

Report to: **Partnership Board –Transport for the South East**

Date of meeting: **13 May 2024**

By: **Chief Officer, Transport for the South East**

Title of report: **Transport Strategy Refresh Update**

Purpose of report: **To provide an update on progress with the refresh of the transport strategy, and to share with the Partnership Board key ideas on the scenarios work and the structure of the strategy**

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***RECOMMENDATIONS:***

The members of the Partnership Board are recommended to:

- (1) note the progress with the work to refresh the transport strategy;**
- (2) note the outcomes of an initial scenario planning workshop that identified key drivers of change that will affect how the future could unfold;**
- (3) agree that the strategy should be structured around addressing a number of ‘Big Missions.’**

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**1. Introduction**

1.1 At the July 2023 meeting, the Partnership Board agreed that a refresh of Transport for the South East’s (TfSE) transport strategy should be undertaken. The timeline for the refresh is shown in Appendix 1. The purpose of this report is to provide an update on the work that has taken place since the previous update to the Board in January 2024 and the work that is due to take place before the next Board meeting in July 2024.

1.2 The report shares some initial findings from the scenario planning work currently taking place with key stakeholders, as well as a proposed structure for the strategy.

**2. Progress with technical work**

2.1 Since January 2024 there has been significant progress with the technical work to develop the strategy. This has primarily involved a review of the existing evidence base that underpinned the current transport strategy and the Strategic Investment Plan, as well as collecting new evidence. This will be summarised in a ‘Need for Intervention Report’ that will also set out a series of challenge statements that the transport strategy will seek to address.

2.2 Some of the data that has been collected has fed into, and in turn been influenced by, a series of Working Groups that have been set up to provide input into the strategy development. There are four Working Groups made up of a variety of technical specialists. The Working Groups are focussed on identifying the key questions that need to be posed to realise a number of the key outcomes that the strategy is seeking to achieve. The four Working Groups are as follows:

- Realising economic opportunities;
- Delivering a just transition to net zero emissions;
- Planning for healthy and connected places;
- Embracing the future.

2.3 The first two rounds of Working Groups were held in January and February 2024. The first round was focussed on identifying key pieces of evidence that are of relevance to achieving each of the key outcomes. The second round focussed on developing a number of challenge statements to further guide evidence collection. A third round of meetings will take place during the strategy development stage to review the emerging content.

2.4 Another area of focus has been the delivery specific piece of work to engage with socially excluded groups across to identify key components of a socially inclusive transport strategy. This has involved reviewing the existing evidence in relation to socially excluded groups including census data, data on the indices of multiple deprivation for the south east and data from Transport for the North's work on Transport-related Social Exclusion.

2.5 Four workshop sessions have been run with 30 participants from various socially excluded groups including people with disabilities, neurodivergence, and asylum seekers. The workshop sessions have focussed on identifying the challenges facing persons who are socially excluded and the co-creation policies that could be part of an inclusive transport strategy.

2.6 Some key initial key insights that have been identified from this work on social exclusion include the following:

- high concentrations of transport-related social exclusion occur in coastal areas (e.g. Hastings and Thanet), reflecting their relatively poor accessibility by public transport to key services and high concentrations of socially excluded groups in these areas;
- the complex nature of transport-related social exclusion, reflecting not just issues with the transport system and its operations and wider social challenges;
- there are significant evidence gaps when it comes to specific aspects of exclusion, notably neurodiversity and on how various aspects of exclusion often interface with each other to reinforce social exclusion.

### **3. Update on engagement activity**

3.1 As set out in the report to the Partnership Board on the Transport Strategy refresh in July 2023, the approach to engagement during its development will be

based on the principles of 'co-creation'. This involves working openly and collaboratively with stakeholders, subject matter experts and other interested parties to help develop the evidence base and priorities for the strategy.

