Transport for the South East
Partnership Board Meeting

Agenda - AGM

Monday 13 July 2026, 14:00-17:00
In person – One Great George Street, London

Partnership Board Members		
Cllr Simon Curry (Deputy Chair) Cabinet Member, Climate Change and Strategic Regeneration Medway Council	Cllr Andy Woolley Leader East Sussex County Council	Cllr Trevor Muten Cabinet member for Transport, Parking and Public Realm Brighton & Hove City Council
Cllr John Ennis Lead Councillor for Climate Strategy and Transport Reading Council *(representing BLTB)*	Cllr Julie Jones-Evans Member of Economy, Regeneration, Transport and Infrastructure Isle of Wight Council	Cllr Spencer Dixon Deputy Cabinet Member for Highways and Transport Kent County Council
TBC Hampshire County Council	Cllr Peter Candlish Cabinet Member for Transportation Portsmouth City Council	Daniel Ruiz Business Representative *(co-chair Business Advisory group)*
Cllr Matt Furniss Cabinet Member for Transport and Infrastructure Surrey County Council	TBC West Sussex County Council	Cllr Jacqui Rayment Cabinet Member for Transport Southampton City Council
Vince Lucas Business Representative *(co-chair Business Advisory group)*	Shamal Ratnayaka Aviation Strategy Lead Transport for London	Cllr Matt Boughton Leader Tonbridge & Malling Borough Council *(jointly representing District and Borough Councils)*
Mark Potter South Downs National Park Authority *(Representative from Protected Landscapes)*	Richard Leonard Network Planning Director National Highways	Stuart Kistruck Network Rail (Southern Region)

Guests:

Apologies: Dave Hooper (Network Rail), Cllr Peter Osborne (Kent County Council)

Item		Who
1	**Welcome and Apologies**	Cllr Simon Curry
2	**Minutes from last meeting (p4 -17)**	Cllr Simon Curry
3	**Declarations of interest**	Cllr Simon Curry
4	**Statements from the public**	Cllr Simon Curry
For Decision		
5	**Governance (p18-22)** *(Election of the Chair and Vice-Chair, co-opting Board members and allocating votes)*	Rupert Clubb
6	**Accountable Body Status (p23-26)**	Rupert Clubb
7	**TfSE Future Funding Model (p27-29)**	Rupert Clubb
8	**Annual Report 2025/26 (p30-67)**	Rupert Clubb
9	**Business Plan 2026/27 (p68-99)**	Rupert Clubb
10	**Analytical Framework Update (p100- 117)**	Sarah Valentine
11	**Advisory Panel and Transport Forum (p118- 119)**	Rupert Clubb
12	**Finance Update (p120- 122)**	Sarah Valentine
For Information		
13	**Electric Vehicle On-Street Charging Solutions (p123-238)**	Benn White
14	**Centre of Excellence Workplan (p239- 251)**	Mark Valleley / James Boyes
15	**Technical Programme Update (p252- 256)**	Mark Valleley
16	**Delivery of the Strategic Investment Plan (p257-261)**	Sarah Valentine
17	**Communications Plan 2026/27 and Communications and Stakeholder update (p262- 265)**	James Boyes
18	**Business Advisory Group (p276-277)**	Daniel Ruiz/Vince Lucas
19	**AOB**	Rupert Clubb
20	**Date of Next Meeting** Monday 19 October 2026, 14:00-17:00, London	Rupert Clubb

Officers in Attendance

Rupert Clubb	Transport for the South East
Sarah Valentine	Transport for the South East
Mark Valleley	Transport for the South East
Eleanor Jewell	Transport for the South East
James Boyes	Transport for the South East
Jaimie McSorley	Transport for the South East
Benn White	Transport for the South East

Carolyn Mckenzie	Surrey County Council
Chris Maddocks	Reading Borough Council
Hayley Chivers	Portsmouth City Council
Natalie Wigman	Hampshire County Council
Pete Boustred	Southampton City Council
Stewart Chandler	Isle of Wight
Bartholomew Wren	Tonbridge & Malling Council
Darryl Hemmings	West Sussex County Council
Jeremy Galilee	Medway Council
Charles Field	Brighton and Hove City Council
Joseph Ratcliffe	Kent County Council

TfSE Partnership Board
19 March 2026
Minutes - *draft*
In person - London

Partnership Board Members

Cllr Simon Curry (Vice Chair) Cabinet Member, Climate Change and Strategic Regeneration Medway Council	Cllr Penny di Cara East Sussex County Council *On behalf of Cllr Glazier*	Cllr Joy Dennis Cabinet Member for Highways and Transport West Sussex County Council
Cllr Paul Fuller Member of Economy, Regeneration, Transport and Infrastructure Isle of Wight Council	Cllr Lulu Bowerman Executive Member for Highways and Waste Hampshire County Council	Cllr Matt Furniss Cabinet Member for Transport and Infrastructure Surrey County Council
Cllr Peter Candlish Cabinet Member for Transport Portsmouth City Council	Vince Lucas Business Representative *(co-chair Business Advisory group)*	Geoff French CBE Chair Transport Forum
Stuart Kistruck Network Rail *On behalf of Dave Hooper*	Dan Taylor Deputy Director Department for Transport	

Guests:

- Edmund Cassidy (Steer)
- Steven Bishop (Steer)

Apologies:

- Cllr Sophie Cox, *representing District and Boroughs*
- Cllr Matt Boughton, *representing District and Boroughs*
- Cllr Trevor Muten, Brighton and Hove City Council
- Cllr Alexander Winning, Southampton City Council
- Cllr John Ennis, Reading Borough Council
- Cllr Peter Osborne, Kent County Council
- Daniel Ruiz, Business representative
- Shamal Ratnayaka, Transport for London

Officers attended:

- Rupert Clubb, Transport for the South East
- Sarah Valentine, Transport for the South East
- Keir Wilkins, Transport for the South East
- James Boyes, Transport for the South East
- Emily Bailey, Transport for the South East

- Jaimie McSorely, Transport for the South East
- Eleanor Jewell, Transport for the South East

Item	Action
1. Welcome and Apologies	
1.1 Rupert Clubb (RC) noted that Councillor Simon Curry (SC) will be chairing this meeting, standing in for the Chair Cllr Glazier. 1.2 Cllr Curry passed on Cllrs Glazier's apologies today, who is unable to attend due to personal reasons. 1.3 Cllr Glazier dialed in to the beginning of the meeting to emphasise how important TfSE has been to him as the inaugural Chair of TfSE, since its founding in 2017. Cllr Glazier thanked Board Members, Local Authority officers, and the team at TfSE for all their support and hard work. 1.4 Cllr Curry informed Members that Cllr Keith Glazier will be standing down at the election. The Board paid tribute to the founding Chair, recognising his leadership since 2017 in establishing Transport for the South East as a credible pan-regional partnership, and thanked him for his integrity, judgement and lasting legacy. 1.5 SC welcomed Members to the meeting, and introduced Cllr Penny di Cara, representing East Sussex County Council. 1.6 Apologies were noted from: - Cllr Peter Osborne, Kent County Council - Cllr Alexander Winning, Southampton City Council - Cllr Trevor Muten, Brighton and Hove City Council - Cllr Matt Boughton, Tonbridge & Malling Borough Council - Cllr Sophie Cox, Leader, Worthing Borough Council - Richard Leonard, National Highways - Shamal Ratnayaka, Transport for London 1.7 SC noted that Cllr Osborne has submitted a letter with comments on papers that have been circulated. This will be raised under their respective agenda items during the meeting. 1.8 SC thanked Members for their contributions and efforts over the last twelve months. In addition, SC thanked Keir Wilkins, who leaves TfSE after more than two years, as his secondment concludes and heads back to DfT. 1.9 SC thanked Cllr Sophie Cox, who will be standing down from the TfSE Partnership Board membership. 1.10 SC thanked Cllr Joy Dennis for her contributions to the TfSE Partnership Board. 1.11 Dan Taylor (DT) thanked Cllr Glazier on behalf of DfT.	

2. Minutes from last meeting	
2.1 The minutes of the previous meeting were agreed.	
3. Declarations of Interest	
3.1 Cllr Curry 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 Curry confirmed that no statements from the public have been made.	
5. Strategic Investment Plan Refresh	
5.1 SC drew attention to the comments submitted by Cllr Osborne on the Strategic Investment Plan (SIP): "Congratulations to the TfSE team for pulling together this refresh. I am pleased that it reflects a range of priorities we have for Kent and the alignment with the KCC Local Transport Plan means that our combined efforts should help steadily deliver the improvements our region much needs and deserves. My officers confirm that many of their comments have been successfully actioned and those that remain to correct factual errors can be addressed in due course. I look forward to seeing the Plan supported by the Board and published to lend weight to the case for the region receiving favourable further funding settlements and bespoke grants for those major schemes retained by the Department for Transport for funding decisions." 5.2 SC introduced Sarah Valentine (SV) and Edmund Cassidy (EC) who presented the final TfSE Strategic Investment Plan and Integrated Sustainability Appraisal (ISA) for the Board, highlighting the good engagement from stakeholders, strong support through the targeted engagement period, and minimal amendments required. The final SIP has been updated to reflect the refreshed and recently adopted Transport Strategy and incorporates new schemes and aligns with new government policy. 5.3 The SIP has been approved by the Partnership Board Task and Finish Group, with Member's comments incorporated into the final version. 5.4 SV noted that, subject to Board approval, the SIP would be published and submitted to government, setting out the region's advice on transport investment priorities for the South East. 5.5 Cllr Joy Dennis (JD) raised several points for consideration:	

- The future implications of autonomous vehicles and potential efficiencies in car usage and public funding.
- While recognising the complementary role of e-scooters for first/last- -mile journeys, JD highlighted that walking and cycling are generally preferable alternatives.

5.6 SV noted that ongoing and future TfSE workstreams would support consideration of these issues.

5.7 JD also raised several scheme -specific concerns:

- A23 enhancements: These are already prioritised within the Homes England plan, but shown in the SIP as for delivery in the mid term;
- A24 dualling to Horsham: noted also for delivery in the mid-term JD expressed concern regarding the environmental impact, particularly on ancient woodland, and questioned whether a viable business case could be achieved given that disbenefits may outweigh benefits.
- Resilience and diversions: JD asked how many users divert onto local roads during disruptions and the resulting implications for resilience. Queried how TfSE could work with SatNav operators to mitigate inappropriate routing.

5.8 SV confirmed that TfSE is working with local authorities to clarify roles and responsibilities and develop future workstreams relating to scheme delivery and network resilience.

5.9 Additional queries raised by JD:

- Figure 13: JD suggested a clearer breakdown between local authority capital, National Highways, and Network Rail funding splits in the 2020-24 period would be useful.
- Air quality: JD noted that many junction -level air quality issues have reduced due to cleaner vehicle technology, and that some air quality management areas are now being revoked. SC confirmed this trend within Medway.
- Brownfield sites: JD noted that industrialisation of brownfield land is less relevant in parts of the South East.
- A27 at Arundel
- JD queried whether schemes listed as red against the strategic connectivity mission (predominantly A27) are realistically achievable and whether they should be treated differently in future prioritisation.

5.10 SV noted that options for resolving the challenges along the A27 corridor will be explored through a dedicated funding and financing workstream, scheduled for development during 2026/27.

5.13 RC reminded Members of the Transport Strategy adopted in October 2025, noting that the SIP coalesces the Strategy's Missions and forms the basis of formal advice to the Secretary of State.

5.14 SV invited Steven Bishop (SB) to comment on the SIP's funding breakdown. He noted challenges in reconciling datasets from national agencies and local authorities but offered to provide further disaggregation where helpful. Members supported including more detail on local authority spend, potentially via the Annual Report. 5.15 SC noted that bus and cycle journeys continue to recover post-Covid, although pre--pandemic patronage is not expected until 2029. 5.16 VL challenged the presentation of 'fewer car trips' within the SIP, suggesting that interventions may not reduce car use compared to 2026 levels, but may reduce the growth in car trips or distance travelled. VL asked whether the narrative could better reflect this. EC noted that improved public transport services remained central to encouraging modal shift. 5.17 Cllr Paul Fuller (PF) added that working from home trends are reshaping journey patterns, with increasing leisure trips but fewer commuting trips. SV clarified that the SIP figure of 1.4 million fewer car trips figure is 1.4m fewer than there would be under a business as usual scenario, where car trips are expected to grow based on modelling using government growth assumptions. SV confirmed that the impacts of working -from home are being- addressed through the analytical framework. 5.18 RC responded to the discussion on the projected number of car trips. He emphasised that investment in public transport is essential to providing people with genuine travel choices. While modelling can estimate future trip numbers, these estimates only translate into behavioural change if supported by sustained investment in alternative modes. RC noted strong evidence demonstrating that improvements to bus services increase patronage and can reduce car use, particularly where journeytime savings are delivered. He clarified that the modelling indicates- there would be *more* car trips under a business as usual scenario and if all the SIP interventions are delivered. However, there would be approximately 1.4 million additional car trips without the SIP interventions. The narrative in the SIP aims to articulate this distinction but will be reviewed in light of the comments made. 5.19 Cllr Lulu Bowerman (LB) referenced the Healthy Streets approach being used locally. SV confirmed this aligns better with local rather than regional schemes, and was included a recent Centre of Excellence webinar around design guidance. 5.20 Cllr Peter Candlish (PC) asked whether the SIP distinguishes between rural and urban trip patterns, noting that public-transport investment reduces car trips in some areas, while the picture differs across the wider region. He suggested that a sentence acknowledging these spatial differences would be helpful. 5.21 RC asked whether Members were content to delegate authority to Rupert Clubb to finalise the SIP incorporating the amendments raised. 5.22 Dan Taylor (DT) emphasised the Department's continued willingness to work jointly with TfSE and local authorities at a regional level.	

5.23 The recommendations were **agreed** by the Partnership Board. ***RECOMMENDATIONS:*** The Members of the Partnership Board are recommended to: 1) Note the outcomes of the recent targeted engagement; and 2) Agree the refreshed SIP and its associated Integrated Sustainability Appraisal	
6. Technical Call Off Contract	
6.1 SC invited Sarah Valentine (SV) to introduce this item. 6.2 SV highlighted that the call off contract is currently contracted with the Steer consortium awarded by the Board in 2023, and continues to perform strongly, enabling efficient delivery of the technical work programme. 6.3 With significant work required in 2026/27 and future funding beyond 2027 and governance arrangements still uncertain, extending the current contract will provide stability and maintain delivery capacity. The recommendations were **agreed** by the Partnership Board. ***RECOMMENDATION:*** 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 through a period of uncertainty; 2) approve an implicit modification for extension of the current technical call off contract for an additional 12 months and an increase in value of up to a further £2,000,000.	
7. Amendments to constitution	
7.1 SC introduced Rupert Clubb (RC) who provided an update to Members on forthcoming governance changes. 7.2 RC advised that devolution proposals and local government reorganisation (LGR) will require amendments to TfSE's governance framework. These changes are expected to affect TfSE's membership structure and representation arrangements and will necessitate updates to both the Constitution and the Inter-Authority Agreement. 7.3 RC reported that, in line with recommendations from the Audit and Governance Committee, TfSE will need to consider how highway authorities are appropriately represented on the Board within the future governance structure. 7.4 RC informed the Board that East Sussex County Council, the current accountable body, will no longer be a local transport authority under future arrangements. Initial discussions have therefore been held with the	

emerging Sussex and Brighton Combined Authority to understand whether they would be willing to assume the role of TfSE's accountable body. The board supported this approach. 7.5 Cllr Joy Dennis (JD) shared the Committee's reflections, noting that LGR and devolution will have significant implications for TfSE's governance. JD emphasised that the Constitution must remain flexible in order to adapt to forthcoming regional changes. 7.6 RC asked the Board for approval to develop a detailed paper for the July meeting, setting out recommendations for future governance arrangements and required changes to the constitutional framework. 7.7 The recommendation was **agreed** by the Partnership Board. ***RECOMMENDATION:*** The Members of the Partnership Board are recommended to agree for the Chief Officer to present a further paper to the July AGM Partnership Board.	
8. Finance Update	
8.1 SC introduced Keir Wilkins (KW), who provided an update on TfSE's financial position to the end of February 2026. 8.2 KW reported that expenditure to date stands at £2.216m, and that the end of financial year forecast is £2.923m against the approved budget of £3.807m. 8.3 KW outlined the rationale for the reduction in forecasts since the previous Board meeting. Variations are primarily attributable to rescoped activity, efficiency savings, and additional local authority contributions. Staffing costs remain in line with expectations. 8.4 KW reminded Members that local authorities had agreed that contributions for 2026/27 would remain at the same level as 2025/26, and local authorities will be contacted in April to request purchase orders. 8.5 JD reflected on recent discussions at the Audit and Governance Committee regarding financial planning and welcomed the move toward tighter and more accurate forecasting in future years. 8.6 The recommendation was **agreed** by the Partnership Board. **RECOMMENDATION:** The Members of the Partnership Board are recommended to note TfSE's financial position to the end of February 2026.	
9. Audit and Governance Committee	
9.1 SC introduced Cllr Joy Dennis (JD), Chair of the Audit and Governance Committee, who provided an update on the Committee meeting held on 5 March 2026.	

9.2 JD outlined the discussion that was had related to local government reorganisation and devolution, and the significant implications it could have for TfSE's future governance framework. Amendments to constitution and IAA were suggested. 9.3 JD summarised the updates made to the strategic risk register, highlighting the adjustments agreed by the Committee. 9.4 JD expressed thanks to Peter Duggan (PD) for providing a Rail Reform update at the meeting, which was well received by Committee Members. 9.5 SC emphasised the importance of the Annual General Meeting in July, noting that the position and representation of highway authorities will be a key area for consideration. 9.6 The recommendation was **agreed** by the Partnership Board. ***RECOMMENDATION:*** The Members of the Partnership Board are recommended to comment on the discussions and actions arising at the meeting of the Audit and Governance Committee	
10. Responses to consultations	
10.1 RC provided an outline of the three consultations TfSE have responded to since the previous Partnership Board. 10.2 JD highlighted the importance of grid connection, and its affordability. 10.3 The recommendations were agreed by the Partnership Board. ***RECOMMENDATIONS:*** The Members of the Partnership Board are recommended to: 1) Agree the draft response to the House of Commons Transport Committee's Call for Evidence – 'Supercharging the EV transition'. 2) Agree the draft response to Ministry of Housing, Communities and Local Government Consultation on National Planning Policy Framework: proposed reforms and other changes to the planning system 3) Agree the draft response to Department for Transport and Office for Zero Emissions Vehicles' consultation on New HGV CO2 emissions regulatory framework for the UK	
11. Analytical Framework Update	
11.1 SV provided an update on progress with the Analytical Framework. Key areas of progress include: • Publication of regional travel survey factsheets, covering each sub-region as well as the South East as a whole. • Development of a shared regional data architecture, enabling improved consistency and comparability across datasets. • Review of emerging mobility and freight datasets, to ensure the framework reflects new travel behaviours and sectoral trends.	

- Development of analytical tools, including the Travel Market Synthesiser and updated SEHAM models.
- Expanded engagement with local transport authorities (LTAs) and national partners to support collaborative development and application of the framework.

11.2 SV encouraged officers to make contact regarding the survey outputs, noting that the team can provide bespoke analysis for individual authority areas where required.

11.3 With confirmation of 2026/27 funding, SV confirmed that work is now underway with consultants to determine the most effective and efficient delivery approach for the next phase of the Analytical Framework.

11.4 SV noted that the July Board meeting will include an item on the Analytical Framework routemap, setting out the planned programme of work.

11.5 SC emphasised the critical importance of high-quality data in underpinning all aspects of TfSE's work. He highlighted the growing value of the TfSE data offer, noting that in future, when partners and stakeholders seek to understand what is happening across the transport sector in the South East, TfSE will be recognised as the primary source of trusted regional evidence. SC stressed that this will play a significant role in strengthening TfSE's case for future investment and demonstrating the organisation's ongoing strategic value.

11.6 The recommendation was agreed by the Partnership Board.

RECOMMENDATION:
The Members of the Partnership Board are recommended to comment on the progress with the development of an analytical framework.

12. Delivery of the Strategic Investment Plan

12.1 SV provided an update on work that supports delivery of the interventions in the SIP.

12.2 SV reported that over the last three financial years, TfSE has provided over £800k of funding to local authorities to help progress priority schemes. This support has enabled work on 14 schemes, contributing to a strong and positive future delivery pipeline and helping authorities move projects forward more effectively.

12.3 SV confirmed that TfSE is now considering, through the Centre of Excellence, how best to continue supporting local authorities in the future, particularly in the absence of direct funding allocations to authorities.

12.4 SV noted that the Department for Transport completed a Major Road Network (MRN) review in 2025, with publication expected in Spring 2026. An announcement on RIS3 is still awaited. TfSE will continue to work closely with DfT and National Highways and will continue to make the case for schemes across the South East.

12.5 The recommendation was noted by the Partnership Board. ***RECOMMENDATION:*** The Members of the Partnership Board are recommended to comment on the progress of a range of workstreams that support the delivery of the Strategic Investment Plan.	
13. Centre of Excellence Update	
13.1 Emily Bailey (EB) provided an update on delivery against the 2025/26 workplan, along with progress on monitoring and evaluation activity since February. 13.2 EB highlighted that the capability survey is currently live. Responses will directly inform how the £250k budget for 2026/27 is allocated, ensuring support is targeted where it is most needed. EB encouraged Members to ask their officers to complete the survey so that TfSE can obtain the best possible regional picture of capability and need. 13.3 EB outlined the timetable for next steps, noting that the draft 2026/27 workplan will be shared with the Steering Group on 13 May, before being presented to the Partnership Board on 13 July. 13.4 EB shared key monitoring and evaluation findings from December to February: • £553,856 in cost savings were achieved across the 16 LTAs, equating to £34,616 per LTA. • This represents a saving of £74 per participant across attendees of webinars and events. • There were 390 sign-ups to Centre of Excellence activities during the period. • 431 pieces of content were accessed or downloaded. • The Carbon Assessment Playbook (CAP) tool continues to be the most visited area of the TfSE website. 13.5 Cllr Joy Dennis (JD) highlighted the significant value the CAP tool brings to TfSE and the wider region, noting that it has helped raise TfSE's national profile. JD emphasised the importance of continuing to develop tools of this nature, both to support officers and to strengthen the overall case for TfSE. 13.6 EB also confirmed that a programme of interim support is in place to ensure there is no gap in provision while the new workplan and funding allocations are finalised. 13.7 The recommendations were noted by the Partnership Board. ***RECOMMENDATION:*** The Members of the Partnership Board are recommended to note the progress being made with the delivery of the Centre of Excellence.	

14. Technical programme update

14.1 Rupert Clubb (RC) provided an update on progress with the technical programme.

EV Charging Infrastructure:

- Phase One of the on-street charging study is now underway.
- Commercial fleet charging maps have been completed for all local transport authorities (LTAs).
- Delivery of the EV Charging Infrastructure (EVCI) seminar series is ongoing.

Freight, Logistics and Gateways

RC reported strong progress across freight and logistics activities:

- A new freight e-training course is in development, with launch planned for April 2026.
- Recent Freight Forum discussions are helping shape upcoming practical guidance for LTAs and partners.
- The ALFFI tool is being adapted to identify opportunities for smaller HGV charging sites across the South East.

Rail

- RC confirmed that the Rail Strategy has now been approved and published.
- Work continues collaboratively with national and regional partners on the development of a Wider South East Rail Plan.

Decarbonisation

RC reported that updates to the Carbon Assessment Playbook (CAP) are currently in progress. LTAs continue to receive support through a programme of decarbonisation workshops and related activities.

14.2 Cllr Joy Dennis (JD) welcomed the progress being made on EV charging infrastructure and expressed interest in understanding the experiences and challenges faced by other authorities in rolling out EV infrastructure. Noted the value of sharing learning across the region to support consistent and effective delivery.

14.3 The recommendations were noted by the Partnership Board

RECOMMENDATIONS:

The Members of the Partnership Board are recommended to:

1) Comment on progress with the work to implement the Electric Vehicle Infrastructure Strategy;
2) Comment on the progress with the delivery of the Freight, Logistics and Gateways Strategy;
3) Comment on the progress with the work on rail;
4) Comment on the progress with the work on decarbonisation.

15. Business Advisory Group

15.1 SC drew attention to the comments submitted by Cllr Osborne on the Business Advisory Group report: “I welcome the report and am pleased to see the strong emphasis on the international transport considerations. This aligns well with the draft Growth Strategy for Kent and Medway in development. I understand that the Gatwick Rail Services study will commence soon now that TfSE, Gatwick Airport Ltd and Network Rail have agreed the study and funding agreement. This is an excellent step forwards and I am keen to see the outcome of the further study Network Rail will undertake.” 15.2 SC welcomed Vince Lucas (VL), who provided an update on the meeting of the Business Advisory Group (BAG) held on 5 March 2026. 15.3 VL reported that the BAG discussed the SIP refresh, devolution, the newly published Rail Strategy, and the TfSE 2026/27 workplan. A significant proportion of the discussion focused on Gatwick, reflecting its importance to businesses across the region. VL noted that the BAG’s report aligns closely with the priorities set out in the SIP. 15.4 VL also highlighted that the themes raised by the BAG last year informed the agenda of the 2025 Business Summit. Themes were explored at the March meeting and will be used to shape the agenda for the 2026 Business Summit. 15.5 VL noted that businesses are reporting increasing confidence, while continuing to highlight ongoing challenges relating to multimodal connectivity and regional growth. 15.6 RC confirmed that TfSE held a productive meeting with Network Rail the previous week to discuss issues relating to Gatwick. He noted that this reflects TfSE’s commitment to working with regional partners and builds directly on the themes raised through the BAG. 15.7 SC commended the clarity of the BAG report and thanked the team for their work. 15.8 Cllr Joy Dennis (JD) noted that some of the BAG’s comments on rural issues appeared to be made without lived experience of rural areas. Emphasised that residents are generally aware of the implications of living in rural locations and provided an example from West Sussex where a DRT service was withdrawn due to low demand and continued preference for private car use. 15.9 VL agreed, while acknowledging that reductions in services largely driven by funding pressures, have had real impacts on rural communities. Suggested that solutions to rural isolation will likely need to be varied, rather than a single universal approach, noting this is reflected in some of the data gathered to date. 15.10 The Partnership Board approved the publication of the Business Advisory Group’s 2025/26 report.	

RECOMMENDATION: The Members of the Partnership Board are recommended to: 1) Note the progress of the Business Advisory Group; and 2) Approve the publication of the Business Advisory Group's 2025/26 Report.	
16. Advisory Panel and Transport Forum Update	
16.1 Geoff French (GF) provided an update on the recent Transport Forum and Advisory Panel activity. 16.2 GF informed the Board that he will be standing down at the July meeting as Chair of both the Transport Forum and the Advisory Panel. 16.3 RC thanked GF for his significant support and contribution to TfSE since 2017, noting his longstanding role in shaping and championing the organisation's work. 16.4 The recommendation was noted by the Partnership Board. ***RECOMMENDATION:*** The members of the Partnership Board are recommended to note the recent work of the Transport Forum and Advisory Panel.	
17. Communications and Stakeholder Engagement Update	
17.1 James Boyes (JB) provided an update on recent communications and engagement activity. 17.2 JB informed Members that the regional travel survey factsheets have now been published, covering each sub-region and the South East as a whole. He invited Members to contact the team if they would like further detail or bespoke analysis. 17.3 JB reported that Jess Brown Fuller MP recently hosted a Westminster Halll debate on Transport in the South East, which covered several key issues, including: the A27, Isle of Wight ferries, and connectivity between Kent and Gatwick. 17.4 JB highlighted a recent meeting with the new Gatwick DiamondAPPG on Integrated Transport, noting that TfSE received positive engagement and support during the discussion. 17.5 JB provided an overview of recent social media performance statistics, outlining continued engagement across TfSE's digital channels. 17.6 The recommendation was agreed by the Partnership Board. ***RECOMMENDATION:*** The members of the Partnership Board are recommended to note the recent work of the Transport Forum and Advisory Panel.	

18. AOB	
18.1 RC thanked Members for their support over the past year and offered his best wishes to those standing for election.	
19. Date of Next Meeting	
19.1 The next meeting of the TfSE Partnership Board will be held in person in London at One Great George Street, on 13 July 14:00-17:00. 19.2 This will be the annual governance meeting (AGM), and in person Member attendance will be essential.	

Agenda item 5

Report to:	**Partnership Board –Transport for the South East**
Date of meeting:	**13 July 2026**
By:	**Chief Officer, Transport for the South East**
Title of report:	**Transport for the South East – Governance Arrangements**
Purpose of report:	**To agree the appointment of the Chair, Vice-Chair, and co-opted Board Members to the Transport for the South East Partnership Board.**

RECOMMENDATIONS:

The constituent members of the Partnership Board are recommended to:

1) Nominate and elect a Chair and Vice-Chair for the period of one year;

2) Whilst having regard to legislative or other changes agree to co-opt the following roles for a period of one year to the Partnership Board:

a. **Two people nominated collectively to represent business.**
b. **A person nominated by the National Parks and other protected landscape designations;**
c. **A person nominated by the district and borough authorities; and**
d. **A representative from National Highways, Network Rail and Transport for London.**

3) Allocate voting rights of one vote each for the two Business Advisory Group representatives, the nominated representatives of the district and borough authorities and the protected landscapes;

4) Appoint a Chair and agree membership of the Audit and Governance Committee for a period of one year; and

5) Note the request for members to return completed register of interest forms.

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1. Introduction

1.1 The Partnership Board agreed the constitution for Transport for the South East in its shadow form in June 2017 and a revised constitution in December 2019. The constitution set out proposals for the structure and composition of the Partnership Board. It was agreed that the arrangements should be reviewed on an annual basis.

2. Appointment of the Chair and Vice-Chair

2.1 The constituent authorities are recommended to nominate and elect a Chair and Vice Chair.

2.2 As agreed in the constitution for the Partnership Board, the Chair and Vice-Chair's term of office will be for a period of one year, when they are either reappointed or another member elected.

2.3 The Chair presides at Partnership Board meetings if they are present. In their absence, the Vice-Chair presides. If both are absent, the secretariat will start the meeting and the Partnership Board will appoint, from amongst its members, an Acting Chair for the meeting in question.

3. Co-opting additional Partnership Board members

3.1 The constitution for the Partnership Board allows for persons who are not members of the Constituent Authorities to be co-opted onto the Partnership Board and affords the Partnership Board the power to allow them voting rights.

3.2 In June 2017, it was agreed that a number of organisations should be co-opted to the Partnership Board. These arrangements have ensured that businesses, district and borough councils and protected landscapes are represented on the Board and are involved in the decision-making process.

3.3 In considering co-opted appointments the Board should have regard to changes proposed in relation to devolution arrangements, local government reorganisation proposals or other legislative or structural changes

3.4 The proposed arrangements for co-opted members reflect the structures for the Partnership Board as set out in the constitution and predominantly reflect a continuation of the arrangements in place since June 2017. It is proposed that the Partnership Board give consideration to co-opting the following organisations and representatives:

- Following the dissolution of the LEPs in 2024, the Partnership Board agreed to establish a Business Advisory Group, to capture the views of business and advise the Board. The group is co-chaired by Vince Lucas and Daniel Ruiz. It is proposed that two co-chairs are co-opted to the Partnership Board to continue to represent the business voice in our region. It is recommended that voting rights of one vote be allocated to each of the two co-chairs.

- National Parks and other protected landscape designations – the environmental impact of the Transport Strategy and proposed interventions will need to be considered by the Board. It is recommended that a representative be co-opted to the Partnership Board to represent the collective interests of the National Parks and other environmental and protected landscape designations. The position is currently filled by Mark Potter of the South Downs National Park.

  As agreed at the Partnership Board in July 2018, it is proposed that the representative for the National Parks and protected landscape designations should be allocated voting rights.

- District and Borough (non-unitary) Authorities – previously views of the district and borough authorities have been represented on the Partnership Board through two co-opted Board members, with one representing the east of the TfSE region, and one representing the west of the TfSE region. Currently the east position is filled by Councillor Matt Boughton, whilst the west position is vacant.

  As agreed at the Partnership Board in July 2018, it is proposed that the district and borough representatives should be allocated voting rights.

  Due to potential changes required as a result of local government reorganisation, it is not proposed to fill the vacant west position at this time, but instead to consider the wider representation on the Board more coherently through the proposed review of the TfSE constitution.

- The Chair of the Transport Forum – the Transport Forum has been in operation since September 2017, however the Chair has recently stepped down. As a result a review of the Transport Forum is proposed (agenda item number 11) to ensure that the group continues to provide value to both TfSE and its members. It is therefore not proposed to elect a representative to the Board at this time, but to consider representation once the future of the group has been determined.

3.5 In June 2019 the Partnership Board agreed to co-opt the following organisations, on a non-voting basis:

- Network Rail – TfSE has a key role in influencing strategic investment decisions in the rail network. Engagement with Network Rail at the Partnership Board will support this objective and it is proposed that the Dave Hooper, Managing Director, Southern Region, is co-opted to the Board.

- National Highways – this arrangement would be similar to the one proposed for Network Rail and would support the aim of TfSE to influence investment on the strategic road network through the Road Investment Strategy (RIS) programme. It is proposed that Richard Leonard, Network Development Director, is co-opted to the Board.

- Transport for London – the relationship between the TfSE area and London is an important aspect of our economy, particularly in relation to transporting people and goods. It is proposed that Shamal Ratnayaka Aviation Strategy Lead Transport for London, is co-opted to the Board.

4. Audit and Governance Committee

4.1 As previously agreed by the Board, TfSE has established an Audit and Governance Committee. This recognises the increasing responsibilities that TfSE holds for fiscal management of government grant funding.

4.2 As set out in the TfSE constitution, the Audit and Governance Committee will ensure an independent, high-level focus on audit, assurance and reporting issues underpinning financial management and governance arrangements for TfSE. It will provide independent review and assurance to Members on governance, risk management and control frameworks. It will oversee financial reporting and audit, to ensure efficient and effective assurance arrangements are in place and will assist the Partnership Board in providing leadership, direction and oversight of the overall risk appetite and risk management strategy.

4.3 The Committee met for the first time in April 2023. Due to changes in the composition of the Board, it is necessary to consider the membership of the Committee.

Following the recent local elections, the current remaining membership of the Committee is:

- Cllr Trevor Muten, Brighton & Hove City Council
- Cllr Matt Furniss, Surrey County Council
- Daniel Ruiz, Business Advisory Group Co-Chair
- Vince Lucas, Business Advisory Group Co-Chair

4.4 Members are asked to agree membership and elect a Chair of the Audit and Governance Committee. As agreed in the TfSE constitution, the Committee will comprise at least five members, including at least two representatives of the constituent authorities.

5. Register of Interests

5.1 TfSE maintains a Register of Member's interests in accordance with section 29 of the Localism Act 2011.

5.2 Members of TfSE must within 28 days of their appointment to office notify TfSE's secretariat in writing of the details of their disclosable pecuniary interests arising in respect of the TfSE area (including, where required, interests of their partner) and their personal interests.

5.3 Where a Member of TfSE is present at a meeting and has a disclosable pecuniary interest or, an interest that would be a personal interest under the provisions of the Code in any matter to be considered at the meeting, they must disclose the interest to the meeting.

5.4 Where a member of TfSE has a disclosable pecuniary interest or an interest that under the provisions of the Code would be a prejudicial interest in any matter being

considered at a meeting, they must not participate or vote on the matter and must withdraw from the room of the meeting while the matter is being considered.

5.5 A copy of the Register of Interest form will be circulated to all members following this meeting. The completed register of interests will be published on the TfSE website.

6. Conclusions and recommendations

6.1 The constituent authority members of the Partnership Board are recommended to agree the arrangements set out in this report for the election of the Chair and Vice-Chair of the Partnership Board, the appointment of the co-opted Board members and the allocation of voting rights. They are also asked to agree the membership of the Audit and Governance Committee.

RUPERT CLUBB
Chief Officer
Transport for the South East

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Agenda item 6

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

Date of meeting: **13 July 2026**

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

Title of report: **Proposed Transfer of Accountable Body Responsibilities from East Sussex County Council to the Sussex and Brighton Strategic Authority.**

Purpose of report: **This report seeks the Board's agreement in principle to the transfer of accountable body responsibilities for Transport for the South East (TfSE) from East Sussex County Council (ESCC) to the Sussex and Brighton Strategic Authority. The matter has been discussed previously by the Board and is now brought forward for formal consideration. The proposed change is a straightforward transfer of hosting arrangements, including the transfer of TfSE staff and associated accountable body functions, together with the necessary legal and administrative updates.**

RECOMMENDATIONS:

The Members of the Partnership Board are recommended to:

1) **Agree, in principle, that accountable body responsibilities for TfSE should transfer from ESCC to the Sussex and Brighton Strategic Authority, subject to their agreement, with effect from an agreed implementation date;**
2) **Note that any proposed transfer is expected to be a straightforward change in hosting arrangements under TUPE and the associated transfer of administrative, financial and contractual responsibilities;**
3) **Authorise the TfSE Chief Officer, in consultation with the Chair of the Partnership Board, to work with ESCC and the Sussex and Brighton Strategic Authority to complete the detailed implementation arrangements and to report back to the Board as necessary.**

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1. Background

1.1 TfSE was established in 2017 as a shadow sub-national transport body for the South East and has since developed into a mature regional partnership, bringing together local transport authorities and wider partners to provide a single strategic voice on the transport needs of the region. TfSEs purpose is to determine what investment is needed to transform the South East's transport system and support sustainable

economic growth, and it has developed both a long-term Transport Strategy and a Strategic Investment Plan to inform engagement with government and national delivery agencies

1.2 As TfSE is not yet constituted as a body capable of employing staff, entering into contracts and holding funds in its own right, these functions have been undertaken by East Sussex County Council (ESCC) as accountable body. In that role, ESCC has hosted staff, administered budgets, received and accounted for government funding and partner contributions, procured external support where required, and provided the governance, legal, democratic services, financial and administrative framework necessary for TfSE to operate. These arrangements have served the partnership well and have provided stability during a period of establishment, growth and increasing delivery maturity.

1.3 The governance landscape within the South East is, however, changing. This matter has previously been discussed by the Board as part of its wider consideration of TfSE's future governance and hosting arrangements. In particular, the establishment of the Sussex and Brighton Strategic Authority, and the transfer of local transport authority functions to that body, will mean that ESCC will cease to exercise those responsibilities in due course. It is therefore appropriate to consider whether TfSE's accountable body arrangements should now be aligned with that emerging governance framework. The Sussex and Brighton Strategic Authority has indicated its willingness in principle to assume the accountable body role, subject to the completion of the necessary implementation arrangements and formal approvals.

2. Rationale for Transfer

2.1 The case for transfer is primarily strategic. As devolution arrangements mature, strategic authorities are increasingly expected to provide leadership across transport, infrastructure, economic development and spatial planning. Aligning TfSE's accountable body arrangements with a strategic authority would reflect that wider policy direction and place the partnership on a footing that is more consistent with the institutional model now emerging across England. It would also help demonstrate that TfSE is evolving in step with the governance reforms affecting many of its constituent authorities and partners.

2.2 There is also a clear organisational case for change. ESCC has fulfilled the accountable body role effectively and with commitment over a sustained period. However, the role carries administrative, legal, financial and employer responsibilities which sit alongside ESCC's own corporate priorities and statutory functions. As local transport authority functions transfer to the Sussex and Brighton Strategic Authority, ESCC will no longer be the transport authority for the area. In those circumstances, the continued location of TfSE's accountable body responsibilities within ESCC would be increasingly difficult to justify on a long-term basis. The proposed transfer would therefore place those responsibilities with the authority whose remit will most directly align with transport leadership.

2.3 The proposed transfer should also be seen as part of ensuring that TfSE remains resilient and well-governed. A planned transition, undertaken at an agreed point and with appropriate due diligence, would provide the opportunity to refresh the supporting

agreements, clarify responsibilities, review internal controls and ensure that TfSE's governance framework remains fit for purpose for the next phase of its development.

3. Governance, Legal, Financial and Staffing Implications

3.1 If the Board agrees the recommendation in principle officers will need to complete the practical steps required to implement the transfer. This is not expected to be a complex exercise. In substance, it is a transfer of hosting arrangements from one public authority to another, with the principal staffing implication being the TUPE transfer of the TfSE team.

3.2 From a legal and governance perspective, the principal requirement will be to update the agreements, delegations and associated documentation that currently reflect ESCC's accountable body role so that they instead rest with the Sussex and Brighton Strategic Authority. This is a standard consequence of transferring hosting arrangements between public authorities and should be manageable through the usual legal and governance processes.

3.3 From a financial perspective, the work required is principally to transfer budget management, accounting and associated administrative arrangements to the new accountable body. This will require proper implementation, but it is not expected to give rise to unusual complexity.

3.4 The principal staffing implication is the transfer of TfSE staff currently employed by ESCC to the Sussex and Brighton Strategic Authority under the Transfer of Undertakings (Protection of Employment) Regulations. This is expected to be a straightforward TUPE process, supported by the usual legal, human resources and pension advice, and managed through normal consultation and implementation arrangements.

3.5 Governance arrangements will require consequential amendment to reflect the change in host authority, but the intention is not to alter TfSE's underlying partnership governance. The purpose of the transfer is to align the accountable body role with the authority that will in future hold the relevant transport responsibilities in Sussex and Brighton.

4. Risks and Mitigations

4.1 The principal risk is delay in completing the administrative and employment steps required to give effect to the transfer. That risk can be mitigated through clear joint planning between TfSE, ESCC and the Sussex and Brighton Strategic Authority. Given the nature of the change, no significant disruption is anticipated provided the transfer is implemented in the usual way.

5. Next Steps

5.1 Subject to the Board agreeing the recommendations set out in this report, and subject to the agreement from the Sussex and Brighton Strategic Authority, the Chief Officer should work with ESCC and the Sussex and Brighton Strategic Authority to

complete the TUPE process, update the relevant agreements and administrative arrangements, and confirm an implementation date for the transfer. A further report may be brought back to the Board if required to confirm completion and any consequential matters.

6. Conclusion

6.1 Subject to agreement from all parties the transfer of accountable body responsibilities from ESCC to the Sussex and Brighton Strategic Authority is a sensible and proportionate step. As ESCC will cease to be the local transport authority, and the Strategic Authority has indicated its willingness in principle to assume the role, the proposed change would provide an orderly realignment of TfSE's hosting arrangements. The Board is therefore recommended to endorse the transfer in principle and to authorise officers to put in place the necessary TUPE and administrative arrangements.

7. Recommendations

7.1 The Partnership Board are recommended to agree, in principle, that accountable body responsibilities for TfSE should transfer from ESCC to the Sussex and Brighton Strategic Authority, subject to their formal agreement, with effect from an agreed implementation date and to note that the proposed transfer is expected to be a straightforward change in hosting arrangements, including the transfer of TfSE staff from ESCC to the Sussex and Brighton Strategic Authority under TUPE and the associated transfer of administrative, financial and contractual responsibilities.

7.2 The Partnership Board are further recommended to note that the Sussex and Brighton Strategic Authority has confirmed its willingness in principle subject to their Board agreement, to assume the accountable body role and to authorise the TfSE Chief Offcer, in consultation with the Chair of the Partnership Board, to work with ESCC and the Sussex and Brighton Strategic Authority to complete the detailed implementation arrangements and to report back to the Board as necessary.

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Chief Officer
Transport for the South East

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Agenda item 7

Report to:	**Partnership Board –Transport for the South East**
Date of meeting:	**13 July 2026**
By:	**Chief Officer, Transport for the South East**
Title of report:	**TfSE Future Funding Model**
Purpose of report:	**To update Members of the Partnership Board on plans to develop a future core contribution and subscription model for Transport for the South East.**

RECOMMENDATIONS:

The Members of the Partnership Board are recommended to:

1) Note the work underway to develop a future core contribution and subscription model for TfSE; and

2) Note that a detailed proposal will be brought to the October 2026 Partnership Board for consideration and agreement.

1. Introduction

1.1 Following confirmation that Department for Transport funding for Sub-national Transport Bodies (STBs) will cease after March 2027, TfSE needs to develop options for its future operating model.

1.2 This includes consideration of a sustainable approach to:

- a **core contribution** from constituent authorities; and
- a **subscription-based model** for additional services provided by TfSE.

2. Background

2.1 TfSE has operated a mixed funding model since 2017. Initially funded by local transport authority contributions and then subsequently supported by the DfT through section 31 grant. However, the DfT has stated dedicated funding for STBs will end in March 2027 with limited transitional funding having been made available in 2026/27 to support the move towards new collaboration models.

2.2 Through engagement during Autumn 2025, all local authorities agreed with the principles for pan-regional collaboration and support a continued role for TfSE. They agreed TfSE should work to ensure the ambitions of the Transport Strategy are reflected in the policies and programmes of government and its arm's length bodies, as well as the work of other delivery partners.

2.3 The following areas were identified as the highest priorities:

- Regional Transport Strategy development
- Strategic rail planning and case-making
- Freight planning and research
- Network resilience research and knowledge sharing
- Identifying and evidencing investment priorities
- Providing data free of charge/reduced cost for local and regional use, including the Regional Evidence Base
- Advocacy – amplifying local voices to government
- Providing pan-regional governance
- Enhancing capability through the Centre of Excellence
- Potential to deploy/share staff resources

2.4 As TfSE has matured as an organisation, increasing services and support have become available to local authorities. Demand for these services has increased over time, reflecting requirements on authorities to produce and implement Local Transport Plans, the need for robust transport evidence to support funding bids and business cases and the benefits of a coordinated regional approach to transport analysis and insight. Alongside a core contribution, some of these services could be included within a subscription model, which could include enhanced access to:

- analytical frameworks
- data and analysis/insights
- training
- expert/technical advice
- project/programme management
- procurement framework access
- collective buying (e.g. data, EVCI)

3. Development of TfSE future funding model

3.1 TfSE has commissioned work to develop an evidence-led proposal for a future contribution and subscription model. Previous engagement with constituent authorities (including work undertaken in autumn 2025) has provided an initial understanding of future needs and expectations. This is being used alongside internal evidence to inform development of a future offer.

3.2 The development work will:

- review existing evidence on demand and service usage;
- consider future demand, including under a subscription approach;
- review comparator approaches, including Transport for the North's "Offer";

- develop a service offer Reviecomprising:
    - a core (base) offer funded through contributions;
    - enhanced subscription services; and
    - bespoke paid-for services;
- consider the role of the Centre of Excellence as the primary access point for services; and
- identify high-level resource, cost and delivery implications.

3.3 In developing the proposal, a number of issues will be considered, including affordability and proportionality across constituent authorities, legal and financial parameters for charging for services, risks associated with perceived double charging; and wider changes in governance, including devolution and local government reform.

3.4 Engagement with TfSE's constituent authorities will be ongoing throughout this work, through the Partnership Board, Audit and Governance Committee, and the Senior and Technical Officer Groups.

4. Next steps

4.1 The output of this work will be a proposed future TfSE offer and funding model, including:

- a draft service catalogue;
- indicative contribution and income scenarios;
- a preferred operating model; and
- a summary of key risks and issues.

4.2 A further report will be brought to the October 2026 Partnership Board, at which members will be asked to consider and agree the proposed approach, including the principles for a future core contribution, and a commitment to a core contribution for 2027/28.

5. Conclusions and recommendations

5.1 The Partnership Board is recommended to note the work underway to develop a future TfSE contribution and subscription model, and that a detailed proposal will be presented for consideration at the October 2026 meeting.

RUPERT CLUBB
Chief Officer
Transport for the South East

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Agenda item 8

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

Date of meeting: **13 July 2026**

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

Title of report: **Annual report 2025/26**

Purpose of report: **To agree to publish the Annual Report 2025/26 on the Transport for the South East website.**

RECOMMENDATION:

The Members of the Partnership Board are recommended to sign off the Annual Report 2025/26 and agree to publish it on the Transport for the South East website.

