



## North East Joint Transport Committee

Tuesday, 13th September, 2022 at 2.30 pm

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

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## AGENDA

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	Page No
1. <b>Apologies for Absence</b>	
2. <b>Declaration of Interests</b>	
<p>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.</p>	
3. <b>Minutes of the meeting held on 12 July 2022</b>	<b>3 - 8</b>
4. <b>Decision Notice from Tyne and Wear Sub-Committee held on 7 July 2022</b>	
<p>The meeting was inquorate and no decisions were made by the Sub-Committee.</p>	
5. <b>North East Bus Enhanced Partnership</b>	<b>9 - 126</b>
6. <b>Transport Budget 2023/24</b>	<b>127 - 138</b>
7. <b>Transport Plan Progress Report</b>	<b>139 - 148</b>
8. <b>Date of next meeting</b>	
<p>The next meeting will be held on Tuesday 18 October at 2.30pm in the Bridges Room, Gateshead Civic Centre.</p>	

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**NORTH EAST JOINT TRANSPORT COMMITTEE**

**DRAFT MINUTES FOR APPROVAL**

**DATE:** 12 JULY 2022

Meeting held: Bridges Room, Gateshead Civic Centre

**COMMITTEE MEMBERS PRESENT:**

Councillor: M Gannon (Chair)

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

**IN ATTENDANCE:**

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

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

**1. APOLOGIES FOR ABSENCE**

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

**2. DECLARATIONS OF INTEREST**

There were no declarations of interest.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

## 9. DELEGATIONS TO THE PROPER OFFICER FOR TRANSPORT

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

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

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

## 10. DATE AND TIME OF THE NEXT MEETING

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

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## North East Joint Transport Committee

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

### Executive Summary

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

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

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

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

### Recommendations

The North East Joint Transport Committee is recommended to:

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

## 1. Background Information

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

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

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

- 1.5 The DfT is currently reviewing the draft formal documentation that we have developed and that outlines how the BSIP will be delivered and makes an EP. This comprises:
- an EP Plan: the high-level vision and objectives for bus services in the local area; and
- one or more EP Scheme(s): which set out greater detail of how the visions and objectives of the BSIP will be achieved, including any commitments made by the local authorities or standards to be met by bus operators. We will only be producing one scheme which covers the whole EP area, the legislation allows to have multiple schemes which only apply to more specific geographical areas, i.e. one bus corridor.
- 1.6 Transport North East (TNE) has been working with the DfT to finalise the draft EP Plan and Scheme that were submitted at the end of June 2022. At the time of writing there are still some elements of the EP Scheme that are to be agreed with DfT to allow for funding to be confirmed and for the statutory process to start. The drafting of these points has yet to be reviewed fully by partners. Once all partners are satisfied with the proposed document the consultation process can begin. During the “operator objection” period, operators of qualifying services within the EP area can submit any objections they may have to the content of the Plan and Scheme. Following this “operator objection” period, if no objections are received or upheld, Statutory Consultation may then take place.
- 1.7 Provisional milestones:
- 23rd September 2022 – 23rd October 2022: Operator objection period
  - 31st October 2022 – 2nd January 2023: Statutory consultation period
  - 17th January 2023: Meeting of the North East Joint Transport Committee to approve the Enhanced Partnership
  - 24th January 2023: Intended commencement of the EP
- 1.8 In the event that an objection is received from an operator, which meets the criteria to be a valid objection, the JTC will need to discuss the contentious measures in the Plan and/or Scheme with the operators to resolve them by either amending them or removing them. Once the revisions have been made to the Plan and/or Scheme it will be necessary to rerun the objection period.
- 1.9 There are two criteria under which objections could cause the need for changes to the EP Scheme or Plan:

