public transport

The North East bus network reflects the nature of the area in which it operates, with infrequent services in remote rural areas and high frequencies in dense, urban areas. In rural and suburban areas there is often a lack of public transport between towns and rural communities with the focus being on links to urban areas.

Bus journeys can be long and indirect which makes them less accessible and poor supporting infrastructure such as a lack of bus shelters can also hinder usage.

People reporting experiences of low-quality waiting provision at stops and interchanges is a serious problem. Poor waiting facilities at bus stops acts as a deterrent to people who rarely or never use public transport, and as a barrier to people considering changing the way they travel.

Rail connectivity is of a high quality within the urban Tyne and Wear core, mainly thanks to the well-developed Metro system. However, connectivity remains a challenge to more remote rural areas and deprived areas in the urban periphery.

There are large areas of the North East that do not benefit from train services at all because there are no local routes or stations, or which are hampered by the limitations of existing services. This hinders wider opportunities for businesses and residents alike.

This does not just occur in rural areas of the region. For example, in Tyne and Wear there are significant communities that are unserved by rail, for example Washington and West Newcastle. This leads to over-reliance on the congested road network and economic isolation for people without a car.

Active travel

Walking and cycling accessibility is impacted in many cases by poor street lighting, and a lack of or inappropriate places for crossing roads.

There is often poor pedestrian and cycling access to major public transport stations and interchanges, and there needs to be improved integration to enhance accessibility to successfully encourage people to walk or cycle to stations and interchanges. Which reduces opportunities to employment and other key facilities.

Mobility issues

The research findings outlined in chapter 3 highlighted how people with mobility issues are heavily reliant on the car, which is partly due to accessibility issues with public transport. Problems have been reported by those who have accessibility issues whilst attempting to use the network including a lack of dropped kerbs, unsuitable crossing points and shared paths.

Our research found that non-essential journeys were a rarity amongst those with mobility issues due to these difficulties highlighted above.

In addition, passengers face challenges of inadequate facilities including bike storage facilities and no way-finding between different types of transport.

Sustainable links to employment sites

Professional services tend to be focused on the main urban centres and at out-of-town commercial developments, with advanced manufacturing located at business parks around the region.

Typically, higher volumes of Metro and local rail usage are closely correlated with areas of high employment density, particularly in Tyne and Wear.

However, some key sites go against this trend and are located away from city and town centres in locations with irregular bus services, poor and indirect walking and cycling routes. Instead, they are served by large car parking facilities, which promotes private car use as the most convenient travel option. This is a key challenge which we need to work with employers to see if this can be addressed.

Affordability (actual and perceived)

Pricing and affordability can be a barrier to sustainable transport use.

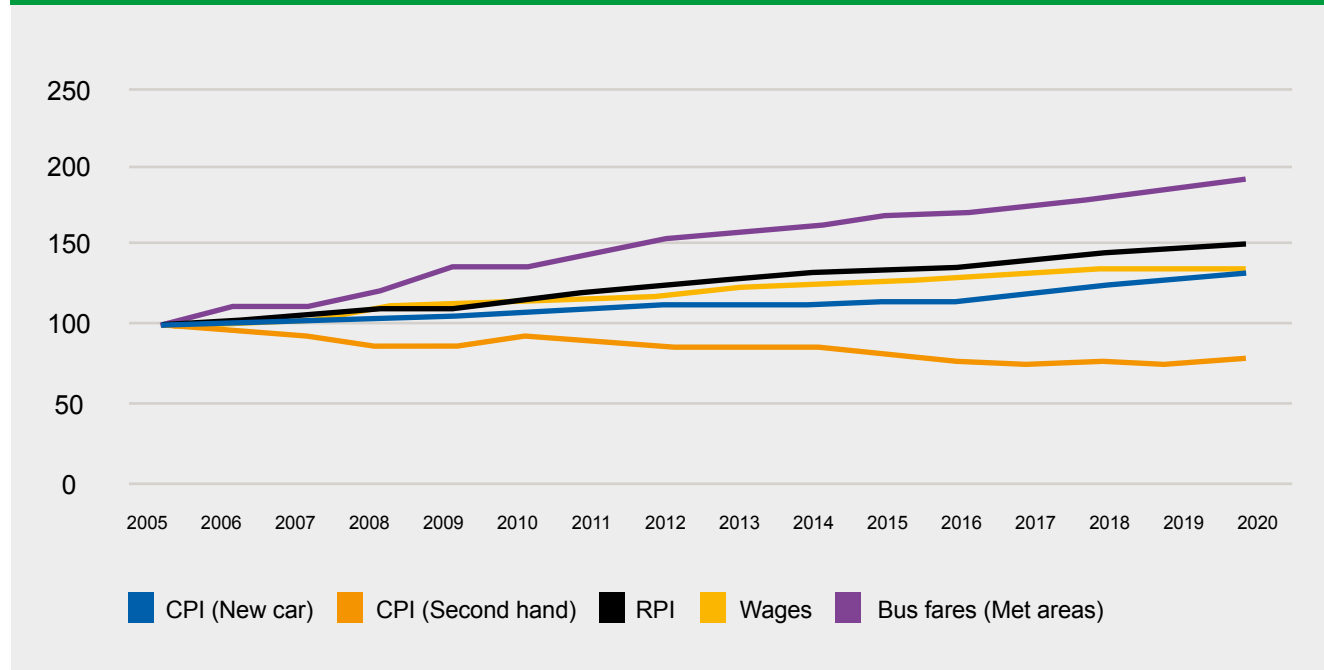
Transport poverty

Transport poverty is defined as households and individuals who struggle or are unable to make the journeys that they need. This can be the result of low income, poor availability of public transport and needing a long time to access essential services. The impacts of transport poverty are worst for disadvantaged people in rural areas according to a recent review.

Deprivation is concentrated in the urban centres of Tyneside and Wearside, particularly in towns and communities along the two river banks.

Over a third of Metro stations on the network are located in the bottom 20% of nationally defined areas of deprivation. As with the rest of the UK, recent decades have seen rising levels of car use and ownership in the North East. However, car ownership in the region is lower than all other English regions outside of London, highlighting the importance of affordable, sustainable transport as a means of reducing inequality and providing access to opportunities.

Figure 7: Comparison of wage inflation and bus fares



Relative affordability of public transport and car travel

The biggest barrier in a 2021 survey was the perception of bus fares being too high.

People may consider that the cost of a ticket on public transport is too expensive or may own a car and want to get maximum use out of it and cannot afford not to use it.

Over the last twenty years in real terms the cost of motoring nationally fell by 15%. Over the same period the cost of rail fares went up by over 20% and bus and coach fares by over 40%.

Figure 7 shows that wages have not kept pace with inflation (Retail Price Index) or with the prices of fares.

Affordability (actual and perceived)

Cost of Zero Emission Vehicles

Although outside of our remit, the cost of purchasing a ZEV can also be a barrier to the take up of Electric Vehicles.

With the sale of new petrol and diesel cars and vans to end by 2030 and from 2035 the commitment that all new cars and vans must be fully zero emission at the tailpipe, this is a challenge that must be addressed.

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The cost of insurance, petrol and car parking is a key reason that Rowan does not own a car and is reliant on public transport to get to job interviews.

Rising fuel costs

In 2022, prices are rising faster than wages. In March 2022, the UK inflation rate rose to 7%, the highest rate since 1992, driven by a sharp increase in petrol and diesel costs.

Information and messaging

Real-time information is a challenge for those open to using public transport in the North East as it is not network-wide and it is mainly accessed through a mobile app. This perhaps restricts those who are able to get this information.

As of June 2022, there is currently no single source of real-time pre-journey information available across the North East.

Information provision varies widely throughout our sustainable transport network. The modernity and quality of waiting facilities also range widely from high-quality interchanges in both rural and urban areas, to bus stops with no timetable, signpost or road markings.

A challenge is that many of the current transport information tools aren't responsive to short term changes such as delays, which means that the information is incorrect as to when the next service will arrive.