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1. Introduction

1.1 In line with previous years and in keeping with good practice, it is intended that Transport for the South East (TfSE) will publish a retrospective annual report at the start of the new financial year.

1.2 The Partnership Board must agree this annual report, before it can be published on our website.

2. Annual report 2025/26

2.1 The Annual Report provides clarity around TfSE's structure, role, vision and purpose alongside a summary of achievements and information on governance structures and finances.

2.2 The Annual Report for 2025/26 can be reviewed in Appendix 1. The Partnership Board are asked to review the draft and note if there should be anything else included.

2.3 The Annual Report follows broadly the same format as previous years. We have summarised our activity throughout the year and added new feature pages highlighting our work on key projects including the Transport Strategy, Strategic Investment Plan and Centre of Excellence, alongside work that supports delivery.

2.4 We have reported the level of transport funding the South East received for local transport in 2025/26 which our Audit and Governance Committee requested as an on-going metric. However, this only provides a partial picture of transport funding, as it excludes government funding for strategic roads and rail, on-going funding for local

road maintenance, and other council grants. The figures shown relate solely to government funding for local transport improvements in 2025/26.

2.5 Our year-end financial figures for FY25/26 are set out in the ‘Finances’ section.

3. Conclusions and recommendations

3.1 The Partnership Board is recommended to sign off the Annual Report 2025/26 and agree to publish it on the TfSE website.

RUPERT CLUBB
Chief Officer
Transport for the South East

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TRANSPORT FOR THE South East

Annual Report 25/26



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Chair's Foreword

Councillor Keith Glazier OBE

This has been a year of significant delivery for Transport for the South East (TfSE). Against a backdrop of continued financial pressure on local authorities and changes in how transport is governed and funded, TfSE has remained focused on its core purpose: providing pan-regional leadership, a shared evidence base, and a clear, unified voice for the South East in national decision-making.

This is an important moment for transport. With Government placing renewed emphasis on economic growth, infrastructure delivery and integrated networks, the role of the South East in shaping and delivering national ambition has never been more critical. Our region is home to major international gateways, nationally important industries and millions of people who rely on effective transport every day. Ensuring that national policy recognises and invests in that role remains central to our work.

Throughout the year, the value of collaboration across boundaries has become even clearer. Local government reorganisation and the emergence of mayoral combined authorities are reshaping transport leadership across the region. TfSE has offered practical support while retaining a coherent regional perspective to inform decision-making.

A central focus has been turning long-term ambition into deliverable plans. In the past year we have delivered two significant projects which are fundamental to TfSE and transport decision-making in the South East over the next two decades.

We secured board approval on the refreshed Transport Strategy as well as an updated Strategic Investment Plan, which sets out a prioritised programme of interventions that supports the missions and objectives set out in our strategy. We have also developed a new Rail Strategy to help shape engagement with Government and industry partners, ensuring the South East is well positioned as rail governance evolves.

We also strengthened our role as a convener of partners beyond the public sector. Our inaugural Business Advisory Group Summit brought together leaders from across the region to discuss shared challenges, including rural transport, international connectivity and energy availability.

This dialogue reinforced the vital role transport plays in enabling economic performance, opportunity and thriving communities.

The year has also required a clear focus on TfSE's own future. The planned end of dedicated government funding for sub-national transport bodies from 2027 presents challenges, but also an opportunity to become more focused, agile and resilient. Working closely with our Board and partners, we have begun shaping a future operating model that retains TfSE's strengths while responding to a changing environment. This will remain a priority for 2026/27.

This is my final foreword as Chair of Transport for the South East. Since 2017, TfSE has grown into a respected and influential strategic body, recognised for bringing clarity, credibility and consistency to the regional transport conversation. I am very proud to have played a part in this progress, and I am confident that it will continue under my successor.

I would like to thank our Board members, partners and staff for their dedication and professionalism during my time as Chair. In particular, I recognise the contributions of two colleagues who will be standing down: Geoff French for his outstanding leadership of the Transport Forum and Councillor Joy Dennis for her diligent work as Chair of the Audit and Governance Committee.

I step down confident that TfSE will continue to champion the South East and support the delivery of a transport system that drives economic growth, supports decarbonisation and improves journeys for the people and businesses we serve.



Cllr Keith Glazier OBE

Chair Transport for the South East

About Us

As a Sub-national Transport Body, Transport for the South East (TfSE) brings together representatives from local transport authorities (LTA), national agencies, transport operators and business and other key stakeholders to shape the long term future of transport across the South East.

Our mission is to support economic growth and the highest quality of life in the region by promoting a transport system that is safe, sustainable and well connected. Working collaboratively, we help shape policy and priorities that can influence government, transport providers and investors, ensuring decisions reflect the needs of communities and businesses.

We play a key role in aligning local and national transport priorities, creating a clear 'golden thread' between local transport plans and national strategies. Our collaborative governance model enables constituent authorities and partners to shape policy, investment, and delivery through our partnership board and thematic working groups.

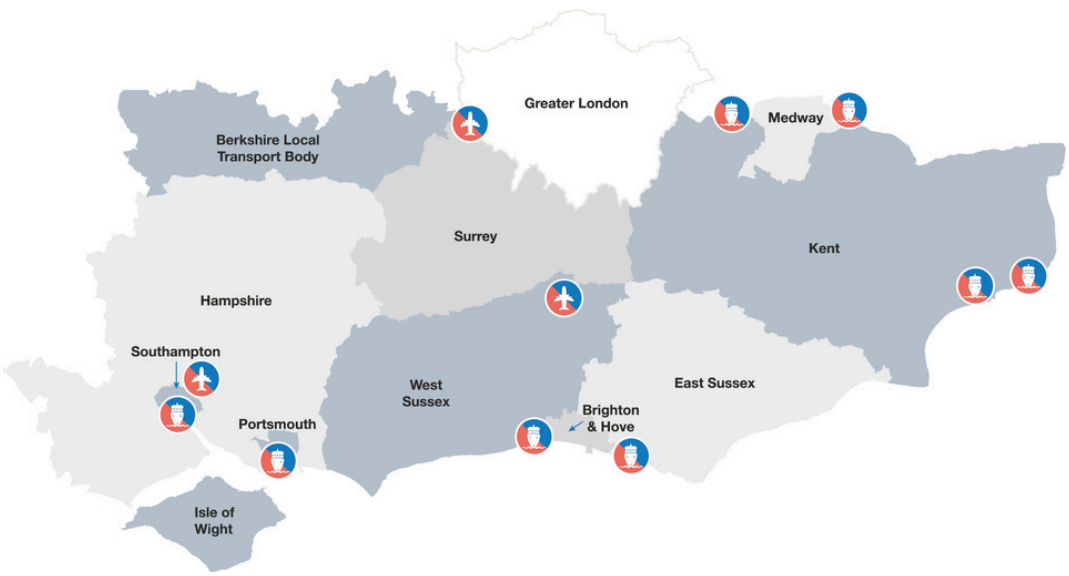
The South East plays a vital role in national and international connectivity. It is served by the UK's largest airports, a strategic motorway network including the M25, extensive rail links connecting London with the rest of the UK and Europe, and some of the country's busiest ports. With a population of more than 7.8 million and around 350,000 businesses, the region supports a dynamic economy and acts as a major gateway for people and goods.

Given the scale, complexity and interconnected nature of the South East's transport and economy, TfSE plays an important role in bringing partners together to identify shared priorities and secure investment in the region's future.

We work closely with LTAs to support the development and delivery of effective transport solutions. Through strong partnership working and a joined-up regional approach, we help maximise value for government and the taxpayer, while delivering lasting benefits for those who live, work and do business in the South East.

Our Constituent Authorities

Our constituent authorities represent the region's diverse geography and transport needs. As devolution and local government reorganisation evolves, our constituent authorities may change, but we will continue to bring together LTAs across the South East.



Our Current Position

TfSE has operated a mixed funding model since 2017, funded by contributions from our LTAs and the Department for Transport (DfT). However, the DfT's decision to end dedicated funding for STBs in March 2027 has necessitated exploring further funding options with our LTA members.

All our authorities agree with the principles for on-going pan-regional collaboration and support a continued role for TfSE, which will help to provide support and consistency through a period of significant change and evolution for local government.

We remain committed to our visions and missions and will work to ensure the ambitions of the Transport Strategy are reflected in the policies and programmes of government and the work of our delivery partners.

Our Year in Review

April-June 2025

- Received recognition in the **CIHT Awards** (Collaboration category) for our role in developing and launching the Centre of Excellence (CoE).
- Contributed to a series of AI workshops alongside experts from government, academia and industry, feeding into a TRL report on overcoming barriers to **AI in transport**.
- Hosted in-person **workshops** with LTA officers on Resilience and Inclusion and Integration, two of the missions in our Transport Strategy that highlighted key challenges and areas of focus.
- Published an independent report on the **Solent ferry services**, commissioned by our Business Advisory Group, including an economic assessment and future service options.
- Delivered our **Electric Vehicle (EV) Programme Discovery Project**, assessing EV adoption and charging infrastructure with LTAs. Identified key challenges including funding, procurement, and grid constraints that informed recommendations on our future role in supporting delivery.
- Presented early findings from the **Regional Travel Survey** at the Modelling World Conference in Manchester, highlighting changes in travel behaviour since the pandemic.
- Completed our initial light commercial vehicle **(LCV) charging project**, developing a regional evidence base on fleet charging demand. Included analysis of fleet patterns, energy use and stakeholder engagement alongside practical guidance for LTAs planning and delivering infrastructure.

July-September 2025

- Hosted our first **Business Advisory Group summit** in Guildford, bringing together 50 business representatives to discuss the impact of issues such as rural isolation and international connectivity in the region.
- Released a CoE report on the **impact of devolution on bus services**, alongside a webinar which also explored cross-subsidy and cross-boundary infrastructure issues.

- Commenced work on a refreshed **Strategic Investment Plan**, working with member authorities to refine schemes and identify new priorities.

- Delivered an update to our **EVCI Fleet Forecasts**, refreshing the regional evidence base on EV uptake and charging demand. Incorporated latest vehicle registration data, updated assumptions and re-ran the STB EVCI model, strengthening support for LTAs' infrastructure planning.

- Presented an **active travel modelling webinar** showcasing best practice, and a supporting blog which became the most visited page on the CoE site.

October - December 2025

- Published our **Regional Travel Survey** based on 6,800 public responses which tracked 18,000 journeys in the region.

- Updated our **LCV charging work** by expanding fleet mapping to cover all the LTAs in our region. Strengthened the evidence base and supported LTAs to identify demand hotspots, plan infrastructure and develop investable charging proposals.

- Launched the second **State of the Region report**, identifying key economic, environmental and social transport trends across the South East.

- Secured Partnership Board approval for the updated **Transport Strategy** completing a three-year programme of work.

- Published the **Intermodal Freight Study**, highlighting opportunities to move more freight by rail through expanded use of intermodal rail freight and rail interchanges.

- Supported LTAs with training and guidance on the **Carbon Assessment Playbook** through a series of training workshops which focused on policy, building an evidence base and an overview of the Quantifiable Carbon Guidance.

January - March 2026

- Launched our first **Rail Strategy**, setting out a long-term approach to rail investment and improvement across the region.

- Gained Partnership Board approval for the updated **Strategic Investment Plan**, outlining a prioritised programme of transport schemes and investment across the TfSE region.
- Delivered a scoping study and LTA toolkit on **on-street EV charging solutions**, focused on residents without off-street parking. Explored accessibility, kerbside management and delivery challenges, alongside emerging solutions.
- Marked **International Women's Day** by sharing case studies of women working in transport across the region.
- Hosted our **Transport Forum** in London, including workshops on future transport challenges led by industry leaders, and facilitated by university representatives.
- Began development of a **South East Freight Awareness Programme**, focusing on regional needs and practical support for LTAs.
- Supported delivery of a series of CoE **EV webinars** covering key topics including charging costs, commercial vehicle charging, accessibility, and on-street delivery.



Local Transport Investment in the South East 25/26

This table summarises the transport funding DfT awarded to LTAs in our region in financial year (FY) 2025/26. TfSE's Audit and Governance Committee asked us to record the data as an on-going metric and include it in each Annual Report.

Fund	FY 25/26	Change on FY 24/25 £
Bus Service Improvement Plans	£ 98, 209, 600	↑ £ 83, 857, 579
Local Electric Vehicle Infrastructure (Capital)	£ 2, 942, 980	↓ £ 20, 483, 020
Local Electric Vehicle Infrastructure (Capability)	£ 0	↓ £ 2, 813, 830
Zero Emission Bus Regional Area Scheme 2*	£ 0	N/A
Active Travel (Capital)**	£ 0	↓ £ 8, 920, 733
Active Travel (Capability)**	£ 0	↓ £ 1, 962, 171
Consolidated Active Travel Fund**	£ 23, 876, 136	↑ £ 23, 876, 136
MRN/LLM (9,143,615 24/25)	£ 12, 250, 813	↑ £ 3, 107, 198

** Zero Emission Bus Regional Area Scheme 2 grant was announced in FY 23/24, but money awarded to be spent in FY23/24 and FY24/25.*

***The Consolidated Active Travel Fund (CATF) supports LTAs with the development and construction of walking, wheeling and cycling facilities in England. The grant is provided at 76% capital and 24% revenue with variations between LTAs. The CATF supersedes the Active Travel Fund and Capability Fund in FY25/26.*

This is based on our analysis of figures publicly available on GOV.UK and returns submitted quarterly to the DfT by LTAs updating on Major Road Network/ Large Local Majors (MRN/LLM) scheme progress and forecast investment. The figures have not been independently verified by a third party and should not be used to make investment decisions.

The table includes government funding for local transport improvements in 25/26. It does not include on-going funding for local road maintenance or other council grants.

It excludes funding for on-going for enhancements of the rail and strategic roads network. These figures will be published by the Office for Road and Rail, Network Rail and National Highways in their annual reports.

How TfSE Supported Delivery in 2025/26

Driving Progress Through Regional Support

Our refreshed SIP underpinned much of our work in 2025/26, helping to turn strategic priorities into tangible progress across the region. Working alongside LTAs, the DfT, National Highways, Network Rail and wider partners, we helped unlock the next phase of scheme development.

Supporting Scheme Development Across the Region

Through our scheme development support programme, we continue to assist LTAs take forward schemes to feasibility study stage or commence Strategic Outline Business Cases (SOBC). These projects span modes and geographies including bus priority schemes and station hubs to active travel corridors and major road enhancements.

	Awarded
23/24	
West Quay Road Realignment, Southampton *Working with Southampton City Council* Completed in 25/26	**£100,000**
24/25	
A259 Chichester to Bognor Regis Enhancement SOBC *Working with West Sussex County Council* Completed in 25/26	**£100,000**



Image Source: WSCC

A27/A23 Patcham & Falmer Mobility Hub Feasibility Study — **£50,000**
Working with Brighton & Hove City Council
Completed in 25/26

A2 Botley Service Enhancements Feasibility Study — **£50,000**
Working with Southampton City Council
Completed in 25/26

25/26

Kent – Gatwick Service Enhancement — **£30,267**
Working with Kent County Council
Underway

South East Hampshire Rapid Transit Feasibility Study — **£50,000**
Working with Portsmouth City Council with support from Hampshire County Council and Isle of Wight Council
Underway

Southampton Mass Transit Feasibility Study — **£100,000**
Working with Portsmouth City Council with support from Hampshire County Council and Isle of Wight Council
Completed in 25/26

Without our support, these schemes were unlikely to progress, due to a lack of early-stage development resources. This programme has helped build a stronger pipeline of projects that can be taken forward into full business case development when funding available.

Providing Regional Insight and Tools

During the year, we enhanced our Analytical Framework to support LTAs in developing stronger and more credible business cases. The framework brings together a coordinated programme of projects aimed at improving modelling, forecasting and evaluation capability across the region.

- Published the **Regional Travel Survey** alongside a supporting webinar and factsheets for LTAs. The survey analysed data from over 6000 public responses to improve understanding of regional travel patterns, behaviour and motivations. Since publication, nine LTAs have requested access to the data for their own analytical work.

- Developed the **South East Highways Assignment Model (SEHAM)** / **Travel Market Synthesiser**. Following completion of Phase 1, work commenced on Phase 2, the **South East Transport Model System** (SETMS). Comprising of SEHAM, the Travel Market Synthesiser, a Variable Demand Model, and a Public Transport Model, SETMS will provide a robust suite of modelling tools when completed in the second half of 2027.

- Completed a proof-of-concept study on **rail modelling**, shared with partners and STBs which also informed the development of SETMS.

- Worked with **Podaris**, an online platform for public transport intervention planning and analysis, to develop one of its first regional-level platforms, enabling licence-free access for partners, taken up by one of our LTAs.

- Procured **BT Mobile Network Data**, with full access requested by four LTAs and received further enquiries for future projects. This delivers significant cost savings for partners, as individual LTA procurement would typically cost between £40k and £80k, depending on population size.

- Provided data from the **GB Freight Model** to LTAs and progressed further development to generate freight movement insights supporting strategic planning and analytical work.

- Finalised infrastructure for the **regional data hub**, supporting more consistent and efficient large-scale data processing and analysis for LTAs.

- Hosted two South East **Modelling and Appraisal Forums** focused on sharing modelling and analytical developments across the region.



- Contributed to the development of DfT's **National Activity Based Model and Transport East's BERTIE** (BEhaviouR & Transport: Impact & Equity) projects through membership of stakeholder boards. These models support transport planning based on need and the simulation of journeys respectively.

- Collaborated with LTAs to deliver **analytical and modelling support** to LTAs, ranging from analytical support for DfT's MRN scheme applications to modelling and traffic survey specifications. This new area of support has saved LTAs up to £200k, estimated on equivalent work commissioned at market rates.

- Provided on-going training, guidance and technical assistance through the **Centre of Excellence**, including webinars on AI and modelling, helping partners maximise their analytical capability.

Monitoring Progress and Making the Case for Investment

Alongside the refresh of the SIP, we continued to maintain our Delivery Action Plan (DAP) which helps track how interventions are progressing, identify delays and provide targeted support to partners where it's needed most.

Following completion of the SIP work, we have started to refresh both the DAP and the Interactive Story Map. This tool allows users to easily visualise schemes across the region and understand their current status and progress.

This year we have helped turn ambition into progress by bringing partners together, supporting LTAs to develop and move schemes forward, maintaining momentum, and making sure the South East is ready with a strong pipeline of projects aligned to both government priorities and our own objectives.

Delivering Impact:

Transport Strategy

Our Transport Strategy sets out a shared long-term vision for transport across the South East and the role it plays in supporting economic growth, improving quality of life and protecting the environment. It represents a major milestone, providing a clear framework for how the transport system needs to respond to the region's long-term challenges and opportunities.

Looking ahead to 2050, it focuses on creating a more reliable, integrated and lower-carbon transport network that supports sustainable growth while improving access to jobs, education and services.

It also reflects the South East's role as a key national and international gateway, recognising that better connectivity, both within the region and beyond, is essential to maintaining competitiveness while reducing environmental impacts.

At the heart of the strategy are our five missions: strategic connectivity; resilience; inclusion and integration; decarbonisation, and sustainable growth. Together, these provide a clear structure for setting priorities and guiding future investment, helping ensure that improvements deliver real benefits for people, businesses and communities in our region.

Developed in close partnership with LTAs, transport operators, government and wider stakeholders, and informed by extensive evidence and public consultation, the strategy reflects shared priorities across the South East. It is supported by our Strategic Investment Plan, which translates this vision into a coordinated programme of investment and improvements to 2050 (see page 16).

Together, they provide a clear route from strategy to delivery, helping us and our partners make the case for investment and plan for a more connected, sustainable and prosperous region.

Delivering Impact:

Strategic Investment Plan Refresh

To ensure alignment with the updated Transport Strategy and to respond to evolving regional needs and national policy direction, Transport for the South East completed a refresh of its Strategic Investment Plan (SIP).

The SIP sets out a clear, prioritised programme of transport investment required across the TfSE region and beyond, to deliver the strategy's outcomes. Maintaining a current and strategically aligned SIP is essential to supporting both existing and emerging authorities in securing investment.

This update builds on the foundations of the original SIP, published in 2023. Rather than repeating detailed area studies, we drew on a well-established evidence base and applied our enhanced analytical capability to strengthen our existing work. The strategy also provides a renewed focus for this evidence, reflecting the region's long-term vision.

As part of the update, we reviewed the existing list of transport schemes, projects and interventions. This included adding new schemes, particularly those supporting the strategy's resilience and inclusion and integration missions and removing those that have either been delivered or are no longer supported. This ensures the SIP remains focused and aligned with the updated strategy.

Extensive and targeted stakeholder engagement underpinned the process. We worked closely with LTA officers and members through established working groups and the Member Task and Finish Group, alongside key delivery partners and the DfT. This was complemented by technical 'deep dive' sessions with LTA officers to explore priorities and challenges in greater detail.

Following presentation of the draft SIP to the TfSE Board in January, we undertook further targeted engagement, including a series of 'fireside chats,' and opportunities for written feedback. The response was positive, with strong support for the direction and content of the refreshed SIP.

This work reflects effective partnership across local authorities, national agencies, and stakeholders, all committed to delivering a transport system that supports regional economic growth.

Looking ahead, the SIP provides a strong platform for the next phase of delivery. We will focus on supporting partners to develop robust business cases, secure funding, and respond to emerging opportunities as transport policy, governance, and funding landscapes continue to evolve.

Delivering Impact:

Business Advisory Group Summit

The TfSE Business Advisory Group plays an important role in engaging stakeholders across the region. It ensures that businesses perspectives are clearly understood and reflected in our work and helps us to understand the transport issues that most affect economic growth.

Since it was established, the Business Advisory Group members have identified three priority areas where transport improvements are critical to unlocking growth: access to international connectivity; energy availability; and rural isolation.

The group met in person for the first time at a summit in Guildford, providing an opportunity to explore these issues in greater depth. Fifty representatives attended, reflecting a broad range of businesses and organisations from across the South East, each bringing a valuable insight into the challenges facing their sectors and communities.

The summit was structured around facilitated workshops, with participants working in groups to explore each of the three priority areas. Initial discussions focused on how these issues are affecting organisations and constraining growth. This was followed by sessions exploring what is required for transport interventions to make a meaningful difference.

The outcomes of these discussions were brought together in a report produced by TfSE on behalf of the Business Advisory Group. It summarises the key insights and recommendations from business representatives and highlights where targeted action could deliver the greatest impact.

These insights will inform our ongoing work to ensure that investment priorities reflect the needs of the region's business community.



Delivering Impact:

Regional Travel Survey and State of the Region Report

We strengthened the evidence base available to LTAs through the publication of the Regional Travel Survey, and second State of the Region report. Together, these support more informed transport planning across the South East.

The Regional Travel Survey was designed to build a clearer picture of how people travel across the region. It captures information on trip frequency by mode and purpose, as well as the origins and destinations of journeys. It also provides insight into how commuting and leisure travel have changed since the pandemic, and how travel patterns vary across key groups, including age, income, levels of car ownership.

More than 6,800 participants took part in the survey, recording 18,000 individual journeys during a two-week period in October and November 2024, with a further sample collected in March 2025.

Participants recorded how often, why, and how far they travelled, and which modes they used, alongside demographic information. The survey aligns closely with the National Travel Survey, enabling comparisons between regional and national trends.

The depth and timeliness of this evidence provide a stronger basis for both TfSE and local authorities to plan and prioritise investment. Findings have already informed TfSE work programmes, including the updated State of the Region Report.

First published in 2023, the State of the Region Report provides an overview of social, economic and transport conditions across the South East. The new update tracks how these conditions are changing over time.
It shows how the region is performing against the ambitions set out in the Transport Strategy and SIP, and whether progress is sufficient to deliver long term outcomes.

Presented through an interactive ArcGIS platform, the data allows LTAs and transport planners to explore trends at both regional and local levels, supporting more evidence-based decision making.

These updates provide a solid picture of what's happening on the ground giving LTAs a shared evidence base they can use with confidence across the region. This helps target effort and funding where it will make the most difference, supporting business cases and strengthening the case for investment.

Delivering Impact:

Rail Strategy

The forthcoming creation of Great British Railways (GBR) comes at an important moment for the South East's rail network. Rail plays a vital role in connecting people to jobs, education, international gateways and major economic centres.

Our rail strategy has been created to advise the Secretary of State, Network Rail and GBR, on rail investment priorities across the TfSE area over the next 25 years. It will also help new mayoral combined authorities, unitary authorities and local authorities understand the rail challenges and opportunities in their areas, and how local plans can affect the wider rail network.

Developed with LTAs, Network Rail, DfT, Gatwick and Heathrow airports, port authorities, STB's, train operators, and freight partners, the strategy draws on our regional evidence and analysis to identify priorities across the network. It supports our Transport Strategy and Strategic Investment Plan, helping ensure rail priorities align with wider transport and economic objectives.

The strategy set out an evidence-led framework for improving passenger and freight connectivity across the South East, focusing on radial and orbital rail corridors. It identifies the interventions and policy changes needed to support growth, improve reliability and make the network more resilient.

The strategy also recognises rail's role in decarbonising freight and supporting sustainable growth, while addressing some of the issues that can discourage passengers from travelling by rail. These include a lack of step-free access at some stations, non-electrified sections of the network, poor line speeds and ageing rolling stock.

By bringing partners together around shared priorities, the strategy strengthens our role as the South East's strategic transport body and provides Government with a clearer regional view of future rail investment needs.



Delivering Impact:

Centre of Excellence

TfSE's Centre of Excellence (CoE), created in 2024, brings together evidence, insight and practical expertise to support better transport planning and delivery across the region. For LTAs, it provides a trusted, shared resource, helping officers and decision makers navigate complex challenges with confidence.

By offering access to robust data, clear guidance and a consistent planning approach, the CoE helps ensure that local plans and schemes are well founded, aligned with regional priorities, and able to attract and make the most of investment.

Working closely with local authorities, delivery partners and national stakeholders, the CoE digital platform plays a key role in building capability and supporting informed decision making.

It offers tools, advice and opportunities for collaboration, while creating space for partners to share experience and learn from one another, strengthening the ability of partners across the region to plan and deliver transport improvements that benefit residents, businesses and the wider economy.

2025/26 In Figures

During 2025/26, the CoE built upon the solid foundations of its first year with a programme of support, resources and advice for LTA officers in the region.

- **55 webinars** and events, **1601 total attendees**
- **228** pieces of **new content** available, 457 pieces of content overall
- **122 new officer sign-ups** across the region, **406 in total.**
- **3,077 website visits**, with **1,271 unique visitors**
- **£2,310,432** in equivalent **savings** for all 16 LTAs (total cost to TfSE was £144,402)

These metrics demonstrate both the scale of engagement and the efficiency of the programme, with high levels of participation achieved alongside significant cost savings.

Moreover, monitoring insights such as webinar feedback and the capability survey, sent to all registered users, continue to inform the evolution of the programme, ensuring that future delivery remains targeted, relevant and responsive to LTA needs.

2025/26 Priority Programme

A tailored programme covering nine priority areas was identified following feedback from our capability survey. This included the following areas:

Modelling and Forecasting

Helped officers become more confident users of transport models and forecasting outputs. Focused on understanding how models worked, how to interpret results and how to challenge assumptions. Also highlighted TfSE tools that strengthened the evidence behind decisions.

Scheme Development

Supported officers to prioritise schemes, develop realistic costs and move projects forward with confidence. Covered the practical steps needed to navigate changing governance and funding processes from early idea to delivery.

AI in transport and planning

Introduced how AI is used in transport analysis and planning. Through expert-led webinars, it set-out practical applications and helped officers understand how AI can support more informed, data-driven decision-making.

Awareness of emerging technologies

Brought together case studies, webinars and insight from the UK & beyond. Showed how new technologies were being applied in practice, helping officers understand what was relevant and what could work locally.

Decarbonisation

Provided clear, practical tools, and learning to help officers assess carbon and build climate considerations into everyday decisions. Focused on making decarbonisation achievable and embedded in standard processes.

Electric Vehicles

Supported planning for EV infrastructure with up-to-date guidance, tools and insight, helping officers respond to fast-moving technology, policy and demand.

Network Review and Design

Gave officers practical guidance on managing and shaping transport networks. Covered applying design standards, balancing competing priorities and working within real world constraints.

Impacts of Devolution on Buses

Helped officers respond to a changing bus landscape amidst an evolving local government environment. Offered practical insight on delivering improvements amid evolving governance, limited resources and uncertainty around franchising and funding.

CoE Impact

In 2025/26 the CoE continued to deliver against its core principles: strengthening capability across our LTAs, maximising value for money, fostering collaboration, and providing practical, high-quality support aligned with local needs.

The programme has enabled authorities to access specialist expertise, training, resources and tools. By coordinating provision at a regional level, the CoE has ensured consistence in approach, reduced duplication, and accelerated adoption of best practice across the South East.

A key focus of our CoE is co-design, and ensuring we deliver targeted support identified through the annual capability survey, while responding flexibly to emerging priorities and opportunities. This has been complemented by additional contributions from internal TfSE expertise and external partners, further enhancing the overall offer at no additional cost to LTAs.

Officer support for the CoE

"I will be advising fellow colleagues to watch the recording from the CoE website."

"It was a really interesting session."

"One of the best presentations I've heard in a long while from a true pioneer being absolutely frank about the challenges involved in running a hydrogen bus fleet, but nonetheless positive about their experience. Strong pointers towards the regulatory and logistical issues involved that need resolving."

Programme Delivery and Value for Money

The TfSE Centre of Excellence programme delivered significant financial efficiencies in 2025/26. The total investment by TfSE enabled a substantially greater equivalent value were services procured individually by all 16 LTAs.

Programme Area	TfSE Investment	Equivalent LTA Cost (if procured individually)	Number of attendees
Active Travel	£3,000	£48,000	56
Scheme Development	£15,000	£240,000	168
Electric Vehicles	£15,312	£244,992	165
Improving Sustainability & Lowering Carbon	£12,200	£195,200	124
Network Review, Design & Planning	£16,000	£256,000	79
Awareness of Emerging Technologies	£15,000	£240,000	335
Modelling & Forecasting	£10,295	£164,720	314
Bus Support	£46,795	£748,720	N/A
AI in Transport Planning	£10,800	£172,800	131
Total	**£144,402**	**£2,310,432**	

Officer support for the CoE

"It was clear, concise and very informative."

"Very good & very informative, very good insight to the developing EV market"

"Excellent webinar with the right level of content coupled with discussion based on real-life experience. Both presenters very clear in explanation."

"I found this a very timely and useful refresher for what I already knew, and a good opportunity to see recent case studies."

Wider Added Value and Additional Delivery

In addition to the structured support packages identified through the capability survey, a significant programme of supplementary activity was delivered throughout the year. This activity was provided free of charge, through contributions from:

- TfSE officers
- Universities and academic partners
- National Agencies
- Central Government
- Local authorities
- Transport operators

These sessions expanded the breadth of the programme and ensured authorities had access to emerging knowledge, innovation, and best practice beyond the core provision. These included:

Behavioural Science for Policy and Communications
Delivered by Cabinet Office
Introduction to applying behavioural insights in transport policy and engagement

Hydrogen Buses: West Sussex Case Study
Delivered by Go-Ahead Group
Practical lessons from implementation of hydrogen bus technology

Cadence Tool Training and Demonstration
Delivered by Cadence
Overview and application of the Cadence tool for transport planning

SUMINI Prioritisation Tool Webinar
Delivered by University of Surrey
Applying data-led approaches to scheme prioritisation

Active Travel Capability Showcase
Delivered by West Sussex County Council
How to improve Active Travel England capability ratings

Professional Development: CTPP Accreditation
Delivered by West Sussex County Council and Brighton and Hove City Council
Guidance on achieving Chartered Transport Planning Professional status.

Carbon Assessment Playbook Application
Delivered by Brighton and Hove City Council
Officer-led session on integrating carbon assessments into Local Transport Plans utilising TfSE's Carbon Assessment Playbook Tool

Strengthening Our Relationships

Bus Forum

The Regional Bus Forum continued to bring LTA officers together in 2025/26, helping them share best practice, discuss shared challenges, and collaborate on priorities for improving bus services.

In 2025/26, sessions covered topics on Podaris, Bus Open Data Services, the social value of buses, working with the NHS, lessons from franchising and the implications of devolution. Contributors included Bus Users UK, Community Transport Action, Arup and DfT.

Funding and Finance

Our Funding and Finance Group brings together key stakeholders from government, construction and the finance sector to advise on how strategic transport projects across the South East can be funded and financed.

This year, the Group has begun work to identify future funding pathways for the A27/M27 corridor. This includes exploring private finance options, supported by the development of a robust revenue evidence base, with the aim of informing a future SOBC.

EVCI Working Groups and Targeted Support

Over the last year, our work on EV charging infrastructure has focused on targeted working groups and practical support for LTAs, as delivery challenges across the South East have become more complex.

This has included identifying the main barriers facing authorities, alongside work on on-street charging, accessibility, charging for light commercial vehicles and different delivery models and technologies.

We have continued to bring together authorities and stakeholders to work through common challenges, share insight, and develop practical tools and next steps. This includes a stronger focus on topic-based working groups, allowing more detailed discussion on areas such as cross-pavement solutions, fleet electrification and approaches to bundling charging opportunities.

Modelling and Appraisal Forum

Over the last year, we hosted two TfSE Modelling and Appraisal Forum events, bringing together technical officers and managers from our constituent authorities to share experiences on analytical projects including the development of local transport models and the challenges involved.

These discussions have helped inform the development of our analytical framework, addressing common analytical and data gaps. The forum also supports cross boundary collaboration, encourages consistency in analytical approaches, and helps strengthen technical expertise and capability across LTAs.

Engagement with Universities

Universities remain a key partner for our Centre of Excellence, with engagement strengthening significantly during 2025/26. Collaboration has increased notably over the past year, particularly in supporting academic research and funding bids with Univeristies of Kent, Leeds and Liverpool. Universities will play an increasingly important role for the CoE in attracting external funding and supporting new approaches to delivery.

Transport Forum

The Transport Forum continues to bring together a wide range of stakeholders, including user groups, transport operators, environmental organisations and delivery partners.

Members played an active role in the development of major TfSE projects, including the refreshed SIP, and worked with regional university partners to explore how academia can help address key challenges across the transport sector.

Since the departure of the Forum's Chair, Geoff French, work is ongoing to maintain strong engagement and ensure members can continue to provide effective input into our work.

Wider South East Rail Partnership

We continue to contribute to the progress of the Wider South East Rail Partnership, working with Transport East (TE) and England's Economic Heartland (EEH), Transport for London (TfL), Network Rail and the DfT to bring a collaborative approach and stronger voice to improving rail across the region.

Business Advisory Group

Over the past year, we have expanded the membership of the Business Advisory Group, strengthening the business voice that supports and advises the TfSE Board.

Responding to feedback that Solent ferry services are a key transport challenge in the region, the Business Advisory Group commissioned the Solent Ferry Services Report, which set out an economic assessment of the current operating model alongside potential future options.

We also hosted the first Business Advisory Group Business Summit which explored how transport can support growth and create new opportunities for the region.

Wider South East Freight Forum

The Wider South East Freight Forum recognises that freight knows no boundaries and covers the combined geographies of three STBs - TfSE, EEH and TE. It provides informed engagement with representatives from central government, local authorities, freight operators, our ports, National Highways and Network Rail. During 2025/26, our topics have included freight decarbonisation, planning for freight best practice and guidance, lorry parking and data sharing.



Consultations

Responding to consultations is one of the key ways we champion the South East. Through a unified voice, we help shape policy development and make sure regional priorities are reflected in decisions that affect our communities and economy.

This year, TfSE has responded to 16 consultations as follows:

Originator	Consultation/Activity	Background
CIHT	Challenges in Rolling Out EV Charging Infrastructure	Creation of 'go-to' guidance document for local authorities
East Sussex County Council	Draft Rail and Freight Strategies	Future vision for the delivery of improvements to rail travel and freight in East Sussex
Network Rail	East Sussex Coast and Marshlink Strategic Study	Views on the strategic study
DfT	A Railway Fit for Britain's Future	Views on new policies to be included in the Railways Bill
Kent County Council	Letter in support of Kent Sussex Connect	Views on the Marshlink line
South Downs National Park Authority	Draft South Downs National Park Partnership Management Plan	Views on policies and priorities identified in the draft plan
Isle of Wight Council	Draft Island Transport Plan 4	Response to visions and objectives in the draft plan

Continues over page

Originator	Consultation/Activity	Background
DFT	Joined-Up Journeys – Achieving and Measuring Transport Integration	Consideration of costs and benefits of integrating transport, and influences on investment and policy outcomes
Brighton & Hove City Council	Our City Transport Plan 2035	Views on principles and objectives in draft plan
Active Travel England	Developing the Third Cycling and Walking Investment Strategy (CWIS3)	Views on the vision, objectives and practicalities of CWIS3
National Energy System Operator	Transitional Regional Energy Strategic Plan (tRESP) consultation	Feedback on key components of tRESP
GOV.UK	Proposals for Local Government Reorganisation	LGR proposals in Sussex & Brighton and Hampshire & The Solent.
National Energy Systems Operator	tRESP Methodology Consultation	Feedback on methodology used for tRESP
UK Gov: Transport Select Committee	Supercharging the EV Transition	Measuring the effectiveness of the transition to electric vehicles
MHCLG	National Planning Policy Framework (NPPF)	Seeking views on the revised NPPF and other changes to the planning system
DfT/Office for Zero Emissions Vehicles	HGV CO2 UK regulatory framework	Seeking views on the regulatory framework supporting the transition to zero emission HGVs

Finances

TfSE is funded by contributions from our constituent authorities and grant funding from the DfT. This mixed approach to funding reflects our commitment to delivering best value for our partners and taxpayers.

Funding developments

In Autumn 2025, the DfT announced it will end dedicated funding for STBs in March 2027, with limited transition funding in 2025/26.

Our Partnership Board has highlighted the importance of transition funding in securing the resources needed to support LTAs in the future, whether through an evolved TfSE or alternative structures.

We will continue to ensure the ambitions of the Transport Strategy are reflected in the policies and programmes of government, its arm's length bodies, and other delivery partners. However, without additional funding, including from LTAs, it will not be possible to deliver all the work currently valued and best delivered regionally.

We are working with our board and local authority members to consider a sustainable operating model once DfT funding ends in March 2027. Options under consideration include increasing LTA contributions using Local Transport Grant revenue, seeking private sector sponsorship and developing a subscription model alongside a 'core' TfSE offer. These options will be further considered during 2026/27.

Where our Income Comes From

In 2025/26, we received just under £500,000 from our constituent authorities. This funding is used to support our operational and staff costs. The approach to calculating contributions was developed with members and reflects the relative size of each authority. The formula has remained unchanged for the last eight years.

We were allocated £2,161,666 in funding from the DfT, an increase of £96,666 compared to 2024/25. This funding allowed us to progress key areas of our programme including the Centre of Excellence and the completion of the Transport Strategy refresh and SIP.

Our total income for 2025/26 was £4,362,052. This includes carry forward from the previous year, alongside TfSE's reserves which we cannot spend but must be held in the event the organisation is wound up.

How We Spent our Money in 2025/26

ITEM	Budget	Expenditure	Carry forward
Salaries (including on-costs)	1,319,857	1,209,726	110,131
Training	20,000	2,894	17,106
STAFFING	1,339,857	1,212,620	127,237
Transport Strategy	120,737	97,975	22,762
SIP Refresh	98,000	121,425	-23,425
SIP implementation	482,473	343,854	138,619
Analytical framework	546,984	366,022	180,962
Future mobility	40,000	0	40,000
Active travel	45,000	0	45,000
Decarbonisation	40,000	10,000	30,000
Freight	185,758	139,853	45,905
Rail	75,000	85,322	-10,322
Electric Vehicle Infrastructure	129,319	131,744	-2,425
Centre of Excellence	251,759	153,355	98,404
Private Financing	104,435	0	104,435
Other costs/technical support	150,000	111,257	38,743
TECHNICAL PROGRAMME	2,269,465	1,573,668	695,797
Events	40,000	49,766	-9,766
Communications	14,000	100	13,900
Publications	5,000	0	5,000
Website	0	4,842	-4,842
Stakeholder Database	0	9,371	-9,371
COMMUNICATIONS/ENGAGEMENT	59,000	64,079	-5,079
TfSE Governance	0	10,860	-10,860
Operational Expenses	75,000	19,779	55,221
OTHER	75,000	30,639	44,361
TOTAL EXPENDITURE	3,743,322	2,868,146	875,176

TfSE endeavours to spend all our grant funding each year, apart from our TfSE reserve. In 2025-2026, expenditure was lower than hoped with a technical programme underspend of £695,797. Of this figure, £332,407 was uncommitted, and available to deliver additional technical work in 2026-2027.

This underspend was due in part to the uncertainty of future funding, following the announcement that the DfT STB funding will cease after FY 2026/27. Postponement and reduction in the scope of planned projects for 2025-2026 allowed for a robust 2026-2027 business plan that will enable TfSE to continue supporting LTAs at a time of great change.

The remaining £363,390 is committed carry forward for technical work that is underway and will be finished in 2026-2027.

FUNDING 2025/26	
Local Contributions	498,000
DfT Grant	2,161,666
Carry Forward	1,205,656
TOTAL FUNDING	3,865,322
TfSE Reserve	496,730
TOTAL FUNDING INCLUDING RESERVE	4,362,052

CARRY FORWARD	1,493,907
CARRY FORWARD NOT INCLUDING RESERVE	997,177

Accountable Body

As part of TfSE's establishment in 2017 it was agreed that East Sussex County Council (ESCC) would act as the organisation's accountable body. During this time, TfSE's processes and procedures have followed those of the accountable body. In addition, the Section 151 Officer at ESCC has financial oversight of TfSE's budget, ensuring effective review of governance over financial decisions.

Audit and Governance Committee

The Audit and Governance Committee provide an independent, high-level focus on the audit, assurance and reporting framework underpinning financial management and governance arrangements for TfSE. The Committee meets quarterly and has overseen the approval of TfSE accounts to the Partnership Board.

The Committee also monitors risk and performance by reviewing the risk register, ensuring progress is made with mitigating actions. The Committee reports finding, conclusions, recommendations and effectiveness of the governance, risk management and internal controls to the Partnership Board with quarterly update reports.



Partnership Board

The Partnership Board is our main decision-making body, bringing together leaders from the public and private sectors. Its membership spans local authorities, business organisations, protected landscapes and national delivery partners, ensuring a broad range of expertise and perspectives.

The Board meets quarterly, with meetings open to the public. Agendas, papers and minutes are published on our website.

The Partnership Board's members for 2025/26 were:



Chair

Cllr Keith Glazier OBE

East Sussex County Council



Deputy Chair

Cllr Simon Curry

Medway Council

Cllr Trevor Muten
Brighton & Hove City Council
Cabinet member for Transport, Parking and Public Realm

Cllr John Ennis
Reading Borough Council
(representing Berks Auths)
Lead Councillor for Climate Strategy and Transport

Cllr Paul Fuller
Isle of Wight Council
Member of Economy, Regeneration, Transport and Infrastructure Committee

Cllr Lulu Bowerman
Hampshire County Council
Executive Member for Highways and Waste

Cllr Peter Osborne
Kent County Council
Cabinet Member for Highways and Transport

Cllr Peter Candlish
Portsmouth City Council
Cabinet Member for Transportation

Cllr Christie Lambert
Southampton City Council
Deputy Leader and Cabinet Member for Transport

Cllr Matt Furniss
Surrey County Council
Cabinet Member for Transport and Infrastructure

Cllr Joy Dennis
West Sussex County Council
Cabinet Member for Highways and Transport

Geoff French
Transport Forum
Independent Chair

Daniel Ruiz
Business representative
Independent Consultant

Vince Lucas
Business representative
Director VA Rail

Cllr Sophie Cox
District & borough authorities representative

Cllr Matt Boughton
District & borough authorities representative

Mark Potter
South Downs National Park Authority
Protected landscapes representative

Dave Hooper
Network Rail
Managing Director, Southern Region

Richard Leonard
National Highways
Network Planning Director

Shamal Ratnayaka
Transport for London
Aviation Strategy Lead

Looking Ahead

A Challenging Environment

The year ahead will be shaped by continued uncertainty, with funding pressures, limited capacity and the impacts of devolution and LGR all affecting the ability of LTAs to plan and deliver. For many, this will mean difficult decisions about priorities and pace lay ahead.

But this is also a moment to reshape the future, with an opportunity to strengthen alignment between local and regional priorities, improve decision making, and make better use of collective expertise.

Supporting Local Authorities

In this context, our role is to provide practical support and a clear sense of direction. Working in close collaboration with LTAs, we will continue to strengthen the shared evidence base, offer targeted support through the CoE, and create opportunities to share knowledge and experience across the region. This collaborative approach has underpinned progress to date and will remain central in the years ahead.

Working Together for What Comes Next

We provide a platform to work collectively on shared challenges, while respecting local priorities and decision making. It brings together insight, expertise and a regional perspective to support more confident, informed choices, particularly where issues are complex or cross-boundary. We will continue to work alongside partners to navigate change and help shape a more aligned, effective approach to transport across the South East.



TRANSPORT FOR THE South East

Transport for the South East
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St Anne's Crescent
Lewes
BN7 1UE

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Agenda Item 9

Report to:	**Partnership Board –Transport for the South East**
Date of meeting:	**13 July 2026**
By:	**Chief Officer, Transport for the South East**
Title of report:	**Business Planning 2026/27**
Purpose of report:	**To approve Transport for the South East's Business Plan for 2026/27, following the announcement of Government funding.**

RECOMMENDATION:

The Members of the Partnership Board are recommended to approve Transport for the South East's updated Business Plan for 2026/27, following the announcement of Government funding.

---

1. Introduction

1.1 An updated Business Plan 2026/27 is presented to the Partnership Board for approval, following sign-off from the Transport Secretary and the announcement of Government funding of £1.5m for 2026/27.

2. Background

2.1 TfSE's Partnership Board approved the draft Business Plan in December 2025 and agreed for it to be submitted to the Department for Transport, to enable the Transport Secretary to set Sub-national Transport Bodies funding settlements for 2026/27.

2.2 At that time, the Business Plan was profiled against the provision of £1.5m of transitional funding for 2026/27, the DfT having previously stipulated that there would be no further funding for TfSE beyond March 2027.

2.3 The Director General for Public Transport and Local Group wrote to TfSE's chair on 23 January 2026, confirming the allocation of transition funding of £1.5 m. A copy of this is included in **Appendix 1**. Following this, the Transport Secretary wrote to TfSE's chair on 26 January, confirming that the full amount that had been requested had been allocated in recognition of the challenges ahead with devolution and local government reorganisation. The letter also confirmed TfSE's role as a valued partner to the DfT. A copy of the letter is included in **Appendix 2**.

3. Updates to the Business Plan

3.1 The updated Business Plan 2026/27 is attached in **Appendix 3**. The cost information in the work programme has been updated to reflect the following:

- A reduction in forecast staffing expenditure to reflect changes to TfSE's staffing complement during 2026/27.

- An increase in technical programme expenditure to reflect the higher than anticipated carry forward from 2025/26, compared with the assumptions used when the Business Plan was submitted to the DfT in December 2025.
- Reductions in communications and operations expenditure to better reflect anticipated expenditure levels in 2026/27.
- The removal of anticipated income and expenditure associated with private sector contributions and subscriptions, as further work is required to determine how these mechanisms could operate in practice. Proposals will be presented to the Board in October 2026, with a view to implementation in 2027/28.