3.2 The last three months has seen the commencement of this engagement work. One-to-one meetings have been held with local transport authorities, Transport for London, Network Rail, and National Highways to discuss areas of potential alignment with existing and future strategies, as well as current and future challenges.

3.3 TfSE has also commenced a more public-facing engagement campaign called 'Your Voices.' The aim of this is to engage with the wider public across the TfSE area. A survey that is currently running as part of this campaign aims to encourage members of the public to help us understand how much the relative importance of the priorities that the strategy should seek to address and how these priorities have changed in importance since 2020. This survey can be viewed at this link: [Survey Details | Transport for the South East Your Voices \(engage-360.co.uk\)](https://engage-360.co.uk). A total of 150 responses were received during the first week of the survey that was launched in April 2024. The survey closes in early June and following this further 'Your Voices' surveys will be undertaken on other aspects of the developing strategy.

#### **4. Scenario planning for the transport strategy**

4.1 Work is currently taking place to refresh the future scenarios that were developed for the existing transport strategy. The purpose of this exercise is to identify a number of different plausible and possible futures against which a 2050 Vision and strategic priorities can be tested. This is particularly important as some of the assumptions that underpinned the scenarios that were developed for the current transport strategy have changed.

4.2 We are currently undertaking a series of workshops with local transport authority officers and other key stakeholders to refresh these scenarios. The first workshop took place on 25 April 2024 and was focussed on identify a number of drivers of change, these being the key things that are likely to affect the future of transport across the TfSE area.

4.3 The drivers of change are the key building blocks of the future scenarios, and consequently, developing consensus on what these drivers are, and their relative importance is an important part of the process.

4.4 The drivers of change identified at the first workshop and the process for developing them are set out in Appendix 2. Members of the Partnership Board are recommended to note the outputs from the workshop set out in Appendix 2.

4.5 The project team is keen for the Partnership Board to be as engaged in the scenario planning process as it will be used to refine the 2050 Vision and strategic priorities for the strategy. Two workshops for Partnership Board members are planned to take place ahead of the next Partnership Board meeting in July 2024.

## 5. Options for structuring the transport strategy

5.1 Whilst the content of the transport strategy will continue to be shaped by ongoing work over the coming months, the project team has been giving consideration as to how the main part of the strategy should be structured. Several options have been considered which are summarised below:

- Option 1 - Movement based framework - strategy is structured by movement type (e.g. strategic, long-distance, inter-urban and local), interweaving other themes to sit under each movement type (e.g. accessibility to services under local movements)
- Option 2 - Modal framework - structured by mode (highway, railway, Mass Rapid Transit/bus, active travel modes), interweaving other themes to sit under each mode (e.g. public health under active travel)
- Option 3 - Place based framework – structured by place typology (e.g. urban, rural, coastal, London-periphery), interweaving other themes to sit under each typology (e.g. active travel and its public health benefits under urban)
- Option 4 - Movement and place-based framework - structured by place and movement types (e.g. connected neighbourhoods, getting into and out of our towns and cities, interurban links, travel to and from the region, international connectivity)
- Option 5 - People and goods-based framework – structured by different user groups (e.g. commuters, leisure travelers, freight operators)
- Option 6 - Thematic framework - structured by objectives / outcomes / priorities which are applicable across places and movement types (e.g. decarbonisation, social inclusion, delivering sustainable economic growth)
- Option 7 - 'Big Missions' Framework - structured around a set of key topics – including modal, thematic, and delivery-focussed (e.g. decarbonisation, accessibility, housing, gateways, resilience, funding) which have a single, coherent narrative and set of objectives addressed by a range of interventions for different place and movement types.

5.2 The advantages and disadvantages of each of these options are set out in Appendix 3. Based on the information set out in Appendix 3, Option 7 – 'Big Missions' has been identified as the recommended option as it will focus on the issues on which TfSE could have a role in helping to deliver and incorporate a place-based framework to identify how these big missions would be addressed spatially across the TfSE area.