Another key challenge is the lack of internet access for many people in our region. The North East has the highest proportion of people who have no access to the internet (12.1%). This restricts these people from accessing accurate and up-to-date service information.

Integration

How integrated each type of transport is with another, affects the way in which people decide to travel.

Passengers have a choice and if travelling between different types of public transport is difficult, confusing and frustrating then they may perhaps stick to one type or alternatively travel by private car. This reduces access to opportunities.

For example, many services in the region are not connected in terms of timetables, so it is likely someone could get off the bus at an interchange but face having to wait a considerable period of time to board a connecting bus or rail service.



Another of our personas, Jo, faces similar issues when she attempts to travel with her parents, one of whom is in a wheelchair. Sometimes the accessible areas on board public transport are already taken by those who don't need the spaces, which leads her to rely more on her private car when caring for her parents.

Multi-modal ticketing

The North East offers a variety of ticketing products that allow interchange between different operators and types of transport, including buses, Metro, the Shields Ferry and some local rail services.

Consequently, there is still a complex range of brands, fare offers and a lack of standardised tickets for particular demographics such as young people.

Active travel

People have told us that the limits on the carriage of cycles on buses and trains and the different booking arrangements between train operators remains confusing and continues to act as a barrier to use. This is in addition to the lack of cycling facilities discussed earlier in this chapter.



Journey times and reliability (actual and perceived)

Perceptions of the reliability and punctuality of buses in our region, as well as their actual performance, are a barrier to bus use.

The journey times, frequency and average speeds for local rail services in the North East are not comparable with the private car.

Currently, a car is faster than a direct train to travel from Newcastle to Middlesbrough in the Tees Valley and a journey by train from Sunderland to Darlington.

Active travel

Many people hold the perception that the journeys they need to make are too far in length to be taken on foot or by bike. Based on a 2020 survey, 24% of the regular everyday journeys that people make were less than one mile and 50% were between 1 and 5 miles in length. Arguably, this shows that many of these journeys are capable of being made by walking or cycling, even if only in part for the longest end of the journey range.

This misperception of journey length is likely caused, at least in part, by people not having the time, ability, or confidence to test their regular journeys using active travel.

Seasonality on the use of active travel

Active travel use is affected by seasonality. Some research participants acknowledged that they were more likely to walk or cycle in spring and summer, and in good weather.

Weather could be a perceived barrier such as not walking or cycling to school or work because of poor weather.



This is the case for Sam, who is concerned about getting home from the city after work as a lone female traveller. She's used her car to do this for some time, primarily because she thinks that public transport takes longer to make journeys and is less direct, but secondly because she doesn't deem it safe.

Road network

The North East has a comprehensive and extensive road network.

However, this network carries increasing levels of congestion, with high proportions of car usage in urban centres including Newcastle, Durham, Gateshead and Sunderland. This congestion imposes costs on our society, to the economy, where it is estimated to cost £236 per driver each year and is leading to increasing journey times.

Reliability of public transport

Perceptions of the reliability of public transport is an issue to many people living in the North East. Residents regularly consider the bus not turning on time a key barrier and prevented them from using the bus. If people travelling are not confident in the reliability of the transport network, they simply will not use it. Often, if a person has a negative experience during their journey they would not use it again. Additionally, passengers want certainty that their train will arrive on time.

6. Where do we want to be?

Where do we want to be?

Introduction

The aim of this strategy is to set out ways in which we can make it easier for people to travel sustainably. We need to reflect the barriers people face and every day needs of people travelling to work and education – this includes young people, working parents and the elderly.

This strategy sets a target to encourage car users to switch one journey a week to public transport, walking or cycling and for people who don't have access to a car to continue to travel sustainably.

We believe that mobility is good and active travel is the cheapest and healthiest way to get around. That is why we want to encourage people to be more physically active where possible.

This would have a big impact on carbon emissions, make people healthier by improving mental and physical wellbeing, and make our roads and streets safer and cleaner places. Enabling people to make more journeys actively or using public transport will be the most significant way of achieving our transport objectives.

To do this, we will need to win the hearts and minds of travellers across the region – people who often lead busy and complex lives, and who may not currently consider that sustainable travel is a viable option for them.



For car users to switch one journey a week to public transport, walking or cycling and people who don't have access to a car to continue to travel sustainably, we need to look at breaking down barriers to greener journeys – whether they're real or perceived barriers. This is why we need local people to share their thoughts and ideas to help make sustainable travel easier for everyone. This small change will mean at least 200 million more trips will be made by sustainable forms of travel each year, benefiting our environment and public health.

This chapter sets out where we want to be over the next five years for each of our identified barriers:

- Accessibility
- Affordability (actual and perceived)
- Information and messaging
- Coordination and integration
- Journey times and reliability (actual and perceived)

We need to build on this and ask residents and businesses what we need to introduce to enable people to convert just one of their weekly journeys currently made by car to sustainable travel.

It is important to note that the interventions set out as part of this strategy won't address some of the challenges that follow. The work we are doing through our other transport strategies and multi-million pound investment programmes will. It is the aim of this strategy to identify where there are gaps to make sure that everything we are doing boosts the uptake of sustainable travel.

Safety (actual and perceived)

We want to increase the use of active travel by making the North East a safer place to walk, wheel or cycle. Safety will be the first consideration in the design of all new transport schemes and programmes to support people making the right travel choice.

On our road network, the needs of all users will be considered, ensuring that conflicts between the most vulnerable road users and other traffic are reduced to improve road safety. We want to be in a position where there are more direct and safer routes to public transport hubs for pedestrians and cyclists which are well maintained, with attractive and well-designed waiting facilities.

People who wish to walk or cycle will be confident using the network as cycling routes will be safe, secure and segregated where possible to make it a natural choice for their journey, such as home to school trips. This will be considered mainly as part of our forthcoming North East Active Travel Strategy.

Groups identified as feeling unsafe either travelling by walking and cycling, or on the public transport network will have a renewed confidence using the network, ensuring that more people travel sustainably from home to work for example.

Cleaning regimes on buses and Metros will continue to be of the highest importance to operators, ensuring that the network is safe. Passengers will no longer have concerns about this and through concerted efforts, current non-users will also be aware of how clean and secure the sustainable network is.

Accessibility (actual and perceived)

We want to be in the position where people who live, work and visit our region have excellent accessibility to an integrated public transport network that connects more people to employment and education opportunities.

This means a more accessible sustainable transport network which offers a feasible alternative to travelling by car, including high-quality connections. We want to narrow the gap in public transport provision between urban locations and rural communities in the North East.

Where people need to travel by car or van, we will encourage them to use a Car Club, or order a Zero Emission Vehicle (ZEV) taxi, or own outright a ZEV car or van, because the region will have a world-leading electric charging infrastructure offer.

We want to make it easier for people with restricted mobility to travel sustainably. We will recognise there is a clear need for services, such as taxis and private hire vehicles, to

help people with mobility difficulties travel independently, who for specific users they are a lifeline. This also means ensuring people with mobility issues can access and use the integrated network.

We want the region to have regular high-quality public transport services which connect people to employment, education and leisure locations with competitive journey times to the private car. We want to ensure that new housing and economic development in the North East has good active travel and public transport links built in from the outset.

Affordability

We will address perceptions of the affordability and value for money of public transport fares. We also want to reduce the impact of transport poverty, by ensuring our sustainable transport network can get both current and non-users where they want to be, at a price considered affordable and that public perception represents fares as being good value for money.

Information and messaging

We want local people to consider using sustainable transport an attractive choice. We want our strategic marketing and messaging to attract people who haven't used sustainable travel before as well as 'win back' former users to grow public transport patronage and get more people travelling actively. We want our messaging to reassure people that public transport is safe, breaking down perceived barriers to use.

There is a need to address the perceptions of reliability and the convenience of public transport, through accurate and easy to access information, whilst enhancing the customer experience through refurbished public transport stations, and integration with the wider sustainable network.

Coordination and integration

We want to have an improved, seamless, coordinated and integrated transport system across the North East which includes network-wide ticketing and journey planning being made easily available to passengers.