3.2 A number of changes have been made to the work programme presented in Appendix 1 to the Business Plan. These include the following:

- Refinement of project scopes to reflect progress made during the final quarter of 2025/26, ensuring activity in 2026/27 is focused on remaining priorities and delivery needs.
- Expansion of the technical programme to reflect the increased budget available for commissioned work in 2026/27.
- Addition of follow-on projects and workstreams arising from evidence, recommendations and stakeholder feedback generated through work completed in 2025/26, ensuring momentum is maintained and previous investment is fully realised.
- Revisions to the programme to improve alignment between related workstreams, reducing duplication and ensuring that individual commissions contribute more effectively to wider programme objectives.

4. Next Steps

4.1 Once the Partnership Board has agreed the updated Business Plan, this will confirm how funding is to be allocated to each budget line for 2026/27. This will enable the work programme for the year to be finalised.

4.2 The finance team at ESCC are still in the process of reviewing and updating the TfSE reserve figure. This funding would be accessed in the event that TfSE needed to be wound up. The reserve figure for 2025/26 has been used for planning purposes. Any update to this reserve figure and to the work programme for 2026/27 will be reported to the Partnership Board meeting in October 2026.

5. Conclusions and recommendations

5.1 The Partnership Board is recommended to approve Transport for the South East's updated Business Plan for 2026/27.

RUPERT CLUBB
Chief Officer
Transport for the South East

Contact Officer: Mark Valleley
Email: mark.valleley@transportforthesoutheast.org.uk

Appendix 1- 2026/27 funding confirmation letter

Department for Transport

From Director General, Public Transport and Local Government
Conrad Bailey

Great Minster House
33 Horseferry Road
London
SW1P 4DR

Tel: 07966 511823
E-Mail: conrad.bailey@dft.gov.uk

Web site: www.gov.uk/dft

Sent by email to:
cllr.keith.glazier@eastsussex.gov.uk

Copy: Rupert.clubb@eastsussex.gov.uk

23 January 2026

Dear Cllr Glazier,

Transport for the South East Sub-national Transport Body (STB) Transition Funding Allocation 2026/27

I am writing to confirm the transition funding allocation for Transport for the South East, for the next financial year 2026/27 of £1,500,000.

This funding recognises the work you and your members have done already to progress towards a more locally driven model of pan-regional collaboration and the proposal you submitted regarding how this transition funding would be used to support that.

As you are aware, there will be no further central government funding for Transport for the South East beyond March 2027, however STBs will remain valuable partners to the Department and its agencies as they continue to provide regional advocacy and support to their members.

I would like to put on record my thanks to the team and CEO of Transport for the South East for their work and leadership in this process.

My colleague Dan Taylor will soon write to your CEO, to ask them to confirm acceptance of this funding allocation as an amount which will enable Transport for the South East to action your FY2026/27 workplan and transition plan.

Funding will be granted under Section 31 of the Local Government Act 2003, for the financial year 2026/27. This funding will be paid in two equal instalments. If the allocation is accepted, a Grant Determination Form will be issued for your accountable Section 151 officer to sign and return for the first instalment in early 2026/27. The second instalment will be paid part way through the year pending a successful progress review on transitional arrangements for FY2027/28.

Please do not hesitate to contact me or Dan Taylor if you have further questions.

Yours sincerely,



Conrad Bailey
Director General for Public Transport and Local Group

Appendix 2 – Supplementary letter from the Transport Secretary

Department for Transport

From the Secretary of State
Rt Hon Heidi Alexander MP

Great Minster House
33 Horseferry Road
London
SW1P 4DR

Tel: 0300 330 3000
E-Mail: heidi.alexander@dft.gov.uk

Web site: www.gov.uk/dft

Councillor Keith Glazier
Chair, Transport for the South East
County Hall
St. Anne's Crescent
Lewes
BN7 1UE

26 January 2026

Dear Councillor Glazier,

Transport for the South East Transitional Funding Allocation 2026/2027

Thank you for sending me Transport for the South East's transitional workplan and your letter of the 12 November 2025. I am sorry that you have not had an earlier response.

You will now, however, have received your funding allocation letter from Conrad Bailey. I am pleased that we have been able to provide you with your full requested amount. I recognise that there are specific challenges ahead in your region with ongoing changes to Local Government Reform and the delay in mayoral elections.

Whilst I cannot unfortunately provide any further central government funding to Transport for the South East beyond 2026/27, I hope this amount will support you to transition into a locally funded organisation which continues to support transport in the South East. TfSE is a valued partner to the Department, and my officials will continue to engage with you as your plans unfold.

I look forward to seeing how your plans progress and develop in the coming year and beyond.

Yours sincerely,

Rt Hon Heidi Alexander MP

SECRETARY OF STATE FOR TRANSPORT

Appendix 3 - TfSE Business Plan 26/27

Final Design Work Pending

BUSINESS PLAN 2026-2027

June 2026

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ABOUT US

Transport for the South East (TfSE) is the Sub-national Transport Body (STB) for the South East of England, established in 2017. It brings together 16 local transport authorities, district and borough councils, protected landscapes, business representatives, and national agencies such as Network Rail, National Highways and Transport for London. This partnership is designed to address the strategic transport needs of the region, which covers a diverse area including major urban centres, rural communities, and coastal towns. The South East is a key driver of the UK economy and serves as a major international gateway for people and goods.

Mission and Vision

TfSE's mission is to grow the South East's economy by delivering a safe, sustainable, and integrated transport system. The organisation aims to improve the quality of life for residents, visitors, and businesses, while preserving the region's unique and diverse environment. By 2050, TfSE envisages the South East as the world's leading region for sustainable economic growth, with a clean, safe, and seamless transport system that better connects lives and businesses, supports job creation, and protects the environment.

What Does TfSE Do?

TfSE plays a strategic role in shaping transport policy and investment across the region. Its main responsibilities include:

- **Strategic Planning:** Developing evidence-based strategies and plans, such as the Transport Strategy and Strategic Investment Plan (SIP), which set out priorities for transport infrastructure investment and guide future development.
- **Partnership and Collaboration:** Working closely with local authorities, transport providers, businesses, and stakeholders to ensure that funding and strategic decisions are informed by local knowledge and priorities.
- **Centre of Excellence:** Building the capability of local transport authorities, sharing best practice, and supporting the development of evidence-led transport schemes.

- **Policy Alignment:** Ensuring close alignment between local and national government, acting as a 'golden thread' that connects local transport plans with national investment strategies.
- **Driving Investment:** Speaking with one voice on the region's transport priorities to make a strong case to government for the investment needed to boost the South East's economy and improve connectivity.

STRATEGIC PRIORITIES

TfSE's work is guided by five key missions:

- **Strategic Connectivity:** Improving links across local, regional, and national networks, especially by public transport, to support economic growth.

- **Resilience:** Ensuring the transport system can adapt and respond to change, offering reliable journeys and managing risks.

- **Inclusion and Integration:** Making transport more accessible and better connected for everyone, tackling social exclusion.

- **Decarbonisation:** Supporting the transition to alternative fuels and promoting sustainable travel.

- **Sustainable Growth**: Enabling prosperity through well-planned, low-carbon development.

OUR REGION

The Transport for the South East (TfSE) region covers a large and diverse area of southern England, including major urban centres, rural communities, and coastal towns. TfSE is a partnership of 16 upper-tier local transport authorities: Brighton & Hove, East Sussex, Hampshire, Isle of Wight, Kent, Medway, Portsmouth, Southampton, Surrey, West Sussex, and the six Berkshire authorities (West Berkshire, Reading, Slough, Wokingham, Bracknell Forest, Windsor & Maidenhead). These local authorities work alongside district and borough councils, protected landscapes, business representatives, and national agencies such as National Highways, Network Rail and Transport for London. TfSE provides strategic leadership, aligning local and national transport priorities, and acts as a 'golden thread' connecting local transport plans with national investment strategies. The governance model is collaborative, with constituent authorities and partners shaping policy, investment, and delivery through the TfSE Partnership Board and thematic working groups.

The region is home to over 7.8 million residents and around 350,000 businesses, making it one of the UK's most populous and economically significant areas. The population is diverse, with vibrant cities, university towns, and rural communities. The South East contributes approximately £228 billion in gross value added (GVA) to the UK economy, with ambitions to boost this to £300 billion by 2050.

Recent regional travel surveys show varied travel behaviours across the 16 local transport authorities, with differences in car ownership, public transport use, and active travel. The region's population is projected to grow by 16% over the next 25 years, increasing demand for housing, jobs, and transport services.

MAP OF TfSE AREA

Our region continued...

Transport Connectivity

TfSE is a national and global hub for connectivity and commerce. The region hosts the UK's two largest airports, Heathrow and Gatwick, which together handle millions of passengers and freight annually. It includes some of the busiest motorways (M25, M3, M4, M23) and vital railway connections linking London, the rest of Britain, and mainland Europe. Several of the UK's busiest seaports, such as Dover and Southampton, are located here, making the South East the primary international gateway for people and goods.

While connections into London are generally strong, many orbital and east-west corridors are poorly served. It is often faster to travel between South Coast towns via London than directly along the coast, which limits agglomeration benefits and economic growth in coastal communities. Some areas, especially those served by branch lines or secondary corridors, have significant connectivity gaps. International gateways also face challenges, such as limited public transport access beyond London and vulnerability to delays at key ports.

CHALLENGES TO ECONOMIC GROWTH

Despite its strengths, the TfSE region faces several challenges:

- **Poor Strategic Connectivity:** Orbital and east-west transport links are underdeveloped, hindering economic growth outside London-centric corridors.

- **Reliance on Private Cars:** High car dependency makes it difficult to reduce carbon emissions and congestion, especially in areas with limited public transport options.

- **Freight and Logistics:** The region's ports account for 15% of all UK freight volumes, but there is a shortage of intermodal rail freight interchanges, limiting the shift from road to rail and constraining the government's railfreight growth targets.

- **Asset Condition and Maintenance:** Highway assets are growing due to development, but funding for maintenance is not keeping pace, especially on lower-classified roads.

- **Decarbonisation and Resilience:** The need to decarbonise transport and make the network resilient to climate change and extreme weather is urgent. TfSE's £45 billion investment plan aims to address these issues, but delivery requires integrated approaches across institutional and sectoral boundaries.

- **Socio-Economic Disparities:** While the region is prosperous overall, there are pockets of deprivation and social exclusion. Levelling up access to opportunities, improving safety, and supporting inclusive growth are key priorities.

The TfSE region is a dynamic, economically vital area with complex governance, diverse demographics, and significant transport assets. Its challenges—strategic connectivity gaps, car dependency, freight bottlenecks, infrastructure maintenance, and the need for

decarbonisation—are being addressed through collaborative leadership, evidence-led strategies, and ambitious investment plans. TfSE's vision is to create a region that leads in sustainable, net-zero carbon growth, offering the highest quality of life for all.

CURRENT POSITION

TfSE has operated a mixed funding model since 2017. Initially funded by local transport authority contributions and then subsequently supported by the DfT through section 31 grant. However, the DfT has stated dedicated funding for STBs will end in March 2027 with limited transitional funding made available in 2026/27 to support the move towards new collaboration models.

Since this announcement we have worked with our Board and in particular our local authority members to determine a sustainable operating model when funding ceases in 2027. The board have stressed the importance of the transition funding in order to secure the tools, products and workstreams to enable a future body to take on these products to support local authorities either as an evolved TfSE or alternative body/bodies.

All local authorities agree with the principles for pan-regional collaboration and support a continued role for TfSE. TfSE should work to ensure the ambitions of the Transport Strategy are reflected in the policies and programmes of government and its arm's length bodies, as well as the work of other delivery partners. Almost all areas of work currently delivered by TfSE are 'valued' (i.e. local authorities have a degree of willingness to pay) and are thought to be best delivered at a regional scale.

Board members highest priority areas include:

- Regional Transport Strategy development;
- Strategic rail planning and case-making;
- Freight planning and research;
- Network resilience research and knowledge sharing;
- Identifying and evidencing investment priorities;
- Providing data free of charge/reduced cost for local and regional use, including the Regional Evidence Base;
- Advocacy – amplifying local voices to government;
- Providing pan-regional governance;

- Enhancing capability through the Centre of Excellence; and
- Potential to deploy/share staff resources.

All authorities want to continue to support TfSE and identified that TfSE could provide support and consistency through a period of significant change for local government.

Current position continued…

There is recognition that TfSE also needs to evolve, noting local authorities are 'evolving' as a result of Local Government Reform and Devolution agendas.

Local authorities were confident or very supportive of providing contributions in line with today's levels. However, without additional funding, including from local authorities, it will not be possible to deliver fully on all areas of work that are valued and best delivered regionally.

Some of our local authorities consider it possible they could provide higher levels of funding (up to two times current levels) or would strongly advocate for the emerging Mayoral Strategic Authorities to provide higher levels of funding - typically, larger authorities were most likely/willing to contribute more.

Some noted that there is new additional Local Transport Grant revenue funding from the DfT and a small proportion of this could cover existing and additional costs to continue receiving higher levels of benefit from TfSE – this would be much better to finding funding from other local funding sources /taxes.

Generally, there are high levels of support for seeking private sector sponsorship and developing a 'subscription model' for bulk buying (e.g. data) to get economies of scale, and/or for accessing higher value services (e.g. model access, time from subject matter experts).

There was a recognition that for one-off costs, that this could be factored into business planning as additional (e.g. renewing the Regional Transport Strategy, a model upgrade).

FUTURE FUNDING

Local authority core funding

Options aligned to this include:

- increase local authority contributions (without match);
- increase local authority contributions (only with match);
- seek funding from local highway authorities under MSAs.

Local authorities have flexibility to use new Local Transport Grant for regional collaboration, however they also face their own pressures. Given the structural changes of both devolution and local government reorganisation the Board is of the view that they cannot agree a budget or commit a budget pressure for an authority that is not yet established. In other words, the Board consider they are not able to set a budget for 2027/28 given the significant level of change and uncertainty.

Subscription model funding

Aspects of TfSE's offer are and could be of benefit to some but not all authorities or are larger one-off tasks (e.g. Regional Travel Survey). For those authorities that benefit or for 'one off' larger commissions, a subscription model option could include access to:

- analytical frameworks;
- data and analysis/insights;
- training;
- expert/technical advice;
- project/programme management;
- procurement framework access;
- collective buying (e.g. data, EVCI).

The success of a subscription model is dependent on an adequate level of core funding.

'**Third party' funding**

The DfT has indicated that it would be acceptable for STBs to seek funding from 'third parties'.
Options include:

- private sector funding – access to forums, conference subscription, webinars
- funding bids (e.g. for innovation)

Future funding continued…

Proposed future arrangements

The general consensus of the Board is they support the work of TfSE and wish to see TfSE continue in some shape or form, recognising the importance of the regional evidence base, the regional advocacy and the importance of the Centre of excellence. Given lower levels of funding the future operating model builds on the areas the board considers adds value, specialising in three principal areas:

- One Voice – Regional Advocacy
- Developing and maintaining a Regional Evidence Base for the benefit of all partners
- Enhancing capability across the region through the Centre of Excellence



These areas will encompass a smaller team of dedicated staff, a technical programme to support the goals of TfSE, and a focused engagement programme to maximise the partnership's collective aspirations.

Future funding continued...

Regional Advocacy

- Continued development and enhancement of the Strategic Infrastructure Plan.

- Business case development for the highest priority infrastructure needs and advocating for inclusion into national funding programmes.

- Communication and engagement across the region, including operators and businesses, with other regions, and with government departments and agencies.

Regional Evidence Base

- Purchasing data and its analysis cost effectively (e.g. Mobile Network Data, Regional Travel Survey).

- Development and maintenance of the analytical framework to support better case-making, as well as supporting existing and new authorities with Local Transport Plans, Local Plans/Spatial Development Strategies, and Local Growth Plans (e.g. SEELUM, SEHAM).

- Focused areas of research with localised outputs to support all LTAs in the development of their own local policies (e.g. EV fleet charging forecasts, freight warehousing study).

Centre of Excellence

- Tailored capability training for officers (e.g. business case development, economic appraisal, transport strategy development, Regional Travel Survey).

- Knowledge sharing through webinars (e.g. innovation in transport modelling, transport evidence bases and assessments for Local Plans, Integrated Sustainability Assessment, use of AI).

- Access to specialist expertise to support and advise (e.g. strategic modelling procurement advice, economic appraisal surgeries).

TfSE are perfectly positioned to provide support to local transport authorities during this time of significant change - supporting the DfT in achieving their ambitions.

2026/27 BUDGET AND EXPENDITURE PROPOSAL

The 2026/27 proposal seeks to propel TfSE into a ready state ensuring the products, tools and support are ready to be adopted either by a continuing TfSE or provided to local transport authorities should a sustainable operating model be unachievable.

The detailed programme and rationale are contained in Appendix 1.

The TfSE board agreed the budget proposals and programme at their November meeting. This seeks £1.5m transition support from the DfT. It provides for a reduction in the overall staff complement and includes use of the forecast carry over. Members have indicated the continuation of their existing level of contribution and in doing so the board note that local

authorities face unprecedented budget pressure, notably through demand for social care and SEND provision.

This proposal includes further work to explore the potential role of subscription model as part of any post March 2027 operating model. Any future proposals will be brought back to the Board for consideration.

2026/27 Budget and Expenditure

ITEM	BUDGET
Salaries (including on-costs)	£783,000
Training	£10,000
STAFFING	**£793,000**
SIP Refresh	£36,000
Priorisation Tool Update	£7,500
Rail Governance	£68,000
Funding and Financing	£73,000
Regional Advocacy	**£184,500**
Model Development	£959,000
Data Management	£208,000
EVCI Programme	£97,000
Freight Programme	£121,000
Regional Evidence Base	***£1,385,000***
Project Management	£10,000
Freight Planning	£145,000
Scheme & Business case development	£58,000
Capability Support	£136,000
Centre of Excellence	***£349,000***
Other Technical Work	£116,000
TECHNICAL PROGRAMME	**£2,034,500**
Events	£25,000
Communications	£2,000
Website	£8,000
Stakeholder database	£10,000
COMMUNICATIONS/ENGAGEMENT	£45,000
TfSE Governance	£35,000
Operational Expenses	£30,000
OTHER EXPENDITURE	**£65,000**
TOTAL EXPENDITURE	**£2,937,500**

FUNDING	
Local Contributions	£498,000
DfT Grant	£1,500,000
Carry Forward	£939,176
TOTAL FUNDING	**£2,937,176**
TfSE Reserve	£496,730
TOTAL FUNDING INCLUDING RESERVE	**£3,433,906**

CONCLUSION

TfSE stands at a pivotal moment. As dedicated central government funding is set to end in March 2027, the organisation and its partners have proactively explored sustainable models to ensure continued regional collaboration and leadership in transport strategy.

There is strong consensus among local authorities and stakeholders that TfSE's work, particularly in regional advocacy, evidence provision, and capability building, remains highly valued and best delivered at a regional scale. However, the ability to maintain the full breadth of current activities will depend on securing new funding streams, including increased local contributions, private sector support, and innovative subscription models.

The proposed future arrangements focus on three core pillars:

- **Regional Advocacy**: Speaking with one voice to influence national policy and investment.

- **Regional Evidence Base**: Providing robust data, models, and analysis to underpin local and regional decision-making.

- **Centre of Excellence**: Building local capacity and sharing best practice across the region.

TfSE's collaborative approach, strategic leadership, and commitment to evidence-led investment are crucial for addressing the South East's transport challenges and supporting economic growth. The continued success of TfSE will depend on the willingness of partners to invest in shared priorities and adapt to a changing funding landscape, ensuring the region remains a national and international leader in sustainable transport.

APPENDIX 1

Technical work programme for 2026/27

Regional Advocacy			
· Continued development and enhancement of the **Strategic Infrastructure Plan**. · **Business case development** for the highest priority infrastructure needs and advocating for inclusion into national funding programmes. · **Communication and engagement** across the region, including operators and businesses, with other regions, and with government departments and agencies.			
Workstream	**Deliverables**	**Rationale and Benefits**	**£**
Strategic Investment Plan (SIP) -completion and digital presentation - Provide strategic advice to the Secretary of State on regional investment priorities, based on robust evidence and stakeholder engagement aligned with government objectives.	• Final SIP deliverables • Updated MP/Mayor area factsheets • Updated digital StoryMap	Completes the refreshed SIP with a final document and communications materials, enabling the region and its partners to clearly articulate transport priorities and communicate them effectively. Fact sheets enable MPs and Mayors to understand and articulate transport priorities set out in the SIP.	£36,000
Delivery Action Plan/Strategic Prioritisation Tool update - Manage and monitor delivery of SIP schemes, maintain SIP as a live document, and provide agile strategic advice to the Secretary of State, Great British Railways, National Highways, and Network Rail on regional investment priorities.	• Update Prioritisation Tool to reflect refreshed SIP schemes • Establish a framework for annual SIP updates to keep it a live document.	Updates the Delivery Action Plan (DAP) and Prioritisation Tool following the SIP refresh. The DAP tracks scheme progress, ensures efficient resource use, and supports annual monitoring of SIP delivery. The Prioritisation Tool enables rapid responses to calls for priority schemes. Together, they help. TfSE and partners collaborate effectively on national programme delivery.	£7,500

APPENDIX 1

Rail governance - this workstream provides strategic advice to the Secretary of State, Great British Railways on the investment priorities for the region, built on a focussed evidence base and effective stakeholder engagement.	• Administer Wider South East Rail Partnership, develop Rail Plan • Deliver TfSE Rail Strategy • Lead first/last mile rail integration study.	Provides a single regional view of rail priorities, reducing duplication and offering clear, evidence based investment cases. Creates a forum for mayors and local authorities to align priorities with national programmes and strengthen funding bids. Supports operators and infrastructure partners by improving first/last mile connectivity to boost demand and optimise existing assets	£68,000

APPENDIX 1

Regional Advocacy – *continued*			
Workstream	**Deliverables**	**Rationale and Benefits**	**£**
Funding and financing - this workstream identifies and evaluates new mechanisms to fund transport infrastructure projects	Development of a high level financial model and assessment of alternative funding and financing approaches for the A27/M27 corridor.	Provides an early understanding of the potential affordability and deliverability of the corridor programme, reducing uncertainty around future investment requirements. The work will help identify credible funding and financing approaches, inform discussions with government and potential investors, and support progression towards Strategic Outline Business Case development.	£73,000

APPENDIX 1

Regional Evidence Base

• Purchasing data and its analysis cost effectively (e.g. Mobile Network Data, Regional Travel Survey).
• Development and maintenance of the analytical framework to support better case making, as well as supporting existing and new authorities with Local Transport Plans, Local Plans/Spatial Development Strategies, and Local Growth Plans (e.g. SEELUM, SEHAM).
• Focused areas of research with localised outputs to support all LTAs in the development of their own local policies (e.g. EV fleet charging forecasts, freight warehousing study).

Workstream	Deliverables	Rationale and Benefits	£
Analytical Framework - Provide strategic advice to the Secretary of State on regional investment priorities, based on robust evidence and stakeholder engagement aligned with government objectives.	• Completed TfSE Analytical Framework • Consistent and up to date regional evidence base	Maintain robust evidence base to support TfSE's work and regional advocacy; provide shared data, models and tools for technical analysis and local planning, delivering economies of scale and accelerating development for emerging MSAs.	See break-down below
SEHAM Model Rebase - this work completes the development of a highways assignment model for the south east	• Maintain South East Highway Assignment Model (SEHAM) and update base year from 2019 to 2024 • Manage Regional Interventions Log • Develop future year forecasting models.	Complete development of SEHAM for the TfSE area, providing consistent impact assessment and future forecasting to support local transport plans, spatial strategies and scenario testing. Enables coordinated use by local authorities and MSAs and supports National Highways' model refresh.	£588,000
Public Transport Model- this work builds a transport model for the region.	Podaris analytical platform to test public transport schemes.	Podaris will provide the primary analytical platform for strategic analysis and modelling, also providing a regional collaboration platform. It will also supply the required public transport data inputs, such as journey times and costs, to other components of the analytical framework.	£58,000

APPENDIX 1

Variable Demand Model - this work builds a variable demand model for the region	Develop regional variable demand model.	Delivers a tool to estimate the impact of interventions on travel behaviour including trip frequency, mode choice and destination choice, supporting policy testing and integration of network models across all transport modes.	£219,000

APPENDIX 1

Regional Evidence Base – *continued*			
Workstream	**Deliverables**	**Rationale and Benefits**	**£**
SEELUM Update - this work updates the previously developed SEELUM model with outputs from regional models described above making it more robust for use in strategy and plan development	Updated South East Economy and Land Use Model (SEELUM).	Enhances SEELUM, the region's only interactive land use and transport model, by integrating it with other transport models for greater robustness. Supports TfSE and provides local authorities and MCAs with a key tool for developing spatial strategies and local transport plans.	£97,000
Data Management - this workstream is essential to support the analytical framework	• TfSE SQL database • Visualisation & communicati on tool • 2026 regional travel survey	The SQL database provides a modern, future proof foundation for the entire analytical framework, acting as a hub to store survey data and to link models and tools with their inputs and outputs. A visualisation and communication tool sits on top of the database, enabling us to share insights, and potentially data with our partners.	£209,000
EV Programme - Provide regional leadership, evidence, tools, and partnerships to help local authorities deliver a coherent EV charging network for private and commercial fleets across the South East.	• Update EVCI Visualiser Tool • Undertake phase 2 of the on-street charging solutions study.	Provides DfT and regional stakeholders with a consistent, data driven view of the South East's electrification challenge to target investment for maximum public value. Equips mayors and local authorities with robust evidence on viability, constraints and fleet demand.	£97,000

APPENDIX 1

Regional Evidence Base – *continued*			
Workstream	**Deliverables**	**Rationale and Benefits**	**£**
Freight Programme - Strengthen regional freight planning by evidencing future needs, promoting modal shift to rail, and guiding authorities on warehousing, lorry parking, and decarbonisation infrastructure.	• Develop Freight Fuel Infrastructure Strategy • Develop guidance for local freight plans, consolidation hubs, and logistics management.	Will provide clearer understanding of infrastructure needs for supply of alternative fuels, refuelling locations and energy implications, together with practical guidance to support future planning and investment decisions.	£122,000

APPENDIX 1

Centre of Excellence

- Tailored capability training for officers (e.g. business case development, economic appraisal, transport strategy development, Regional Travel Survey).
- Knowledge sharing through webinars (e.g. innovation in transport modelling, transport evidence bases and assessments for Local Plans, Integrated Sustainability Assessment, use of AI).
- Access to specialist expertise to support and advise (e.g. strategic modelling procurement advice, economic appraisal surgeries).

Workstream	Deliverables	Rationale and Benefits	£
Project management – ensure a coordinated and manageable programme	Development and execution of a 2026/27 SME Support Plan.	Provides a clear, evidence-led programme of support aligned with identified capability gaps and stakeholder priorities. Enables investment to be targeted effectively, strengthen professional capability across the region and ensure a coordinated and a manageable programme.	£10,000
Freight Planning - strengthen the region's capacity to plan, manage and decarbonise freight activity	• Administer Wider South East Freight Forum • Develop Freight Awareness Training Programme.	Enable LTAs and fleet operators to share evidence, build confidence and overcome barriers to charging infrastructure delivery; enhance local capability, promote a consistent regional approach and accelerate targeted investment.	£146,000
Scheme and Business Case Development - build local capacity to develop schemes and business cases, by providing practical support to local authorities.	• Provide access to the TfSE analytical framework • Support efficient procurement through TfSE contracts and subject matter expertise • Offer technical advisory and regional support • Deliver training and upskilling for officers • Develop a pipeline of schemes.	Improves regional capability for scheme and business case development, saving time and supporting greater regional investment.	£58,000

APPENDIX 1

Centre of Excellence – *continued*			
Workstream	**Deliverables**	**Rationale and Benefits**	**£**
Capability Support - this workstream aims to deliver measurable capability and capacity improvements across the region	• Delivery of a programme of SME led support including webinars, roundtables, forums, training events, panels and research resources aligned to identified capability gaps and partner priorities. • Commission additional specialist support in response to emerging needs and policy developments.	Provides local transport authorities with access to specialist expertise, practical learning and peer support in priority areas including policy development, stakeholder engagement, evidence-based scheme development and freight decarbonisation. This will help strengthen professional capability, improve the quality of transport planning and support more effective delivery of local and regional transport priorities.	£136,000

Agenda item 10

Report to:	**Partnership Board –Transport for the South East**
Date of meeting:	**13 July 2026**
By:	**Chief Officer, Transport for the South East**
Title of report:	**Analytical Framework Update**
Purpose of report:	**To provide an update with the development on analytical framework.**

RECOMMENDATION:

The Members of the Partnership Board are recommended to agree the revised plan and comment on the progress with the development of an analytical framework.

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1. Introduction

1.1 This report provides an update on the development of an analytical framework to support business cases and the delivery of the schemes within the Strategic Investment Plan (SIP).

2. Background

2.1 The analytical framework route map was initially approved at the Partnership Board meeting on 23 January 2023, followed by an endorsement of the refreshed route map on 13 July 2024 to ensure its continued relevance and alignment with local challenges, while also ensuring value for money.

2.2 Following the DfT's decision to withdraw core funding for Sub-national Transport Bodies (STBs), TfSE has been provided with a final year of transition funding for 2026/27. Beyond this period, TfSE will move towards a sustainable operating model funded by our constituent partners.

2.3 The 2026/27 transition funding presents a one-off opportunity to advance the Analytical Framework to a ready-to-serve position, bringing forward activities that might otherwise have been spread over several years as originally set out in the 2024 route map.

2.4 This report provides a summary of updates on the analytical framework route map and general updates on the development of the analytical framework since the last meeting in March.

3. Analytical Framework Route Map Update

3.1 The analytical framework route map has been updated with a stronger focus on supporting LTA priorities and business case development, maximising regional benefits, ensuring the long-term sustainability of analytical capability, and prioritising the delivery of key workstreams during the 2026/27 transition year.

3.2 Significant progress has been made across all building blocks of the framework. Key achievements include: establishment of the TfSE regional Data Hub; completion of the 2024 Regional Travel Survey, generating over 6,800 responses; procurement of BT Mobile Network Data with shared access for all LTAs; and advancement of the South East Transport Model System (SETMS), on track for completion in March 2027. Since 2025, TfSE has received 32 analytical support requests from 18 organisations, reflecting growing reliance on the framework as a regional resource.

3.3 The updated strategy is structured around five objectives: enabling efficient delivery; strengthening analytical capability; improving data foundations; ensuring consistency and robustness; and building regional capability and collaboration. Eight use cases define how the framework will be applied in practice, reflecting the shift towards serving LTA needs, from data inputs for local model development through to cross-boundary impact assessment and policy testing.

3.4 Delivery is phased across two periods. In 2026/27, the priority is to complete and consolidate assets already under development, including rebasing SEHAM, conducting the next Regional Travel Survey, and completing the Variable Demand Model and regional common analytical scenarios as part of South East Transport Model System (SETMS). From March 2027, the focus shifts to application and enhancement, integrating SETMS outputs into appraisal tools including SEELUM and the EVCI tool. Total indicative expenditure across the 2026/27 programme is approximately £1.3m. A full project-level roadmap is provided at Appendix 1.

4. Data

4.1 The core component of TfSE's back-office data architecture is now in place, consisting of a virtual machine hosting a database. All data is currently being uploaded into the database, which will enable more efficient servicing of requests from LTA stakeholders. This will allow bespoke datasets to be provided to partners, aggregated on relevant metrics and appropriate geography. Investigations are underway into options for visualising data through a map viewer, including the potential to make this self-service for stakeholders.

4.2 Following the success of the 2024 Regional Travel Survey, and as approved at the Partnership Board meeting in October 2025 to make the survey a regular exercise capturing changes in regional travel behaviour, the 2026 survey is scheduled to commence in September 2026.

4.3 The origin destination travel matrices produced by the Travel Market Synthesiser are being integrated with BT Mobile Network Data. This process will enhance data granularity across transport modes, trip purposes, and socio-economic groups, producing origin destination matrices that will be made available to all LTAs in the region. This work is expected to be completed in September 2026.

4.4 Data collection of future housing and employment sites from planning authorities has been completed, with 80% of planning authorities in TfSE's geography submitting a return. For the remaining authorities, data has been sourced from publicly available documents. Data cleaning and validation will be carried out before consolidating the information into a GIS file for distribution to constituent LTAs, removing the need for individual stakeholders to collect this data independently, often at a cost for consultants time.

5. Analytical tools

5.1 In light of the transition to an LTA funded operating model, a structured review of the TfSE analytical work programme has been undertaken to ensure that available time and budget are directed towards the activities that will deliver the greatest value to partners. This has involved reprioritising and, in some cases, rescoping individual projects to reflect both the constraints of the 2026/27 transition year and the longer-term shift towards a partner-funded model. The updated delivery plan, as set out in Appendix 1, reflects the outcome of this exercise, consolidating the programme around the use cases and objectives most critical to LTA needs. This approach is consistent with the plan set out in TfSE's Business Plan, which establishes the strategic framework within which analytical investment decisions are being made.

5.2 A delivery plan for the South East Transport Model System (SETMS), comprising the South East Highways Assignment Model (SEHAM), the Variable Demand Model (VDM), model integration, and forecasting components, including a set of common analytical scenarios at the regional level has been developed. The full SETMS is scheduled to be completed by March 2027, with further application and enhancement work continuing beyond that date as set out in Appendix 1.

5.3 Phase 2 of the South East Highways Assignment Model (SEHAM) development has commenced, rebasing the model to a 2024 base year. This work will produce a robust highway model to support the regional evidence base and provide a consistent analytical tool for highway-related analysis across the South East. The first version of the 2024 SEHAM is expected to be available by the end of 2026.

5.4 Following engagement with consultants and LTA officers, TfSE has reviewed and reprioritised the development of a regional Public Transport (PT) model. It was determined that developing a sufficiently detailed regional PT model capable of testing local bus interventions is not feasible within the current programme and budget. Furthermore, this level of capability was not considered necessary by LTA officers, who are more likely to apply their own local PT models to assess schemes, or to use tools such as Podaris where local models are not available.

5.5 The regional modelling capability is considered more valuable when focused on wider strategic objectives: providing consistent multi-modal assumptions, representing cross-boundary movements, and developing future scenarios to address uncertainty. Accordingly, the budget previously allocated to the PT model has been partially reallocated to support the development of the common analytical scenarios and the Variable Demand Model, where it will deliver greater value to the programme as a whole. Podaris will continue to provide strategic-level public transport analytical functions and inputs to the wider Analytical Framework.

5.6 The scope of Variable Demand Model (VDM) has also been expanded to incorporate model integration functionalities originally listed as a separate projects in the Business Plan, particularly in relation to integrating all components of the Analytical Framework, including the Travel Market Synthesiser, to enable consistent multi-modal analysis.

5.7 A more advanced technical approach has been adopted to ensure the VDM has the potential to be developed into an activity-based analytical model in the future, when additional budget becomes available. This aligns with the recently published national transport strategy, Better Connected, which emphasises a shift in focus from individual schemes to activity and place-based planning.

6. Engagement

6.1 TfSE held its sixth South East Modelling and Appraisal Forum, at which representatives from LTAs provided updates on the development of their data and analytical tools. TfSE and Atkins Réalis also presented the proposed delivery plan for 2026/27, with officers taking part in structured discussions to provide comment on the plan.

6.2 TfSE organised two further Centre of Excellence (CoE) webinars covering an introduction to Podaris as a network planning tool, and the use of programming languages for efficient transport data analysis. Both webinars received strong engagement from participants. Building on feedback gathered through a post-webinar survey, TfSE will develop a capability building programme in AI and data science, where was identified as one of the key gaps through the CoE's LTA capabilities survey.

7. Financial Considerations

7.1 The work set out in this report is being funded from the DfT grant allocation awarded to TfSE for 2026/27.

8. Conclusions and recommendations

8.1 The Partnership Board is recommended to comment on the progress with the development on analytical framework.

RUPERT CLUBB
Chief Officer
Transport for the South East

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Appendix 1: Analytical Framework Route Map Update

1. Purpose and Context

1.1. Transport for the South East (TfSE) requires a robust, consistent, and efficient analytical capability to support the delivery of its strategic objectives. This includes enabling the implementation of the Strategic Investment Plan (SIP), underpinning the development of evidence-based regional and local transport plans, supporting the preparation of high-quality business cases, and informing spatial planning strategies at both sub regional and local levels.

1.2. The analytical framework route map was initially approved at the Partnership Board meeting on 23 January 2023, followed by an endorsement of the refreshed route-map on 13 July 2024 to ensure its continued relevance and alignment with local challenges, while also ensuring value for money.

1.3. The development of the Analytical Framework to date has been primarily supported through funding from the Department for Transport (DfT).

1.4. Following the DfT's decision to withdraw core funding for Sub-national Transport Bodies (STBs), TfSE has been provided with a final year of transition funding for 2026/27. Beyond this period, TfSE will move towards a sustainable operating model funded by our constituent partners.

1.5. This represents a significant shift in how analytical capability is prioritised, funded, and delivered. In particular:

- Analytical activities must demonstrate clear and direct value to Local Transport Authorities (LTAs);
- Investment must focus on shared tools, data, and approaches that reduce duplication and cost;
- Delivery must be prioritised and targeted within a more constrained funding environment.

1.6. The 2026/27 transition funding presents a one-off opportunity to advance the Analytical Framework to a ready-to-serve position, bringing forward activities that might otherwise have been spread over several years as originally set out in the 2024 route map.

1.7. The analytical framework route map has therefore been updated to reflect this transition, placing greater emphasis on:

- Supporting LTAs priorities and business case development;
- Maximising collective regional benefit**;**
- Ensuring long-term sustainability of analytical capability, and
- Prioritising delivery of key workstreams within the 2026/27 transition year.

1.8. This document sets out a long-term vision for the Analytical Framework and a clear delivery plan for the transition period, providing the basis for continued investment in shared analytical capability across the region.

2. Vision for the Analytical Framework

2.1. The long-term vision for the Analytical Framework is to establish a coordinated, high-quality, and accessible analytical ecosystem across the South East that supports faster and more robust decision-making.

2.2. This includes providing a consistent and credible evidence base for investment, enabling more effective multi-modal, place-based and decarbonised transport planning, and reducing duplication through the sharing of data, tools, and analytical approaches.

2.3. Overall, the framework will ensure that analytical capability across the region is efficient, aligned, and capable of supporting both strategic and local transport objectives.

2.4. In this future state, analytical framework will ensure:

- LTAs act as effective and intelligent clients;
- Analytical approaches are consistent across the region, aligned with national guidance;
- Data and models are better integrated and more accessible;
- TfSE focuses its coordinating and enabling role where regional value is greatest.

3. Strategic Challenges & Objectives

3.1. The challenges set out below build on and consolidate the eight analytical gaps identified through the 2023/24 review, reflecting both the continued relevance of those original findings and the emergence of new priorities, particularly around governance, cross-boundary collaboration, and the transition to a locally funded operating model.

3.2. These challenges have been further reviewed and validated through more recent engagement with LTAs, including targeted consultation exercises supported by external consultants, ensuring they reflect current needs and operating conditions.

3.3. This process has confirmed that many of the original challenges remain relevant, although their relative importance has evolved, alongside the emergence of new issues relating to data availability, analytical capability, coordination, and delivery.

3.4. The updated strategy is informed by the following key challenges:

Table 1 Strategic challenges

Category	Challenges
Data and Evidence	• Gaps in core datasets (travel demand, freight, active travel) • Inconsistent data quality and accessibility • Limited locally specific forecasting inputs.
Modelling Capability	• Ageing models and inconsistent standards across LTAs • Limited multi-modal representation; • Need for improved consistency and integration.

Category	Challenges
Strategic Analytical Capability	• Need for improved tools to assess decarbonisation and modal shift; • Challenges in capturing system-wide and cumulative impacts; • Limited capability for cross-boundary analysis.
Capacity and Skills	• Limited in-house analytical capability within LTAs • Continued reliance on consultants; • Need for skills development and knowledge sharing.
Governance and Collaboration	• Need for stronger coordination across stakeholders; • Opportunity for greater regional alignment and efficiency; • Need to align with national guidance and cross-STB initiatives.

3.5. Taken together, these challenges highlight the need for a more consistent, efficient, and collaborative approach to analytical capability across the region, with a stronger emphasis on shared solutions, improved data foundations, and enhanced support for LTAs.

3.6. The updated Analytical Framework Strategy is structured around five objectives:

1. **Enable efficient delivery**
2. **Strengthen analytical capability**
3. **Improve data foundations**
4. **Ensure consistency and robustness**
5. **Build regional capability and collaboration**

3.7. These five objectives represent a consolidation and reframing of the objectives set out in the 2024 plan, reflecting the shift in focus towards LTA-funded delivery and long-term sustainability of the framework.

4. Responding to the Funding Transition

4.1. The transition to an LTA-funded model requires a more targeted and value-driven approach to analytical investment. As a result, the strategy prioritises:

- Shared regional solutions that reduce cost and duplication;
- Tools and datasets with wide applicability across multiple LTAs;
- Reducing reliance on external consultancy where possible;
- Capability building initiatives to strengthen in-house expertise.

4.2. This represents a shift from a centrally supported development programme to a collaborative, LTA-focused model, designed to maximise value and long-term sustainability. The use cases set out below reflect this shift, defining the specific contexts in which the Analytical Framework will deliver value to LTAs and the region.

5. Use Cases

5.1. Alongside the updated objectives, the 2026 plan introduces a set of use cases to describe how the Analytical Framework will be applied in practice. This reflects a

deliberate shift in emphasis: where the 2024 plan was structured around what TfSE intended to build, this plan is structured around what LTAs need to do, and how the framework supports them in doing it. The eight use cases below set out the primary contexts in which analytical outputs will be applied and together provide the organising logic for the delivery plan that follows.

Table 2 Use cases

Use Case	Description
Use Case A: Data inputs to support local model development	Provide regional datasets, particularly on travel demand and behaviour, journey times, to feed directly into LTA models.
Use Case B: Evidence base for local strategies	Supply consistent data and model outputs to support Local Plans, Local Transport Plans, new Mayoral Spatial Development Strategies, carbon strategies, and wider policy development needs
Use Case B: Filling critical data gaps	Address missing or outdated data, particularly around travel behaviour, freight movements, and public transport usage.
Use Case D: Inputs to TfSE's policy testing tools	Provide the data and model outputs required for TfSE tools such as the EV Charging Infrastructure Tool (EVCI) and the Decarbonisation Playbook.
Use Case E: Donor models for LTA model development	Act as a donor or reference model where LTAs lack local models or need to extend the coverage or capability of their existing ones.
Use Case F: Model cross boundary impacts	Enable assessment of impacts that span authority boundaries, ensuring consistent modelling across overlapping or adjacent local model areas.
Use Case G: Consistent assumptions for future scenarios	Provide regionally aligned inputs, such as future growth assumptions, scenario definitions (from the TfSE Transport Strategy), adoption of new technologies, and carbon trajectories to ensure uniformity across business cases.
Use Case H: Policy testing and scenario analysis	Support testing of transport, spatial planning, and decarbonisation policies using enhanced regional modelling and integrated analytical tools.

5.2. Taken together, these use cases operationalise the five strategic objectives: efficient delivery is enabled through use cases A, C and E, analytical capability is strengthened through use cases B, D and H, data foundations are improved through use cases A and C, consistency and robustness are ensured through use cases F and G, and regional capability and collaboration are built through use cases B, E and G.

6. Strategic Approach to the Analytical Framework

6.1. The framework, as original sets out in PB paper dated in May 13th, 2024, is a structured, end-to-end analytical architecture for TfSE, designed to ensure consistency, transparency, and effective integration across data, modelling, and decision-making functions.

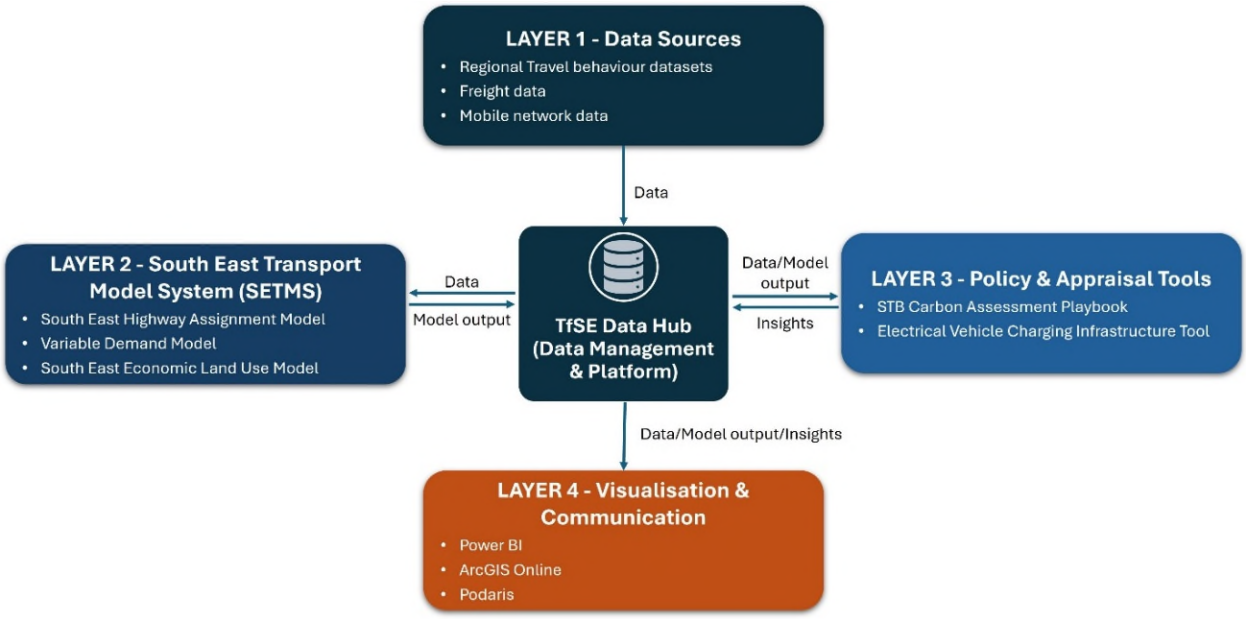


Figure 1 Analytical Framework Structure

6.2. At its core is the TfSE Data Hub, which acts as the central platform for data management, integration, and governance. This hub ingests a range of regional data sources: including travel behaviour datasets, freight data, and mobile network data, and enables their consistent application across the analytical ecosystem.

6.3. Surrounding this, the framework is organised into three functional layers. The model system layer: South East Transport Model System (SETMS) uses the data hub to produce transport demand and land-use modelling outputs, while the policy and appraisal tools layer draws on both data and model outputs to generate insights for decision-making, including carbon assessment and infrastructure planning.

6.4. Finally, the visualisation and communication layer ensures that outputs and insights are effectively translated into accessible formats for stakeholders, supporting evidence-based decisions.

6.5. The progress set out in the following section reflects delivery against this architecture, with each building block contributing to the framework's overall capability.

7. Progress Since the Previous Plan

7.1. Since the previous roadmap was endorsed in 2024, TfSE has made significant progress in all building blocks of Analytical Framework:

7.2. **Data and data hub**:

- Completed the installation of the TfSE regional Data hub which is a cloud-based SQL database. The data hub will be used to support more consistent and efficient large-scale data processing and analysis for LTAs.
- Conducted a regional travel survey, with over 6,800 public responses collected in the region, providing understanding of current travel patterns changes since before the pandemic, and supporting TfSE's strategies by providing data on travel behaviour, motivations, and potential for new mobility options.
- Published the Regional Travel Survey alongside a supporting webinar and factsheets for LTAs. The survey analysed data from over 6,800 public responses to improve understanding of regional travel patterns, behaviour and motivations. Since publication, nine LTAs have requested access to the data for their own analytical work.
- Procured BT Mobile Network Data (MND), with full access for all of our constituent LTAs. This delivers significant cost savings for partners, as individual LTA procurement would typically cost between £40k and £80k, depending on population size.
- Provided data from the GB Freight Model (GBFM) to LTAs and progressed further development to generate freight movement insights to support strategic planning and analytical work, which has been identified as a critical data gap in the region.