#### Criterion one

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

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

#### Criterion two

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

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

## **2. Proposals**

2.1 This report proposes that:

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

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

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

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

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

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

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

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

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

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

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

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

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

- 7.1 Failure to deliver an EP Plan and Scheme(s) will prevent the North East from accessing any new government funding for buses (both capital and revenue support). Additional government funding streams could also be affected, such as the Bus Service Operators Grant (BSOG), which will only be available for services operated or measures taken under an EP. Failing to deliver an EP has the potential to affect future, wider funding allocations for transport in the North East from the government, as they will take into account LTAs' performance with respect to the policies set out in the National Bus Strategy.
- 7.2 In its first iteration, the Scheme is assumed to be without additional cost to JTC as costs will be met from our eventual BSIP funding award, as well as underspending against that grant funding provided in the current year to establish the BSIP and EP which will be carried over in an earmarked reserve at year end. It is assumed that development work, for example that being undertaken associated with a logo to represent the new network and for website development can be met with Bus Capability Grant funding provided by the DfT for the development of the EP; and with BSIP funding once this becomes available.
- 7.3 All actions within the EP Scheme will be funded through our BSIP award, or are costs already met by Nexus, Durham County Council and Northumberland County Council.
- 7.4 As our funding award is currently indicative, in the event that this funding will not be forthcoming, to the extent that costs cannot be met from available TNE budgets, local authorities would be requested to act as funder of last resort. If required, this would be subject to a separate future report to the JTC. It should be noted that section 6.3 of the EP Scheme states that the facilities and measures are subject to funding being available and allows for these facilities and measures to be removed from the Scheme using the variation mechanism set out in section 8.6 of the EP Scheme.

## **8. Legal Implications**

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

## **9. Key Risks**

- 9.1 Failure to comply with the requirements of the National Bus Strategy would likely prompt the withdrawal of our indicative BSIP funding award. This would represent a wasted opportunity for the region and lead to uncertainty around the prospects for the bus network without investment into reform.

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

## **10. Equality and Diversity**

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

## **11. Crime and Disorder**

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

## **12. Consultation/Engagement**

- 12.1 The process for developing and implementing an EP necessitates statutory consultation with bus operators and a number of groups identified as key stakeholders. These stakeholders will be contacted directly and include neighbouring authorities, police forces, traffic commissioners and transport organisations, such as Bus Users UK and Transport Focus.
- 12.2 In the production of the BSIP, detailed consultation was undertaken with partners, stakeholders and the public, as reported to JTC on 21 September 2021. Close collaboration has also been ongoing with partners in the development of the EP Plan and Scheme. In addition, LA7 officers have been briefed on the content of this report and LA7 and Nexus lawyers have reviewed draft versions of the EP Plan and Scheme and offered comments on drafting.

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

- 13.1 None

## **14. Appendices**

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

## **15. Background Papers**

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

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

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

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

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

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

## **16. Contact Officers**

- 16.1 Philip Meikle, Transport Strategy Director  
E-mail: [philip.meikle@transportnortheast.gov.uk](mailto:philip.meikle@transportnortheast.gov.uk)