We want to encourage more multi-modal journeys in which a user may use a car for part of their journey, then switch onto a sustainable form of transport.

We want to make public transport easier to understand for new customers. We also want to achieve increased accessibility to an integrated sustainable transport system for people in rural areas, connecting them more effectively to main bus routes and railway stations, which have adequate cycle storage.

Integration of different types of transport will allow passengers to make sustainable travel choices across the whole of the North East.

Journey times and reliability

We want public transport end-to-end journeys to be faster and more competitive with the private car.

We want to address actual perceptions of public transport reliability by ensuring services are more punctual and improve perceptions that services will arrive on time through the greater use of real-time passenger information.

We want the North East to have reliable active travel infrastructure in place so it can be used year-round, addressing perceptions that walking, wheeling, and cycling is just for warmer and drier months.

We want to enable switching short car journeys to cycling and walking where possible. We also want to make our roads flow better for goods and essential car and van journeys, improving journey times and efficiency.

Making the right travel choice 'decision tree'

We want people to consider using the decision tree as a guide to see whether they can convert one of their weekly journeys currently made by car to active travel or public transport if possible.

At the start of the decision tree, the first question asks people to consider whether the journey they are planning to make can be made by walking, wheeling or cycling.

If not, we then ask people to consider whether their journey can be made by public transport such as by Bus, Metro or Rail.

If the journey cannot be made by walking, cycling or by public transport either due to personal or journey circumstances, then we ask people to consider travelling by car. The first consideration of travelling by car on our roads should be whether the journey could be made by the use of a car club, a taxi or private hire vehicle or a Zero Emission Vehicle (ZEV), rather than by a petrol or diesel vehicle.

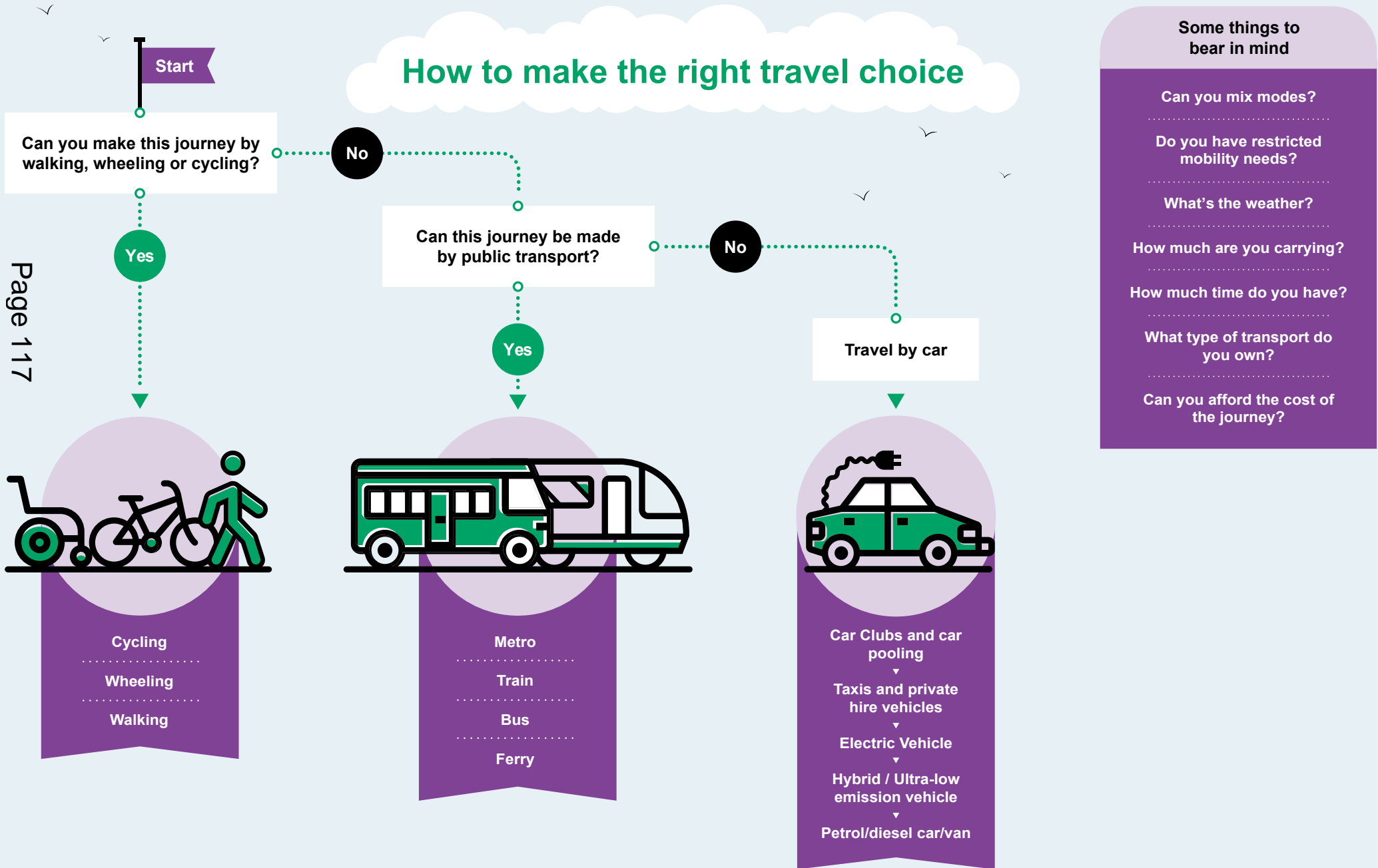


Figure 8: Making the right travel choice decision tree.

Personas

We have used the decision tree to help our personas to make one journey a week by sustainable transport, based on their individual and journey circumstances which we set out on pages 13-15. These examples are intended to help people to consider choosing a more sustainable and greener travel option for just one weekly journey.

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We think Leigh would be able to switch a shopping trip. If he is going to collect the essentials, like milk or bread, then he could consider walking or cycling instead of driving his car. However, if he's going to collect a large weekly shop from the supermarket he probably needs to drive.

To make car journeys more sustainable, Leigh could consider joining a local car club for frequent journeys or book a Zero Emission Vehicle taxi. These options have the potential to significantly reduce Leigh's carbon footprint in the long-term for his necessary car journeys.



Take Jo for instance. She is an example of someone, who because of the nature of their work, personal circumstances and rural location, would not be able to get everywhere they needed via public transport or active travel for every journey. For Jo, we think the car will be the right choice for many of her weekly journeys.

To make her journeys more sustainable, she could consider replacing her current diesel vehicle for a zero emission vehicle. That's not to say Jo can't use public transport at all, in fact when she is caring for her parents, they could travel together via bus or Metro safe in the knowledge that the vehicles are accessible, and guarantees are in place should the accessible spaces ever be fully occupied at the time of travel. This could be her additional sustainable journey each week.



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As an example, Bobbie and her parents could travel to and from school by foot more frequently given it is within walking distance, if the street infrastructure was improved near to the school and made safer.

This may not be possible every day, but we could encourage Bobbie's parents to walk to school once a week or as and when their working day allows. If they introduced more greener journeys there would be a clear benefit to their health and wellbeing, as well as a reduction in unnecessary car journeys during peak travel times.



In the case of Mohammed, who is 78 years old and travels frequently to see family and friends, the places he wants to visit are beyond the distance he is able to walk or is comfortable cycling, so public transport is his best alternative.

However, his semi-rural location won't always make this easy, which is why in some cases he may need to still travel by car if he is meeting at a time or in a place that isn't well served by public transport. In these instances, using Park & Ride services will be key to minimising the amount of car mileage, which will reduce his carbon emissions and save him money on fuel.



An example where active travel and public transport are both viable is Rowan, who is 24 and has been looking to find employment since 2020.

The main journeys Rowan is making are to interviews locally, in this case walking could be his additional sustainable journey, also enabling health benefits. If the interviews he is travelling for are outside the city, a cheap and sustainable travel option would be to travel by Bus, Metro or local rail.



