Transport for the South East
Partnership Board Meeting

Agenda

Monday 27 January 2024, 14:00-17:00

ICE, One Great George Street, London

Partnership Board Members		
Cllr Keith Glazier (Chair) Leader East Sussex County Council	Cllr Simon Curry (Deputy Chair) Cabinet Member, Climate Change and Strategic Regeneration Medway Council	Cllr Trevor Muten Cabinet member for Transport, Parking and Public Realm Brighton & Hove City Council
Cllr Phil Jordan Leader Isle of Wight Council	Cllr David Robey Deputy Cabinet Member for Highways and Transportation Kent County Council	Cllr Lulu Bowerman Executive Member for Highways and Waste Hampshire County Council
Cllr Peter Candlish Cabinet Member for Transportation Portsmouth City Council	Cllr Matt Furniss Cabinet Member for Transport and Infrastructure Surrey County Council	Geoff French CBE Chair Transport Forum
Daniel Ruiz Business Representative (Business Advisory Group co-chair)	Vince Lucas Business Representative (Business Advisory Group co-chair)	Cllr Sophie Cox Leader Worthing Borough Council (jointly representing District and Borough Councils)
Cllr Matt Boughton Leader Tonbridge & Malling Borough Council (jointly representing District and Borough Councils)	Tim Burr Deputy Chair South Downs National Park Authority (Representative from Protected Landscapes)	Stuart Kistruck Network Rail (on behalf of Ellie Burrows)
Richard Leonard Network Planning Director National Highways (on behalf of Richard Leonard)	Gary Nolan Strategic Engagement Lead Transport for London	

Apologies:
Cllr Joy Dennis, West Sussex
Cllr Eamonn Keogh, Southampton
Ellie Burrows, Network Rail

	Item	Who
1	**Welcome and Apologies**	Cllr Keith Glazier
2	**Minutes from last meeting** ***(p5-9)***	Cllr Keith Glazier
3	**Declarations of interest**	Cllr Keith Glazier
4	**Statements from the public**	Cllr Keith Glazier
	For Decision	
5	**Next Steps for Transport for the South East** ***(p10-12)***	Rupert Clubb
6	**Business Plan 2025/26** ***(p13-59)***	Keir Wilkins
7	**Technical Call off Contract** ***(p60-63)***	Sarah Valentine
8	**Electric Vehicle Charging Infrastructure Workstream – Vehicle Fleet Forecasting Activity** ***(p64-105)***	Mark Valleley
9	**Report of the Audit and Governance Committee** ***(p106-112)***	Cllr Joy Dennis
10	**Finance Update** ***(p113-115)***	Keir Wilkins
11	**Responses to Consultations** ***(p116-129)***	Rupert Clubb
	For Information	
12	**Transport Strategy** ***(p130-133)***	Mark Valleley
13	**Business Advisory Group** ***(p134-135)***	Daniel Ruiz / Vince Lucas
14	**Advisory Panel and Transport Forum** ***(p136-137)***	Geoff French
15	**Delivery of the Strategic Investment Plan** ***(p138-144)***	Sarah Valentine
16	**Technical Programme** ***(p145-153)***	Mark Valleley
17	**Communications and Stakeholder engagement** ***(p154-156)***	James Boyes
18	**AOB**	Cllr Keith Glazier
19	**Date of Next Meeting** Monday 17th March, 2pm, Venue TBC	Cllr Keith Glazier

Officers in Attendance

Rupert Clubb	Transport for the South East
Sarah Valentine	Transport for the South East
Keir Wilkins	Transport for the South East
Mark Valleley	Transport for the South East
Jessica Lelliott	Transport for the South East
Alexander Baldwin-Smith	Transport for London
Antoinette Antoine	Surrey County Council
David Stempfer	Surrey County Council
Matthew Furniss	Surrey County Council
Chris Maddocks	Reading Borough Council
Felicity Tidbury	Portsmouth City Council
Hayley Chivers	Portsmouth City Council
Natalie Wigman	Hampshire County Council
Joe Ratcliffe	Kent County Council
Peter Duggan	DfT
Colin Rowland	Isle of Wight Council
Michelle Love	Isle of Wight Council
Stewart Chandler	Isle of Wight Council
Mark Prior	Brighton and Hove City Council
Bartholomew Wren	Tonbridge & Malling Council
Stuart Kistruck	Network Rail
Matt Davey	West Sussex County Council
Alex Pringle	SDNPA
Thomas Cornwell	National Highways

TfSE Partnership Board
9 December 2024 10:00-13:00
Minutes - *draft*
Virtual

Partnership Board Members

Cllr Keith Glazier (Chair) Leader East Sussex County Council	Cllr Simon Curry (Vice Chair) Cabinet Member for Climate Change and Strategic Regeneration Medway Council	Cllr Trevor Muten Cabinet member for Transport, Parking and Public Realm Brighton & Hove City Council
Cllr Phil Jordan Leader Isle of Wight Council	Cllr David Robey Deputy Cabinet Member for Highways and Transportation Kent County Council	Cllr Lulu Bowerman Executive Member for Highways and Waste Hampshire County Council
Cllr Peter Candlish Cabinet Member for Transportation Portsmouth City Council	Cllr Matt Furniss Cabinet Member for Transport and Infrastructure Surrey County Council	Cllr Joy Dennis Cabinet Member for Highways and Transport West Sussex County Council
Cllr John Ennis Lead Councillor for Climate Strategy and Transport Reading Council *(representing BLTB)*	Geoff French CBE Chair Transport Forum	Daniel Ruiz Business Representative
Cllr Matt Boughton Leader Tonbridge & Malling Borough Council *(jointly representing District and Borough Councils)*	Cllr Sophie Cox Leader Worthing Borough Council *(jointly representing District and Borough Councils)*	Tim Burr Deputy Chair South Downs National Park Authority *(Representative from Protected Landscapes)*
Richard Leonard Network Planning Director National Highways		

Apologies:

- Vince Lucas
- Ellie Burrows

Officers attended:

- Rupert Clubb, Transport for the South East
- Sarah Valentine, Transport for the South East

- Keir Wilkins, Transport for the South East
- Mark Valleley, Transport for the South East
- Jessica Lelliott, Transport for the South East
- James Gleave, Transport for the South East

- Steven Bishop, Steer
- John Collins, ARUP

- Dan Taylor, DfT
- Peter Duggan, DfT

- Andrew Renaut, Brighton
- Bartholomew Wren, Tonbridge & Malling
- Adam Bryan, Medway
- Darryl Hemmings, West Sussex
- Joseph Ratcliffe, Kent
- Chris Maddocks, Reading
- Thomas Cornwell, National Highways

Item	Action
1. Welcome and Apologies	
1.1 Councillor Keith Glazier (KG) welcomed Members to the meeting and noted apologies. 1.2 KG shared the sad loss of Councillor Paul Fishwick, noting his contribution to Transport for the South East. 1.3 KG welcomed Councillor John Ennis as the new representative of the Berkshire Local Transport Body. 1.4 Apologies were noted from Vince Lucas and Ellie Burrows.	
2. Minutes from last meeting	
2.1 The minutes of the previous meeting were agreed.	
3. Declarations of Interest	
3.1 Cllr Glazier asked Board Members to declare any interests they may have in relation to the agenda. No interests were declared.	
4. Statements from the public	
4.1 Cllr Glazier confirmed that no statements from the public have been made.	
5. Business Plan 2025/26	

5.1 Keir Wilkins (KW) provided an overview of the progress to date with the Business Plan. Following the Board's request a business plan workshop took place in September to shape the funding scenarios which the Department for Transport (DfT) requested. The funding scenarios were agreed at the October board meeting. 5.2 DfT have advised we can submit Business Plan at the end of January to include work programme and subsequent outcomes. The Audit and Governance Committee agreed it was appropriate to seek final Board agreement at the January meeting before submission to the DfT. 5.3 The Board agreed this approach. 5.4 The recommendations were **agreed** by the Partnership Board. RECOMMENDATIONS: The members of the Partnership Board are recommended to: (1) Note developments on Transport for the South East's business planning for 2025/26; and (2) Agree that Transport for the South East bring a Business Plan to January's Board, in advance of submission the Department for Transport.	
6. Transport Strategy Refresh	
6.1 Mark Valleley (MV) set out the recommendation to the Board seeking agreement to take the Transport Strategy and draft Integrated Sustainability Appraisal out for consultation. 6.2 MV shared a presentation on the Transport Strategy Refresh covering the following points: • Rationale for the Refresh. • Extensive engagement that has been undertaken to date. • The relationship with other strategies and plans. • The Integrated Sustainability Appraisal was produced alongside the strategy. • Five missions: Strategic Connectivity, Resilience, Integration and Inclusion, Decarbonisation and Sustainable Growth. Each mission has a mission statement, success criteria, route map and map with key priorities. • The approach to delivery and the roles and responsibilities. 6.3 MV set out the public consultation next steps – the public consultation will commence on 10 December and run for 12 weeks until 7 March 2025. A launch webinar will take place on 10 December. Strategy Roadshows will take place across the region, Strategic Surgeries will also be held. A consultation report will be produced, identifying any potential changes. The draft final strategy will be presented to the Board July 2025, with the final Strategy to be agreed by October 2025 ahead of submission to the Government. 6.4 Board Members raised the following points: • Thanked MV and the team for the informative presentation.	

• The Board considered the draft is a comprehensive Transport Strategy • Members sought clarity on relative priorities of the different missions. MV confirmed the missions are not in a priority order and have equal weight. • In relation to decarbonisation targets MV explained different authorities have different timelines and therefore the Strategy aligns with the national target. • Cllr Cox sought explanation on the Sussex Coast Mass Transit (SCMT) and the A27 not being on the map. MV explained that the detail about the SCMT is set out within our Strategic Investment Plan and will write to Cllr Cox with further information following the meeting. MV also explained that the A27 is a vital east-west link and we will continue to make the case for the investment needed to address the bottlenecks along the route. • Rupert Clubb (RC) noted the Integrated National Transport Strategy (INTS) announcement, reasonable assumption principles behind this will continue. • MV explained in the delivery section of the strategy we have emphasised the need to work collaboratively with National Highways and Network Rail. RC noted the degree of uncertainty at present for Local Authorities, notably the awaited Devolution White Paper. • In response to questions about public transport usage MV discussed the inclusion and integration mission and the DfT ambition on the future role of buses. • Noted the underlying strategy is to protect and enhance the South East's unique natural and historic environment and improving opportunities for everyone. 6.5 Dan Taylor (DT) provided an update on the INTS with the recent change in the Secretary of State. The working assumption being that the INTS remains unchanged following the appointment of the new Secretary of State. Councillor Keith Glazier attended the recent launch event. The same Government missions remain along with the previously identified 5 priorities for the Department for Transport. 6.6 The recommendations were **agreed** by the Partnership Board. *RECOMMENDATION:* The members of the Partnership Board are recommended to agree the draft Transport Strategy and draft Integrated Sustainability Appraisal (ISA) be approved for public consultation.	
7. Chief Officer's Report	
7.1 RC provided an overview of the paper noting that the Business Planning process has already been discussed. In terms of budget we understand that the DfT have received a roll over in funding from a previous year. The DfT team will give early insight as soon as they can. TfSE will be considering input through the DfT into the spending review.	

7.2 RC attended the Transport Select Committee to provide an insight into the work of STBs and pressures across the sector. 7.3 The recommendation was **agreed** by the Partnership Board. RECOMMENDATION: The members of the Partnership Board are recommended to note the recent activities of Transport for the South East.	
8. AOB	
No matters were raised.	
9. Date of Next Meeting	
9.1 KG – thanked all for attending and asked if anyone has any comments or questions to please contact the team to ensure we as an STB get the best for the South East. 9.2 KG confirmed that the next meeting will take place on Monday 27th January 2pm-5pm, face to face at The Institute of Civil Engineers, One Great George Street, London.	

Agenda item 5

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

Date of meeting: **28 October 2024**

By: **Chief Officer**

Title of report: **Next Steps for Transport for the South East**

Purpose of report: **To review the responses Transport for the South East has received on its next steps consultation.**

RECOMMENDATION:

The members of the Partnership Board are recommended to note the responses Transport for the South East has received on its next steps consultation and note the opportunity to consider next steps at the March partnership board meeting.

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1. Overview

1.1 Following a request from Partnership Board, Transport for the South East (TfSE) consulted with local authorities and other key stakeholders on the next steps we should take as an organisation, following the General Election.

2. Background

2.1 Members asked TfSE to develop options for next steps for TfSE following the General Election. The change of government, programme of legislative reform (including, for example the creation of Great British Railways) and potential new devolution arrangements provides a timely opportunity to consider how TfSE as sub-national transport body (STB) can most effectively deliver the transport strategy on behalf of the Board.

2.2 Up to this point, TfSE has been operating as a voluntary partnership with an agreed constitution and inter authority agreement to underpin its activities. In establishing ourselves as a voluntary partnership, TfSE have replicated the principles set out in Cities and Local Devolution Act 2016, which amends the Transport Act 2008, providing the framework for STBs to be established. We deliver the same core functions of an STB that are set out in legislation, and we have the same constitutional arrangements of a statutory STB, with democratic accountability delivered through our Partnership Board.

2.3 Broadly, there are two options that TfSE could take as next steps as an organisation. We could continue to act as a voluntary partnership or ask the Department for Transport (DfT) to provide powers and functions set out in the Cities and Local

Devolution act, in certain agreed policy areas, to enable us to deliver more on behalf of our local authorities.

2.4 In October, the Board asked TfSE to consult with local authorities and other key stakeholders on whether TfSE devolved powers would help them to achieve their objectives.

3. Consultation Responses

3.1 In total 13 responses were received, 7 through the online survey platform and 6 via email. Responses were received from the following organisations:

- Isle of Wight Council
- Surrey County Council
- Kent County Council
- West Sussex County Council
- Southampton City Council, Portsmouth City Council, Hampshire County Council and Isle of Wight Council (combined response)
- Network Rail
- National Highways
- New Forest District Council
- Wealden District Council
- Shoreham Port
- Wightlink
- Community Transport Association
- England's Economic Heartland

3.2 At the same time as the consultation, TfSE's Chair had a number of meetings with local authority leaders in our region. The feedback from these meetings and consultation responses was that local authorities are supportive of the work that TfSE does to support delivery. Many local authority leaders cited examples of TfSE moving forward investment in transport in their area and helping them to work on significant issues that their area faces.

3.3 Local authority leaders that responded were open to supporting TfSE having the general powers as a sub-national transport body, alongside powers on roads, railways, and funding and finance, but said that they needed to see the English Devolution White Paper before agreeing to this. There was consistent feedback that TfSE should not duplicate any powers that local authorities may seek as combined authorities, and that TfSE should always work at a regional level, focusing on issues which cross local authority boundaries.

3.4 Many authorities noted that it was difficult to response given their emerging plans to explore devolution deals and the transition to GB Rail. This applies to Surrey, Solent (combined response), Kent and West Sussex. Of those respondents who completed the survey views were relatively supportive or again reflecting there was uncertainty at this time:

- 4 respondents were supportive or very supportive of TfSE having general powers, whilst 3 respondents were neither supportive nor unsupportive. (7 responses in total).
- 4 respondents were supportive or very supportive of TfSE having railway powers, whilst 4 respondents were neither supportive nor unsupportive. (8 responses in total).
- 4 respondents were supportive or very supportive of TfSE having highway powers, whilst 3 were neither supportive nor not supportive, and 1 was not supportive.
- 6 respondents were supportive or very supportive of TfSE having funding and finance powers, whilst 2 neither supportive nor unsupportive about this. (8 responses in total).

3.5 The English Devolution White Paper was published on 16th December 2024. The White Paper set out a framework for development of combined authorities in the South East. At the time of writing Local Authorities are waiting for the outcome of their proposals to join devolution priority programme to be announced by government. For the time being TfSE will pause work on next steps until we gain greater clarity over the devolution proposals in the South East. Meanwhile TfSE will support local authorities in their devolution discussions in relation to Transport, as identified in the business planning paper. At the March board meeting we expect there will be further clarity on the geographies for the South East which will provide an opportunity for the board to consider next steps.

4. Conclusions and recommendations

4.1 The Partnership Board is recommended to review the responses Transport for the South East has received on its next steps consultation and note the opportunity to consider next steps at the March Partnership Board meeting.

RUPERT CLUBB
Chief Officer
Transport for the South East

Contact Officer: Keir Wilkins
Email: Keir.Wilkins@transportforthesoutheast.org.uk

Agenda Item 6

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

Date of meeting: **27 January 2024**

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

Title of report: **Business Planning 2025/26**

Purpose of report: **To approve Transport for the South East Business Plan for 2025/26**

RECOMMENDATION:

The members of the Partnership Board are recommended to:

1) **Review the draft Business Plan for 2025/26, noting the technical work that has been delivered in 2024/25;**
2) **Agree to submit the draft Business Plan for 2025/26 to the Department for Transport; and**
3) **Agree to spend our forecast uncommitted underspend of £317,435 on delivering additional technical work.**

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1. Introduction

1.1 The Business Plan 2025/26 is presented to the Partnership Board for approval, submission to the Department for Transport (DfT) and publication on the Transport for the South East (TfSE) website.

2. Background

2.1 DfT officials informed TfSE that they will seek views from Ministers on STBs' funding settlements at the end of January 2025. They offered STBs, the opportunity to submit their Business Plan to the Department in advance of this date.

2.2 Whilst it is not mandatory for us to submit our Business Plan by this date, it was agreed at the recent Partnership Board submit a Business Plan to DfT in January. We may need to redraft the Business Plan, following receipt of our actual funding settlement from the Department, but this would be brought to the March Partnership Board for approval.

3. Business Plan 2025/26

3.1 The draft Business Plan 2025/26 is attached in **Appendix 1**. The Business Plan is focused on how all of TfSE's technical work supports delivery. It has full-page features on our work to progress delivery of schemes in the Strategic Investment Plan and to support Local Authority delivery through our Centre of Excellence and Analytical Framework.

3.2 The Business Plan is aligned to guidance issued by the DfT, which asked us to demonstrate how our work contributes to the delivery of the government's Five Missions:

1. Kickstart Economic Growth
2. Make Britian a clean energy superpower
3. Take back our streets
4. Break down barriers to opportunity
5. Build an NHS fit for the future

3.3 The Business Plan acknowledges the number of policy changes that are likely to take place in 2025/26, including potential changes to local government structures in the South East. The Business Plan sets out that we will continue to adapt to the needs of government and local authorities, so that all our work is focused on helping them to deliver. The Business Plan sets out three clear roles for TfSE to support delivery:

1. Driving strategic investment forward now
2. Helping Combined Authorities hit the ground running
3. Convening stakeholders at a regional level

3.4 The Business Plan also demonstrates TfSE's strong track record up to this point. The Business Plan sets out how we delivered the technical work programme that we said we would deliver in our Business Plan for 2024/25, and the value this added for partners, supporting investment in transport.

3.5 The draft Business Plan will be formally submitted to Government and published on the TfSE website following agreement by the Partnership Board. We will then hope the government will confirm our funding allocation for 2025/26, allowing us to finalise our Business Plan in March 2025.

3.6 The Business Plan is supported by a more detailed work programme that will be used by the TfSE team to ensure that we remain on track to deliver our priorities and milestones.

4. Allocating our forecast underspend to additional technical work

4.1 As outlined in the Finance Update paper, at the end of Quarter 3, we can more accurately forecast our expected underspend to the end of the 2024/25 financial year.

4.2 We currently forecast an expected underspend of £528,435. £211,000 is committed carry forward, which is work that was agreed in the Business Plan for 2024/25, which is yet to be finished, but will be finished early in the 2025/26 Financial Year. £317,435 of carry forward is uncommitted and is based on cost efficiencies that TfSE has made in several work areas.

4.3 Because we have saved this £317,435, we are now able to re-allocate it to undertaking new technical work, on behalf of the Board. We recommend that it is allocated as follows:

Uncommitted Carry (subject to a Partnership Board decision)	
Expenditure	£
Electric Vehicle Charging – *Procuring the second version of the Electric Vehicle Charging Infrastructure tool.*	45,000
Centre of Excellence – *Providing additional support to Local Authorities in 2025/26*	120,000
Strategic Investment Plan (SIP) Refresh – *Doing a more intensive version of the SIP refresh, allowing us to identify top schemes and build an evidence base on resilience.*	48,000
Scheme Development – *Developing a funding and finance model for the A27 / M27 corridor, for submission to government.*	104,435
Total	317,435

4.4 **Electric Vehicle Charging - £45,000 -** This funding will be used to procure the second version of the Electric Vehicle Charging Infrastructure on behalf of TfSE's local authorities. The second version of this tool has a number of enhancements, including enhanced monitoring capability, updated EV fleet baselines and projections, including projections of energy need, identification of priority locations for potential rail and freight passenger hubs, and assessments of the commercial viability of EV charging investment. This improved tool will help local authorities to better use EV funding from the government, helping them make a bigger difference in increasing EV uptake in their local areas.

4.5 **Centre of Excellence - £120,000 -** This funding will be used to continue to develop our Centre of Excellence in 2025/26. This £120,000 in funding will complement the £50,000 of funding that we are asking the Department for Transport for in our Business Plan. The £50,000 in funding is to continue the day-to-day

running of the Centre of Excellence platform, but this additional £120,000 will be used to develop new tools, resources, and training for local authorities. This will help local authorities deliver their ambitious policy agendas for 2025/26, at a time when the government is asking them to do more work in several areas, like buses and EVs.

4.6 **SIP Refresh - £48,000 -** This funding will be used to do a more intensive version of the SIP Refresh, which the Partnership Board asked us to start following the Transport Strategy Refresh. A more intensive version of the SIP refresh will have several benefits for scheme delivery. We will be able to better develop our evidence base on the most significant schemes for the region, which will help us make a better case for funding for these "top schemes". We will also undertake new work to calculate the economic value of existing transport corridors in our region, to make the case for investing in the resilience of the transport network, through renewals and maintenance.

4.7 **Scheme Development - £104,435 -** This funding will be used to develop a funding and finance model for the A27 / M27 corridor, for submission to government. The A27 / M27 corridor vitally needs improvements, with issues on the A27 and M27 affecting congestion and journey time reliability across the whole South East. The government is not currently progressing improvements on the A27 and M27, but the Transport Secretary agreed to work with Transport for the South East and West Sussex County Council to find a solution for issues. A new funding and finance model could help to facilitate investment on the scheme, meaning it can be progressed this parliament, despite constraints to government finances. TfSE would work on the scheme with investors, before submission to government.

5. Audit and Governance Committee

5.1 The Audit and Governance Committee reviewed the Business Plan and recommended its approval to the Partnership Board.
5.2 Following Audit and Governance Committee, a PDF version of the Business Plan was designed, and minor amendments were made to finalise the text.

6. Conclusions and Recommendations

6.1 The Partnership Board is recommended to agree the Business Plan 2025/26 for submission to Government and to agree that the uncommitted carry forward of £317,435 is used to undertake new technical work areas.

RUPERT CLUBB
Chief Officer
Transport for the South East

Contact Officer: Keir Wilkins
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TRANSPORT FOR THE South East

Business Plan 25/26

CONTENTS

LOOKING TO THE FUTURE

COUNCILLOR KEITH GLAZIER, CHAIR, TFSE

The next few years are likely to bring changes in how transport is delivered in the South East.

Whilst the South East begins 2025 with no directly elected mayors and no combined authorities, the English Devolution White Paper provides a framework for the future arrangements in our region. We do not yet know exactly when combined authorities will form, what their geographies will be, or the transport powers different authorities will seek. But we know that the government will encourage combined authorities to develop – and that every combined authority will have their own ambitious agenda for transport.

Transport was the first power listed in the English Devolution White Paper – and Centre for Cities research shows that it is transport powers that resonate most with members of the public. This chimes with our experience at Transport for the South East (TfSE). We're currently refreshing our Transport Strategy – and we've had significant interest from local authorities, stakeholders and members of the public, with over 1,500 responses to our initial call for evidence.

It is going to be difficult to deliver the kind of change that local areas want, in order for the government to achieve its missions. Public finances are stretched at every level of government. The demand on our transport networks is greater than ever – and is likely to continue to grow with increased housebuilding. Climate change is increasing the frequency and severity of flooding and storms, meaning the resilience of our transport system is being tested.

All these challenges need urgent delivery: more transport infrastructure, that's more integrated, and better meets the needs of people. This is where TfSE are playing a critical role. We are helping move delivery forward.

Our Transport Strategy sets the basis for the region's future transport system – and our Strategic Investment Plan sets out the investment needed to achieve this. Working with partners, we have been progressing business cases and building a pipeline of schemes. Now is the time for the government to invest in those schemes – and TfSE stands ready to help, including by leveraging private funding and financing to bring down the cost to the taxpayer.

LOOKING TO THE FUTURE

COUNCILLOR KEITH GLAZIER, CHAIR, TFSE

Going forward, as combined authorities are formed, TfSE will provide them with the support they need to hit the ground running. TfSE's Analytical Framework, Centre of Excellence (CoE) and evidence base will be there on day one, meaning our authorities do not have to lose time before delivering improvements to transport they need in their local area.

Transport will not stop at local authority boundaries. TfSE can bring together local authorities at a regional level, supporting strategic transport that connects the whole of our region to London, the rest of the country and the world. The Wider South East Rail Partnership, bringing together TfSE, England's Economic Heartland, Transport East and Transport for London is an example of this. We're bringing the right people together to deliver tangible improvements to the rail network that cuts across all four geographies.

TfSE is here to help government and partners to deliver, providing the leadership and expertise needed to build a transport system that drives growth, supports communities, and meets the needs of the South East.

Councillor Keith Glazier

ABOUT US

As a Sub-national Transport Body (STB), TfSE forms a vital partnership dedicated to addressing the strategic transport needs of the South East. We work closely with our 16 constituent local transport authorities (LTAs), business groups, transport providers and stakeholders to identify transport solutions that meet the region's priorities.

Our mission is to grow the South East's economy through the delivery of a safe, sustainable and integrated transport system. We aim to improve the quality of life for residents, visitors and business while preserving the region's unique and diverse environment.

Our Role

TfSE remains focused on our role, which is set out in legislation.[1] We are here to develop a Transport Strategy for the South East and use that strategy to advise the government on the transport priorities for our region.

While local authorities retain responsibility for the delivery of transport in their area, TfSE has a role to support them, helping them to be more effective and efficient. We remain flexible. We will respond to our LTA's needs and support them on the areas they most need help with, as the government's policy agenda changes.

Our ongoing commitment to supporting LTAs is demonstrated through initiatives such as our Centre of Excellence, which provides access to industry-leading data, expertise, and resources. This enhances transport planning and design at the local level, empowering authorities to implement innovative and effective solutions.

TfSE's technical expertise and regional outlook enables us to bring together industry partners and key stakeholders. We champion the region's needs at the national level, aligning local and central government priorities wherever possible to create cohesive and effective transport strategies in collaboration with our LTA partners.

Working closely with our Audit and Governance Committee, we will ensure that everything we undertake delivers maximum value for money for government, constituent authorities and, most importantly, the taxpayer.

Our Region

We represent 16 local transport authorities: West Berkshire, Reading, Wokingham, Bracknell Forest, Windsor and Maidenhead, Slough, Kent, Medway, Hampshire, Southampton, Portsmouth, Isle of Wight, Surrey, East Sussex, West Sussex and Brighton and Hove.

[1] Section 5A of the Local Transport Act 2008, as amended by the Cities and Local Devolution Act 2016.

ABOUT US

Our Region cont...

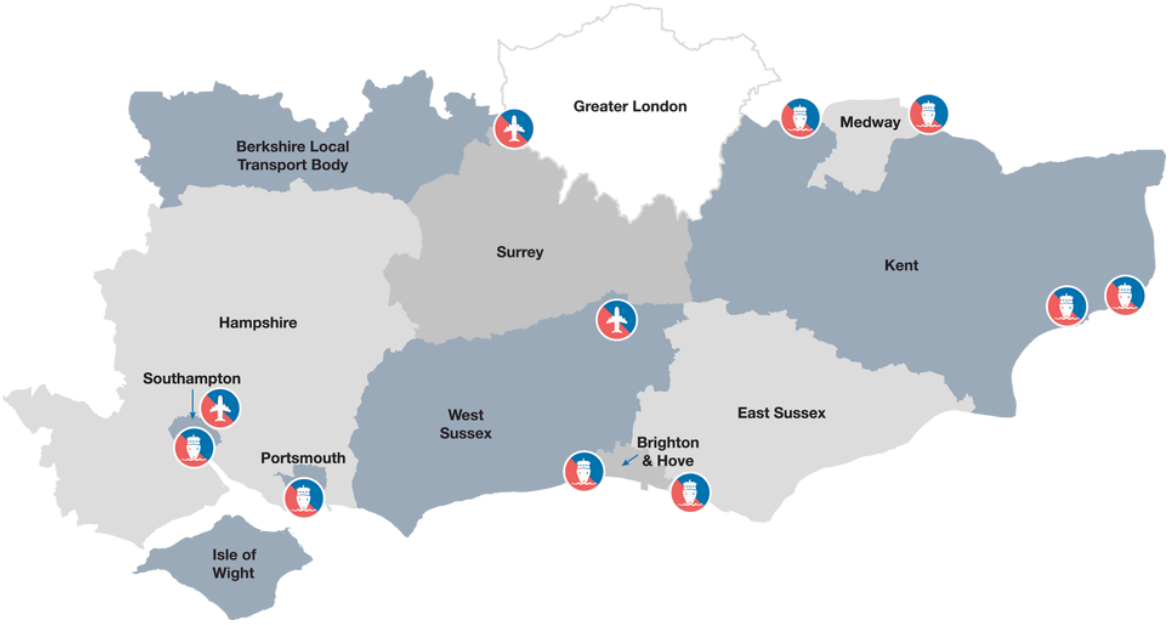
The South East is a region of national and global significance, serving as a crucial hub for connectivity and commerce. It is home to the country's two biggest airports, Heathrow and Gatwick, which together handle millions of passengers and freight tonnage annually.

Our transport network includes some of the busiest motorways in the UK such as the M25, as well as vital railway connections linking London, the rest of Britain and mainland Europe. Additionally, the South East hosts several of the nation's busiest seaports, underscoring our role as the UK's primary international gateway for people and goods.

Beyond its economic success and global status, the South East is home to world-renowned universities and research institutes, vibrant and diverse towns and cities and stunning coasts and countryside. It is a great place to live, work, study, visit and do business. With a growing population of over 7.8 million residents and the base for around 350,000 businesses, the region continues to thrive and expand.

Our vision is that by 2050 the South East will be the world's leading region for sustainable economic growth. To achieve this, we aim to provide a clean, safe, seamless transport system that enhances connectivity for people and businesses, while safeguarding the environment. This will mean more jobs, more opportunities to trade in the global marketplace and a better quality of life for everyone.

Since our establishment in 2017, we have made significant strides in supporting the region's LTAs and partners on key transport issues.



THE DIFFERENCE WE MADE LAST YEAR

In last year's Business Plan, we set out our plans to deliver four core work areas, with a focus on making a difference for government and our local authorities.

We are pleased to report that we have delivered all our priority areas in last year's Business Plan.