**17. Sign off**

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

**18. Glossary**

BSIP – Bus Service Improvement Plan

EP – Enhanced Partnership

JTC – Joint Transport Committee

NBS – National Bus Strategy

LTA – Local Transport Authority

LA – Local Authority

DfT – Department for Transport

BSOG – Bus Service Operators Grant

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## **TRANSPORT NORTH EAST**

### **ENHANCED PARTNERSHIP SCHEME**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

## 2. **Defined Terms**

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

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

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

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

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

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

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

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

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

### **4. COMMENCEMENT DATE**

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

### **5. EXEMPTED SERVICES**

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

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

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

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

## **6. FACILITIES AND MEASURES**

- 6.1 The Authorities named in column 3 of the table in Schedule 2 (*Facilities and Measures*) shall provide the relevant Facility or Measure described in column 2 by and from the date or dates indicated in column 5 (as applicable).
- 6.2 Where a Required TRO is specified in column 4 of the table in Schedule 2 (*Facilities and Measures*) then the Local Highway Authority (or Local Highway Authorities) for the area to which the TRO applies shall use all reasonable endeavours to make such TRO in sufficient time for the relevant Facility or Measure to be provided no later than the date or dates indicated in column 5. Where a Local Highway Authority is unable to make any required TRO in the timescale specified, then the relevant Local Highway Authority may propose a Proposed Variation which:
- 6.2.1 amends the date or dates indicated in column 5 for such Facility or Measure until a date reasonably following the actual date that the TRO is made ; and
- 6.2.2 amends the date or dates specified for implementation of any requirement that is identified in column 6 of the relevant table as being dependent upon such Facility or Measure,
- and where a Proposed Variation specifies both the amendments specified in sections 6.2.1 and 6.2.2 and provided that these are the only amendments specified, then section 8.6.9 shall apply to such Proposed Variation as if it had been discussed by the relevant Local Bus Board(s).
- 6.3 The introduction and/or delivery of the Facilities and Measures set out in this Scheme is subject to the provision of funding, which may be from the Department for Transport or any other funding body. Where an Authority is unable to introduce and/or deliver any Facility or Measure in the timescale specified (including where funding from the Department for Transport or any other funding body which is required to introduce and/or deliver such Facility or Measure has not been provided), then such Authority shall promptly notify the NEJTC, and where the

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

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

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

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

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

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

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

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

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



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

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

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

## 8. GOVERNANCE ARRANGEMENTS

### 8.1 North East Regional Bus Partnership Board

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

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

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

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

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

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

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

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

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

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

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

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

## 8.6 Arrangements for Varying or Revoking this EP Scheme

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

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

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

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

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

## **8.8 Franchising Scheme**

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

## **8.9 Funding of Network Improvements**

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

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

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

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

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

## **8.10 Complementary Arrangements**

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

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

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

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

## 8.11 Reporting of Operator Savings Derived from EP Scheme

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

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

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

## 8.12 Intention of Governance Arrangements

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

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

## 9. Competition

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



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

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



**SCHEDULE 2: FACILITIES AND MEASURES**

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

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

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

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

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

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

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



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

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

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

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

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

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

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

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



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

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

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

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

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

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

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

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



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

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

**Nexus:**

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

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

**Northumberland:**

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

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

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

**Bus stop timetable displays:**

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

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

#### Information at interchanges:

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

**Printed information on core network:**

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

## ANNEX 1: INDICATIVE CODE OF CONDUCT

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

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

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

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

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

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

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

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

## **ANNEX 2: TICKETING PRODUCTS**

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

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

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

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

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

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



**ANNEX 3: MAINTAINING EXISTING FACILITIES**

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

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

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

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

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

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

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

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

### 1.3. General

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

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## TRANSPORT NORTH EAST

### ENHANCED PARTNERSHIP SCHEME

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

## 2. Defined Terms

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

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

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

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

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

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

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

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

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

### **4. COMMENCEMENT DATE**

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

### **5. EXEMPTED SERVICES**

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

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

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

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

## **6. FACILITIES AND MEASURES**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

## 8. GOVERNANCE ARRANGEMENTS

### 8.1 North East Regional Bus Partnership Board

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

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



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

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

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

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

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

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

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

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

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

## 8.6 Arrangements for Varying or Revoking this EP Scheme

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

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

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

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

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

## **8.8 Franchising Scheme**

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

## **8.9 Funding of Network Improvements**

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

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

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

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

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

## **8.10 Complementary Arrangements**

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

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

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

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

## 8.11 Reporting of Operator Savings Derived from EP Scheme

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

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

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

## 8.12 Intention of Governance Arrangements

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

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

## 9. Competition

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

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

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





**SCHEDULE 2: FACILITIES AND MEASURES**

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

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

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

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

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

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

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

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

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



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

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

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

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

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

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

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

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



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

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

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

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

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

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

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

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

**Nexus:**

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

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

**Northumberland:**

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



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

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

**Bus stop timetable displays:**

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

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

**Information at interchanges:**

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

**Printed information on core network:**

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

## ANNEX 1: INDICATIVE CODE OF CONDUCT

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

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

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

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

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

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

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

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

## **ANNEX 2: TICKETING PRODUCTS**

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

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

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

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

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

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

**ANNEX 3: MAINTAINING EXISTING FACILITIES**

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

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



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

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

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

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

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

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

### 1.3. General

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

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## North East Joint Transport Committee