7.3. **Models and tools**:

- TfSE developed the 2019 South East Highways Assignment Model (SEHAM) and the Travel Market Synthesiser. Following completion of Phase 1, work commenced on Phase 2: the South East Transport Model System (SETMS).
- SETMS includes: the 2024 SEHAM: a rebase of the 2019 model incorporating the data collected through the MND and other sources described in the data section above. The Travel Market Synthesiser, a Variable Demand Model, and a Public Transport Model. Together, these will provide a robust suite of modelling tools on completion in March 2027.
- Completed a proof-of-concept study on rail modelling, shared with partners and STBs which also informed the development of SETMS.
- Worked with Podaris, an online platform for public transport intervention planning and analysis, to develop one of its first regional level platforms, enabling licence free access for partners, taken up by one of our LTAs.

7.4. Since 2025, TfSE has received a total of **32 analytical support requests from 18 different organisations**, including all LTAs in our region, and other national and local stakeholders. The volume of requests has increased over time, peaking in late 2025, reflecting both increased awareness of the framework and a growing reliance on TfSE's analytical capability to support local and regional priorities.

7.5. In terms of request types, the majority relate to data provision and analytical insights, which together account for the largest share of demand. There is also a steady requirement for advisory support and model-related assistance, with more limited demand for document-based guidance.

7.6. While a significant proportion of requests have been addressed, the level of outstanding demand highlights both capacity constraints and the importance of prioritising delivery, particularly in the context of the transition to an LTA-funded model.

7.7. Overall, the pattern of requests reinforces the role of the Analytical Framework as a key regional resource, providing data, tools, and expertise to support Local Transport Authorities and wider strategic objectives.

7.8. Apart from the established evidence base, TfSE has established the **South East Modelling and Appraisal Forums**, a platform for technical officers from LTAs to share and discuss their experiences and challenges in technical work. TfSE has successfully hosted five South East Modelling and Appraisal Forums since the forum initiated in May 2024.

7.9. TfSE is also represented on the stakeholder groups contributing to the development of DfT's National Activity Based Model, Transport East's BERTIE (BEhaviouR & Transport: Impact & Equity) and TfL's LAMP (Learnings in Activity Based Modelling in Practice) projects.

8. Delivery Plan

8.1. Building on the progress made since 2024, delivery of the Analytical Framework is now planned be phased across two periods: an immediate transition year (2026/27) and a medium-term capability enhancement phase (April 2027 onwards). This phasing reflects the shift to an LTA-funded model and ensures that investment is focused where it delivers the greatest near-term value to partners.

8.2. In collaboration with our consultants, TfSE has undertaken a mapping exercise between the key components of the Analytical Framework and its intended use cases. This has informed the priority areas for delivery set out below, with a full project-level roadmap provided at Appendix A.

8.3. The immediate priority is to complete and consolidate the analytical assets already under development, ensuring they are fit for use by LTAs during the transition period. Key activities include:

- Completing the rebase of the South East Highways Assignment Model (SEHAM), providing an updated foundation for highway modelling across the region;
- Completing the fieldwork phase of the next Regional Travel Survey, delivering refreshed travel behaviour data to support local model development and strategy work;
- Advancing the Variable Demand Model and multi-modal model integration as part of the wider South East Transport Model System (SETMS), on track for completion by March 2027; and
- Developing a set of regionally consistent analytical scenarios, aligned with the TfSE Transport Strategy, to support LTAs in addressing uncertainty in their forecasting work.

8.4. In later half of 2027, as the framework matures, the focus will shift from development to application and enhancement. This includes updating key appraisal tools: including South East Economic Land Use Model (SEELUM) and the Electric Vehicle Charging Infrastructure (EVCI) tool, to reflect the outputs of SETMS.

8.5. Throughout both phases, TfSE will continue to engage with LTAs through the South East Modelling and Appraisal Forums as the primary platform for understanding common challenges, sharing analytical outputs, and refining delivery priorities. TfSE

will also continue to strengthen its internal analytical capability, enabling it to act as an effective shared resource for the region.

8.6. The overall aim is to achieve full maturity of the Analytical Framework by the end of the medium-term period, with consistent application across TfSE's transport planning and decision-making functions.

9. Governance and Operating Model

9.1. The transition to an LTA-funded operating model requires a more explicitly defined governance structure than was necessary under the previous centrally funded arrangement. Where TfSE previously held primary responsibility for both funding and delivery of the Analytical Framework, the shift to partner funding introduces a need for clearer accountabilities, both for how analytical priorities are set and how costs are shared. The proposed governance model set out below reflects this, defining the respective roles of TfSE and LTAs and the collaborative mechanisms through which the framework will be managed going forward. This will link closely to the work being undertaken on the TfSE Future Funding Model and will be developed further as that work also progresses.

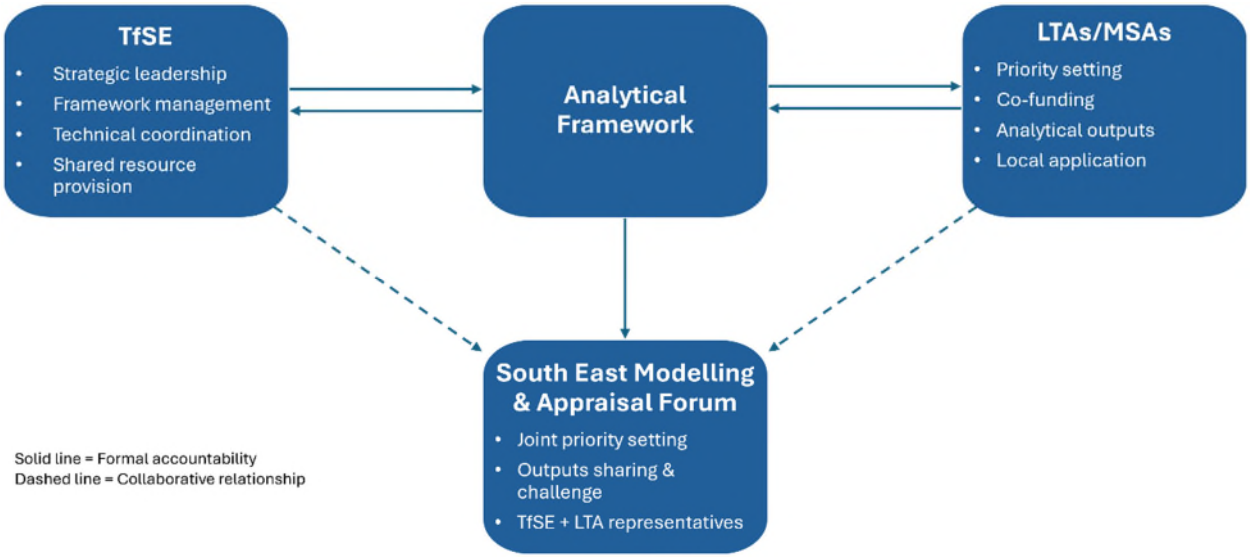


Figure 2 Analytical Framework Governance Structure

9.2. Transport for the South East will provide strategic leadership and coordination for the Analytical Framework, focusing on areas where regional intervention delivers the greatest value.

9.3. TfSE's role will include:

- Leading the development of shared data, tools, and analytical capabilities;
- Ensuring consistency and alignment with Department for Transport guidance;
- Coordinating analytical activity across the region to reduce duplication; and
- Providing technical expertise and support to Local Transport Authorities where appropriate.

9.4. LTAs will play a central role in the delivery and application of the Analytical Framework.

9.5. LTAs will:

- Provide local data and inputs to support regional datasets and models;
- Apply the framework and its outputs to support scheme development and policymaking;
- Commission additional analytical work where required; and
- Engage in collaborative processes to shape and refine analytical priorities.

9.6. Collaboration between TfSE, LTAs, and key partners will be essential to the successful delivery of the Analytical Framework. This will be supported through:

- South East Modelling and Appraisal Forums, providing a forum for technical discussion and knowledge sharing;
- Ongoing engagement with the Department for Transport and other Sub-national Transport Bodies to ensure alignment and share best practice; and
- The Regional Centre of Excellence, supporting access to data, tools, and guidance.

9.7. The Analytical Framework will operate as a shared regional resource, combining centrally coordinated analytical capability with locally delivered activity.

9.8. In practice, this means that TfSE will develop and maintain core datasets, models, and tools, while LTAs will apply these resources to their own schemes and strategies, supplemented by additional analysis where required.

9.9. This hybrid approach ensures consistency at a regional level while retaining flexibility to reflect local circumstances. Embedding this governance model will be a priority during the 2026/27 transition year, ensuring the Analytical Framework is well-positioned to deliver sustained value under the new operating model.

10. Conclusions

10.1. Since the Partnership Board endorsed the Analytical Framework route-map in May 2024, TfSE has made significant and demonstrable progress across all building blocks of the framework. The establishment of the regional Data Hub, completion of the Regional Travel Survey, procurement of shared datasets, and the advancement of the South East Transport Model System (SETMS) collectively represent a strong foundation for the next phase of delivery. The growth in analytical support requests from LTAs reflects the framework's increasing value and relevance to partners across the region.

10.2. The transition away from DfT core funding, while a significant shift, presents an opportunity to refocus analytical investment around what matters most to our partners: shared tools and data that reduce duplication, consistent modelling approaches that strengthen business cases, and capability-building that enables LTAs to act as more effective and intelligent clients. The updated Strategy and Delivery Plan has been designed with this in mind, prioritising activities that deliver the broadest regional benefit within a more constrained funding environment.

10.3. TfSE is well-placed to lead this next phase. The analytical ecosystem that has been built over the past three years spanning data, modelling, appraisal, and communication, provides a credible and capable platform from which to support both strategic and local transport priorities across the South East.

Appendix A2026/27 Analytical Framework Delivery Plan

Projects	Description	Use Cases Addressed	Timeline	Costs[1]	Has there been any change since the 2024 plan?
TfSE Data Hub, Visualisation & Sharing	Design and implement a PostgreSQL database structure, migrate existing data from SharePoint to the database, and standardise data processes based on the new infrastructure.	Enabling, the foundation for a modern, future-proof analytical framework.	May - Dec 2026	£50k	No
Mobile Network Data	Processing BT mobile network data to generate a robust view of regional travel demand.	Use Case A: Data inputs to support local model development Use Case C: Filling critical data gaps Use Case D: Inputs to TfSE's policy testing tools	Jun - Oct 2026	£50k	No
Inrix Journey Time Data	Processing INRIX journey time data to generate traffic condition on road networks	Use Case A: Data inputs to support local model development Use Case B: Evidence base for local strategies Use Case C: Filling critical data gaps Use Case D: Inputs to TfSE's policy testing tools Use Case F: Model cross boundary impacts	Mar - Sep 2026	Internal	No
Observed Traffic Count Data	Collating local traffic data from LTAs to support the development of the South East Transport Model System (SETMS)	Use Case A: Data inputs to support local model development Use Case B: Evidence base for local strategies	Jun - Oct 2026	Internal	No

[1] The costs are indicative based on discussions with the supply chain and have been rounded to the nearest £10k

Projects	Description	Use Cases Addressed	Timeline	Costs[1]	Has there been any change since the 2024 plan?
		Use Case C: Filling critical data gaps Use Case D: Inputs to TfSE's policy testing tools Use Case E: Donor models for LTA model development Use Case F: Model cross boundary impacts			
Freight Data	Processing freight data from various sources to develop synthetic freight origin destination matrices.	Use Case A: Data inputs to support local model development Use Case C: Filling critical data gaps Use Case D: Inputs to TfSE's policy testing tools Use Case F: Model cross boundary impacts	Jun - Oct 2026	£30k	No
Developments-Log / Interventions-Log	A workstream which develops a live log of TfSE Local Plans and interventions.	All use cases, provide essential data for accurate, localised travel forecasts.	Jun - Dec 2026	Internal	No, updated biennially
2026 Regional Travel Survey	A regional level travel behaviour survey designed to understand changes in travel behaviour, including how, where, and why people undertake their trips	Use Case A: Data inputs to support local model development Use Case B: Evidence base for local strategies Use Case C: Filling critical data gaps Use Case D: Inputs to TfSE's policy testing tools Use Case F: Model cross boundary impacts	Sep 2026 - Mar 2027	£100k	Yes, this follows the feedback from the 2024 regional travel survey to conduct the survey biennially, which has been approved by the Partnership Board.

Projects	Description	Use Cases Addressed	Timeline	Costs[1]	Has there been any change since the 2024 plan?
		Use Case G: Consistent assumptions for future scenarios Use Case H: Policy testing and scenario analysis			
2024 South East Highway Assignment Model (SEHAM)	Complete development of SEHAM for the TfSE area, providing consistent impact assessment and future forecasting to support local transport plans, spatial strategies, and scenario testing. Enables coordinated use by LAs/MSAs and supports National Highways' model refresh.	Use Case B: Evidence base for local strategies Use Case C: Filling critical data gaps Use Case D: Inputs to TfSE's policy testing tools Use Case E: Donor models for LTA model development Use Case F: Model cross boundary impacts Use Case G: Consistent assumptions for future scenarios	Mar 2026 - Feb 2027	£200k	No
Podaris/Public Transport Analysis Platform	Using Podaris, a public transport analysis platform, as the primary tool to support strategic analysis of public transport schemes.	Use Case B: Evidence base for local strategies Use Case C: Filling critical data gaps Use Case D: Inputs to TfSE's policy testing tools Use Case F: Model cross boundary impacts Use Case G: Consistent assumptions for future scenarios	Subscribed	£50k	The previous proof-of-concept rail modelling study found limited use for a TfSE public transport model. Developing a model at the level required for LTA bus schemes would be costly and time-intensive, if feasible. As a result, this approach has been dropped. Instead, a market review identified Podaris as the most

Projects	Description	Use Cases Addressed	Timeline	Costs[1]	Has there been any change since the 2024 plan?
					cost-effective tool for strategic public transport analysis.
Variable Demand Model/Model Integration	Provides a tool to integrate data and models across all travel modes, assess the impact of interventions on travel behaviour (trip frequency, mode choice, and destination choice), and support policy testing and network model integration	All use cases	Jun 2026 - Mar 2027	£250k	No, but we have enhanced the technical capability to potentially develop the tool as an activity-based model. This shifts the focus from schemes to activities and people, aligning with the latest national integrated transport strategy.
Regional common analytical scenarios	Using SETMS to develop a range of future scenarios aligned with the TfSE Transport Strategy, enabling the testing of future uncertainties.	Use Case F: Model cross boundary impacts Use Case G: Consistent assumptions for future scenarios Use Case H: Policy testing and scenario analysis	Mar - July 2027	£200k	Yes, this is based on engagement with LTAs, who have requested regional consistency and guidance on addressing future uncertainties.
South East Economic and Land Use Model (SEELUM)	Enhances SEELUM, the region's only interactive land use and transport model, by integrating it with other transport models for greater robustness. Supports TfSE and provides LAs and MCAs with a key tool for developing spatial strategies and local transport plans.	Use Case B: Evidence base for local strategies Use Case F: Model cross boundary impacts Use Case G: Consistent assumptions for future scenarios Use Case H: Policy testing and scenario analysis	May - Dec 2027	£100k	No

Projects	Description	Use Cases Addressed	Timeline	Costs[1]	Has there been any change since the 2024 plan?
Electric Vehicle Charging Infrastructure Tool	Enhances EVCI with the latest SETMS, to provides DfT and regional stakeholders with a consistent, data-driven view of the South East's electrification challenge to target investment for maximum public value. Equips mayors and local authorities with robust evidence on viability, constraints, and fleet demand to plan infrastructure confidently and strengthen funding bids.	Use Case B: Evidence base for local strategies Use Case F: Consistent assumptions for future scenarios Use Case H: Policy testing and scenario analysis	Mar - Dec 2027	£120k	No
South East Modelling and Appraisal Forums	Continue to organise quarterly forums as the primary platform for TfSE and its partners to discuss analytical issues and opportunities related to modelling and appraisal	Enabling	Quarterly	Internal	No
Additional TfSE Analyst	Provide support for the management and timely delivery of increased demand from LTAs.	Enabling	The second half of 2026	£50k	No

Agenda Item 11

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

Date of meeting: **13 July 2026**

By: **Rupert Clubb**

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

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

RECOMMENDATIONS:

The Members of the Partnership Board are recommended to:

1) **Agree to a formal review of the Transport Forum and Advisory Panel; and**

2) **Agree to seek the appointment of a new Chair for the Transport Forum following the completion of this review.**

1. Introduction

1.1 This paper provides an update following the decision of the current Chair of the Transport Forum and Advisory Panel, Geoff French, to step down from the role at the most recent meeting of the TfSE Partnership Board in March.

1.2 This paper also outlines the need for updates to future arrangements for the Transport Forum and the Advisory Panel and recommends that both groups are subject to a formal review.

2. Transport Forum

2.1 At the most recent meeting of the TfSE Partnership Board, Geoff French stepped down as Chair of the Transport Forum, a position he has held since its inception in 2017. Mr French has been a strong advocate for the work of TfSE, and his leadership of the Transport Forum has made a significant contribution to many of TfSE's achievements.

2.2 Following the changes in funding from the DfT the role of Sub-national Transport Bodies needs to evolve which may shift the future role they play. This includes evolving relationships with key stakeholders, business and central government. This changing landscape provides rationale for reviewing the purpose, structure and outputs of the Forum, ensuring it remains aligned with TfSE's future needs.

2.3 TfSE officers will take this opportunity to undertake a review of the Transport Forum's membership, purpose, and role to ensure that it continues to meet stakeholder

engagement needs over the coming years. Members of the Transport Forum will be fully involved in this process.

2.4 Following completion of the review, a new Chair will be appointed to lead the Transport Forum and represent its views at the TfSE Partnership Board.

2.5 The outcomes of this review will be reported to a future meeting of the Partnership Board, together with any recommendations. A further meeting of the Transport Forum will also be scheduled towards the end of 2026.

3. Advisory Panel

3.1 TfSE's Advisory Panel brings together representatives of TfSE's thematic groups, giving them the opportunity to update each other on their group's work, and feed into the business of the Partnership Board.

3.2 A number of TfSE's thematic groups have now concluded their programmes of work, resulting in a reduction in the number of active groups. It is therefore recommended that the Advisory Panel is reviewed alongside the Transport Forum. The findings of this review will be reported to a future meeting of the Partnership Board.

4. Conclusions and recommendations

4.1 The Partnership Board is recommended to agree to a review of the Transport Forum and Advisory Panel to ensure the groups reflect the needs of TfSE and its stakeholders going forward.

RUPERT CLUBB
Chief Officer
Transport for the South East

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Agenda Item 12

Report to:	**Partnership Board –Transport for the South East**
Date of meeting:	**13 July 2026**
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**

RECOMMENDATIONS:

The Members of the Partnership Board are recommended to:

(1) Agree the end of year position for 2025/26

(2) Agree the proposed budget for 2026/27 and;

(3) Note the financial update to end of June 2026.

---

1. Introduction

1.1 The purpose of this report is to update the Partnership Board on TfSE's financial position to the end of June 2026.

1.2 The paper provides the end of year financial position for 2025/26 and proposes the budget for 2026/27.

2. Background

2.1 In December 2025, the Partnership Board agreed TfSE's Business Plan for 2026/27, which set out how funding will be allocated to each of TfSE's technical work areas for the year ahead.

2.2 TfSE's Business Plan allocates DfT funding, local authority contributions, and our carry forward from the 2025/26 Financial Year.

2.3 At the time of the March Partnership Board, the financial year had not yet finished, so we could only forecast our carry forward figure at the end of 2025/26. Now that the final carry forward figure is available, the final budget for 2026/27 can be confirmed.

[Note for Senior Officers Group - all numbers are currently highlighted yellow until final figures are confirmed with ESCC Finance]

3. 2025/2026 end of year report

3.1 The end of year figures for 2025/26 are set out in full in **Appendix 1.**

3.2 TfSE's total expenditure for 2025/26 was £2,868,146 against funding of £3,865,322 and an additional £496,730 reserve.

3.3 In 2025-2026, technical programme expenditure was £1,573,668 which was lower than the overall budget by £695,797, but in line with the forecast presented to the March Board. Of this figure, £363,390 is committed carry forward for technical work that is underway and will be finished in 2026-2027. The bulk of this committed carry forward is due to Strategic Investment Plan (SIP) Implementation, Analytical Framework and Private Financing work that commenced late in 2025/26 and was not completed by the end of the financial year.

- Spend on SIP Implementation was lower than expected due to delays in scheme development support getting underway, all work has now commenced and will be completed in 2026/2027.
- Spend on the Analytical Framework was lower than expected due to delays in procurement of Mobile Network Data causing commissioning of the South East Transport Modelling System (SETMS) to be pushed to 2026/2027 Q1. Phase 1 of this work is now underway.
- Private Financing spend was lower than expected due to delays in commissioning the South East Funding and Finance Model.

3.4 The remaining £313,268 was uncommitted underspend, and is available to deliver additional technical work in 2026-2027.

3.5 This underspend was due in part to the uncertainty of future funding, following the announcement that the DfT STB funding will cease after FY 2026/27. Postponement and reduction in the scope of planned projects for 2025-2026 allowed for a robust 2026-2027 business plan that will enable TfSE to continue supporting LTAs at a time of great change.

3.6 At the end of the Financial Year, the final carry forward figure was £997,177

4. 2026/27 Proposed Budget

4.1 **Appendix 2** sets out the final budget for 2026/27, now that the final end of year figures for 2025/26 are available.

4.2 The final budget for 2026/27 is £x,xxx,xxx, based on DfT funding of £1,500,000, Local Contributions of £498,000, a Technical Programme Carry Forward of £997,176, and a Carry Forward for TfSE's reserve of £xxx,xxx

[Note – The final budget for 2026/2027 will be updated once the TfSE Reserve for 2026/27 has been calculated and agreed by ESCC]

5. Financial position update to end of Quarter 1 (June) 2026

5.1 The current financial position at the end of June 2026 is set out in **Appendix 3**. In the first quarter of 2026 TfSE have spent £xxx,xxx,xxx across all budget lines.

5.2 This is in line with expectations as only urgent new work had been commissioned between April-June while the proposed budget was calculated. Work is normally paid on completion, so the rate of expenditure will increase as the financial year progresses.

5.3 Spend will continue to be monitored as the financial year progresses, and this will be reported to the Audit and Governance Committee alongside our confidence rating in those forecasts.

6. Conclusions and Recommendations

6.1 The Partnership Board are recommended to agree the final end of year position for 2025/26, agree the proposed budget for 2026/2027, and note the financial position to the end of Quarter 1 2026/27.

RUPERT CLUBB
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Transport for the South East

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Agenda Item 13

Report to:	**Partnership Board – Transport for the South East**
Date of meeting:	**13 July 2026**
By:	**Chief Officer, Transport for the South East**
Title of report:	**Electric Vehicle Charging Infrastructure – On-Street Charging: Emerging Solutions**
Purpose of report:	**To note the contents of the technical report on the On-Street Charging: Emerging Solutions Study.**

RECOMMENDATION:

The Members of the Partnership Board are recommended to note the content of the On-Street Charging – Emerging Solutions Study report.

---

1. Introduction

1.1 The purpose of this report is to set out the findings of the On-Street Charging – Emerging Solutions Study. The study provides an evidence base on the current on-street charging landscape across the TfSE area and assesses emerging technologies and complementary approaches that are being applied to reduce pressure on kerbside infrastructure and improve affordability and equity of access.

2. Background

2.1 On-street charging remains an important enabler for the transition to zero-emission mobility, particularly for residents and user groups without access to off-street parking. Local transport authorities face common constraints such as limited kerbspace, accessibility, grid capacity constraints, and the governance and the staff resourcing required for parking management and enforcement.

2.2 This study builds on TfSE's EV Charging Infrastructure work programme and follows earlier engagement with LTAs that identified shared barriers to deploying and operating on-street charging. There was a clear need for a consistent regional evidence base and practical guidance on both "what works where" for on-street charging and the role of emerging and alternative solutions currently being deployed.

3. Study overview and outputs

3.1 TfSE commissioned Steer, through TfSE's technical call-off framework, to deliver the study. The work was completed in March 2026 and comprised of two parts:

- Part One – Baseline understanding: Mapping and analysis of current on-street charging provision, governance frameworks and delivery models, and the key implementation and operational challenges affecting deployment and management.
- Part Two - Emerging and alternative solutions: Assessment of developing technologies and complementary approaches that could offset or reduce demand for dedicated on-street residential charging.

3.2 The study was structured to move from a clear baseline understanding of on-street provision and delivery challenges, through to a practical assessment of emerging solutions and next steps for local piloting. It delivered:

- **An On-Street Charging Typology Matrix.** This brought together the main on-street hardware and layout approaches used or being trialled, including kerbside chargers, lamppost conversions, cross pavement solutions and micro hubs. It compared their practical characteristics, such as installation requirements, likely costs, operational issues and user accessibility. It also set out where each approach is most suitable across different urban forms and user groups, for example terraced streets, suburban streets and higher density areas.

- **An LTA survey dataset and thematic analysis, supported by follow up interviews.** This captured the current position across the TfSE area, including what is already installed, what is planned, and how delivery is being approached. It gathered evidence on policy readiness and governance, procurement and delivery models, and the barriers LTAs are seeing in practice. These included TRO processes, accessibility requirements, enforcement capacity and grid constraints. Follow up interviews were undertaken to add depth on what is working well, where capacity is constrained, and what support would be most useful.

- **A deep dive on roll-out and operational challenges.** This focused on the practical realities of delivering and managing EV only bays and on-street assets. It considered what is needed to introduce and operate charging bays successfully, including governance arrangements, TRO development, signage and lining, enforcement approaches and the role of monitoring systems. It also explored wider impacts on kerb space, pedestrian movement and the local street environment.

- **An assessment of emerging and complementary solutions**. This explored options that enable charging access in different ways, including shared domestic peer to peer models, shared depot and workplace charging, commercial hubs and park and charge concepts. It considered

feasibility and equity, and highlighted practical considerations such as liability, insurance, payment systems, data, and how well different approaches fit within current policy and regulatory frameworks.

- **A Future Options Playbook.** This translated the evidence into practical guidance that LTAs can use, including indicative delivery and commercial models, the prerequisites for success, and suggested next steps for piloting and integration into local strategies and programmes.

4. Key messages and application across the TfSE area

4.1 A copy of the On-Street Charging Emerging Solutions Study report is included in Appendix 1, alongside the Future Options Playbook. The supporting materials produced through the study, including the typology matrix and the LTA survey and thematic analysis, will be made available to local transport authorities via TfSE's Centre of Excellence platform. TfSE will further use the findings to inform its wider EVCI work programme and will consider whether elements of the approach could be shared more widely across the STB network, subject to resourcing and any future DfT funding opportunities.

4.2 The study identified that there is no single "best option" for on-street charging solutions. Successful deployment typically depends on local context (street type, parking regime, footway constraints, user needs and network capacity). The typology matrix and case study material are intended to support LTAs in selecting appropriate interventions and anticipating governance and operational requirements early.

5. Next steps

5.1 TfSE will disseminate the outputs to LTAs across the region and use established working groups to support knowledge transfer. This will include targeted briefings and the provision of the Playbook to support local policy development, procurement discussions and scheme design.

5.2 TfSE will take this work forward through a Phase 2 study to be undertaken as part of the 2026/27 work programme. This follow-on study with a small number of local authorities, helping them apply the toolkit in practice to identify the most suitable approaches for their area, understand any barriers to delivery, and agree clear next steps for local rollout. This Phase 2 study will also capture practical lessons and develop simple supporting materials so that learning can be shared more widely across the South East.

5.3 TfSE will also use learning from the study to inform its wider EV Charging Infrastructure work programme, including identifying opportunities for regional consistency (for example, on cross-pavement policy approaches, accessibility considerations and enforcement practices) and where further work or joint engagement with delivery partners may be beneficial.

6. Financial considerations

6.1 The total cost of TfSE's on-street charging solutions study was £74,850. These costs are being met form the DfT grant funding awarded to TfSE for 2025/26.

7. Conclusions and recommendation

7.1 TfSE's On-Street Charging Study into emerging solutions has provided a strengthened regional evidence base and practical guidance to support more accessible, equitable and cost-effective delivery of on-street EV charging. The outputs will help LTAs to make better informed decisions on charging typologies and to consider complementary solutions that can reduce pressure on constrained streets. TfSE will build on this work through a Phase 2 study that will support a small number of local authorities to apply the toolkit in practice and identify appropriate delivery approaches. The study will also capture lessons learned and develop supporting materials to help share good practice across the South East. The Partnership Board are recommended to note the contents of the study report.

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Report
March 2026

On-Street Charging - Emerging Solutions



Transport for the South East
24559706

steer

Report
March 2026

On-Street Charging - Emerging Solutions

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D	**On-street charging: Readiness pathways**

Acknowledgements

We would like to thank the following people for giving their time to this project:

Representative	Organisation	Category
Keith Kelly	**AppyWay**	D-TRO/DKM solution provider
Shayne Rees	**Char.gy**	On-street charger CPO
Matt Croucher	**Believ**	On-street charger CPO
David Bagwell	**Believe/BPA EV Connect Chair**	CPO & Parking body/association
Joel Teague	**Co-Charger**	Shared domestic charging platform provider
Sam Clarke	**Gridserve**	Rapid charger CPO
Toby Hiles	**Grid Smart Cities**	Bookable kerbspace platform
Niall Riddell, Jeremy Woolley	**Paua**	Fleet and shared depot platform provider
Sara Sloman	**Paythru**	Payment solution provider
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- Isle of Wight Council

Executive Summary

Overview

As EV adoption increases and the off-street charge point rollout continues at pace, households without off-street parking face persistent barriers to affordable charging reinforcing a “charging divide” between driveway and non-driveway households.

In response to this growing challenge, Transport for the South East (TfSE) commissioned this study to strengthen the evidence base and provide a practical toolkit to help Local Transport Authorities (LTAs) plan, prioritise, and deliver equitable, efficient, and future-proof public charging infrastructure for households and businesses without off-street parking**.** The report is structured in two parts.

- **Part 1** establishes the current on-street and cross-pavement charging landscape across the TfSE area, including what is being deployed, under which delivery models, and with what operational, social, and spatial implications.
- **Part 2** examines emerging and complementary solutions that are being deployed to reduce pressure on the kerbside space, including digital TRO-enabled dynamic kerbside management, shared domestic charging and shared depot charging, alongside other partnership-led approaches.

What this study has done

The work builds on TfSE’s May 2025 EV Programme Discovery Project and translates the discovery themes into tools and insights designed to support the delivery of on-street charging infrastructure.

It combines quantitative analysis of EV uptake and charging provision with the findings from an LTA survey and follow-up interviews designed to capture the requisite delivery conditions, including procurement and governance arrangements, policy status on cross-pavement charging, enforcement approaches, and how provision is (or is not) being tailored to different user segments.

This is complemented by targeted stakeholder engagement with six charge point operators offering a range of hardware solutions, two accessibility organisations, a digital TRO and kerbside management provider, and fleet and payments platforms, ensuring that conclusions reflect both local authority realities and market delivery constraints.

Alongside this baseline, the report develops an on-street charging typology and associated decision-making framework, linking hardware types and installation layouts to the environments in which they are most likely to be effective. A strategic taxonomy is also introduced to describe how authorities are approaching rollout in practice, recognising how delivery approaches are shaped by ambition, political context, kerbside pressure, asset ownership, and organisational capacity.

Summary findings

Delivery performance is primarily constrained by governance and kerbside management rather than charger technology. Across the TfSE area, rollout is shaped by funding sequencing, internal capacity, TRO processes, enforcement capability, grid connections and maintenance demands, with kerbside competition and parking sensitivity consistently influencing what is politically and operationally feasible.

Delivery approaches that respond to these issues are maturing, although progress remains uneven. Many authorities are scaling up lower-power residential provision such as lamppost chargers, while others avoid certain solutions due to streetscape, accessibility, or long-term ownership and maintenance considerations.

The selection of charging hardware is also informed by several other factors including user types and charging use cases, street heritage/aesthetic considerations, and accessibility needs.

Environment	User type			
	LCV	Disabled user	Car	Taxi/PHV
On-street urban centre	**Ultra-fast charging** + *minimal kerb impact* + *high utilisation*	**Guaranteed accessibility** + **reliability** + **clear, protected space**	**Convenience** + *turnover* + *kerbside efficiency*	**Ultra-fast charging** + **predictability** + **queue avoidance**
On-street urban residential	**Predictable access** + **longer dwell** + *residential compatibility*	**Guaranteed accessibility** + **certainty of access** + *wider residential compatibility*	**Long-dwell compatibility** + **cost effectiveness** + *equitable access* + *scalable deployment*	**Predictable access** + *controlled residential impact*
On-street suburban residential	**High reliability** + **overnight energy sufficiency** + *low-density compatibility*	**Guaranteed accessibility** + **maximum reliability** + **proximity to home**	**Reliable coverage** + **cost effectiveness**	**High reliability** + **overnight energy sufficiency** + *cost-proportionate provision*

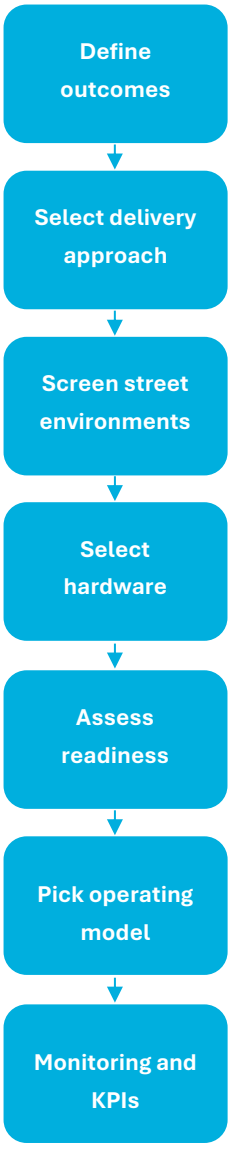
Accessibility for those with mobility impairments is also not resolved through compliance alone. Usability depends on siting, bay geometry, cable handling, and reliability, with predictable access especially important for disabled motorists.

In practice, no single approach will meet all strategic ambitions for on-street charging. The emerging solutions explored in the second part of this report can help to relieve pressure on the kerb, but only where enabling conditions are in place.

Dynamic kerbside management is cited as a solution which can improve reliability and utilisation where TRO data is digitised and enforcement is integrated, particularly in mixed-use and commercially pressured areas. Other emerging solutions such as shared domestic and shared depot charging can reduce pressure on the kerb, but scale is constrained by liability clarity, operational culture, security, billing, and data-sharing complexity.

Next steps and how the toolkit is intended to be used

The toolkit is intended to be used as a structured decision pathway that helps LTAs translate strategic intent into deliverable, defensible choices on the ground.



It begins by defining which outcomes are being prioritised in the next phase of rollout (typically balancing equity, pace, acceptability, utilisation, and public realm/accessibility considerations). Making these trade-offs explicit reduces policy drift and strengthens the basis for consultation and site selection.

The taxonomy of authority approaches then supports selection of an appropriate delivery approach by place type, recognising that different contexts require different levels of kerbside control and different levels of delivery ambition. Alongside this, the charger typology framework supports matching infrastructure to the combined needs of user groups and street environments, so that decisions on power level and hardware type are grounded in how streets and users behave in practice, not simply what is easiest to install.

A key element of the appropriate route to delivery is readiness: before selecting interventions that depend on compliance (such as designated bays), the toolkit directs authorities to assess TRO maturity, kerbside data quality, and enforcement capacity, and to choose approaches that can be delivered credibly within those constraints while setting out enabling steps to progress over time.

In practical terms, the next steps for LTAs are to apply the toolkit to refine near-term rollout pipelines by place type, identify targeted pilots where DKM or shared charging can address acute constraints, and strengthen accessibility expectations within procurement and operational monitoring.

For TfSE, the next steps centre on facilitating shared learning and harmonisation across authorities, supporting more consistent approaches to digital TRO maturity and kerbside data quality, and prioritising where regional support and further piloting will have the greatest impact.

1 Introduction

1.1 Background

As EV adoption increases and the off-street charge point rollout continues at pace, households without off-street parking face persistent barriers to affordable charging reinforcing a “charging divide” between driveway and non-driveway households.

In response to this growing challenge, Transport for the South East (TfSE) has commissioned this study to build an evidence base and a practical set of tools to help local transport authorities (LTAs) plan, prioritise, and deliver equitable, efficient, and futureproof public charging infrastructure for households and businesses without off-street parking.

This report is structured in two sections:

- **Part one** develops a baseline picture of current on-street and cross pavement charging: what is being deployed, where, under which ownership and delivery models, and with what operational, social, and spatial implications.
- **Part two** examines emerging and complementary solutions that can reduce pressure on the kerb such as shared domestic charging, shared depot/workplace access, and commercial hub models.

This study builds on previous discovery work (summarised below) to provide an evidence-led approach to delivering the future of on-street electric vehicle (EV) charging. The approach combines literature and data reviews with LTA surveys and interviews, targeted stakeholder engagement (including accessibility groups, charge point operators (CPOs), Distribution Network Operators (DNOs) and enforcement teams), and representative case studies. This ensures that recommendations are credible, scalable, and sensitive to local context, while remaining grounded in the practical realities faced by local authorities.

1.2 Summary of previous work (EV Discovery Project)

In May 2025, TfSE and Steer completed the EV Programme Discovery Project to establish a regional baseline and codesign the next phase of support with LTAs. The work combined quantitative analysis of EV adoption and EV charging infrastructure (EVCI) rollout with structured interviews across TfSE’s constituent LTAs, exploring what has worked well and what is holding programmes back.

The Discovery Project identified seven themes:

1. **Maturing public sector delivery practice:** Local authorities are moving from ad-hoc pilots to more standardised, end-to-end delivery approaches, but many are still constrained by changing guidance, approval requirements, and coordination challenges.

2. **Securing and sequencing public funding:** Public funding (particularly Local Electric Vehicle Infrastructure (LEVI) funding) is essential, but can be slow to access and hard to align with local governance and procurement timelines, which can stall schemes that are otherwise ready to deploy.
3. **Enabling private investment consistent with procurement rules:** Authorities are seeking to structure propositions that remain compliant with procurement and grant terms while still offering CPOs routes to return on investment and protections against early termination risk.
4. **Equity across socio demographics and geographies:** Charging rollout needs to address uneven access to charging at home, differing affordability constraints, and practical delivery barriers in high-density and lower-affluence areas, so benefits are not concentrated in already-advantaged places.
5. **Electrification of commercial vehicles:** Van and fleet electrification lags that of cars and is held back by confidence and charging availability, requiring more proactive demand assessments and engagement with operators to unlock viable depot and en-route solutions.
6. **Electrification of authority fleets:** Councils need coordinated plans across property, fleet, HR, and finance to convert vehicles and depots (including energy procurement and site reconfiguration), rather than treating fleet as a separate workstream.
7. **Capacity, skills and resourcing:** Delivery is repeatedly limited by internal capacity (e.g., procurement, legal, GIS, project management) and external dependencies (CPOs, DNOs, maintenance), making capability funding and shared support models particularly important.

The Discovery Project set out recommendations for TfSE's role as a regional facilitator, which provide the direction that this study now contributes to, translating shared challenges into a pipeline of evidence-led tools, frameworks, and playbooks that LTAs can adopt and refine.

2 Current charging landscape

2.1 Current challenges

Background

Evidence from TfSE's 2025 EV Programme Discovery Project highlights a set of barriers that shape the pace and quality of rollout across the South East:

- LEVI funding cycles and approval processes, late or changing guidance, and election related timing effects have introduced uncertainty and delay.
- Authorities report resource constraints, complex procurements, and market saturation among operators. In this context, maintaining affordability while ensuring commercial viability can be challenging, especially where charging provision is delivered ahead of demand.
- Accessibility of bays, the needs of residents without driveways, and confidence among new users (including commercial drivers) require careful, ongoing engagement.
- DNO connection delays, maintenance backlogs, and the variability of local EV adoption patterns complicate delivery.
- Uncertainties around cross-pavement solutions, liability, and landlord permissions for installations (particularly in leasehold settings) continue to slow progress.

The data from the study highlights these pressures and the diversity of starting points across the region. As of Q2 2024, around 5.5% of cars and vans in the TfSE area were electric (vs 4.6% UK wide), with an average of 28 EVs per public charger (vs 30 nationally). However, the data also indicates significant variation between LTAs when measured by EV/charger ratios and by estimated public network power relative to AFIR style benchmarks.

These differences reflect contrasting levels of off-street parking and uneven availability of workplace charging, both of which influence the quantity and type of public provision required.

The rollout and operation of on-street EV charging is shaped by governance and the day-to-day operational realities of activity at the kerbside. Local authorities must navigate a variety of statutory processes, competing kerbside demands, enforcement considerations, and partnership arrangements, often with limited internal capacity and within constrained spaces.

These challenges are compounded by the need to balance flexibility for users with clarity on enforcement, accessibility, and public acceptability, particularly as charging infrastructure becomes more widely available and more intensively used.

Cross-pavement charging barriers and the emerging 'charging divide'

Recent national survey evidence from EVA England[1] highlights how households without driveways continue to face substantial barriers to accessing affordable domestic charging. Although a large majority of respondents in recent surveys report that a cross-pavement solution could work for their property, very few have been able to install one in practice.

High planning costs, lengthy approval processes, inconsistent council responses, and uncertainty over local policy are repeatedly cited as deterrents. In some cases, the planning process adds several hundred pounds to installation costs, on top of upfront expenditure that can already exceed £3,000, creating a financial hurdle that particularly affects lower income households.

Users also report inconsistent and sometimes contradictory messaging from local authorities. Some councils have expressed concerns about safety risks from engineered cross-pavement systems, while simultaneously tolerating temporary armoured mat arrangements that many respondents perceive as less safe and more obstructive for pedestrians. Where cross-pavement solutions have been installed, user feedback is highly positive: survey respondents cite improved safety, ease of use, and significantly reduced charging costs, particularly when combined with solar generation or off-peak tariffs.

These findings underline the need for clearer national guidance, streamlined local processes, and more consistent policy positions on cross-pavement solutions to ensure that on-street households are not left behind in the transition to electric vehicles.

2.1.1 Local authority perspectives on on-street charging

Local transport authority survey and interviews

To gather additional perspectives and greater insight into the TfSE region specifically, an LTA survey and a series of follow-up interviews were undertaken as part of this study.

The survey was designed to build a consistent picture of what infrastructure is already in place and what is planned, the policy and operational context shaping delivery, and the practical challenges authorities are encountering as the provision of on-street charging infrastructure increases.

It also captured where authorities are testing newer approaches, including cross-pavement solutions and dynamic kerbside management (DKM), and how provision is being tailored to different user groups.

The survey covered four main areas, it:

- **Mapped the current and planned mix of on-street charging hardware** (from lamppost and bollard/post-mounted solutions through to pop-up/flat-and-flush chargers), alongside enabling cross-pavement measures such as armoured mats and cable gullies.
- **Recorded the status of local policies on cross-pavement charging** (e.g., banned, permitted under licence, pilot, or awaiting internal decision), reflecting

[1] **https://www.transportxtra.com/publications/local-transport-today/news/80093/drivers-urge-government-to-act-on-charg?etid=7446531&artid=80093**

the fact that policy clarity is often a key determinant of delivery pace and user confidence.

- **Identified the most common barriers to rollout, operations, and management** (including planning permission, TROs and parking management, accessibility, enforcement, grid capacity, procurement, contract management, and ongoing costs), and invited authorities to describe the solutions and workarounds they have adopted.
- **Explored the extent of charging offer differentiation by user segment** (for example, residents without driveways, taxis and private hire, light commercial vehicles, public sector fleets, and disabled users), and whether DKM techniques have been used to manage availability, reduce conflict with other kerbside uses, and improve utilisation of existing infrastructure.

The survey was sent out to all local authorities, of which 10 responded. Following the survey, a targeted selection of deep-dive interviews were conducted with four LTAs including both county and unitary councils from across the area to capture the nuances behind the headline findings from the previous data collected. A wide variety of place types were targeted to ensure coverage across urban and rural contexts, high and low EV uptake, and across areas representing a range of political constituencies.

NB: *Due to limited responses from the LTAs across the region, qualitative analysis of the responses across the two research methods has been compiled in the section below, with available data used to validate observations that were consistent with interview findings.*

Current provision and preferred hardware types

Across interviews and survey responses, the strongest delivery approach currently being deployed is to deliver lower-power residential on-street charging. This is often chosen due to the ease of reusing existing highway assets and delivering at scale with relatively repeatable design and approval processes. One local authority described a programme trajectory of c. 7,000 units over six years, with the large majority expected to be lamppost or supplementary post solutions, reflecting both LEVI's residential emphasis and a "use existing assets" logic.

Where councils are segmenting their procurement approach, it tends to be through contracts organised by power band. One authority referenced a three-lot structure: up to 8 kW (lamppost), 8–50 kW, and 50+ kW, with mid/high-power solutions largely expected to be standalone units (lower volume than lamppost, but still at material scale).

By contrast, some authorities are deliberately avoiding lamppost charging, driven by a mix of physical siting constraints (e.g., columns at the rear of footways) and associated accessibility concerns, and long-term liabilities. In one case, the decision not to pursue lampposts was linked to the prevalence of back-of-pavement columns and a desire for socket height/accessibility outcomes that felt more straightforward with other street furniture forms, alongside concerns about ownership and maintenance interfaces over time.

Heritage and streetscape constraints are consistently highlighted as a practical challenge. It was noted that many heritage assets (lampposts) are not suitable for direct EV charge point attachment, and other locations are precluded where columns are

distant from the kerb or separated by verges. Some workarounds noted include feeding supplementary posts from such assets where possible.

Cross-pavement solutions

Policy maturity on cross-pavement solutions is mixed and often cautious. Cross-pavement gullies were often described as having "a place" but were frequently positioned as secondary to public charging infrastructure provision. They are seen as more of a fallback option where public provision is not viable (commercially or physically), In many cases, local authorities indicated that policy frameworks for these solutions are still under development, with the expectation that any formal policy adoption would require Cabinet approval.

In many cases, cross-pavement cable management is shaped by risk concerns such as the likelihood of trip hazards and the unpredictability of where vehicles will actually park relative to a gully, with some LAs explicitly wary of the behavioural assumptions required for safe use.

At the same time, other LAs had implemented a more operationally detailed route to approvals via a managed/licensed model: a supplier-supported approach including pre-assessment, photographic plans, and ongoing administration through a resident register, with an indicative resident fee (c. £60/year after two years) covering maintenance/insurance and reducing the LA's ongoing administrative burden.

It was not uncommon for other LAs to describe being pushed by lobbying from residents and elected members, as well as broader pressure to demonstrate a comprehensive residential charging offer in the context of LEVI funding bids. However, many wanted to avoid committing before understanding risk/standards implications. In this case, many LAs were seeking more formal guidance or route maps to follow to add weight to their policy decisions, and to provide a ready-made formal response that could be used in the event of public or political pushback.

Governance, approvals, and TRO processes

Interviewees repeatedly framed roll-out of EVCI as a process design challenge as much as a technology challenge, particularly where approvals require the involvement of multiple teams (highways, parking, legal, communications, etc). One LA described building an end-to-end pipeline that takes candidate LEVI locations through approvals and consultation, including a dedicated TRO consultation route where responses are reviewed before installations progress.

A recurring governance nuance is the interface between highways authority responsibilities and district/borough roles, especially for parking enforcement and, in some cases, taxi licensing decisions influencing where certain chargers are best located.