April - June 2024

- Launch of the Regional Centre of Excellence Platform
- Start to implement data management plan to support updated evidence base
- Complete work on our Regional Active Travel Strategy
- Complete work on the Future Scenarios that will inform the vision for the Transport Strategy
- Complete work on the forecasting of the impact of the electrification of vehicle fleets on the demand for charging infrastructure
- Progress Common Analytical Framework work on common data standards
- Provide support to LA delivery partners for business cases for Strategic Investment Plan interventions

July - September 2024

- Complete work on the waterborne freight study and study of future warehousing requirements
- Provide enhanced modelling capability for the South East
- Support strategic cases for larger Strategic Investment Plan schemes

October - December 2024

- Commence work on the delivery on the action plan for the Regional Active Travel Strategy
- Complete the drafting of the draft Transport Strategy and the integrated sustainability appraisal for it and commence the public consultation on it
- Complete work on the study of opportunities for intermodal transfer of freight from road to rail
- Complete work on a mode propensity tool
- Deliver updated map-based data viewing platform for the presentation of TfSE datasets
- Commence evaluation of the Regional Centre of Excellence

January - March 2025

- Finalise the Transport Strategy following the public consultation
- Refresh the "State of the Region Report"
- Refresh the Delivery Action Plan
- Measure the impact of the Regional Centre of Excellence

DRAFT TRANSPORT STRATEGY

We developed a **draft Transport Strategy** for the South East, which successfully went out for public consultation. This sets out the strategic direction for transport and provides a policy framework for the South East. The strategy is based around five missions which TfSE and the local authorities will need to deliver against in the future.

The Transport Strategy is based upon a comprehensive evidence base. Its development included a Need for Intervention report and scenario development work, as well as extensive engagement with a variety of stakeholders through workshops, a task and finish group consisting of TfSE Partnership Board members, and specific work with socially excluded groups.

CENTRE OF EXCELLENCE

In June, we launched the Transport for the South East Centre of Excellence, which now boasts over 200 registered users. The site has become a critical resource for skills development, knowledge sharing, and practical support for LTAs and beyond.

Key achievements include:

- Delivering targeted training in business case development, modelling and transport planning.
- Providing access to advanced data sets and in-house tools.
- Publishing over 250 resources, including toolkits for reducing carbon emissions and improving sustainability.
- Establishing a collaborative chat forum for real-time problem solving and idea sharing amongst peers.

Centre of Excellence objectives:

- Focus on building expertise and maximising LTAs' capability and capacity in core work areas.
- Provide advice, support and practical help with shortfalls and on the ground delivery.
- Be a forum for better communication between LTAs. It can facilitate idea exchange and enable LTAs to work together to solve common problems.
- Support better strategic case-making to help obtain more investment from government and deliver funding for schemes.
- Bespoke guidance to reflect different and specific needs of LTAs across the TfSE area.
- Create economies of scale through sharing resources and best practices to create consistency and reduce duplication.

The CoE has also become a valuable resource for the Department for Transport (DfT), facilitating the collection of insights and enabling LTAs to navigate challenges more effectively. We have partnered with organisations such as Network Rail, Active Travel England, and National Highways, alongside universities and professional institutions, to share best practice, lessons learned, helpful processes, and to encourage innovation. This collaborative approach reduces reliance on consultants, increases productivity, and most importantly, helps saves money for the local authorities at a time when finances are constrained.

STRATEGIC INVESTMENT PLAN

We have continued to support the implementation of our Strategic Investment Plan.

We provided funding to support our LTAs to develop eight schemes in the Strategic Investment Plan.

- £100,000 of support for West Sussex County Council to develop a Strategic Outline Business Case for A259 Chichester to Bognor Regis enhancements
- £75,000 of support for West Berkshire, Reading, Wokingham, Royal Borough of Windsor and Maidenhead and Slough to develop a feasibility study for A4 Berkshire - Quality Bus Corridor and active travel improvements.
- £50,000 of support for Surrey County Council to develop a feasibility study of London to Sussex Coast Highways (A22 N Corridor (Tandridge) South Godstone to East Grinstead.)
- £50,000 of support for Hampshire County Council to develop a feasibility study of active travel in South East Hampshire.
- £50,000 of support for East Sussex County Council to develop a Strategic Outline Business Case for the A22 North of Hailsham to Maresfield (MRN Pipeline) corridor.
- £50,000 of support for Brighton and Hove Council to develop a feasibility study for A27/A23 Patcham Interchange & Falmer Strategic Mobility Hub.
- £50,000 of support for Solent Authorities to develop a Strategic Outline Business Case for A2 Botley Line Double Tracking & A3 Netley Line signalling and rail service enhancements.
- £25,000 of support to Kent County Council to develop a Strategic Outline Business Case for Gatwick to Kent service enhancements.

Value Provided: £425,000 across our local authorities

ANALYTICAL FRAMEWORK

We have continued to develop our Analytical Framework, to build our evidence base, and allow us to provide more support to help our local authorities deliver.

We have updated our roadmap, initially drawn in 2021, which sets out the plan for developing our Analytical Framework over the next three years. This updated roadmap was approved by the Partnership Board in May. Following the plan, we have successfully hosted three South East Transport Modelling and Appraisal Forums. These forums provide a platform for technical officers to share experiences, best practices, and discuss challenges related to technical projects, particularly those involving modelling and business case development.

During the forums, LTA officers identified several data gaps. To address one of these gaps, we commissioned a regional travel survey which will establish a robust database to better understand travel behaviour in the region, enabling more evidence-based decision-making.

Following last year's South East Modelling Capabilities and Capacities Review, we have begun developing the South East Regional Assignment Model. This model will serve as a critical tool to support the refresh of the Strategic Investment Plan and provide inputs for other analytical tools. Furthermore, we are in the process of procuring a Transport Planning Analytical Toolkit. This tool will enhance our analytical capabilities, particularly for public transport, and provide journey time data by transport mode—another data gap identified by our LTAs.

We continue to collaborate with other STBs in the development of the Common Analytical Framework (CAF). We have implemented a Development Data Collection Log (D-Log) for collecting local plan data, adopted Transport for the North's (TfN) Electric Vehicle Charging Infrastructure (EVCI) Visualiser Tool in the South East, and, in partnership with England's Economic Heartland and Transport East, rolled out the Carbon Assessment Playbook.

With the help of our host authority, we have identified a preferred solution for a central system database. This will enable us to better manage modelling outputs and integrate with our Geographic Information System(GIS) environment. We will progress with the build and migration next financial year, which will result in enhanced capability to share data with stakeholders.

TFSE WORKSTREAMS

In addition, we have also supported the government and local authorities on a number of other thematic workstreams:

Electric Vehicles

We rolled out TfSE's version of the STB Electric Vehicle Charging Infrastructure Visualiser Tool to local authorities across the area, through the Centre of Excellence platform.

We continued to facilitate TfSE's Regional Electric Vehicle Charging Infrastructure Forum, bringing together local authorities, fleet trade bodies, and distribution network operators to share best practice.

Value Provided: Over £30,000 per Local Authority

Active Travel

We developed a Regional Active Travel Strategy and Action Plan which, subject to the Partnership Board's final approval, supports the active travel work being undertaken by LTAs, by setting a regional framework for active travel, identifying opportunities for joint working and cross-border schemes and sharing best practice.

We continued to facilitate TfSE's Regional Active Travel Steering Group consisting of representatives from all 16 LTAs and national partners.

Freight

We completed work on our studies on the potential for modal shift from road to waterborne freight, the future requirements for warehousing and the development of Intermodal Rail Freight Interchanges (IRFI) to support increases in rail freight in our area.

We held three successful meetings of our Wider South East Freight Forum at which members discussed topics including infrastructure planning for lorry parking and driver facilities, and addressing the challenges of decarbonising the freight and logistics sector.

Decarbonisation

We rolled out the cross-STB developed Carbon Assessment Playbook, through the Centre of Excellence, which helps local authorities make decisions about which transport interventions to implement to reduce carbon emissions.

Future Mobility

We continued to facilitate the South East Future Mobility Forum with meetings on community transport and Digital Demand Responsive Transport (DDRT), shared mobility, sustainable logistics, and procurement & funding.

WHAT WE ARE GOING TO DO IN 2025/26

In 2025/26, our work is focused on enabling the government to achieve its missions:

- Kickstarting Economic Growth
- Building an NHS Fit for the Future
- Safer Streets
- Breaking Down Barriers to Opportunity
- Making Britain a Clean Energy Superpower

The transport system in the South East is central to delivering economic growth, breaking down barriers to opportunity, and delivering a transition to clean energy.

Kickstarting Economic Growth

The South East is home to 7.8m residents. There are 3.8m jobs in our region, and a number of our residents live in the South East and work in London. The South East adds £230bn in Gross Value Added (GVA) to the economy and is one of the only STB regions that is a net contributor to the taxpayer, helping to pay for vital public services across the country.

The South East is Britain's gateway to Europe and the rest of the world, with 18% of the UK's freight tonnage served by South East ports; 40m passengers travelling through Gatwick Airport; 18m Channel Tunnel passengers; and 13m ferry passengers. Kickstarting economic growth in the South East will kickstart it for the rest of the country too.

The South East is a place that people want to trade with, invest in, and live in. But poor strategic connectivity holds the South East back. Whilst connections into London are mostly strong, many orbital and East-West corridors are poorly served. Often, it is faster to travel from one part of the South Coast to another via London than directly along the South Coast's highway or railway corridors.

WHAT WE ARE GOING TO DO IN 2025/26

Kickstarting Economic Growth cont...

These connectivity gaps prevent communities along the South Coast benefiting from agglomeration – the pooling and sharing of resources and talent that drives prosperity. This issue is particularly acute within the region's largest urban centres. For example, it takes longer to travel from Southampton to Portsmouth by train than from Southampton to Bournemouth, despite the latter being a greater distance.

Despite being relatively prosperous as a region, parts of the South East suffer from severe deprivation. There is a clear opportunity to make significant in-roads in kickstarting economic growth by connecting more deprived communities to economic opportunities. The GVA per capita of less well-connected areas is less than half that of other areas in the South East. People in coastal, rural, and island communities are particularly affected, with over 75% of Hastings' residents being in the top 2 highest risk groups of Transport Related Social Exclusion nationwide.

Joining up the South East's towns and cities with better transport would help to increase productivity, create more high-skilled jobs in the region, and attract more overseas investment. TfSE has a key role in identifying the investment needed, supporting the development of schemes' business cases, and working with government to unlock private sector funding and financing.

Making Britain a Clean Energy Superpower

To become a clean energy superpower, we need to decarbonise our transport system. The rapid decarbonisation of the UK's energy networks has been a critical success story, with a shift towards renewable sources like wind and solar power.

However, despite this momentum, the UK's transport system is still significantly behind many of its peers. For example, only 38% of Britain's railways are electrified, in stark contrast to countries like Sweden, where over 75% of the rail network runs on electricity. Furthermore, the UK currently trails many European countries in the provision of electric vehicle chargers – including Scandinavian countries, the Low Countries, and France.

WHAT WE ARE GOING TO DO IN 2025/26

Making Britain a Clean Energy Superpower cont...

To make Britain a clean energy superpower, we need to improve rail connectivity between the South East's major cities, towns, ports and airports. Heathrow is currently not served by rail connections from the South, and Gatwick is poorly served by direct rail connections from Kent. Rail needs to be decarbonised, and the railway's assets need to facilitate clean energy generation where possible. Electric vehicles (EVs) will also play a critical role, particularly in places where public transport provision is poor. To make EVs work, charge point provision needs to improve in the South East, to better match current demand and facilitate the future uptake of EVs.

TfSE can play a key role in helping to advise the government on prioritising investment and supporting local authorities to deliver EVCI in the right places, in the right sequence. TfSE's Carbon Assessment Playbook is also supporting local authorities to decarbonise their transport network.

We also need to make sure that we continue to grow the supply of decarbonised energy to match the demand of the region's transport network. To that end, we work with OFGEM – and look forward to increasing engagement through OFGEM's Regional Energy Strategic Plans, which will mirror the STB geographies.

The government's other missions

Transport also plays a supporting role in delivering the government's other missions. A reliable, well-connected transport system is key to getting patients and staff to NHS appointments. TfSE work with the NHS as part of our Transport Forum, to ensure they can feed into our plans.

Safety on public transport is critical to delivering a safer country. As part of our Transport Strategy, TfSE is working with socially excluded groups, to ensure we capture their views about how to address and improve this important issue.

Transport is also a key part of the 'Breaking Down Barriers to Opportunity' mission. Students often depend on reliable public or home-to-school transport to get to school and college. These are challenges for LTAs' budgets. Whilst the answer to fix these is increased funding for local transport, TfSE can play a key supporting role through our Centre of Excellence.

WHAT WE ARE GOING TO DO IN 2025/26

TfSE's Role in a Changing Landscape

Since we first came together to form a voluntary partnership in 2017, TfSE has had a clear role: helping to grow the South East's economy, by progressing strategic investment in transport across the region.

In doing so, we have always been cognisant that we're here to support delivery of the government's missions and our local authorities' objectives. We know that the recent English Devolution White Paper will mean changes to local government structures in our region. These changes will take effect at the same time as several other policy developments:

- The government is increasing housebuilding, with changes to the National Planning Policy Framework recently consulted on, in advance of the Planning and Infrastructure Bill.
- Local authorities will be asked to drive forward buses, active travel and electric vehicle charge point provision in their area, with significant funding from government, and devolution of powers.
- The government is developing an Integrated National Transport Strategy, covering all of England.
- The government is taking the rail network back into public ownership, and is creating Great British Railways to bring together passenger rail operations with management of rail infrastructure.
- The government and local authorities are facing financial pressures, meaning funding for new infrastructure is limited.

Given the number of policy changes, we will continue to adapt to the needs of government and local authorities, so that all our work is focused on helping them to deliver.

WHAT WE ARE GOING TO DO IN 2025/26

We see ourselves as having three clear roles to support delivery:

1. Driving Strategic Investment Forward Now

While any changes resulting from the Devolution White Paper will take some time to take full effect, TfSE's core role is now more important than ever.

We will continue to make the case and provide advice to government for investment in strategic transport, through our Regional Transport Strategy, Strategic Investment Plan, and Analytical Framework. We will continue to drive investment forward by progressing business cases, supporting delivery organisations and identifying private sector funding.

Investment in strategic transport is essential to enable housebuilding and the government's broader growth agenda, and TfSE will play a vital role in making sure it continues to happen over the next few years.

2. Helping Combined Authorities hit the ground running

As combined authorities are formed, each will develop its own ambitious transport agenda. TfSE can play a key role in helping emerging combined authorities hit the ground running.

Instead of having to develop their own evidence base and analytical frameworks before delivering anything, which would take valuable time, combined authorities will be able to make use of TfSE's Analytical Framework, evidence base and tools on day one.

Combined authorities will also be able to benefit from TfSE's Centre of Excellence, which helps them with tools, training and case studies. This will help authorities to build better local transport plans, business cases, and a pipeline of schemes.

3. Convening stakeholders at a regional level

As the English Devolution White Paper sets out, there is power in combined authorities coming together to work at a wider, regional level, through organisations like STBs.

Many of the issues that affect one combined authority in the South East will affect all combined authorities across our region, and TfSE can continue to play a useful role in bringing together leaders and transport professionals to solve problems.

Most of the key strategic transport corridors in the South East cut across local authority geographies, and this is likely to continue to be the case after combined authorities are formed, with most of the South East's key corridors going East-West, or into London.

TfSE is already playing a key role in bringing together authorities through our Wider South East Rail Partnership, which brings together England's Economic Heartland, Transport East and Transport for London to work on rail issues that cut across our boundaries.

OUR VITAL WORK THAT SUPPORTS DELIVERY

Analytical Framework

In the coming year, the development of the Analytical Framework will prioritise collecting data to address the gaps identified by LTAs and alleviate financial burdens on our partners during their model developments. We will continue to enhance our analytical capability to provide as much support as possible to our LTAs.

- We will procure **mobile network data (MND)** at the regional level, and share insights with our LTA partners - a robust source for understanding travel demand and addressing one of the main data gaps in the region. This data will be used to rebase the South East Highway Assignment Model, and potentially other more local models, ensuring they are fit for its intended applications.

- We will also continue to explore opportunities to **collaborate** with the DfT and academia, focusing on areas where analytical methodologies are less established. For example, we are partnering with the Consumer Data Research Centre through their Masters dissertation scheme, inviting Masters' students to contribute to the Analytical Framework with research targeting transport resilience. We plan to trial DfT initiatives, such as the connectivity tool and population synthesiser, once they are developed.

- Our quarterly **Regional Modelling and Appraisal Forum** continues to enhance regional collaboration among LTAs. Nationally, we will maintain our work with other STBs to develop and contribute to the CAF. This initiative will eliminate duplication and provide common data, modelling, and analytical standards, ensuring a consistent approach across the region and among STBs.

- We will build the **data architecture** that has been identified through our requirements gathering. This is essential as it will be required to store the outputs from our enhanced modelling capabilities.

- Finally, **planning data** originally collected in 2023/4 will be refreshed. The timing of the original data collection was not optimum as many planning authorities were working on their updated local plans. A data collection exercise in 2025 will offer more accurate planning data to be used for SIP refresh, and for use as a modelling input in the future.

OUR VITAL WORK THAT SUPPORTS DELIVERY

Strategic Investment Plan Implementation

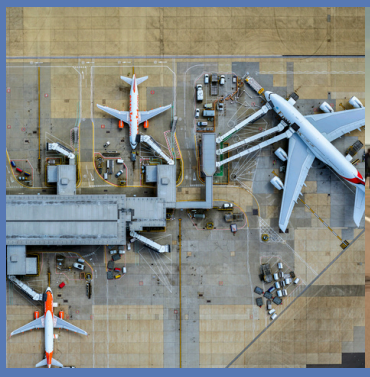
This year we will continue the work, outlined in our Delivery Action Plan, that commenced in 2023/24. We will continue to support our LTAs develop a pipeline of schemes and make the case for funding in alignment with the new government's objectives and our updated Transport Strategy.

We will also continue to support our LTA partners through the CoE, developing new content and providing a place for best practice to be shared.

Through collaboration with delivery partners and the DfT, we will continue to provide direct support to partners to fund the development of Feasibility Studies and Strategic Outline Business Cases for schemes named in the Strategic Investment Plan (SIP) that would not otherwise be able to progress. The economic situation is still difficult and this work will help to ensure that LTAs in the South East have a strong pipeline of schemes, which allows them to access capital funding as soon as it is available. We will continue to bring together government and industry leaders through our Funding and Finance Working Group to explore how we can unlock greater private sector investment in transport infrastructure.

We stand ready to provide advice to Ministers on the priorities for investment in transport across the south east. Our strategic prioritisation framework and tool will allow us to tailor that advice to fit different criteria depending on the ask from government.

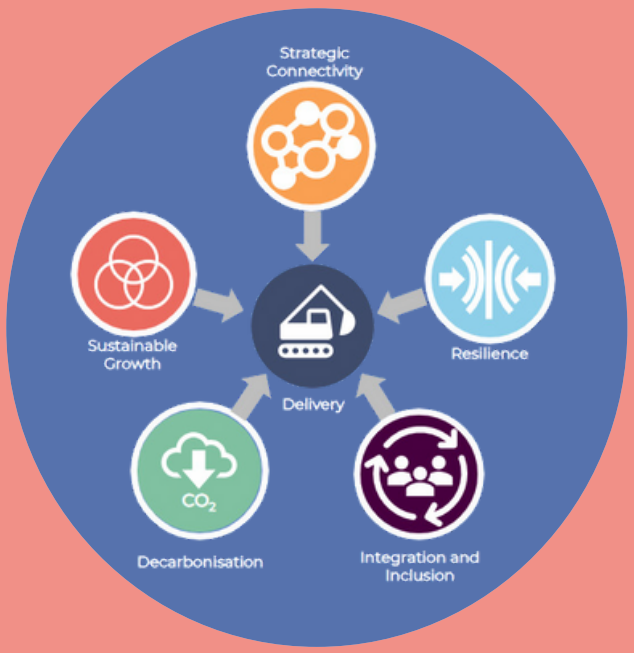
We will report on the progress on delivery and the benefits arising from both schemes and global interventions in the SIP through our Monitoring and Evaluation Framework and Annual Report.




OUR VITAL WORK THAT SUPPORTS DELIVERY

Transport Strategy

The work we began on the strategy refresh in 2023/24 will continue this year as we move from draft into a final version. A 3 month, public consultation on the strategy was launched in December 2024 to help provide feedback and insight from users, LTAs and stakeholders. Following this process, a consultation report will be published alongside the final version of the strategy. This is currently planned to be submitted to government by October 2025.



During 2025 we will review our technical work programme to ensure it is fully aligned with these missions and will also identify the scope of new work programme elements focussed on both the Resilience and the Inclusion and Integration missions.

Strategic Connectivity. We will boost connectivity in the South East by enhancing strategic regional corridors and ensure all communities can access high-quality transport links and key services.

Resilience. We will safeguard the South East's connectivity and enhance the reliability and resilience of our transport systems for future generations.

Inclusion and Integration. We will create an inclusive and integrated transport network in the South East that offers affordable, safe, seamless, door-to-door connectivity for all users.

Decarbonisation. We will lead the South East to a net zero future by 2050 by accelerating the shift to zero-emission travel, incentivising sustainable travel choices, and embracing new technologies to reduce emissions and combat climate change.

Sustainable Growth. We will champion transport interventions that unlock investment opportunities, enable sustainable growth, and create healthy, vibrant, and well-connected communities.

OUR VITAL WORK THAT SUPPORTS DELIVERY

Centre of Excellence - Looking Ahead

Future activities will include bespoke support, including one-to-one guidance on scheme development alongside the dissemination of analytical, research, data, strategic, and technical expertise.

The platform's reach continues to grow, attracting interest from district and borough councils, operators, and national agencies. This increased demand highlights the CoE's effectiveness and capacity to deliver scalable, value-added solutions.

By equipping LTAs to navigate complex challenges despite limited resources, the CoE plays an important role in strengthening local transport capabilities. With continued support, it can sustain and grow its contribution to local authorities and the broader transport sector, ensuring alignment with national priorities and driving continued progress.

What will the CoE offer for the technical work programme of TfSE?

Transport Strategy Refresh:
All data, webinars and relevant resources will be shared through the CoE. This includes the work underpinning scenario development, lessons learned from engagement, and work with socially excluded groups.

Electric Vehicle Infrastructure:
Data that is collected through this workstream will be provided to LTAs on the CoE. Any future iterations of the tool will be updated live on the site, to ensure that LTAs are using the most up to date version of the tool .

Active Travel:
This workstream will offer engagement opportunities to partners. It will go further than just local authority officers, and discussions can be facilitated between partners within the Chat Forum. Any relevant resources, webinars, events and case studies will be shared through the CoE to maximise reach and impact.

Future Mobility:
Development of a first and last mile strategy/toolkit will be hosted on the CoE for officers' use. Any relevant webinars or events that will be hosted relevant to future mobility will be advertised and recorded for future use. Best practice and lessons learned will be collated through this engagement and provided to officers via the CoE.

OUR VITAL WORK THAT SUPPORTS DELIVERY

Centre of Excellence cont...

Decarbonisation:
The Carbon Assessment Playbook tool is hosted on the Centre of Excellence, alongside the training webinars. Future support is being provided and facilitated through the CoE. Any software updates will be provided through the site, to further enhance the support provided. All data that is collected as part of this workstream will be hosted on the CoE Data Hub.

Freight:
Collected data will be stored on the CoE through the CoE Data Hub. The site can also host engagement activities, their outputs, developed tools, and case studies.

Rail:
This workstream will offer engagement to partners and will go further than just local authority officers, and discussions can be facilitated between partners within the Chat Forum.

SIP Implementation:
Through this workstream, we will be able to provide seminars and walk throughs to approaches in a classroom format for more technical officers, to supplement the business case training series that was offered in 2024. Additionally, case studies and full business cases will be published on the CoE, and revisited in twelve months to understand how the schemes are being monitored and evaluated, and hear more on the local impacts. Any data or evidence collected through these projects will be made available through the CoE.

SIP Refresh:
New data that is collected as part of this workstream's development will be published on the CoE.

Analytical Framework:
All the data and analysis (i.e. Regional Travel Survey, journey times, origin destination travel matrices, synthetic travel demand) and tools (South East Regional Highway Assignment Model, Travel Market Synthesiser) will be made available to LTAs via the CoE. With the continued development of our analytical toolkit and the expansion of in-house analytical capabilities, we will be well-positioned to offer more analytical advice and support to our partners. The CoE will serve as the primary platform for communicating with and addressing queries from LTAs.

OUR VITAL WORK THAT SUPPORTS DELIVERY

Electric Vehicle Infrastructure

This year we will continue with the action plan developed as part of our **Electric Vehicle Charging Infrastructure (EVCI) Strategy and Action Plan** adopted in 2023. We will continue to host TfSE's Regional EVCI Forum on a quarterly basis to bring together key stakeholders from across the region to share best practice and discuss the challenges and issues that are being with regards to the rollout of EVCI.
We will complete phase 2 of TfSE's fleet electrification work, which will develop guidance for LTA's to support them with planning EVCI that will be accessible for commercial fleet vehicles.

Active Travel

Once the Partnership Board has considered and agreed the **Regional Active Travel Strategy and Action Plan** (RATSAP), we will:

- Continue to facilitate meetings of the Regional Active Travel Steering Group to ensure accountability and provide guidance on the implementation of the RATSAP.
- Encourage and support collaboration on cross-boundary active travel corridors and joint working across LTAs.
- Support progression of the Strategic Active Travel Network through scheme development funding to conduct feasibility studies and business cases.
- Hold discussions with transport operators (bus, rail, and micromobility/hire schemes) to identify ways to break down barriers and capitalise on opportunities to better integrate their use with active travel.
- Work with the NHS to support and identify ways to encourage shift to active travel and other sustainable modes for staff, patient, and business travel.
- Scope development of a First & Last Mile Strategy and Hubs Assessment Approach, both of which also complement tasks within the Future Mobility Action Plan.
- Continue to develop the repository of active travel data through coordination with partners on existing datasets and primary data collection through a regional survey.
- Develop knowledge sharing and learning opportunities through webinars, training, site visits, and case studies.

OUR VITAL WORK THAT SUPPORTS DELIVERY

Freight

This year will see the continuation of our programme of activity to increase freight awareness within the local transport authorities and local planning authorities. We will also be developing the work undertaken by Midlands Connect on the Alternative Freight Fuel Infrastructure tool to enable us to identify potential locations where multiple freight functions could be hosted such as public HGV recharging, parking, and modal interchange hubs. We will also be holding further meetings of our **Wider South East Freight Forum.**

Rail

We will develop a **Rail Strategy** to enable TfSE to provide advice to Secretary of State, Great British Railways and the Office for Road and Rail about our priorities for rail investment in the TfSE area. The strategy will identify rail priorities for our area's passengers and freight operators that improve connectivity and unlocking growth. The work will see the development of a focussed evidence base alongside extensive stakeholder engagement. We will continue to actively participate with England's Economic Heartland and Transport East in the **Wider South East Rail Partnership.** which aims to work with the newly created Great British Railways, DfT, Network Rail and Transport for London to secure the identification of shared priorities and better strategic planning that maximises the potential of our wider rail network, ensuring integration between our respective national and regional transport strategies and our constituent local authority's Local Transport Plans.

Future Mobility

We will continue to convene our **Future Mobility Forum** on a quarterly basis involving key stakeholders from across the region involved in this sector. The themes that will be explored include Mobility Hubs, Integrated Transport, Data, Mobility Credits/Incentives, Transport Resilience, and Public-Private Collaboration.
We will develop a First & Last Mile Strategy or Toolkit and Hubs Strategy both of which also complement actions identified with the Regional Active Travel Strategy and Action Plan.

Decarbonisation

During this year we will be undertaking further refinements and improvements to the **Carbon Assessment Playbook Tool** that we launched in August 2024. This work will include updating the base year data in the tool from 2019 to 2024 and enhancement to enable the impact of transport interventions on emissions from freight traffic to be assessed.

ENGAGING WITH STAKEHOLDERS

Successful and mutually beneficial **partnerships** are imperative to the ongoing success of what we do. This has been previously demonstrated throughout the work we have done in developing our Transport Strategy and SIP and continues to be a vital aspect of our work as we continue the implementation of the interventions contained within our SIP.

Looking ahead, engagement will continue to be at the heart of our communications activity. We will continue to seek new and foster existing partnerships, particularly with regards to our Transport Strategy Refresh activity under the banner of **'Your Voices'.** Plans include attendance at a variety of events, online surveys, social media activity and dedicated podcasts as we support the consultation.

Naturally, we will continue to communicate regularly with all stakeholders regarding all aspects of our work in a variety of ways. This includes physical and virtual meetings, social media, and regular website updates, along with our monthly newsletter and monthly podcast.

Bespoke engagement sessions will remain the backbone of much of our activity to ensure stakeholders are always fully briefed on our work programme as it develops in a timely and relevant fashion.

The Website Revamp

In Autumn 2024, we undertook a refresh for the TfSE website to improve navigation and prepare for additional web traffic as a result of the Transport Strategy consultation.

A steering group including members of the TfSE team and website users, was convened to understand the key elements of the site and identify any new areas for inclusion. This was overseen by our communications team and the updated website was launched in October.

ENGAGING WITH STAKEHOLDERS

The TfSE Podcast

As part of our aim to engage a more diverse audience, the 'TfSE Podcast' was launched in September 2023. Since then, we have published monthly episodes on a variety of topics, including data, transport scheme development, accessibility in public transport, and healthy streets.

Looking ahead to 2025, planned topics include the 'Your Voices' survey, Active Travel, and highlights of the work carried out by TfSE teams, such as the Transport Strategy. The podcast is continuously reviewed to ensure it remains relevant and engaging, with a focus on identifying areas for improvement.

'Your Voices' Survey

The public consultation on our draft Transport Strategy invited input from residents, businesses, and interest groups across the South East, seeking their perspectives on our transport vision.

In addition to gathering feedback on the strategy itself, we asked for views on key transport priorities, including driving economic growth, connecting communities, and achieving net zero in the coming decades.

Planned engagement activities to support the consultation included TfSE roadshows, Transport Strategy surgeries, social media campaigns, press releases, and dedicated podcast episodes, ensuring a wide reach and meaningful input which will be evaluated after the March deadline.

Business Advisory Group

TfSE established a Business Advisory Group (BAG) in quarter 3 of 2024. The BAG provides the business voice to support, advise and contribute to the Partnership Board. It allows TfSE to stay up to-date with the top transport-related challenges and opportunities that businesses face in the South East.

ENGAGING WITH STAKEHOLDERS

Public Affairs Activity

With 76 MPs across our region, an increase from 71 following a recent Boundary Commission review, it is vital we continue to create a dialogue with MPs about the work of TfSE, including projects in their own constituencies. This has become even more important since the 2024 general election which saw 50 new MPs across the region.

We have continued with the programme of MP engagement which began last year, meeting MPs to introduce TfSE and discuss relevant constituency transport issues. In 2024 we met 12 MPs, 8 of which took place after the general election.

Our constituency factsheets, detailing local work that features in our SIP, were refreshed in 2024 are sent to MPs following our TfSE meetings and available on the TfSE website.

We also attended the Liberal Democrat Conference in Brighton in September 2024. We met the majority of the 18 new regional Lib Dem MPs at this event. We represented all the STBs at this conference, and in turn, the other STBs represented us at the party conferences that were held in their regions.

Joint working with other STBs

Meeting regularly and working closely with the other 6 STBs across England ensures the sharing of best practice and delivers efficiencies in our collective work. We have already worked together on a variety of issues including decarbonisation, the Electric Vehicle Charging Infrastructure roll out, the development of a Common Analytical Framework and our Centre of Excellence.