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**Date:** 13 September 2022  
**Subject:** Transport Budget 2023/24  
**Report of:** Chief Finance Officer

### Executive Summary

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

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

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

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

Based on the initial estimates, indications are that it will be necessary to increase the Tyne and Wear Transport Levy in both 2023/24 and 2024/25, as reported during the 2022/23 budget setting process. Initial forecasts suggest an increase to the levy of 4% (£2.6m) in 2023/24 and 3.75% (£2.5m) in 2024/25 will be necessary. This is in addition to Nexus using £3.1m of reserves in 2023/24 to balance its budget.

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

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

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

### **Recommendations**

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



## **1. Background Information**

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

## **2. Proposals**

### **Budget Context**

- 2.1 The 2023/24 budget preparations are taking place in the context of considerable pressure and uncertainty in the economy and on local authority finances.
- 2.2 The consumer price index (CPI) rose by 10.1% in the 12 months to July 2022 and is on course to increase further during the autumn, the highest rate for over 30 years. Inflation is creating significant budget challenges for local authorities and the JTC's delivery partners, who are faced with huge increases in energy bills and increased demand for services.
- 2.3 The Bank of England in its quarterly Money Policy Report published on 4 August 2022 forecast that inflation would rise to around 13% over the next few months, driven by higher energy prices and higher prices from goods purchased from abroad. The bank base interest rate was raised to 1.75%, with further increases anticipated in September. Other organisations have forecast even higher levels of inflation, with one US financial services group saying it expected the consumer prices index (CPI) to hit 18% in the first quarter of 2023, while the Retail Prices Index (RPI) would soar to 21%. Inflation is forecast to remain above 10% into next spring but then to fall sharply to below its 2% target by the middle of 2024.
- 2.4 Public transport usage in the region has not fully returned to pre-pandemic levels, with bus passenger numbers in July being 78% of pre-Covid levels. This has had an impact on bus operators' finances and routes across the North East have already seen major cutbacks this year. Nexus have also been impacted by reduced patronage, with Metro passenger numbers in July at 82% of 2019/20 levels.
- 2.5 Authorities in the region continue to work towards access to the City Region Sustainable Transport Settlement (CRSTS) announced as part of the 2020 UK Budget. This is a £4.2bn fund over a five year period for investment in intra-city transport to be shared between eight regions from 2022, of which the North East is one. Access to the fund is subject to the creation of appropriate governance arrangements to agree and deliver the funding, namely the formation of a Mayoral Combined Authority.

## **Timetable and consultation**

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

## **Transport North East**

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

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

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

## **Transport Levies**

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

## **Nexus**

- 2.21 The majority of the Tyne and Wear Levy (£63.125m in 2022/23, or 97% of the total levy) is paid as a grant to Nexus for the delivery of public transport services in Tyne and Wear.
- 2.22 Nexus' gross revenue budget for 2022/23 is £170.2m, with £63.1m (37%) funded from the Tyne and Wear Transport Levy. In addition, in order to underpin the revenue budget and protect services in 2022/23, it was agreed that Nexus would use reserves of £5.6m.
- 2.23 During the year to date, Nexus has seen a recovery in customers using the Metro, introduced measures to tackle anti-social behaviour on the Metro and reacted to systemic changes in the bus network by reconfiguring and growing its own secured services provision. This is all being done against a backdrop of delivering major capital investment in new trains, a new depot, other essential renewals and the construction of a new line in South Tyneside (Metro Flow).
- 2.24 However, inflation has risen significantly above the levels previously assumed and this has had a hugely detrimental effect on a range of costs making up Nexus' budget. In particular, the cost of high voltage power has more than doubled, caused by geo-political factors and continued instability in the energy market. There are other pressures relating to contract price inflation, instability in the bus market where, as the paragraph above outlines, Nexus has had to step in and preserve services which would otherwise have been lost and employee pay, where at the time of writing, negotiations for the April 2022 pay award remain ongoing.
- 2.25 Despite this, the position is considered manageable this year due to the receipt of £8.8m of additional central government support in the form of Local Transport Funding (LTF). However, further support of this nature is unlikely, therefore relative to the Medium Term Financial Plan (MTFP) presented to the JTC in January 2022, the position for 2023/24 and beyond has worsened significantly.