5.3 The potential opportunities and challenges with this approach are set out in the table below. The main opportunity this approach presents is the ability to develop an action-focussed strategy that can be applied to different movement and place types and identify policy packages that work towards a specified end goal. (e.g. achieving net-zero carbon emissions). It also offers the opportunity to closely align policies at a national and local level to achieve common goals.

<b>Potential opportunities of a Big Mission approach to the transport strategy</b>	<b>Potential challenges of a Big Mission approach to the transport strategy</b>
<ul style="list-style-type: none"> <li>• It makes the strategy action-orientated, requiring the setting out what needs to be achieved and by when to achieve a defined outcome;</li> <li>• It potentially provides a compelling strategic narrative to that is appealing to Government and private investors for schemes and initiatives;</li> <li>• It provides a “call to action” against which other stakeholders can align their policies and delivery plans;</li> <li>• The ‘Big Missions’ approach challenges traditional siloed thinking focussed on modes and networks and promotes the need for a multimodal approach.</li> </ul>	<ul style="list-style-type: none"> <li>• Defining and shortlisting the Big Missions that the strategy will seek to address;</li> <li>• Addressing the big Mission may require input from sectors outside TfSE’s control (e.g. energy, digital and land use planning).</li> <li>• The strategy document may not have the look and feel of what is expected of a traditional transport strategy that is focussed on modes and networks.</li> <li>• Potential changes in national policy direction resulting in one or more of the ‘Big Missions’ being ‘out of sync’ with these policy shifts.</li> </ul>

5.4 A key element of the technical work going forward will be to identify and shortlist what these ‘big missions’ should be. They will be informed by analysis the evidence base for the transport strategy, the outcomes of the scenario planning work, and continued engagement with stakeholders. An update on the work to identify and shortlist the Big Missions will be brought to the Partnership Board in July 2024.

5.5 Members of the Partnership Board are recommended to agree that Option 7 should provide the basis for structuring the main part of the transport strategy document.

## 6. Financial considerations

6.1 As reported to the Board in January 2024, the total cost of the transport strategy refresh is forecast at £724,000. This cost will be met from the Department of Transport grant allocations for 2023/24 and 2024/25.