Notable collaborations include working jointly with England's Economic Heartland and Transport East on our Bus Back Better support programme; developing a Carbon Assessment Playbook; and our work programme to increase public sector freight awareness. We also continue our work with the Wider South East Freight Forum and the Wider South East Rail Partnership. Moving forward, we are keen to seek out further opportunities to work collaboratively with other STBs, so that we continue to ensure that we deliver best value for the taxpayer.

RESOURCES

TfSE operates a mixed funding model. Operational and staff costs are in part funded by contributions from LTAs, while our technical programme relies on grant funding from the DfT. This approach reflects our commitment to delivering best value for our partners and taxpayers.

This Business Plan is based on receiving a rollover of our grant funding from the DfT, which in 2024/25 was £2.065m.

Funding from our 16 LTAs, which for 2025/26 amounts to just under £500,000, is used to support our staff costs. The approach for calculating contributions was developed with members and reflects the relative sizes of different member authorities. We are committed to maximising value for money – and have frozen the cost of local authority contributions for the last 7 years.

Our total income for the year will be approximately £3.5 million. This is based on an estimated carry forward of £528,435 for technical work and a carry forward of £406,730 for TfSE's reserve for 2024/25.

RESOURCES

Income	£
DfT Grant	2,065,000
Local Contributions	498,000
Technical Programme Carry Forward 2024/25 (Estimated)	528,435
Carry Forward for TfSE Reserve	406,730
Total Income Including Reserves	**3,498,165**

Expenditure	£
Staffing	1,250,0000
Technical Programme for 2025/26	1,025,000
Completing 2024/25 tech programme	528,435
Governance	25,000
Operational Expenses	75,000
Communications and Engagement	98,000
TfSE Reserve[1]	496,730
Total Expenditure Including Reserves	**3,498,165**

[1] TfSE is obligated to hold a reserve that would cover all our staff redundancy costs, in the event of being wound up as an organisation. The money we hold back for a reserve will increase in 2025/26, as redundancy costs increase.

RESOURCES

Technical Programme for 2025/26

We set out what we deliver for each workstream in **Section 5: Our Vital Work that supports delivery.** This table shows the breakdown of our technical programme spend using DfT funding for 2025/26.

Expenditure	£
Transport Strategy	40,000
Future Mobility	40,000
Active Travel	45,000
Freight	115,000
Electric Vehicle Infrastructure	45,000
Rail	75,000
Strategic Investment Plan Implementation	150,000
Strategic Investment Plan Refresh	50,000
Analytical Framework	265,000
Centre of Excellence	50,000
Other Costs and Technical Support	150,000
Total	1,025,000

RESOURCES

Completing 2024/25 Technical Programme

We also have a carry forward that is expected to come in at £528,435. This will be spent as follows:

Committed Carry Forward	
Expenditure	**£**
Transport Strategy	101,000
Analytical Framework	20,000
Decarbonisation	40,000
SIP Implementation *Supporting Kent-Gatwick Strategic Outline Business Case (SOBC)*	50,000
Sub-Total	**211,000**
Uncommitted Carry Forward (subject to a Partnership Board decision)	
Electric Vehicle Charging *Procuring the second version of the Electric Vehicle Charging Infrastructure tool*	45,000
Centre of Excellence *Providing additional support to Local Authorities in 2025/26*	120,000
SIP Refresh *Doing a more intensive version of the SIP refresh, allowing us to identify top schemes and build an evidence base on resilience*	48,000
Scheme Development *Developing a funding and finance model for the A27 / M27 corridor, for submission to government*	104,435
Sub-Total	**317,435**
Total	**528,435**

RESOURCES

This carry forward is expected to come in at £528,435 because in 2024/25, we have driven down costs in every area of our business, seeking savings wherever possible.

- We forecast an underspend on salaries and training of £180,000, as we have held vacancies in the team, and minimised spending on training.

- We predict an underspend on our technical programme of £265,000. £211,000 of this is committed carry forward, to finish work on the Transport Strategy, Analytical Framework, decarbonisation, and to support the Kent-Gatwick SOBC. The other £54,000 will be uncommitted carry forward, due to underspends on thematic work areas, as we sought cost efficiencies.

- We forecast an underspend of £40,825 on communications and engagement, as we have reduced our communications spend and cancelled our planned Connecting the South East event for 2024.

- We forecast an underspend of £42,610 on governance and operational expenses, as we have sought to save money by foregoing attendance at events and conferences and have delayed planned work to review TfSE's governance structures.

These savings allow us to undertake more technical work on behalf of government and our local authorities, and we will continue to pursue them in 2025/26.

If we have 20% more funding...

The DfT also asked us to profile what more we could do if we had 20% more funding, which amounts to an extra £413,000.

Whilst the rollover in funding allows us to deliver our core responsibilities, developing a Transport Strategy and providing advice to government, our third responsibility is to support our local authorities, helping them to be more effective and efficient.

We can scale up this work to match the level of the support that the government wants us to provide. At a time when the government wishes to deliver a number of significant missions, TfSE is uniquely placed to support local authorities to deliver, by building expertise at a regional level.

For example, there are cost savings to building and procuring the EVCI Locate Tool once at a regional level, rather than each local authority procuring the tool on their own.

There are cost efficiencies to the government funding TfSE to support our local authorities – and TfSE would ask the government to consider funding TfSE in each policy areas' budgets on thematic areas like EV.

RESOURCES

If we had 20% more funding from DfT (£413,000) we would spend it as follows:

Workstream	What the money would be spent on	£
Electric Vehicle Infrastructure	We would update and refine the methodology for forecasting the impact of the electrification of vehicle fleets on public charging infrastructure, particularly the forecasts for HGVs. This would provide additional support to local authorities, helping them best place charging infrastructure to meet the emerging demand.	50,000
Centre of Excellence	With an additional £50,000, TfSE will provide enhanced training, data, and bespoke one-to-one support to the top areas identified by LTA officers. This would help LTA officers effectively deliver a number of DfT priorities, such as buses and active travel, where DfT are providing increased funding in 2025/26.	50,000
Analytical Framework	We will be able to develop our multimodal analytical tools by creating a travel demand model using an agent-based approach. STBs are in an excellent position to trial these innovative techniques and share our findings with both the DfT and our partners. Having already collected regional travel behaviour data and developed other tools to provide the robust inputs required for agent-based modelling, we are well-positioned to advance this initiative. Once developed, this tool will be capable of assessing various interventions targeting consumer behaviour, such as mobility hubs and mass transit systems—areas that conventional analytical models have struggled to address effectively. Additionally, we will be able to provide greater support to our partners in local data collection, particularly with traffic survey data, to address some of the geographic data gaps.	200,000
Additional Scheme Development	With an extra £113,000, we would support the development of two additional schemes' business cases, helping our local authorities to deliver our Strategic Investment Plan.	113,000

OUR TEAM

We know that all our funding comes from the taxpayer, whether that is through grant funding from the DfT, or contributions from our local authorities.

Because of this, we maintain a laser-focus on maximising value for money. We keep a lean structure and start 2025/26 with just 17 full-time employees. In line with government guidance, our staff complement is to deliver our Business Plan, where it would be more expensive to use consultants.

It can be a real challenge to recruit skilled staff in many areas of the transport sector. The impact of this is far reaching and being unable to recruit the right talent to fill vacancies or skills gaps can affect the work capacity and growth of an organisation. To grow capacity both within TfSE and the wider industry, we have a staff member who is undertaking a Project Management Apprenticeship, and we are partnering with the Consumer Data Research Centre through their Masters dissertation scheme, inviting Masters' students to contribute to the Analytical Framework with research targeting transport resilience.

The team works closely with and draws additional support from officers from our constituent authorities and other stakeholder groups. This approach to partnership working ensures TfSE provides best value to our partners and taxpayers.

Our team is highly skilled, agile, and responsive to the changing needs of government and local authorities.

OUR TEAM

Rupert Clubb
Chief Officer
Rupert leads the development of Transport for the South East. He chairs the Senior Officer Group and supports the Chairman and Partnership Board.

Mark Valleley
Head of Strategy
Manages the technical work programme including the development and delivery of the Transport Strategy.

Sarah Valentine
Head of Analysis and Appraisal
Manages the development of our analytical framework including the data analysis, modelling and appraisal tools that support scheme business cases and the implementation of our Strategic Investment Plan.

Keir Wilkins
Head of Programme and Policy
Manages TfSE's finance, programme, governance, communications and engagement. Responsible for TfSE's policy and work on TfSE's future role. Manages TfSE's Centre of Excellence.

MOVING EVEN FURTHER FORWARD

RUPERT CLUBB, CHIEF OFFICER

The new government has outlined its priorities for a 'mission-driven' agenda, promoting a programme of national renewal across the nation's health, education and criminal justice systems, alongside ambitious goals transitioning to low-carbon electricity by 2030 and achieving the highest sustained economic growth in the G7.

Transport plays an important role in this vision. Five strategic priorities covering improved performance on the rail and bus networks, tackling regional inequality, promoting social mobility, delivering greener transport and improving integration across transport networks were announced by the government in the summer.

New legislation on transport delivery coupled with comprehensive devolution plans for local government, signals a period of significant change and opportunity. At TfSE we are ready to meet these challenges and opportunities head-on.

The government's transport priorities align closely with our own, reinforcing the strategic direction we have taken since our formation in 2017, and will continue in 2025.

We want transport to attract investment and drive sustainable economic growth throughout the South East. Furthermore, we need to improve connectivity for communities as well as prioritising a transition to net zero carbon emissions by 2050.

Collaboration is at the core of our work. In December 2024, we launched a public consultation on our evidence-based draft Transport Strategy—a bold vision for the South East's transport infrastructure and services in the decades ahead.

This strategy outlines how transport can be a catalyst for economic growth, stronger communities, and a greener environment. Through the consultation, we will engage local users, businesses and stakeholders to inform and shape a strategy that reflects the diverse needs of the region, which we will publish by the end of 2025.

Empowering local leaders and fostering collaboration is central to the government's approach to transport provision. However, these are testing times. Rising costs and financial pressures demand value-for-money solutions that will benefit households and businesses alike.

MOVING EVEN FURTHER FORWARD

RUPERT CLUBB, CHIEF OFFICER

Supporting LTAs to meet these challenges is a cornerstone of TfSE's work. Our Centre of Excellence, which we launched in 2024, has been created to enhance the capabilities of local transport authorities, helping them to deliver innovative approaches to local transport.

The outcome — improved infrastructure, greater investment, and better outcomes for residents and businesses – will see benefits right across the region.

Our success is built on strong partnerships. From providing strategic advice on freight logistics and EVCI to ensuring the South East's transport priorities are heard at the national level, TfSE works hand-in-hand with regional leaders, MPs, and other key stakeholders.

Only by coming together with our local authority partners and stakeholders can we meet today's challenges and address the opportunities of tomorrow, as we strive to create a transport system fit for the decades ahead.

Rupert Clubb

APPENDIX 1

FULL BREAKDOWN OF TFSE FUNDING BY WORK AREA

Income	£
DfT Grant	2,065,000
Local Contributions	498,000
Technical Programme Carry Forward 2024/25 (Estimated)	528,435
Carry Forward for TfSE Reserve	406,730
Total Income Including Reserve	3,498,165

Expenditure	£
Staffing	1,250,0000
Technical Programme for 2025/26	1,025,000
Completing 2024/25 tech programme	528,435
Governance	25,000
Operational Expenses	75,000
Communications and Engagement	98,000
TfSE Reserve	496,730
Total Expenditure Including Reserves	3,498,165

APPENDIX 1

Work Programme for 2025/26 and allocation of DfT grant to individual work areas

Budget Line	Expenditure	DfT Grant
Staffing	**1,250,000**	**992,000**
Transport Strategy	141,000	40,000
Future Mobility	40,000	40,000
Active Travel	45,000	45,000
Freight	115,000	115,000
Electric Vehicle Infrastructure	90,000	45,000
Rail	75,000	75,000
Decarbonisation	40,000	0
Strategic Investment Plan Implementation	304,435	150,000
Strategic Investment Plan Refresh	98,000	50,000
Analytical Framework	285,000	265,000
Centre of Excellence	170,000	50,000
Other costs and technical support	150,000	150,000

APPENDIX 1

Work Programme for 2025/26 and allocation of DfT grant to individual work areas cont...

Technical Programme	£1,553,435	£1,025,000
Events	40,000	15,000
Communications	12,000	5,000
Publications	5,000	0
Website	21,000	0
Stakeholder Database	18,000	0
Media Subscriptions	2,000	0
Communications/ Engagement	98,000	20,000
TfSE Governance	25,000	0
Operational Expenses	75,000	28,000
Total Expenditure	3,001,435	2,065,000
Held for TfSE reserve	496,730	
Total budget including reserve	3,498,165	

APPENDIX 1

Technical Programme Breakdown

New funding for 2025/26

This table shows how the £1,025,000 of new DfT funding for our technical programme will be spent.

Expenditure	£
Transport Strategy	40,000
Future Mobility	40,000
Active Travel	45,000
Freight	115,000
Electric Vehicle Infrastructure	45,000
Rail	75,000
Strategic Investment Plan Implementation	150,000
Strategic Investment Plan Refresh	50,000
Analytical Framework	265,000
Centre of Excellence	50,000
Other Costs and Technical Support	150,000
Total	1,025,000

We set out what we deliver for each workstream in **section 5 : What we will deliver in 2025/26**

APPENDIX 1

Funding from 2024/25

We also have a carry forward that is currently forecast to come in at £528,435.

£211,000 of that funding has already been committed in our Business Plan for 2024/25 – and will be spent as follows:

Committed Carry Forward	
Expenditure	**£**
Transport Strategy	**101,000**
Analytical Framework	**20,000**
Decarbonisation	**40,000**
SIP Implementation ***Supporting Kent-Gatwick Strategic Outline Business Case (SOBC)***	**50,000**
Sub-Total	**211,000**

APPENDIX 1

We also estimate £317,435 of additional uncommitted carry forward, that is because of cost savings elsewhere in our 2024/25 Business Plan.

This will be spent as follows, subject to Partnership Board approval.

Uncommitted Carry Forward (subject to a Partnership Board decision)	
Electric Vehicle Charging ***Procuring the second version of the Electric Vehicle Charging Infrastructure tool***	**45,000**
Centre of Excellence ***Providing additional support to Local Authorities in 2025/26***	**120,000**
SIP Refresh ***Doing a more intensive version of the SIP refresh, allowing us to identify top schemes and build an evidence base on resilience***	**48,000**
Scheme Development ***Developing a funding and finance model for the A27 / M27 corridor, for submission to government***	**104,435**
Sub-Total	**317,435**
Total	**528,435**

Agenda item 7

Report to:	**Partnership Board –Transport for the South East**
Date of meeting:	**27 January 2025**
By:	**Chief Officer, Transport for the South East**
Title of report:	**Technical Call Off Contract – Third Year Extension**
Purpose of report:	**To update the Partnership Board on the performance of Transport for the South East's Technical Call-off Contract, and to propose that the contract be extended for a third year to July 2026.**

RECOMMENDATIONS:

The members of the Partnership Board are recommended to:

1) **note the performance of the technical call off contract with the Steer consortium; and the ongoing need for support to deliver the technical programme; and**
2) **approve the allowed for extension of the current technical call off contract for a third year until July 2026.**

---

1. Introduction

1.1 The purpose of this report is to update the Partnership Board on the performance of Transport for the South East's (TfSE) technical call off contract, and to propose that the contract be extended for a third year to July 2026.

2. Background

2.1 As set out in our business plans, TfSE has an ambitious and evolving technical work programme. The range and scale of work to be delivered is diverse and specialist advice and technical support is required from consultants to support its delivery.

2.2 In March 2023 the Partnership Board agreed that a technical call off contract was required and delegated to the Chief Officer responsibility to undertake a procurement exercise to commission a supplier to deliver technical support for TfSE work programme (previously each work element had been commissioned separately).

2.3 Following that procurement exercise, at their meeting in July 2023, the Partnership Board awarded a technical call off contract to a consortium of Steer (as lead bidder) and their supply chain partners (including Atkins, Arup and City Science). This contract currently runs from July 24th 2023 - July 23rd 2025, and contains an option

to extend to a third year to July 2026. The value of the initial two year term is up to £4m, with a possible additional £2m for a third year (subject to Department for Transport funding).

2.4 With the end of the current contract term approaching, a decision is needed on whether to extend the current contract, or whether to re-procure a new contract. To help inform this decision, TfSE officers carried out a contract review.

2.5 As per the TfSE constitution (part 3, section 16, 16.1, e), TfSE will not delegate (to the Chief Officer) the function of awarding contracts in excess of the threshold for goods and services set out in the Public Contracts Regulations 2015. (This is for any spend over £213,477). The value of the potential contract extension is over this threshold, and having previously agreed to award the contract, the Partnership Board are invited to agree the recommendation that the current contract should be extended.

3. Contract review

3.1 To help inform considerations TfSE Officers carried out a contract review in December 2024. This involved all TfSE officers who have projects that have been, or currently are, delivered through the call off contract.

3.2 The technical call off contract has been in place since July 2023, and in this time 36 tasks have been commissioned, with a total value of £2,003,374.25. Work is commissioned via TfSE preparing a task order setting out what is required, to which the Steer consortium respond with a task proposal detailing their methodology, costs, timescales and risks to delivery. This is a collaborative process and there is the opportunity to use the supply chain knowledge and experience to scope the work and shape task orders before a task proposal is prepared and agreed. This is particularly helpful when the work being undertaken is outside the direct experience of the TfSE team or is of a more innovative nature. If necessary or beneficial, this also allows for specialist input to be sought from the supply chain partners.

3.3 Prior to the technical call off contract being in place, each element of technical work had to be commissioned separately. As set out in the reports to the Partnership Board in March and July 2023, with the growing TfSE technical programme increasing amounts of time and resource were involved in running many separate procurement processes, and the technical call off contract was intended to ease that resource pressure through a more cost efficient, streamlined process.

3.4 The call off contract has been very successful in this endeavour, to the extent that the volume of work that has been completed would have been impossible to procure had the call off contract not been in place. The streamlined process ensures our limited resources are more focussed towards delivery, also provides the ability to commission work swiftly to respond to changing circumstances or asks from government.

3.5 Whilst the technical call off contract has facilitated the completion of a greater amount of the technical work, it has also enabled us to deliver against our budget in a more timely manner, and to reduce the amount of funding needing to be carried forward into next financial year.

3.6 The time and resource savings in procuring work have not only generated efficiency for TfSE , but also eased the pressure on the accountable body's procurement and sourcing solutions teams, who would be called on to support any procurement activities we undertake.

3.7 The contract is managed at both an individual project and overall programme or framework, level. Individual project management focuses on technical content and direct stakeholder engagement, whilst the framework management office ensures the work is managed as a cohesive programme (with consistency in approach and methodology) and leads on contractual and risk matters. This framework oversight ensures the most efficient use of resources and provides opportunity to shape and adapt the overall TfSE technical programme to best meet our desired outcomes. It also ensures that the resulting work lands correctly within the wider policy landscape in which Sub national Transport Bodies (STB's) operate.

3.8 Quality audits are carried out on individual projects, ensuring that agreed processes are being followed, with best practice and lessons learned shared amongst the whole team to continually improve the delivery of our work programme.

3.9 To ensure continued value for money each task proposal is agreed by TfSE officers before work commences and this includes the costs, programme and deliverables. The rates charged are set through the ESPO Framework through which the call off contract was tendered, and benchmarking is carried out to compare the costs against other similar work.

3.10 Social value was a key part of the tender process and thus far Steer and their supply chain have delivered £82,000 of social value across the TfSE region, including directly employing staff within the region, providing work experience opportunities, attending STEM and careers fairs, and offering professional advice and training to local organisations. Further social value offerings are planned for the remainder of the contract.

3.11 The contract contains an option for a possible extension into a third year from July 2025 to July 2026.

3.12 Having the technical call off contract in place has been hugely beneficial to delivery of the TfSE work programme and business plan, both in terms of the volume of work that it has been possible to complete, and the more efficient manner in which that has been done.

4. Future requirements

4.1 As set out in our business plan for 2025/26, TfSE continue to have an ambitious work programme, and will continue to require specialist advice and technical support from consultants to support its delivery.

4.2 In order to deliver this work programme the options for either re-procuring a new framework provider or tendering each work task separately have been discounted on the grounds of cost and resource efficiency. The rationale set out in the 2023 Partnership Board paper which sought agreement to the framework approach still apply.

4.3 The existing contract contains provision for an extension into a third year. The current contract is performing well. Measures are in place to effectively manage the contract framework and work programme, ensuring value for money, and the delivery of high quality outputs. Extending the contract for the third year would provide an efficient means of delivering the technical work programme, maximising the knowledge and experience gained from the operation of the contract thus far.

5. Conclusion

5.1 As set out in our business plan for 2025/26, TfSE continue to have an ambitious work programme, and will continue to require specialist advice and technical support from consultants to support its delivery. The current contract is performing well and contains provision for a one year extension to the original two year term. Extending the current contract would provide an efficient means of continuing to deliver the technical work programme, maximising the knowledge and experience gained from the operation of the technical call off contract.

5.2 Subject to the Partnership Board's agreement, the contract extension will be undertaken within the rules and parameters set out by the procurement team at East Sussex County Council as the accountable body.

5.3 The extended term would commence immediately following the close of the original two year term on 24th July 2025 and run until 23rd July 2026.

5.4 Prior to the extended contract expiring, in early 2026, proposals for future provision of technical support would be brought to the Partnership Board for their consideration.

6. Recommendation

6.1 The Partnership Board recommended to note the performance of the technical call off contract with the Steer consortium, and the ongoing need for support to deliver the technical programme.

6.2 The Partnership Board are further recommended to approve the allowed for extension of the current technical call off contract for a third year until July 2026.

RUPERT CLUBB
Chief Officer
Transport for the South East

Contact Officer: Sarah Valentine
Email: sarah.valentine@transportforthesoutheast.org.uk

Agenda Item 8

Report to:	**Partnership Board – Transport for the South East**
Date of meeting:	**27 January 2025**
By:	**Chief Officer, Transport for the South East**
Title of report:	**Electric Vehicle Charging Infrastructure – impact of the electrification of commercial vehicle fleets**
Purpose of report:	**To agree the report on the impacts of the electrification of commercial vehicle fleets on charge point demand**

RECOMMENDATIONS:

The members of the Partnership Board are recommended to:

1) **Note the report on the impacts of the electrification of commercial vehicle fleets on the demand for public charge points;**

2) **Note this report followed a request from the DfT's Office of Zero Emission Vehicles (OZEV); and**

3) **Agree to explore the opportunity to obtain additional Dft funding to enable this approach to be replicated across the STB network to provide a consistent approach across England.**

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1. Introduction

1.1 The purpose of this report is to ask the members of the Partnership Board to agree the report on the impacts of the electrification of commercial vehicle fleets on the demand for electric vehicle (EV) charge points.

2. Background

2.1 In March 2022, the Government published a national electric vehicle infrastructure strategy[1]. This set out the Government's vision and action plan for the rollout of electric vehicle charging infrastructure in the UK, ahead of the end of the sale of new petrol and diesel vehicles. This national strategy set a particular task for sub-national transport bodies (STBs) which was to bring together data on the current and future demand for charge points resulting from the electrification of fleet vehicles operating within their respective areas.

[1] Taking Charge; the electric vehicle infrastructure strategy, HM Government, March 2022

2.2 In March 2023, the Partnership Board approved Transport for the South East's (TfSE) regional electric vehicle charging infrastructure (EVCI) strategy. Following on from the publication of the strategy, work is now underway to implement the action plan that formed part of the strategy. This has included work to understand the potential impacts of the electrification of vehicle fleets on the demand for EV charging infrastructure, with Steer consultants being appointed to undertake the work through the call off contract.

3. Challenges associated with the electrification of commercial vehicle fleets

3.1 While passenger cars have been making good progress in the transition to electric vehicles (EVs), the progress amongst light and heavy duty commercial vehicles and fleets has been much slower. Although commercial vehicles comprise only around 15% of the total fleet, they make up 26% of the miles driven and 42% of greenhouse gas emissions. As a consequence, when the total fleet is fully electrified, it is anticipated commercial vehicles will consume half of the total electricity demand from all types of EVs.

3.2 Fleet operators and the industry's representative bodies highlight the fact that a large proportion of commercial vehicle operators are not ready to embrace EVs. This is because the way that many of these commercial vehicles are utilised means there charging requirements cannot always be met from either private depot or home charging. For example, vehicles delivering and collecting parcels to residential or business premises throughout may require access to public EV charge points when completing their rounds. This means that access to a public charging network that can accommodate larger size vehicles and their more stringent charging requirements will be needed if uptake if the electrification commercial vehicles is to be encouraged. It is also the case that, private investors will not consider investing in the charging resources needed without a robust understanding of where the demand will come from that will drive return on their investment.

4. Development of forecasts to assess the impacts of the electrification vehicle fleets on charge point demand

4.1 The objectives of the TfSE's study were as follows:

- Develop a methodology for forecasting the emerging demand for both energy and EVCI arising from the electrification of commercial vehicle fleets;
- Focus analysis and methodology development on the segments of the vehicle fleet that are likely to electrify and need charging infrastructure soonest;
- Base the forecasting methodology wherever possible on publicly available data so as to facilitate rollout of the method to all STBs; and
- Apply the methodology to forecast demand across the TfSE region and present results within the EVCI Visualiser tool developed by Transport for the North (TfN).

4.2 Effective stakeholder engagement has been fundamental in helping to shape the development of the project. A Fleet Electrification Working Group was formed to help oversee the development of the work. This provided the mechanism for local transport authorities and fleet trade bodies to 'check and challenge' the project's findings. The project team also conducted targeted one-to-one engagement with a selection of industry/trade bodies, local and national government and other key stakeholders such as electricity network operators and vehicle and charging solution providers.

4.3 A copy of the methodology and initial findings from this forecasting activity on the future demand from fleet vehicles on a publicly available charging network is contained in **Appendix 1**. The forecasting outputs for each local transport authority can be accessed via the EVCI Visualiser tool developed by TfN, which has been mounted on TfSE's Centre of Excellence platform. It is hoped that it will be possible to produce similar forecasts for each of the other STBs in 2025-6 but this will require additional resources from the DfT to fund this work.

4.4 The forecasts that have been developed as part of the work have served to demonstrate the role of public bodies like TfSE in breaking the impasse that inhibits EV uptake by commercial vehicle operators and prevents private sector investment in the EVCI needed to meet demand.

5. Further work

5.1 Following on from this initial pioneering piece of work, TfSE has recently commenced a follow-on project, which aims to develop a guidance framework for local transport authorities to support them with planning the roll out of EV charging infrastructure that will be more accessible to commercial fleet vehicles. This will include the development of case studies in Slough Borough Council and Brighton and Hove City Council. This task was started in December 2024 and is expected to be completed in May 2025. A further update on this follow on piece of work will be provided at the March meeting of TfSE's Partnership Board.

6. Financial considerations

6.1 The total cost of TfSE's pioneering piece of work into the impacts that fleet vehicles could have on a future publicly available charging network was £91,839. The second phase of this work which looks to develop a guidance framework for local transport authorities to utilise in order to support them with planning EV charging infrastructure that will be more accessible for commercial fleet vehicles within their respective regions will cost £36,475. These cost are being met form the DfT grant funding awarded to TfSE for 2024-5.

7. Conclusions and recommendations

7.1 A report on the on the impacts of the electrification of commercial vehicle fleets on the demand for public charge points has been produced in response to a request

form OZEV. This work has served to demonstrate the role of public bodies like TfSE in breaking the impasse that inhibits EV uptake by commercial vehicle operators and prevents private sector investment in the infrastructure needed to meet demand. Members of the Partnership Board are recommended to agree that the opportunity to obtain additional DfT funding to enable this approach to be replicated across the STB network to provide a consistent approach across England should be explored.

RUPERT CLUBB
Chief Officer
Transport for the South East

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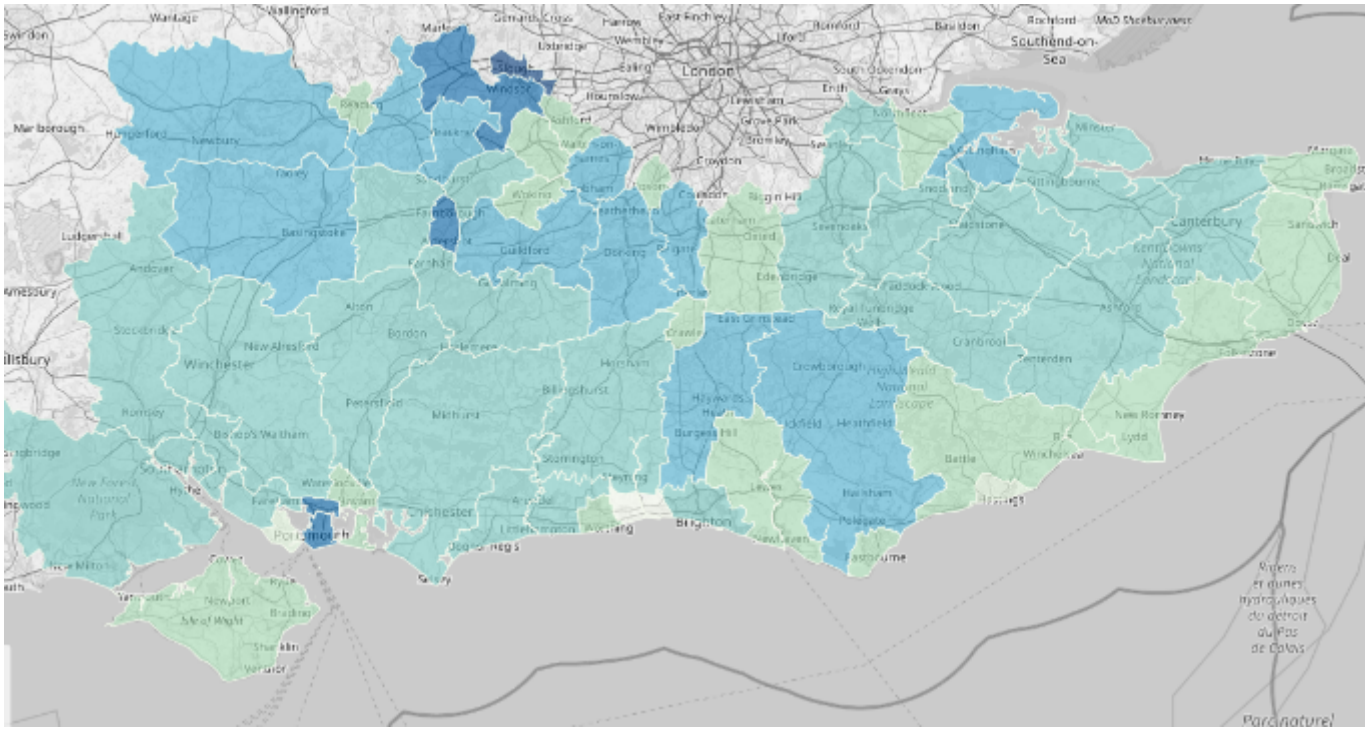
Appendix 1

November 2024

TfSE EVCI Fleet Forecasting Methodology



Transport for the South East
Our ref: 24559702

steer

Report
November 2024

TfSE EVCI Fleet Forecasting Methodology

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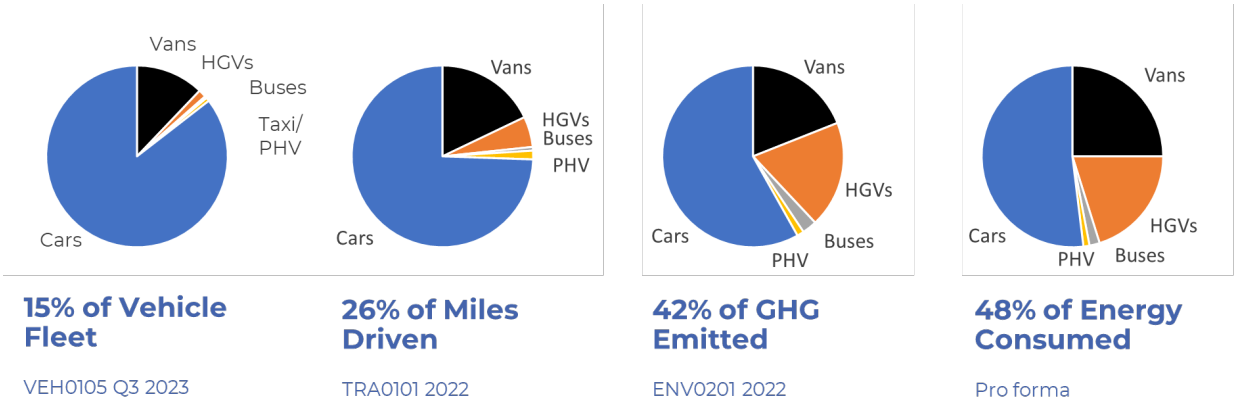
Background

To achieve its commitment of reaching net zero by 2050, the UK must address the decarbonisation of its transport sector. According to the UK's Transport and Environment Statistics report, transport accounts for around 26% of the UK's total greenhouse gas emissions (GHG) and road vehicles account for 91% of emissions from transport.[1]

While passenger cars have made some progress in their transition to the electric vehicles (EV) paradigm, the decarbonisation of commercial vehicles is lagging behind. As reflected in Figure 1, commercial vehicles comprise only around 15% of the total fleet, however they reflect 26% of the miles driven and 42% of the GHG emissions. When the total fleet is fully electrified, commercial vehicles are anticipated to consume half of the electricity demanded from EVs.