- 2.26 Nexus is currently refreshing budget estimates for 2023/24 and 2024/25, and preparing the forecast for 2025/26 as it refreshes its MTFP. At this point in time, it is not expected that the Tyne and Wear Transport Levy will need to increase beyond the amount which was outlined in the MTFP presented to JTC in January 2022. Forecasts suggest an increase to the levy of 4% (£2.6m) in 2023/24 and 3.75% (£2.5m) in 2024/25 will be necessary, which is in addition to Nexus using £3.1m of reserves in 2023/24 to balance its budget
- 2.27 The refreshed MTFP shows continued reliance on reserves for longer than previously anticipated, something that is only possible because of the better financial position reported in 2021/22. The adoption of such a strategy is considered prudent given the need to maintain services for as long as possible, in order to ensure Nexus emerges from the Covid pandemic in a positive way, something that the recovery plan for the Metro submitted to central government in January 2021 insisted on. Further, despite the significant financial challenges that Nexus faces, savings are expected to arise from the introduction of the new fleet, together with a reduction in the track access charge payable to Network Rail for operating on the Sunderland line, now that the debt associated with the construction of the extension is nearly fully repaid. Although Metro fare revenue is still behind pre-Covid levels, there is cautious optimism about recovery, although the position remains fragile and the cost of living crisis is something that could reverse progress in this regard.
- 2.28 It is clear that a number of risks will need to be proactively managed in order to ensure that Nexus can continue to maintain services and as paragraph 2.26 refers to, this will only be possible if the Tyne and Wear Transport Levy increases as previously indicated.

### **Tyne Tunnels**

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

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

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

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

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

4.1 This report is for information.

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

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

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

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

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

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

### **8. Legal Implications**

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

### **9. Key Risks**

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

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

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

### **11. Crime and Disorder**

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

**12. Consultation/Engagement**

12.1 The NECA Constitution (in its role as accountable body for the JTC) requires that consultation on its budget proposals be undertaken at least two months prior to the budget being agreed.

**13. Other Impact of the Proposals**

13.1 There are no other impacts arising from this report.

**14. Appendices**

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

**15. Background Papers**

15.1 JTC revenue budget report February 2022 -

**16. Contact Officers**

16.1 Eleanor Goodman, NECA Finance Manager,  
[eleanor.goodman@northeastca.gov.uk](mailto:eleanor.goodman@northeastca.gov.uk), 0191 433 3860

**17. Sign off**

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

**18. Glossary**

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

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



<b>Date</b>	<b>Meeting/Event</b>	<b>Action</b>
15 February 2023	Levy letters issued to constituent authorities	Date by which transport levies must be issued in line with the Transport Levying Bodies Regulations

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## North East Joint Transport Committee

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**Date:** 13 September 2022  
**Subject:** Transport Plan Progress Report  
**Report of:** Managing Director, Transport North East

### Executive Summary

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

Work continues to plan on the new Metro fleet with the first train on target to be delivered to the North East by the end of the year. The scheme to replace Tanners Bank Metro bridge in North Shields was successfully completed during July, helping to provide better access to the Fish Quay regeneration area.

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

Strike action has continued to affect local rail services, with no Northern Rail trains operating on 18<sup>th</sup> and 20<sup>th</sup> August.