Parking controls and enforcement regimes

On-street parking is consistently described by LAs as the most sensitive constraint, and one that shapes both their appetite to introduce TROs and the type of restrictions councils are prepared to apply. In high street contexts, earlier LEP-funded schemes used TROs with time-limited EV-only parking during daytime (often aligning with existing high street controls), while allowing any vehicle to park overnight. This effectively treated restriction as a time-of-day tool rather than a blanket designation.

However, in residential areas, some interviewees described a shift away from routinely applying TROs to newer EVCI deployments, reflecting the transaction cost of TROs versus the desire for pace and scale of delivery.

The political sensitivity around removing or redesignating parking should not be understated. Attempts to introduce dedicated EV bays in one location received very significant opposition which created political challenges, leading to a more incremental approach, of trialling dedicated bays in a subset of locations first to build the utilisation case before expanding. It was noted in discussions that this may be a transitional challenge which subsides as EV adoption accelerates, and as an increasing share of residents view on-street charging as something they might need or benefit from.

In managing this, some LAs highlighted favouring practical design choices that deliberately avoid creating "exclusive" bays around lamppost chargers. This included opting for installing charging with no TROs and no bay markings, with only small signage on the column. Adopting this approach avoids inadvertently reserving multiple adjacent spaces around a single lamppost.

A further enforcement issue is that charging can inadvertently interfere with existing controlled parking systems. One LA described complexities where introducing a TRO linked to a charging asset necessitates the removal of underlying parking controls. One solution was the introduction of app-based fees equivalent to parking charges, however there is still uncertainty about how this sits alongside charge point regulatory expectations.

Integration of systems for monitoring compliance

Authorities are moving (at different speeds) towards integrated digital toolchains that link parking controls, TRO status, consultation feedback, and charging roll-out plans. Some local authorities reported having their whole area mapped in a digital TRO (D-TRO) platform and actively working to bring restrictions data into a charging-focused tool (Chargepoint Navigator) so teams can view constraints in one place when assessing candidate sites.

Others also described parallel consultation channels including one public "pin drop" platform for suggested charger locations, and a TRO consultation site for statutory feedback. Together, the two platforms created an evidence base for both demand mapping and risk/objection management.

Where external administrative models are used, LAs emphasise still needing asset database cross-checks between lamp columns, cable gullies, and other on-street charge points to manage electrical safety/proximity ("sim touch") and future scheme planning.

Capacity constraints and delivery challenges

Resource capacity constraints were common across respondents, but they present differently by authority and their chosen approach:

- **Legal/wayleave style constraints on lighting assets**: One LA described a conservative legal interpretation requiring Section 115-type consent where lamp columns are within the pavement, creating a practical bias towards installing in verges to avoid frontage consent.

- **PFI street lighting contracts**: Another noted PFI arrangements can add change-control friction, but also create efficiencies where the PFI operator can undertake fitment directly (reducing surveys and interfaces).
- **Heritage/conservation considerations**: Multiple LAs flagged the need to screen for heritage/conservation constraints during site selection, also describing practical workarounds for heritage lighting assets.
- **Accessibility and inclusive design**: Balancing charging provision with inclusivity can occasionally be a challenge, as evidenced in a real-world case where a cable gully and charge point served a Motability-supported resident adjacent to an advisory disabled bay. This highlighted that the broader challenge is not only equipment specification, but also the location of the charge points relative to needs linked to accessible movement and use.

Partnership models with CPOs

The interviews show a general shift towards more structured commercial arrangements. These are often concession-like in practice, even where delivery models vary. Section 3.5.3 explores governance and partnership models in more detail. Examples of different types of models discussed in this research include:

Table 2.1 : Comparison of the different models

Model	Capital Risk	Revenue Risk	Control for LA	Common for on-street
Public Ownership	High (public)	High (public)	Very high	Limited
Concession / Revenue-Sharing	Low (private)	Low (private)	Medium	Very common
Anchor-Tenant / Co-investment	Low	Low	Low	Common
Hybrid / Innovation Partnership	Shared	Shared	Medium	Very common
Community / Cooperative	Shared	Shared	Medium	Emerging

Insights by user segment

Residents without off-street parking remain the priority segment for LEVI-driven programmes, with many councils focusing primarily on walk-to-charger coverage and overnight charging suitability. Some local authorities explicitly articulated an ambition to bring a large share of homes without off-street parking within a short walk of charging, framed within a broader decarbonisation strategy.

However, interviews also highlighted several secondary segments that matter in design and messaging:

- **Households with driveways (but still needing public charging sometimes)**: Some LAs described preparing policy logic for why a network approach still

benefits households with off-street parking (e.g., those with short-term leases, constrained domestic electrics, visitors).

- **Fleet and commercial use cases**: One council referenced additional Trojan Home[2] style units, including a tranche aimed at commercial vehicles, positioning this as a practical response to fleet needs. One use case example of a local plumber who relied on on-street charging similarly reflects a view that visitors/trades should not be assumed able to use private drive or depot chargers.
- **Taxis**: Another LA described dedicated taxi charging provision across ranks, town centres, and car parks, shaped by coordination with licensing authorities.
- **Disabled users**: The Motability-linked example suggests both latent demand and the potential value of targeted partnership/communications with disability stakeholders. However, it also highlighted that accessibility is as much about siting and kerbside context as it is about charger specification.

Impacts on non-users and the wider kerbside system

Non-user impacts emerge most strongly through parking displacement, perceptions of fairness, and footway incursion risk. Many respondents characterised parking as highly emotive and increasingly safety-critical in some residential contexts. Frequently mentioned were “parking wars” style behaviours and a strong sensitivity to the perceived loss of even a single space. Many LAs report that the political acceptability of dedicating bays can be low in high-pressure areas, even when charging infrastructure (e.g. lamppost chargers) already exists.

Authorities are also pre-emptively trying to avoid future conflict through siting rules. A common approach is to avoid placements directly outside property frontages, partly to reduce negative consultation feedback, and also to avoid constraining potential future Blue Badge provision.

2.1.2 Challenges for commercial vehicle use of public charging

Public charging is increasingly necessary for many commercial fleets (such as delivery vehicles and vans used by tradespeople) as the push for electrification continues, especially for take-home vehicles without access to off-street parking/charging and those without depot charger access. However, it is more expensive, less reliable, and raises security concerns (e.g., vandalism, tool theft, cable theft).

Operational concerns

Charging on street (as opposed to in a depot) was also associated with security concerns. High-value equipment and vehicles are targets for theft and vandalism, especially when parked on-street overnight at home. Interviewees also told us that (council) branded vehicles are targeted even when there are no valuables on board and there is clear signage to indicate this. Common security measures include slam locks and keeping vehicles in depots or at home where possible.

[2] Trojan Energy entered administration in February 2026, and its business and assets were subsequently acquired in a pre-pack sale by Urban EV Infrastructure Limited, a subsidiary of Connected Kerb Limited.

There are also concerns over operational efficiency. If it is not practicable to charge vehicles at a worker's home, fleet managers engaged as part of this research prefer depot charging in part because vehicles can be charged while not otherwise in use, whereas on-street charging often happens during the working day, disrupting operations.

Public perceptions

In order to fully electrify their fleets, many organisations will need to rely on public charging. Yet, stakeholders noted that there is a common perception from members of the public that commercial drivers should not be using public EV infrastructure as there is an assumption that such vehicles can charge at their depot, sometimes this can result in confrontation.

Drivers of LCVs want to avoid verbal abuse, and companies want to avoid any reputational issues. Campaigns to make it clear that public charging infrastructure is open to all users would help to reduce or remove this psychological and potential reputational barrier.

Other challenges

On-street rapid charging is generally seen as impractical for LCVs due to bay size (e.g. long wheelbase vehicles), congestion, and operational disruption, with loading bays in busy urban areas in near-constant use throughout the day. Most stakeholders do not favour rapid charging in loading bays for these reasons, and they generally aim to minimise the time they spend occupying them.

Ultimately, on-street public charging is largely viewed as a necessary but problematic solution by commercial fleet managers, with particular concerns over cost, security, and operational efficiency. Consequently, commercial fleets are currently reluctant to use public charging except as a last resort, but this is likely to be the only option for many sole traders.

2.2 Accessibility considerations

2.2.1 Context and why this matters

On-street EV charging is regarded as essential by many households without off-street parking, but stakeholder engagement indicates it remains materially harder to deliver in an accessible way than off-street or destination provision. This is largely because on-street infrastructure must be retrofitted into constrained, often already sub-optimal streetscapes where gradients, narrow footways, street furniture, drainage features, parking pressure, and traffic exposure all limit what can be achieved.

Stakeholders also cautioned against treating accessibility as a hardware compliance exercise, as installations may meet individual PAS 1899 requirements (such as reach ranges or socket heights), yet still be unusable because the overall user journey and surrounding space have not been designed holistically.

2.2.2 Streetscape constraints and level access

In on-street contexts, spatial constraints and level access are repeatedly identified as challenges. Many locations struggle to provide level access within tolerances, sufficient manoeuvring space for wheelchair users, and bays that are long and wide enough to accommodate wheelchair accessible vehicles (WAVs).

Passengers are also highlighted as a gap in current accessibility thinking. The disabled person is not always the driver, and passengers' needs are often not considered when designing charging layouts and requirements. Many Blue Badge holders do not drive and may be passengers with a wide range of needs (including visual impairments or neurodiverse conditions), so accessibility should be framed around the whole trip experience, rather than the driver alone.

Engagement with disability charities also highlights how disabled occupants may need rear-entry or side-transfer space (e.g. WAV users), which affects how a vehicle must be positioned relative to the charge point and therefore the bay layout needed for charging to be usable in practice.

Build-outs can help create space and keep cables closer to the kerb, but poorly designed buildouts (for example, those that are stepped, disconnected from dropped kerbs, or difficult to mount from a wheelchair) can create new barriers. This aligns with previous research undertaken by Steer that concerns over "bay dimensions" are among the metrics where on- and off-street accessibility diverges most significantly.

2.2.3 Cable handling, force requirements, and non-user impacts

Cable handling remains one of the most consistent barriers for disabled motorists, particularly where higher-powered units use heavy, stiff cables without assisted cable management. Stakeholders highlighted that the force required to pull, position, and connect rapid charging cables can be prohibitive for some users, especially from a wheelchair and in poor weather. In this sense, the lower-power charge points often installed in on-street contexts may be more accessible to users, but only where the wider bay features can accommodate access.

Cable management issues can also impact non-users. Where cables cross or encroach on the footway, they can become trip hazards for pedestrians, particularly in dense residential streets where cross-pavement solutions are more common.

2.2.4 Reliability, information, and booking as accessibility enablers

Disabled motorists are more likely to plan journeys in advance due to historic negative experiences, and reliability issues (out-of-service units, vandalism, damage, poor maintenance) amplify anxiety and reduce confidence. Disabled Motoring UK were strongly supportive of bookable charging and clearer, more accessible digital information, including the ability to identify whether a charge point is accessible before travelling and to pay via an app to avoid difficult on-unit payment interfaces.

This aligns with the broader direction of travel towards dynamic kerbside management, where digitally enabled allocation and enforcement can improve predictability in high-pressure and contested locations. Further detail on this approach is outlined in Section 3.2.

2.2.5 Recommendations

The implication from engagement with a wide range of stakeholders tackling different aspects of charge point delivery is that inclusive on-street charging requires an integrated approach which considers all aspects of design, procurement, operations, and data.

The summary recommendations are therefore to:

1. Embed accessibility expectations in procurement and delivery (including accessible heights, orientation rules and cable management expectations for rapid units)
2. Improve data transparency so users can filter charge points by accessibility features (supported by current site photographs)
3. Expand and repeat charge point auditing to track progress and keep datasets relevant as standards evolve.

Where retrospective improvements are feasible, quick wins include:

- Clearer signage indicating where charge points are
- Prominently displayed instructions in accessible formats, and addressing avoidable “installation errors” such as poor orientation or excessive set-back from the kerb.

2.2.6 Emerging solutions to improve accessibility over time

Looking ahead beyond existing practice, stakeholders identified several emerging solutions that could materially improve accessibility outcomes. Wireless charging was consistently framed as the most inherently inclusive option because it removes cable handling altogether, albeit with current cost, technology and deployment constraints.

In the nearer term, bookable kerbside space and demand-led provision (for example, aligning Blue Badge bay allocation with adjacent charge points) could reduce anxiety and help ensure that at least a proportion of installations in any area are genuinely usable. Peer-to-peer domestic charging models (covered in Section 3.3) were also seen as a potentially helpful complement, particularly where trust can be strengthened through community-based schemes.

2.3 Local authority delivery approaches

2.3.1 Overview

Rather than following a single approach, local authorities across the region are adopting distinct approaches in how they approach on-street EV charging. In practice, these are shaped less by overall ambition and more by local political context, kerbside pressure, asset ownership, and internal capacity.

Importantly, most authorities do not sit neatly in one category across all themes. An authority may, for example, be highly mature in procurement and delivery, but cautious in kerbside controls or cross-pavement policy.

To address these conflicting pressures, this section sets out a taxonomy of approaches against which local authorities can judge their desired outcomes and their resulting approach across the different aspects of delivering on-street charging.

Cautious, low-conflict rollout

Some authorities are prioritising pace and political acceptability over prescriptive kerbside management. In this approach, on-street charging is delivered with a deliberately light footprint, often avoiding dedicated EV bays, extensive signage, or TROs

unless absolutely necessary. The intention behind this approach is to minimise confrontation over parking loss and reduce the risk of schemes becoming stalled by objection or escalation.

This approach is commonly associated with:

- Lamppost or discrete supplementary post solutions.
- Minimal or no changes to parking controls.
- Reliance on informal compliance rather than active enforcement.

Authorities adopting this approach often see it as a pragmatic response to high parking sensitivity or limited enforcement capacity. However, it can also constrain future flexibility, particularly if higher-power charging or greater turnover becomes necessary. Furthermore, where a more hands-off approach to residents' parking is adopted, local "parking wars" may emerge with no formal means of resolving them.

Table 2.2: Pros and cons of a cautious, low-conflict rollout approach

Pros	Cons
Faster deployment and lower up-front governance burden	Limited ability to manage turnover or prioritise users
Reduced political and community opposition	Risk of informal blocking and uneven availability, leading to conflict
Minimal reliance on enforcement capacity	Harder to retrofit controls as demand grows

This approach aligns best where the strategic ambition is to start building coverage quickly without triggering initial backlash, particularly in politically sensitive or parking-constrained areas.

Scaled residential network builders

A second group of authorities are approaching on-street charging as network infrastructure, with a clear ambition to achieve area-wide coverage for residents without off-street parking.

These authorities tend to articulate clear coverage metrics (e.g. walk-to-charger distances) and are more likely to invest in repeatable delivery models, multi-year pipelines, and structured procurement.

Key characteristics of this approach include:

- A strong focus on lower-power residential charging at scale.
- Structured contracts, often split by power band or use case.
- Increasing use of standardised designs and approval processes.

This approach can offer a more robust response to local challenges and opposition, enabling rollout to proceed in a way that is grounded in policy ambition. Clearly, this requires strong political backing and long-term commitment, which can be challenging in areas with higher levels of opposition and where EV uptake is still low.

Table 2.3: Pros and cons of a scaled, residential network builder approach

Pros	Cons
More equitable and consistent access across neighbourhoods	Higher exposure to consultation fatigue and objection risk
Better value for money through scale and standardisation	Greater reliance on internal capacity and cross-team coordination
Clearer long-term policy articulation, delivery pipeline, and market signal	Slower initial mobilisation where governance chains are complex

This approach aligns best where the ambition is area-wide equity and coverage, effectively treating on-street charging as local utility infrastructure.

Targeted, use-case-led deployers

Some authorities are focusing less on blanket residential coverage and more on specific user needs, such as taxis, fleets, disabled users, or town-centre charging. In these cases, on-street charging is framed as part of a broader transport or economic strategy rather than purely being a residential amenity.

This approach typically involves:

- Selective use of higher-power or dedicated infrastructure.
- Closer coordination with licensing authorities, fleet managers, or disability stakeholders.
- A higher likelihood of formalised parking controls or dedicated bays.

Table 2.4: Pros and cons of a targeted, use-case-led deployment approach

Pros	Cons
Higher utilisation and clear user benefit per installation	Greater political sensitivity if perceived as favouring certain groups
Strong alignment with wider policy objectives (e.g. fleet transition, accessibility)	Higher enforcement and management requirements
Easier to justify dedicated infrastructure for defined needs	Less “coverage benefit” for general residential demand

This approach aligns best where the ambition is to enable specific transitions (e.g., taxis, fleets, accessible users, town-centre turnover) and deliver high impact per site, even if coverage is less uniform.

2.3.2 Selecting an approach

In practice, no single approach will meet all strategic ambitions for on-street charging. The interviews and survey insights collected for this study suggest that the most resilient and effective strategies are those that deliberately combine approaches, selecting the one that best fits local conditions, delivery capacity, and political context.

This section therefore sets out a methodology for selecting the right approach for the right place and bringing this together into an overarching strategy.

1) Be explicit about what is being optimised for

Before selecting an approach, it is helpful to set out the primary objective(s) for the next phase of charge point delivery. In practice, most programmes optimise for a mix of:

- Equitable access for residents without off-street parking.
- Pace and public acceptability.
- High utilisation and clear outcomes for priority users and locations.
- Protection of the public realm and accessibility.

These objectives will vary dependent on the current mix of charging provision and maturity of delivery. Clarity on objectives at this stage reduces policy drift and helps justify trade-offs in public consultation and internal approvals.

2) Let kerbside conditions determine the level of control

Kerbside pressure and local sensitivity should determine how interventionist the strategy can be in different street types. In high-pressure streets, a lighter footprint may be the only viable starting point, whereas in locations where kerbside productivity/turnover or fairness is critical, stronger controls may be needed and justified. The key is to decide this up-front by context (place type and use case), rather than re-opening the restrictions debate for every site.

3) Align choices with enforcement and governance capacity

Where enforcement capability is limited or responsibilities are fragmented, strategies that depend on tight compliance and continual monitoring are not likely to be effective. Conversely, where enforcement is credible, there is greater scope to use parking controls to protect availability and manage dwell time. Similarly, where internal governance is slow due to limited resource, approaches that minimise repeated approvals and create a repeatable delivery pipeline are typically more resilient.

4) Differentiate by place and segment rather than adopting a uniform policy

A practical way to avoid overreach is to define a small number of “delivery contexts” (for example: residential streets, town centres/high streets, transport hubs, and fleet/taxi locations) and apply tailored design and management assumptions to each. This maintains consistency while still responding to local conditions.

5) Treat the approach as adaptive, not fixed

Finally, authorities should view their chosen approach as time-bound rather than permanent. Early low-conflict rollouts can evolve into more managed arrangements as demand grows and public understanding improves. Furthermore, initial targeted deployments can inform wider network expansion. Building in review points linked to utilisation, complaints, and operational performance allows strategies to mature without reopening fundamental policy debates.

2.4 On-street charging typology

2.4.1 Introduction

Having set out how local authorities can select an appropriate strategic approach based on ambition, kerbside context, and delivery capacity, the next step is to consider how that approach translates into physical infrastructure on the street.

In practice, the choice of approach is realised through decisions about charger hardware type, power level, and siting, each of which interacts differently with street layout, parking controls, accessibility requirements, and user behaviour. No single charger type performs well in all contexts. Instead, different solutions are better suited to particular place types and use cases, depending on the balance between coverage, turnover, visibility, and kerbside impact.

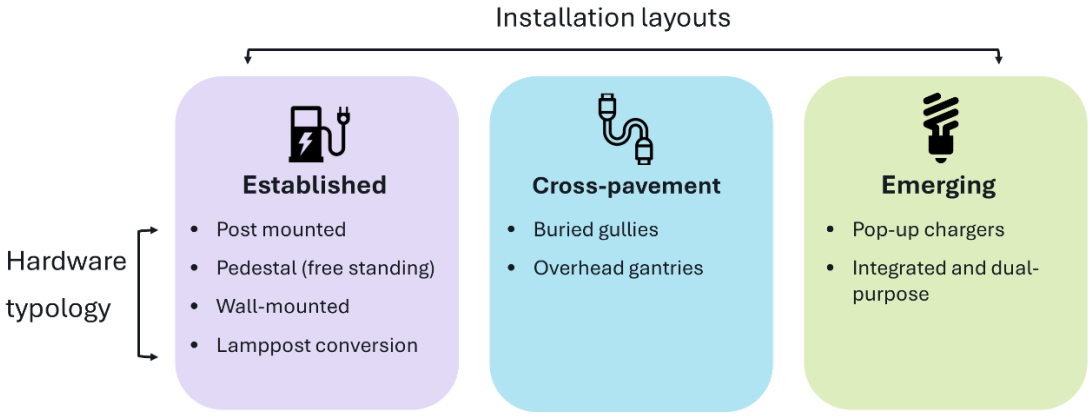
The on-street charging typology that follows therefore does not present a hierarchy of "better" or "worse" solutions. Rather, it provides a practical mapping between hardware types and the places they work best, drawing on the interview and survey insights to show how authorities are matching infrastructure to residential streets, town centres, destination sites, transport hubs, and specialist user needs.

This typology is intended to support place-based decision-making, helping authorities move from high-level strategic approaches to implementable, defensible choices on the ground.

2.4.2 Hardware types

As illustrated in Figure 2.1, three principal kerbside installation layouts are considered: established, cross-pavement, and emerging solutions.

Figure 2.1: On-street charger type by installation layout and hardware typology

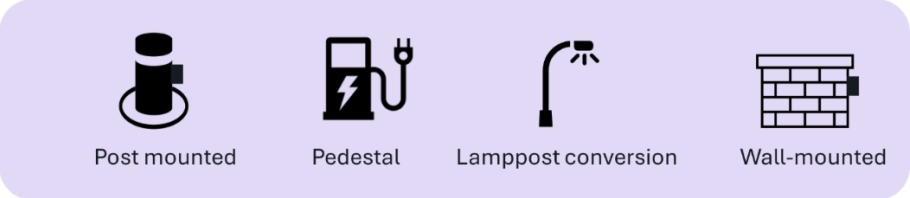


Each layout category contains several hardware typologies, reflecting different engineering approaches, design objectives, spatial footprints, and levels of interaction with the pedestrian environment. These differences influence accessibility, maintenance, installation cost, and the extent to which each charger integrates, or conflicts, with existing urban infrastructure.

Established

Four established kerbside hardware types are considered in this section: post mounted, pedestal, lamppost conversions and wall-mounted (Figure 2.2).

Figure 2.2: Hardware typologies of 'established' kerbside chargers



The table below outlines the charger types and their key attributes.

Table 2.5: Established kerbside chargers

Charger type	Image	Description	Key attributes
Post mounted chargers		Small footprint units installed at the pavement edge, which can be integrated into kerbside features, such as bollards, for aesthetics.	• Compact but can still obstruct pedestrian flows if poorly sited. • Clustering can add street clutter; cable management requires careful positioning to minimise trip hazards. • Generally lower-power installations
Pedestal chargers		Larger, free-standing cabinet containing one or more charge points, typically placed at the kerbside or in the carriageway potentially on a small build-out	• Larger physical footprint and greater visual impact than bollards. • Higher installation cost due to civil works and reinforced bases. • Can offer higher utilisation but with increased maintenance complexity. • Higher-power installations
Wall mounted chargers		A compact charger installed on the façade or boundary wall of an adjacent building but made accessible from the street.	• Minimal street clutter since no ground-mounted infrastructure is required. • Dependent on suitable host walls and property-owner permission. • May require cables to cross the footway, impacting safety and accessibility.
Lamppost conversions		These chargers incorporate charging hardware inside or attached to existing streetlight columns	• Low-cost, low-impact installations with no additional street furniture. • Intended for overnight or long-dwell charging due to lower power outputs. • Potential trip hazards if the adjacent parking position cannot be guaranteed and if lamppost at the back of the footway.

Cross-pavement

Cross-pavement solutions focus on safely routing a charging cable across the footway between a property and a parked vehicle. Two approaches are considered: buried gullies/cable channels and overhead gantries (Figure 2.3).Table 2.6

Figure 2.3: Hardware typology of cross-pavement kerbside chargers

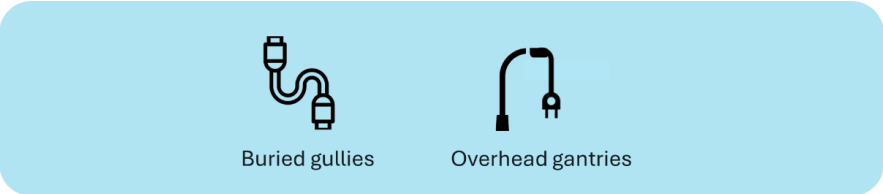
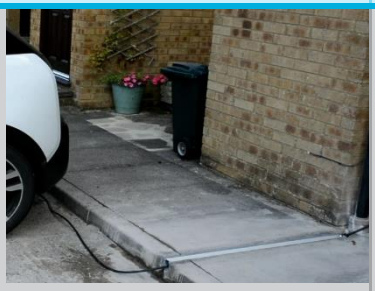
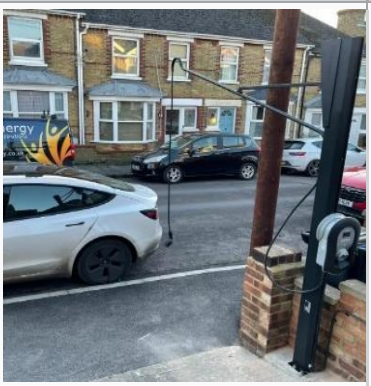


Table 2.6 presents these charger types and associated key attributes.

Table 2.6: Cross-pavement kerbside chargers

Charger type	Image	Description	Key attributes
Buried gullies		Engineered channels recessed into or across the pavement surface that allow a charging cable to run flush with or below the footway between a home-based charger and a vehicle parked at the kerb.[3]	• Very low visual impact; fully integrated into the pavement surface. • Require careful installation to maintain drainage and structural integrity. • Residual trip risks if channels are not cleared; responsibilities for upkeep must be defined. • Access to a cross-pavement gully may create a perception of informal entitlement to the adjacent on-street parking space.
Overhead gantries		These chargers use a mechanical, retractable arm, wall-mounted or freestanding, to suspend and guide a charging cable above the pavement, enabling residents to charge from a home EVSE without trailing cables	• Minimises trip hazards by lifting the cable. • Introduces more visible street infrastructure. • Requires reliable user operation to maintain safety and clearance • Access to an overhead gantry may create a perception of informal entitlement to the adjacent on-street parking space

[3] As an interim alternative, armoured mats can be placed on the surface to protect a charging cable as it crosses pavements, pedestrian areas, or roads. These mats contain a high-strength, anti-slip protective channel that safely encloses the cable without requiring any excavation.

Emerging

Emerging on-street charging solutions, in this context, refer to technologies that differ from conventional kerbside or cross-pavement installations. This includes pop-up or flush-fit units, which remain hidden beneath the pavement when not in use, and integrated or dual-purpose chargers, which combine EV charging with other street infrastructure or multifunctional hardware (Figure 2.4).

Figure 2.4: Hardware typologies of emerging kerbside chargers

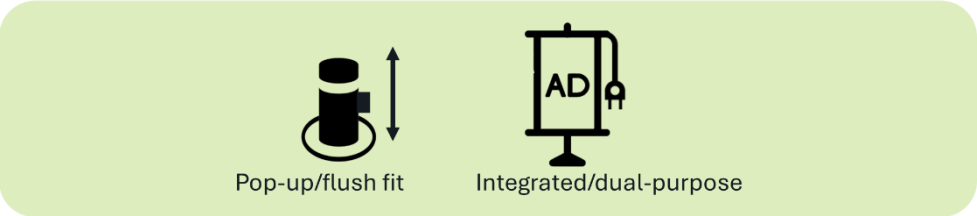


Table 2.7 gives an overview of these typologies and their key attributes.

Table 2.7: Emerging kerbside chargers

Charger type	Image	Description	Key attributes
Pop-up or flush-fit		Units installed beneath the pavement, remaining level with the ground surface when not in use. They rise mechanically or via a user-operated mechanism when charging is required. Example systems, such as Trojan Energy use a portable adaptor inserted into a sunken pavement socket.	• No permanent above-ground footprint, reducing clutter and visual impact. • Avoid obstruction when retracted.
Integrated or dual-purpose		These chargers incorporate EVSE into other pieces of street infrastructure (**Error! R eference source not found.**). They may combine charging with services such as local information displays, advertising panels, or battery storage for grid management. Examples include JOLT and BrightGreen's kerbside systems.	• Reduce clutter by consolidating multiple street functions into one structure.

Hardware typology considerations

Each of the charger types described above presents different characteristics in terms of technical specification, installation cost, accessibility, non-user impacts, and overall safety performance.

When comparing charger typologies, it is helpful to consider a set of characteristics that influence not only technical performance but also how infrastructure functions in real streets and for different users. The following factors are particularly relevant when thinking about suitability across contexts:

- **Installation cost**: This can include civil works, ground excavation, cabling requirements and any upgrades to electrical infrastructure. Some solutions, such as lamppost conversions that are close to the kerb, may require relatively minimal works, whereas more engineered options (e.g. flush-fit or pop-up units) can involve more complex installation and therefore higher costs.
- **Maintenance needs:** Different designs vary in how much inspection, servicing and upkeep they require. Typical maintenance considerations include checking for vehicle impact damage, signs of overheating, functioning payment terminals, signage, water ingress or deterioration of electrical components. Simpler, lower-power units often have lower maintenance needs, while standalone pillars may require more regular inspection.
- **User accessibility:** Accessibility considerations can include siting (avoiding obstruction of footways or dropped kerbs), mounting height, the reach and ease of handling of charging cables, and risks of trip hazards if cables need to cross the pavement. These features can materially affect how well a typology serves a wide range of users, including disabled users.
- **Non-user impacts:** Chargers can also affect people who are not using them. Factors to consider include potential street clutter, reduced pedestrian space, visual impacts, and risks from trailing cables in some configurations. Some typologies can help minimise clutter by consolidating functions, while others may introduce additional physical elements into the streetscape.
- **Safety:** While all charging infrastructure must meet relevant safety standards, designs vary in how they manage public-realm risks such as tripping hazards, exposure to moving parts, or water ingress to electrical components. These risks are generally low but can differ depending on complexity and siting.

Table 2.8 presents an overview of the different hardware types and their attributes.

Hardware summary table

The ratings assigned to each typology is a typical or average and relative rating compared to the other typologies in Table 2.8. Individual manufacturers or installation designs may perform better or worse. While the preceding sections provide brief introductions to these features, the table below summarises the key differences at a high level to support comparison across typologies. A detailed comparison of charger typology technical specifications and attributes is provided in Appendix B.

Table 2.8: Summary of charger types with technical specifications and attributes

Charger type	Power (kW)	Installation cost	Maintenance	User accessibility	Non-user impacts	Safety
Post mounted	7-22	££	££	●●●○	●●○○	●●●○
Pedestal	7-350	£££	££-£££	●●●○	●○○○	●●●○
Wall-mounted	7-22	£	£	●●○○	●●●●	●●○○
Lamppost conversion	3-7	£-££	£	●●○○	●●●○	●●○○
Buried gullies	3-7	££	££	●●●○	●●●●	●●○○
Overhead gantries	3-7	££	££	●●●○	●●●●	●●○○
Pop-up/flush fit	7-22	£££	£££	●●●○	●●●●	●●○○
Integrated/dual-purpose	3-25	£££	£££	●●○○	●●○○	●●○○

2.4.3 User types in different environments

Given that each type of charger has distinct characteristics, some solutions are naturally better suited to particular user needs and settings. To illustrate this, we consider four representative user types:

- Light commercial vehicle (LCV) and heavy goods vehicle (HGV) drivers
- Disabled users
- Private car users
- Taxi/PHV (private hire vehicle) drivers

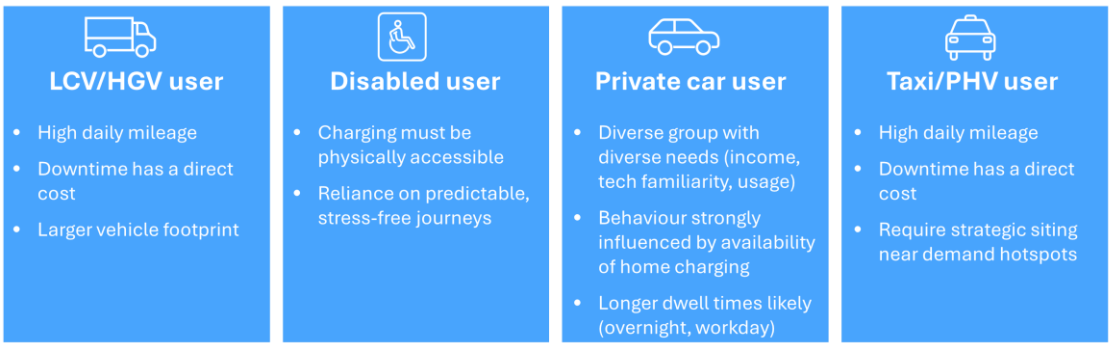
These are considered across three on-street environments: urban, urban residential, and suburban residential areas.

Before assessing which charger types align best with each user-environment combination, it is important to understand both the charging requirements and practical constraints associated with each user type, as well as the physical and operational characteristics of the different environments.

Figure 2.5 below illustrates how user characteristics shape charging behaviours and needs. For example, users with high daily mileage and time-sensitive operations, such as LCV/HGV drivers and taxi/PHV drivers, place a premium on fast, reliable charging that minimises downtime and supports predictable scheduling.

In certain circumstances, HGV operators may require access to public on-street charging, including within loading bays, to enable “top-up” charging. This may arise where operators lack dedicated depot facilities, rely on third-party, client or shared sites with constrained charging provision, or face complexities in leasing and fleet arrangements that limit the installation of private infrastructure. In these contexts, public charging can provide a complementary source of operational resilience.

Figure 2.5: User types and characteristics



While users have different charging needs, the environments where charging can occur also vary significantly and introduce their own constraints (Figure 2.6). Urban centres often have limited kerb space, high footfall, and competing demands, restricting where chargers can be placed. Residential streets may accommodate longer dwell times but often have narrow footways or inconsistent parking patterns. Suburban areas typically have more space, but less certainty of demand.

Figure 2.6: Environment types and constraints



- To understand how charger typologies align with real-world needs, it is useful to consider how each user type interacts with different street environments. Table 2.9 below summarises the key implications of these user-environment interfaces, highlighting how operational patterns and physical context combine to shape charging requirements. For a more detailed exploration of how user type and environments interact see **Appendix A.**

Table 2.9: Interface between user characteristics and environmental constraints

(Key**: user requirements in bold,** *non-user/LA requirements in italics*).

Environment	User type			
	LCV	Disabled user	Car	Taxi/PHV
On-street urban centre	**Ultra-fast charging**	**Guaranteed accessibility + reliability + clear, protected space**	**Convenience**	**Ultra-fast charging + predictability + queue avoidance**
	Minimal kerb impact + high utilisation	*Protected bay enforcement + misuse prevention*	*Turnover + kerbside efficiency*	*Queue management + traffic flow protection*
On-street urban residential	**Predictable access + longer dwell**	**Guaranteed accessibility + certainty of access**	**Long-dwell compatibility + cost effectiveness**	**Predictable access**
	Residential compatibility	*Wider residential compatibility*	*Equitable access + scalable deployment*	*Controlled residential impact*
On-street suburban residential	**High reliability + overnight energy sufficiency**	**Guaranteed accessibility + maximum reliability + proximity to home**	**Reliable coverage + cost effectiveness**	**High reliability + overnight energy sufficiency**
	Low-density compatibility	*Accessible design compliance*	*Efficient coverage per charger*	*Cost-proportionate provision*

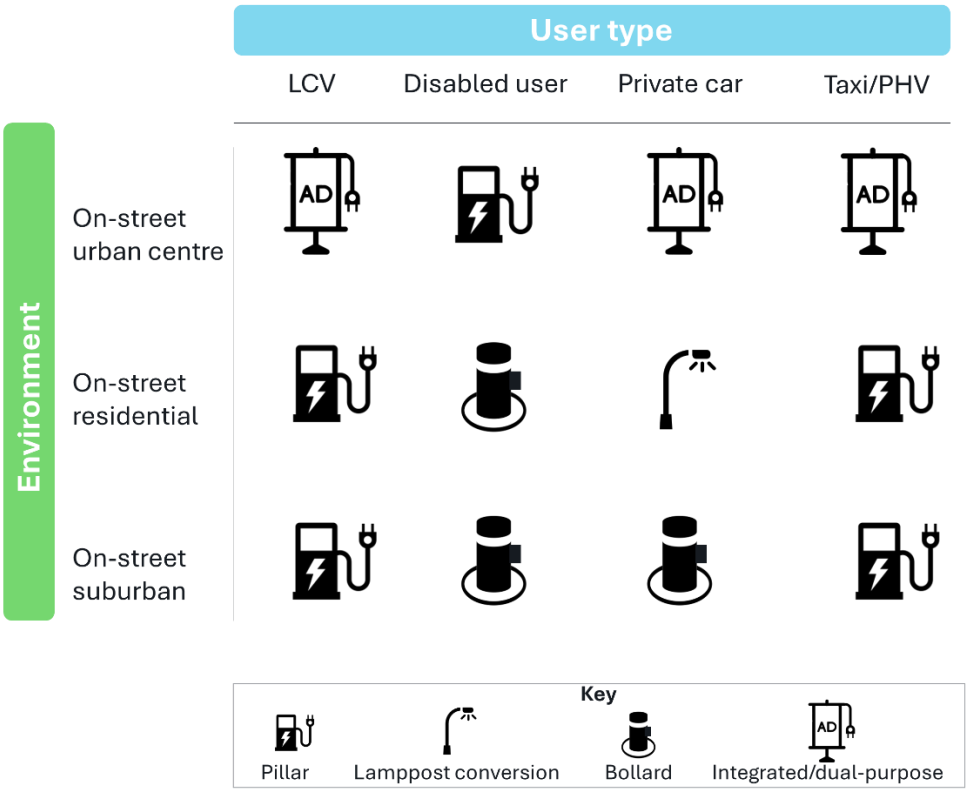
2.4.4 Charger typology matrix

The charging requirements identified in Figure 2.7 help illustrate how certain charger typologies become more suitable for specific combinations of user type and environment. For example, a commercial LCV operator in an on-street urban centre faces both high charging demand and acute space constraints. Their vehicles have a larger footprint and limited downtime, so they place a premium on faster charging and assurance that their vehicle can be accommodated by the kerbside.

At the same time, local authorities may weigh different considerations, such as minimising visual and physical impacts on already constrained street space. In this context, an integrated or dual-purpose charger can be an effective option as it can support higher charging speeds, consolidate functions into a smaller kerb footprint (e.g. charging and advertising or information), and may offer revenue models that help justify the use of valuable street space.

The matrix below summarises which charger typologies are likely to be well aligned with the charging requirements of different user groups across the on-street environments considered in this section. Full reasoning for each user-environment pairing is provided in **Appendix C**.

Figure 2.7: Charger typology matrix



These suggestions are not prescriptive but instead offer a framework for thinking about overall suitability. While an integrated dual-purpose charger may work well in the LCV example discussed above, it is not the only viable option. Small rapid-charging hubs near delivery hotspots, for example, could equally serve commercial users efficiently. The recommendations should therefore be interpreted as indicative rather than definitive.

Finally, although cross-pavement solutions do not appear in the typology matrix, this does not imply they are unsuited to the scenarios considered. In many on-street residential contexts, especially where other kerbside solutions are not feasible, gullies or overhead gantries can offer an effective low-cost and low-clutter way for residents without driveways to charge.

In this context, cross-pavement solutions are distinct from other on-street charging typologies in that they do not contribute to the public charging network. Each installation is tied to an individual property, serving a single household's vehicle parked directly outside. This fundamentally changes their function and the policy considerations that apply.

Unlike lamppost chargers or post-mounted units, which are accessible to any driver, cross-pavement solutions create a de facto private charging arrangement on public highway, raising questions around kerbside entitlement, neighbour disputes, accessibility, and highway liability that simply do not arise in the same way for shared public infrastructure.

While some providers are developing platforms to enable neighbours to share access, this remains an emerging and unproven model. For this reason, cross-pavement solutions are better understood as a complement to the public charging network that address a specific equity gap for households without off-street parking, rather than as part of it.

2.5 Policy recommendations and toolkit

When defining an overall policy for delivering charging infrastructure to define and clarify the intended outcomes of EVI, which are typically around enabling an equitable transition to zero emission vehicles. Infrastructure should consider the proportion of vehicles that are EV in the area and how this is forecast to change over time. Importantly, it should also consider how the infrastructure might impact other members of the public including non-vehicle users.

This toolkit provides guidance to ensure that the LA is thinking about meeting the needs of different user types and across different types of locations. Plans for EVI development should also consider the political, economic, social and technological trends likely to impact future demand (see Table 2.10Table).

Table 2.10: Political, Economic, Social and Technological (PEST) analysis of factors that could impact charging need/demand and requirements over time.

Political	Economic	Social	Technological
Changes in regulations and policy that impact CPO cost base for operating public charging networks will impact the cost of public charging and hence people's behaviour on where/how they charge.	For certain segments, the cost of charging will be the key driver in how they choose to charge.	As more of the population transitions to EVs, the typical behaviour of the 'mass market' and the 'laggards' will be different to the 'early adopters'.	Advancements in battery technology including greater energy density/range, faster charging, and improved efficiency could reduce the frequency and amount of charge needed by typical vehicles.

3 Emerging and alternative solutions

3.1 Overview

Part 1 of this report set out the current landscape for on-street charging across the TfSE region, including the operational, social, and spatial pressures that can constrain delivery and day-to-day management.

Building on this understanding, Part 2 shifts the focus to emerging and complementary approaches that can help relieve pressure on limited kerbside capacity by enabling access to charging elsewhere, and/or through shared models that reduce reliance on dedicated on-street residential infrastructure.

The emphasis in this part of the report is on identifying solutions that are both scalable and equitable, particularly for households without off-street parking, and assessing what it would take for these approaches to move from isolated trials into more routine local delivery. This includes considering practical feasibility (technical and operational), policy and regulatory fit, and the commercial and governance arrangements required for implementation at scale.

3.2 Digital TROs and dynamic kerbside management

3.2.1 Overview

Dynamic kerbside management (DKM) is an emerging approach enabling local authorities to improve the productivity of the kerbside in areas of high demand where space is limited. Rather than treating charge points as passive assets, DKM introduces an operational management layer that determines who can use a bay and the adjacent kerbspace.

A useful way to frame DKM in the context of on-street charging is as a means of managing the interface between charging and other kerbside uses (loading, servicing, taxis/PHV, blue badge access, residents' parking, and short-stay activity), using time-based rules and digitally managed permissions, rather than relying solely on static lines and signs.

In doing so, it can help address issues that suppress the value of on-street charging, including "ICEing" (internal combustion engine (ICE) vehicles parking in EV charging bays and blocking access to chargers), uncertainty over availability, unclear user entitlement, and inefficient enforcement. This can enable the kerbside to be more productive, flexibly serving different purposes throughout the day in response to demand and/or policy objectives for the area.

This approach requires the traffic regulation orders (TROs) that underpin the signs and lines to be digitised (D-TROs) to enable booking and management systems to refer to a single authoritative record that can be updated as per the policy intentions of the highway authority. More information on this approach can be found in Section 3.2.4.

NB: It should be noted that, while the concept of DKM is technically credible and commercially plausible, real-world deployment specifically applied to EV charging remains very limited. To date, evidence of end-to-end DKM implementation (integrating booking controls, enforcement workflows, and charging entitlement) is largely confined to small-scale pilots and proof-of-concept trials, rather than sustained operational programmes.

Within the South East and London, activity is at an early stage. Engagement for this study identified interest and exploratory work among a small number of authorities, but no established, fully operational DKM schemes specifically for EV charging bays at the time of writing.

The components exist and have been tested in adjacent contexts (kerbside booking for logistics, D-TRO integration with enforcement), but assembling them into a coherent, scalable charging-focused offer remains work in progress.

Authorities considering DKM should therefore treat it as a near-term pipeline opportunity rather than an off-the-shelf solution and engage closely with platform providers and enforcement partners to understand readiness in their specific context.

3.2.2 How DKM works in practice

Dynamic kerbside management can enable authorities to achieve several policy objectives. Stakeholder engagement highlighted a clear opportunity to use booking functionality to guarantee the availability of a charge point at a particular time. This can help improve reliability for users and therefore uptake and help to prevent ICEing or informal use of bays.

Public on-street charging utilisation rates were described by several stakeholders as averaging in the mid-teens, with booking often presented as a mechanism to improve dependability for users and increase asset productivity.

However, views were not consistent across interviewees, and booking was seen by some as appropriate only where utilisation is already relatively high or where there is a clear operational need (e.g. for commercial vehicles).

Concerns included “ghost bookings” (a bay appearing unavailable despite being physically empty), reduced ability of drivers to turn up and use a bay without pre booking and user frustration.

Fleet-specific challenges included driver/vehicle uncertainty (leading to bookings tied to the wrong vehicle registration and potential penalties), previously booked vehicles overstaying their slots and the need for tolerance around lateness (e.g. due to congestion) to avoid punitive fees and unintended non-compliance.

In practice, the enabling components of dynamic kerbside management include:

- **Booking and entitlement controls** allow the authority (and/or operator) to define who is permitted to occupy an EV charging bay during a defined time window. Where integrated with charging protocols such as OCPP or OCPI [4], the kerbside permission (a booking) can be aligned with the right to charge, reducing ambiguity and improving user compliance.
- **Occupancy and compliance** can be established through a combination of bookings data, enforcement observations, and physical infrastructure. The engagement noted that DKM can function without additional street hardware, using bookings and enforcement integration as the primary mechanism, with smart signs, ANPR integrations, or physical access controls used where they materially improve legibility and behaviour change. Some associated trials have also included rising bollards or even illuminated road markings which can display different colours to communicate the availability and intended use of the bay.
- **Conflict management features** are also enabled through DKM, including the ability to manage displacement through "virtual" or contingency bays. If a booked bay is obstructed, the system can alert enforcement and redirect the user to a nearby alternative (often unmarked) that has been pre-agreed with the highway authority in the relevant TRO. This is particularly valuable where drivers (including commercial vehicles) would otherwise circulate to find alternative parking.
- **Effective enforcement** is critical to the success of DKM. Without clear, consistent and enforceable rules, time-based or shared-use kerbside arrangements risk becoming ineffective in practice, undermining user confidence and reducing the operational value of EV charging and other kerbside functions.

DKM can be most impactful where kerbside friction is currently limiting the effectiveness of charging, or indeed restricting its implementation due to the need to retain access for other purposes. In addition to acting as a booking tool for charge points, it can also support decisions about how charging co-exists with other kerbside priorities, including throughout the day.

3.2.3 Changing uses throughout the day

Rather than treating the kerb as fixed-purpose parking, DKM allows it to be managed as a high-value public asset that supports local businesses, access needs, and street vitality at different points in the day. The streetscape remains physically stable (same frontage, same kerbline, and charging infrastructure), but the priority use changes through clear rules, variable signage, and digital controls and enforcement.

Figures 3.1-3.3 show how a single, consistent stretch of kerb can be reallocated across three time periods to reflect changing demand and use to benefit people, places and movement.

[4] OCPP is the protocol that connects a charge point to its operator's back-office system. OCPI is the protocol that connects different operators' systems to each other, enabling roaming and cross-network access

.

Morning

In the morning, the kerb is configured as a bookable loading and servicing space for the adjacent pub and convenience store, with the charging bay available to support short dwell-time "charge while you work" activity for commercial vehicles (Figure 3.1). Previous engagement with logistics industry representatives has indicated a willingness to pay for assured access to loading space in congested spaces to avoid costly failed delivery attempts.