Figure 1: Comparison of cars (mostly private) to commercial vehicle segments.



The penetration of EVs within commercial vehicles is far less than that of private cars. Fleet operators and the industry's representative bodies indicate that a large proportion of commercial vehicles are not ready to embrace EVs. This is because the use cases by which they satisfy their customers do not always allow for private depot or home charging. An electric commercial fleet will depend on access to a public charging network that can accommodate their larger size and more stringent charging requirements.

In contrast, investors cannot consider investment in required charging resources without a robust understanding of where the demand will come from that will drive return on investment.

The UK Government's Electric Vehicle Infrastructure Strategy provided reference to the role which sub-national transport bodies (STBs) should play in supporting local authorities and energy system stakeholders in planning charging infrastructure provision. The Strategy explicitly indicates a requirement for STBs to forecast charging infrastructure demand from vehicle fleets across their respective regions.

In satisfying its obligation under the Government's EVI Strategy, Transport for the South East, the STB representing 16 Local Transport Authorities across the South East, has identified a critical role for the public sector in breaking this impasse between demand and supply by addressing anticipated

[1] Transport and environment statistics: 2023 - GOV.UK (www.gov.uk)

demand for energy and charging infrastructure arising from the adoption of EVs by commercial fleet operators.

Throughout the development of this methodology the project team has held workshops with a TfSE Fleet Electrification Working Group that was convened to help steer the study. The project team conducted further, targeted one-to-one engagement with a selection of industry/trade bodies, local and national government and other key stakeholders such as electricity network operators and vehicle and charging solution providers (some members of the Working Group and others not).

The aims of the commission were to:

- Develop a methodology for forecasting the emerging demand for both energy and electric vehicle charging infrastructure (EVCI) arising from the electrification of commercial vehicles,
- Focus analysis and methodology development on the vehicle segments that are likely to electrify and need charging infrastructure soonest,
- Base such forecasting methodology wherever possible on publicly available data so as to facilitate rollout of the method to all STBs, and
- Apply the methodology to forecast demand across the TfSE region at a Local Authority (LA) and MSOA level and present results within the EVCI framework tool developed by Transport for the North (TfN).

The results of the commission are intended to provide data inputs facilitating the development of EVCI projects that both serve the demand of commercial fleet drivers and yield to attract investment. In summary, this process demonstrates the role of public entities like TfSE in breaking the impasse that inhibits EV uptake by commercial vehicle operators and prevents private investors from identifying commercially viable levels of demand.

The body of this report details the methodology behind the forecasts for commercial fleet electrification and the related energy and charging infrastructure demand.

Overview of Forecast Methodology

There are three broad steps in the forecasting process as follows:

1. *Baseline:* review historical data to define the current state of EV penetration within commercial vehicles as well as the trends leading to the present:
   - Vehicles entering the fleet: new vehicle registrations are assessed by fuel type.
   - Vehicles leaving the fleet: vehicle turnover is calculated based on the change in the number of vehicles from the previous year, less any new additions, this also gives the estimated, indicative useful life of vehicles for the forecast.
   - Actual operating locations of vehicles: census data on population car and van availability by MSOA is used to reproportion the fleet based on where it is used rather than where it is registered (a large number of cars and vans are registered to leasing companies' headquarters).

   With the analysis of these datasets the size of fleet is forecasted to 2050 at the LA and MSOA levels.

2. *Forecast EV adoption:* the EV penetration is forecast to grow as a function of the ZEV mandate for new vehicle sales (or other public commitments and regulations) and based on the vehicle turnover rates identified.

   With this analysis the number of EVs is forecasted to 2050 at the LA and MSOA levels.

3. *Conversion of EV adoption into Energy and Infrastructure Demand Forecast:* the EV numbers together with average mileages by fleet segment and typical vehicle efficiency create the annual energy demand forecasts by LA and MSOA. Charging demand forecasts are then derived by estimating where charging will occur (across up to five charging categories) and matching these locations with utilisation metrics for different charging power levels.

A closer look at the methodology by vehicle class is outlined next.

Forecast by Vehicle Class Overview

Taxis and PHVs

In the absence of any LA specific licensing rules for zero emission taxis/PHVs, this vehicle class is forecasted to electrify along with the ZEV mandate indicated trajectory for cars. The EV and charging energy demand forecasts for this commercial vehicle segment are included and masked among passenger cars in other national forecasts (including the STB EVCI Framework tool), however taxis and PHVs need to recharge more regularly and potentially using a broader mix of charging types. TfSE have published the taxi/PHV taxi numbers and energy demand forecasts separate to the STB EVCI Framework visualiser to avoid confusion and to support any stakeholders looking to understand the potential uptake of electric taxis/PHVs and the associated energy demand.

Vans

Vans are the vehicle class likely to electrify next after cars. Where, when and how electrification happens (the charging paradigms) depend on the vehicle use case. Tying the use case to the industry sector and business size within which the vans operate is beneficial as there is a national ONS dataset with business data by local authority. This business data is also a much better representation of where vans are kept and operate than DfT vehicle registration data which is skewed by leasing company registrations. Using the business dataset with assumptions on the number of vans per head/per company the van fleet is split into 119 van segments for each Local Authority. Each segment represents the vans operating in one of 17 industry groups in a business that has one of 7 employee size bands. Each segment is characterised by its:

- Relative propensity to transition to EVs (relative to ZEV mandate),
- Relative average annual mileage,
- Charging category access/preference and demand.

The assumptions used to characterise the segments are based on van research undertaken in small and medium enterprises (SMEs), and analysis of van telematics data from larger companies, this segmentation approach allows for more accurate forecasting. Total van registrations are used to validate the assumptions and regional van numbers.

HGVs

The methodology for HGVs remains unchanged from that developed by TfN, full details can be found in their method statement. In summary HGV energy and chargepoint demand is split between HGV depots (80% of demand) and rapid en-route charging (20% of demand).

- HGV depots - are based on Element Energy's GB database of depot locations and fleet sizes,
- Rapid en-route charging – is summed for the whole major road network (MRN) and distributed to specific sites along the MRN considering various factors including the trip purpose, distance and origin and destination.

Buses

While the UK Government is considering a ban on the sale of non-zero emission buses by 2032, no decision has yet been made. In the meantime, penetration of e-buses in the public service fleet is being driven by commitments of the nation's five largest operators to operate fully zero emission bus fleets by 2035. These five operators manage the majority of public service buses in the UK and 55% of the buses in the TfSE area. Therefore:

- Distribution of buses across the region reflects operator licensing data showing the location of the depots (operating centres) and the number of buses stationed at each,
- Uptake of electric bus technology reflects the operators' 2035 commitment, and,
- Energy demand reflects average vehicle fuel efficiency and operational patterns (typical daily mileages).

Demand for chargers reflects only private bus depots where almost all charging is expected to occur.

Summary

Through the development of commercial fleet charging demand forecasts, this work supports STBs in satisfying the requirements of the UK Government's Electric Vehicle Infrastructure Strategy. This enables the public sector to provide information crucial to investors in identifying locations where charging demand will allow for return on investment, in turn facilitating the provision of infrastructure which will meet the charging requirements of the commercial users, promoting transition to an EV fleet.

Future Work

Due to the pioneering nature of this work and the early stage of EV uptake by commercial fleets, feedback from the TfSE Fleet Electrification Working Group (discussed below), indicates that sector stakeholders including local government authorities, commercial fleet operators and others would benefit from an annual update of the methodology and incorporated assumptions. Reviewing the latest government statistics will enable validation or recalibration of the forecasts. Advancements in both vehicle and charging technology as well as markets and the policy and regulation landscape could significantly impact the trajectory of the transition to EVs and the associated (regional) charging demand.

For example, our stakeholder engagement, including with the Confederation of Passenger Transport (CPT) early in 2024 determined that the majority of Coach operators are not seeing any viable eCoach models on the market (from a cost and/or mileage versus duty cycle perspective). As such there are virtually no eCoaches in operation. When the technology and costs make transition possible, forecasts can be developed and included, perhaps alongside HGVs as their duty cycles, routes and potential stop locations were deemed to be most similar according to the Fleet Electrification Working Group.

Other triggers for significant forecast updates could include:

- Enaction of the UK's consideration of a ban on the sale of non zero emission buses,
- Regulation on the part of Local Authorities to accelerate adoption of zero-emission taxi/PHV (like those enforced by TfL),
- Significant impacts to EV availability including those from escalating import tariff (e.g., European and Chinese originations, etc.) and others.

Glossary

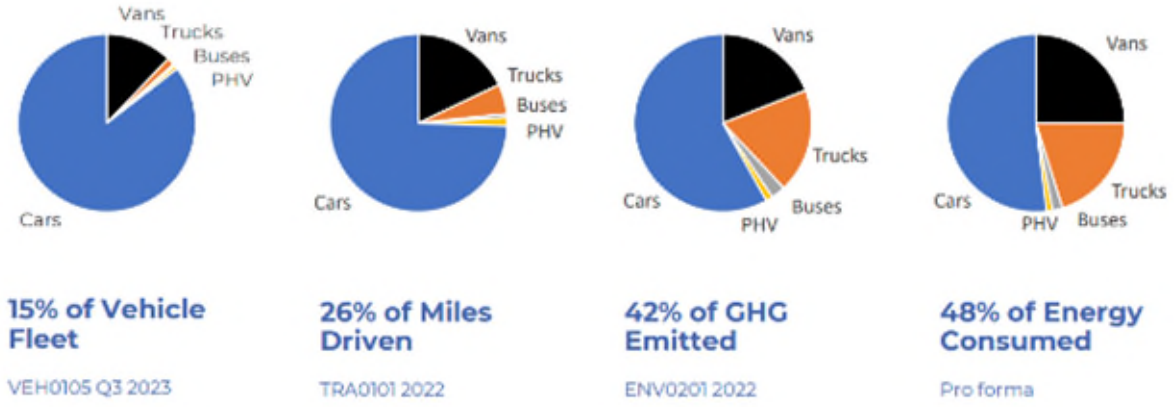
Business	Used interchangeably with 'enterprise' in this work.
Charging Category	Charging categories are defined by location type and include a definition on typical charging power e.g. home charging 7 kW, van depot charging average 25 kW.
CPT	Confederation of Passenger Transport
DfT	Department for Transport
EV	Electric Vehicle
EVCI	Electric Vehicle Charging Infrastructure
EVCP	Electric Vehicle Charge Point
ICE	Internal Combustion Engine
LA	Local Authority
LCV	Light Commercial Vehicle (van)
MRN	Major road network
MSOA	Middle layer Super Output Area
ONS	Office of National Statistics
PHV	Private Hire Vehicle
PiV	Plug-in Vehicle
Segment	In this work we refer to a segment as a group of vans characterised by the industry sector and size of business (based on employee numbers) that they operate in.
SERTM	South East Regional Transport Model
STB	Sub-national Transport Body
TfN	Transport for the North
TfSE	Transport for the South East
YoY	Year on Year
ZEV	Zero Emission Vehicle

1 Overview

Background

1.1 Decarbonisation of transport is a crucial component of the UK's commitment to reaching net zero by 2050. Transport is the largest emitting sector of greenhouse gas emissions in the UK producing around 26% of UK's total emissions and the majority, 91%, comes from road transport split approximately half from private vehicle and half from commercial vehicles.[2] While passenger cars have been making good progress in the transition to electric vehicles (EVs), light and heavy duty commercial vehicles and fleets need further support to decarbonise. While commercial vehicles are around 15% of the total fleet, they cover 26% of the miles driven and 42% of the GHG emissions (Figure 1-1). When the total fleet is fully electrified, commercial vehicles are anticipated to consume half of the electricity demanded from EVs.

Figure 1-1: Comparison of cars (mostly private) to commercial vehicle segments.



1.2 Commercial fleets cannot electrify without a mix of suitable charging infrastructure, and charging infrastructure cannot be invested in without a business case. Once the commercial vehicle fleet is electrified its energy demand is projected to represent half of all road transport energy demand.

1.3 This report details the methodology behind the forecasts for commercial fleet electrification and the charging infrastructure demand. The purpose of the commercial fleet forecasts is to provide the data inputs required (number of EVs, charging and energy demand over time and by location) for business cases developed to attract public and private investment. It is imperative for fleet operators and commercial vehicle drivers to see the development of commercially accessible public charging networks in their areas in order to have the confidence to switch to EVs.

Project Introduction

1.4 The UK Government's Electric Vehicle Infrastructure Strategy includes the funding of sub-national transport bodies (STBs) to support energy system stakeholders and local authorities in planning

[2] Transport and environment statistics: 2023 - GOV.UK (www.gov.uk)

charging infrastructure provision. The Strategy explicitly indicates a requirement for STBs to forecast charging infrastructure demand from vehicle fleets.

1.5 Transport for the South East (TfSE), the sub-national transport body (STB) representing 16 Local Transport Authorities (LTAs) across the South East commissioned this work to understand the trajectory of fleet electrification and the requisite charging demand across the region over time.

1.6 Throughout the development of the methodology the project team has held workshops and one-to-one engagement with TfSE Fleet Electrification Working Group, made up of:

Industry Bodies

- Association of Fleet Professionals
- British Vehicle Renting and Leasing Association
- Logistics UK
- Road Haulage Association
- Society of Motor Manufacturers & Traders
- Confederation of Passenger Transport

(Local/National) Government

- Department for Transport
- The constituent Local Authorities

Other Key Stakeholders

- Electricity Network Operators
- Transport for the North
- Van OEMs and charging solution providers

The broad scope of the commission was to:

- Develop a methodology for forecasting the emerging demand for both energy and electric vehicle charging infrastructure (EVCI) arising from the electrification of commercial vehicles,
- Focus analysis and methodology development on the vehicle segments that are likely to electrify and need charging infrastructure soonest,
- Base such forecasting methodology wherever possible on publicly available data so as to facilitate rollout of the method to all STBs and
- Apply the methodology in forecasting demand across the TfSE region at a Local Authority (LA) and MSOA level and present results within the EVCI framework tool developed by Transport for the North (TfN).

1.7 Results of the commission are intended to provide data inputs facilitating the development of EVCI projects that both serve the demand of commercial fleet drivers and yield to attract investment. In summary, this process demonstrates the roll of public entities like TfSE in breaking the impasse that inhibits EV uptake by commercial vehicle operators and obstructs private investors from identifying commercially viable levels of demand.

Structure of the Report

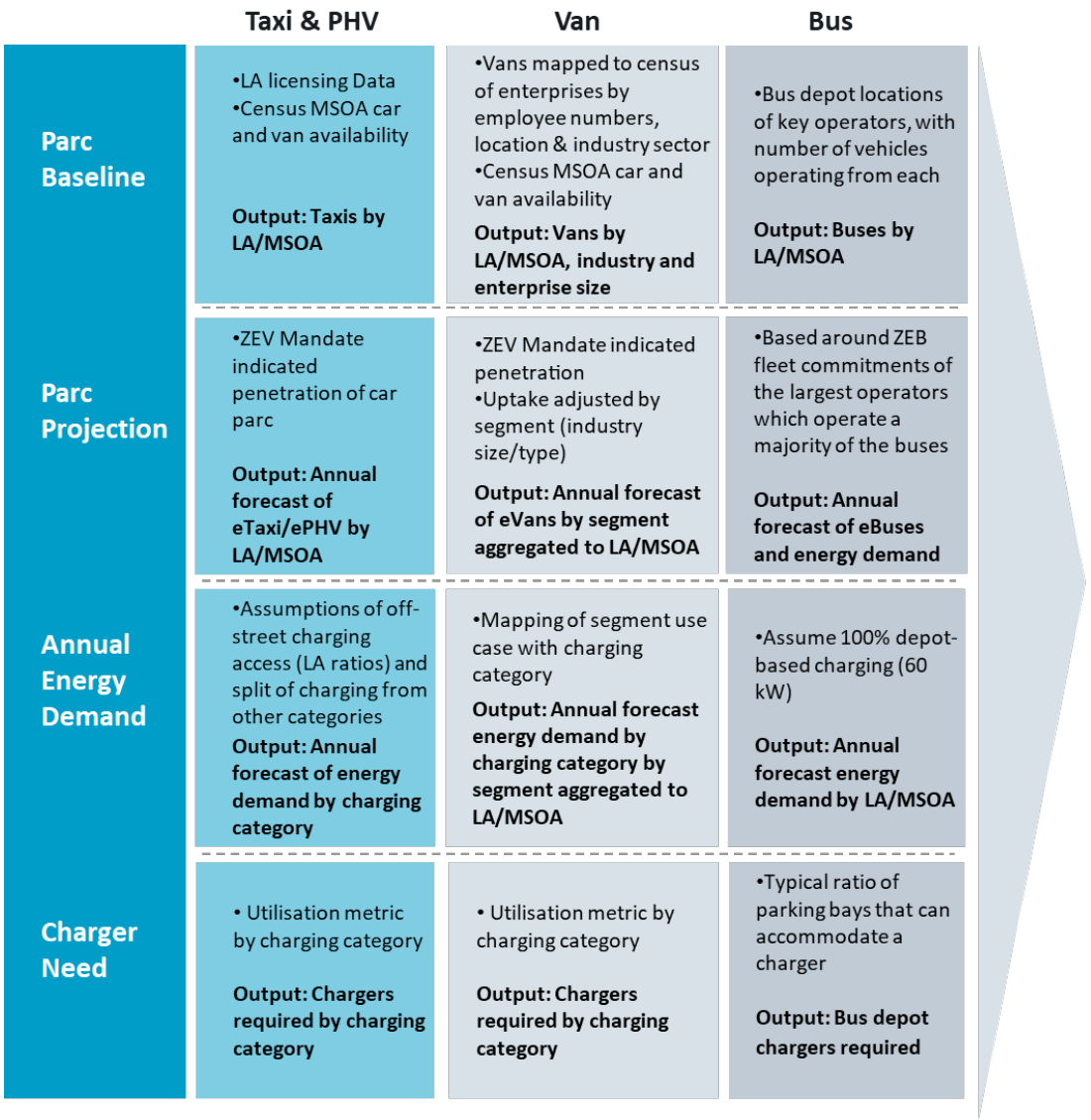
1.8 This report provides an overview of the process and data sources used to generate the fleet forecasts for TfSE. Section 2 describes the overall methodology applied across all the vehicle classes considered and talks about the interface to the STB EVCI Framework tool. Section 3 details the specific datasets and calculations made for each vehicle class. Finally, Section 4 describes the future work that will support the maintenance and development of the forecasts and its application for the development and rollout of EVI.

2 Fleet Forecast Introduction

Forecast overview

2.1 The below diagram gives an overview, by vehicle type, of the analysis undertaken and outputs developed at each stage of the methodology.

Figure 2-1: Overview of forecast by commercial vehicle type.



Source: Steer and Mitie Plan Zero

General Forecast Methodology

2.2 In general, to forecast the potential uptake of EVs into the UK vehicle fleet the following datasets are required:

- The number of new vehicles entering the fleet (Additions)
- The number of vehicles leaving the fleet (Deletions)
- The number of vehicles in the fleet

2.3 Additions (Total and Plug-in Vehicle (PiV)):

- DfT VEH1153a gives the number of vehicle additions at the UK level, split by fuel type.
- The ZEV mandate (for cars and vans) is used to calculate the % of future additions to the vehicle fleet that are PiVs[3].
- The ZEV mandate is then weighted based on the EV penetration rate in sales for the UK and the Local Authority. If the EV penetration in the Local Authority is below the UK average, then it is assumed that the % of future PiV additions will also be below the ZEV mandate.

2.4 Deletions (Total and PiV):

- Deletions are calculated based on the number of additions and the number of vehicles in the fleet in the UK:

$$Deletions_{2022} = Parc_{2022} - Parc_{2021} - Additions_{2022}$$

- From this, the average useful life of the fleet for each year is calculated:

$$Average\ Useful\ Life_{2022} = \frac{-Parc_{2021}}{Deletions_{2022}}$$

- It is assumed that the average useful life of a vehicle is the same as the UK average, in lieu of more granular data. Therefore, the number of deletions in each LA can be calculated.

2.5 The forecast number of vehicles in the fleet is therefore:

$$Parc_{2023} = Parc_{2022} + Additions_{2023} - Deletions_{2023}$$

2.6 Energy Demand is calculated based on the number of vehicles, average vehicle mileage and the average vehicle efficiency

$$Energy\ Demand_{Year} = EVs_{Year} \times Avg\ Vehicle\ Mileage \times Avg\ Vehicle\ Efficiency$$

2.7 Charging demand is calculated by splitting the energy demand based on the likely proportion of charging that will be done across each of the identified charging categories. The charging categories are characterised by typical charging powers, locations and target utilisation, e.g. 'public residential' charging is near home charging at 8 kW and with a utilisation of 6% in 2023 rising to 25% by 2035 (the full list of charging category power and utilisation assumptions are shown in Appendix B).

[3] Zero emission vehicle (ZEV) mandate consultation: summary of responses and joint government response - GOV.UK (www.gov.uk)

$$eLCV\ Public\ Residential\ Charger\ Demand_{Year} = elCV\ Energy\ Demand_{Year} \times Proportion\ of\ charging\ at\ Public\ Residential\ Chargers \div Annual\ Charger\ Energy\ Output$$

$$Annual\ Charger\ Energy\ Output = Average\ Power\ Rating\ of\ Charger \times 365.25\ days \times 24\ hours \times Target\ Utilisation\ \%$$

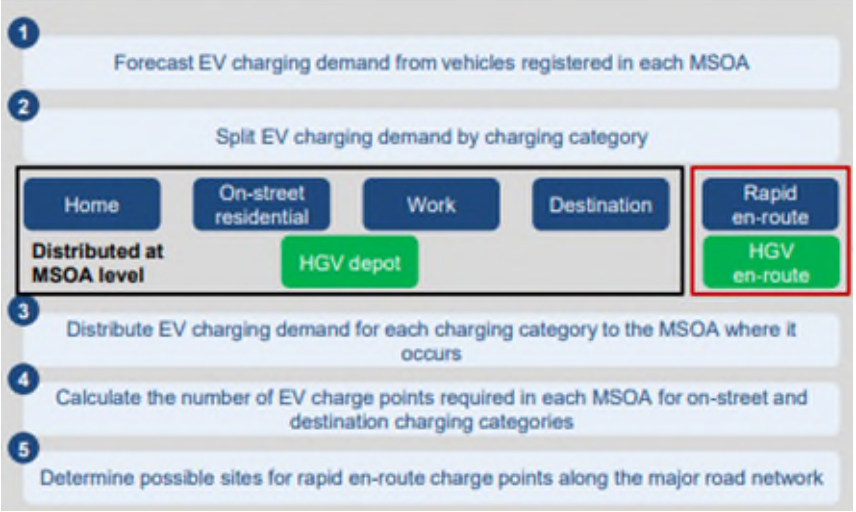
2.8 For at home charging, utilisation is not used to calculate charger numbers, instead for each vehicle that will use home charging one home charger is allocated.

2.9 A detailed methodology by vehicle type is described in the following chapter.

Interface with STB EVCI Framework Forecast Methodology

2.10 The Electric Vehicle Charging Infrastructure (EVCI) Framework developed by Transport for the North (TfN) uses inputs from a range of existing regional models to forecast EV charging infrastructure demand by LA and MSOA. It was initially developed to cover the TfN region, and the methodology has since been rolled out to cover the TfSE and other STB regions. An overview of the methodology is shown by the diagram below.

Figure 2-2: STB EVCI Framework: Methodology overview



Source: TfN

2.11 A key benefit of the STB EVCI Framework model methodology is the use of data from regional models to geographically locate charging demand. Origin-Destination (OD) trip matrices sourced from the regional transport models are used to distribute destination-based charging demand to the location of charging, based on trip patterns in the model. The STB EVCI Framework model further includes a tool to identify locations on the major road network suitable for en-route rapid chargers, based on the modelled trip routes and trip distances.

2.12 To benefit from the body of work developed by TfN, including the publicly accessible visual user interface, the fleet forecasts developed have been integrated with the EVCI framework tool.

2.13 We have used detailed data at a disaggregate level to further develop the van fleet forecast and expand the tool to include bus charging infrastructure requirements. There have been no changes made to HGV or car forecasts.

2.14 A full statement of methodology for the STB EVCI Framework model can be found online[4].

[4] https://www.transportforthenorth.com/reports/electric-vehicle-charging-infrastructure-evci-model-statement-of-methodology/

3 Forecast Methodology by Vehicle Type

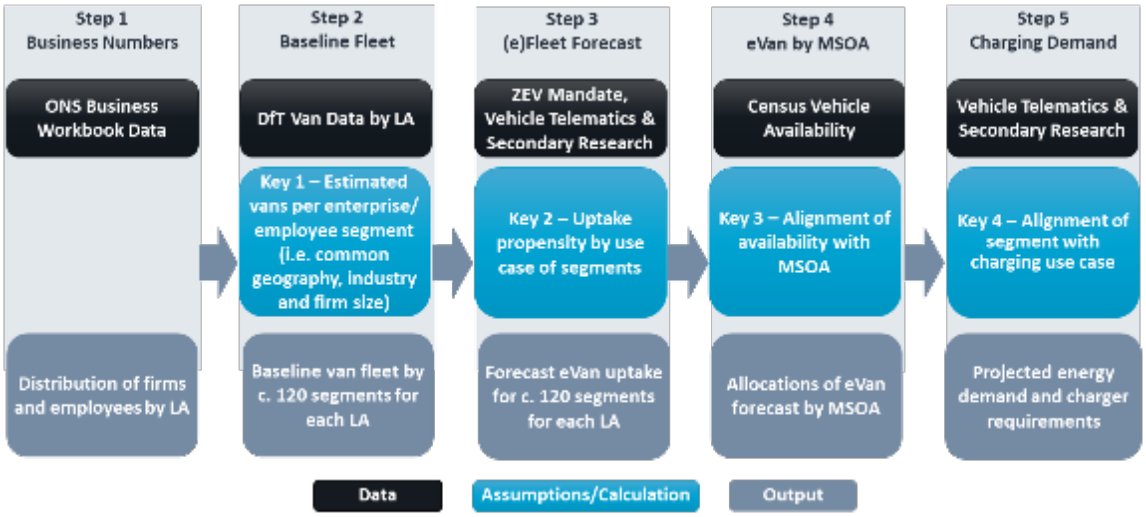
Vans

3.1 After cars, vans represent the vehicle class that will electrify soonest and demand the most energy for charging. (As shown in the pie charts in Figure 1-1, vans are the vehicle class which represent the second largest energy demand when fully electrified). To support the planning of charging infrastructure for this vehicle class use case segmentation is used to derive more accurate forecasts.

3.2 The chosen method of segmentation is based on publicly available datasets about the businesses in each area (numbers, sizes (number of employees), types of industry). This data is used to estimate the number of vehicles per business/employee in each LA.

3.3 Assumptions on EV uptake, mileage, charging behaviour and vehicle efficiency are then applied to calculate the associated energy demand and charger requirements for each segment. An overview of the van forecast methodology is shown in the figure below and these steps are described in more detail in the following text.

Figure 3-1: Van forecast methodology overview



Source: Steer & Mitie Plan Zero

Pre-step: Calculating the number of businesses across the TfSE region

3.4 Data from the ONS UK Business Workbook 2023 (uploaded on 27 September 2023) provides independent census information on UK businesses broken down by legal status, industry, region, employment size, and turnover size bands[5].

3.5 This business information is deemed to be a more accurate reflection of business activity, and therefore vehicle usage across the UK than DfT vehicle registration data. This is because of the high number of vans that are registered in one location to a leasing company, but used in a different location by the business who is leasing and operating the vehicle.

3.6 The following data tables, from this data set, are used to calculate the number of businesses (enterprises) within specific Industry Groups (SIC Division) and employment size bands across the South East:

- Table 1: Number of VAT and/or PAYE based enterprises in districts, counties and unitary authorities within regions and country by broad industry group
- Table 3: Number of VAT and/or PAYE based enterprises within regions by Standard Industrial Classification (SIC) division, employment size bands and region

3.7 Data on Enterprises was used rather than Local Units as this provided a truer reflection of business locations across the UK. An Enterprise is an organisational unit producing goods or services while a Local Unit is an individual site (for example a factory or shop) within an Enterprise.

3.8 The analysis results are then used to further segment Enterprise numbers across the total Transport for the South East (TfSE) region, as a proportion of Enterprises and Employment Size bands across TfSE local authorities.

3.9 The following Standard Industry Classification (SIC) Divisions are used to group businesses into distinct Industry Groupings as in Table 3-1.

Table 3-1: Industry Groupings used for van segmentation.

Industry Groupings		
Agriculture, forestry & fishing	Production	Construction
Motor trades	Wholesale	Retail
Transport & storage (inc postal)	Accommodation & food services	Information & communication
Finance & insurance	Property	Professional, scientific & technical
Business administration and support services	Public administration & defence	Education
Health	Arts, entertainment, recreation	

[5] https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/datasets/ukbusinessactivitysizeandlocation

Baseline and Forecast of Vans

3.10 Using assumptions on the number of vans used within different Industry Groups and employment size bands, the number of vans in use across the South East is calculated. The assumptions used were generated based on:

- industry knowledge and understanding of van operations within different industry group,
- information gathered via the Fleet Electrification Working Group discussions,
- information gathered through Mitie Plan Zero fleet consultancy projects,
- gathered research materials (e.g. UKPN White Van Plan, DfT Van Statistics).

3.11 The generated van numbers are calculated at a UK level first, adjusted to reflect the total number of licenced vans in the UK, as recorded in VEH0105 (updated 12 December 2023)[6]; The van distribution calculations are undertaken at the UK level to mitigate the impact of leasing company licensing/ registrations processes.

3.12 The results generated from the above analysis are then used to calculate the potential number of vans in use across the TfSE local authorities.