For Sahira because of the varied trips she needs to make juggling the school run and working, switching one of her weekly journeys will depend on the situation. For example, where time allows Sahira has the potential to use public transport to get to general appointments, run errands and pick her children up.

This will save her some time and it would reduce carbon emissions and air pollution. Where she is pushed for time, particularly during the working week, there is an appreciation that Sahira will likely continue to use her own car to get around. She may start to think about purchasing a Zero Emission Vehicle in time.



In Sam's case, utilising one of the region's Park & Ride facilities could be an effective way of switching to a more sustainable journey a week, as she can be confident that her onward journey will be accessible on public transport given her additional mobility needs.

Sam's actions will hopefully encourage her employees to make greater use of public transport through word of mouth, as this is a sustainable method of getting in the office. This means they could have a less stressful commute as they aren't having to contend with heavy traffic during the drive to work.



Alex could easily switch to make one additional sustainable journey per week. They live in a suburban area, and their main journeys to work and college as a manufacturing apprentice are well served by public transport.

Using the decision tree, it is apparent that Alex's entire journey could not be made using active travel as they live too far away and work varied shift patterns, meaning they would sometimes be travelling at night, which they don't feel confident doing. However, using multiple modes of transport would be the best option to get Alex where they need to go. This could be cycling to and safely storing a bike at a transport interchange, then using the Metro, Ferry, bus or a combination of them to reach their final destination.

7. Case studies

Tyne and Wear Metro 'Take the Kids for Free' offer

In early 2020 Nexus introduced a new offer for passengers called 'Take the Kids for Free'. This initiative allows up to three children (aged 11 and under) to travel for free with a fare paying adult. A fare paying adult was defined as anyone with a valid adult ticket, including season ticket holders and Gold Card holders. The offer was initially introduced on weekends and proved to be successful before the onset of the Covid-19 pandemic. With restrictions lifted over summer 2021, Metro expanded the scheme to a daily offer.



Boosting sustainable leisure travel along the North Northumberland Coast

Northumberland County Council has worked with bus operators Arriva and Travelsure as well as other stakeholders for several years to encourage more sustainable leisure travel by bus along the North Northumberland coast.

The campaign delivered simple and easy to understand routes, coordinated schedules for both the summer and winter seasons, joint marketing using a common 'Coast and Castles' brand and a unique multi-operator Travelcard scheme covering a dedicated range of tickets.

Arriva and Travelsure have now been consistently recording growth of 1-2% per annum, allowing investment in new or refurbished vehicles and more journeys to be added to timetables (especially on Sundays and Bank Holidays).



Cobalt Business Park – North Tyneside

Cobalt Business Park in North Tyneside has a Travel Plan to support the whole site and help promote greater use of walking, cycling and public transport as well as discouraging the use of cars, especially single occupancy vehicle trips. The business park saw demand for cycling grow in 2020.

Cobalt employees are offered the Cobalt More Card, entitling the holder to free travel on any bus service within the Cobalt Free Zone and discounts on travel

Tickets including 5% off the cost of the Network One Annual Pass which can be used on bus, Metro, ferry and trains.

Go-Hi

Go-Hi Mobility as a Service (Maas) platform, launched by the Highlands and Islands Transport Partnership (HITRANS) in June 2021, aims to improve accessibility to integrated transport services for residents, tourists, and business travellers in Scotland's Highlands and Islands regions and beyond.

It integrates multiple transport and travel options into one app, providing more journey planning capabilities, easier access to travel information, in-app ticketing and a simple payment system. It allows users to plan, book and pay for end-to-end multimodal journeys in a single transaction using a smartphone or desktop device. The platform offers instant access to buses, trains, ferries, taxis, car clubs, car rental, bike hire, domestic flights, demand responsive transport and hotels allowing users to plan bespoke door-to-door journeys.

There were over 1,500 downloads of the app in the first year of operation.

Walk Once a Week

Walk Once a Week is a project ran by Living Streets, a charity for everyday walking in the UK, involves primary schools and encourages children to walk to school at least once a week. At the start of each school day children are asked to record how they have travelled to school. They get points based on how sustainable their journey to school has been and are given sticker badges as rewards. The project can be used for class and school competitions with the goal of encouraging sustainable travel and reducing car use.

Walk Once a Week schools see, on average, a 30% reduction in car journeys taken to the school gate and a 23% increase in walking rates.

8. Measures of success

Measures of success

The key measure of success of this strategy will be achieving growth in the number of people using sustainable travel types such as active travel and public transport.

Enabling people to make more journeys actively or using public transport will be the most significant way of achieving our transport objectives.

Firstly, we want to repair the damage caused by the pandemic to public transport use in the North East. We then want to progress to a position where a higher proportion of people choose to travel more sustainably, especially for journeys to work and education. This will lead to growth in sustainable transport use.

We know that for some trips, people may still need to travel by car or van because of the distance involved and their personal and journey circumstances. This is why the greater take up of Zero Emission Vehicles (ZEVs) are important so that even journeys that do need to be made by car or van can also help to achieve our objectives.

Target

On average, people in the region make 19 trips a week. There were an estimated 90 million trips under one mile and 750 million trips under five miles made by car in the North East in 2018/19.

This strategy sets a target to encourage car users to switch one journey a week to public transport, walking or cycling and for people who don't have access to a car to continue to travel sustainably.

This small change will mean at least 200 million more trips will be made by sustainable forms of travel each year, benefiting our environment and public health. Little changes have a big impact, and if we each increase our green journeys by even a small amount that will take us towards achieving our vision and objectives. Little changes have a big impact, and if we all increase our green journeys by even a small amount that will take us towards achieving our vision and objectives.

Benefits

If car users switched one journey a week to public transport, walking or cycling and people who don't have access to a car to continue to travel sustainably this would:

- Potentially save around 214,000 tonnes of CO2 emissions a year;
- Potentially reduce poor health caused by road traffic emissions. It is estimated that poor air quality is responsible for around 360 deaths each year in central Tyneside alone;
- Result in more people becoming active, improving healthy life expectancy (HLE);
- Potentially save petrol and diesel car drivers approximately £170-190 per year (based on June 2022 fuel prices).

We propose to set a target of encouraging people to convert just one of their weekly journeys by walking, cycling, or using public transport instead of a petrol or diesel car where possible.



- If car or van drivers who were making trips less than 1 mile walked instead, there could be approximately 60 million more walking trips a year. This would bring an estimated £12.5 million of economic benefits for the North East (based on Sustrans' figure of 26p benefit per mile).
- If 10% car or van drivers who were making trips of between 1 and 5 miles cycled instead, there could be approximately 44 million more cycling trips a year, generating an estimated £110 million in economic benefits for the North East (based on Sustrans' figure of £1.15 benefit per mile).

North East Transport Plan KPIs

Achieving this target and following this strategy will achieve the following KPIs as set out in the North East Transport Plan.

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Sustainable travel



Sustainable journeys:

33%

of journeys to be made by public transport, walking & cycling.

Increase the take up of Ultra-low emission vehicles (ULEVs)



Accelerated take-up of ULEVs is an essential component for meeting

net zero carbon

emissions from transport.

Improving road network performance



Our road network needs to operate more effectively. 100% efficiency means that all traffic is flowing without any hold-ups or delays.

In 2019 our network operated at

71.8%

of this.

Climate action



Reducing transport CO2 emissions per capita currently:

1.7 tonnes

the lowest outside London.

Improving air quality



Successfully encouraging a switch from private car to sustainable travel

will also improve air quality.

Reduce motor vehicle miles per head



Without successful interventions and alternatives, motor vehicle mileage per head

will grow

in our region in the years ahead.

9. How do we get there?

How do we get there?