Figure 3.1: Morning (7 AM–11 AM): deliveries and charging for servicing activity



The benefits for people, place, and movement are listed in Table 3.1 below.

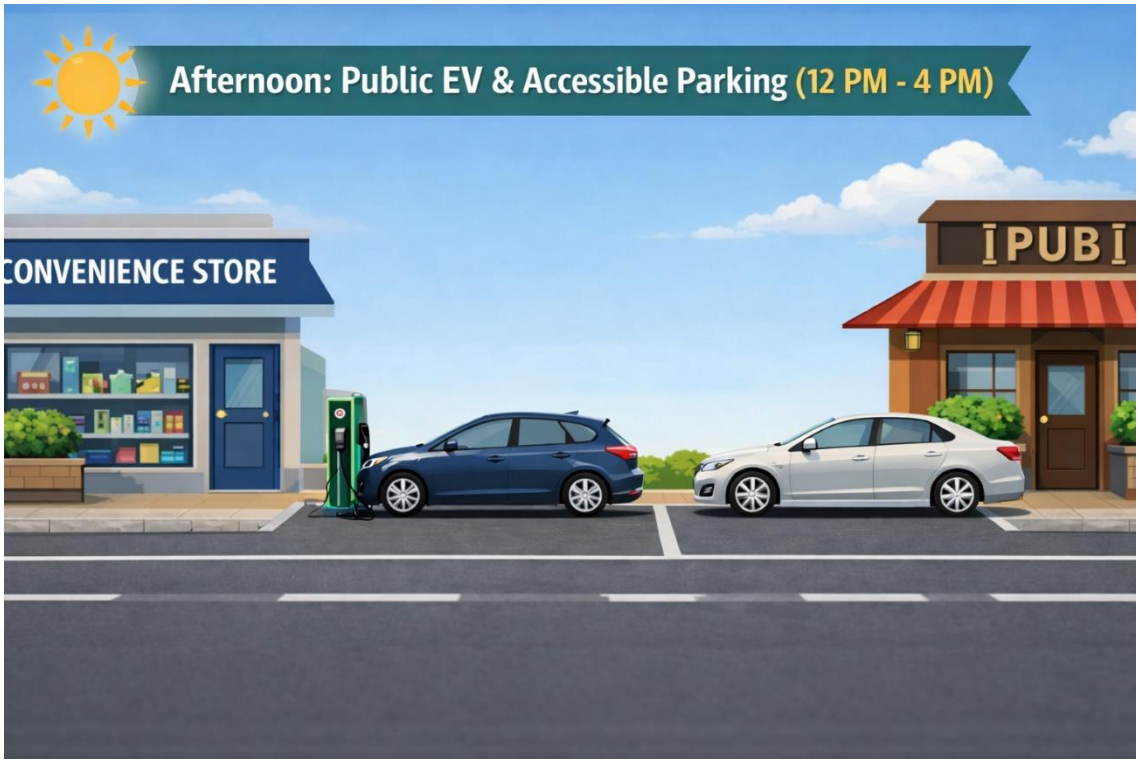
Table 3.1: Morning (7 AM–11 AM) - deliveries and charging for servicing activity

Category	Description
People	• Reduces conflicts on footways by enabling compliant, close-to-frontage servicing, minimising the temptation for informal parking, double-parking, or unloading across pedestrian desire lines. • Supports safer pedestrian movement at peak times by reducing opportunistic stopping and obstruction
Place	• Helps the pub and convenience store operate efficiently and enables reliable stock replenishment. • Enables quicker turnaround for deliveries, reducing overall dwell time and street clutter on the pavement by loading direct to the premises
Movement	• The charger provides a 'grazing' opportunity for an electric delivery vehicle, providing them with extra range and redundancy in their delivery round • Improves network efficiency and air quality by reducing circulating vehicles looking for somewhere to stop, and by discouraging loading in live lanes.

Afternoon

In the middle of the day, the kerb shifts to prioritise public access to the EV charger alongside the creation of a dedicated Blue Badge space (Figure 3.2). This reflects the need for higher discretionary trip-making, errands, and daytime appointments, as well as a need to balance charging access with inclusive kerbside provision.

Figure 3.2: Afternoon (12 PM–4 PM): public charging and accessible (Blue Badge) parking



The benefits for people, place, and movement are listed in Table 3.2 below.

Table 3.2: Afternoon (12 PM–4 PM) - public charging and accessible (Blue Badge) parking

Category	Description
People	• Improves accessibility by providing a predictable, protected Blue Badge space close to key destinations, supporting independent travel for disabled people. • Increases fairness in charging access by reserving space for active charging, reducing charger blocking (ICEing) and improving confidence for drivers who rely on public charging.
Place	• Supports daytime footfall by making it easier for people to stop briefly, access local services, and spend time on the high street. • Helps normalise charging infrastructure as part of the everyday streetscape without creating all-day dominance of kerb space by a single user group.
Movement	• Increases charger utilisation by aligning availability with daytime demand (potentially for employees of the adjacent businesses), improving the productivity of the asset and reducing wasted kerb capacity. • Reduces unnecessary circulation associated with searching for charging or convenient parking, particularly in constrained local centres.

Evening

In the evening, the kerb is reallocated from vehicle storage to offering outdoor seating for the pub, creating a clear "place-led" outcome when freight demand drops and social activity increases (Figure 3.3). In this configuration, the kerbside can contribute to local economic vitality without permanent road space reallocation.

Figure 3.3: Evening (6 PM–10 PM): outdoor dining and a more vibrant street



The benefits for people, place, and movement are listed in Table 3.3 below.

Table 3.3: Evening (6 PM–10 PM) - outdoor dining and a more vibrant street

Category	Description
People	• Creates additional, public, social spaces, supporting informal community interaction and improving perceived safety through passive surveillance and activity. • Offers more choice and capacity for customers, improving the quality of local hospitality venues.
Place	• Enhances local character and street vibrancy, contributing to a stronger evening economy and a more attractive destination. • Demonstrates visible, tangible value from kerbside management. The same space supports commerce and community at different times, rather than sitting underused.
Movement	• Reduces competing evening kerbside demands (e.g., short-stay parking pressure) by providing a clear, managed, policy-aligned alternative use. • Helps manage congestion around peak leisure periods by limiting informal stopping and creating a more orderly kerbside arrangement.

3.2.4 Digitisation of TROs and the emerging regulatory approach

DKM does not replace D-TRO platforms. Instead, it sits downstream, using legally defined kerbside rules (permitted users, time windows, restrictions) via API integration and translating them into bookable, enforceable capacity on the highway.

This supports a "single source of truth" approach, where the legal basis is clearly defined while operational allocation can be managed more dynamically. Where D-TRO coverage is incomplete, DKM platforms may be able to populate kerbside assets and rules temporarily, but this is positioned as a fallback rather than a preferred long-term approach.

AppyWay, a D-TRO management platform, described a proposition centred on presenting a transparent and current view of restrictions (including tariffs and dual-use), and live feeds to enforcement partners. For EV charging specifically, the platform can publish bay inventories to CPOs and support live dashboard reporting to track progress against targets.

Following the engagement for this project, two practical points are worth emphasising:

- **Data quality and consolidation:** D-TRO maturity and consolidation of orders are prerequisites for dependable kerbside planning and managed operations, and councils may need a survey to reconcile legal records with the on-street reality. Many councils maintain a bank of PDFs with non-standardised descriptions of kerbside permissions, making it challenging to get a strategic understanding of kerbside allocation across an area.
- **Data model gaps can affect charging typologies:** EV bays can be represented in D-TRO management platforms, but not all forms of infrastructure are currently shown. AppyWay noted the absence of a specific lamppost charging restriction category at present, and that gully charging is not yet consistently adopted across boroughs (with corresponding impacts on standardised categorisation).

Regulatory readiness

Policy and regulatory readiness are still developing. AppyWay noted that D-TROs have been made mandatory in primary legislation, but that the absence of a DfT deadline slows uptake in some authorities, and that slower progress on the National Parking Platform (NPP) affects the scale of nationally interoperable consumer-facing services. This points to varied states of readiness across the TfSE area and reinforces the need for staged approaches that match interventions to governance maturity and operational capacity.

Table 3.4 shows the LTAs within the TfSE area currently using D-TROs (according to each platform's website).

NB: It should be noted that the current TRO regime was not designed for flexible use of the kerb, and therefore a 'workaround' approach is required to deliver a kerbside that can be managed flexibly, as opposed to fixed yet timed restrictions.

TRO documents in existing pilots are worded to allow 'permitted vehicles only', with a whitelist of users managed via the DKM platform, linking through to enforcement/entitlement databases.

Table 3.4: TfSE LTAs utilising D-TRO platforms.

Evidenced on D-TRO websites	Not evidenced on D-TRO websites
Traffweb (Buchanan/Causeway) client hub: • Bracknell Forest Council • Hampshire County Council • Kent County Council • Portsmouth City Council AppyWay Streets authority list (streets.appyway.com) • Eastbourne • East Sussex – Hastings • East Sussex – Lewes • East Sussex – Rother • Southampton City Council	• Brighton & Hove City Council • East Sussex County Council (separate from the district entries under AppyWay) • Isle of Wight Council • Medway Council • Reading Borough Council • Royal Borough of Windsor and Maidenhead • Slough Borough Council • Surrey County Council • West Berkshire Council • West Sussex County Council • Wokingham Borough Council

Technology readiness

From a technology readiness perspective, stakeholder engagement evidenced that booking-led checks and enforcement integrations are operationally credible now, particularly where enforcement partners can use live restriction and booking data. DKM platforms are framed as a digital overlay on existing bays rather than a new enforcement regime.

Integration of booking platforms with enforcement workflows has already been proven, linking D-TRO platforms with handheld devices used by parking enforcement officers. Where such integrations are not available, variable digital kerbside signage can be used to indicate current and upcoming bookings to users and enforcement officers.

Bay occupancy status can be confirmed through several approaches including ANPR cameras and AI-powered camera monitoring solutions capable of tracking multiple user classes, their locations, and trajectories. In some locations, floor-mounted sensors have been employed, however these are more expensive and provide less functionality.

Commercial readiness

Commercially, stakeholder engagement identified several plausible routes to market for integrating DKM with on-street charging, including local authority-led procurement with revenue sharing; CPO-funded access to booking functionality in return for improved utilisation; and blended models combining booking fees with charging tariffs.

The most appropriate model is likely to vary by location depending on demand intensity; existing contractual arrangements between authorities, D-TRO/DKM providers, and CPOs; and policy priorities (including equity considerations). It should be noted that the willingness to pay for bookable loading bay functionality should be verified through engagement ahead of delivery, as not all locations face the same degree of pressure at the kerbside. The addition of EV charging opportunity, however, strengthens this for operators of electric fleets, as well as providing an additional revenue stream outside of deliver windows.

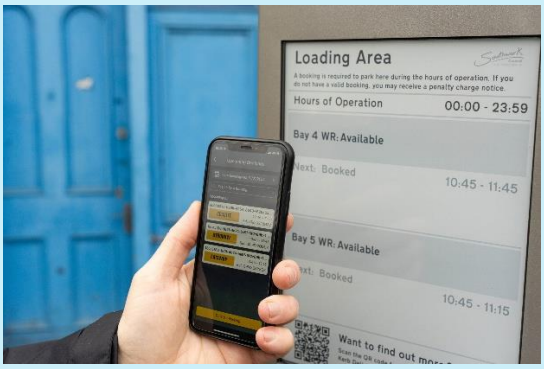
A key guidance point is that benefits are distributed across multiple parties (LTAs, CPOs, enforcement, delivery and servicing providers, and users), so delivery at scale will require explicit alignment on roles, data sharing, customer service responsibilities (e.g., booking errors and enforcement), and the intended balance between operational efficiency at the kerbside and inclusive access.

Case study: Transforming freight deliveries through bookable kerbspace in the London Borough of Southwark

In partnership with Southwark Council, Grid Smarter Cities has introduced a dynamic, bookable kerbside management system on one of London's busiest high streets.

Through the Kerb® Delivery platform, drivers can pre-book loading bays and rely on real-time e-ink signage and enforcement-backed compliance, reducing circling, congestion, and conflicts with other road users. To complement this offering for larger fleets, a web-based platform is also available to support fleet operations staff in managing logistics movements remotely. Five bays, including one for HGVs, provide round-the-clock access and support a wide range of business needs.

Figure 3.4: Kerb® app in use on Walworth Road



Source: Grid Smarter Cities

More than 40 freight operators now use the system, weekly bookings continue to rise, and businesses report higher first-time delivery success. The kerbside booking scheme has also led to fewer penalty charges, which demonstrates that a more controlled loading environment has been achieved in a busy area, and has enabled a more targeted enforcement approach to improve efficiency.

Figure 3.5: Dynamic signage on Walworth Road displaying booking information



Source: Grid Smarter Cities

3.2.5 Practical guidance: where DKM is most likely to add value

One of the strongest use cases identified for integrated DKM and charging is commercial and fleet activity, where vehicles dwell at the kerbside for sufficient periods to support opportunity charging while delivering, collecting, or servicing. By allowing a vehicle to work and charge for longer periods of time, more deliveries to the area can be made on foot, reducing circulation and interactions with the kerb, and therefore pressure on surrounding streets.

By contrast, residential lamppost or bollard contexts are more complex. These locations often lack clearly defined TRO-based bays, and booking-led control can be harder to communicate and enforce, and may be less acceptable where charging is intended to remain open-access.

This does not rule out DKM in residential contexts, but it suggests a more cautious, phased approach, with careful attention to legibility, fairness, and the wider streetscape and accessibility impacts.

When specifying a dynamic kerbside, the following points should be considered:

- **Start with the right locations.** Prioritise areas where kerbside conflict and reliability issues are clearly constraining charging outcomes (often mixed-use and commercial corridors), rather than deploying DKM where demand is still low and governance is limited.
- **Confirm the legal and data baseline.** Ensure TRO restrictions, bay extents, and operating hours reflect the on-street reality. This is best-achieved through a D-TRO management platform to provide a transparent and accessible single source of truth.
- **Implement booking and entitlement with clear enforcement.** Make it straightforward for enforcement teams to verify entitlement and ensure the customer experience includes mechanisms to reduce avoidable disputes (e.g., booking amendment windows, clear rules on overstays and associated penalties).
- **Tailor the commercial model to local objectives.** Decide early whether the primary value is utilisation uplift, reduced operational burden, improved compliance, user assurance, or revenue generation, and structure contracts and data-sharing accordingly.

In summary, DKM is emerging as a credible solution that can materially improve the management of on-street charging, particularly where the key challenge is not the absence of infrastructure but the operational frictions and kerbside conflicts that undermine its performance.

It should, however, be presented as part of a staged pathway, contingent on D-TRO maturity, data quality, and platform integration across enforcement and CPO systems, with careful attention to inclusive access and wider kerbside impacts.

3.3 Shared domestic charging

3.3.1 Overview

Shared domestic charging refers to a set of models that enable EV drivers, particularly those without access to private driveways, to charge using home chargers owned by other households or installed in shared neighbourhood spaces. It sits between fully private

home charging and public on-street charging, offering a low-cost, community-based complement to local public networks.

Peer-to-peer platforms such as Co-Charger, JustCharge/JustPark, Joosup, and Trojan Home allow residents to share under-utilised domestic chargers, helping to expand access to affordable, near-home charging. Co-Charger primarily supports commercial drivers who require regular, repeat bookings; Trojan Home focuses on shared pavement-level access to domestic-tariff charging; and Joosup and JustCharge provide flexible, community-based booking models.

Shared domestic charging is not a substitute for delivering kerbside infrastructure; rather, the two approaches are complementary. These models can support early uptake where infrastructure is limited and provide low-cost flexible access to users. Both approaches need to be promoted in parallel, and when deployed in a targeted way, such models can help to bridge the gap between infrastructure supply and charging demand.

3.3.2 Enablers and barriers

Shared domestic charging only works at scale where a set of enabling conditions line up across people, infrastructure, and platforms. The section below sets out the findings from engagement with shared domestic charging operators, highlighting the key enablers and barriers that determine whether peer-to-peer and pavement-access models can move beyond niche uptake and become a meaningful complement to kerbside provision.

The assessment is structured around four themes:

- User adoption and accessibility
- Technical and operational feasibility
- Governance, legal and regulatory frameworks
- Digital systems, data and payments

These factors shape where shared domestic charging is most viable, and the extent to which it can bridge short-term gaps in local charging availability whilst on-street networks mature.

User adoption and accessibility

Shared domestic charging works best where participation is structured to build trust and reliability. One important enabler is managed or semi-exclusive sharing, where hosts limit the number of chargees they accept. Evidence from platforms such as Co-Charger suggests that hosts often cap participation at around three regular users, which helps reduce concerns around misuse, improves confidence in availability, and supports repeat, predictable charging behaviour.

Targeted commercial partnerships further enable user adoption by aligning shared charging with clearly defined demand. Co-Charger's partnership with Allstar illustrates how using data such as postcodes to match suitable hosts with LCV drivers can overcome awareness barriers and focus provision on users most likely to benefit. Similarly, LCV drivers are likely to be users of Allstar's payment services.

Despite these enablers, awareness of shared domestic charging remains low. Many residents are unfamiliar with the concept or its benefits and may not realise that a variety of charger types and access models can meet different needs. On the flip side to this, users can be easily disincentivised by adding complexity like multiple charger types.

Physical access barriers also constrain uptake, particularly where pavement crossings, narrow footways, or awkward parking geometries make private-to-public access more difficult. Coverage is also uneven, with networks still too sparse in many areas to be genuinely convenient for users. Co-Charger, for instance, aims for chargers to be within a five-minute walk, yet current networks often require much longer travel times.

Technical and operational feasibility

There are many enablers of shared domestic charging in terms of technical aspects. Such models rely on existing household electricity connections, meaning they avoid the need for extensive infrastructure works, keeping costs and disruption low. Smart chargers add further capability by enabling load management, access control, and scheduled charging, allowing hosts to manage demand and usage. These systems naturally align with overnight charging patterns that flatten peak loads on the grid, though shifting user behaviour, such as declining reliance on overnight sessions within the Co-Charger model, suggests that perceptions of reliability and convenience can evolve over time.

However, important limitations remain. Most domestic chargers offer lower power and longer charge times than public rapid chargers, making them less suitable for certain user groups or urgent charging needs. Capacity constraints within homes, particularly older properties with limited single-phase (rather than three-phase) electrical systems, can further reduce suitability. Interoperability challenges between different charger brands and platforms also persist, creating friction for both hosts and chargees. As seen in the Co-Charger ecosystem, charging hardware and platform compatibility is not yet seamless, which complicates scale-up and limits user flexibility.

Governance, legal, and regulatory frameworks

Partnerships between local authorities and charging platforms are emerging as a key enabler of shared domestic charging. Some operators see particular potential in models where councils actively stimulate uptake through targeted grants. For example, Co-Charger has suggested a local-authority-led shared charging grant scheme, in which small financial incentives are offered to early adopters who begin sharing their chargers. Other providers, such as Trojan, emphasise instead the importance of councils being willing to approve and deploy solutions at scale. In London, where Trojan Home has expanded rapidly, council willingness to facilitate and approve installations has been a critical factor in accelerating uptake.

However, regulatory and legal uncertainty remains a significant barrier. Liability and insurance responsibilities between hosts, users, and platforms are not always clear, and restrictions on cables crossing public highways or pavements complicate installation in densely populated areas. Although Trojan Home systems no longer require planning permission following recent regulatory changes, including the removal of Section 50 requirements, local authorities often impose additional checks or paperwork due to risk aversion. This inconsistency creates uncertainty for providers and slows deployment, especially where councils lack clear guidance or precedent.

Digital systems, data, and payments

Digital systems play a critical enabling role in shared domestic charging by facilitating transactions and generating consistent, granular data that can inform planning and policy decisions. Platform-level metrics, such as utilisation rates, repeat usage, and host–

chargee retention, make it possible to assess how shared charging operates in practice and where it is delivering the greatest value for users and hosts.

For example, Co-Charger tracks “stickiness,” measuring the frequency with which hosts and chargees return for repeated sessions. This metric provides an indicator of behavioural change and charging reliability, which can be translated into estimates of reduced vehicle miles travelled, and lower reliance on public networks. Where shared with local authorities, such data has the potential to support evidence-based decisions on where shared domestic charging is most effective, how it complements on-street provision, and whether it warrants targeted policy support or funding.

However, digital fragmentation remains a substantial hurdle. The proliferation of different apps and platforms reduces visibility and consistency for users, who may struggle to navigate an increasingly complex ecosystem. Digital exclusion also poses risks: residents without smartphones, bank accounts, or reliable connectivity may be unable to participate. Constraints around data-sharing, especially with local authorities, add further complexity, limiting opportunities to use insights for planning, network management, or identifying local charging gaps.

Case study: Trojan Home

Trojan Home is a shared domestic charging solution developed by Trojan Energy that enables residents without private driveways to access low-cost, home-connected EV charging directly on their street. It bridges the “driveway divide” by extending the benefits of domestic electricity tariffs to on-street charging and can be used by multiple drivers in a neighbourhood.

Figure 3.6: Trojan Home chargers



The chargers are designed for sharing, with flat, pavement-level units that minimise street clutter. Hosts can use the charger themselves and make it available to neighbours on a pay-as-you-go basis, receiving reimbursement for electricity consumed by others. Chargers are smart-enabled to support load management and overnight scheduling, and a monthly subscription covers installation, maintenance, and network access.

Engagement with Kent County Council (KCC) indicates that the council has already delivered 10 Trojan Home installations as part of its pilot programme, with a further 40 planned and potential for additional expansion. KCC described the product as enabling access to home-tariff charging through a subscription model and has performed well on simultaneous-touch electrical safety considerations. The concept is considered as semi-public sharing, supporting a small cluster of nearby households rather than competing directly with the public LEVI network.

3.4 Shared depot charging

Shared depot charging is increasingly being explored as a practical way to expand charging capacity by making better use of existing fleet sites, particularly in dense urban areas where space and on-street provision are constrained. Early pilots show growing interest, and the potential role of digital tools in enabling shared access.

Paua’s shared depot service (“Paua Share”) provides a managed model that connects fleet operators with under-utilised chargers at secure, semi-private sites such as bus and logistics depots through a digital matchmaking and access platform. Depot owners retain

control over access rules, operating hours and vehicle compatibility, while Paua manages contracts, authentication, billing and fleet-level reporting through a single interface.

By opening up high-capacity depot infrastructure, including sites equipped with rapid and ultra-rapid chargers, the model helps address one of the key barriers to commercial fleet electrification: reliable access to suitable charging where dedicated depots are unavailable or insufficient. This approach improves asset utilisation, reduces reliance on constrained public charging networks, and provides fleets with greater operational flexibility while maintaining site security and operational integrity.

However, significant obstacles to wider adoption remain. Many depots face acute space and security limitations, data-sharing processes are complex, and operational cultures are often resistant to external users. Policy uncertainty and market volatility further complicate long-term planning, making it essential to understand the conditions under which shared depot charging can genuinely relieve pressure on public and on-street networks.

3.4.1 Enablers and barriers to shared depot charging

Planning and site constraints

Interest in shared depot charging is growing, particularly in London, where space, infrastructure, and cost pressures are most acute. Public sector bodies such as local councils, which often operate in highly constrained urban locations, see shared use as a potential way to alleviate these challenges. Several stakeholders are already piloting or exploring pilot arrangements, demonstrating a willingness to collaborate where regulatory or operational issues can be resolved.

However, depot space remains a significant limiting factor. Many existing sites can barely accommodate their own fleets, with double-parking and restricted layouts already common. Furthermore, in some cases, introducing additional vehicles may require planning permission for upgrades or changes to site use.

Beyond these physical constraints, legal, security, health and safety and insurance requirements add further complexity. Organisations are often deterred by the need to establish clear liability between partners, manage third-party access, and maintain operational safety in environments not designed for shared use.

Safety and security

There is some precedent for secure collaboration among emergency services. Islington, for example, has successfully shared depot space with the Metropolitan Police, showing that with appropriate agreements, shared access is possible.

Nonetheless, security concerns remain one of the most significant barriers. This is especially the case for depots that store high-value equipment or sensitive operations. Allowing external users onsite introduces risks related to theft, vandalism, and general site safety. Overnight operations and the need for tightly controlled perimeters make many public sector fleets particularly reluctant to open their sites to others.

Some organisations, such as First Bus, have three different types of depot models:

- **Inside the fence** – located within the physical boundary and infrastructure is typically used by those who have been given permission.

- **Flex the fence** – made available to third parties or partner fleets, especially outside peak usage times e.g. through temporary fencing.
- **Outside the fence** – charging infrastructure is positioned outside an operator's depot boundary, including public charging hubs, shared-use depots, or en-route charging sites open to multiple users and operators.

Metering, billing, and data

Digital tools used in some early pilots, such as booking platforms and RFID-based access controls, show promise in enabling shared charging infrastructure within private depots. These solutions could support accurate metering and billing, potentially allowing hosts to offer discounted rates to partner organisations and share costs.

Despite this, charging other organisations remains operationally complicated. Metering and reconciling energy use across different entities can be difficult, and invoicing processes may be cumbersome. Data sharing adds further friction: organisations must exchange usage, billing, and operational information, which is challenging where particular cybersecurity concerns exist, such as is the case for fleet operators like the Police. The absence of standardised systems for access control, metering, and data exchange makes scale-up even more complex.

Operational and cultural factors

Some organisations are open to hosting external users, particularly when shared charging can help offset infrastructure costs or support broader electrification ambitions. There is also growing recognition that enabling depot and workplace charging could ease demand on constrained public and on-street networks.

However, operational culture remains a major barrier. Several stakeholders expressed discomfort with the idea of external vehicles or drivers entering their depots, fearing disruption, reduced operational control, or unintended inefficiencies. For many, these cultural and operational hesitations weigh just as heavily as technical or regulatory ones.

Competitive dynamics between organisations add another layer of complexity. In sectors where shared depot charging could deliver the greatest benefits, such as road haulage, operators are often direct commercial rivals. This makes collaboration difficult, as organisations fear losing competitive advantage or revealing commercially sensitive operational patterns and practices.

Related to this is the differing motivation between local authorities and private operators when acting as infrastructure hosts. Local authorities are typically driven by public value, emissions reduction, and broader social outcomes, which can translate into lower margins and greater openness to shared use. In contrast, private operators are generally more commercially focused, with revenue generation and return on investment shaping their willingness to share facilities. These misaligned incentives can hinder the development of such shared charging arrangements.

Policy and market instability

Policy support, such as grants, guidance, or regulatory incentives, could help unlock shared charging models. In particular, grant programmes that encourage collaboration, such as funding bids structured around consortia (made up of CPOs, OEMs, operators, SMEs, for example), can provide a formal mechanism for cooperation,

knowledge-sharing, and relationship-building. While these early collaborations often remain limited to familiar or trusted partners rather than encouraging fully open sharing, they still represent a meaningful first step in reducing barriers and fostering wider engagement over time.

Despite these potential benefits, policy uncertainty remains a significant challenge. Organisations are often unsure about the long-term expectations or rules around shared infrastructure, for example, whether a depot host that initially installed chargers with grant funding is permitted to profit from offering shared access. Such questions remain unresolved within current Department for Transport (DfT) guidance, creating hesitation around investment and shared-use agreements.

These policy ambiguities interact with wider market instability. With technology standards evolving rapidly and suppliers sometimes exiting the market, organisations face difficulties making long-term planning and investment decisions. Public sector procurement cycles, which are typically lengthy and inflexible, further compound these risks by limiting the ability to respond to new opportunities or adapt to changing conditions.

3.4.2 Key findings

Shared depot charging is widely acknowledged as a promising way to reduce pressure on on-street charging infrastructure. Early pilot projects and a general willingness among some organisations to collaborate highlight the potential of this approach. Emerging digital tools for booking, metering, and access control also provide important enablers.

However, significant barriers remain. Space limitations, safety and security concerns, complex billing and data management processes, and entrenched operational cultures all hinder progress. Unlocking the full potential of shared charging will require coordinated policy intervention and greater standardisation in planning processes, safety requirements, metering systems, and data exchange protocols.

Case study: First Bus launch of “First Charge”

In July 2025, First Bus launched First Charge, a shared depot charging initiative that opens 15 depots across Scotland and England for use by businesses and fleet operators, and, in Glasgow, by the wider public.

Figure 3.7: First Charge superhub



Source: **Electrical Times**

Figure 3.8: Calibre D2D



Source: **First Charge**

The Caledonia depot in Glasgow is the flagship First Charge site. During off-peak bus operating hours, the depot functions as a public-facing, ultra-rapid charging hub with capacity to charge up to 34 fleet and consumer vehicles simultaneously. Charging is available between 09:00 and 16:30, when buses are in service, at an introductory tariff of £0.39/kWh. Access is enabled through multiple payment options, including contactless payment and roaming cards and apps such as Fuuse, Paua, Electroverse and Allstar, reducing barriers for both fleet and individual users.

Calibre, a logistics operator, provides an example of how First Charge operates as shared depot infrastructure for commercial fleets. Calibre has used the network to charge over 300 vehicles across 14 First Bus depot sites, consuming approximately 72 MWh of renewable electricity.

Reported benefits include improved operational efficiency through access to high-capacity depots capable of charging multiple vehicles simultaneously, simpler back-office processes enabled by consolidated billing and single-network access, and lower carbon emissions through the use of renewable electricity and the avoidance of diesel-powered vehicle transport.

3.5 Complementary solutions, technologies, and governance models

3.5.1 Complementary solutions

Overview

As the UK's EV charging ecosystem matures, it is increasingly clear that no single delivery model can meet the full diversity of user needs.

Complementary charging solutions, situated at the intersection of on-street and off-street provision, represent the *next stage* of EV infrastructure development, offering scalable, cost-effective options that extend accessibility while balancing local space, grid and social constraints.

The following solutions can be applied to allow local authorities to make better use of existing land assets, reduce visual and operational pressure on streets, and support a broader range of vehicles, from private cars and car clubs to vans and HGVs.

This section outlines seven principal types of complementary charging infrastructure emerging across the UK. Each is described in terms of function, user segments, indicative power, land types, delivery models, and practical examples. The approaches outlined below are designed to respond to specific local contexts and user needs. They can be deployed individually or in combination as part of a mixed-network approach.

Commercial and mixed-use charging hubs

Description

Commercial and mixed-use hubs are large, multi-bay charging facilities located on retail, industrial, or business park premises. They serve both public and fleet users, typically combining short-stay rapid charging for users with longer dwell opportunities for employees or overnight fleet charging.

Where deployed, they are usually equipped with rapid or ultra-rapid chargers (50–350 kW) at locations that already attract regular vehicle dwell time, such as supermarkets, retail parks, leisure centres, and service areas.

Key features

- High-capacity power connections or private grid reinforcement
- Opportunity for solar canopy integration and behind-the-meter storage
- Amenities that enhance site attractiveness (Wi-Fi, café, washroom facilities)
- Co-location with other complementary services such as shared micromobility and parcel lockers.

Role and benefits

These hubs are particularly effective in areas where residential on-street charging is limited but commercial land is available. They can support:

- Overnight charging for local residents and tradespeople.
- Daytime charging for fleets, service vehicles, and delivery drivers.
- Grid-balancing through smart energy systems, solar generation, and storage.

Delivery and business models
Delivery models vary: some hubs are delivered through landlord–tenant arrangements, others via public–private joint ventures or CPO-led concessions. Revenue streams can include:

- Land lease or concession models between landowners and CPOs
- Shared revenue or anchor-tenant arrangements with fleets or retail partners
- Potential integration with private wire energy supply or community energy schemes.

Case study example
Oxford Energy Superhub demonstrates this concept at scale. It combines 42 ultra-rapid chargers, onsite battery storage, and renewable generation. Its governance model, combining the City Council, EDF Renewables, and Pivot Power, illustrates how complementary commercial partnerships can work effectively under a shared decarbonisation objective. EV hubs as catalysts for economic renewal.

Park-and-charge concepts

Description
Park-and-charge schemes adapt existing public or private car parks, transport interchanges, and park-and-ride facilities to provide EV charging, typically at standard (7–22 kW) speeds. Such sites often offer smart access and payment systems, typically via mobile apps or RFID cards, and are integrated with parking management systems and existing tariffs.

Furthermore, they offer the opportunity for renewable energy generation integration or managed charging for grid balancing. These are particularly effective for residents without home charging, commuters, and small fleets operating in urban and peri-urban areas.

This model often represents the lowest-cost and most scalable near-term solution for local authorities, making use of public land and existing power connections.

Role and benefits
Park-and-charge concepts offer multiple benefits, including:

- Utilise underused parking capacity, especially overnight.
- Offer scalable, grid-efficient solutions with minimal disruption to parking.
- Support integration with active travel and public transport by placing charging at key modal interchanges.

Delivery and business models
Most park-and-charge projects are delivered under CPO concession models with local authority land leases. In some cases, councils retain ownership of the chargers and contract operators for maintenance. Tariff income can offset energy costs or alternatively contribute to local energy schemes.

- Local authority-owned and operated under LEVI funding
- CPO concession models with performance-based revenue sharing
- Hybrid models combining resident permits with public pay-as-you-go access.

Case study example
Kent County Council's Park & Charge network has demonstrated how underused car parks can be transformed into accessible, low-cost charging hubs for residents, using smart load management to make best use of limited grid capacity.

The *Oxford Park & Charge* pilot (2021–23) demonstrated that overnight residential charging demand can be met effectively through council car parks, with utilisation averaging 40–60% during off-peak hours. Similar models are now being adopted across county authorities, including Kent, Oxfordshire, and Dorset, as part of LEVI delivery strategies.

Mobility and transport hubs

Description
These are integrated sites combining EV charging with shared mobility options, such as EV car clubs, e-cargo bikes, and public transport services, within a single, well-designed space. They are increasingly viewed as key nodes in multi-modal networks that support behaviour change and reduce car dependency.

Whilst the charging infrastructure is dedicated to the EV car clubs vehicle and therefore not directly available to owners of private cars, car clubs provide convenient alternative for people who only need access to a (second) car occasionally. This helps to reduce rates of car ownership, and therefore pressure on on-street charging infrastructure.

Role and benefits

- Enable seamless interchange between shared mobility services (including car clubs) and public and active modes of transport.
- Provides visible community anchors for accessing shared zero-emission transport.
- Improve land-use efficiency by clustering modes and reducing car ownership.

Delivery and business models
EV car clubs at mobility hubs Typically delivered via local authority-led partnerships, often supported by developer contributions, or mobility-as-a-service (MaaS) operators. Funding can be provided through Section 106 agreements, public land leases, or innovation funding (e.g. DfT Future Transport Zones).

Case study example
Opened in 2025, the mobility hub at *Plymouth Coach Station* brings together a powerful mix of transport options in one convenient location including a fleet of e-bikes, an electric car club vehicle, Rapid EV charging stations, a real-time bus stop; proximity to the city's coach station (just 50 metres away); and walking and cycling infrastructure. Located next to Plymouth Central Library, the hub also offers easy access to public toilets, tourist information, cafés, shops, and other city centre amenities, making it a natural gateway for both locals and visitors.

Shared residential and fleet charging zones

Description
In mixed-use or high-density areas, shared charging zones can serve both residents and local SMEs, such as maintenance contractors, delivery firms, or taxi drivers. Located on public or semi-private land (e.g. depots, industrial estates, or community facilities), they

allow time-scheduled or subscription-based access for vehicles that are parked for predictable periods.

Role and benefits

- Reduces duplication of infrastructure across small business and household use.
- Supports electrification of light commercial vehicles without full depot access.
- Enables dynamic pricing and load management across user groups.
- Combination of AC and DC chargers depending on fleet mix
- Potential for smart load balancing and energy trading between users
- Often paired with solar PV and on-site storage to optimise energy costs

Delivery and business models
Can be delivered under cooperative ownership models or community subscription schemes where usage rights are shared. In some cases, local authorities act as data platform owners while CPOs manage hardware and payments.

- Co-investment or anchor-tenant model (e.g. a fleet operator underwriting site utilisation)
- Community interest company (CIC) or cooperative models for neighbourhood deployment
- Long-term lease or revenue-sharing agreements with the local authority.

Case study examples
Nottingham's Community Charging Zones demonstrate shared access for residents and small commercial operators, with flexible tariffs and managed access via digital booking platforms.

The *Shared Access EV Charging Pilot* in Dundee successfully integrated residential and fleet use through managed scheduling software, achieving higher asset utilisation rates and demonstrating the potential for cross-sector partnerships in constrained urban settings.

Electric freight and servicing micro-hubs

Description
Micro-hubs are compact sites supporting last-mile delivery, e-cargo bikes, trades, or service fleets. They may combine charging with parcel storage, micro-logistics operations, and sometimes small-scale renewable generation.

Role and benefits

- Reduces the need for freight vehicles to travel long distances for charging.
- Supports urban logistics decarbonisation and ZEFZ (Zero Emission Freight Zone) objectives.
- Enables shared use between logistics operators, local businesses, and council fleets.
- Sites typically 500–2,000 m^2, located on industrial or local authority land
- Mix of rapid (50–150kW) and depot-style slow charging for different vehicle profiles
- Integration with cargo-bike logistics, shared micro-mobility, or consolidated delivery services

- Opportunities to repurpose underused land or redundant car parks

Delivery and business models
Micro-hubs are often developed through public–private logistics partnerships or developer-led schemes within new industrial or regeneration areas. Such sites may be co-funded via freight innovation or LEVI+ demonstration programmes. Typical delivery models include:

- Public–private joint ventures with logistics operators or property developers.
- Anchor-tenancy by courier or fleet companies guaranteeing base demand.
- Inclusion within city freight consolidation strategies and zero-emission freight zone pilots.

Case study examples
The West Midlands Freight Innovation Hub integrates rapid charging with shared loading bays and data-driven access scheduling. The model highlights the value of shared micro-hub infrastructure in managing urban logistics emissions.

In London, *Westminster City Council's Micro Logistics Hub* (operated with Cross River Partnership) demonstrated up to 70% reduction in van trips and a 35% improvement in last-mile efficiency, supported by shared access charging infrastructure and flexible site use.

Community-led and parish-level solutions

Description
At the community level, small-scale, locally governed charging schemes delivered by community energy groups, parish councils, or local trusts are emerging in rural and semi-rural areas where commercial CPO interest is limited. These typically comprise of small-scale installations, typically 2–6 chargers, delivered using grant funding or cooperative ownership.

Role and benefits

- Builds local ownership and trust.
- Keeps revenue within the community through reinvestment in local energy or social projects.
- Can be combined with solar PV or microgrid systems to improve rural energy resilience.
- Can make use of existing community land, village halls, or local authority car parks.
- Engagement-led design to ensure visibility, accessibility, and local ownership.
- Integration with solar PV, battery storage, or time-of-use pricing.
- Often linked to wider rural mobility or shared transport schemes.

Delivery and business models
Typical models include community benefit societies or parish-led leases supported by grant funding and local investment. Ongoing management may be provided by regional energy cooperatives.

- Grant-funded community ownership with local tariff setting.
- Leasing to CPOs under simplified concession agreements.
- Revenue reinvestment into local sustainability projects.

Case study examples
Northumberland Community Charging Project uses parish-level governance to manage chargers across rural villages, funded through a mix of community shares and LEVI support.

Boscastle's EV charging infrastructure is owned and operated by Boscastle Community Interest Company (CIC), rather than a commercial charge point operator or local authority. It represents a locally managed, community-led charging model designed to serve both residents and visitors in a remote rural location.

The *Charge My Street* programme has delivered over 100 community-owned charge points in the North West and Cumbria, demonstrating that local governance can be a powerful enabler of equitable EV access in low-demand areas.

Adaptive / pop-up trials

Description
Flexible, modular charging units are being integrated into adaptable public realm designs, often used for temporary installations, trials, or event-based activation. Typical hardware types include retractable chargers, micro-bollards, and wireless pads.

Role and benefits

- Enables data collection and resident engagement before permanent deployment.
- Minimises visual impact in sensitive areas or conservation zones.
- Supports dynamic kerbside management aligned with changing mobility needs.

Delivery and business models
Generally trialled under innovation partnerships or DfT-funded pilots, with temporary permissions and evaluation frameworks built in.

Case study example
Westminster City Council's Pop-Up Charging Pilot tested retractable kerbside chargers to evaluate user satisfaction, accessibility, and maintenance requirements before wider rollout.

Emerging solutions matrix

Table 3.5 below summarises the emerging solutions covered in this section and details the typical attributes of each across their respective user groups, power levels, place types, and delivery models.

Table 3.5: Emerging solutions matrix

Typology	Typical Users	Indicative Power	Land Type	Delivery Model	Core Benefits
Commercial & Mixed-Use Hubs	Residents, fleets, public	50–350 kW	Retail / industrial	JV / concession	Economic regeneration, high visibility
Park-and-Charge	Residents, commuters	7–22 kW	Car parks / interchanges	Concession	Affordable, scalable, uses existing assets
Mobility Hubs	Car clubs	22–150 kW	Urban centres	LA–developer partnership	Dedicated provision to support shared mobility
Shared Residential/Fleet Zones	Residents, SMEs	7–50 kW	Public or mixed	Cooperative / subscription	High utilisation, flexible models
Freight Micro-Hubs	Logistics, SMEs	150–350 kW	Industrial / edge-of-town	PPP / developer-led	Reduces city centre van trips
Community-Led Solutions	Rural residents	7–22 kW	Parish / community land	Community energy	Builds trust and rural access
Adaptive / Pop-Up Trials	Residents, visitors	Variable	Public realm	Innovation pilot	Rapid innovation

3.5.2 Emerging technologies and integration opportunities

As EV charging networks scale, attention is shifting from simple infrastructure provision to system optimisation and integration. Emerging technologies now enable charging assets to operate not as isolated installations, but as active components within wider energy, mobility and digital ecosystems. For LTAs, this presents an opportunity to reduce deployment costs, manage grid constraints, improve user experience and unlock additional value streams.

Many of the technologies outlined below are already commercially available, with varying levels of maturity, and can be incorporated into complementary charging solutions today. When deployed alongside other interventions, they support a transition from static infrastructure delivery to a more flexible, data-driven and integrated model of local energy and mobility provision.

Smart charging and load management

Overview
Smart charging enables charge points to adjust power output dynamically in response to user demand, grid conditions, or price signals. For local authorities, this technology allows a greater number of charge points to be installed within existing network constraints while reducing reinforcement costs.

Applications in complementary solutions

- *Park-and-Charge sites* can use dynamic load balancing to manage peak demand across multiple bays.
- *Shared residential and fleet zones* can optimise overnight charging schedules for mixed users, prioritising essential vehicles.
- *Freight micro-hubs* can use time-of-day tariffs to incentivise off-peak charging.

Delivery considerations
Local authorities should specify compliance with Open Charge Point Protocol (OCPP) and Open Smart Charging Protocol (OSCP) standards to ensure interoperability and flexibility for future upgrades. Collaboration with Distribution Network Operators (DNOs) is essential to align smart charging with local grid management objectives.

Battery energy storage systems (BESS)

Overview
Battery storage allows charge points or hubs to draw energy during periods when it is relatively low-cost and low-carbon and discharge it when demand peaks. For sites with limited grid capacity, storage can also enable the installation of higher-powered chargers without full connection upgrades.

Applications in complementary solutions

- *Commercial hubs* can pair storage with solar generation to reduce peak import charges.
- *Community-led schemes* can use smaller BESS units to stabilise supply and participate in local energy markets.
- *Fleet depots or shared zones* can use storage for load-shifting and resilience.

Benefits

- Lower grid connection costs and faster deployment
- Increased renewable energy utilisation
- Potential participation in flexibility and balancing services markets

Case study example
Connected Energy's E-STOR system, which uses second-life EV batteries for grid-connected charging hubs, has been deployed by local authorities and CPOs to reduce connection times and operational costs.

Renewable generation and local energy integration

Overview
Integrating renewable generation, most commonly solar PV, into charging infrastructure can reduce operational emissions, hedge against energy price volatility, and support place-based sustainability objectives.

Applications in complementary solutions

- Solar canopies at *Park-and-charge* sites or *commercial hubs* can directly power charge points or feed into on-site storage.
- *Community-led schemes* can link with local energy cooperatives or parish-level solar arrays to create circular energy economies.
- *Micro-hubs* can integrate with district energy or local microgrids to serve multiple mobility and logistics functions.

Delivery Considerations
While on-site generation reduces operational carbon, planning, grid export constraints, and roof orientation must be carefully assessed. Where direct PV integration is not viable, authorities may consider Power Purchase Agreements (PPAs) to supply charging sites with certified renewable energy.

Case study example

Stourton Park & Ride on the outskirts of Leeds is the UK's first fully solar-powered park-and-ride, featuring solar carports, battery storage, and electric vehicle charging stations. The project showcases how renewable energy can be integrated into public transport infrastructure, reducing reliance on the grid and promoting sustainable travel through modal shift.

Digital platforms and data interoperability

Overview
Digital platforms can be leveraged to underpin efficient operation and a high-quality user experience by providing real-time visibility of utilisation, maintenance status, and displaying pricing information. Interoperability and open data standards are critical to ensure network reliability and future integration with additional partners and Mobility-as-a-Service (MaaS) systems.

Applications in Complementary Solutions

- *Shared fleet/residential zones* can use digital scheduling tools to manage user bookings and access control.
- *Community charging models* benefit from data on usage and revenue distribution.
- *Commercial hubs* can integrate with logistics software to plan fleet charging dynamically.

Future direction
AI-based predictive analytics will enable proactive maintenance, optimal pricing strategies, and demand forecasting, helping LTAs to plan expansion based on data-driven insights rather than reactive user feedback.

Best practice frameworks

- *Open Charge Point Interface* (OCPI) for roaming and tariff transparency.
- *DfT's National Charge point Registry* (NCR) compliance for all public installations.
- *LAEP+ integration* for linking transport demand and energy data.

Vehicle-to-grid, Vehicle-to-Everything, and bi-directional charging

Overview
Bi-directional charging allows EVs to discharge energy back to the grid or local buildings, transforming vehicles into distributed energy assets. While still at early commercial stages, V2G and V2X are gaining attention as fleets electrify and battery costs fall.

For an EV owner, this means the vehicle can export stored energy back to the home, a building, or the wider grid. In practice, a driver plugs in as normal, but a smart charger and energy tariff manage the flow automatically, exporting energy when grid electricity is most expensive and recharging when it is cheapest. For most drivers, this would be largely invisible, managed in the background around their schedule to ensure the vehicle charged when they need it.

V2G refers specifically to export back to the public electricity network; V2X is broader, covering vehicle-to-home (V2H), vehicle-to-building (V2B), and vehicle-to-load (V2L) applications where energy is used locally.

Applications in complementary solutions

- *Shared fleet charging zones* could provide flexibility services to DNOs.
- *Community charging sites* could support resilience in rural areas or critical facilities.
- *Park-and-charge* schemes may pilot V2G with residential users through aggregated services.

Challenges

- Standardisation (CHAdeMO vs. ISO 15118) and hardware availability remain barriers.
- Business models depend on energy market access and aggregation frameworks.
- Long-term battery health impacts must be closely monitored.

Case study example
The *Electric Nation V2G* project demonstrated how domestic and fleet users could provide grid services without compromising mobility needs, offering a blueprint for future integration in local networks.

Integration with broader mobility and energy systems

Overview
Complementary charging infrastructure will increasingly be embedded within a wider energy-mobility ecosystem, integrating transport, property, and utility functions.

Integration opportunities

- *Multi-modal hubs* combining EV charging, e-bike/scooter hire, and public transport access.
- *Smart city data platforms* linking EV charging demand with air quality, parking, and traffic management systems.
- *Energy system coordination* through LAEPs, ensuring charging rollout aligns with renewable generation and flexibility markets.