3.13 As the generated van numbers have been calculated to match the UK level, the forecasted YoY growth rate of vans at UK level has been used.

- From 2021 to 2022, the YoY growth rate for vans in the UK was 1.9%, although this is likely to have been negatively impacted by vehicle supply shortages in the COVID-19 pandemic, with longer term growth rates higher.
- The forecast growth rate decreases yearly at a linear rate to 0% by 2050, as presented in Table 3-2.
- We forecast that all vans, regardless of industry type, business size or geography, will follow this this trend.

Table 3-2: Forecasted UK YoY growth rate of vans

2025	2030	2035	2040	2045	2050
2.8%	2.2%	1.7%	1.1%	0.6%	0%

Baseline and Forecast of eVans

3.14 In 2022, eVans made up around 1% of the UK's total van fleet. From this baseline figure, the penetration of eVans reflects the ZEV mandate shown in Table 3-3.

Table 3-3: ZEV Mandate, % of newly manufactured vans that are required to be ZEVs.

2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
10%	19%	22%	35%	46%	58%	70%	76%	82%	88%	94%	100%

3.15 Using assumptions on the relative potential uptake of eVans within different Industry Groups and employment size bands, and the useful lifespan of company vehicles, the adjusted

[6] https://www.gov.uk/government/statistical-data-sets/vehicle-licensing-statistics-data-tables.

estimated uptake of eVans was calculated. For each Industry Group (and employment size band) assumptions are applied as to whether EV uptake would be:

- 20% slower than ZEV mandate (0.80)
- As per ZEV mandate (1.0)
- 10% quicker than ZEV mandate (1.10)

3.16 The uptake assumptions (shown in full in Appendix A) used are generated based on:

- Industry knowledge and understanding of van operations within different industry groups,
- Information gathered via the Fleet Electrification Working group workshop discussions,
- Information gathered through Mitie Plan Zero fleet consultancy projects and
- Notable research (e.g. UKPN White Van Plan, DfT Van Statistics)

3.17 Useful life reflects the average age at which vehicles are "scrapped" out of the national fleet. As a proxy, we estimate useful life as the proportion of scrapped vehicles to the total number of vehicles (i.e., if 7% of the fleet is scrapped in any one year, that fleet comprises 15 years worth of life).

3.18 The result of this is multiple forecasts for the growth in eVans, segmented by LA, business type and business size.

3.19 All forecasts are then split by MSOA. We have used the census dataset 'car or van availability' to apportion the number of vans and eVans from LA to each MSOA.

Forecast potential energy demand: eVans

3.20 To calculate the potential annual energy demand from eVans the following methodology was used.

$$Average\ Daily\ Mileage_{vans} \times \text{Mileage Factor}_{segment} \times Vehicle\ Efficiency \times Average\ Working\ Days_{year} = Annual\ Energy\ Demand\ (kWh)$$

3.21 The assumptions used in the above calculation are shown in Table 3-4.

Table 3-4: Van assumptions used to calculate energy demand.

Parameter	Assumptions	Source
Daily average mileage	72 miles	Van telematics
Working days per annum	251 days	265 days less 105 weekend days and 9 public holidays
Average vehicle efficiency	2 miles/kWh	Real-world data

3.22 Using the same sources as described earlier mileage factors are assigned to each industry segment as shown in Table 3-5.

Table 3-5: Van mileage factor by industry segment.

Segment	Mileage Factor
Agriculture, forestry & fishing	0.8
Production	1.0
Construction	1.0
Motor trades	0.8
Wholesale	1.0
Retail	1.1

Segment	Mileage Factor
Transport & storage (inc postal)	1.2
Accommodation & food services	0.8
Information & communication	1.0
Property	0.8
Professional, scientific & technical	1.0
Business administration & support services	1.0
Public administration & defence	1.0
Education	0.8
Health	1.0
Arts, entertainment, recreation & other services	0.8

3.23 Average eVan efficiency data was gathered through industry research and using results of fleet electrification analyses delivered by Mitie Plan Zero Transport Consulting.

3.24 The average daily mileage and typical eVan efficiency data was then used to calculate the average kWh charging needs per day (capped against typical eVan battery size – 68 kWh). Annual charging demand is based on an average 251 working days (365 less 105 weekends and 9 public holidays).

Forecast potential EV charger demand: eVans

3.25 Using anonymised vehicle telematics data from 10 businesses of varying fleet sizes and Industry Groups (gathered via Mitie Plan Zero Transport Consulting services), an analysis was conducted to identify vehicle primary and secondary stop locations based on time of day. Primary locations were classified as those locations where a vehicle spent most of the time stopped over a 24-hour period, while secondary locations were identified as those locations where a vehicle was stopped for the next longest time

3.26 The identified stop locations were categorised based on whether it was:

- Home/ Near home – where a vehicle was taken home overnight,
  - The UKPN White Van Plan research found that for business with less than 250 employees around 21% of van drivers park at home, so 79% might rely on on-street public residential charging near home.
  - Mitie analysis from larger fleet driver surveys suggest 44% have access to off-street parking/charging, meaning 56% might rely on on-street public residential charging near home.
- Workplace – where a vehicle stopped at a company office location,
- Depot – where a vehicle stopped at a company industrial location,
- Destination/ Enroute – where a vehicle stopped somewhere else, during its daily operation.

3.27 The forecasting assumption is that vehicles will prefer to charge where they already make stops of sufficient duration. In reality, charging behaviour will evolve as charging infrastructure and other factors, such as company policies, develop over time.

3.28 A range of assumptions were applied, based on above location type and vehicle charging needs, to estimate the forecast charging demand from eVans at each location type (shown in Appendix A). Based on the results of fleet electrification analyses delivered by Mitie Plan Zero

Transport Consulting, charger powers have been assigned to each stop location type. These charger powers (which reflect the average charging power expected to be available/drawn at the location types, e.g. at van depots there may be a selection of 7, 11 and 50 kW chargers), directly reflect vehicle dwell times and business usage patterns:

- Home – 7kW
- Public Residential (Near Home) – 8kW
- Workplace – 11kW
- Van depot[7] – 25kW
- Destination – 11kW
- Enroute – 50kW growing to 150 kW in 2050

3.29 Further assumptions were applied to estimate the proportion of vehicle charging that would take place at each identified stop location, based on Industry Groups and employment size band. The assumptions aimed to account for increased complexity of fleet operations as employment size bands and associated van numbers increase. The assumptions used were generated based on:

- Industry knowledge and understanding of van operations within different industry groups,
- Information gathered via project Workshop discussions,
- Information gathered through Mitie Plan Zero fleet consultancy projects and
- Gathered research materials (e.g. UKPN White Van Plan, DfT Van Statistics).

3.30 Charging demand for destination and en-route charging is distributed to the MSOA of charging using Origin-Destination matrices from SERTM (South East Regional Transport Model), which are used to identify the likely destinations of trips originating from each MSOA, splitting and allocating demand accordingly.

3.31 An additional output is generated which identifies potential en-route charger sites. This methodology was developed by TfN and is based on several factors:

- Site characteristics including classification of greenfield/brownfield land, and flood risk
- Trip characteristics from the regional model outputs, including trip length and the routing of the trip through the major road network
- Charging probability assumptions, with charging propensity assumed with a normal distribution around a 100km point into the trip.

3.32 This output is designed to identify broad areas in which charging infrastructure development may be suitable, and is produced for cars and vans combined, and separately for HGVs.

HGVs

3.33 The methodology for HGVs remains unchanged from that developed by TfN. Full details can be found in their methodology document, and a summary is provided below.

Baseline and forecast of fleet and eHGV fleet

3.34 The TfN developed EVCI tool incorporates HGV fleet numbers from CAFCarb, a model in the wider analytical framework. In CAFCarb, the baseline fleet is calculated using DVLA fleet

[7] The term 'van depot' is used in the modelling methodology to differentiate between bus depots and HGV depots.

registration data by Local Authority District, which includes information on fuel type and vehicle age.

3.35 To forecast the future fleet, deletions are first modelled by removing vehicles based on a scrappage curve as a function of vehicle age.

3.36 To calculate additions to the fleet, the model compares the expected growth in the fleet for a given year with the number of vehicles remaining after scrappage has occurred, adding the vehicles required to meet this growth on a zonal basis. A lookup table of expected vehicle sales by fuel type is used to determine the proportion of vehicles added which are EVs.

Forecast potential energy demand: eHGVs

3.37 HGV vehicle kilometre data by MSOA is taken from outputs from the South East Regional Transport Model (SERTM). This is distributed across the HGV fleet by fuel type based on the fleet composition, to give eHGV vehicle kilometres by MSOA.

3.38 Annual charging demand is calculated by applying electricity consumption assumptions based on research by Element Energy to these vehicle kilometres.

Forecast potential EV charger demand: eHGVs

3.39 Assumptions on charging behaviour are used to split the demand by charging category, with 80% of demand allocated to HGV depots and 20% to rapid en-route charging.

3.40 Demand is geographically distributed to the MSOA of charging based on the following:

- HGV depots - are based on Element Energy's GB database of depot locations and fleet sizes,
- Rapid en-route charging – is summed for the whole major road network (MRN) and distributed to specific sites along the MRN considering various factors including the trip purpose, distance and origin and destination.

3.41 Power and utilisation assumptions are applied to the charging demand to calculate the charger requirement by MSOA.

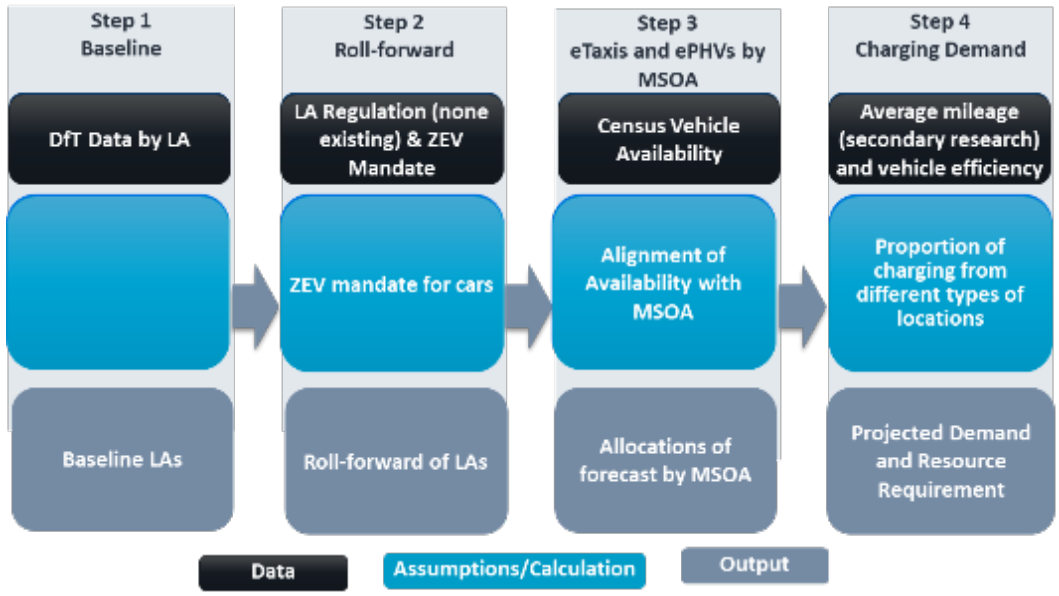
Table 3-6: HGV charger power assumptions by charging category (kWh)

	2025	2030	2035	2040	2045	2050
HGV depot	20	24	28	32	36	40
HGV en-route	450	550	650	750	850	950

Taxis and PHVs

3.42 Forecasts have been developed for the penetration of EV within projected fleets of taxis and private hire vehicles (PHVs) and the associated demand for energy and charging resources. For the most part, taxis and PHVs will use the same charging infrastructure as private cars, and accordingly charger requirements have not been calculated for these vehicles explicitly to avoid double counting. To avoid confusion these eTaxi and ePHV forecasts are also not shown in the STB EVCI Framework visualiser.

Figure 3-2: Taxi and PHV methodology overview



Source: Steer

3.43 Cars are forecasted for the sole purpose of providing an EV penetration rate in the fleet by local authority, which is used to forecast the growth in EVs for Taxis and Private Hire Vehicles (PHVs). Taxis are vehicles licensed to pick customers up from the roadside, whilst Private Hire Vehicles are only permitted to pick up pre-arranged bookings.

Baseline and forecast of total car fleet

3.44 Data from DfT Statistics VEH0105, which has registration data split by ownership type (private and company), has been used to identify the number of cars in each LA.

3.45 VEH0105 is impacted by where vehicle leasing companies register vehicles. Leasing companies register vehicles at specific offices, but the vehicles themselves could be driven elsewhere. As a result, the number of company cars in a local authority can be skewed, especially if a large leasing company is located there.

3.46 To account for this problem, company cars are calculated as a function of private cars:

$$\frac{Private\ Cars\ in\ each\ LA}{Private\ Cars\ in\ the\ UK} \times Company\ Cars\ in\ the\ UK = Company\ Cars\ in\ each\ LA$$

3.47 This allocation is considered suitable for company cars which constitute around 10% of the total car fleet, whilst company registered vans comprise around 50% of the total Van fleet (DfT VEH0105).

3.48 In 2023, we use the average Year on Year (YoY) growth rate from 2015 to 2019, to exclude pandemic years, as the YoY growth rate for each local authority. This growth rate decreases linearly to 0% by 2050.

Baseline and forecast of eCar fleet

3.49 Data from DfT Statistics VEH0142, which has registration data split by ownership type (private and company), has been used to identify the number of eCars in each LA.

3.50 VEH0142 is also impacted by where leasing companies register vehicles. As a result, company cars have been recalculated based on census car and van availability of the population.

3.51 The addition of new eCars into the fleet has been forecasted as a function of the ZEV mandate. This is show in Table 3-7:

Table 3-7: ZEV mandate, % of newly manufactured cars that are required to be ZEVs.

2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
22%	26%	33%	38%	52%	66%	80%	84%	88%	92%	96%	100%

3.52 The average useful life of eCars in 2030 is adjusted to get the number of deletions required to reach an EV penetration rate of the fleet of 99% by 2050. This is because it is assumed that there will still be a very small proportion of ICE that have not been aged out of the fleet.

3.53 Taxis and PHVs use very similar data sources and have been forecasted with the same methodology. Consequently, the following section outlines the methodology for both the vehicle types.

3.54 In the absence of any known changes in licencing regulations impacting the transition to an electric fleet, the EV penetration rate of cars from the ZEV mandate have been used, as calculated above.

Baseline and forecast of Taxi and PHV fleet

3.55 DfT TAXI_0104 and PHV_0104 are government datasets that provide the number of registered Taxis and PHVs by local authority.

3.56 DfT TAXI_0101a is a government dataset that provides historical data on the number of Taxis and PHVs licensed by area (less granular than by local authority). This dataset has historical data every two years starting from 2005, and yearly historical data starting from 2017 onwards. The area “England Outside London” from 2017 onwards (excluding 2021) has been used to calculate the historical YoY growth rate as London has taxi and PHV licencing laws that impact the rate of electric vehicle uptake in this population.

3.57 It is assumed that this historical rate is the same for all local authorities, as there is historical taxi data by LA for 2022 and 2023 only.

3.58 In 2023, the average of the YoY growth rate of the historical years is used. This excludes the COVID lockdown year (2021):

- For Taxis, the average historical growth rate was -3.1%
- For PHVs, the average historical growth rate was 4.3%
- This growth rate is adjusted yearly until it reaches to 0% by 2050.

3.59 The growth in booking platform and apps such as Uber have contributed to the growth in PHVs and decline in Taxis.

Baseline and forecast of electric Taxi and PHV fleet

3.60 DfT TAXI_0117 and PHV_0117 are government datasets that give the fuel type of taxis and PHVs by **region**. We believe that this data is not granular enough, so this dataset has **not** been used. Instead, the eCar penetration rate in 2022 is used to calculate the number of eTaxis and ePHVs, as presented in Table 3-8.

Table 3-8: EV Penetration in Cars in 2022 by Local Authority (based on reallocation of vehicles to where they operate using census data).

Local Authority	EV Penetration (Fleet)
Bracknell Forest	3.4%
Brighton and Hove	3.2%
East Sussex	3.0%
Hampshire	3.3%
Isle of Wight	2.5%
Kent	3.0%
Medway	2.1%
Portsmouth	1.7%
Reading	2.7%
Slough	2.5%
Southampton	1.8%
Surrey	4.5%
West Berkshire	3.7%
West Sussex	3.1%
Windsor and Maidenhead	4.8%
Wokingham	4.7%

Forecast of eTaxi/ePHV fleet

3.61 The growth of eTaxis and ePHVs used the penetration of eCars in the total car fleet. For each LA, the number of eTaxis and ePHVs was calculated by:

$$Total\ Number\ of\ Taxis\ or\ PHVs\ \times EV\ Penetration\ Rate\ in\ Total\ Car\ fleet = Number\ of\ eTaxis\ or\ ePHVs$$

Forecast potential energy demand: eTaxi/ePHV

3.62 Potential energy demand has been calculated using the following methodology.

$$Annual\ Average\ Mileage_{taxi/PHV}\ \times Vehicle\ Efficiency\ \times = Annual\ Energy\ Demand\ (kWh)$$

3.63 The table shows the average mileages used and the sources. 3.3 miles/kWh was used as the vehicle efficiency, slightly below that of cars to reflect the higher amounts of idling time waiting for passengers with ancillary energy use from heating/cooling.

Table 3-9: Taxi and PHV average annual mileage assumptions and sources.

Average Mileage Assumptions		
Taxi	27,962	Based on taxi survey data that drivers travel an average of 70 miles per day (~110km) for an estimated 300 days per year (TfL data).
PHV	37,282	Provided by large PHV operator, includes personal distance travelled for an average full-time driver.

3.64 For both eTaxis and ePHVs, as their daily mileage in most cases can be done on a single charge, it is assumed that overnight charging at/near home will be preferred for this reason the home/public residential charging demand reflect the off-street parking availability[8], the remainder of the charging (around 20%) will be en-route or at destinations where drivers may take a break throughout the day.

3.65 Charger demand from cars is calculated in the EVCI Model methodology developed by TfN. Charger demand has therefore not been explicitly calculated for Taxis and PHVs to avoid confusion or double counting, as in the most part chargers will be shared with private cars.

Buses

3.66 The forecast developed covers public service buses only, mini-buses and coaches (which make up 16% of all registered 'Buses'[9]) and non public service vehicles are excluded as their use cases and electrification rates are deemed be different and slower.

3.67 Following stakeholder consultation, it is assumed the vast majority of public service bus charging will take place at the depot. Therefore, to forecast Public Service Bus charging requirements, the location of bus depots and number of vehicles operating from them were identified using two publicly available datasets: buslists.org and DfT's Vehicle Operator Licensing database.

3.68 Operationally as charging will be done overnight while the buses are stationary in the depot, the demand for chargers is equal to the maximum number of chargers the depot will accommodate.

3.69 Energy demand is based on average mileage and vehicle efficiency.

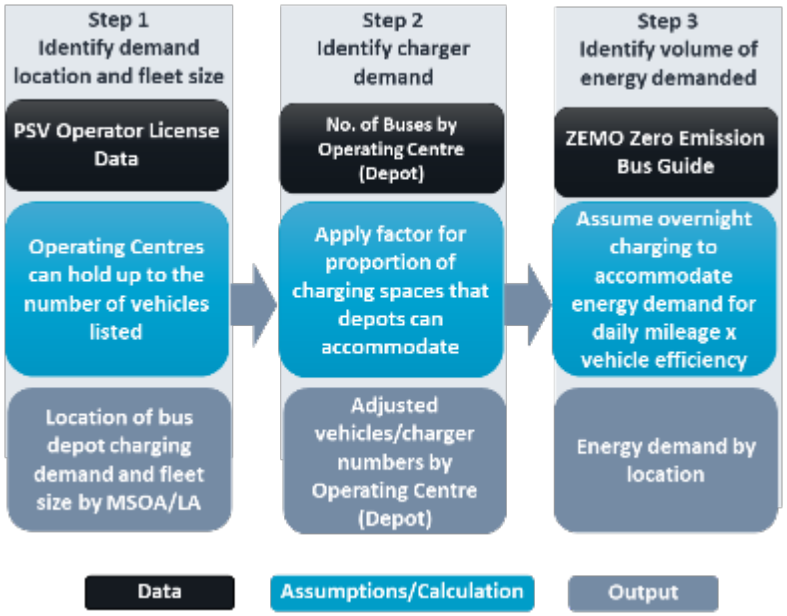
$$Annual\ Average\ Mileage_{Bus} \times Vehicle\ Efficiency_{eBus} = Annual\ Energy\ Demand\ (kWh)$$

3.70 The following text describes these steps in more detail.

[8] Based on the RAC foundation report - https://www.racfoundation.org/wp-content/uploads/standing_still_off_street_parking_by_LA_high_to_low.pdf (Last accessed 20th August 2024)

[9] DfT, Bus06

Figure 3-3: Bus forecast methodology overview



Source: Steer

Baseline and forecast of Bus fleet inc. PiV penetration

3.71 The baseline number of public service buses by LA and MSOA are determined by summing the number of buses in each of the operating centres within the LA/MSOA.

3.72 Key regional operators were identified in each local authority, and the location of depots and number of vehicles operating from each depot taken from the DfT vehicle operator licensing data.

3.73 The fleet forecast for the region is based on public service bus statistics for 'England outside London'. The average year on year change in the fleet from 2018 to 2022 has been -2.0% The forecasted change in fleet moves to 0% by 2050, as presented in Table 3-10.

Table 3-10: Forecasted UK YoY growth rate of public service buses in a given year.

2025	2030	2035	2040	2045	2050
-2.0%	-1.5%	-1.1%	-0.7%	-0.4%	0%

Forecast of eBus fleet

3.74 To forecast the future eBus fleet, projections have been informed by major national bus operators, and include the following assumptions:

- ZEBs represented over 50% of new UK bus registrations in 2021[10].
- Of the 2,907 zero emission buses in operation the UK (November 2023) 95% are Battery Electric, 5% are Hydrogen Fuel Cell[11].

[10] ZEMO_ZERO_EMISSION_BUS_GUIDE_2022_ONLINE_VERSION.pdf

[11] https://www.zemo.org.uk/work-with-us/buses-coaches/low-emission-buses/areas-of-operation.htm

- Following the government consultation on ending the sale of non zero emission buses no later than 2032, CPT[12] and ZEMO[10] reports state that National Express have voluntarily committed to operating a fully zero emission bus fleet by 2030 and Go-Ahead Group, First Bus and Stagecoach have committed to the same by 2035. These are part of the five of the nation's largest operators which operate approximately 55% of the public service bus fleet in the TfSE region.

Table 3-11: Forecast eBus penetration in Bus fleet.

2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
1.5%	3.9%	6.0%	8.4%	10.7%	13.7%	17.4%	21.9%	27.3%	33.5%	40.4%	47.6%	55%

Forecast potential energy demand: eBuses

3.75 To calculate the potential daily energy demand from eBuses the following methodology was used.

$$Average\ Daily\ Mileage_{public\ service\ buses} \times Vehicle\ Efficiency \times Average\ Working\ Days_{year} = Annual\ Energy\ Demand\ (kWh)$$

3.76 From stakeholder engagement, average daily mileage is understood to be 250 km with the average bus operating the equivalent of 6 days a week over 51 weeks a year, travelling 76,000 km a year. Average vehicle efficiency 1 kWh/km based on Zemo report[10] and verified by stakeholder engagement.

Forecast potential charging demand: eBuses

3.77 Due to the high proportion of charging taking place at depots, and the highly situational nature of any en-route rollout, all bus charging demand is assigned to the location of the depot.

3.78 From stakeholder engagement with the CPT and eBus fleet solution providers, we determined that the average bus depot will likely be able to accommodate chargers for 90% of the buses it stations. To minimise grid connection size each vehicle will draw on average 60 kW to get the charge it needs overnight. These assumptions were used to calculate the charger requirement at each depot.

[12] https://www.cpt-uk.org/media/g31m2eor/ending-the-sale-of-new-non-zero-emission-buses.pdf

4 Future Work

Future Updates (Maintenance)

4.1 At the time of developing this model, 2022 was the last full year with published data so the forecast begins in 2023. Annual updates should include an update to the baseline. Comparing the forecast with actuals will also guide whether other updates are needed through the model assumptions and methodology.

Future Developments

4.2 Due to the pioneering nature of this work and the early stage of EV uptake in fleets it is advised that the methodology and assumptions should be reviewed and updated annually. Advancements in both vehicle and charging technology as well as markets and the policy and regulation landscape could significantly impact the trajectory of the transition to EVs and the charging demand.

4.3 For example, our stakeholder engagement (including with the CPT) determined that the majority of Coach operators are not seeing any viable eCoach models on the market (from a cost and/or mileage versus duty cycle perspective). As such there are virtually no eCoaches in operation. When the technology and costs make transition possible, forecasts can be developed and included, perhaps alongside HGVs as their duty cycles, routes and potential stop locations were deemed to be most similar according to the Fleet Electrification Working Group.

4.4 In the Taxis and PHV sector changes to policies and regulations (local or national) may influence significant changes in uptake trajectories, as did the licencing rules brought in in London several years ago.

Future Applications

4.5 TfSE are working on exploring how they can further support LAs make use of the data from the tool to develop business cases for EV Infrastructure for fleets in their areas.

A Appendix: Van Assumptions by Segment

Table A-1: eVan uptake rate (in sales) relative to ZEV mandate by segment.

Industry Sector	Business Size (Enterprise Employment Band)						
	0-4	5-9	10-19	20-49	50-99	100-249	250+
Agriculture, forestry & fishing	0.80	0.80	0.80	0.80	1.00	1.00	1.00
Production	0.80	0.80	0.80	0.80	1.00	1.00	1.10
Construction	0.80	0.80	0.80	0.80	1.00	1.10	1.10
Motor trades	0.80	0.80	0.80	0.80	1.00	1.10	1.10
Wholesale	0.80	0.80	0.80	0.80	1.00	1.10	1.10
Retail	0.80	0.80	0.80	0.80	1.00	1.10	1.10
Transport & storage (inc postal)	0.80	0.80	0.80	0.80	1.00	1.10	1.10
Accommodation & food services	0.80	0.80	0.80	0.80	1.00	1.00	1.00
Information & communication	0.80	0.80	0.80	0.80	1.00	1.00	1.10
Property	0.80	0.80	0.80	0.80	1.00	1.10	1.10
Professional, scientific & technical	0.80	0.80	0.80	0.80	1.00	1.10	1.10
Business administration and support services	0.80	0.80	0.80	0.80	1.00	1.10	1.10
Public administration & defence	0.80	0.80	0.80	0.80	1.00	1.00	1.00
Education	0.00	0.00	0.00	0.00	1.00	1.00	1.00
Health	0.80	0.80	0.80	0.80	1.00	1.00	1.00
Arts, entertainment, recreation	0.80	0.80	0.80	0.80	1.00	1.00	1.00

Table A-2: Van segment charger split by category/type (charger_distribution_assumptions).

Table A-2: Van segment charger split by category/type (charger_distribution_assumptions).

Each segment's charging across the five categories sums to 1, blank cells indicate that no charging is carried out at that type of location for that segment.

	Employee Band														
	0-4 and 5-9					10-19					20-49				
	Home	Public residential	Work	Depot	Destination /En-route	Home	Public residential	Work	Depot	Destination /En-route	Home	Public residential	Work	Depot	Destination /En-route
Agriculture, forestry & fishing	0.126	0.474			0.4	0.105	0.395	0.2		0.3	0.105	0.395	0.2	0.1	0.2
Production	0.126	0.474			0.4	0.105	0.395	0.2		0.3	0.105	0.395	0.2	0.1	0.2
Construction	0.126	0.474			0.4	0.126	0.474			0.4	0.105	0.395		0.2	0.3
Motor trades	0.126	0.474			0.4	0.105	0.395	0.4		0.1	0.084	0.316	0.5		0.1
Wholesale	0.126	0.474			0.4	0.105	0.395			0.1	0.084	0.316		0.5	0.1
Retail	0.126	0.474			0.4	0.105	0.395	0.4		0.1	0.084	0.316	0.5		0.1
Transport & storage (inc postal)	0.126	0.474			0.4	0.126	0.474			0.1	0.105	0.395		0.4	0.1
Accommodation & food services	0.126	0.474			0.4	0.105	0.395	0.2		0.3	0.084	0.316	0.2	0.2	0.1
Information & communication	0.126	0.474			0.4	0.126	0.474			0.4	0.105	0.395	0.1		0.3
Property	0.126	0.474			0.4	0.126	0.474				0.126	0.474			0.4
Professional, scientific & technical	0.126	0.474			0.4	0.105	0.395			0.4	0.105	0.395	0.3		0.2
Business administration and support services	0.126	0.474			0.4	0.105	0.395	0.3		0.2	0.105	0.395	0.3		0.2
Public administration & defence	0.126	0.474			0.4	0.105	0.395	0.3		0.2	0.084	0.316	0.4		0.2
Education	0.126	0.474			0.4	0.105	0.395	0.3		0.2	0.084	0.316	0.6		
Health	0.126	0.474			0.4	0.105	0.395	0.5		0	0.084	0.316	0.6		
Arts, entertainment, recreation	0.126	0.474			0.4	0.105	0.395	0.5		0	0.105	0.395	0.4		0.1

	Employee Band														
	50-99					100-249					250+				
	Home	Public residential	Work	Depot	Destination /En-route	Home	Public residential	Work	Depot	Destination /En-route	Home	Public residential	Work	Depot	Destination /En-route
Agriculture, forestry & fishing	0.5	0.2	0.1	0.105	0.395	0.105	0.395	0.2	0.1	0.2	0.22	0.28	0.2	0.1	0.2
Production	0.5	0.2	0.2	0.105	0.395	0.105	0.395	0.2	0.2	0.1	0.22	0.28	0.2	0.2	0.1

	Employee Band														
	50-99					100-249					250+				
	Home	Public residential	Work	Depot	Destination /En-route	Home	Public residential	Work	Depot	Destination /En-route	Home	Public residential	Work	Depot	Destination /En-route
Construction	0.5	0.2	0.2	0.105	0.395	0.105	0.395	0.2	0.2	0.1	0.22	0.28	0.2	0.2	0.1
Motor trades	0.4	0.5	0	0.084	0.316	0.084	0.316	0.5	0	0.1	0.176	0.224	0.5		0.1
Wholesale	0.4		0.5	0.084	0.316	0.084	0.316	0	0.5	0.1	0.176	0.224		0.5	0.1
Retail	0.3	0.4	0.2	0.063	0.237	0.063	0.237	0.4	0.2	0.1	0.132	0.168	0.4	0.2	0.1
Transport & storage (inc postal)	0.4		0.5	0.084	0.316	0.084	0.316		0.5	0.1	0.176	0.224		0.5	0.1
Accommodation & food services	0.3	0.2	0.3	0.063	0.237	0.063	0.237	0.2	0.3	0.1	0.132	0.168	0.2	0.3	0.1
Information & communication	0.5	0.2	0.1	0.105	0.395	0.105	0.395	0.2	0.1	0.2	0.22	0.28	0.2	0.1	0.2
Property	0.126	0.474	0.1		0.3	0.126	0.474	0.1	0	0.3	0.264	0.336	0.1		0.3
Professional, scientific & technical	0.105	0.395	0.3		0.2	0.105	0.395	0.3	0	0.2	0.22	0.28	0.3		0.2
Business administration and support services	0.105	0.395	0.3		0.2	0.105	0.395	0.3	0	0.2	0.22	0.28	0.3		0.2
Public administration & defence	0.084	0.316	0.2	0.2	0.2	0.084	0.316	0.2	0.2	0.2	0.176	0.224	0.2	0.2	0.2
Education	0.084	0.316	0.6			0.084	0.316	0.6			0.176	0.224	0.6		
Health	0.084	0.316	0.6			0.084	0.316	0.6			0.176	0.224	0.6		
Arts, entertainment, recreation	0.084	0.316	0.4	0.1	0.1	0.084	0.316	0.4	0.1	0.1	0.176	0.224	0.4	0.1	0.1

B Appendix: Charging category assumptions (power and utilisation)

These assumptions are lifted from the STB EVCI Framework model, to limit the impacts of changes to other parts of the EVCI tool changes and updates have been restricted to those that are necessary. Values in bold in the tables are the ones that have been updated via this workstream.