Transport North East have contributed to a Rural Mobility Call for Evidence launched by Transport for the North, highlighting issues and challenges for those wishing to get around rural areas. This will help to inform TfN's next Strategic Transport Plan as well as the Department for Transport's work on the Future of Transport Rural Strategy.

Online and in-person consultation has been taking place between July and September on the region's draft 'Making the Right Travel Choice' strategy.

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

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

### Recommendations

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

## 1. Background Information

- 1.1 The North East Transport Plan sets out a vision of 'moving to a green, healthy, dynamic and thriving North East' through the delivery of transport improvements under seven policy areas. Recent developments in the transport field are discussed below, organised by policy area.

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

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

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

Planning continues for the 12 week line closure between Pelaw and South Shields to facilitate the Metro Flow project. The line will close in September after the Great North Run.

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

- 2.2 Bus partnership development Following the submission of the draft Enhanced Partnership (EP) Plan and Scheme to the Department for Transport (DfT) at the end of June 2022 we have received formal feedback from the DfT. We are working to address these comments with the aim to obtain agreement on the EP drafting and confirm funding award.

- 2.3 Bus services The DfT confirmed on 19<sup>th</sup> August that Bus Recovery Grant (BRG) funding would be extended for 6 months to avoid large scale service deregistrations across the country in October. For the North East this will delay some deregistrations and service changes; however, the majority of the changes to the region's bus network have already been carried out by Go North East in March and July this year. It should also be noted that this extension to funding does not cover Light Rail systems and is bus only.

As has been noted in the press DfT have been looking into the possibility of introducing a £2 capped single fare across England for a short period of time. Our understanding is that this would be in place 6 months starting in October 2022, however this has not yet been agreed so is still speculative..

- 2.4 Levelling up Fund A regional Decarbonisation-led transport bid was submitted on 4<sup>th</sup> August 2022. The bid comprises the electrification of 52 buses, together with a package of electric vehicle charging (92 chargers). We expect to hear the outcome

of this bid in Autumn 2022 and, if successful, improvements will be in place by Spring 2025.

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

- 3.1 Rail update Rail services in the region have continued to be affected by strike action, with no Northern Rail services operated on 18<sup>th</sup> and 20<sup>th</sup> August.

The latest punctuality and cancellation figures on both Northern and Transpennine services have both declined compared to the last period, and are also worse than the equivalent period last year.

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

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

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

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

- 4.1 'Making the Right Travel Choice' strategy Consultation has been taking place since July on the draft 'Making the Right Travel Choice' strategy, which encourages 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. The consultation period ends on 14<sup>th</sup> September.

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

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

- 4.4 Active Travel Fund In advance of the next round of Capability Fund and Active Travel Fund, we were required to carry out a regional self-assessment which was submitted to Active Travel England on the 26<sup>th</sup> of August. This required us to describe and evidence levels of local leadership and support, plan development, and active travel schemes delivered to date. The 2022/23 Capability and Ambition Fund is expected to launch in early September, with the fourth round of Active Travel Fund to follow.

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

The Council will receive more than £270,000 from the £12.7m total available to help promote walking and cycling and reduce reliance on the NHS. A cycle and walking scheme for older people will be set up, as well as adult cycle training and cycling taster days.

## **5. Transport Usage Trends**

- 5.1 Across the region public transport usage remains below pre-pandemic levels, with bus passenger numbers at 78% and Metro passengers at 82% of their pre-pandemic baselines. Traffic levels vary but are around the same levels as before the pandemic. Based on a selection of cycling counters in the region, for the year to date cycling numbers are 5% down from the equivalent period in 2021.

## **6. Reasons for the Proposals**

- 6.1 This report is for information purposes.

## **7. Alternative Options Available**

- 7.1 Not applicable to this report.

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

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

## **9. Potential Impact on Objectives**

- 9.1 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.

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

- 10.1 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.'
- 10.2 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.

**11. Legal Implications**

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

**12. Key Risks**

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

**13. Equality and Diversity**

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

**14. Crime and Disorder**

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

**15. Consultation/Engagement**

15.1 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.