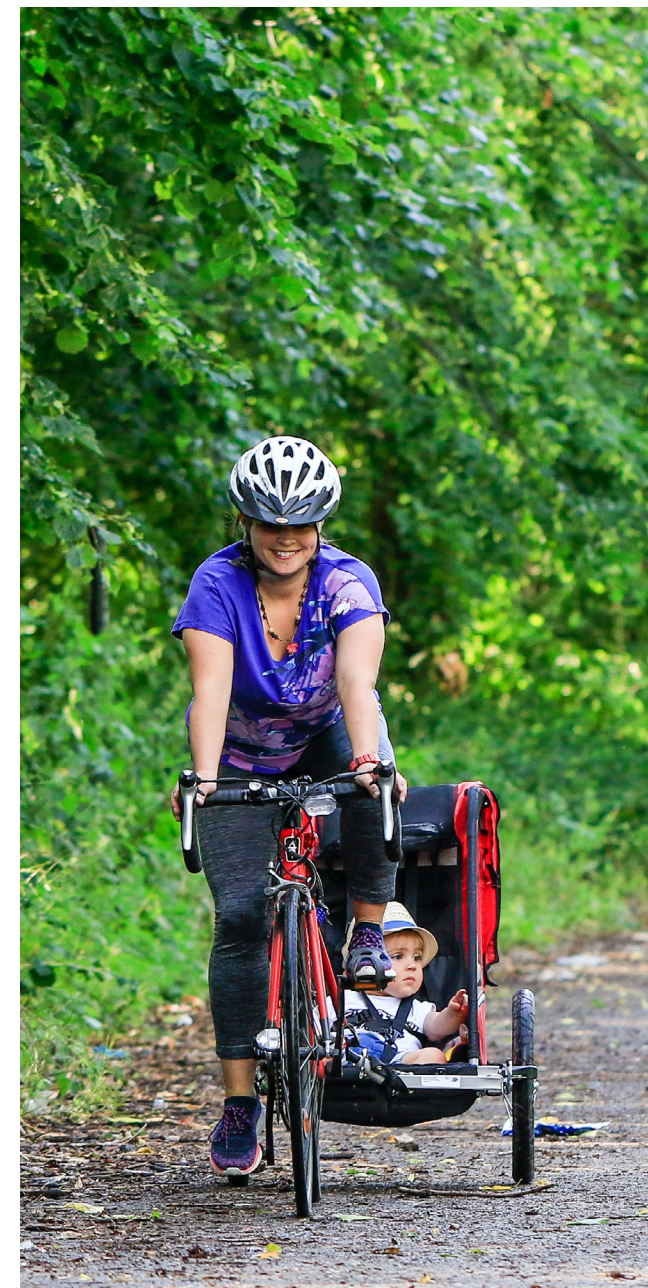
In this chapter we set out what is required in order to get where we want to be and they key themes from our research with North East businesses and residents, to develop a set of recommendations to take forward.

This will help us achieve our target of asking car users to switch one journey a week to public transport, walking or cycling and people who don't have access to a car to continue to travel sustainably.



As part of the research, businesses were asked about any specific support or interventions which could support businesses to help their employees to switch to using sustainable travel. The following suggestions were made:



- Ensuring closer relationships between transport operators across the North East so that the transport system is more integrated and easier to use for customers;
- Making quality improvements right across the region's whole transport network, as well as extending the network itself;
- Supporting better use of integrated technology such as improved travel information, an enhanced central website, and better network-wide ticketing;
- Undertaking high profile campaigning.

We have used these findings to create a set of key commitments. We have also listed a delivery plan schemes which enable and encourages car users to switch one journey a week to public transport, walking or cycling and also supports people who don't have access to a car to continue to travel sustainably.








Summary of key themes and commitments:

Theme	Key commitments	Objectives which will be achieved
<p>1. Raising awareness and messaging</p> <p>Page 130</p>	<ul style="list-style-type: none"> We will appoint an Active Travel Ambassador for the region, who will champion and promote cycling and walking. We will work with education and training providers to promote sustainable travel within schools. We will work with employers, to promote sustainable travel for journeys from home to work. Options may include a Travel Plan Coordinator. We will continue to make use of the Go Ultra Low North East brand, as a way to market and promote activities to support the uptake of electric vehicles for journeys that need to be made by car or van. We will review our existing messaging to ensure that we make people feel capable, provide the opportunity and motivate people to make the right travel choice. We will work with partners to promote active travel for last mile of people’s journey. We will work together with public transport operators in the region to actively target new people to use public transport to grow patronage. This means developing specific plans and schemes to attract journeys from car including promoting Park & Ride. We will consider messaging which links environmental impact and travel choices more explicitly, such as through journey planning apps that include carbon emissions information for different modes of transport. We will ensure positive messaging which promotes the mental and physical health benefits and of active travel. We will consider messaging which compares cost of car use (fuel, insurance, maintenance, wear and tear, parking etc.) with that of public transport. 	 

<p>2. Incentives</p>	<ul style="list-style-type: none"> We will work with North East employers, education providers, tourism organisations and other key partners to develop new and improve existing incentives for the use of sustainable transport. We will work with regional stakeholders to develop and promote existing value-based initiatives such as gamification to encourage public transport uptake. Gamification is an online marketing technique to encourage engagement with a product or service. 	
<p>3. Making sustainable travel more competitive with the private car</p>	<ul style="list-style-type: none"> We will strive to make sustainable travel options easier, more accessible, reliable, and affordable to be competitive with the private car by developing improvements such as multi-modal passenger information, showing real-time information. We will ensure that all recommendations, policy statements and commitments made in our current and forthcoming transport strategies develop quality improvements right across the network to make it easier for people to make the right travel choice. 	

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Key

-  – Carbon neutral North East
-  – Overcome inequality and grow our economy
-  – Healthier North East
-  – Appealing sustainable transport choices
-  – Safe, secure network

1. Raising awareness and messaging

It is clear that undertaking high profile campaigning to raise awareness is required to encourage and enable car users to switch one journey a week to public transport, walking or cycling and also support people who don't have access to a car to continue to travel sustainably.

There is a need for a regionally co-ordinated and branded sustainable travel behavioural change campaigns which focus on common journey types, such as commuting to work, and home to education and training.

Whilst we recognise that it will not always be possible for people to make their entire journey by active travel and public transport, we will encourage people to consider travelling sustainably for at least part of their trip where possible.

We will also raise awareness of shared mobility services such as car clubs, cycle and e-scooter hire through co-ordinated campaigning.

In more remote rural areas such as large parts of Northumberland and Durham, where walking, cycling and public transport are not always practical transport options, car clubs can provide a practical and cost-effective alternative to car ownership, reducing overall car use whilst offering access to a car for longer journeys.

The North East's Bus Service Improvement Plan sets out the need for a significant marketing and information campaigns to drive growth in bus patronage and to highlight key improvements and initiatives. Activities would be delivered on the ground by a range of partners (including bus operators, Nexus and Local Authorities), amplified by partnership-level campaigns.

We also must raise awareness to support the uptake of Zero Emission Vehicles (ZEVs) for those already travelling by petrol or diesel cars. ZEVs provide a sustainable, emission-free option for journeys that need to be made by car or van and cannot be made by active travel or by public transport.

In 2022, public transport operators have been reassuring customers public transport is safe, overcoming negative messaging throughout 2020 and 2021.

There will need to be continued comprehensive, targeted publicity, highlighting steps that are being taken to maximise personal safety and minimise risk.



Messaging can also play a role in encouraging more people to consider cycling. For example positive messaging which sets out what is being done to address safety concerns of cycling and how the region is working to overcome barriers such as perceptions of personal safety.

We will highlight the health, social and community benefits that accompany initiatives which create more space for walking and cycling and safer spaces for children to play.

We will consider positive active travel messaging such as the numbers of cars that cycling would take off the road every day, its role in preventing long-term health conditions, the amount of tonnes of greenhouse gas emissions it saves, and the economic benefits.

We will also promote regional walking and cycling maps throughout the year through a specific awareness campaign to promote the benefits of active travel.

Key commitment(s)

- We will appoint an Active Travel Ambassador for the region, who will champion and promote cycling and walking.
- We will work with education and training providers to promote sustainable travel within schools.
- We will work with employers, to promote sustainable travel for journeys to work.