Table B-1: Charging category power assumptions by year.

Charging Category	Year	Apparent Power (kW)
home	2023-2050	8
workplace	2023-2050	8
public residential	2023-2050	8
van depot	**2023-2050**	**25**
bus depot	**2023-2050**	**60**
destination	2023-2050	8
en-route	2023	44
en-route	2025	**50**
en-route	2030	**65**
en-route	2035	**75**
en-route	2040	**100**
en-route	2045	**125**
en-route	2050	**150**
hgv_en-route	2023	410
hgv_en-route	2025	450
hgv_en-route	2030	550
hgv_en-route	2035	650
hgv_en-route	2040	750
hgv_en-route	2045	850
hgv_en-route	2050	950
hgv_depot	2023	20
hgv_depot	2025	20
hgv_depot	2030	24
hgv_depot	2035	28
hgv_depot	2040	32
hgv_depot	2045	36

hgv_depot	2050	40

Table B-2: Utilisation assumptions by charging category.

Charging Category	Year	Utilisation (hours per day)	Utilisation (%)
home	2023-2050	8	33.3
workplace	2023-2050	4.3	17.9%
public residential	2023	1.3	5.4%
public residential	2025	1.5	6.3%
public residential	2030	4	16.7%
public residential	2035	6	25.0%
public residential	2040	6	25.0%
public residential	2045	6	25.0%
public residential	2050	6	25.0%
van depot	**2023**	**6**	**25.0%**
van depot	**2025**	**8**	**33.3%**
van depot	**2030**	**10**	**41.7%**
van depot	**2035**	**12**	**50.0%**
van depot	**2040**	**14**	**58.3%**
van depot	**2045**	**14**	**58.3%**
van depot	**2050**	**14**	**58.3%**
destination	2023	1.3	5.4%
destination	2025	1.5	6.3%
destination	2030	3	12.5%
destination	2035	4	16.7%
destination	2040	5	20.8%
destination	2045	6	25.0%
destination	2050	6	25.0%
en-route	2023	1.3	5.4%
en-route	2025	1.5	6.3%
en-route	2030	2	8.3%
en-route	2035	2.5	10.4%
en-route	2040	3	12.5%
en-route	2045	3	12.5%
en-route	2050	3	12.5%
hgv_en-route	2023	1	4.2%
hgv_en-route	2025	1	4.2%
hgv_en-route	2030	1.5	6.3%
hgv_en-route	2035	2	8.3%
hgv_en-route	2040	2.5	10.4%
hgv_en-route	2045	3	12.5%
hgv_en-route	2050	3	12.5%

Charging Category	Year	Utilisation (hours per day)	Utilisation (%)
hgv_depot	2023	8	33.3%
hgv_depot	2025	8	33.3%
hgv_depot	2030	8	33.3%
hgv_depot	2035	8	33.3%
hgv_depot	2040	8	33.3%
hgv_depot	2045	8	33.3%
hgv_depot	2050	8	33.3%

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30th September

Agenda item 9

Report to:	**Partnership Board –Transport for the South East**
Date of meeting:	**27 January 2025**
By:	**Chair of Audit and Governance Committee**
Title of report:	**Audit and Governance Committee Update**
Purpose of report:	**To provide an update on the Audit and Governance Committee**

RECOMMENDATIONS:

The members of the Partnership Board are recommended to:

1) **Note the discussions and actions arising at the meeting of the Audit and Governance Committee; and**
2) **Members are also asked to agree the Strategic Risk Register.**

---

1. Introduction

1.1 The Audit and Governance Committee met on Wednesday 15 January 2025. This report provides a summary of the discussions and actions to take forward.

2. Audit and Governance Committee

2.1 The Committee reviewed the draft Business Plan 2025/26. The Committee commended the Business Plan, noting the work had gone into it. The Committee also reviewed the spend of the forecast uncommitted underspend of £317,435 on delivering additional technical work, agreeing the recommendations put forward.

2.2 The Committee reviewed the finance position spend to December 2024, noting the reduced underspend. From 2025/26 the Committee have requested confidence ratings for the end of year forecasts to be reviewed at their meetings.

2.3 The Strategic Risk Register was reviewed by the Committee. The Committee noted the new risks that had been identified following the publication of the Devolution White Paper. Whilst the Committee agreed with the new risks, they asked for the probability to be increased to a 5, as devolution is a certain, even if each combined authority's timescales, powers and geographies are not certain. The Committee asked for Devolution to be a standing item on their agenda.

2.4 The Committee reviewed their forward programme of work for 2025/26 noting that whilst we are going though Devolution and begin to gather more of an

understanding, there will be a requirement for Committee to work on the Inter Authority Agreements and Constitution. The Committee are going to consider which areas of TfSE's technical work programme they wish to conduct a deep dive on ahead of their next meeting.

3. Conclusions and recommendations

3.1 The Partnership Board is recommended to note the discussions and actions arising at the recent meeting of the Audit and Governance Committee and approve the Strategic Risk Register.

Councillor Joy Dennis
Chair
Audit and Governance Committee
Transport for the South East

Contact Officer: Jessica Lelliott
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Risk Register

Programme Overview

January 2025

TRANSPORT FOR THE South East

#	Risk Description	Score if no action taken (1-5)		LxI =	Mitigating action	Score post action (1-5)			Owner	Review date	Escalation route
		Impact	Probability	Risk score		Impact	Probability	Risk score			
2	**Government Policy - STBs** Government policy around STBs is uncertain, particularly in light of other changes to government policy.	4	4	16	Continue to monitor developments. Work with other STBs to produce a strategy for potential changes to government policy.	1	2	2	All	Ongoing	SOG
3	**MP Engagement** Local MPs do not support TfSE and its strategy.	3	3	9	Following the general election, TfSE received 50 new MPs. Attend Liberal Democrat conference, 0 Lib Dem MPs pre election, now have 18. Scheduling meetings with all new MPs	2	2	4	Head of Programme and Policy	Ongoing	PB
4	**TfSE - Statutory Status** Maintaining the TfSE partnership without statutory status.	2	3	6	Ongoing engagement with Leaders. Secure indicative funding for future years to demonstrate DfT commitment to TfSE.	2	1	2	Chief Officer	Ongoing	PB
6	**TfSE - Value** Wider stakeholders do not recognise value of TfSE.	2	2	4	Use appropriate stakeholder forums as a route to engage stakeholders. Communication and Engagement Plan 2024/25 to be implemented.	1	2	2	Head of Programme and Policy	Ongoing	SOG
8	**Reduced Funding for 24/25** Reduced funding in 2024/25 may impact on work programme as set out in Business Plan.	4	3	12	£200k reduction from the ask set out within the Business Plan for 2024/25. Agreed amended work plan delivering against this.	2	2	4	All	Ongoing	PB
9	**Regional Inequality** Focus on regional inequality directs investment away from the South East. Grouping of London & SE not an accurate representation.	4	4	16	Continue to make the case for investment in the South East. We will continue to monitor distribution of project funding across STB regions as part of our value for money work within our Annual Report.	4	3	12	SOG/ Secretariat	Ongoing	PB
11	**TfSE Staff - Retention** Retaining staff in TfSE and plans to replace staff if the need arises.	2	2	4	Ensure succession planning is in place. Regular supervisions with staff, opportunities for further development and training. Advertising roles in key publications. Making roles region-wide and flexible approach to working. Using recruitment consultants as and when appropriate.	2	1	2	TfSE Management Team	Ongoing	PB

#	Risk Description	Score if no action taken (1-5)		LxI =	Mitigating action	Score post action (1-5)			Owner	Review date	Escalation route
		Impact	Probability	Risk score		Impact	Probability	Risk score			
12	**Procurement** Procurement unable to respond to adhoc needs from TfSE	1	2	2	Develop forward plan with procurement for future work. Majority of work will go through the technical call off contract.	1	1	1	Secretariat	Ongoing	PB
13	**SIP Delivery Plan** Constituent authorities do not support the SIP delivery plan.	2	2	4	Continued engagement with SIP delivery partners.	1	2	2	Analytical Team	Ongoing	SOG
15	**Infrastructure Investment proposals - challenges** Challenge to infrastructure investment proposals from stakeholders.	3	4	12	Robust evidence and processes to demonstrate approach. Exploring how to unlock private investment through our Funding & Finance Working group	2	4	8	Head of Programme and Policy	Ongoing	SOG
18	**24/25 Budget** Managing the 24/25 Budget to ensure the DfT grant and carry forward from 23/24 is fully spent	3	3	9	Effective budget monitoring on a monthly basis and demonstrate TfSE's performance to DfT through regular review meetings and annual report.	2	2	4	Head of Programme and Policy	Ongoing	SOG / PB
19	**Transport Forum - engagement** Transport Forum members engagement with the new structure	2	3	6	Members have had two sessions of digital engagement, two face to face events and a third planned in for January 2025. The Advisory Panel have met before the two recent board meetings, a forward programme is to be created for them to remain focussed. Engagement Manager is reviewing the membership of the group and preparing a refresh.	2	2	4	JL & JMS	Ongoing	PB
20	**Scheme Promotors** TfSE members are not prepared to be scheme promotors to larger schemes with large risks. This could lead to failing to deliver the TfSE transport strategy.	4	4	16	Report on the impact of inflation on schemes, we will use the report to continue discussions with DfT and advocate for a resolution. Working with DfT to better understand cost overrun risk. Officers will explore private sector funding for schemes through the funding and finance meetings. Centre of Excellence work will support early scheme development. Continue development of the common analytical framework with other STBs.	4	3	12	Chief Officer	Ongoing	PB
21	**LEPs Dissolution** The dissolution of Local Enterprise Partnerships (LEPs) in March 2023 leaves a gap in business representation within the Transport for the South East governance structure.	3	4	12	The Business Advisory Group (BAG) have now met twice, a terms of reference has been agreed and an agreed format of an agenda to ensure the business voice is heard at each meeting to feed back into the Partnership Board. Partnership Board can assess the efficacy of the new BAG in capturing the business voice and whether any changes are needed.	1	1	2	Chief Officer	Jul-24	PB

#	Risk Description	Score if no action taken (1-5)		LxI =	Mitigating action	Score post action (1-5)			Owner	Review date	Escalation route
		Impact	Probability	Risk score		Impact	Probability	Risk score			
22	**Transport Policies** Shifts in transport policies and funding allocations, meaning investment in the South East is paused or cancelled.	5	4	20	Maintain open and regular communication with DfT to ensure we are informed about any potential policy changes. TfSE have been approached by the Integrated National Transport Strategy team to support them with their early engagement work.	4	3	12	Chief Officer	Ongoing	PB
23	**Delays in government policy direction.** There could be delays in decision-making processes that could impact the timely implementation of our work programme.	4	4	16	Ensure we maintain open communication with local authorities, stakeholders and the public to manage any expectations and address any concerns promptly. Ensure we are building in flexible timelines within our work in the programme.	4	3	12	Chief Officer	Ongoing	PB
24	**Transport Strategy Refresh - Constituent Authorities Support** Constituent Authorities do not support the Transport Strategy Refresh and does not agree to support the 'missions'.	4	4	16	Changes to local government control mean that the Transport Strategy Refresh will need the sign-off of different stakeholders than the original Transport Strategy. The Transport Strategy Task and Finish Group have now met four times. The Partnership Board have signed off the Strategy at their meeting in December, and it was formally launched on 10th December and is out for consultation for 12 weeks. A number of face to face support surgeries are being scheduled in around the TfSE area.	4	2	8	TfSE Management Team	Dec-25	PB
25	**Transport Strategy Refresh - Central Government Support** Central government does not support the Transport Strategy Refresh and does not sign off the 'missions'. The new government means that the Transport Strategy Refresh needs the sign-off of a different Government than the original Transport Strategy.	4	3	12	The Transport Strategy will align with the emerging Integrated National Transport Strategy. Ensure we continue to engage with DfT officials, and engage with new Ministers following the election. Session took place in October with DfT policy leads on the Transport Strategy Refresh.	4	2	8	TfSE Management Team	Dec-25	PB
26	**Local Contributions** Constituent authorities are not able to pay Local Contributions from 2025 onwards.	5	4	20	Early agreement at Partnership Board. SOG members advised to work into operational budgets. October Board meeting, the Board agreed that the level of contribution would remain as it was in previous years recognising the pressures local authorities are facing. Officers produced work on demonstrating how TfSE delivers value for partners.	4	2	8	KW / Secretariat	Ongoing	SOG / PB

#	Risk Description	Score if no action taken (1-5)		LxI =	Mitigating action	Score post action (1-5)			Owner	Review date	Escalation route
		Impact	Probability	Risk score		Impact	Probability	Risk score			
27	**South East Devolution** The lack of devolution in the South East means that the South East does not receive the same level of policy focus as the North and Devolved Administrations. The South East has no representation in groups such as the Council of Regions and Nations.	4	4	16	Transport for the South East will engage with DfT Ministers and Officials to ensure the South East and Local Authorities in the South East remain high on the Government's agenda. We will reflect any implications within the devolution white paper.	3	2	6	KW / Secretariat	Ongoing	SOG / PB
28	**Rail Reform** The impacts of the Government's plans for rail reform are uncertain. TfSE's role may need to develop to provide strategic advice and democratic accountability to a new Great British Railways body.	4	2	8	TfSE will continue to monitor Government plans and continue to engage with DfT, Network Rail and Great British Railways as plans develop. TfSE will explore options for playing a bigger role in rail, as part of next year's Business Plan.	4	1	4	KW / Secretariat	Ongoing	SOG / PB
29	**Storage of Data** Consistency of data across TfSE geography. Plans if there was a loss of our key operational data and reliance on the ESCC data architecture	4	4	16	The analytical team are developing a data management plan. Clear documentation on any work produced by TfSE and what our data sources are. Backup of databases, with considerations to be made if we moved away from a particular software. Data architecture is being developed.	2	2	4	Analytical Team	Ongoing	SOG / PB
30	**Use of Data** Potential breach of GDPR or breach of data licences, which could result in prosecution/fines	4	4	16	Ensure proper governance in using our data. GDPR register to be completed and reviewed quarterly by the TfSE GDPR officer. Data catalogue to contain the licencsing details for each item. TfSE officers (and consultants) to be made aware of and adhere to the constraints set out.	2	1	2	Analytical Team	Ongoing	SOG / PB
32	**National Planning Policy Reform** Uncertainty on the impacts of National Planning Policy Reform and the Planning and Infrastructure Bill. The NPPF reforms could add extra requirements for housebuilding onto Local Auhthorities, without adequate transport funding, or a mechanism for raising revenues from housebuilding.	4	4	16	TfSE will continue to monitor Government plans and continue to engage with MHCLG and DfT. TfSE recently responded to the open consultation on the NPPF.	4	3	12	Chief Officer	Ongoing	SOG / PB

#	Risk Description	Score if no action taken (1-5)		LxI =	Mitigating action	Score post action (1-5)			Owner	Review date	Escalation route
		Impact	Probability	Risk score		Impact	Probability	Risk score			
33	**Devolution Delays Delivery** The Devolution White Paper was published on 16 December. Many Local Authorities in the TfSE area have made proposals for devolution, but it will take some time for devolution to take effect and Local Authorities may take on powers in phases. Whilst these changes are worked through, there is a risk that the implementation of transport improvements delays delivery.	5	4	20	TfSE will continue to monitor any Government updates and plans. TfSE will continue to support and engage with their Local Authorities whilst their own submissions are made to Government. TfSE remain a constant for the 16 Local Transport Authorities and TfSE continue to deliver our Business Plan, which is focused on supporting the Government and Local Transport Authorities to deliver.	3	2	6	Chief Officer	Ongoing	PB
34	**Devolution affects legislative framework underpinning TfSE** STBs are underpinned in legislation by the Local Transport Act, as amended by Cities and Devolution act 2016. The English Devolution Act could amend the section of this legislation that sets out the role of STBs.	4	4	16	TfSE will continue to work with the 6 other STBs who together with TfSE make up the 7 STBs for England. TfSE will continue engagement with DfT officials and monitor any Government updates and plans. We will stay live to any changes and make sure that we engage with Local Authorities to fulfil the role that they want us to play. TfSE's Chair met with the Transport Secretary, to set out the role that TfSE play on behalf of our Members, and we will ask DfT Ministers to set this out in writing.	3	3	9	Chief Officer	Ongoing	PB
35	**Devolution reuqires changes to TfSE's Governance** As the South East area changes and any potential changes to our authorities our Constitution and Inter Authority Agreements would need to be amended.	3	2	6	TfSE Officers will work with Local Authorites ensuring engagement is timely in order to make the changes to the constitution and inter authority agremeent in a timely manner to ensure the governance of TfSE is correct.	2	1	2	Chief Officer	Ongoing	PB / SOG

Agenda Item 10

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

Date of meeting: **27 January 2025**

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

Title of report: **Financial Update**

Purpose of report: **To update on the budget position for Transport for the South East**

RECOMMENDATION:

The members of the Partnership Board are recommended to note the current financial position for 2024/25 to the end of December 2024.

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1. Overview

1.1 The purpose of this report is to update the Partnership Board on Transport for the South East's (TfSE) financial position for 2024/25 to the end of December 2024.

2. Financial Position to the end of September

2.1 **Appendix 1** sets out the spend position to the end of December 2024 (end of Quarter 2) against the final Business Plan for 2024/25 that the Partnership Board signed off in July.

2.2 As set out in the final Business Plan, our aim to spend our full budget, apart from our earmarked reserve, on delivering our technical programme this Financial Year. In doing so, we aim to reduce our carry forward for the next Financial Year to the lowest amount possible. However, in delivering our work programme, we also seek efficiencies so that we can maximise the value for money we deliver for the taxpayer.

2.3 At the end of Quarter 3, we estimate a carry forward of £528,435 for 2024/25.

Committed Spend

2.4 £211,000 of this is underspend is committed carry forward, to finish work on the transport strategy, analytical framework, decarbonisation, and to support the Kent-Gatwick SOBC in 2025/26.

Uncommitted Spend

2.5 The other £317,435 that we estimate as carry forward is because driven down costs in every area of our business, seeking savings where possible. The Partnership Board can then reallocate this £317,435 to deliver more technical work.

2.6 We forecast uncommitted underspend of £54,000 on the technical programme, as we seek cost efficiencies (this is in addition to the underspend of £211,000, which is committed)

2.7 We forecast an underspend on salaries and training of £180,000, as we have held vacancies in the team, and minimised spending on training.

2.8 We forecast an underspend of £40,825 on communications and engagement, as we have reduced our communications spend and cancelled our planned Connecting the South East event for 2024.

2.9 We forecast an underspend of £42,610 on governance and operational expenses, as we have sought to save money by foregoing attendance at events and conferences and have delayed planned work to review TfSE's governance structures.

3. End of Year Forecast

3.1 Taking the total estimated carry forward of £528,435 into consideration, the current forecast outturn to the year end is £3,397,172, against the budget of £3,925,607.

4. Audit and Governance Committee

4.1 Audit and Governance Committee reviewed TfSE's finances and approved them before submission to the Partnership Board.

5. Conclusions and recommendations

5.1 The Partnership Board is recommended to note the financial position to the end of December 2024.

RUPERT CLUBB
Chief Officer
Transport for the South East

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Appendix 1 – TfSE budget position at end of December 2024/25

	Budget	Actual YTD Spend	Forecast Spend
EXPENDITURE			
Salaries (including on-costs)	1,300,000	793,401	1,138,325
Training	20,000	1,174	1,675
STAFFING	**1,320,000**	**794,575**	**1,140,000**
Transport Strategy	500,000	367,153	*430,749*
SIP implementation	615,000	47,097	*615,000*
Analytical framework	395,000	34,897	*374,977*
Future mobility	40,000	0	*0*
Active travel	56,000	6,126*	*50,862*
Decarbonisation	55,000	15,000	*25,000*
Freight	185,000	62,900	*144,348*
Electric Vehicle Infrastructure	130,000	60,186	*104,295*
Centre of Excellence	260,000	194,782	*260,000*
Other costs/technical support	204,997	124,652	170,766
TECHNICAL PROGRAMME	**2,440,997**	**912,793**	**2,175,997**
Events	41,000	21,779	40,000
Communications	17,500	730	1,250
Publications	5,000	250	1,250
Website	21,000	10,276	10,250
Stakeholder Database	18,000	0	8,925
COMMUNICATIONS/ENGAGEMENT	**102,500**	**33,035**	**61,675**
TfSE Governance	10,000	0	0
Operational Expenses	52,110	16,564	19,500
OTHER	**62,110**	**16,564**	**19,500**
TOTAL EXPENDITURE	**3,925,607**	**1,756,967**	**3,397,172**

FUNDING	
Local Contributions	498,000
DfT Grant	2,065,000
Carry Forward	1,362,607
TOTAL FUNDING EXCLUDING RESERVE	**3,925,607**
TfSE Reserve	406,730
TOTAL FUNDING INCLUDING RESERVE	**4,332,337**

* Due to an administrative issue, the reporting suggests that we have received a credit for the amount of £20,812.50, that we have not received. This will be addressed on the next financial report.

Agenda Item 11

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

Date of meeting: **27 January 2025**

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

Title of report: **Responses to Consultations**

Purpose of report: **To agree the draft responses submitted in response to a consultation.**

RECOMMENDATIONS:

The members of the Partnership Board are recommended to:

1) **Agree the draft response to Invest 2035:The UK's modern industrial strategy; and**

2) **Agree the draft response to Bracknell Forest: Local Plan Transport Consultation.**

---

1. Introduction

1.1 Transport for the South East (TfSE) has prepared responses to these recent consultations. This paper provides an overview of the responses to the following consultations:

- Invest 2035: The UK's modern industrial strategy
- Bracknell Forest: Local Plan Transport Consultation

2. Invest 2035 – The UK's modern industrial strategy

2.1 The Department for Business and Trade published the Invest 2035: the UK's modern industrial strategy consultation on 14 October 2024.

2.2 This consultation closed on 25 November 2024, and the officer level response that was submitted is contained in **Appendix 1.**

2.3 TfSE responded online via the consultation questionnaire. There were three relevant questions which TfSE responded too in the consultation questionnaire. The questionnaire also provided an opportunity to provide any additional information:

- What are the most significant barriers to investment? Do they vary across the growth-driving sectors? What evidence can you share to illustrate this?
- Where you identified barriers in response to question 7 which relate to planning, infrastructure, and transport, what UK government policy solutions

could best address these in addition to existing reforms? How can this best support regional growth?

- How can investment into infrastructure support the industrial strategy? What can the UK government do to better support this and facilitate co-investment? How does this differ across infrastructure classes?

2.4 Within the "significant barriers to investment" question, TfSE identified the specific transport-infrastructure barriers to business investment which the Transport Strategy is seeking to address:

- Poor transport connectivity
- Poor network performance
- Investment uncertainty
- Lack of integration
- Affordability and accessibility

TfSE also highlighted the recent work to refreshing our Transport Strategy which includes a 'Need for Intervention Report'. This report contains the evidence base underpinning the strategy, setting out the challenges that the South East currently faces.

2.5 The Green Paper only contains brief outlines of policy announcements to address barriers to investment and TfSE have outlined the aspects of Government policy that will need to be developed further if the challenges to transport infrastructure barriers are to be addressed.

2.6 In answering how investment into infrastructure can support the industrial strategy question TfSE identified various ways including:

- Enhancing connectivity and accessibility to enable improved access to supply chains and labour markets and facilitate increased trade;
- Enhancing workforce mobility and productivity though reduced travel times;
- Improving the resilience of transport networks and the supply chains that rely on them;
- Reducing distribution costs for businesses.

2.7 Finally, TfSE welcomed the opportunity to respond to the consultation. TfSE took the opportunity within the additional information question to highlight that the South East is the UK's second largest economic contributor with £230bn GVA, this being second only to London. While the region benefits from strategic infrastructure including international ports and airports, it faces two key challenges:

- Economic disparity: A number of our coastal areas have GVA per capita at less than half of Thames Valley and Surrey levels.

- Investment risk: Despite its role in generating national tax receipts, the region risks underperforming without continued investment support.

3. Bracknell Forest: Local Plan Transport Consultation

3.1 Bracknell Forest Council (BFC) held a period of engagement for their Local Transport Plan (LTP).

3.2 This consultation closed on 30 December 2024 however, TfSE have been provided an extension to 6 January 2025 and the officer level response that was submitted is contained in **Appendix 2**.

3.3 Overall, TfSE welcomed the opportunity to respond to the consultation. TfSE trust that our response will provide value to the work of BFC and form the basis for further engagement, especially on the refresh of our Transport Strategy.

3.4 TfSE have highlighted that the BFC vision in their LTP does not make reference to 'integration' or 'improved connectivity'. TfSE have offered a recommendation of adding the word 'integrated' in the first sentence of the LTP vision. TfSE have also added a further recommendation to include 'improved connectivity' in the vision. This is due to the strong strategic road and rail connectivity that BCF enjoys to external destinations anchoring it as a vital economic hub as set out in the 'scene setting' section.

3.5 TfSE were pleased to carry out a comparison of the objectives of the LTP and the fifteen strategic objectives of TfSE's Transport Strategy. TfSE applauded the good alignment with 12 of the 15 strategic priorities aligning with 8 of the 12 BCF objectives.

3.6 Finally, TfSE have highlighted that there is no reference to the role of any strategic transport improvements outside Bracknell Forest. In addition, there is no reference to any joint working with the other Berkshire authorities. TfSE have also expressed the disappointment to not see a reference to the role of TfSE in identifying the strategic infrastructure proposals that will benefit Bracknell Forest, its neighbouring Berkshire authorities as set out in our Strategic Investment Plan (SIP).

4. Conclusions and recommendations

4.1 The members of the Partnership Board are recommended to agree the draft responses to the consultations detailed in this report.

RUPERT CLUBB
Chief Officer
Transport for the South East

Contact Officer: Jessica Lelliott
Email: Jessica.Lelliott@transportforthesoutheast.org.uk

TfSE draft response to the consultation on Invest 2035: The UK's modern industrial strategy

The only mechanism for responding to the consultation was through an online consultation questionnaire. The responses to the three questions relevant to TfSE's mission are set out below with background information about TfSE and general comments on the consultation included in a 'is there any other information you would like to provide' question at the end of the questionnaire.

TfSE's draft responses to the consultation questions

Question 7
What are the most significant barriers to investment? Do they vary across the growth-driving sectors? What evidence can you share to illustrate this?

An efficient and reliable transport system is critical for supply chains, workforce mobility, and market access. The specific transport infrastructure barriers to business investment which Transport for the South East (TfSE) as a Sub-national Transport Body is seeking to address through its regional Transport Strategy are as follows:

1. **Poor transport connectivity** – poor transport connectivity between towns, cities and their rural hinterlands inhibits access to supply chains, the workforce and markets and thereby discourages business investment. The South East regional has good radial road and rail connectivity to London however, most orbital and east-west corridors are poorly served
2. **Poor network performance** – congestion on the network and a lack of maintenance leads to poor reliability and efficiency resulting in increased costs to business. The South East's transport infrastructure faces multiple risks and vulnerabilities that threaten its resilience
3. **Investment uncertainty** - lengthy lead-in times for transport infrastructure and a 'stop-start' approach to transport and infrastructure investment, create uncertainty for businesses
4. **Lack of integration** between:
    a) different transport modes - creates inefficiencies for freight transport and inhibits access to labour markets;
    b) the various national, regional and local bodies responsible for developing and managing the transport system - results in a siloed approach to transport planning and investment and creates uncertainty for businesses about long term investment proposals
    c) transport and land use planning - results in insufficient provision of new and upgraded transport infrastructure to support new business and housing growth

5. **Affordability and accessibility** – lack of affordable and public transport provision inhibits access to labour markets. Many of the coastal areas in the South East are at risk of transport related social exclusion.

As part of the work we have undertaken to refresh our Transport Strategy, we have produced a 'Need for Intervention Report'. This contains the evidence base underpinning the strategy and sets out the challenges that the South East currently faces that our Transport Strategy must seek to address. This report sets out more detail on a number of the barriers to business investment highlighted above in the South East context including:

- Road and rail connectivity challenges
- The impact of congestion on the performance of the road network
- The resilience challenge
- The housing affordability and delivery challenge
- The public transport affordability challenge

A copy of this report can be made available on request, as it will not be made public until the consultation on the Transport Strategy commences on 10 December 2024.

The potential Government policy solutions to these barriers are set out in the response to Question 14.

Question 14
Where you identified barriers in response to question 7 which relate to planning, infrastructure, and transport, what UK government policy solutions could best address these in addition to existing reforms? How can this best support regional growth?

The Green Paper only contains the briefest of outlines of the policy announcements that the Government has made relating to planning, transport, and infrastructure. The specific reforms mentioned are the forthcoming update to the **National Policy Statements,** the announcement in the King's Speech about the forthcoming **Planning and Infrastructure Bill**, the development of a **10 year infrastructure strategy** and a rolling stock strategy for the rail industry.

There are a number of aspects of Government policy that will need to be developed further if the transport infrastructure challenges identified in the response to Q7 are to be addressed.

Infrastructure Planning - There are a number of emerging policy developments that should improve the accelerate the planning and delivery of infrastructure:

- the proposed **Planning and Infrastructure Bill** that will seek to streamline and simplify the consenting process for major infrastructure projects;

- the proposed amendments to the **National Policy Statements** that will need to set clear criteria for project approvals to speed up infrastructure delivery
- the proposed merger of the National Infrastructure Commission and the Infrastructure and Projects Authority to create the **National Infrastructure and Service Transformation Authority** that will have oversight of strategy and delivery into one organisation and develop and implement the Government's forthcoming **10 year infrastructure strategy**.

Funding - There are a number of aspects of the Government's approach to funding that need to be addressed:

- **Ensuring adequate levels of funding for transport infrastructure and longer term funding certainty** to:
    - address the 'stop-start' approach to infrastructure funding planning enabling creation of infrastructure pipelines that will be more attractive to private sector financing and give businesses greater confidence to invest.
    - to improve network resilience by enabling a shift form reactive to preventive maintenance to address wear and tear before major failures occur.
- **Securing greater private sector funding and financing** through**:**
    - **moving to a beneficiary pays approach** through the use of tolls and charges that provide a revenue stream that can be used to finance private sector investment in infrastructure projects;
    - **introducing Improvements to the existing system of developer contributions** to ensure more public value is extracted from development to deliver the necessary transport and social infrastructure required.
    - **promoting the use of more innovative funding mechanisms** to address infrastructure funding gaps including land value uplift and tax increment financing and greater use dedicated investment funds.
- **Local authority funding** – ensure local authorities have both the capital and revenue funding needed to undertake their land use planning and infrastructure planning responsibilities and speed up the planning and delivery of development proposals and their associated infrastructure.