Strategic value
Integrating complementary charging with other public realm and infrastructure

investments enables co-benefits such as improved air quality, digital inclusion, and local regeneration, while maximising return on public funds.

Summary of emerging integration opportunities

Table 3.6: Summary of emerging integration opportunities

Technology	Application Area	Benefit	Maturity Level (2025)
Smart Charging	All typologies	Grid efficiency, cost savings	High
Battery Storage	Hubs, fleet zones	Grid resilience, cost control	Medium
Solar Integration	Hubs, community sites	Low-carbon energy, visibility	High
Digital Platforms	Shared, park-and-charge	Transparency, data optimisation	High
V2G / Bi-Directional	Fleet, community	Grid flexibility, resilience	Low–Medium
Mobility & Energy Integration	Hubs, LAEPs	System-level benefits	Medium

3.5.3 Emerging business and governance models

Delivering complementary EV charging solutions requires local authorities to navigate a complex mix of funding, ownership, and operational arrangements. Emerging business models balance risk, revenue, and control, enabling LTAs to expand access while minimising capital outlay and ensuring long-term sustainability.

This section outlines the key models, practical considerations, and UK-based examples.

Public ownership with managed operations

Description
Under this model, the local authority retains ownership of the charge points and associated land, while contracting a Charge Point Operator (CPO) to manage installation, maintenance, and customer access.

Advantages

- Maximum local control over siting, pricing, and accessibility
- Simplified integration with planning and transport strategy
- Transparent reporting and accountability

Challenges

- Requires upfront capital investment from the council or grant funding
- Long-term operational management remains the council's responsibility
- May be less commercially attractive to private partners without guaranteed revenue

Case study example
Oxford City Council Park & Charge sites are operated under council ownership, with contracted CPOs providing day-to-day maintenance and billing services.

Concession and revenue-sharing models

Description
A concession arrangement allows a private operator to finance, install, and operate charging infrastructure for a fixed period, often 10–15 years, in exchange for a share of revenues. The local authority typically retains ownership of the land and oversees compliance with access, pricing, and service standards.

Advantages

- Shifts capital and operational risk to the private partner
- Leverages commercial expertise for site management and technology upgrades
- Potential for innovation in tariff structures, digital platforms, and ancillary services

Challenges

- Revenue is shared, so the council may earn less than under direct operation
- Long-term flexibility is reduced; renegotiation of terms may be required for technology upgrades
- Requires robust legal and commercial frameworks to protect public interest

Case study example
West Midlands Combined Authority has used concession models for park-and-charge and mobility hubs, with private operators responsible for installation, maintenance, and user billing.

Anchor-tenant and co-investment models

Description
Anchor-tenant models rely on a primary user (often a fleet operator or commercial tenant) to underwrite demand and capital costs, while other users can access the same infrastructure under secondary agreements. Co-investment approaches can combine public funds, private investment, and developer contributions.

Advantages

- Reduces risk for public sector partners by guaranteeing minimum utilisation
- Encourages private-sector participation in under-served areas
- Can accelerate deployment in commercial or mixed-use sites

Challenges

- Requires careful negotiation to balance competing user needs
- Tariff structures must be transparent to avoid cross-subsidisation disputes
- Contracts must anticipate potential changes in the anchor tenant's fleet or operations

Case study example
The *Oxford Energy Superhub* combines anchor-tenancy from fleet operators with public access for residents and visitors, generating a diversified revenue stream while reducing reliance on subsidies.

Community-led and cooperative ownership models

Description
Community-led models are typically suitable for rural, semi-urban, or low-demand areas where commercial operators are unwilling to invest. Local groups, parish councils, or cooperatives own and operate charging infrastructure, often leveraging grant funding and volunteer management.

Advantages

- Builds trust, local engagement, and social licence
- Keeps revenue within the community for reinvestment in local sustainability projects
- Can target equity and accessibility objectives effectively

Challenges

- Scale is limited; site density may be low
- Professional operations, maintenance, and billing services may still require external contractors
- Funding cycles can be short-term, requiring ongoing grant or subsidy support

Case study example
The *Northumberland Community Charging Project* demonstrates how cooperative models can provide equitable EV access in rural areas using LEVI and local funding.

Hybrid and innovation partnership models

Description
Hybrid models combine elements of public ownership, concession, anchor-tenant, and co-investment approaches. They are often used in *pilot projects, mobility hubs, and regeneration schemes*, where risk, revenue, and control are shared.

Advantages

- Flexibility to adapt to local context, grid capacity, and user mix
- Encourages innovation in technology integration, tariffs, and services
- Can unlock funding from multiple sources, including LEVI, developer contributions, and private capital

Challenges

- Governance and contractual arrangements are complex
- Requires high-quality project management and stakeholder coordination
- Success depends on early clarity on responsibilities, risk allocation, and long-term objectives

Case study example
Coventry Mobility Hub pilot combined local authority funding, developer contributions, and private-sector CPO operation. The arrangement allowed the hub to support fleet, public, and shared mobility users while integrating smart charging and digital access platforms.

Summary

Table 3.7 below summarises the governance models presented in this section.

Table 3.7: Summary of governance models

Model	Description	Advantages	Challenges	Example
Public Ownership	Council owns, contracts CPO	Maximum control	Capital cost, operational responsibility	Oxford Park & Charge
Concession / Revenue-Sharing	Private operator invests & operates	Shifts risk, drives expertise	Revenue sharing, long-term flexibility	West Midlands Park & Charge
Anchor-Tenant / Co-Investment	Primary tenant underwrites demand	Reduced risk, faster deployment	Contract complexity, balancing needs	Oxford Energy Superhub
Community / Cooperative	Local group owns & operates	Builds local trust, keeps revenue local	Limited scale, professional operations	Northumberland Community Charging
Hybrid / Innovation Partnership	Mix of above, multi-stakeholder	Flexible, encourages innovation	Complex governance	Coventry Mobility Hub

3.5.4 Evaluation framework and decision pathways

The deployment of complementary EV charging solutions involves balancing multiple, sometimes competing, factors including user demand, operational feasibility, grid capacity, cost, and community benefit. A structured evaluation framework helps local authorities make evidence-based decisions, prioritise sites and typologies, and sequence investments for maximum impact.

This section sets out a practical approach to evaluating complementary solutions, supported by decision matrices and indicative performance criteria.

Core evaluation criteria

Provides an evaluation matrix for comparing typologies based on land use, energy availability, user need, and deliverability. A robust evaluation framework considers the following key dimensions in the table below.

Table 3.8: Core evaluation criteria

#	Evaluation criteria	Aspects to be assessed
1	Demand and user needs	• Existing EV ownership and projected growth • Residential access constraints (e.g., street parking availability) • Local business and fleet requirements, including freight and service vehicles
2	Operational feasibility	• Site accessibility, vehicle manoeuvrability, and safety • Planning and permitting constraints • Maintenance and operational access
3	Energy and grid considerations	• Local network capacity and reinforcement requirements • Potential for renewable generation or energy storage • Integration with smart charging and future upgrades
4	Financial viability and funding	• Capital and operational costs • Revenue potential and cost recovery (tariffs, partnerships, grants) • Co-investment or concession arrangements
5	Community and environmental impact	• Visual and streetscape integration • Air quality and noise benefits • Equity of access for low-income and mobility-restricted users
6	Strategic alignment	• Alignment with Local Transport Plan (LTP) objectives • Contribution to LEVI delivery or other national funding targets • Support for decarbonisation, mode shift, and local energy planning

Decision pathway for typology selection

The decision pathway below provides an ordered approach for selecting the most appropriate complementary solution for each site or area.

1. **Map potential sites** – Identify all candidate locations, including public land, private partnerships, and underused parking facilities.
2. **Screen against feasibility** – Assess site access, planning constraints, grid capacity, and safety considerations.
3. **Analyse demand** – Evaluate usage by residents, fleets, and commercial operators.
4. **Match typology to context** – Align each site with the typology most suited to its demand profile, land characteristics, and operational requirements (see Section 3).
5. **Evaluate business model options** – Determine the most appropriate governance, funding, and operational model (see Section 5).
6. **Prioritise based on multi-criteria scoring** – Score sites against demand, feasibility, cost, and strategic alignment to rank investment and deployment sequence.
7. **Plan for pilot or phased rollout** – Select early-stage pilots to test assumptions, gather data, and refine models before wider deployment.

Furthermore, the roadmap on the next page (Table 3.9) sets out a more detailed approach to defining and scaling pilots once an intervention has been selected.

Table 3.9: Roadmap and phasing

Phase	Timescales	Objectives	Key activities	Expected outcomes
Phase 1: Preparation and Early Pilots	0–12 Months	• Establish governance structures and stakeholder engagement • Identify candidate sites for pilot deployment • Define monitoring, evaluation, and reporting frameworks	1. **Stakeholder Engagement:** Bring together LA departments, CPOs, DNOs, fleet operators, and community groups. 2. **Site Identification:** Map potential locations for park-and-charge, shared zones, and micro-hubs. 3. **Pilot Design:** Select 2–5 pilot sites representing a mix of urban, suburban, and rural contexts. 4. **Technology Integration:** Deploy smart chargers, digital management platforms, and optional renewable generation or storage solutions. 5. **Funding Alignment:** Secure early-stage funding via LEVI, local authority budgets, or innovation grants.	• Verified assumptions on demand, utilisation, and operational feasibility • Initial evidence base for typology suitability and business model effectiveness • Refined site selection criteria and multi-criteria scoring methodology.
Phase 2: Expansion and Scaling	12–36 Months	• Scale deployment based on pilot results • Implement multi-site typologies and diverse business models • Integrate complementary charging into wider transport and energy networks	1. **Network Rollout:** Deploy additional park-and-charge facilities, mixed-use hubs, and freight micro-hubs based on prioritisation scores. 2. **Business Model Deployment:** Implement concession, anchor-tenant, and co-investment models across new sites. 3. **Technology Enhancement:** Integrate battery storage, smart charging, and digital platforms network-wide; evaluate V2G feasibility where relevant. 4. **Stakeholder Coordination:** Maintain alignment with local transport, planning, and energy strategies. 5. **Community Engagement:** Continue consultation to ensure equitable distribution and visibility of infrastructure.	• Operational complementary network serving diverse users • Business models tested and optimised for revenue, cost, and community benefit • Evidence base for broader strategic deployment and long-term planning.

Phase 3: Consolidation and Full Network Integration	36–60 Months	• Transition from pilot and incremental expansion to full network maturity • Align infrastructure with long-term decarbonisation and mobility strategies • Optimise operational efficiency and financial sustainability	1. **Network Optimisation:** Adjust capacity, typology mix, and siting based on utilisation and performance metrics. 2. **Advanced Integration:** Incorporate renewables, energy storage, V2G, and mobility hub functions into the network. 3. **Governance Refinement:** Review and adjust contracts, concession arrangements, and community partnerships. 4. **Policy Alignment:** Embed complementary charging solutions into LTPs, planning policies, and zero-emission transport strategies. 5. **Evaluation and Reporting:** Maintain continuous monitoring and reporting to inform future investment decisions and LEVI or grant funding applications.	• Fully operational, strategically aligned complementary charging network • Evidence-driven understanding of user demand, technology performance, and operational cost-efficiency • Framework established for ongoing expansion, technology upgrades, and integration with future mobility innovations.

4 Summary and Recommendations

This section draws together the findings from the report in three sets of recommendations:

- **Section 4.1** summarises the key evidence and conclusions.
- **Section 4.2** sets out practical guidance for LTAs providing structured, decision-ready recommendations that authorities can apply directly to their own programmes using the frameworks developed in this report.
- **Section 4.3** identifies policy recommendations where action above the local level by national government, TfSE, or other bodies would materially improve delivery outcomes.

Section 4.4 closes with next steps for both LTAs and TfSE. Each subsection can be read independently depending on where your priorities lie.

4.1 Summary of key findings

This study has brought together evidence from policy reviews, stakeholder engagement, Local Transport Authority (LTA) survey responses, and technical assessment of on-street charging solutions to identify the main barriers and enablers to delivery at pace and at scale. Across all sections, a consistent set of themes has emerged.

Variation in local context

LTAs operate within highly variable physical, institutional, and political environments. Differences in street typologies, parking pressure, utilities capacity, governance structures, and internal capability significantly affect what can be delivered, how quickly, and at what cost. This reinforces the need for flexible, context-sensitive approaches rather than prescriptive solutions.

Administrative and governance complexity

Multiple approval processes, overlapping controls, and inconsistent interpretations of national guidance increase costs and risk for both LTAs and charge point operators. These burdens are particularly acute for smaller authorities and can discourage investment in locations with lower commercial returns.

Standards and guidance are not always easy to apply on-street

National standards relating to safety, accessibility, and design provide an essential baseline. However, applying these consistently in constrained on-street environments

often requires judgement and trade-offs. The absence of shared interpretation leads to cautious decision-making delays, and inconsistent outcomes between authorities.

Equity and accessibility are widely supported but unevenly embedded

There is strong consensus that on-street charging must support residents without off-street parking, disabled users, and commercial drivers who rely on public charging. In practice, however, these considerations are not always systematically reflected in site selection, scheme design, or procurement processes, risking uneven access across places and user groups.

Taken together, these findings point to the need for clearer pathways, proportionate decision-making frameworks, and stronger sub-regional coordination, supported by practical tools rather than additional layers of policy.

4.2 Practical guidance for local transport authorities

The guidance developed through this study has been deliberately structured around readiness and progression, recognising that LTAs are at different stages of maturity.

Rather than prescribing a particular delivery model, this guidance has been designed to help LTAs to:

- Understand their current position across strategy, governance, technical capacity, and market engagement.
- Identify the most appropriate next steps based on local constraints and opportunities.
- Reduce delivery risks by addressing known barriers early in the process.

Key elements of the guidance include:

- Readiness pathways that help authorities prioritise actions depending on whether they are at an early, developing, or scaling stage of delivery.
- Decision-support tools to guide the selection of on-street charging typologies based on street characteristics, user needs and risk.
- Process prompts and checklists to support more efficient navigation of approvals and controls.
- Embedded equity and accessibility considerations, ensuring these are treated as core design requirements.

The guidance is designed to be iterative and adaptive. LTAs are encouraged to revisit and refine the toolkit as schemes progress, lessons are learned, and external conditions (such as funding or standards) evolve.

4.3 Policy recommendations

While many challenges can be addressed locally, this study identified several areas where coordinated policy action would significantly improve delivery outcomes.

Harmonising controls and interpretation

- Promote shared interpretations of how national standards and guidance should be applied in on-street contexts, particularly where constraints require trade-offs.

- Encourage greater consistency across highway authorities to reduce uncertainty for operators working across multiple areas.

Reducing administrative burden

- Streamline approval processes by identifying opportunities for standardisation, clearer delegation, and parallel rather than sequential decision-making.
- Support the use of standard templates, design assumptions, and approval pathways to reduce duplication of effort.

Treat the kerbside as a managed, multi-use asset

- On-street charging should sit within a wider kerbside management framework, acknowledging competing demands such as loading, servicing, taxis, blue badge parking, and short stay activity.
- Charging should not be treated as a fixed, single-use allocation of space.

Supporting equitable access

- Embed accessibility and inclusion explicitly within policy, funding criteria, and programme objectives.
- On-street residential charging should be prioritised in areas with high proportion of households without off-street parking and limited access to alternatives.
- Improve data sharing and transparency so that users can understand not just where charge points are located, but also how accessible they are.

These recommendations are intended to strengthen the connection between national ambition and local delivery, without undermining the flexibility needed to respond to place-specific conditions.

4.4 Next steps

Emerging on-street EV charging solutions offer local authorities a versatile, cost-effective route to expand EV access, support fleets, and achieve decarbonisation objectives. This section brings together three distinct types of recommendation.

1. Strategic recommendations are directed at LTAs and set out practical actions to support effective rollout, structured around the decision frameworks developed in this report.
2. Policy recommendations identify areas where coordinated action above the local level by government, Transport for the South East, or other bodies — would materially improve delivery outcomes.
3. Next steps provide a consolidated action list for authorities looking to move quickly on the areas covered in this report. Each can be read independently, depending on where an authority's priorities lie.

4.4.1 Strategic recommendations

This section sets out six strategic actions that local authorities can take to support effective rollout of a plan to address the charging divide between off-street and on-street EV charging.

Each recommendation follows the structure below:

- **What the research found:** the evidence from stakeholder engagement, LTA surveys, and technical assessment that gives rise to the recommendation.
- **Which framework to use:** the specific analytical tool or decision-support framework developed in this report that addresses the finding.
- **The decision logic:** a worked explanation of how the framework connects to action, including conditional logic ('if your situation is X, then the implication is Y') that helps officers apply the framework to their own context.
- **What to do next:** clear actions, each tied to specific sections, tables, or appendices in this report.

The six strategic recommendations above are sequenced to reflect the order of decision-making. In practice, however, the right starting point will vary between authorities depending on where they currently are in their delivery journey.

Appendix D provides a structured readiness framework to help officers locate their authority's current position and identify the most relevant next steps. It is organised around seven dimensions (strategy and policy, kerbside controls and TROs, D-TRO and kerbside data maturity, enforcement capacity, procurement and commercial arrangements, accessibility and inclusion, and emerging solutions readiness) and maps each against three maturity stages: Early, Developing, and Scaling.

Most authorities will show a mixed profile across these dimensions. The framework is designed to be used dimension by dimension, so officers can focus on the areas where gaps are greatest. Each maturity stage includes priority actions tied directly to the frameworks and tools in this report.

A self-assessment summary table is also included to help authorities identify their overall readiness profile at a glance, and to structure conversations with TfSE about where regional support would be most useful.

Recommendation 1: Define your delivery approach before selecting hardware

Recommendation 1: Define your delivery approach before selecting hardware

What the research found

LTA interviews show that this is not as a unified delivery model, and each authority is at various stages of maturity. Instead, local authorities adopt distinct approaches shaped by political context, kerbside pressure, asset ownership, and internal capacity. Consequently, most do not sit neatly in one category across all aspects of delivery: an authority may be mature in procurement but cautious on kerbside controls.

Which framework to use

Authority delivery taxonomy (Section 2.3) and the five-step approach selection method

How to decide

If your current rollout is driven primarily by what LEVI funding permits and which CPO is available, rather than by a deliberate choice about what outcomes you are optimising for, there is a risk of policy drift. This could lead to inconsistent decisions across sites, difficulty defending choices in consultation, and a pipeline that does not build towards a coherent network.
The taxonomy outlines three recognisable approaches derived from the LTA engagement:

- Cautious/low-conflict rollout
- Scaled residential network building
- Targeted/use-case-led

These approaches can be combined by place type. The selection method then provides a structured route to choosing which approach applies where, grounded in kerbside conditions, enforcement capacity, and political context.
The output is a short, documented position that says: 'In residential streets, we are adopting approach X for these reasons. In town centres, we are adopting approach Y.'
This becomes the basis on which subsequent hardware, TRO, and procurement decisions are made.

What to do next

1. Work through the five selection steps in Section 2.3 with your delivery team. The most important step is Step 1 (clarify objectives) as it is where you will choose whether the next phase of rollout is primarily about equity/coverage, pace/acceptability, utilisation, or public realm protection.
2. Map your current pipeline against the three taxonomy categories. Identify where you are already operating in a particular mode by default, and whether that is the right mode for those locations.
3. For each of your delivery contexts (residential, town centre, transport hub, fleet/taxi, etc), assign an approach and document the rationale. Use this as a standing reference for site selection and consultation.

Recommendation 2: Match infrastructure to the combined needs of users and street environments, not just ease of installation

Recommendation 2: Match infrastructure to the combined needs of users and street environments, not just ease of installation

What the research found

The charger typology assessment shows that no single hardware type performs well in all contexts. User requirements (charging speed, dwell time, accessibility, vehicle footprint) interact with environmental constraints (kerb space, footway width, parking pressure, street heritage) to produce distinct suitability profiles for different user-environment combinations. In practice, many authorities are defaulting to a single hardware type, typically lamppost chargers, across all contexts because it is the most repeatable, even where it may not be the most effective.

Which framework to use

Charger typology matrix (Section 2.4.4), Figure 2.7, Appendix A), user-environment interface matrix (Table 2.9, Appendix C), and hardware summary table (Table 2.8)

How to decide

The typology matrix cross-references four user types (LCV, disabled user, private car, taxi/PHV) against three on-street environments (urban centre, urban residential, suburban residential) to indicate which hardware typologies are well suited to each combination. This does not mean every authority needs every typology. Rather, it provides a structured basis for deciding where a single approach is sufficient and where the user mix demands something different.
For example, if your priority residential streets have multiple take-home commercial vehicles, the matrix indicates that lamppost conversions alone may not provide sufficient power or predictable enough access. Pedestals or post-mounted chargers with time-of-day controls may be more appropriate, or a nearby off-street community charging hub may be considered. Conversely, in suburban residential areas with long dwell times and low kerbside pressure, lamppost conversions may be the right fit.
The point is to make these judgements explicitly, rather than discovering the mismatch after deployment when utilisation is poor or user complaints emerge.

What to do next

1. For each delivery context in your pipeline, identify the dominant user types using the characteristics in Figure 2.5 and the environmental constraints from Figure 2.6.
2. Apply the typology matrix (Figure 2.7/ Appendix A) to check whether your planned hardware type is well suited to the user-environment combination at that location. Where the matrix suggests a different typology, assess whether the cost and operational implications are justified.
3. Use the hardware summary table (Table 2.8) and the detailed technical comparison in Appendix B to compare the installation cost, maintenance, accessibility, and non-user impact characteristics of alternative typologies before committing to procurement.

Recommendation 3: Assess kerbside control and enforcement readiness before committing to managed approaches

Recommendation 3: Assess kerbside control and enforcement readiness before committing to managed approaches

What the research found

The research consistently found that delivery performance is constrained by governance and kerbside management rather than charger technology. Parking controls are described by LAs as the most sensitive constraint, shaping both appetite for TROs and the type of restrictions applied.
Some authorities have shifted away from TROs for newer deployments to maintain pace, while others have faced significant opposition when introducing dedicated EV bays. Enforcement capacity varies widely, particularly where county/district responsibilities are split.

Which framework to use

The five-step approach selection method (Section 2.3.2, particularly steps 2 and 3), the DKM readiness assessment (Section 3.2.4), and D-TRO platforms by LA (Section 3.2.4, Table 3.4*)*

How to decide

For DKM, there is a dependency chain: it depends on integrated enforcement, which depends on D-TRO coverage, which depends on basic TRO data quality. Attempting to implement DKM or bookable charging bays without confirming each link in this chain leads to schemes that cannot be enforced credibly, which in turn undermines user confidence and public acceptability.
The selection method's step 2 ('let kerbside conditions determine the level of control') and step 3 ('align choices with enforcement and governance capacity') provide a framework for this decision. If enforcement is fragmented or absent, strategies that depend on tight compliance will not work, regardless of how well-designed the infrastructure is.
The D-TRO mapping in Table 3.4 provides a starting point for assessing where your authority sits. If you are not yet on a D-TRO platform, interventions that depend on digital restriction data (DKM, booking-led enforcement) are not feasible in the near term, and the priority should be to close that gap.

What to do next

1. For each delivery context in your pipeline, identify the dominant user types using the characteristics in Figure 2.5 and the environmental constraints from Figure 2.6.
2. Apply the typology matrix (Figure 2.7/ Appendix A) to check whether your planned hardware type is well suited to the user-environment combination at that location. Where the matrix suggests a different typology, assess whether the cost and operational implications are justified.
3. Use the hardware summary table (Table 2.8) and the detailed technical comparison in Appendix B to compare the installation cost, maintenance, accessibility, and non-user impact characteristics of alternative typologies before committing to procurement.

Recommendation 4: Treat accessibility as a fundamental design and procurement requirement, not a compliance exercise

Recommendation 4: Treat accessibility as a fundamental design and procurement requirement, not a compliance exercise

What the research found

Stakeholder engagement found that installations may meet individual PAS 1899 requirements yet still be unusable because the overall user journey has not been designed holistically. Cable handling, bay geometry, level access, and the needs of passengers (not just drivers) are all identified as persistent gaps.
Disabled motorists are more likely to plan journeys in advance, and reliability issues amplify anxiety. Predictable, bookable access was strongly supported by disability stakeholders.

Which framework to use

*Accessibility enablers (Section 2.2.4), emerging accessibility solutions (Section 2.2.5), and the charger typology accessibility ratings (*Table 2.8*,* Appendix B*)*

How to decide

The implication of the stakeholder findings is that accessibility cannot be addressed by specifying compliant hardware and assuming the outcome will be adequate. The user journey extends from identifying a charger online, through navigation, bay approach, vehicle positioning, cable handling, payment, and departure. A failure at any point in this chain makes the installation inaccessible in practice, regardless of what the technical specification says.
This means accessibility expectations need to be embedded in three places:

- **Procurement**: specifying not just equipment but siting, bay layout, and cable management requirements
- **Data transparency:** publishing accessibility features so users can filter before travelling
- **Operational monitoring:** auditing installed infrastructure against the full user journey, not just hardware compliance.

The typology comparison in Table 2.8 and Appendix B provides a starting point for understanding which hardware types perform better or worse on accessibility. However, the report's key insight is that the surrounding environment matters as much as the hardware: a well-specified pedestal charger in a poorly designed bay is still inaccessible.

What to do next

1. Embed the three summary recommendations from Section 2.2.5 into your procurement framework: accessible heights and orientation rules, data transparency requirements, and a commitment to periodic auditing.
2. Review existing installations for the 'quick wins' identified in Section 2.2.5: clearer signage, prominently displayed accessible instructions, and correction of avoidable installation errors such as poor orientation or excessive set-back from the kerb.
3. For new deployments, assess each candidate site against the full user journey (approach, manoeuvring, connection, payment, departure), not just hardware compliance. Consider whether bookable accessible bays aligned with adjacent charge points (Section 2.2.5) could improve predictability for disabled users in high-pressure locations.

Recommendation 5: Use shared and complementary solutions to relieve pressure on the kerb, not replace it

Recommendation 5: Use shared and complementary solutions to relieve pressure on the kerb, not replace it

What the research found

Shared domestic charging, shared depot charging, and off-street complementary solutions (park-and-charge, commercial hubs, mobility hubs, micro-hubs) can all reduce the volume of public on-street charging needed. However, each has specific enabling conditions:

- Shared domestic charging depends on trust between the host and users, platform interoperability, and regulatory clarity.
- Shared depot charging depends on security arrangements, metering systems, and willingness to collaborate across organisational boundaries.
- Complementary off-street solutions depend on land availability, grid capacity, and viable governance models.

Which framework to use

Shared domestic charging enablers and barriers (Section 3.3.2), shared depot charging assessment (Section 3.4), emerging solutions matrix (Table 3.5), governance models summary (Table 3.7), and evaluation framework (Section 3.5.4, Table 3.8)

How to decide

Part 2 serves as an assessment of where each approach is viable and what has to be true for it to work effectively. The enabling conditions identified through stakeholder engagement provide a checklist against which authorities can assess local feasibility before committing resources. For example, shared domestic charging (via Co-Charger) is most effective where hosts can be matched to regular users within a short walking distance.

Similarly, shared depot charging (via Paua Share) is only viable where depot operators are willing to grant third-party access under managed conditions. The First Bus framework of 'inside/flex/outside the fence' provides a useful lens for and initial assessment of which depots in your area might be candidates.

The governance models in Table 3.7 then help determine which commercial arrangement fits each complementary solution: public ownership for park-and-charge on council land, concession models for commercial hubs, co-investment for anchor-tenant-led shared zones, and community ownership for parish-level rural sites.

What to do next

1. Identify where your on-street charging pipeline faces acute constraints (grid capacity, kerbside saturation, political opposition) and assess whether any of the complementary solutions in Table 3.5 could address those constraints at those specific locations.
2. For shared domestic charging, engage with platform providers to assess local coverage and user demand. Consider whether a targeted awareness campaign or small grant scheme (as suggested by Co-Charger in Section 3.3.2) could stimulate uptake in areas where public on-street provision is sparse.
3. For shared depot opportunities, use the evaluation criteria in Table 3.8 to screen potential sites and the governance summary in Table 3.7 to identify the appropriate commercial model. Start with public sector depots (council fleet, emergency services) where collaboration motivations are strongest.

Recommendation 6: Pilot dynamic kerbside management where the operational case is strongest, not where it is easiest

Recommendation 6: Pilot dynamic kerbside management where the operational case is strongest, not where it is easiest

What the research found

DKM is technically credible and commercially plausible, but real-world deployment applied to EV charging remains very limited. Within the TfSE area, no established, fully operational DKM schemes for EV charging bays were identified.
The strongest use case is commercial and fleet activity in mixed-use areas where kerbside conflict is actively constraining charging outcomes. Residential lamppost contexts are more complex: they often lack defined TRO-based bays, and booking-led control can be harder to communicate and enforce.

Which framework to use

DKM practical guidance (Section 3.2.5), D-TRO platform mapping (Table 3.4), DKM day-part visualisation (Section 3.2.3, Figure 3.1–3.3), and the commercial readiness assessment (Section 3.2.4)

How to decide

The temptation with DKM is to pilot it in locations where the technology is simplest to deploy (e.g. a few bays in a well-controlled car park). But the report's evidence points clearly to places where kerbside friction is currently suppressing the effectiveness of existing charging infrastructure, or where the need to maintain access for non-charging kerbside uses (loading, servicing, accessible parking) is preventing new charging from being installed at all.
The visualisation of use throughout the day (*Figure 3.1–3.3*) illustrates how a single stretch of kerb that serves deliveries in the morning, public charging and Blue Badge access in the afternoon, and outdoor hospitality in the evening. The three scenarios describe real kerbside management challenges that interviewees raised, particularly in town centres and mixed-use high streets.
Piloting in these locations generates the strongest evidence of value (demonstrable improvement in utilisation, reduction in conflict, commercial willingness to pay for bookable access) and builds the operational learning needed to scale DKM into other contexts later.

What to do next

1. Identify two to three locations where kerbside conflict is demonstrably constraining charging outcomes: persistent ICEing, low utilisation despite high local demand, or inability to install charging due to competing kerbside needs.
2. Work through the four DKM specification points in Section 3.2.5: start with the right locations, confirm the legal/data baseline, implement booking and entitlement with clear enforcement, and tailor the commercial model to local objectives.
3. Design pilots with clear evaluation metrics that test the propositions from the stakeholder engagement: does bookable access improve utilisation? Does enforcement integration reduce ICEing? Is there commercial willingness to pay for assured kerbside access among fleet operators? Use these findings to build the case for scaling.

4.4.2 Operational next steps

In addition to the strategic actions above, Table 4.1 below sets out the more immediate next steps which can position LTAs to make tangible progress towards delivering more equitable on-street charging provision

Table 4.1: Operational next steps

Recommendation	Description
1. Stakeholder mapping and engagement	• Identify all relevant internal and external stakeholders, including CPOs, DNOs, IDNOs, fleet operators, developers, and community groups. • Establish governance and decision-making structures for project delivery.
2. Site identification and feasibility screening	• Map candidate locations across public and private land. • Conduct preliminary feasibility assessments for accessibility, planning constraints, grid connection, and operational viability.
3. Pilot design and deployment	• Select early-stage pilots representing diverse typologies and user groups. • Define monitoring, evaluation, and reporting metrics to inform scaling decisions.
4. Funding and partnership development	• Align pilot and early deployment with LEVI, local budgets, developer contributions, and potential private investment. • Negotiate commercial arrangements that balance risk, revenue, and long-term flexibility.
5. Data and performance monitoring	• Implement digital platforms to capture utilisation, energy consumption, revenue, and user satisfaction. • Use data to optimise operations, inform business models, and refine site selection for future phases.

4.4.3 Key success factors

Finally, across all elements of delivery, the key success factors below provide an overarching set of principles which should be adhered to:

- **Flexibility:** Ensure modular, scalable infrastructure and adaptable business models.
- **Collaboration:** Maintain active engagement with CPOs, fleets, communities, and energy partners.
- **Evidence-led decision making:** Use data from pilots and early deployments to guide scaling and typology adjustments.
- **Strategic alignment:** Embed complementary solutions within local transport, energy (LAEP and RESP), and regeneration strategies.
- **Equity and accessibility:** Prioritise locations and models that improve access for residents without home charging and under-served communities.

Appendices

Appendix A

Charging typology matrix

Table A.1: Charger typology matrix

		User type			
		LCV *Strong prioritisation of time efficiency and reliability over charging cost*	**Disabled user** *Accessibility and reliability must be prioritised over throughput and kerb efficiency*	**Car** *Proximity and simplicity is valued; a balance between convenience and turnover*	**Taxi/PHV** *Prioritisation of charging speed, predictability, and uptime over cost*
Environment	On-street urban centre *High-demand, space-constrained kerbside environment*	**Integrated dual purpose** • Can support rapid/ultra-rapid charging in commercially active areas • Can be located near logistics and servicing hotspots • Kerb footprint efficiency • Revenue models help justify prime street space	**Pedestal** • Fixed, visible, predictable location (more important than invisibility in this context) • Can be designed to universal reach heights • Supports proper cable management • Easy to pair with designated (important given that in urban	**Integrated dual purpose** • Delivers fast top-ups during short urban stops • Compact design limits public realm intrusion • Advertising or dual use offsets low predictability of individual use (car demand is more variable/opportunistic than e.g. LCVs)	**Integrated dual purpose** • Supports rapid top-ups aligned with high daily mileage and limited downtime • Consolidated footprint reduces kerb pressure in busy taxi operating zones • Advertising or multifunctional features help justify use of premium street space

		Other suited typologies: Small rapid charging hubs near delivery hotspots	centres enforcement is already challenging) accessible bays • No interaction with footway beyond the bay Other suited typologies: Wall-mounted (would need to avoid cable crossing pedestrian space)	Other suited typologies: small rapid charging hubs near car parks/transport nodes or edges of pedestrian zones	where taxi demand is continuous but dispersed
	On-street urban residential *Variable parking pressure, longer dwell times, and strong equity and fairness considerations.*	**Pedestal** • Fixed, predictable location near vehicle base • Supports overnight or long-dwell charging • Can be designed for larger vehicles • Clear allocation reduces conflict • However, visual impact and restrictions times would need to be carefully managed Other suited typologies: post mounted	**Post mounted** • High accessibility when well designed (can be designed to be immediately adjacent to kerbside) • Predictable location, which works well with overnight dwell and routine use Other suited typologies: flush pop-up (if low force and intuitive)	**Lamppost conversion** • Minimal additional street furniture; fits naturally into residential streetscapes • Cost-effective and quick to deploy • Suitable for long dwell charging • Scalable: highly scalable where the existing lighting network aligns with charging demand but structurally constrained elsewhere. Other suited typologies: cross-pavement solutions (buried/overhead gantries, pop-up)	**Pedestal** • More robust than post mounted chargers for frequent use • Can deliver higher energy overnight than lamp-post conversions • Fixed location supports predictability • Easier to apply time-of-day or permit controls ie. To control perception of commercial capture from residents Other suited typologies: Wall-mounted chargers

	On-street rural residential *Low-density kerbside environment with long dwell times, limited alternatives, and high reliance on local charging reliability.*	**Pedestal** • Robust and reliable for frequent use • Sufficient power for overnight LCV charging • Easier to maintain and service • Clear, predictable location Other suited typologies: post mounted	**Post mounted** • Highly controllable mounting height and interface layout • Stable, predictable location close to home • Strong reliability when lightly shared or semi-private Other suited typologies: pedestal if paired with accessible bays	**Post mounted** • Small footprint suits rural streets • Adequate power for long dwell charging • Lower cost per unit supports wider coverage Other suited typologies: wall-mounted	**Pedestal** • More robust than bollards for frequent use • Sufficient power to replenish high daily mileage overnight • Predictable and reliable location • Easier to service and maintain remotely Other suited typologies: post mounted

Appendix B

Charger typology technical specifications and attributes

Table B.1: Charger typology by technical specifications and attributes

Hardware	Description	Power level (kW)	Installation cost	Maintenance needs	User accessibility	Non-user impacts	Safety	Sources
Post mounted	A slim, upright EV charge point installed directly on the pavement edge.	7-22	Low-medium. Costs driven mainly by: civil works (small foundations, cable ducting), grid connection (usually modest for 7–22 kW AC) and pavement reinstatement	Routine inspections for impact damage, water ingress, electrical overheating, RCD testing (typically every 6 months), cleaning/ventilation checks, replacement of degraded electronic modules, reactive	Blocking dropped kerbs and narrowing footways. Poor socket height and short cables Trip hazards from cables crossing pavement.	Street clutter if multiple posts installed. Potential to reduce effective pavement width (bollards are less obtrusive than large pedestals but still require space).	Electrical shock or overheating risks if damaged by impact. Trip hazards from cables stretched across footways. Visibility issues if sited poorly (particularly at night or in	West Yorkshire On-street Electric Vehicle Charging Standards Guide IET Guide to Electric Vehicle Charging Infrastructure for Local Authorities

				repairs after collisions.		Possible parking displacement; enforcement may be required. Trip hazards from trailing cables.	cluttered streets).	
Pedestal	A larger, free-standing charger cabinet containing one or more charge points. Pillars are bulkier than bollards, often with multiple sockets, metering, and communication equipment inside.	7-350	Medium-high. Driven by: heavier civil works (foundations, trenching); larger electrical connections and possible upgrades and pace requirements and traffic management.	Similar to bollards but with more internal components: cooling fans, communications, meters. Occasional firmware updates, internal inspections, and reactive repairs.	Larger footprint may obstruct footways if poorly placed. Incorrect height or heavy tethered cables may impact people with reduced mobility. Requires clear approach	Greater physical and visual footprint than bollards. Can narrow pavements or reduce visibility for pedestrians/vehicles. Trailing cables still possible when vehicles park off-line.	Larger cabinet increases collision and obstruction risks. Electrical risks from higher-power units. Public-space hazards if enclosure doors are damaged or left open.	**IET Guide to Electric Vehicle Charging Infrastructure for Local Authorities** **West Yorkshire On-street Electric Vehicle Charging Standards Guide**

	Example: **Qwello,** a public on-street AC charge point operator working with local authorities.			More complex doors, seals, and equipment needing checks.	space for wheelchair users.			

Wall-mounted	A compact EV charger fixed to the wall of an adjacent building (home, business, or boundary wall) but accessible from the street.	7-22	Low. Driven by: no new street furniture, short cabling runs and private property avoids most civil works.	Periodic electrical and connector checks. Occasional cleaning and software updates. Low civil maintenance as pavement infrastructure is unchanged.	Socket height must be compliant (PAS 1899 recommends ~900–1200 mm from ground). Cable reach may limit which parking bays can use the charger. Wall-mounted units inside garages may be difficult for users with limited mobility if the garage is narrow or has obstructions.	Minimal impact on public space. Risk of cable crossing pavement if parking alignment is poor. Low visual impact (blends with the property).	Primary electrical risks at the socket and cable. Trip hazards still possible if cable crosses the footpath. Must ensure no protrusions from the wall obstruct the footway.	

Lamppost conversion	A lamppost-integrated charging solution where the EV charger is installed inside or on the column of an existing streetlight. Example: **CityCharge** in the Netherlands	3-7	Very low-low One of the lowest capital options per location because it re-uses existing civil infrastructure and power supply.	Periodic checks of the connector (or small charging module), lamp column electrical integrity tests, software/network upkeep and reactive repairs. As the charging electronics are simpler and lower power, ongoing maintenance and operating costs are usually lower than pedestal/pillar units.	Socket height fixed by lamppost design (may be high/low). Cable reach can be limited. Harder to visually identify as a charger when not in use.	No added street clutter. Potential trailing cables across pavement. Minor coordination issues if the lighting column needs repair; must coordinate with lighting authority for maintenance.	Combined lighting and charging electrics require robust isolation. Trip risks from cables crossing to vehicle. Potential risks if older lamppost columns lack structural integrity.	**Ubitricity: Lamppost & bollard chargers for on-street charging** **Ricardo: understanding the costs and impacts of on-street charging** **Local council roads innovation group**
Buried gullies	Engineered channels embedded into or across pavements/fo	3-7	Low-medium but varies by site.	Clearing debris (leaves, grit).	Major benefit: eliminates surface cables and reduces trip	Very low visual impact once installed.	Must meet electrical ducting and separation standards if a	**DfT guidance on cross-pavement charging for EVs**

	otways that allow a charging cable to run under, or flush with, the pavement surface between a private home charger (or other fixed charger) and an on-street parked vehicle. Example: **Kerbo Charge**		Driven by: Ground conditions and reinstatement quality, length/complexity of the cable run and economies of scale (multiple installs at once cheaper).	Checks for cracking or uneven surfaces. Occasional inspection of ducting or conduit for wear.	hazards. However, currently, no cross-footway solutions are fully inclusive or compliant to a PAS 1899 standard and some users may have difficulty with some or all of the available products. For example, Motability has identified several accessibility challenges associated with cross-footway solutions: some users may struggle with bending to place the cable into the channel and it can require the vehicle to	Short-term pavement disruption during installation. No exposed cable means minimal risk to passers-by.	permanent cable is buried under a public footway. For example, distance between cross-pavement solution installation and other electrical furniture must comply with electrical safety requirements. Eliminates trailing cable hazards. Risks if pavement reinstatement is poor (uneven surfaces).	**Energy saving trust: cross-pavement charging solutions** **Richmond: Electric vehicle footway channels** **Enfield: Electric vehicle footway channels** **National Grid local authority guide to LAs**

					park precisely aligned with the gully.			
Overhead gantries	Mechanical arm (wall-mounted or free-standing) that supports the cable above the pavement and swings into position. Example: **ChargeArm**. The product itself is a passive mechanical system. The charger/EVSE is mounted to the upright or installed alongside it but the ChargeArm does not provide power.	3-7	Medium. Driven by: mechanical support structure, foundations for upright posts and coordination with private chargers.	Cleaning and lubrication of mechanical components (e.g. base cavity and arm). Inspection of arm movement (extension and retraction, gas-lifts (assists arm movement – replacement ~ every 5 years), and cable strain reliefs. Occasional replacement of mechanical assists (e.g., gas struts).	May require strength or reach to operate the arm. Controls/handles must be positioned accessibly. Reduced trip hazards since cable is elevated.	The arm involves a mechanical movement zone - users must be careful not to have bystanders in the sweep path while extending/retracting. Visible from the street; some neighbours/authorities may object depending on local conservation/ heritage contexts.	Public-space risks during arm extension/retraction. Mechanical pinch or collision hazards. Standard electrical risks at the charger connection.	**ChargeArm user manual** **Mer: EV charging with no driveway**

Pop-up/flush-fit	Pop-up chargers are retractable EVSE units installed into the kerbside, pavement, or parking bay. They remain flush with the ground when not in use and rise mechanically when a vehicle is ready to charge. Example: **Trojan Energy**, portable adaptor that connects to a sunken socket in the pavement	7-22	High. Mainly due to: complex groundworks (recessed housing, drainage), mechanical actuation systems and necessary electrical works and robust waterproofing.	Maintenance is higher than simple bollards because of the retractable mechanical elements (hydraulics/electromechanical), drainage, seals and the usual electrical/electronic asset maintenance.	Some units require manual lifting; may be difficult for users with reduced strength. Harder to spot when retracted; requires clear markings/signage.	Very low visual impact when retracted. Minimal obstruction of footways. Clear visibility when raised to prevent collision.	Electrical, mechanical safety (shock absorption / spring support, safety interlocks to prevent collapse while in use and anti-pinch features in some designs) Slips/trips if the lid or surface is not flush or becomes damaged.	**Urban Electric pop-up hub trial** **West Yorkshire On-street Electric Vehicle Charging Standards Guide** **IET Guide to Electric Vehicle Charging Infrastructure for Local Authorities**

Integrated and dual-purpose	Charge points that have been designed to integrate with other infrastructure. This can be existing infrastructure or new hardware that serves a dual-purpose (for example, local information, advertising, road updates). Example: **JOLT** - they operate a public kerbside fast-charging network and sell/operate integrated charging units.	3-25	Medium-high. Larger, heavier units requiring substantial foundations. Complex electrical connections, sometimes with battery integration. Planning requirements for large street furniture. JOLT specifically offers zero-cost installation and maintenance for local authorities.	Preventative maintenance for EVSE, screens, and auxiliary systems. Software updates and monitoring. Structural inspections of tall or heavy enclosures.	Must ensure control panels and sockets meet accessibility height/clear space standards. Larger enclosures must not narrow footways. Potential distraction if screens face pedestrian routes.	Reduces clutter by combining functions but is visually larger. Requires adequate spacing to preserve pedestrian clearway. Screens may draw pedestrian attention, affecting flow.	Electrical risks from high-power electronics and auxiliary systems. Structural risks (tall units must withstand wind loads, vandalism). Public space risks if screens or panels protrude or if users congregate around the unit.	**AIS utilities: commercial EV charger installation** **Public chargepoint impact assessment** **JOLT** **JOLT- boost your commercial property value**

Appendix C

Interface between user type characteristics and environmental constraints

Table C.1: Matrix detailing how certain user type characteristics interact with environmental constraints to inform charger requirements

		User type			
		LCV *Strong prioritisation of time efficiency and reliability over charging cost*	Disabled User *Accessibility and reliability must be prioritised over throughput and kerb efficiency*	Car *Proximity and simplicity is valued; a balance between convenience and turnover*	Taxi/PVH *Prioritisation of charging speed, predictability, and uptime over cost*
Environment	On-street urban centre *High-demand, space-constrained kerbside environment*	Physical constraints: Kerb space competition with loading, deliveries, buses and other commercial uses Larger footprint of LCVs makes bay length and manoeuvring more challenging High pedestrian/cycle flows create street clutter sensitivity	Physical constraints: • Disabled users may require wider bays, side or rear access, and clear circulation space • Street clutter (bollards, cabinets, cables) poses a disproportionate barrier • Proximity matters: excessive walking	Physical constraints: • Severe kerb space competition with loading, servicing, public transport, and micromobility • High pedestrian and cyclist flows - sensitivity to street clutter • Parking often time-limited, fragmented, and contested	Physical constraints: • Extreme competition for kerb space near stations, ranks, hotels, and night-time economy areas • Vehicles need frequent access but cannot dwell for long

		Charging requirements: Need for fast turnaround charging given that downtime has a direct cost (rapid/ultra-rapid) Short dwell times required; overnight charging unlikely in this setting Likely installation complexity but good grid access Operational management: Risk of queuing and bay hogging due to clustered demand in commercial hubs Booking or priority systems may be required; enforcement is harder in busy centres ***fast charging + minimal kerb impact + high utilisation***	distance may effectively exclude use Charging requirements: • Power demand is generally moderate; fast charging is beneficial but not always essential • Longer dwell times are acceptable if access is reliable and stress-free • Charging must be possible without lifting heavy cables or awkward reach Operational management: • Accessible EV bays require strict enforcement to prevent misuse • Time limits must be balanced with user needs (rigid turnover can be exclusionary) • Clear signage and wayfinding essential in busy, visually complex environments • Reactive maintenance is insufficient - uptime is critical (disabled users may not be able to easily	• Bays must support high turnover and clear compliance Charging requirements: • Generally short dwell times (top-up charging rather than full charge) • Fast charging is attractive, but not always essential • Wide variation in vehicle capability and battery size • Demand is spiky and difficult to predict Operational management: Risk of bay hogging if charging is slow or poorly managed Time limits and pricing required to maintain turnover (range and queue anxiety) Clear signage and consistent enforcement essential ***Convenience + turnover + kerbside efficiency***	• High turnover pressure; informal stopping already common • Charging infrastructure must not exacerbate congestion or conflict Charging requirements: Very high power charging required to support long daily mileage Frequent top-up charging throughout the day and night Short dwell tolerance; even 10-15 minutes is significant Operational management: Charging is a direct cost to income; time sensitivity outweighs price sensitivity ***Ultra-fast charging + predictability + queue avoidance***

			move to an alternative charger / a single accessible bay may be the only viable option in the area) ***Guaranteed accessibility + reliability + clear, protected space***		
	On-street urban residential *Variable parking pressure, longer dwell times, and strong equity and fairness considerations.*	Physical constraints: • Residential streets typically have high parking pressure, especially overnight • Kerb space is less commercially active but more "politically" sensitive (ie. Perceptions of fairness and monopolisation) Larger LCV footprint can exacerbate local congestion and resident concerns Street geometry may limit bay length and manoeuvring Charging requirements: • Longer dwell times are possible (overnight or between shifts) Medium power charging is generally sufficient; ultra-rapid less critical	Physical constraints: • Residential streets often have tight footways and informal parking patterns; disabled users may require wider bays, side/rear access, and clear circulation space Street clutter (bins, poles, parked vehicles) can significantly reduce usability Proximity to home is critical; longer walking distances may not be feasible Charging requirements: • Longer dwell times (overnight) are typical and acceptable	Physical constraints: Variable parking pressure Kerbside space shared with multiple users and vehicle types Footways often narrow; street clutter must be minimised Charging requirements: Long dwell times (typically overnight) Low to medium power charging is sufficient for most use cases • Speed is less critical than availability and convenience and using the same rationale, reliability and simplicity matter more than peak performance Operational management: • High risk of bay monopolisation without time limits	Physical constraints: Residential streets not designed for high-turnover commercial use Kerbside space shared with residents, visitors, and deliveries PHVs may be parked near home bases between shift Charging requirements: • Moderate dwell times in this environment (between shifts or overnight) • Energy demand is high due to daily mileage,

		Predictable access is more important than peak power Operational management: • Risk of long-duration bay occupation by LCVs • Potential conflict with residential car users Enforcement is possible but again politically sensitive Time-of-day restrictions may be necessary (e.g. overnight only) ***Predictable access + longer dwell + residential compatibility***	Charging does not need to be rapid, but must be reliable and easy to operate Cable handling and reach must accommodate seated or low-mobility users Operational management: Risk of misuse or blocking of accessible bays by non-eligible vehicles Time limits should reflect user needs - compounded by the use of non-eligible vehicles (rigid turnover is inappropriate) ***Guaranteed accessibility + certainty of access + residential compatibility***	Need to balance residents, visitors, and permit holders • Enforcement must be light-touch but consistent ***Equitable access + long-dwell compatibility + scalable deployment (demand volume, not intensity, is the dominant challenge)***	but not always time-critical in residential settings • Faster charging than private cars is beneficial, but ultra-rapid is likely not appropriate Reliability is essential: missed charging affects income the next day Operational management: Risk of long-duration occupation of bays by PHVs Potential perception of residential charging being “captured” by commercial users Enforcement must prevent displacement of residents ***Reliable energy provision + moderate speed***

					+ controlled residential impact
	On-street rural residential *Low-density kerbside environment with long dwell times, limited alternatives, and high reliance on local charging reliability*.	Physical constraints: Low-density streets with ample kerb space relative to demand Limited or no footways in some locations Off-street parking may exist but is not universal Charging requirements: • Long dwell times (overnight, sometimes multiple days) • Lower power charging may generally acceptable due to dwell length Reliability is critical: alternatives may be many miles away Ability to fully recharge overnight is important for next-day operations Operational management: • Low risk of queuing or competition • Enforcement is minimal and informal Infrastructure must work with limited on-site support	Physical constraints: Low-density streets with relatively unconstrained kerb space Footways may be narrow, intermittent, or absent Surfaces and gradients may be uneven Distance from home to charging location is a critical constraint Charging requirements: Long dwell times (overnight or multi-day) are acceptable Low to medium power charging is sufficient Charging must be highly reliable - alternatives may be many miles away (consistent factor across this environment) ie. Users may rely entirely on a single accessible charging location Operational management:	Physical constraints Low-density residential streets with generally ample kerb space Footways may be narrow, discontinuous, or absent Off-street parking exists for some households, but not all Charging requirements: Long dwell times (overnight or multi-day) Low power charging is generally sufficient for daily driving patterns Charging speed is not time-critical Reliability matters more than performance Operational management: Very low risk of queuing or conflict Chargers may be lightly used but highly relied upon Faults can have disproportionate impact due to distance to alternatives	Physical constraints: Low-density residential streets with generally ample kerb space Off-street parking may exist but is not guaranteed Long distances to alternative charging locations (not much variation from other user types in this setting) Charging requirements: High daily mileage relative to private cars Long dwell times between shifts or overnight Charging does not need to be ultra-rapid, but must be sufficient to fully replenish Reliability is critical: failure may mean

		Faults may go unreported or unresolved for longer ***High reliability + overnight sufficiency + low-density compatibility***	Low risk of competition or queuing Charger availability depends more on design clarity than regulation Maintenance response times may be longer due to location ***Guaranteed accessibility + maximum reliability + proximity to home***	**Reliable coverage + low-power compatibility + cost effectiveness**	loss of income and long detours Operational management: Very low risk of queuing or conflict Limited enforcement presence Fault resolution may take longer due to location (Again, does not really vary much by user type in this environment context) ***High reliability + overnight energy sufficiency + cost-proportionate provision***

Appendix D

On-street charging: Readiness pathways

Purpose and how to use this framework

The stakeholder engagement underpinning this report confirms that LTAs across the TfSE area are at markedly different stages of delivery maturity. Some have deployed thousands of charge points under structured multi-year programmes, while others are still navigating their first LEVI-funded procurement. A single set of recommendations applied uniformly to all authorities would inevitably be too ambitious for some and too basic for others.