- We will continue to make use of the Go Ultra Low North East brand, as a way to market and promote activities to support the uptake of electric vehicles for journeys that need to be made by car or van.
- We will review our existing messaging to ensure that we make people feel capable, provide the opportunity and motivate people to consider travelling more sustainably.
- We will work with partners to promote active travel for last mile journeys.
- We will work together with public transport operators in the region to actively grow patronage. This also means promoting Park & Ride for multi-modal journeys.
- We will consider messaging which links environmental impact and travel choices more explicitly, such as through journey planning apps that include carbon emissions information for different modes of transport.
- We will ensure positive messaging which promotes the mental and physical health, economic and environmental benefits of active travel.
- We will consider messaging which compares cost of car use (fuel, insurance, maintenance, wear and tear, parking etc.) with that of public transport.

2. Incentives

It is clear that incentives will be necessary to encourage and enable car users to switch one journey a week to public transport, walking or cycling and also support people who don't have access to a car to continue to travel sustainably.

We will support public transport operators to introduce product ranges, such as fare trials/ taster tickets for employees and unemployed people, enabling them to try out different forms of transport.

Gamification incentives such as loyalty schemes and discount offers should also be considered to encourage people to switch a journey a week to public transport, walking or cycling.

Key commitment(s)

- We will work with North East employers, education providers, tourism organisations and other key partners to develop new and improve existing incentives for the use of sustainable transport.
- We will work with stakeholders to develop and promote existing value-based initiatives such as gamification to encourage greater public transport use.

3. Making sustainable travel more competitive with the private car

Research commissioned by the Department for Transport found that travel decisions are driven primarily by convenience and cost, so to be competitive with the private car, sustainable travel options must be easy, accessible, reliable, and affordable.

We will continue to work with local authorities and transport operators to promote a shift towards public transport and reflect user and non-user feedback to make using sustainable transport more attractive and accessible.

We will promote the benefits of the forthcoming Enhanced Bus Partnership, Metro Flow scheme and the 46 new Metro trains which will deliver a step-change in the passenger experience and reliability.

Through delivery of the North East Transport Plan and daughter strategies such as our North East Rail and Metro Strategy, our Enhanced Bus Partnership, and our forthcoming Active Travel Strategy we are bringing forward changes to our transport network. This will enable travelling sustainably to be more attractive and feasible by improving the whole journey experience for the user.

Through delivery of the North East Transport Plan and daughter strategies such as our North East Rail and Metro Strategy and our Enhanced Bus Partnership, and our forthcoming Active Travel Strategy we are bringing forward changes to our transport network. This will enable travelling sustainably to be more attractive and feasible by improving the whole journey experience for the user.

This means improvements such as upgrading cycling and walking links to and from stations and bike storage at stations to encourage rail users to start and finish their journeys using healthy travel types.

On a wider scale, as set out in the North East Transport Plan, we also need the funding to create a grade-separated regional cycle network, and maintain it in excellent condition, that links both urban and rural communities, is designed to a common standard and has a strong, identifiable brand; this will mean cyclists do not conflict with other road users and can travel longer distances including to link into bus, Metro and rail services.

Whilst not directly part of this strategy, the recommendations identified in these other documents are the key way in which we achieve our target of asking car users to switch one journey a week to public transport, walking or cycling and people who don't have access to a car to continue to travel sustainably, delivering the region's transport vision and five objectives.

This strategy will also deliver interventions to support and enable people to use the infrastructure improvements being delivered through our other strategies.

However, in this strategy in order to make sustainable travel more competitive with the private car, we recommend that the region takes forward high-quality information improvements such as introducing real-time journey planning which will be made available to passengers through a single dedicated website and accompanying app.

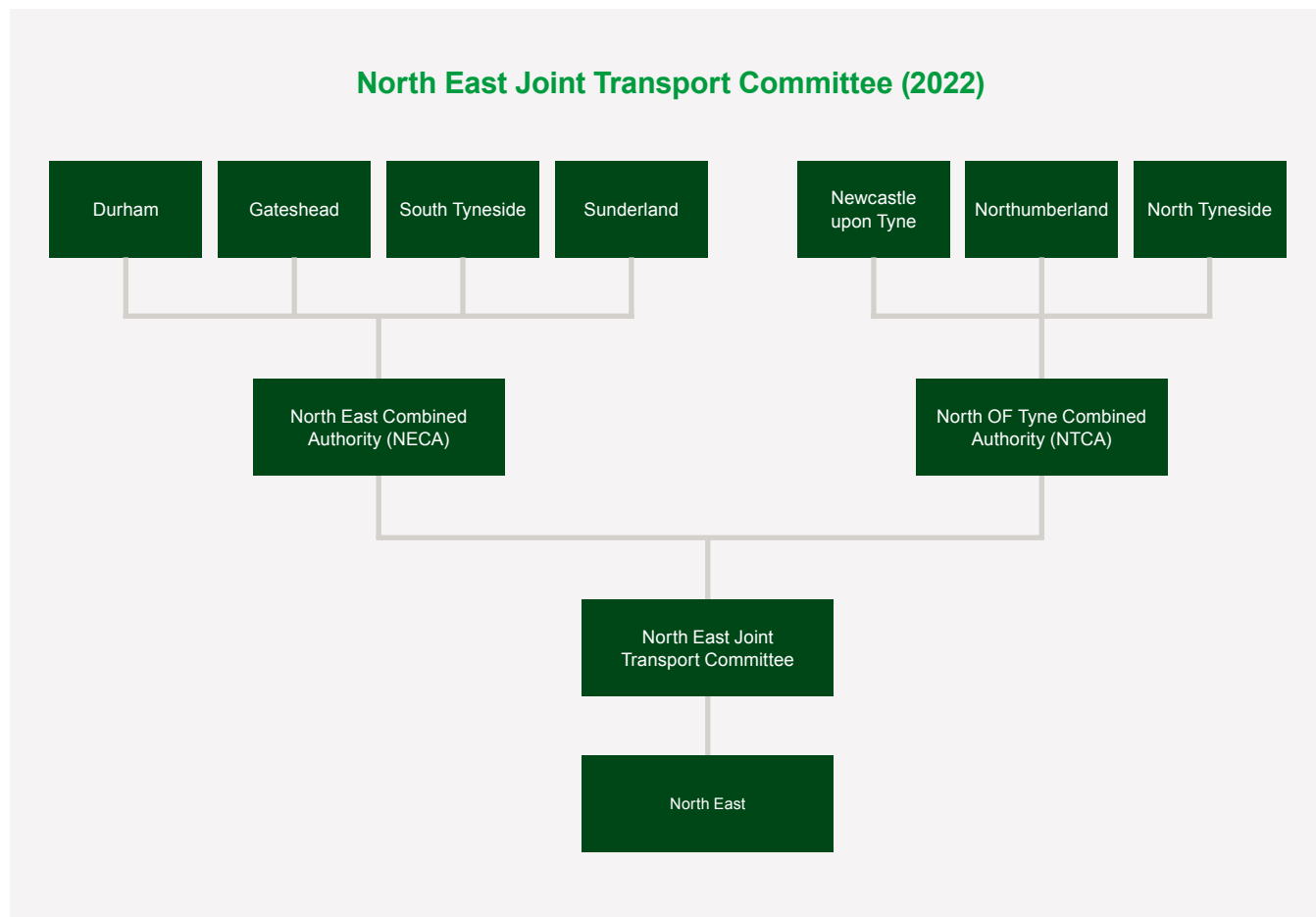
We will also ensure that where feasible, the region's transport interchanges and rail stations will be supported with passenger information, showing real-time information about connecting journeys.

We are also currently developing a new logo for the emerging North East Enhanced Bus Partnership that will be applied across the network, so that it becomes a recognisable symbol of quality public transport for the region.

Guaranteed support when boarding and alighting was cited as a factor that could encourage more people with mobility issues to use bus. We will work with operators to deliver a taxi guarantee which 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, as identified and set out in our Bus Service Improvement Plan (BSIP).