Integrated Transport and Land Use Planning

There are a number of aspects of the way in which both land use and transport planning are undertaken that the Government needs to tackle if the barriers to business investment identified in the response to Question 7 are to be addressed.

- **The need for strategic planning at scale** – currently land use planning through the Local Plan process takes place at too small a scale to enable the

infrastructure needed to support development to be properly planned and provided. Strategic land use planning at scale would provide the opportunity to ensure better alignment between infrastructure investment with land use strategies. This would enable sustainable, efficient, and well-connected communities to be created where homes, workplaces, and amenities are located close to transport links, minimising travel times. These places will be more successful at attracting business investment.

- The **Spatial Development Strategies** (SDS) that have been developed in the mayoral city regions including London, Manchester and Liverpool provide evidence of the merits of land use planning at scale. They assist in identifying constraints, setting housing requirements, identifying strategic employment sites and identifying corresponding infrastructure needs to ensure the Local Plans introduced in an area where an SDS is in place are effective, deliverable and sustainable.

- The Government made a commitment in the recent consultation on proposed revisions to the **National Policy Planning Framework** to provide universal coverage of strategic land use planning across England. The introduction of this approach is welcomed but the Government is yet explore the most effective arrangements for developing SDSs outside of mayoral combined authority areas. This includes the identification of the most appropriate geographies over which they should apply covering 'functional economic areas', as well as the right democratic mechanisms for securing agreement for SDSs.

- The Government has now commenced work development of a **National Integrated National Transport Strategy** (INTS). This will provide the opportunity to achieve better outcomes for business and the travelling public through better alignment between national transport policy, STBs regional transport strategies and the local transport plans produced by local transport authorities. The INTS must address the shortcomings of existing siloed approach to transport infrastructure planning where strategic road, rail and local transport improvements are all planned and delivered separately. This inhibits the ability to deliver a cohesive and efficient transport network enabling seamless interchange between different transport modes and the creation of sustainable, efficient, and well-connected communities that will attract business investment.

The development of the INTS, supported by STBs transport regional strategies, alongside the roll out of SDSs will create the opportunity for integrated transport and land use planning at a regional level. This will enable land use decisions take account of transport system considerations to deliver reductions in the distances

travelled, a shift to more sustainable modes and communities that are more attractive to people and businesses.

Question 15
How can investment into infrastructure support the industrial strategy? What can the UK government do to better support this and facilitate co-investment? How does this differ across infrastructure classes?

There are various ways in which investment into infrastructure support the industrial strategy including the following:

- Enhancing connectivity and accessibility to enable improved access to supply chains and labour markets and facilitate increased trade;
- Enhancing workforce mobility and productivity though reduced travel times;
- Improving the resilience of transport networks and the supply chains that rely on them;
- Reducing distribution costs for businesses.

The Government announced the Planning and Infrastructure Bill in the King's Speech and the creation of a 10 year Infrastructure Plan. The creation of this long term plan should help encourage greater levels of private sector investment by providing greater certainty about the Government's ongoing commitment to infrastructure provision.

Not all segments of the transport system generate fare box revenue that can potentially be used to finance private sector funding and facilitate co-investment. This is particularly the case for road infrastructure where the charge for using the network is collected indirectly through vehicle taxes and fuel duty rather than at the time of use. The Government needs to consider more widespread introduction of the 'beneficiary pays' approach through the use of tolls and charges that provide a revenue stream that can then be used to finance private sector investment in the infrastructure.

Question 36.
Is there any additional information you would like to provide?

Transport for the South East (TfSE) welcomes the opportunity to respond to the consultation on the Government's green paper on its new industrial strategy. **This draft officer response will be presented to our Partnership Board on 9 December 2024 for their approval. A further iteration may therefore follow.**

TfSE is a sub-national transport body (STB) for the South East of England,
Our principal decision-making body, the Partnership Board, brings together representatives from our 16 constituent local transport authorities, district and

borough authorities, protected landscapes, business representatives, Highways England, Network Rail and Transport for London.

The South East contributes £230bn of GVA to the UK economy, this being second only to London. It is a gateway to the UK economy home hosting a number of international ports and airports. However, the region often suffers from being grouped with London in discussions about the economic performance of England's regions. The Green Paper is no exception, with reference to the UK's economic performance being "skewed towards London and the South East". Although the green paper does recognise that "The world-leading industries in London and the South East have a critical role in driving national prosperity", it is vital that investment in the South East continues to ensure it continues to generate the tax receipts needed to unlock the "untapped potential outside the capital and its surrounding areas". Without this continued investment the risk is that the South East's potential will not be realised.

There are significant parts of the South East that are underperforming. A number of our coastal communities have a GVA per capita of less than half those in the Thames Valley and Surrey. The whole county stands to benefit from efforts to address this as they will ensure that the South East realises its full economic potential.

[Ends]

Bracknell Forest Local Transport Plan Consultation Response from Transport for the South East

1. Introduction

1.1 This document is the draft Transport for the South East (TfSE) response to the consultation on Bracknell Forest Council's Local Transport Plan. This is a draft officer response that will be presented to our Partnership Board on 27 January 2025 for their approval. A further iteration may therefore follow.

1.2 TfSE is a sub-national transport body (STB) for the South East of England. Our principal decision-making body, the Partnership Board, brings together representatives from our 16 constituent local transport authorities, district and borough authorities, protected landscapes, business representatives, Highways England, Network Rail and Transport for London.

1.3 We have a vision led Transport Strategy in place to influence government decisions about where, when and how to invest in our region to 2050. This strategy is currently in the process of being refreshed with a draft copy of the revised strategy out for consultation until 7 March 2025.

1.4 Our Strategic Investment Plan provides a framework for delivering our Transport Strategy setting out transport infrastructure and policy interventions needed in our region over the next three decades.

1.5 TfSE welcomes the opportunity to respond to the consultation. We trust that our response will provide value to the work of Bracknell Forest Council Council but also form the basis for further engagement, especially on the refresh of our transport strategy throughout 2025. Specifically, we are keen to establish a 'golden thread' in policy terms so that Bracknell Forest – as well as other Local Transport Authorities (LTAs) – are able to achieve their own goals whilst playing a significant role in achieving our wider vision for the South East.

2. Vision and Objectives

2.1 The Bracknell Forest LTP Vision shows a fair degree of alignment with the 2050 Vision set out in TfSE's existing Transport Strategy. The degree of alignment between the economic social and environment dimensions of the two Visions is set out in Table 1 below.

Table 1: Alignment between the Bracknell Forest LTP Vision and the 2050 vision in TfSE's adopted Transport Strategy.

Bracknell Forest LTP Vision	TfSE Transport Strategy Vision
"To develop a sustainable and resilient transport network that reduces carbon, provides choice and access for all in a safe and healthy environment, making Bracknell Forest a desirable place to live, work and grow."	By 2050, the South East of England will be a leading global region for net-zero carbon, sustainable economic growth where integrated transport, digital and energy networks have delivered a step-change in connectivity and environmental quality. A high-quality, reliable, safe and accessible transport network will offer seamless door-to-door journeys enabling our businesses to compete and trade more effectively in the global marketplace and giving our residents and visitors the highest quality of life.

2.2 The Bracknell Forest LTP Vision does not make reference to 'integration' or 'improved connectivity'. However, the different transport modes will need to be better integrated if Bracknell Forest LTP Vision is to be achieved. For that reason, we would recommend inclusion of the word 'integrated' in the first sentence of the LTP Vision. In the 'Scene Setting' section of the LTP reference is made to the strong strategic road and rail connectivity that Bracknell Forest enjoys to external destinations that anchors it as a 'vital economic hub'. In view of this we would recommend that reference be made to 'improved connectivity' in the Vision.

2.3 A comparison of the objectives of the Bracknell Forest LTP with the fifteen Strategic Priorities of TfSE's Transport Strategy is set out in Table 2. This demonstrates good alignment with 12 of TfSE's 15 strategic priorities aligning with 8 of the 12 Bracknell Forest LTP objectives.

Bracknell Forest LTP Objectives	TfSE Transport Strategy Strategic priorities
Sustainable Travel, enhancing safety and creating inclusive places	
Objective 1.1: Establish inclusive access for all across our transport network	An affordable, accessible transport network for all that promotes social inclusion and reduces barriers to employment, learning, social, leisure, physical and cultural activity.
Objective 1.2: Improve usage of active travel networks	A network that promotes active travel and active lifestyles to improve our health and wellbeing.
Objective 1.3: Create safer roads and lower instances of road traffic accidents	A safely planned, delivered and operated transport network with no fatalities or serious injuries among transport users, workforce or the wider public.
Objective 1.4: Deliver high-quality public realm, supporting safe and connected communities	

Support a thriving and connected economy	
Objective 2.1: Create a transport network to support economic growth, and sustainable access to employment, education and skills training	Better connectivity between our major economic hubs, international gateways (ports, airports and rail terminals) and their markets. More reliable journeys for people and goods travelling between the South East's major economic hubs and to and from international gateways .
Objective 2.2: Embrace new technologies that enhance the quality and efficiency of transport networks and deliver a positive user experience	A 'smart' transport network that uses digital technology to manage transport demand, encourage shared transport and make more efficient use of our roads and railways
Objective 2.3: Support the effective movement of freight across a variety of transport modes	
Objective 2.4: Effectively manage our highway assets in a sustainable way	
Provide a green and sustainable environment	
Objective 3.1: Support decarbonisation of our transport network	A reduction in carbon emissions to net zero by 2050, at the latest, and minimise the contribution of transport and travel to climate change.
Objective 3.2: Reduce dependence on private car travel and enhance modal choice for all	A seamless, integrated transport network with passengers at its heart, making it simpler and easier to plan and pay for journeys and to interchange between different forms of transport. A reduction in the need to travel, particularly by private car, to reduce the impact of transport on people and the environment.
Objective 3.3: Ensure our local transport network protects and enhances the local environment, biodiversity, and air quality	A transport network that protects and enhances our natural, built and historic environments Use of the principle of 'biodiversity net gain' (i.e. development that leaves biodiversity in a better state than before) in all transport initiatives. Improved air quality supported by initiatives to reduce congestion and encourage further shifts to public transport.

Objective 3.4: Encourage the uptake of zero and low emission vehicles	

2.4 The three TfSE strategic priorities that are not encompassed within any of the Bracknell Forest LTP objectives are as follows:

- A transport network that is more resilient to incidents, extreme weather and the impacts of a changing climate.
- A more integrated approach to land use and transport planning that helps our partners across the South East meet future housing, employment and regeneration needs sustainably.
- Minimisation of transport's consumption of resources and energy.

2.5 Network resilience is becoming an increasingly important issue given the impacts of climate change and we would recommend that objective 2.4 be amended to include the phrase 'to improve network resilience'. As a unitary authority, Bracknell Forest Borough Council has the opportunity to deliver a more integrated approach to transport and land use planning. This will be important in achieving a number of the objectives of the Bracknell Forest LTP and would be worthy of inclusion as an additional objective.

2.6 The four objectives of the LTP which do not align with any of TfSE's strategic priorities are as follows:

- Objective 1.4: Deliver high-quality public realm, supporting safe and connected communities;
- Objective 2.3: Support the effective movement of freight across a variety of transport modes;
- Objective 2.4: Effectively manage our highway assets in a sustainable way; and
- Objective 3.4: Encourage the uptake of zero and low emission vehicles;

As a Sub-national Transport Body, TfSE does not have a role in the development and delivery of public realm initiatives nor the management of highway network and hence these aspect of a local transport authority's role are not reflected in TfSE's strategic priorities. However, TfSE's strategic priorities do include reference to the need for improved integration between transport and land use planning which will help support the delivery of a number of the LTP objectives. On supporting freight movement and encouraging the uptake of zero emissions vehicles, TfSE has active workstreams on both these issues as part of its ongoing technical work programme.

3. Other Comments

3.1 Although the primary role of an LTP is to guide transport investment and policy in the area covered by a local transport authority, it is important that it takes account of the relationship with the wider geographical area in which it exists. This is particularly important for an area such as Bracknell Forest that is closely interlinked with neighbouring areas via strategic regional corridors such as the M3 and M4. The Draft LTP includes maps showing Bracknell Forest in context of the South East and the strategic road and rail network connections. However there is no reference to the role of any strategic transport improvements outside Bracknell Forest, that may be needed to improve connectivity to the area. In addition, there is no reference to any joint working with the other Berkshire authorities to help secure these improvements. We are also disappointed to see that there is no reference to the role of TfSE in

identifying the strategic infrastructure proposals that will benefit Bracknell Forest and its neighbouring Berkshire authorities as set out in our Strategic Investment Plan.

3.2 Although we are grateful for the extension that has been allowed to prepare this response, the request for an extension was necessitated by the very short timescale that had been allowed for the consultation (25 November to 30 December) which also concluded in the Christmas Break. We would respectfully request that more time is allowed for similar consultation exercises in the future.

[Ends]

Agenda Item 12

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

Date of meeting: **27 January 2025**

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

Title of report: **Transport Strategy Refresh**

Purpose of report: **To provide an update on the development of the Draft Transport Strategy.**

RECOMMENDATION:

The members of the Partnership Board are recommended to comment on the progress being made with the consultation on the Draft Transport Strategy.

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1. Introduction

1.1 The purpose of this report is to provide a progress update on the development of the Draft Transport Strategy and supporting Draft Integrated Sustainability Appraisal (ISA) following the Partnership Board's decision that they should be published for public consultation.

2. Background

2.1 At the Partnership Board meeting on 9 December 2024, the Partnership Board agreed that the Draft Transport Strategy and associated Draft ISA should be subject to public consultation for a period of 12 weeks. The overall timeline for the development of the Transport Strategy is shown in **Appendix 1**.

3. Public Consultation

3.1 The public consultation on the Draft Transport Strategy and ISA commenced on 10 December 2024 and will conclude on 7 March 2025. A range of engagement activities are currently taking place to encourage organisations and individuals to respond to the consultation.

3.2 On 10 December 2024, the consultation commenced with a launch webinar. This was attended by 153 people from a range of different stakeholders including local authorities, business groups, representatives from socially excluded groups and representatives of local MPs. In addition to introductions from the Chair of the Partnership Board and the Chief Officer, there was a presentation on the strategy content, followed by a panel discussion including Partnership Board Members (Cllr Joy Dennis from West Sussex County Council and Daniel Ruiz) alongside Dan Taylor from the Department for Transport.

3.3 On the same day, the online questionnaire survey went live and within 24 hours nearly 50 responses had already been received. A verbal update on the number of responses that have been received will be given at the Partnership Board meeting.

3.4 The TfSE Team are also running several Strategy Roadshows across the region, to encourage members of the public to respond to the consultation. An update on the locations that are to be visited will be given at the Partnership Board meeting

3.5 The TfSE team will be running a number of strategy surgery sessions that will provide key stakeholders with the opportunity to ask questions in advance of submitting their consultation responses. A special session of the Transport Forum will take place on 30 January 2025, in person in London. This will include an interactive workshop to help the participants in formulating their response to the consultation, as well as capturing feedback from the Transport Forum members that can be fed into the consultation report.

3.6 TfSE have been approached by several organisations to either take part in one of their meetings, or run a dedicated engagement workshop with them. Expressions of interest have been received from the following organisations:

- The Chartered Institution of Highways and Transportation (South East Branch)
- The Transport Planning Society
- Logistics UK
- Gatwick Airport
- Kent and Medway NHS Trust

4. Communications Activity

4.1 A communications campaign is underway to encourage people and organisations to respond to the consultation. This includes the following:

- a promotional video informing people about the strategy and encouraging them to respond to the consultation;
- an ongoing social media campaign, including short video on the draft Transport Strategy content;
- press releases shared with the technical press, and press across the region;
- briefing packs shared with communications teams within our partners, for them to share with their local press contacts, as appropriate;
- editions of the TfSE Podcast focussing on the draft Transport Strategy.

5. Consultation report

5.1 As reported at the 9 December Partnership Board meeting, a consultation report will be prepared once the consultation has ended. This report will:

- summarise how the consultation was undertaken;
- present an analysis of the responses to the online questionnaire survey and the written responses received;

- identify key findings from the questionnaire survey, written responses, workshops, roadshows; and,
- make recommendations about possible amendments that may needed to the draft Transport Strategy and ISA to reflect the feedback received.

5.2 A copy of the consultation report will be submitted to the July 2025 Partnership Board meeting, alongside a copy of the Draft Final Transport Strategy and ISA. The covering report will identify any proposed changes to reflect the feedback received during the consultation for the Partnership Board to agree.

6. Financial considerations

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

7. Conclusions and recommendations

7.1 In conclusion, the following the approval of the Draft Transport Strategy and ISA for consultation, the consultation exercise has commenced and is ongoing until 7 March 2025. It is recommended that the Partnership Board comment on the progress with the consultation on the Draft Transport Strategy and ISA.

RUPERT CLUBB
Chief Officer
Transport for the South East

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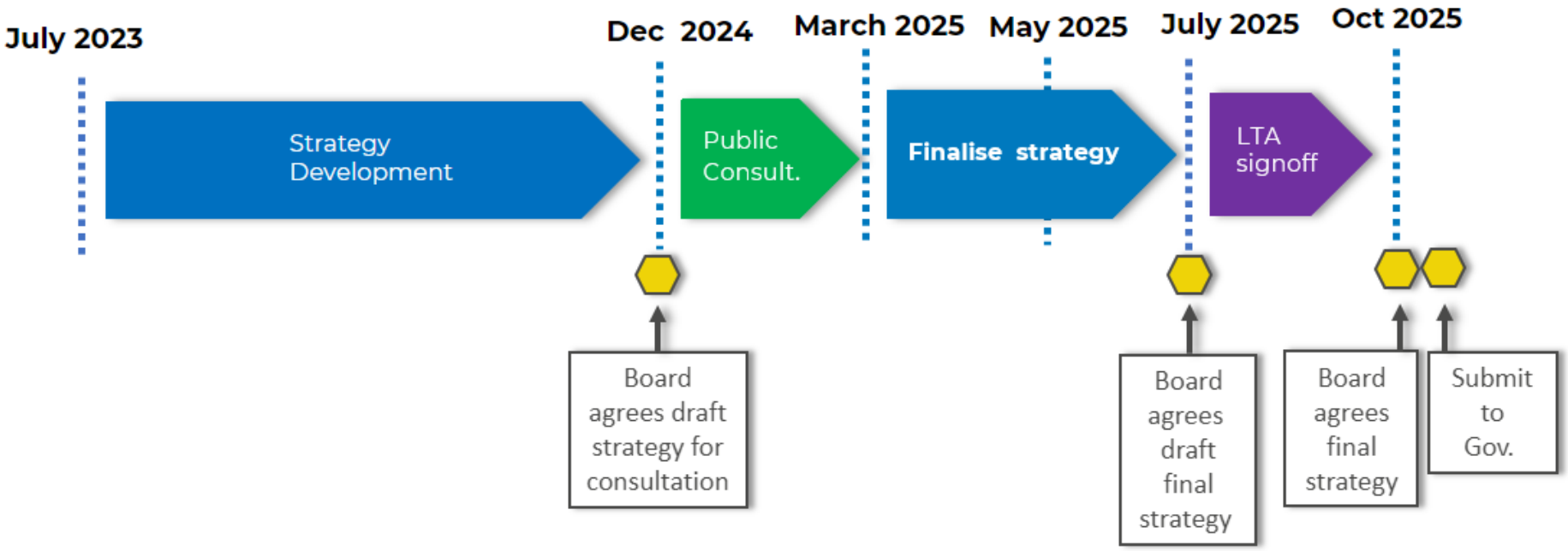
Appendix 1 – Timeline for the Transport Strategy Refresh



Agenda item 13

Report to:	**Partnership Board –Transport for the South East**
Date of meeting:	**27 January 2025**
By:	**Co-Chairs, Business Advisory Group**
Title of report:	**Business Advisory Group**
Purpose of report:	**To update the Partnership Board on the Business Advisory Group**

RECOMMENDATION:

The members of the Partnership Board are recommended to note the recent work of the Business Advisory Group.

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1. Introduction

1.1 The Business Advisory Group (BAG) was formed in October 2024. It is co-chaired by Vince Lucas and Daniel Ruiz. The group provides a business voice to support, advise and contribute to the Partnership Board.

2. Business Advisory Group – recent meetings

2.1 The BAG have met twice since the last Partnership Board meeting virtually.

2.2 The BAG members have finalised their terms of reference asking for there to be a specific focus for the group on economic growth. The members also recognised the importance of using the meeting to record outputs and an opportunity to hear each member's top transport related opportunities and challenges for business.

2.3 The BAG received an update on Transport for the South East (TfSE) noting the work of the draft Business Plan 2025/26, Centre of Excellence and the Transport Strategy Refresh consultation.

3. Business Advisory Group – Opportunities and Challenges

3.1 As set out within the Terms of Reference the meeting would allow each member to raise their top transport related opportunities and challenges for business. The following were identified:

- **Heathrow Western Rail Access** – a specific ask was given to TfSE to provide £10,000 to part-fund Thames Valley Chamber of Commerce to conduct an economic refresh study and confirm TfSE's position on this challenge. Officials

are following up with Thames Valley Chamber of Commerce, along with Network Rail and DfT and will update the Partnership Board in March.

- **Transport-related social exclusion** – the BAG asked if TfSE could develop work on the impacts of poor transport links to health and economic deprivation. Officials highlighted Transport for the North's work on transport-related social exclusion in England. This work offers a good initial evidence base, identifying parts of the TfSE region that suffer from poor transport connectivity and deprivation. Inclusion and integration has been identified as one of TfSE's five missions in the Transport Strategy Refresh. If this is signed off by Government later in this year, this could be a good starting point for additional work.
- **Port of Dover** – EU entry exit system, awaiting implementation date. Impacts to the infrastructure, freight, tourism and local business.

4. Conclusions and recommendations

4.1 The Partnership Board is recommended to note the progress of the Business Advisory Group.

Daniel Ruiz and Vince Lucas
Co-Chairs – Business Advisory Group
Transport for the South East

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Agenda Item 14

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

Date of meeting: **27 January 2025**

By: **Chair of Transport Forum**

Title of report: **Advisory Panel and Transport Forum Update**

Purpose of report: **To update the Partnership Board on the Transport Forum and Advisory Panel.**

RECOMMENDATION:

The members of the Partnership Board are recommended to note the recent work of the Transport Forum and Advisory Panel.

---

1. Introduction

1.1 The fourth meeting of the Advisory Panel took place on 9 January.

1.2 The second in-person meeting of the Transport Forum for 2024 took place on 18 November in Southampton. On 30 January another in person Transport Forum event will be held focussed solely on the draft Transport Strategy.

2. Transport Forum

2.1 The second in person Transport Forum event of 2024 took place on November 18. The Forum took place in Southampton to reflect feedback that we should host more events in the Transport for the South East (TfSE) region, alongside London. The session had good attendance from regional partners including Network Rail, National Highways, local transport authorities and representatives from transport operators and user groups.

2.2 As part of the in-person event stakeholders had the opportunity to hear about the emerging draft Transport Strategy and to ask questions in response. Key themes from attendees were around ensuring accessible consultation materials and clarifying the weight of influence the Transport Forum would have during the consultation. TfSE officers clarified there would be a dedicated session for Transport Forum members, and this is due to take place on 30 January in London. In addition to this dedicated session, Transport Forum feedback will be considered as part of the final consultation report.

2.3 In the second session of the day, attendees were taken through the recent consultation on Devolved Powers and had the opportunity to give feedback. There was notably broad support in the room for many of the powers proposed by TfSE, however the need for some clarification emerged particularly where powers may align with similar powers held by local authorities, or where TfSE could act on their behalf.

Attendees felt that there was a role for TfSE as a statutory consultee in rail strategy and investment but not in day-to-day operations of the rail network.

3. Advisory Panel

3.1 In the meeting on 9 January the Advisory Panel provided feedback on from their thematic groups. The Advisory Panel noted that thematic groups were performing strongly, with good attendance from DfT policy officials.

3.2 The Advisory Panel discussed the Devolution White Paper. The Panel discussed possible rail powers and agreed that it would be helpful for TfSE to provide support to emerging authorities as this is an area where local authorities do not currently have powers.

3.3 The Advisory Panel also felt that TfSE had a key role in ensuring collaborative working between authorities, especially if different areas progress with devolution at different times.

4. Conclusions and recommendations

4.1 It is recommended that the Partnership Board note the work of the Transport Forum and Advisory Panel.

GEOFF FRENCH
Chair of the Transport Forum
Transport for the South East

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Agenda Item 15

Report to:	**Partnership Board –Transport for the South East**
Date of meeting:	**27 January 2025**
By:	**Chief Officer, Transport for the South East**
Title of report:	**Delivery of the Strategic Investment Plan (SIP)**
Purpose of report:	**To provide an update on work to support delivery of the SIP**

RECOMMENDATION:

The members of the Partnership Board are recommended to note the progress of a range of workstreams that support the delivery of the Strategic Investment Plan.

1. Introduction

1.1 This report provides an update on a range of workstreams that support the delivery of the Strategic Investment Plan (SIP).

2. Background

2.1 Delivering the SIP requires several partners, including Transport for the South East (TfSE), local transport authorities, National Highways, Network Rail and DfT, to work closely together to develop and deliver the schemes and policy interventions it sets out. Several different approaches to bring forward schemes are also required, taking account of the different stages of development that schemes are already at and the resources available to TfSE and the delivery partners to progress further work.

2.2 This report provides an update on the work that supports delivery of the interventions, ensuring the required analytical tools are available, supporting our partners as they develop and deliver schemes, and reporting on benefits realisation arising from both the place-based and global interventions included in the SIP.

3. SIP Delivery Action Plan

3.1 The SIP contains nearly 300 multi-modal schemes and policy interventions identified as being required to realise the vision for 2050 as set out in the TfSE Transport Strategy. Delivery will require the input of several different partners working together, and the exact arrangements will need to vary from scheme to scheme.

3.2 The Delivery Action Plan provides a framework for managing and monitoring delivery of the interventions and policies to achieve the region's long-term objectives set out in the SIP. The SIP sets out the necessary investments across the transport network, while the Delivery Action Plan provides insight into how interventions are moving forward, ensuring alignment with local and national priorities.

3.3 The information within the Delivery Action Plan for the SIP has been updated through November and December 2024 via a series of meetings with each delivery

partner independently to review the schemes. The information gathered as part of this exercise informs delivery of the schemes within the SIP and provides great insight to how partners are progressing across the region shaping the support TfSE seeks to provide partners as they bring forward schemes.

3.4 The information in the Delivery Action Plan is fed into the prioritisation framework tool and this update will further improve our ability to filter and prioritise schemes as required.

3.5 We have also been able to collate information regarding the required funding level for scheme development over the next three years based on forecasts of scheme progress and stages planned. This information will be used by TfSE to help make the case for appropriate development funding for delivery partners, ideally with longer term funding certainty. This information will be updated annually as part of the DAP update process.

4. Interactive Story Map

4.1 The Interactive Story Map is an easy map-based tool to help users find the interventions displayed in the SIP, and now includes the information from the updated Delivery Action Plan.

5. Scheme Development Work

5.1 The TfSE budget for 2023/24 included funding to work with partners to support and undertake scheme development work to deliver SIP schemes. This workstream supports delivery partners to progress scheme development through either feasibility study or Strategic Outline Business Case stage in circumstances where they are not able to fund or resource the work themselves.

5.2 Supporting this work will enable a regional pipeline of schemes to be developed in readiness for funding streams when they come on line in the future and will also help make the case for bringing new funding streams online through evidence collated as part of the process.

5.3 The work that is completed also provides content and lessons learnt which is shared with partners through TfSE's Centre of Excellence.

5.4 The four schemes assisted in financial year 2023/4 shown in Table 1 at **Appendix 1** are now complete or completing soon.

5.5 The TfSE budget for 2024/25 included a further funding allocation at an increased level to provide development support. The process used to allocate the funding, and the seven specific schemes to benefit were outlined in the July 2024 Board paper. A reserve scheme had also been identified in the event that the full budget allocation was not taken up, and funding has now been allocated to bringing forward development work on that additional scheme. The approved schemes and their progress are shown in Table 2 at **Appendix 1**.

5.6 Due to budget pressures, it is likely that the level of scheme development support will be reduced in 2025/26. Having a better understanding of the overall status of SIP schemes from the updated DAP and four lists of priority schemes (agreed by the Partnership Board in October 2024) will both support any decisions for the allocation of scheme development support in the next financial year. We have already opened

discussions with Transport Strategy Working Group and Senior Officer Group to discuss how future funding should be allocated if demand continues to exceed availability, and to consider how we can ensure alignment with the new government priorities and TfSE's vision and missions set out in the refreshed Strategy.

6. Major Road Network (MRN) and Large Local Majors (LLM)

6.1 TfSE continue to manage the Major Road Network (MRN) and Large Local Majors (LLM) programmes for the region, providing support to our local transport authority promoters and liaising with DfT on the overall programme. We attended a meeting on the 22 November 2024 supporting both the DfT and PCC regarding City Centre Road MRN Scheme and next steps for the project.

6.2 The scheme development support and the priority lists we submitted to the DfT were intended to support a pipeline of schemes for any future MRN2 programme which we will be keen to discuss with DfT once the policy direction is clearer.

6.3 We will continue to provide further support to scheme promoters, including training and guidance on business case development, through the Centre of Excellence and Analytical Framework.

7. RIS3

7.1 The announcement of the Draft RIS 3 has been delayed and National Highways have been given a one-year extension of RIS2 with an interim settlement. It is our current understanding that the Draft RIS will be published Spring 2025, and we will be maintaining dialogue with both National Highways and DfT as that process evolves.

8. Analytical Framework

8.1 Following the endorsement of the Analytical Framework Routemap at the Partnership Board meeting in May 2024, we have successfully conducted two South East Transport Modelling and Appraisal Forums. These forums included representative officers from 10 out of 16 of our local transport authorities. In the first forum, individual officers discussed the status of their analytical capabilities and capacities and shared issues and challenges they hoped to address in collaboration with their counterparts from other local transport authorities.

8.2 Following the success of the first forum, at the second forum colleagues from Hampshire County Council shared findings from a TfSE-funded study about the future of strategic modelling in Hampshire. This presentation generated valuable discussions about the direction of future modelling efforts. This topic is particularly timely, as many LTAs are currently using pre-pandemic strategy models, which may require updates.

8.3 To help our local officers build confidence in managing analytical projects, we collaborated with subject matter specialists and DfT analysts to deliver a series of webinars on business case development and modelling through the Centre of Excellence. These sessions were very well received and aimed to better equip local officers responsible for overseeing modelling and appraisal projects.

8.4 In the Modelling and Appraisal forum, four priority data gaps were identified by the

officers: journey time by mode, origin-destination matrices, traffic counts, and travel survey data. As a result, we have developed a plan to support these gaps. The table below shows the actions we have taken so far and next steps.

Data Gap	Actions Taken	Next Steps	Benefits for LTAs
Journey time by mode	Investigated options (TRACC, Podaris, Cadence 360); identified Podaris as the best cost-benefit solution.	Explore centralised Podaris subscription for all TfSE LTA's, to ensure equitable access and reduce long-term costs.	Provide essential input data for accessibility analysis and transport modelling, and analytical capabilities through Podaris that can be used to perform accessibility analysis to support planning work, such as BSIP.
Origin-destination matrices	Securing funding for mobile network data (MND); engaging with LTAs to refine data requirements.	Finalise LTA requirements and identify best MND provider.	Provide LTAs with the MND, an essential dataset for modelling, which typically costs £30–60k for LTAs looking to update their transport models. Procuring it through TfSE can be beneficial due to economies of scale.
Traffic counts	Engaging with LTAs to review collection practices and identify regional support opportunities.	Host a forum in January 2025 to focus on data collection techniques and challenges.	Facilitate collaboration among LTAs and TfSE by encouraging data sharing, improving the utilisation of collected traffic data, and promoting consistency.
Travel survey data	Commissioned a regional travel survey with 6,000+ participants, offering robust insights into travel behaviour.	Share travel survey insights with LTA's via an online dashboard with drill-down functionality.	Essential data for understanding travel behaviour in each LTA, serving as key evidence for people-centred decision-making.