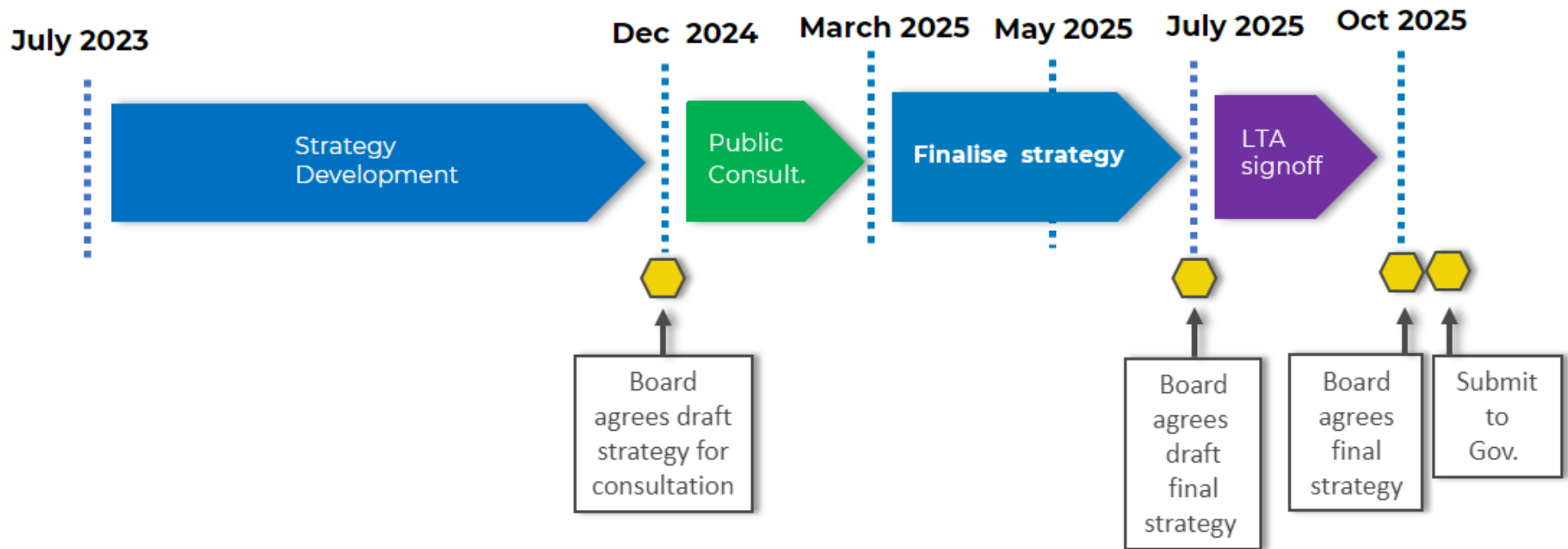
## 7. Conclusions and recommendations

7.1 In conclusion, work on the transport strategy refresh is progressing well, with significant progress on a number of elements of technical work and on consultation and engagement activity. Members of the Partnership Board are recommended to note the progress on the transport strategy refresh and note to work that has taken place to identify key drivers of change as part of a scenario planning process. They are also recommended to agree that an approach to structuring the strategy document based on addressing a number of ‘Big Missions’ should be adopted.

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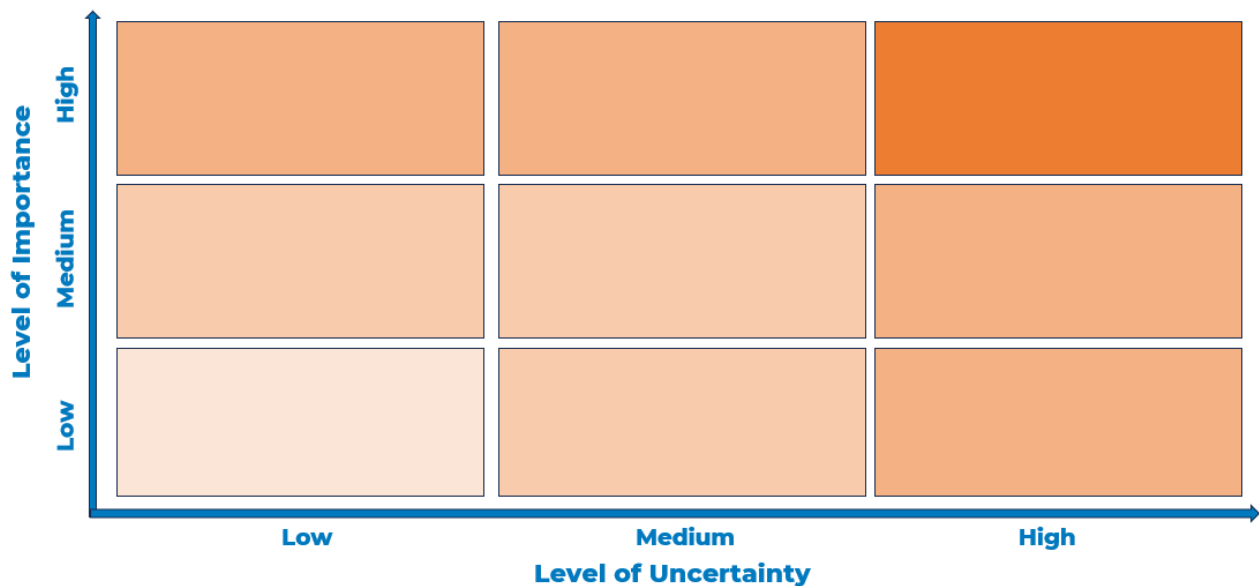
## Appendix 1 – Timeline for delivery of the transport strategy refresh