Key commitment(s)

- We will strive to make sustainable travel options easier, more accessible, reliable, and affordable to be competitive with the private car by developing improvements such as multi-modal passenger information, showing real-time information.
- We will ensure that all recommendations, policy statements and commitments made in our current and forthcoming transport strategies develop quality improvements right across the network to make it easier for people to make the right travel choice.



Delivering our strategy

To realise the ambitions of this strategy, the North East Joint Transport Committee (JTC) will work with stakeholders (including members of the public, local authorities, private sector bodies and the third sector) to deliver this strategy.

The North East Transport Plan includes a pipeline of projects that when realised will lead us to the achievement of our vision of moving to a green, healthy, dynamic and thriving North East.

Schemes identified in this strategy will be included in our transport pipeline and will be fully developed as projects in accordance with the North East Transport Assurance Framework. This will demonstrate the propositions are socially acceptable, economically viable and deliverable as well as supporting the achievement of objectives nationally, regionally and locally.

Identified programme

This strategy has utilised the using the Transport Plan Pipeline as a starting point, this strategy identifies schemes that will support people to make more sustainable journeys.

Initial schemes listed will achieve our target of asking car users to switch one journey a week to public transport, walking or cycling and people who don't have access to a car to continue to travel sustainably.

Our programme of investments stems from the North East Transport Plan as well as additional ideas garnered through consultation. All of these interventions have been tested to ensure that they are consistent with Transport Plan objectives and that they have a degree of deliverability.

All schemes will be subject to more rigorous testing and appraisal in line with our Assurance Framework. They will only be delivered where they have demonstrated that they can contribute towards the delivery of the objectives.

Funding

All schemes presented in this strategy are subject to funding and further development. Transport North East actively seeks out funding opportunities from all sources and these proposals will be developed to a state of readiness to ensure they can access funding through the appropriate stream.

Previous rounds of the Local Growth Fund (LGF) and Transforming Cities Fund show how the region can deliver significant packages of investment. The pipeline of schemes is live and will be refreshed on a regular basis.

Our schemes are ambitious and we estimate would cost £29m in revenue funding over a five year period. We will further refine cost estimates as schemes are developed further.

Making the right travel choice – Proposed list of schemes and interventions

- 1 – Raising awareness and messaging
- 2 – Incentives
- 3 – Making sustainable travel more competitive with the private car

Scheme name	Scheme description
Page 137 Creation of a regional behaviour change team	<p>We recognise that enabling transformative change in the way people travel in our region will not be easy. Therefore, to help people transition to a sustainable alternative, we will establish a dedicated Regional Behaviour Change Team. This will look at how we can ensure people in our region can make the right travel choice and that we make the right interventions by 2035 to migrate people over to more sustainable transport types.</p> <p>The team will also consider:</p> <ul style="list-style-type: none"> • Information and ticketing solutions • Education in schools • Marketing and information campaigns • Gamification incentives • Engagement with local communities and employers • Perceived and actual barriers to public and sustainable transport use such as transport poverty and affordability. • Current car club and carpool provision and where commercial models are not viable, investigate potential solutions to overcome this
Social prescribing	Working in partnership with North East GPs, nurses and other healthcare providers to create a behaviour change programme in which patients may be referred to improve their health and wellbeing through a range of activities.

Scheme name	Scheme description
<p>'Go Smarter to School' - sustainable travel programme</p>	<p>A regional Active Travel / Sustainable Transport Promotion within North East Schools.</p> <p>Initiatives part of the programme could include:</p> <ul style="list-style-type: none"> • A specific schools-based marketing and comms campaign with a logo and branding. • Working with the Department for Transport's national award provider for cycle training in England, bikeability, introducing cycle training for different age groups, including Balance Bikes (bikes with no pedal where the focus is getting children used to being able to balance). • Bike maintenance training. • Public transport projects supporting the transition children make from primary school to secondary school, so are able to confidently use public transport (including the walk / cycle to where they access the service) and understand the expected standard of behaviour whilst travelling on public transport. • Walk Once a Week – class / school competitions with points based on how active the journey to school has been, including hands up surveys, project mascot, sticky badges as awards (will need to include encouraging park and stride). • Child pedestrian training – educating primary school age children on how to cross the road safely. • Theatre in education – a play presented to secondary school students on the dangers of using mobile phones when travelling, how to avoid dangerous situations and what to do in an emergency, etc. • Extra assistance provided to a small number of schools where car travel to school remains high, where students are asked to think about the active travel options available to them and how the streets could be improved to make the journey safer and more comfortable. Findings can be provided to the relevant local authority. • A single online system available regionally to capture survey information as a baseline and during the period of activities to see what the improvements have been. • Bike tagging (working with Northumbria Police). • Parking enforcement at schools – supporting the use of vehicles at schools to fine individuals parking illegally or inappropriately around schools.

Scheme name	Scheme description
Upgrades to the two Urban Traffic Management Control for command and control of the network	<p>Upgrades to the two Urban Traffic Management Control systems to:</p> <ul style="list-style-type: none"> • integrate and link with neighbouring areas and Highways England. • incorporate cooperative Intelligent Transport Systems and incorporate improvements in Artificial Intelligence giving accurate count and vehicle classification data for our network.
Customer experience strategy	<p>A customers journey starts before they have even left the house. To make effective decisions customers we need to both provide the incentives to travel sustainably and break down the barriers from which to do so. We intend to develop a strategy which develops a high level accessibility standard for the region together with knitting together all aspects of the journey storyboard, setting expectations around how the transport plan will operate.</p> <p>This strategy will set out a framework for ideas around,</p> <ol style="list-style-type: none"> 1) Information and Ticketing; 2) Access to stations the public transport network; 3) Safety, access and security on the public transport network; 4) Access to destinations. <p>The second component will be built around an access audit framework with an application to a number of case study locations.</p> <p>A linked idea is that the strategy will be supported by funds in order to garner new ideas and make changes to the network to improve the quality and access of the system.</p>
Innovation challenge fund for smart places	<p>Creation of an innovation challenge fund to develop and trial smart place applications with SMEs, start-ups and social enterprises. This could include digital technology for apps/online information related to connectivity for first and last mile journeys, rural mobility, micro mobility, smart mobility (intelligent transport systems, trip repurposing technology, and demand-supply matching).</p>

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Scheme name	Scheme Description
Regionwide infrastructure mapping application	<p>Deliver a regional infrastructure and asset map which enables connectivity solutions to unlock further strategic growth sites (housing and employment) to be realised. This will include an online platform to enable local trade, deliveries and international exports. Will be achieved through engagement with the region’s freight and logistics industry, supporting connectivity between different transport modes.</p>
<p>Enhancing real-time public transport passenger information</p> <p>Page 140</p>	<p>Addressing the perception of reliability and convenience of public transport, as highlighted through market research, through the provision of accurate and easy to access information.</p> <p>Delivery of improved real-time passenger information including use of apps, social media, links from different sites, online, and interchange screens (making it clear it is real time rather than timetable) is key.</p> <p>Enhancements must include improved information on expected future delays such as expected roadworks, diverted routes, metro maintenance periods (including up to date info on replacement buses for the Metro).</p> <p>Greater integration across all sustainable transport including Park & Ride space and availability and location and number of EV charging facilities.</p>
Comprehensive ticketing and information package - including single smart transport payment system	<ul style="list-style-type: none"> • Sponsor the delivery of a comprehensive cross modal ticketing, information and planning services, solution built in partnership with authorities and operators. • Build on and integrate available data sources to help travellers and staff better manage and plan journeys on our network in real time. • Enhance back office systems including UTMC technologies. • Build databases and tools for transport planners to continually enhance the offer to travellers. • Deliver a single smart transport payment system that works across all modes and incentivises sustainable travel choices. • Adopt strategies and technologies to reduce the cost of maintaining and operating of ticketing and information assets whilst enhancing customer experience.