8.5 On analytical tool development, we have commissioned the development of a South East Highway Assignment Model (SEHAM) to support internal projects such as the SIP refresh, EVCI, and the Decarbonisation Playbook. It will also serve as a robust foundation for LTAs to develop local models. The first phase of model development is expected to be completed by April 2025.

8.6 On the public transport side, we are finalising the proof-of-concept report, comparing Transport for the North's NoMRS rail model with MOIRA, to help inform whether TfSE should consider developing a SE rail model. The next stage of development will be planned based on the findings of this report to enhance tools that support rail scheme assessments. For bus schemes, functionality to assess impacts on bus journeys will be added to SEHAM in the next phase of the analytical framework development. In the

interim, Podaris, as previously mentioned, offers high-level analytical capabilities and has already been used by some LTAs to support BSIP analyses.

8.7 In 2025, our focus will be on continuing to enhance regional and local modelling capabilities by addressing data gaps, advancing tool development, and fostering collaboration. A more detailed plan is outlined in the table below. These efforts aim to equip LTAs with robust data, tools, and insights to support effective decision-making and sustainable transport planning.

2025 Plan	Description	Timeline	Benefit for LTAs
Launch Travel Behaviour Online Dashboard	Create an interactive dashboard to share travel survey insights, with drill-down capabilities for LTAs.	Jan-March 2025	A quick overview of essential travel behaviour statistics at the regional level, as well as for each LTA, without the need to delve into the raw data.
Procure Mobile Network Data (MND)	Secure MND at the regional level to generate comprehensive travel demand data for model updates.	Jan-May 2025	Provide LTAs with the MND, an essential dataset for modelling, which typically costs £30–60k for LTAs looking to update their transport models. Procuring it through TfSE can be beneficial due to economies of scale.
Develop Travel Market Synthesiser Tool	Build a tool to integrate datasets (MND, travel survey, development data) for localised travel demand projections.	April-August 2025	Provide localised and consistent travel demand forecasts for use in various analyses by LTAs.
Rebase SEHAM to 2024 base year	Rebase SEHAM to 2024 base year with MND and traffic counts data.	August-December 2025	Provide a robust analytical tool for testing road network impacts of SIP interventions. Additionally, supply improved, more localised, data inputs for other tools, such as the EVCI and the Decarbonisation Playbook, which currently rely on National Highways' model.
Collaboration with DfT and Academia	Partner with universities and DfT to trial new tools (e.g. connectivity tool, population synthesiser) and research transport resilience.	Throughout 2025	TfSE is well-positioned to investigate essential yet-to-be-standardised transport analysis, such as resilience, new technologies for transport planning, given

2025 Plan	Description	Timeline	Benefit for LTAs
			its close connections with both the DfT and LTAs.

9. Monitoring and Evaluation Framework

9.1 A clear robust approach to monitoring and evaluation is needed to ensure the successful delivery of the interventions included in the SIP. It is important to ensure this mechanism provides a clear line of sight from the transport strategy's vision through to intervention level objectives, via the Strategic Investment Plan. It is also important to discern the outcomes and impacts of interventions at a regional level to understand how much they contribute to the SIP's (and wider TfSE) objectives.

9.2 The Delivery Action Plan forms the baseline from which monitoring and evaluation of delivery of schemes within the SIP are measured. The information has been updated with the current position of each of the proposed schemes with delivery partners and will be reported in the TfSE annual report. Through this exercise we are able to identify where schemes are progressing, what is in the pipeline and where schemes have faltered or paused.

9.3 Work is underway to gather and analyse data in readiness for the publication of a second "State of the Region report", which will update on the first version that was published in 2023.

9.4 Over time TfSE are improving the evidence base that informs our strategic work and plans. Through our monitoring and evaluation Framework we will be able to ensure that the benefits envisaged are realised and what impact they have on the South East. It will also serve to inform where benefits are maybe not as predicted and enable us to identify why and any lessons to be learned. This will in turn inform future strategy and plans, be shared through the Centre of excellence and with partner STB's to the benefit of our partners, the region and the rest of the UK.

9.5 To support the increasing outputs from the above workstreams, TfSE has been gathering requirements for a central system to store data. Working with our host authority, we have agreed on a PostgreSQL database solution. In 25/26 we will build the data architecture around this central repository, creating a regional data hub.

10. Conclusions

10.1 Board Members are recommended to note the progress of a range of workstreams that support the delivery of the Strategic Investment Plan.

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Appendix 1

Table 1 - Development support schemes – 2023-24

Authority	Scheme	Support for	Level of Support	Status
Kent County Council	Fastrack Optimisation and Extension	Feasibility Study	£51,297	Complete,
Medway Council	New Strood Interchange	Pre-Feasibility Study	£20,000	Complete,
Portsmouth City Council	Cosham Station Mobility Hub	Strategic Outline Business Case	£30,000	Expected Jan 2025
Southampton City Council	West Quay Road Realignment	Strategic Outline Business Case	£100,000	Expected Jan 2025
		Total	**£201,297**	

Table 2 - Development support scheme - 2024-25

Promoting Authority	SIP ref	SIP Scheme Name	Status	Support for:	Award
West Sussex County Council	I16	A259 Chichester to Bognor Regis Enhancement	Underway	SOBC	£100,000
Surrey County Council	N1	London to Sussex Coast Highways (A22 N Corridor (Tandridge) South Godstone to East Grinstead)	Scoping	Feasibility Study	£50,000
East Sussex County Council	N3b & N18	A22 North of Hailsham to Maresfield (MRN Pipeline) Corridor SOBC	Underway	SOBC	£50,000
Berkshire - Wokingham Borough Council	P7, P9, P12, P18, Q1	A4 Berkshire - Quality Bus Corridor and Active Travel Improvements	Underway	Feasibility Study	£75,000
Hampshire County Council	E2	South East Hampshire Area Active Travel	Reviewing Contract	Feasibility Study	£50,000
Brighton & Hove City Council	A2 & A3	A27/A23 Patcham Interchange & Falmer Strategic Mobility Hub	Scoping	Feasibility Study	£50,000
Solent Authorities - NR	G2 & G3	A2 Botley Line Double Tracking & A3 Netley Line Signalling and Rail Service Enhancements	Finalising contract schedules	SOBC	£50,000
				TOTAL	**£425,000**

2024/25 Reserve scheme (funding now committed as a result of an underspend in the budget)

Authority	Reserve for:	SIP Scheme Name
Kent	SOBC	Gatwick-Kent Service Enhancements

Agenda Item 16

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

Date of meeting: **27 January 2024**

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

Title of report: **Technical Programme Progress Update**

Purpose of report: **To provide a progress update on the ongoing work to deliver the technical work programme set out in the 2024/25 business plan**

RECOMMENDATIONS:

The members of the Partnership Board are recommended to:

1) **Comment on the progress with the ongoing implementation of the Centre of Excellence;**
2) **Comment on progress with the work to implement the Electric Vehicle Infrastructure Strategy;**
3) **Comment on the progress with the delivery of the Future Mobility Strategy;**
4) **Comment on the progress with the delivery of the Regional Active Travel Strategy and Action Plan;**
5) **Comment on the progress with the delivery of the Freight, Logistics and Gateways Strategy;**
6) **Comment on the progress work on rail; and**
7) **Comment on the progress with work on decarbonisation.**

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1. Introduction

1.1 The purpose of this report is to provide a progress update on the delivery of a number of elements of the Transport for the South East (TfSE) technical work programme.

2. Centre of Excellence

Context

2.1 The TfSE Centre of Excellence (CofE) was formally launched on 18 June 2024. It was co designed with our local transport authorities (LTAs), to ensure that it was tailored to meet their needs. The site has 15 sections which offer different types of support. These include webinars, data, resources, case studies, key tools and a chat forum.

Work to date

2.2 Areas for support were identified through a capability survey undertaken in April 2024. In response to this, bespoke work has been developed covering several topic areas. These include:

- seven training webinars on specific topics relating to business case development;
- guidance on how to 'prepare for climate change' with supplementary case studies;
- resources to support local authorities in securing development consent orders with supplementary case studies;
- a training webinar on the Sub-national Transport Body (STB) Carbon Assessment Playbook; and
- a training webinar on the STB Electric Vehicle Charging Infrastructure Visualiser tool developed by Transport for the North.

2.3 A pipeline of future content is being maintained and new requests that are received will continue to be assessed through an 'ideas tracker' and if suitable, added and assigned to a subject matter expert to develop the required content.

2.4 Future content has been commissioned for completion before the end of March 2025 and will cover:

- Transport policy and strategy webinar: an introductory webinar for junior members of staff, with a follow up webinar for more senior staff members.
- Securing government funding: a proforma for LTAs to complete to aid decision making about whether to pursue an application for new government funding streams as they arise, with a view to saving officer time on decision making when it comes to business case development and submissions.
- Modelling active travel: expert advice on the first principles on modelling active travel including an overview of a vision and validate approach.
- Support with national plans and guidance: development of policy tools and frameworks that can be utilised by any authority.
- Carbon Assessment Playbook (CAP) Tool - follow up support: 1-2-1 support is being offered to local transport authorities on the use of the CAP tool that was launched earlier this year.

2.5 In addition to the items listed above, notifications about any new Government guidance that is published will be sent out via the CoE mailing list and chat forum. Where possible, the relevant policy representatives will be invited attend a webinar to present this new guidance to LTAs.

Monitoring and evaluation

2.6 In the period between September and November 2024 there were:

- 75 new sign ups (240 now in place in total)
- 44 new pieces of content (211 now in total).

- 1196 total unique site interactions
- 209 attendees at webinars hosted by TfSE

Further outputs from the monitoring and evaluation activity of the CoE can be found in **Appendix 1**. A further progress update on the development of the Centre of Excellence will be presented to the March 2025 Partnership Board**.**

3. Electric Vehicle Charging Infrastructure

3.1 Progress with the work to develop forecasts of the implications of the electrification of commercial vehicle fleets on the demand for electric vehicle charging infrastructure is set out in separate report under agenda item 8.

3.2 TfSE has recently commissioned the consultancy Steer, through the call-off contract framework, to undertake a 'state of the region' report that aims to establish the progress being made with the rollout of EV charging infrastructure across the TfSE area. The work will include engagement with LTAs to identify the key issues and challenges being faced with the rollout of future EV charging infrastructure. This intelligence will then be used to help inform TfSE's future work in this area. This piece of work is expected to be completed by March 2025. A further update on TfSE's work on EV Charging Infrastructure roll out will be presented at the next Partnership Board meeting in March 2025.

4. Future Mobility Strategy

4.1 The latest meeting of TfSE's Future Mobility Forum was held online on 9 December 2024. The theme for the meeting was Procurement. There was a presentation from Richard Lock from Portsmouth City Council on Project Integrated Procurement, which covered key procurement principles, requirements, and solutions. The presentation also provided an overview of the changes that will be enacted by the Procurement Act 2023 which will go into effect in February 2025.

4.2 Conrad Haigh of Solent Transport was re-confirmed as Chair of the Future Mobility Forum for 2025 and the next meeting will be held on 10 March 2025. Meeting theme suggestions from the last meeting were presented to members and voted on. The themes selected for 2025 are Integrated Transport, Travel Hubs, Transport Resiliency, and Data. A further update on the progress of the work on future mobility will be given at the Partnership Board Meeting in March 2025.

5. Regional Active Travel Strategy & Action Plan

5.1 Development of the Regional Active Travel Strategy & Action Plan (RATSAP) began in July 2023 and was completed in September 2024. The aim of the RATSAP is to make walking, wheeling, and cycling an attractive, accessible, and realistic choice for more journeys undertaken across the TfSE area. The RATSAP complements the work being undertaken by the LTAs and seeks to provide a regional picture of active travel and better join up ongoing work across geographical boundaries.

5.2 The draft RATSAP was presented to the Board in October 2024. Following questions and comments raised about the Strategic Active Travel Network map,

constituent LTAs and their district and boroughs who have developed Local Cycling and Walking Infrastructure Plans (LCWIPs) were invited to submit further comments on the map. This work is still ongoing and a further update on any changes that were requested will be provided at the next Partnership Board meeting.

5.3 As outlined in the action plan, meetings of the Regional Active Travel Steering Group are to be continued following completion of the RATSAP. Steering Group is comprised of representatives from each of the 16 constituent LTAs, as well as national and strategic partners including Active Travel England, Homes England, National Highways, Network Rail, Sustrans, and Transport Action Network. The Steering Group met in December 2024 and the meeting focused on identifying the workstreams for RATSAP implementation in the coming year. Knowledge sharing and collaboration between Steering Group members was facilitated through roundtable updates. A further update on the progress of the work on active travel will be given at the Partnership Board Meeting in March 2025.

6. Freight, Logistics and Gateways Strategy

6.1 Work is underway to enhance the Alternative Freight Fuel Infrastructure (ALFFI) tool developed by Midlands Connect STB to improves its usefulness in the TfSE area. The tool can be used to rank and evaluate potential locations for public HGV alternative recharging or refuelling sites. The tool can show where there may be existing demand, where potential sites could be located and where the conditions could be right for additional sites. More local data is in the process of being added and a GIS map is being developed to show where these potential sites would be located in the TfSE area. Once this has been completed TfSE officers will be engaging with our local authority transport and planning officers to demonstrate the use of the tool.

6.2 Another meeting of the Wider South East Freight Forum covering the TfSE, England's Economic Heartlands and Transport East areas, was held on 14 November 2024. The meeting focussed on the ways in which freight and logistics operators and STBs are working to support decarbonisation in the freight sector. Presentations included DP World's project aimed at incentivising mode shift from HGVs to rail at Southampton Port and a presentation from TfSE about its development of ALFFI. A data sub-group is to be set up early in 2025 to explore ways in which freight and logistics operators could more of their data on their delivery network and HGV movements. The next meeting of the Forum on 6 March 2025 will focus on planning issues and ways to improve the process for the benefit of both freight and logistics operators and local authorities.

6.3 A final report on the study investigating the potential for modal shift of freight from road to short sea shipping is expected to be completed for presentation to the Board at their March 2025 meeting. A study examining the level of warehousing provision in the TfSE area are now expected to be completed in time for the Partnership Board meetings in June 2025. This is to allow sufficient time for engagement with stakeholders, including our constituent local transport authorities, on the finding of the work.

6.4 Work on the freight awareness programme has started. This work aims to increase the level of awareness of the needs of the freight sector in public sector organisations (especially those responsible for transport and spatial planning). It also

aims to provide a reference guide to enable the freight and logistics operators to work more effectively with public sector bodies and improve their understanding of their different roles and responsibilities. The work is being undertaken jointly across the TfSE, England's Economic Heartland and Transport East areas. The first phase of the work to be completed by the end of March 2025 is a needs assessment to scope out the content of the programme. This will be followed by a second phase consisting of a series of training events that can run over subsequent years subject to the availability of funding. A further update on TfSE's work on freight and logistics will be presented to the Partnership Board at their meeting in March 2025.

7. Rail

7.1 Work continues on the Intermodal Rail Freight Study project covering the TfSE area. The study aims to develop a clearer understanding of the current and potential demand for increased intermodal transfer of freight between road and rail networks across the TfSE area. Engagement with stakeholders including local authority transport, planning and economic development officers, local freight and logistics operators, Network Rail and the Shadow Great British Railway will take place in January and February 2025. The project is due to be completed in March 2025.

7.2 The last meeting of the Wider South East Rail Partnership was held on 10 January 2025 bringing together the three STBs Transport for the South East, England's Economic Heartland and Transport East with DfT the Shadow Great British Railways, Network Rail and Transport for London (TfL). Updates were given on plans for a rail reform bill and the re-nationalisation of South Western Railway. The STBs' draft Position Paper setting out proposed aims, objectives and ways of working for the Partnership was discussed and the next stage agreed. A progress report was also given on the work that the STBs and TfL are undertaking to investigate how more passengers can be attracted to rail rather than use their cars for cross boundary journeys, including gaining a better understanding of current mode share and barriers to greater rail use.

7.3 Work on the development of Rail Strategy Scoping for the TfSE is due to commence in April 2025/26 subject to the availability of funding. This will aim to develop a stronger evidence base with which to advise the Secretary of State, Great British Railways and the Office for Road and Rail and its partner local authorities on the rail priorities for the TfSE area. A further update on the progress of the work on rail will be given to the Partnership Board Meeting in March 2025.

8. Joint work on decarbonisation

8.1 As reported to the Board in October 2024, the joint STB Carbon Assessment Playbook was launched in August 2024. The tool enables the baseline carbon emissions and trajectories to net zero in each of the LTAs to be identified. Each LTA is then able to assess the carbon reduction potential of the proposed transport interventions included in their local transport plans. To help LTAs become more proficient in using the tool, a programme of 1-2-1 support is being offered to enable representatives from the LTAs to meet the consultant that developed the tool to ask any questions they may have about its use. A further webinar on the practical use of the tool is currently being planned as well as a number of potential enhancements to the tool that are to be undertaken jointly by the STBs in 2025-6, subject to the availability of

funding. A further update on the progress of the development of the Carbon Assessment Playbook will be given at the Partnership Board Meeting in March 2025.

9. Financial considerations

9.1 The decarbonisation work set out in this report has been funded from the additional in-year funding awarded to TfSE in January 2022. The future mobility strategy, freight strategy, electric vehicle strategy implementation work, regional active travel strategy development and rail work are being funded from the DfT grant funding for 2024/25.

10. Conclusions and recommendations

10.1 Members of the Partnership Board are recommended to comment on the progress that has been made with the various elements of the TfSE technical programme set out in this report. A further progress update report will be presented to the Board at their meeting in March 2025.

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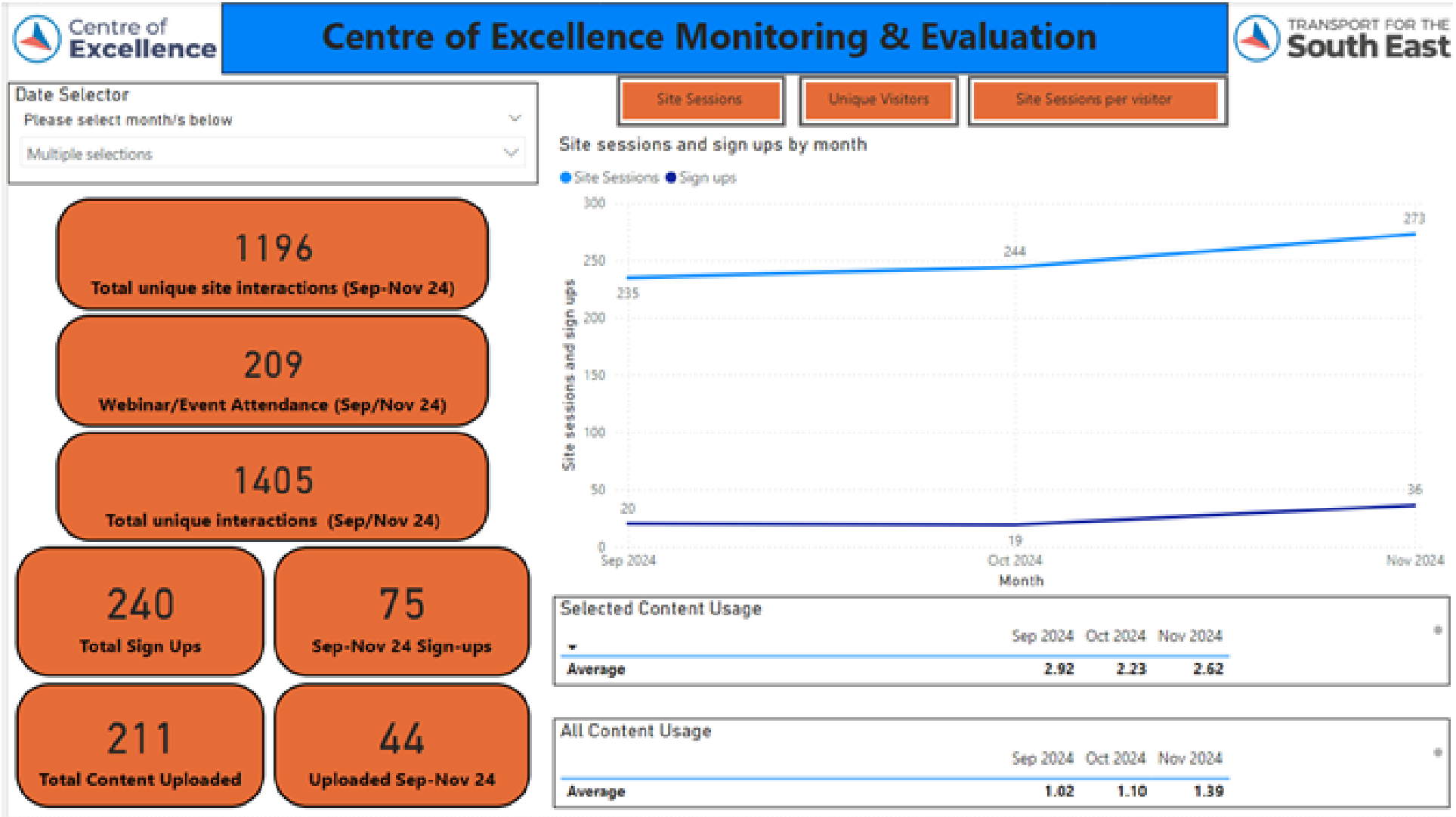
Appendix 1- Centre of Excellence Monitoring and Evaluation September 2024 – November 2024



Centre of Excellence Monitoring & Evaluation

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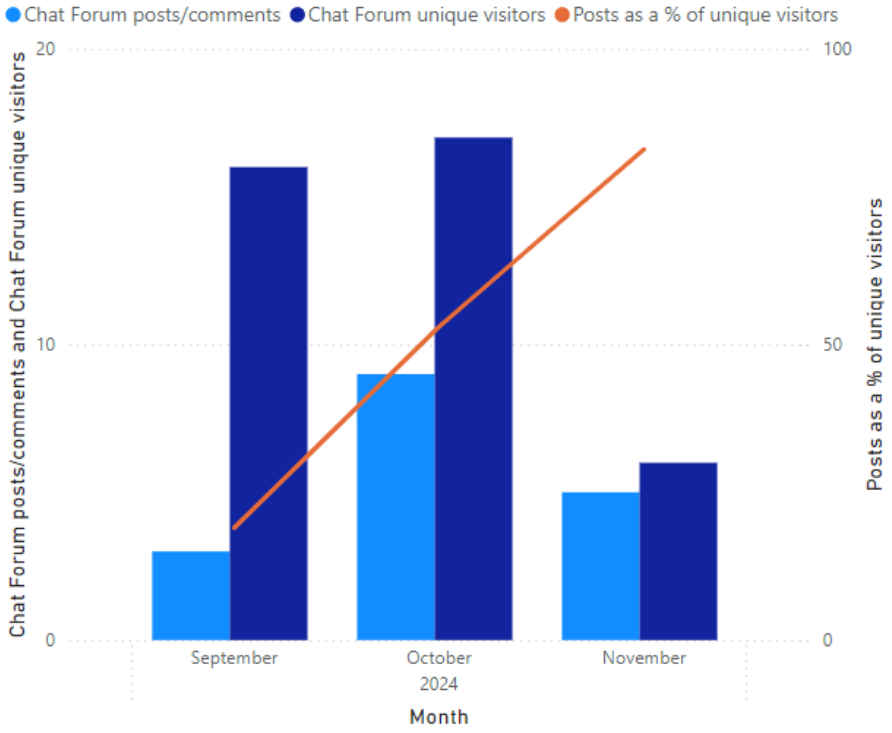
TRANSPORT FOR THE South East

Date Selector for chat forum interaction

Please select month/s below

Multiple selections

Chat Forum interaction



Number of unique visitors per component home page

Title	Sep 2024	Oct 2024	Nov 2024	Total Sep-Nov 24
resources	14	14	18	46
case-study	13	13	16	42
forum	16	17	6	39
key-tools	11	9	14	34
webinars	11	10	13	34
events	13	6	10	29
data	7	3	17	27
qualifications-and-courses	5	5	12	22
funding	4	4	6	14
procurement	2	5	7	14
consultations	2	3	6	11
contact	2	1	6	9
new-to-the-sector	2	2	5	9

Number of unique visitors for specific pages

Title	Sep 2024	Oct 2024	Nov 2024	Total Sep-Nov 24
key-tools- carbon-assessment-playbook	13	11	11	35
webinars- department-for-transport-(dft)-|-abods-training	0	0	25	25
webinars- evci-	15	8	0	23
case studies- red-routes	14	5	2	21
key-tools- stb-ev-charging-infrastructure-framework	7	5	5	17
resources- guidance-preparing-for-climate-change-	7	7	3	17
webinars- launch-of-the-stb-carbon-assessment-playbook	12	2	2	16
resources- department-for-transport-business-case-preparation-|-modelling-and-appraisal-self-assessment-toolkit	0	0	15	15

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TRANSPORT FOR THE South East

Selected Content Usage

Month	Sep 24	Oct 24	Nov 24
case studies- walking-and-cycling-index	0.00	1.00	6.00
case studies- strood-interchange-pre-feasibility-study	2.00	3.00	1.00
case studies- shared-transport-evidence-base-(for-local-plan-development)	0.00	0.00	2.00
case studies- school-streets-scheme	3.00	7.00	3.00
case studies- red-routes	14.00	5.00	2.00
case studies- pla-zero-emission-crossings-â€"-thames-river-crossing-study	4.00	2.00	2.00
case studies- newhaven-port-access-road-business-case	1.00	0.00	1.00
case studies- lower-thames-crossing-development-consent-order	1.00	2.00	2.00
case studies- local-cycling-and-walking-infrastructure-plans-community-consultation-and-engagement	3.00	5.00	1.00
case studies- gatwick-northern-runway-development-consent-order	4.00	1.00	2.00
case studies- fastrack-extension-and-optimisation-study-part-1	5.00	1.00	0.00
case studies- climate-assembly---brighton-&-hove	1.00	1.00	1.00
case studies- a22-major-road-network-carbon-management-plan	0.00	1.00	11.00
Average	**2.92**	**2.23**	**2.62**

Content Feedback Scores

Content	Satisfaction Score	Usefulness Score
Deep Dive Decarbonisation and climate resilience (Business Case Development Series)	4.25	4.67
Funding & Financing Webinar (Business Case Development Series)	4.63	4.50
How to review a business case webinar (Business Case Development Series)	4.33	4.11
Modelling Approaches Webinar (Business Case Development Series)	4.00	3.33
Strood Risk Approach Webinar	4.50	4.00
Average	**4.34**	**4.12**

Agenda Item 17

Report to:	**Partnership Board –Transport for the South East**
Date of meeting:	**27 January 2025**
By:	**Chief Officer, Transport for the South East**
Title of report:	**Communications and Stakeholder Engagement update**
Purpose of report:	**To update the Partnership Board on communications and stakeholder engagement activity**

RECOMMENDATION:

The members of the Partnership Board are recommended to note the engagement and communication activity that has been undertaken since the last Partnership Board meeting.

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1. Introduction

1.1 This paper provides an update on communications and engagement activity undertaken since the last Partnership Board meeting, including support provided to technical projects, stakeholder meetings, media activity and recent and upcoming events.

2. Recent communications and engagement activity

2.1 Transport for the South East (TfSE) continues to support the implementation of communication and engagement activity across our technical work programme, and lead the communications work for the Wider South East Freight Forum, working with our Sub National Transport Body (STB) colleagues at Transport East (TE) and England's Economic Heartland (EEH).

2.2 Our plan to contact all the new MPs in the TfSE region and offer a face-to-face or virtual meeting remains, and this will continue into the New Year.

2.3 We are delivering against the objectives set in the 2024/25 communications and engagement plan, with activity supported by web content, social media coverage, our monthly newsletter and podcast. Video content and infographics has helped to enhance our social media engagement as we continue to increase follower numbers, and this will also feature in our activity planned to support the Transport Strategy Refresh in 2025.

3. Transport Strategy Refresh stakeholder engagement

3.1 Our public consultation on the draft Transport Strategy began on 10 December. To support this, a number of engagement and communications activities are underway or are planned during the consultation period to March 7. As part of this, we have

created and distributed media packs to our local authorities and key partners to help us promote the consultation, and we continue with our own social media promotion. Bespoke podcasts are planned to support the consultation as well as emails to our regional MP's. To engage the wider public, we are also hosting a number of roadshows across the region, where TfSE officers will staff an exhibition stand and answer questions from the public on the draft Transport Strategy,

4. Events and speaker slots

4.1 Past events

- East Sussex Association of Local Councils & West Sussex Association of Local Councils Joint Committee, Brighton, 4 November – Mark Valleley presented an update on the ongoing work at Transport for the South East.
- Transport Select Committee, Private Briefing, 27 November – Rupert Clubb attended alongside the other STB Chief Officers to provide a briefing on the role of STBs and the transport priorities of the different STB regions.

4.2 Future events/ speaker slots

- Future Transport Forum, 22 January – 23 January 2025.
- STB Conference 4 March – 5 March 2025.

5. The TfSE Podcast

5.1 Recent podcast episodes have covered our neighbouring STB partner, Transport East, and the challenges and opportunities within their region, the accessibility of the transport sector, and scheme development. Future podcasts planned include Healthy Streets, buses and our year ahead.

6. MP engagement and public affairs

6.1 We have contacted every new MP in the TfSE region requesting an introductory meeting and have started to receive positive responses. This has taken time as Parliament was in recess for all of August and many MPs had yet to set up their offices and recruit staff.

6.2 Since the last Partnership Board meetings have taken place with the following new MPs: Portsmouth North MP Amanda Martin (28 Oct), Sittingbourne and Sheppey MP Kevin McKenna (28 Oct) Wokingham MP Clive Jones (18 Nov) and Surrey Heath MP Al Pinkerton (8 January). There are also a small number of meetings which have been cancelled at short notice which we are looking to reschedule.

7. Delivering against our Communications and Engagement Plan

7.1 We continue to keep our communications and engagement activities under review following the priorities and objectives outlined in the Communications and Engagement Plan for 2024/25.

7.2 We have exceeded our podcast listens target for 2024/25. We will continue to produce monthly podcasts and seek new and varied transport topics to cover that will be of interest to our audience in 2025.

7.3 Further progress has been made towards increasing our reach on social media to 2000 followers. TfSE have gained 30 new followers on LinkedIn since October and impressions on Facebook has increased by 284.

7.4 The success of our 'Your Voices' campaign, including over 1,500 responses and promotion from MPs and local councils across the TfSE region, has inspired the communications plan for our draft Transport Strategy.

8. Integrated National Transport Strategy Roadshows

8.1 As part of the Department for Transport's work to develop an Integrated National Transport Strategy for England, they plan to host roadshows in each STB region to capture the views of regional stakeholders. The Department for Transport have asked Transport for the South East's assistance in identifying key stakeholders. We expect the TfSE roadshow to take place in Brighton on 27 February, but we are waiting on final confirmation of this.

9. Recommendations

9.1 The Partnership Board are recommended to note and agree the engagement and communication activity that has been undertaken since the last Partnership Board meeting.

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