## Appendix 2 – Identifying drivers of change

1. The purpose of this Appendix is to describe the process that was used to identify key drivers of change that are likely to affect how the future could unfold. These drivers of change will provide the basis for developing a number of different future scenarios that will then be used to test a 2050 Vision and strategic priorities for the strategy.
2. A workshop to identify the drivers of change took place on 25 April 2024 and was attended by local transport authority officers and other key stakeholders.
3. The identification of key drivers of change involved a discussion about a range of external factors (driver of change), broadly out of the control of TfSE (e.g. demographic change, economic shocks, level of government spending, attitudes to the environment) to identify which are the most important and about which there is high uncertainty in terms of their impact on transport system in the future.
4. Workshop participants were presented with the 3X3 matrix shown in the figure below showing low, medium and high importance and low, medium and high uncertainty. They were asked to identify in which box each driver of change should be placed.
5. A total of thirty drivers of change were prepared for consideration and a further fifteen were added by participants. Drivers of change were grouped under the following themes:
  - Policy drivers
  - Economic driver
  - Social driver (changes in attitudes)
  - Technology drivers
  - Legal and regulatory drivers
  - Environment and energy drivers

Figure 1 Driver mapping matrix





6. The output of this exercise was a list of the drivers of change that were identified as being the most important influences in the future and about which there was the highest level of uncertainty. These most important and uncertain driver are set out in the table below.

*Most important and uncertain drivers of change*

<b>Driver of change</b>	<b>Driver description</b>
<b>Level of national government spending</b>	Level of public expenditure available overall, and the allocation given to infrastructure, transport, local/regional authorities
<b>Level of local government spending</b>	Level of public expenditure available at a local level, and the allocation given to infrastructure, transport, local/regional authorities
<b>Transport policy focus (sustainable transport)</b>	Extent to which transport policy supports greater investment in sustainable transport.
<b>Transport policy focus (highways)</b>	Extent to which transport policy supports greater investment in highways.
<b>Environmental policy focus</b>	Extent to which government focusses on decarbonisation, biodiversity, habitats and protection of historical and natural assets
<b>Interest rates / inflation</b>	How interest rates and inflation fluctuate
<b>International trade</b>	Degree of change in globalisation or isolationism, such as the impacts of more or less trading with EU and other trading partners
<b>Labour and skills shortage</b>	Extent to which there is changing labour or skills shortage more generally or in specific sectors, which leads to changing travel patterns
<b>Economic shocks</b>	Degree of economic stability nationally and regionally (e.g. changing impact due to trade wars and conflicts)
<b>Industrial make-up</b>	Extent to which the industrial make up changes, either due to a strategic effort to encourage economic transformation, or organic change
<b>Regulation and competition</b>	The extent to which regulation and competition play a role in the supply of and demand for transport
<b>Energy/fuel pricing</b>	Extent to which energy costs changes
<b>Energy resilience and distribution</b>	The extent to which the energy distribution networks accommodate changing demand
<b>Road user charging</b>	Extent to which forms of payment for using highways change including distance or tax-based pricing
<b>Public transport pricing</b>	Extent to which fare levels and forms of payment for consuming public transport modes change

7. In a second activity participants discussed in further detail the range of different outcomes that could play out related to the fifteen most important and uncertain drivers of change. The outputs of these discussions will be used to formulate alternative scenarios for further refinement by participants in the second scenario planning workshop that will take place at the end of May 2024. These scenarios will then be further refined at a third workshop in June 2024.