**16. Other Impact of the Proposals**

16.1 No specific impacts.

**17. Appendices**

17.1 1 - Progress on Key Performance Indicators.

**18. Background Papers**

18.1 None.

**19 Contact Officers**

19.1 Tobyn Hughes, Managing Director, Transport North East

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

## **20. Sign off**

- 20.1
  - The Proper Officer for Transport:
  - Head of Paid Service:
  - Monitoring Officer:
  - Chief Finance Officer:

## **21. Glossary**

- 21.1 All abbreviations or acronyms are spelled out in the report.



## Appendix 1

### Progress on Key Performance Indicators

<u>KPI</u>	<u>Direction of travel</u>	<u>Key insight</u>
<p><u>Sustainable Travel</u></p> <p>33% of journeys made by public transport, walking and cycling.</p> <p>Data Source: DfT National Travel Survey 2019, published August 2020.</p>	Increase	<p>Data in the National Travel Survey for 2020 shows that 37% of journeys are made by public transport, walking and cycling, which is an increase on the previous year.</p> <p>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 24<sup>th</sup> July Metro was at 81% of typical journey numbers, and for the 7 days commencing 24<sup>th</sup> July bus was at 74%.</p>
<p><u>Public transport accessibility</u></p> <p>45% People within 25 minutes of key employment, education and retail sites by public transport.</p> <p>Data source: Commissioned analysis August 2020</p>	No Change	Data is not yet available to update, however, there have been no major changes to infrastructure.
<p><u>Climate action</u></p> <p>CO2 emissions per capita: 1.7 tonnes CO2 emitted per person annually using transport.</p> <p>Data source: UK local authority and regional CO2 emissions statistics: 2019, Department for Business,</p>	No Change	Figures for 2019 have been released and show no change in the amount of transport related CO2 emissions.

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<p><u>Take up of ultra-low emission vehicles (ULEVs)</u></p> <p>0.34% Proportion of licenced vehicles in our region that are classed as ultra-low emission (end of 2019)</p> <p>Data source: Department for Transport vehicle licensing statistics</p>	Increase	<p>0.8% of licenced vehicles in the region are classed as ultra-low emission (Q3 2021).</p> <p>The number of ULEVs registered in the North East increased to 8,923 at the end of Q3 2021.</p>
<p><u>Air quality</u></p> <p>For 2019, the highest, median, hourly nitrogen dioxide reading was 26.9ug/m<sup>3</sup> occurring in the morning traffic peak.</p> <p>Data source: Department for Environment Food &amp; Rural Affairs Automatic Urban and Rural Network (AURN)</p>	Decrease	<p>For 2021, the highest, median, hourly nitrogen dioxide reading was 25.5ug/m<sup>3</sup> occurring in the morning traffic peak. This is an increase on 2020, however 2020 was expected to be unusually low. 25.5ug/m<sup>3</sup> 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>	No Change	Data is not yet available to update
<p><u>Motor vehicle traffic</u></p> <p>Estimated vehicle miles per head in our region in 2019 5,077</p>	Decrease	<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</p>

Data source: Department for Transport National Travel survey, published August 2020		result of the COVID-19 pandemic.
<u>Road safety: numbers killed and seriously injured</u>  Numbers killed and seriously injured (KSI) three year rolling average (2016-17 to 2018-19) 778  Data source: Traffic Accident Data Unit	Decrease	In the three-year rolling average from 2018 to 2021 there were 683 KSI.  It is important to note that lower traffic volumes in 2020 and 2021 are likely to have contributed to the observed reduction in KSIs.
<u>Road safety: number of slight injuries</u>  Number of slight injuries three year rolling average (2016-17 to 2018-19) 3,275  Data source: Traffic Accident Data Unit	Decrease	The three-year rolling average from 2018 to 2021 was 2,519 slight injuries.  It is important to note that lower traffic volumes in 2020 and 2021 are likely to have contributed to the observed reduction in KSIs.

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