Scheme name	Scheme Description
Regional transport model and monitoring package	Development of a regional transport model for analysis and decision making together with monitoring tools.
Bringing contactless payment to Metro	To make Metro travel simple and convenient by introducing the ability to pay by contactless card or device with capped daily fares being charged. This would obviate the need to visit a ticket machine reducing the risk from any contamination introduced by touching. This introduces the ability to turn up and go without needing to make any ticketing provision in advance. For this to be introduced there would need to be investment in hardware at the gate lines and validators and also the back office to collect the taps and calculate and collect the best value fare.
'Go Smarter to Work' – sustainable travel programme	Active Travel / Sustainable Transport Promotion for employers and employees, specifically focusing on making journeys from home to work more sustainable.
North East Park & Ride promotion campaign	A campaign to promote the use of Park & Ride facilities in the region to encourage uptake and growth.
Mobility support guarantee	<p>A scheme which provides guaranteed support for those with mobility issues when using public transport.</p> <p>This could include a taxi guarantee to give disabled passengers the peace of mind that if there isn't room for their wheelchair on board a bus, a taxi replacement will be provided for them at no extra cost.</p>
Flexible transport solutions trials	<p>Development of emerging forms of flexible transport. Consideration would need to be given to trial opportunities such as car clubs, car sharing, electric bikes, electric scooters, taxi sharing, on demand bus and minibus services.</p> <p>Raising awareness of upcoming trials and initiatives would also be necessary to help to kick-start pilots and support operations for an initial defined period).</p>

Scheme name	Scheme Description
Regional promotional campaign for public transport and active travel	<p>A regionally co-ordinated and branded public transport and active travel promotional campaign to grow patronage.</p> <p>Campaign will champion recent infrastructure improvements, forthcoming improvements and refer to ticketing offers and raise awareness of cleaning regimes.</p>
Gamification pilot	<p>A trailed regional 'gamification' app to 'reward' people making more sustainably journeys.</p> <p>Gamification pilot schemes could also 'reward' people based on the number of sustainable journeys made, subject to scope and funding.</p>
North East travel plan accreditation scheme	<p>Encouraging travel plan take up, delivery and monitoring in businesses and education establishments when local officers / consultants engage with them as part of the Go Smarter to Work and Go Smarter to School programmes.</p> <p>This includes setting up accreditation schemes so best practice is recognised, including use of comms activities where appropriate.</p>

Conclusion

Conclusion

The challenges		Our aims		Outcome	
<p>Estimated that at least 33% of trips in the North East less than 5 miles made by car.</p> <p>Estimated 90 million car trips a year under 1 mile.</p>		<p>Preventing a car- dominated recovery.</p>		 Carbon neutral North East	
<p>Page 144</p> <p>in 4 adults in the North East are physically inactive costing the region's NHS in excess of £19million per year.</p>		<p>Breaking down barriers to greener journeys to increase % share of walking, cycling, and public transport.</p>		 Overcome inequality and grow our economy	
<p>Poor air quality responsible for around 360 deaths each year in central Tyneside alone.</p>	<p>></p>	<p>A target of encouraging car users to switch one journey a week to public transport, walking or cycling and for people who don't have access to a car to continue to travel sustainably.</p>	<p>></p>	 Healthier North East	
<p>North East Road congestion estimated to cost around £236 per driver per year.</p>		<p>Greater take up of Zero Emission Vehicles (ZEVs) for necessary car / van journeys.</p>		 Appealing sustainable transport choices	
<p>662 people were killed or seriously injured in 2021 on the roads in our region.</p>				 Safe, secure network	

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North East Joint Transport Committee

Date: 12 July 2022

Subject: Proper Officer for Transport – Delegation regarding staffing

Report of: Monitoring Officer

Executive Summary

The report asks the Joint Committee to consider amending the Proper Officer for Transport's delegations to include the creation of new posts below the level of Deputy Chief Officer to carry out its transport function, subject to the availability of budget provision.

Recommendation

The North East Joint Transport Committee is recommended to agree to the following delegation to the Proper Officer for Transport:

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

1. Background Information

- 1.1 Article 9(5) of the Newcastle Upon Tyne, North Tyneside and Northumberland Combined Authority (Establishment and Functions) Order 2018 ('the 2018 Order') requires the Joint Transport Committee to designate an officer as 'the proper officer for transport', being 'the principal officer to assist the committee in its exercise of the transport functions exercisable by the committee'.
- 1.2 In addition, the Joint Transport Committee's Standing Orders (January 2019) identify the following as the duties of the Proper Officer for Transport:
- a) working with the Chairs and Vice Chairs of the Joint Transport Committee, its Committees or Sub-committees to recommend the business to be considered at each meeting;
 - b) Working with the staff of the North East Combined Authority to develop a committee timetable which meets the needs of the Joint Transport Committee work programme;
 - c) To co-ordinate the reports on the use of delegated authority discussed in Part 4.5 of these Standing Orders;
 - d) To work closely with the Chief Executives of the Constituent Authorities to determine matters of the highest strategic authority in relation to regional transport matters.
- 1.3 In June 2020 the Joint Committee agreed a scheme of delegation to the Proper Officer to enable streamlined decision-making to support operational delivery, while incorporating appropriate checks and balances through the application of thresholds and/or the agreement of other chief officers of the JTC. However, the scheme did not include the creation of new posts to carry out the transport function, and all changes to the existing TNE staffing structure and operational staffing matters have therefore been reported to the Joint Transport Committee (the JTC) for approval.
- 1.4 TNE has demonstrated its effectiveness in the development of the North East Transport Plan 2021-2035 and its securing and administration of funding on behalf of the JTC major funding for its delivery: most recently evidenced through an indicative award of £163.5 million for the Bus Service Improvement Plan (BSIP).
- 1.5 It is therefore proposed that an appropriate power to create new posts for staff within TNE is delegated to the Managing Director (as Proper Officer for Transport).
- 1.6 The Head of Paid Service (HOPS) would remain responsible for the corporate and overall strategic management of NECA's staff in accordance with section 4 of the Local Government and Housing Act 1989.

2. Reasons for Proposals

- 2.1 To enable effective and timely decision-making in supporting operational delivery of the transport function.

3. Alternative Options Available

3.1 The Committee may wish to make alterations to the recommended delegation or decline to approve it.

4. Next Steps and Timetable for Implementation

4.1 If agreed, the new delegation to the Proper Officer for Transport will come into effect immediately and the consequent changes to the Joint Transport Committee's Standing Orders will be made by the Monitoring Officer in due course.

5. Potential Impact on Objectives

5.1 Agreement to the delegations proposed will allow for effective and timely decision-making on behalf of the Joint Transport Committee while maintaining a system of good governance.

6. Financial and Other Resources Implications

6.1 There are no specific financial implications arising from the recommendation. The proposed delegation makes clear its exercise is subject to the availability of the associated budget provision.

7. Legal Implications

7.1 The recommendation is consistent with the intention within the 2018 Order for the Proper Officer for Transport to assist the Joint Transport Committee in the exercise of its transport functions.

8. Key Risks

8.1 Any risks associated with the delegation are mitigated by it being limited to the appointment of staff below Deputy Chief Officer level, and it being subject to the availability of budget provision.

9. Equality and Diversity Implications

9.1 There are no implications for equalities and diversity arising directly from this report. Any appointment made in exercise of the delegation will be in accordance with the obligations of the North East Combined Authority under the Equality Act 2010.

10. Crime and Disorder Implications

10.1 There are no implications for Crime and Disorder arising directly from this report.

11. Consultation/Engagement

11.1 The Proper Officer for Transport, Monitoring Officer, and Chief Finance Officer have been consulted on the proposals.

12. Other Impacts of the Proposals

12.1 The proposals comply with the principles of sound decision-making and enable the Joint Transport Committee to properly discharge its functions.

13. Appendices

13.1 None

14. Background Papers

14.1 None

15. Contact Officer

15.1 Mike Barker, Monitoring Officer (Transport), 0191 433 2100
mikebarker@gateshead.gov.uk

16. Sign Off

- The Proper Officer for Transport:
- Monitoring Officer:
- Chief Finance Officer

17. Glossary

JTC – Joint Transport Committee

NECA – North East Combined Authority

NoTCA – North of Tyne Combined Authority