## Appendix 3 – Options for structuring the Transport Strategy

Option 1 – Movement based framework	Option 2 – Modal framework
<p>Strategy is structured by movement type (e.g. strategic, long-distance, inter-urban and local), interweaving other themes to sit under each movement type (e.g. public health under local movements)</p> <p><b>Advantages:</b></p> <ul style="list-style-type: none"> <li>Keeps focus on enhancing connectivity where it is needed, for whom it is needed</li> <li>Easy to map interventions against</li> </ul> <p><b>Disadvantages:</b></p> <ul style="list-style-type: none"> <li>Not optimised for considering needs of different geographic areas or communities</li> <li>Less focussed on presenting overarching themes such as accessibility and env't impact</li> </ul>	<p>Strategy is structured by mode (highway, railway, MRT/bus, active modes), interweaving other themes to sit under each mode (e.g. public health under active travel)</p> <p><b>Advantages:</b></p> <ul style="list-style-type: none"> <li>Very applicable to existing transport planning and funding landscape</li> <li>Keeps focus on enhancing connectivity where it is needed</li> <li>Easy to map interventions against</li> </ul> <p><b>Disadvantages:</b></p> <ul style="list-style-type: none"> <li>May lead to a strategy being more reactive to where provision is an issue (less forward-thinking)</li> <li>May lead to siloed thinking, less focus on integration</li> <li>Less focussed on presenting overarching themes</li> </ul>
Option 3 – Place-based framework	Option 4 – Movement and place-based framework
<p>Strategy is structured by place typology (e.g. urban, rural, coastal, London-periphery), interweaving other themes to sit under each typology (e.g. active travel and its public health benefits under urban)</p> <p><b>Advantages:</b></p> <ul style="list-style-type: none"> <li>Acknowledges how varied the TfSE area is, and how different places have different connectivity needs and areas react differently to transport and other factors</li> </ul> <p><b>Disadvantages:</b></p> <ul style="list-style-type: none"> <li>Risks missing the big strategic transport questions</li> <li>Could result in fragmented approaches to different areas</li> <li>Under a typology approach, may still not capture nuances and diverse needs of different places within the region.</li> </ul>	<p>Strategy is structured by place and movement types (e.g. connected neighbourhoods, getting into and out of our towns and cities, interurban links, travel to and from the region, international connectivity)</p> <p><b>Advantages:</b></p> <ul style="list-style-type: none"> <li>Combines benefits of movement and place-based frameworks, recognising their interconnectedness</li> <li>Allows consideration of both the different needs of different types of places, but also longer distance or more strategic transport</li> </ul> <p><b>Disadvantages:</b></p> <ul style="list-style-type: none"> <li>May introduce complexity in how we present priorities, may require careful coordination and collaboration among stakeholders</li> </ul>

## Option 5 – People and goods based framework

Strategy is structured by different user groups (e.g. commuters, leisure travelers, freight operators)

### Advantages:

- Ensures that proposed interventions are relevant and effective at supporting user needs

### Disadvantages:

- Could result in competing priorities and trade-offs between different user groups
- Users may have varying priorities amongst themselves

## Option 6 - Thematic framework

Strategy is structured by objectives / outcomes / priorities which are applicable across places and movement types (e.g. decarbonisation, social inclusion, delivering sustainable economic growth)

### Advantages:

- Promotes holistic and integrated approach
- Helps prioritising interventions based on contribution to outcomes (not outputs)

### Disadvantages:

- May lead to siloed thinking, less focus on integration
- May lack specificity to local issues or modal specific issues, specific for the TfSE area

## Option 7 – Big Missions framework

Strategy is structured around a set of key topics – including modal, thematic, and delivery-focussed (e.g. decarbonisation, accessibility, housing, gateways, resilience, funding) which have a single, coherent narrative and set of objectives addressed by a range of interventions in different place and movement types

### Advantages:

- Makes the strategy action oriented – what are the things that need to happen to achieve transport and wider objectives
- Incorporates movement and place-based approach to determine how these big missions would be addressed spatially across the TfSE area
- **Disadvantages:**
- May extend beyond TfSE's remit
- May not cover all themes expected in a traditional transport strategy to the extent some key stakeholders may expect

**RECOMMENDED OPTION**