This framework addresses that problem by structuring guidance around three maturity stages (Early, Developing, and Scaling) across seven dimensions that collectively determine an authority's readiness to deliver effective on-street charging. For each dimension, it provides:

- A maturity profile describing what Early, Developing, and Scaling looks like in practice, so that officers can honestly locate their authority's current position.
- Priority actions that are specific to that maturity stage, each tied to a specific section or framework within this report.
- Cross-references to the relevant analytical tools, so the pathway connects directly to the evidence and decision-support frameworks developed in earlier sections.

Most authorities will not sit at the same maturity level across all seven dimensions. An authority might be Scaling in procurement but Early in D-TRO maturity. This is expected and reflects the findings from the LTA survey and interviews.

The framework is designed to be used dimension-by-dimension, allowing authorities to identify their specific gaps and prioritise accordingly.

The seven dimensions

1. Strategy and policy
2. Kerbside controls and TROs
3. D-TRO and kerbside data maturity
4. Enforcement capacity
5. Procurement and commercial arrangements
6. Accessibility and inclusion
7. Emerging solutions readiness

The three maturity stages

Below is a description of the three stages of maturity used across the seven dimensions of delivering on-street charging.

Early	Developing	Scaling
The authority is in the early stages of on-street charging delivery. Activity is typically ad hoc, grant-led, and not yet governed by a formal strategy or repeatable processes. The priority is to establish foundations.	Delivery is underway with some structured processes, but coverage, consistency, and integration are incomplete. The priority is to consolidate, fill gaps, and build the enabling conditions for more advanced approaches.	The authority has a mature delivery programme with place-differentiated approaches, structured procurement, and systematic monitoring. The priority is to optimise, integrate emerging solutions, and lead regional practice.

Readiness pathways by dimension

The following pages set out the maturity profiles and priority actions for each of the seven dimensions. Each is designed to be read independently, so authorities can focus on the dimensions where they have the greatest gaps.

1. Strategy and policy

Early	Developing	Scaling
Where you are now	*Where you are now*	*Where you are now*
No published EV charging strategy or policy. Charging is delivered opportunistically, often driven by individual funding bids rather than a strategic framework. Objectives for rollout have not been formally set.	An EV charging strategy exists or is in development but has not been formally adopted or does not yet differentiate by place type or user segment. Rollout is guided by broad ambition rather than place-specific logic.	A mature, adopted strategy with place-specific delivery logic, clear coverage targets, and differentiated approaches for residential, commercial, and specialist use cases. The strategy is periodically reviewed.
Priority actions	*Priority actions*	*Priority actions*
1. Articulate a short statement of intent for on-street charging, clarifying primary objectives (equity, pace, utilisation, accessibility) using the framework in Section 2.3.2. **2.** Use the authority taxonomy (Section 2.3) to identify which delivery approach best reflects your current political and operational context and document the rationale. **3.** Secure a political mandate (e.g. Cabinet paper or committee report) that establishes on-street charging as a strategic priority and provides officer-level delegation for site selection.	**1.** Refine the strategy to differentiate by delivery context (residential, town centre, transport hub, fleet/taxi) as set out in Section 3.3.2 step 4. **2.** Define explicit coverage targets (e.g. walk-to-charger distances) for residential areas and service-level expectations for priority user segments. **3.** Adopt the adaptive approach described in Section 2.3.2 step 5: build in formal review points linked to utilisation data, complaint volumes, and operational performance.	**1.** Integrate on-street charging into the wider kerbside management framework (Section 4.3), treating charging as one use among loading, servicing, taxis, and Blue Badge access. **2.** Align the charging strategy with Local Transport Plan, grid capacity, and regeneration objectives. **3.** Use the PEST framework (Section 2.5) to stress-test the strategy against political, economic, social, and technological change scenarios, with particular attention to battery technology and mass-market adoption behaviour.
Key report sections: *Sections 2.3, 2.3.2*	**Key report sections:** *Sections 2.3.2, 2.5*	**Key report sections:** *Sections 2.5, 4.3*

2. Kerbside controls and TROs

Early	Developing	Scaling
Where you are now	***Where you are now***	***Where you are now***
On-street charging is deployed without TROs or dedicated bays. Informal compliance is relied upon. There is limited understanding of which kerbside restrictions currently apply at candidate locations.	TROs are used selectively, often in town-centre or high-street contexts with time-limited restrictions. Residential deployments may still lack formal controls. The TRO process is functional but slow.	A mature, place-differentiated TRO framework is in place. Residential, commercial, and specialist bays each have standard restriction templates. The authority is ready to explore dynamic or time-varying controls.
Priority actions	***Priority actions***	***Priority actions***
1. Map the existing TRO position for planned and potential charging locations. Identify whether current restrictions would conflict with, support, or be neutral to charging use. **2.** Assess whether a no-TRO approach is a deliberate policy choice (cautious rollout) or a capacity constraint. If the latter, identify the specific bottleneck (legal, resource, political) and plan to address it. **3.** For early deployments, adopt the design choices described in Section 2.1 that minimise conflict without TROs: no bay markings, small column signage only, avoidance of frontage placements.	**1.** Develop a standard TRO approach for each delivery context (residential, town centre, transport hub) so that the restrictions question is resolved by place type rather than reopened for every site. **2.** Pilot dedicated EV bays in a subset of locations to build the utilisation case before expanding, as described by interviewees in Section 2.1. **3.** Identify whether app-based charging fees could substitute for or complement existing parking controls and resolve the regulatory interface (Section 2.1).	**1.** Assess readiness for dynamic kerbside management using the practical guidance in Section 3.2.5: right locations, legal/data baseline, enforcement integration, and commercial model. **2.** Commission a reconciliation survey to check that legal TRO records match on-street reality before layering DKM on top.
Key report sections: *Sections 2.1, 2.3.1*	**Key report sections:** *Sections 2.1, 2.3.2*	**Key report sections:** *Section 3.2.5*

3. D-TRO and kerbside data maturity

Early	Developing	Scaling
Where you are now	*Where you are now*	*Where you are now*
TRO records are held as a bank of PDFs or paper documents. No D-TRO platform is in use. There is no consolidated digital view of kerbside restrictions, bay extents, or operating hours.	A D-TRO platform is in place for part of the area, or digitisation is underway. Some kerbside data is available digitally, but coverage is incomplete and may not include EV-specific restriction categories.	Comprehensive D-TRO coverage with accurate, current records. The D-TRO platform provides a single source of truth for kerbside allocation and is integrated with enforcement and CPO systems.
Priority actions	*Priority actions*	*Priority actions*
1. Assess the current state of TRO records and identify the scale of the digitisation task. Prioritise areas where charging is planned or where kerbside conflict is most acute. **2.** Review the D-TRO platforms active in the TfSE area (Table 3.4) and engage with providers to understand costs, timelines, and integration options. **3.** Begin building an asset database that cross-references lamp columns, cable gullies, charge points, and existing kerbside designations (as described in Section 2.1).	**1.** Extend D-TRO coverage to all areas with current or planned charging infrastructure. **2.** Work with your D-TRO provider to ensure EV bay types are accurately represented, noting the data model gaps identified by AppyWay (Section 3.2.4): lamppost charging categories and gully charging are not yet consistently adopted. **3.** Integrate the D-TRO platform with charging-focused planning tools (e.g. Chargepoint Navigator) so teams can view constraints in one place when assessing candidate sites.	**1.** Use the D-TRO platform as the foundation for DKM: publish bay inventories to CPOs, support live dashboard reporting, and enable enforcement integration via API (Section 3.2.4). **2.** Implement live restriction feeds to enforcement partners so that booking-led compliance checks are operationally credible (Section 3.2.2). **3.** Contribute to TfSE's regional harmonisation efforts by sharing D-TRO standards and lessons with peer authorities.
Key report sections: *Sections 2.1, 3.2.4, Table 3.4*	**Key report sections:** *Sections 3.2.4, Table 3.4*	**Key report sections:** *Sections 3.2.2, 3.2.4*

4. Enforcement capacity

Early	Developing	Scaling
Where you are now	*Where you are now*	*Where you are now*
No dedicated enforcement of EV charging bays. Parking enforcement may be provided by a district/borough with limited or no coordination on charging compliance. Enforcement is reactive rather than planned.	Enforcement of EV bays is operational in some locations (typically town centres/high streets with existing controlled parking). Coverage is patchy and may not extend to residential areas. Enforcement data is not linked to charging utilisation data.	Enforcement is integrated with D-TRO and (where applicable) DKM platforms. Booking-led compliance checks are operational. Enforcement data feeds into utilisation and scheme performance reporting.
Priority actions	*Priority actions*	*Priority actions*
1. Map the enforcement landscape: who is responsible (county vs district), what capacity exists, and whether EV bay enforcement is within current operational scope. **2.** For immediate deployments, design charging locations that do not depend on enforcement for effectiveness (no-TRO lamppost models, avoidance of contested frontages). **3.** Begin dialogue with enforcement partners about integrating EV compliance into existing patrol patterns.	**1.** Develop a proportionate enforcement approach for each delivery context, recognising that town-centre bays may need active enforcement while residential locations may rely on lighter-touch approaches. **2.** Test integration of D-TRO/ booking data with handheld enforcement devices in pilot locations (Section 3.2.4). **3.** Establish a feedback loop between enforcement observations and scheme design: where ICEing or overstay is persistent, escalate to formal controls.	**1.** Implement end-to-end DKM enforcement workflows: live restriction data, booking verification, and automated alerts for non-compliance (Section 3.2.2). **2.** Explore technology-assisted enforcement (ANPR cameras, AI-powered monitoring) for high-value or high-conflict locations (Section 3.2.4). **3.** Review enforcement data to identify whether current restriction designs are effective and adjust TRO templates accordingly.
Key report sections: *Section 2.1*	**Key report sections:** *Sections 2.1, 3.2.2, 3.2.4*	**Key report sections:** *Sections 3.2.2, 3.2.4*

5. Procurement and commercial arrangements

Early	Developing	Scaling
Where you are now	*Where you are now*	*Where you are now*
No structured procurement for on-street charging. Deployment is grant-led and ad hoc. The authority has limited experience of CPO commercial models and may rely on a single operator relationship.	One or more structured procurements have been completed, typically organised by power band (e.g. up to 8 kW, 8–50 kW, 50+ kW). Commercial terms are understood but may not be differentiated by place type.	A mature procurement framework with differentiated approaches by place type and power band. Multiple CPO relationships are in place. Performance monitoring is systematic.
Priority actions	*Priority actions*	*Priority actions*
1. Review the governance models summarised in Table 2.1 and Section 3.5.3 to understand the range of options (public ownership, concession, anchor-tenant, co-investment, community). **2.** Before going to market, clarify what the authority is optimising for: control, pace, revenue, or coverage. This determines which model is appropriate. **3.** Engage with CPOs early to understand their commercial requirements, including minimum viable utilisation thresholds and risk allocation preferences.	**1.** Tailor commercial models to delivery context: concession or revenue-sharing for commercially viable town-centre locations; co-investment or public ownership for lower-demand residential areas. **2.** Embed accessibility specifications in procurement documents using the end-to-end recommendations from Section 2.2 (socket heights, cable management, bay geometry). **3.** Negotiate data-sharing clauses that give the authority visibility of utilisation, reliability, and user satisfaction metrics.	**1.** Review contract performance against the evaluation criteria in Table 3.8 (demand, feasibility, energy, financial viability, community impact, strategic alignment). **2.** Explore how shared domestic and shared depot models (Sections 3.3, 3.4) can complement contracted CPO provision, particularly for commercial vehicle users. **3.** Consider DKM integration as a value-add in future procurement rounds: can booking functionality improve CPO utilisation enough to support improved commercial terms?
Key report sections: Table 2.1, *Section 3.5.3*	**Key report sections:** *Sections 2.2, 3.5.3*	**Key report sections:** *Sections 3.3, 3.4, 3.5.3, Table 3.8*

6. Accessibility and inclusion

Early	Developing	Scaling
Where you are now	*Where you are now*	*Where you are now*
Accessibility is acknowledged as important but is not systematically embedded in site selection, design, or procurement. PAS 1899 is referenced but practical application is inconsistent.	Accessibility requirements are specified in procurement documents. Some auditing has been undertaken. However, the holistic user journey (bay approach, manoeuvring space, cable handling, payment) may not be consistently addressed.	Accessibility is embedded as a core design requirement across all procurement, site selection, and operational monitoring. Data is published and audits are repeated as standards evolve.
Priority actions	*Priority actions*	*Priority actions*
1. Adopt the three summary recommendations from Section 2.2.4: embed accessibility expectations in procurement, improve data transparency so users can filter by accessibility features, and commit to periodic auditing. **2.** Review/audit existing installations for avoidable errors (poor orientation, excessive set-back, obstructed approach paths) and prioritise quick wins (Section 2.2.4). **3.** Engage with local disability stakeholders (e.g. Disabled Motoring UK, Motability) to understand specific barriers experienced by users in your area.	**1.** Move beyond compliance-checking to holistic user-journey assessment, recognising that installations can meet individual PAS 1899 requirements yet still be unusable (Section 2.2.1). **2.** Consider bookable kerbside space for accessible bays, particularly where Blue Badge bay allocation can be aligned with adjacent charge points (Section 2.2.5). **3.** Ensure accessibility data (bay dimensions, level access, cable type, payment methods) or 'accessibility assured' bays are published and filterable in public-facing charge point databases.	**1.** Pilot demand-led accessible provision: use DKM to dynamically allocate accessible bays at times and locations where demand data indicates they are most needed. **2.** Track emerging technologies and complementary solutions (e.g. assisted cable management, shared domestic charging,) and plan for their integration as they mature. **3.** Share accessibility audit findings and procurement language with peer authorities through TfSE to support regional consistency.
Key report sections: *Section 2.2*	**Key report sections:** *Sections 2.2.1, 2.2.5*	**Key report sections:** *Sections 3.2, 3.5*

7. Emerging solutions readiness

Early	Developing	Scaling
Where you are now	*Where you are now*	*Where you are now*
Awareness of DKM, shared domestic charging, and shared depot models is limited. The authority has not engaged with platform providers or explored pilots. Emerging solutions are seen as 'nice to have' rather than part of the delivery pipeline.	The authority has engaged with emerging solution providers and may have one or more pilots in planning or early operation. However, emerging solutions are not yet integrated into the mainstream delivery pipeline.	Emerging solutions are integrated into the delivery strategy alongside conventional on-street infrastructure. Pilots have generated evidence that informs scaling decisions. Data from shared and DKM platforms feeds into network planning.
Priority actions	*Priority actions*	*Priority actions*
1. Review the emerging solutions covered in Part 2 of this report and identify which address acute constraints in your area (e.g. DKM where ICEing is a problem; shared domestic charging where public infrastructure is sparse). **2.** Engage with one or two platform providers (Co-Charger, AppyWay, Paua) to understand their propositions, data requirements, and what a pilot would involve. **3.** Promote shared domestic charging awareness among residents through council communications, recognising it as a complement to (not substitute for) public infrastructure (Section 3.3).	**1.** Design targeted DKM pilots for locations where kerbside conflict is clearly constraining charging outcomes, following the practical guidance in Section 3.2.5. **2.** For shared domestic charging, consider a local grant scheme to incentivise early adopters who begin sharing their chargers, as suggested by Co-Charger (Section 3.3.2). **3.** For shared depot charging, identify potential public sector depot partners (council fleets, emergency services, bus operators) and explore the First Bus 'inside/flex/outside the fence' framework (Section 3.4.1).	**1.** Scale DKM from pilot locations to a network-level kerbside management approach, using the phased roadmap in Table 3.9. **2.** Integrate data from shared domestic and depot platforms into strategic assessments of where public on-street provision is most and least needed. **3.** Participate in TfSE-coordinated cross-authority pilots and shared procurement opportunities for DKM and shared charging platforms.
Key report sections: *Sections 3.2, 3.3, 3.4*	**Key report sections:** *Sections 3.2.5, 3.3.2, 3.4.1*	**Key report sections:** *Sections 3.2, 3.3, 3.4, Table 3.9*

Self-assessment summary

The table below provides a simple self-assessment tool. For each dimension, officers should identify the maturity profile that most closely describes their authority's current position and note it in the corresponding column.

This creates a snapshot of readiness that can be used to prioritise actions, brief senior officers, and structure conversations with TfSE about where regional support would be most valuable.

Dimension	Early	Developing	Scaling
Strategy and policy			
Kerbside controls and TROs **D-TRO and kerbside data maturity** **Enforcement capacity**			
Procurement and commercial arrangements **Accessibility and inclusion** **Emerging solutions readiness**			

Interpreting your assessment

Predominantly Early: Focus on establishing the foundations. The priority actions in the 'Early' column will help build the strategic, governance, and data prerequisites that more advanced approaches depend on. Do not attempt DKM or dynamic controls until the underlying D-TRO, enforcement, and policy foundations are in place.

Predominantly Developing: Focus on consolidation and targeted piloting. The authority has working delivery processes but inconsistencies across place types or user segments. The priority is to fill gaps, standardise approaches, and begin testing emerging solutions in locations where the enabling conditions exist.

Predominantly Scaling: Focus on optimisation and integration. The authority is well-positioned to lead on exploring DKM deployment, integrate shared charging models into the delivery strategy, and contribute to regional harmonisation. The priority is to move from individual scheme delivery to network-level management.

Mixed profile: Most authorities will show a mixed profile. In this case, identify the dimensions that are furthest behind relative to your strategic ambitions. A 'Scaling' authority in procurement that is 'Early' in D-TRO maturity has a specific bottleneck that will constrain the effectiveness of future deployments.

How to use this report: a navigation guide

This report contains several distinct analytical frameworks and decision-support tools. The table below maps common LTA questions to the specific sections and tools that address them.

If you are asking...	Use this tool	Found in
What strategic approach should we take to on-street charging?	Authority delivery taxonomy	Section 2.3
What hardware should we deploy in different street types?	Charger typology matrix	Section 2.4.3, Appendix A
How should we match chargers to different user groups?	User-environment interface matrix	Section 2.4.2, Table 2.9, Appendix C
What external trends should we plan for?	PEST analysis framework	Section 2.5, Table 2.10
Is DKM right for our area, and where should we start?	DKM practical guidance and readiness checklist	Section 3.2.5
Could shared domestic charging help bridge gaps in our network?	Shared domestic charging enablers and barriers	Section 3.3.2
How can we make better use of depot and fleet sites?	Shared depot charging assessment	Section 3.4
What complementary off-street solutions should we consider?	Emerging solutions matrix	Section 3.5.1, Table 3.5
Which governance and commercial model fits our context?	Governance models summary	Section 3.5.3, Table 3.7
How should we evaluate and prioritise sites?	Evaluation framework and decision pathway	Section 3.5.4, Table 3.8
What is our overall readiness to deliver?	Readiness pathways (this section)	Appendix D

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Agenda Item 14

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

Date of meeting: **13 July 2026**

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

Title of report: **Centre of Excellence Progress Update and Work Plan**

Purpose of report: **To provide a progress update on the Centre of Excellence**

RECOMMENDATIONS:

The Members of the Partnership Board are recommended to:

1) **Comment on the progress being made with the delivery of the Centre of Excellence and;**
2) **Comment on the work plan for 2026/27.**

---

1. Introduction

1.1 The purpose of this report is to provide an update on the activity and engagement delivered through the TfSE Centre of Excellence (CoE) including the content of the work plan for 2026/27.

1.2 The CoE currently supports over 350 registered users, including more than 300 local transport authority officers, alongside approximately 50 users from national agencies, universities and industry partners.

1.3 Usage data, feedback and yearly monitoring and evaluation demonstrate incremental improvements in capability and confidence among users, with the platform increasingly embedded within officers' day-to-day professional development and scheme development activity.

2. Recent Content Delivery

2.1 Since the previous Partnership Board on 19 March 2026, the Centre of Excellence has continued to deliver a programme of support to ensure continuity between the programme delivered in the previous financial year, and implementation of the 2026/27 work plan. A total of 8 webinars and 1 in person training event have been delivered since the last Partnership Board meeting. For more detail on what has been delivered, please see summary in **Appendix 1**.

3. Capability Survey 2026/27

3.1 The Centre of Excellence's annual capability survey was launched on 16 March and ran until 24 April 2026. It forms a core component of the Centre of Excellence approach, as it is used to monitor and evaluate how capability across the region is developing, building on the 2024 baseline, and identifies priority areas for support, which directly inform the annual work plan.

3.2 The TfSE Centre of Excellence uses a co-design approach to ensure support reflects real user needs and delivers practical value. Regional needs are identified through an annual capability survey of CoE Users. Officers assess both their individual and organisational capability across 35 core skills defined by the CoE Steering Group. Each skill is rated for current and desired capability. This enables us to track progress against the 2024 baseline, identify priority areas where capability gaps are the greatest, and to tailor support at the appropriate level. For example, AI in transport planning was typically rated at novice level with a target of competence, resulting in introductory training. In contrast, policy and strategy scored highly (expert level) with aspirations toward mastery, requiring more advanced content. This approach, in place since 2024, continues to provide a clear, evidence based view of regional capability and informs programme design. Full results from the latest survey are provided in **Appendix 1.**

4. Work Plan 2026/27

4.1 The work plan for 2026/27 is structured around four key themes:

- Strategic policy, leadership, and decision making
- Stakeholder focused transport planning
- Evidence-based scheme development
- Decarbonisation, zero emission vehicles, and freight planning (intended to support the TfSE Technical Work Programme)

4.2 This thematic approach has been adopted in place of delivering support against individual skills. It enables a more cohesive and integrated offer, recognising the overlap between many skill areas, offering more efficient, targeted delivery across both individual capability development and thematic work areas A full version of the work plan 2026/27 is presented in **Appendix 2**.

5. Monitoring and Evaluation (March – May 2026)

5.1 The monitoring data shows that there has been a steady increase in activity compared to the previous period. The new 'Popular Topics' page has been particularly successful in increasing usage, as it enables users to quickly access resources developed specifically for the TfSE region. For more information on the monitoring and evaluation, please refer to **Appendix 1**, summary of the Centre of Excellence progress, and **Appendix 3**, which shows the monitoring and evaluation dashboard.

6. Centre of Excellence Steering Group

6.1 The TfSE Centre of Excellence Steering Group met on 13 May to review and provide feedback on the 2026/27 work plan. The Steering Group consists of a local authority representative who have been involved since 2023, when the concept was initially being scoped, and they continue to help with internal authority feedback, new priority requests, and sense checking any new commissions, to ensure we have understood the request from officers.

6.2 The session on 13 May focused on validating the proposed themes, providing feedback on priorities and delivery approaches, and suggesting amendments or additions on the presented commissions. Feedback from the session is provided in **Appendix 1**.

7. Finance Update

7.1 An allocation of £150,000 has been allocated for delivery of the Centre of Excellence programme in 2026/27. The majority of this funding will be directed towards subject matter expert support associated with the delivery of webinars, resources, guidance, data, and tools, ensuring that the programme maximises value for users through the provision of high quality, specialist input across priority areas. The budget has been distributed across priority areas that have been identified through the capability survey. A detailed breakdown of this allocation is provided within the work plan in **Appendix 2**.

8. Next steps

8.1 The next phase will be the commissioning of subject matter experts across the four thematic areas, mobilising, and phasing delivery across the financial year to avoid user fatigue and ensure sustained engagement**.**

9. Conclusion and Recommendations

9.1 The Members of the Partnership Board are recommended to comment on the progress made in delivering the TfSE Centre of Excellence, and the proposed work plan for 2026/27.

RUPERT CLUBB
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Transport for the South East
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Appendix 1 – Centre of Excellence update

1. Introduction

1.1 The purpose of this appendix is to provide further information on several updates since March Partnership Board meeting on the Transport for the South East (TfSE) Centre of Excellence.

This update specifically covers:

- recent content delivery;
- the 2026/27 capability survey
- the draft 2026/27 work plan
- a financial update
- recent engagement and monitoring activity
- next steps

2. Content delivery since March 2026

2.1 Since the previous Partnership Board on 19 March, the Centre of Excellence has continued to deliver a programme of support. Activity delivered during this period has included:

- The conclusion of the Awareness of Emerging Technologies webinar series, focusing on emerging transport services such as autonomous vehicles.
- An in-person Network Review and Design Masterclass, showcasing real-life examples of delivering local transport schemes in constrained environments and how to interpret and apply relevant guidance in these contexts.
- The conclusion of the Scheme Development webinar series, focused on monitoring and evaluation, which attracted over 50 attendees and received very positive feedback
- An introduction to programming scripts and how they can be used to automate and streamline data analysis, with a focus on real-world transport planning applications.

Two Active Travel webinars:

- A Local Transport Authority (LTA) showcase webinar delivered by an officer from West Sussex County Council, highlighting their Active Travel Capability Assessment and how they have worked to successfully improve their score.
- A targeted session on developing and delivering School Streets schemes.

In addition, the following outputs were delivered:

- A desktop research study on devolution and Local Government Reorganisation (LGR) for Surrey County Council, assessing readiness

requirements, optimal allocation of powers, and lessons learned from devolution initiatives across the country.

- The launch of the Podaris tool to local authorities across the TfSE region. Podaris is a web-based platform that enables transport planners, engineers, and policymakers to rapidly model, analyse, and optimise transport networks. The tool is available at a significantly discounted rate through TfSE subscription, with both the tool and its introductory webinar accessible via the Centre of Excellence platform.

3. Capability Survey 2026/27

3.1 The annual capability survey forms a core component of the Centre of Excellence approach. It is used to:

- Monitor and evaluate how the capability of officers in local transport authorities across the region is developing year-on-year.
- Identify priority areas for support, which directly inform the annual work plan.

3.2 A total of 28 responses were received to the 2026/7 survey. This is less than the 42 received last year but still provides sufficient data on which to base a comprehensive programme of activity for 2026/7.

3.3 The 2026/27 survey identified eight priority areas for support:

- policy and strategy development;
- accessibility and inclusion;
- stakeholder engagement;
- use of AI in transport planning;
- presenting and communicating information;
- modelling and forecasting;
- scheme development and appraisal;
- project and programme management;

3.4 These eight areas have been consolidated into four delivery themes to ensure a more coherent, targeted, and deliverable programme of support. The first three themes group related skill areas to reflect how these capabilities are applied in practice.

- Strategic policy leadership and decision making brings together policy, accessibility and inclusion skills.
- Evidence based scheme development combines analytical, communication, and technical functions.
- Stakeholder focused transport planning aligns engagement and programme delivery skills.

3.5 This thematic approach reduces fragmentation, enables more integrated support packages, and reflects how officers work across overlapping disciplines.

3.6 The fourth theme ‘decarbonisation, zero emission vehicles, and freight’ was not a standalone survey priority, but has been included to address clearly identified gaps emerging from TfSE workstreams and national policy requirements.

3.7 Preferred delivery methods were identified as:

- webinars;
- online courses;
- guidance and toolkits;

3.8 This reflects continued strong demand for flexible, accessible learning formats and indicates that current delivery approaches are working effectively. It also supports cost efficiency by reducing reliance on in-person delivery costs such as venue hire , travel, and catering.

4. Monitoring and Evaluation March-May 2026

4.1

We have seen steady increases in the number of users and site sessions during this period. The total number of people who attended a webinar between March and May 2026 was 462, whilst the cost savings for LTAs within this quarter was £663,920 (based on the cost of the content delivered multiplied by 16 LTAs). For more detailed monitoring and evaluation, see Centre of Excellence Appendix 3.

5. Centre of Excellence Steering Group

5.1 The CoE Steering Group met on 13 May to review and provide feedback on the proposed 2026/27 Work Plan. They were broadly supportive of the proposed 2026/27 work plan and its alignment with identified capability needs. Members welcomed the focus on Accessibility and Inclusion and Policy and Strategy Development, particularly in supporting authorities to navigate emerging mayoral structures, evolving responsibilities, and new Local Transport Plan guidance.

5.2 There was strong support for enhanced policy guidance and best practice sharing, including:

- Greater clarity on stakeholder engagement at early scheme development stages.
- Sharing learning between authorities on emerging requirements and approaches.

5.3 Members highlighted opportunities to strengthen elements of the programme:

- AI and digital capability: Though supported last year, attendees recognised that support is still needed, particularly at a practical, user level (e.g. applying AI tools effectively).
- Decarbonisation: additional guidance on cross pavement charging and quantifiable carbon reduction policy, with an emphasis on sharing emerging best practice across authorities.
- Scheme development and appraisal: ensuring the work plan reflects impacts of devolution changes, including Major Road Networks (MRN) considerations.

5.4 Overall, the Steering Group endorsed the direction of the Work Plan with recommendations to strengthen practical guidance, peer learning, and responsiveness to emerging national policy and devolution changes.

Appendix 2 - Centre of Excellence Work Plan 2026/27

1. Introduction

1.1. The purpose of this Appendix is to set out the Centre of Excellence 2026/27 work programme. This has been designed to support officers across the South East with practical, targeted capability building aligned to real skills needs. The programme combines expert-led learning, peer exchange, and access to tools and data to support day-to-day delivery.

1.2. A summary of what is available this year, organised by theme, along with the budget investment in each area is set out in the following sections.

2. Strategic Policy Leadership & Decision-Making

Objective of package: Building strategic capability, aligning policy with delivery, and embedding accessibility and inclusion into transport planning.

Budget: £28,000

What's included:

- 3 webinars
- 1 in-person training session
- 2 roundtables
- 1 forum
- 1 research output

Webinars:

- Introduction to Local Transport Plan (LTP) guidance
- Building deliverable LTPs and linking to delivery plans
- Developing accessible transport networks

In-person training:

- Understanding the needs and perspectives of disabled people in transport

Roundtables:

- Applying DfT Connectivity Tool
- National Planning Policy Framework and spatial planning opportunities

Forum:

- Accessibility and connectivity knowledge-sharing forum

Research:

- Local Government Reorganisation & Devolution insights

2. Stakeholder-Focused Transport Planning

Objective of package: Developing skills in engagement, consultation, and communication to support people-centred transport schemes.

Budget: £6,500

What's included:

- 2 webinars (plus 1 delivered at no cost from previous FY)
- 1 roundtable

Webinars:

- Stakeholder-led scenario planning
- Engagement approaches and communication techniques

Roundtable:

- Lessons learned from Local Transport Plan consultations

Workshops:

- Working effectively with elected Members

3. Evidence-Based Scheme Development

Objective of package: Strengthening analytical capability, improving use of data and tools, and enhancing confidence in business case development and appraisal.

Budget: £40,500

What's included:

Webinars:

Modelling & Data:

- Transport modelling systems (TMS)
- Travel market synthesiser
- Economy and land use modelling
- Mobile Network Data (with industry experts)
- Journey time data

AI & Data Analytics:

- Introduction to programme-based data analysis
- In-person training on data tools and applications
- Sessions on practical AI use and prompt techniques
- Emerging tools (DfT Connectivity Tool, ALIGN)

Scheme Development & Appraisal:

- Strategic and economic case
- Appraisal modelling
- Wider economic impacts
- Deliverability (financial/commercial)
- Equalities and health impact assessment webinar

Roundtable:

- MRN lessons learned

4. Decarbonisation, Zero Emission Vehicles & Freight

Objective of package: Supporting officers to plan for decarbonisation, deliver zero-emission infrastructure, and respond to climate objectives.

Budget: £12,000

What's included:

- 4 webinars
- Additional training content (delivered by TfSE at no cost)

Webinars:

- Carbon and decarbonisation tools (e.g. benchmarking tools, guidance)
- Freight awareness training series

Training content on:

- Zero emission vehicle planning (cars, LGVs, HGVs)
- Sustainable freight planning

5. Additional Investment & Support

5.1 Project management (£10,000)

- to ensure effective coordination, commissioning, and delivery of the programme.

5.2 Continuation of Key Initiatives (£15,650)

- Surrey LGR & Devolution support
- Programme data tools webinar

5.3 Contingency & Emerging Priorities (£37,350)

Flexible funding to respond to:

- New government policy and guidance
- Emerging tools and datasets
- Bespoke partner needs

6. Total Programme Investment

Total investment £150,000:

- Core capability programme: £87,000
- Project Management: £10,000
- Continuing initiatives: £15,650
- Contingency and additional support: £37,350

Centre of Excellence

Centre of Excellence Monitoring & Evaluation

TRANSPORT FOR THE South East

Date Selector

Please select month/s below

Multiple selections

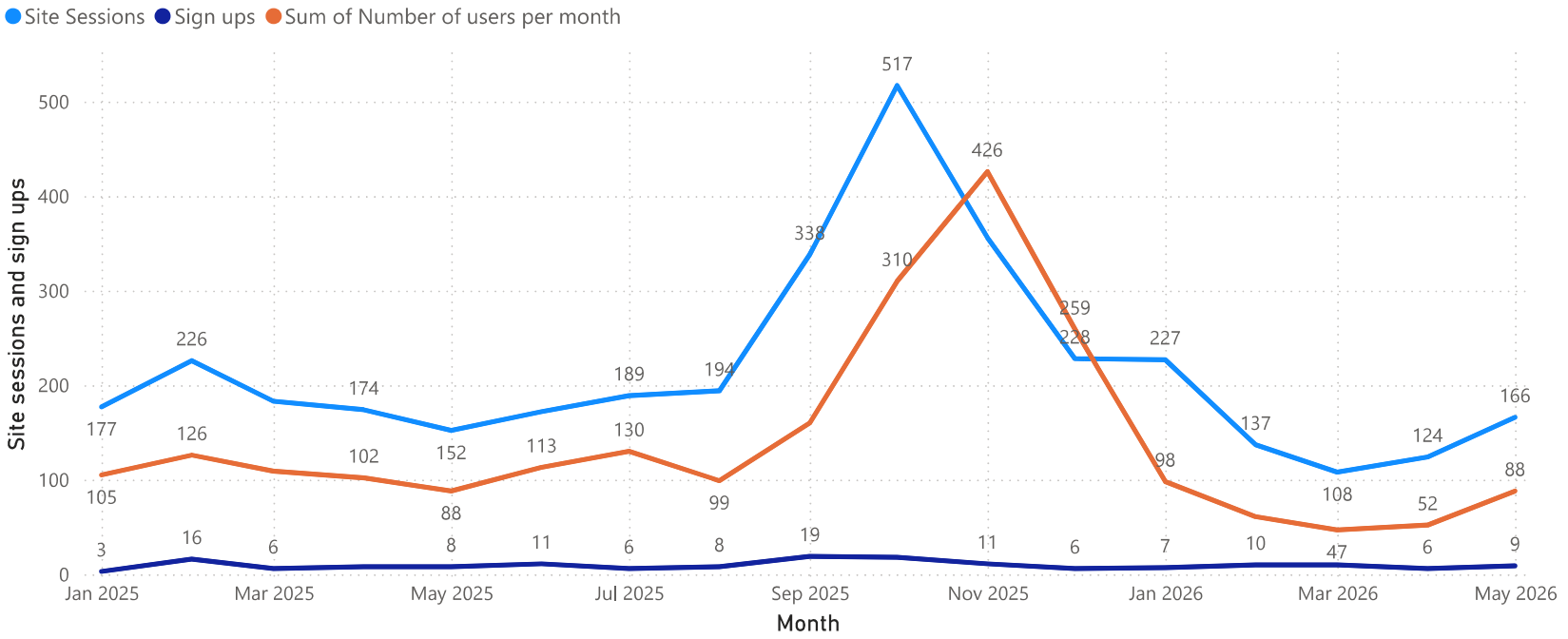
Site Sessions | Unique Visitors | Site Sessions per visitor

187
Total Site Sessions (Mar - May)

55
Content uploaded Mar - May 26

663920
LTA savings (£) (Mar - May)

Site sessions and sign ups by month



25
Site Sign Ups (Mar - May 26)

398
Total Sign Ups

501
Total Content Uploaded

16 (100%)
Number of LAs signed up

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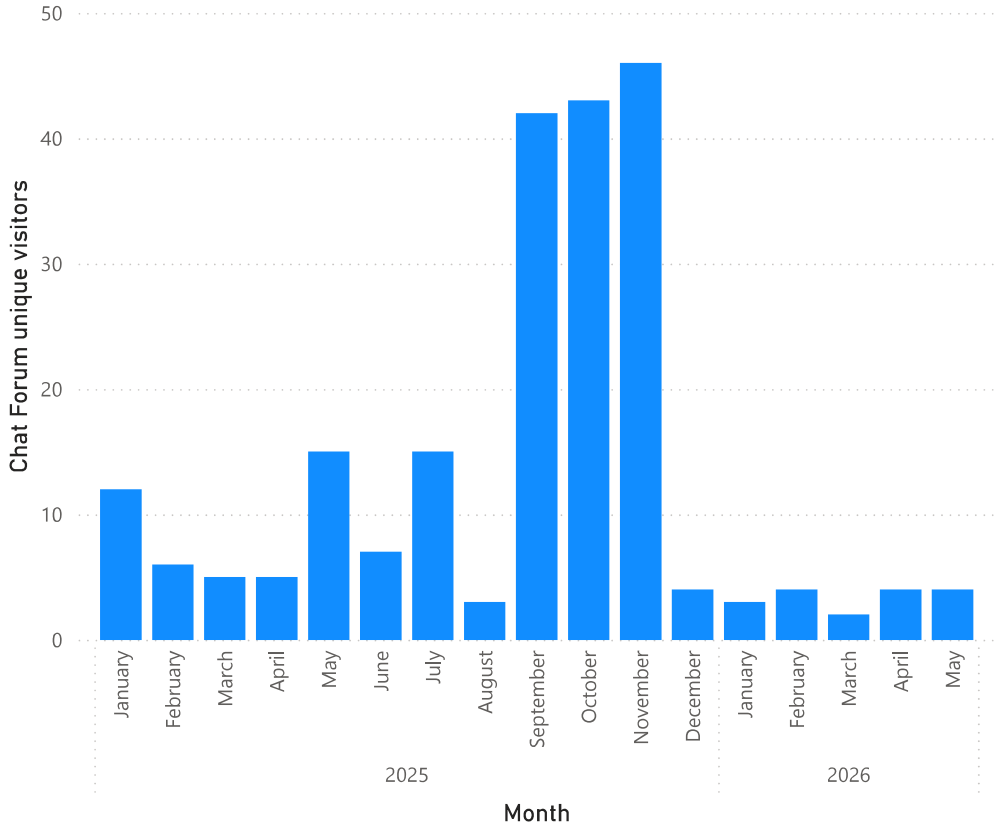
TRANSPORT FOR THE South East

Date Selector for chat forum interaction

Please select month/s below

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Chat Forum interaction



Number of unique visitors per component home page

Title	Mar 26	Apr 26	May 26	Total
webinars	21	14	19	54
events	17	8	9	34
resources	6	7	9	22
key-tools	8	3	5	16
data	3	5	7	15
case-study	1	2	8	11
qualifications-and-courses	6	3	1	10
new-to-the-sector	0	2	2	4
consultations	1	2	0	3
contact	2	1	0	3
forum	1	1	0	2
funding	0	1	0	1
procurement	0	0	0	0

Number of unique visitors for specific pages

Title	Mar 26	Apr 26	May 26	Total
groupltasdiscussion	0	0	18	18
key-tools- carbon-assessment-playbook	3	7	7	17
chatforum	2	4	4	10
populartopics	0	0	10	10
guidance	4	3	2	9
resources- transport-for-the-south-east-|-regional-travel-survey-report	1	1	7	9
webinars- tfse-centre-of-excellence-|-network-design-and-review-series-|-planning-policy,-design-guidance,-and-principles---how-to-navigate-design-guidance-for-highway-schemes-	3	3	2	8
popular-topics-packagesactive-travel	0	0	7	7
webinars- tfse-centre-of-excellence-|-chartered-	2	4	1	7

Agenda Item 15

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

Date of meeting: **13 July 2026**

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 2026/27 business plan**

RECOMMENDATIONS:

The Members of the Partnership Board are recommended to:

1) **Comment on progress with the work to support local transport authorities with the introduction of electric vehicle charging infrastructure;**

2) **Comment on the progress with the delivery of the Freight, Logistics and Gateways Strategy;**

3) **Comment on the progress with the work on rail and;**

4) **Comment on the progress with the work on decarbonisation.**

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. Electric Vehicle Charging Infrastructure

2.1 Phase One of TfSE's on-street charging study is now complete, which focused on establishing a baseline understanding of current and planned provision across the South East. The study also examined the governance, delivery and operational issues affecting rollout on residential streets as well as emerging solutions that are being deployed. A report setting out the outputs and emerging findings from this work is presented in a separate item on the agenda.

2.2 A four-part webinar series on the roll out of Electric Vehicle Charging Infrastructure was completed in March 2026. The series supported regional knowledge sharing on practical delivery issues, covering public EV charging costs and disparities, infrastructure to support light commercial vehicle electrification, accessibility of public EV charging infrastructure, and emerging findings from TfSE's On-Street Charging Solutions study. The series helped to highlight areas where further practical support and

shared learning would be beneficial, which will inform TfSE's future EVCI support offer through the Centre of Excellence and related technical work.

2.3 TfSE is developing the next phase of its EVCI support programme for the current financial year, building on the evidence and guidance produced to date. Two critical areas of work have been identified for TfSE to take forward. These are:

- **On-street Charging Solutions Phase 2** – support for interested local transport authorities to apply the toolkit developed through Phase 1 of the work, including through worked examples, case studies and light-touch supporting materials; and
- **Urban Public eLCV Charging Opportunities** – support for local transport authorities to identify credible short-term urban public charging opportunities for light commercial vehicles, using typologies, screening criteria and worked examples tested through the Fleet Electrification Working Group.

2.4 These commissions are intended to support practical delivery of EVCI for local authorities and to capture shared learning for wider use across the South East.

3. Freight, Logistics and Gateways Strategy

3.1 The Freight Awareness Programme e-training course for local authority transport, spatial planning and economic development officers was launched on 15 July 2026 via a Centre of Excellence webinar. It is also available on the Chartered Institute of Highways and Transport (CIHT) website. The course will provide transport and land use planners and policymakers with a better understanding of freight, including delivery and servicing requirements. The course will outline the importance of the freight sector, how it works, the freight issues that need to be considered in transport and land-use planning policy and processes and provide solutions for managing freight movements efficiently and sustainably. It comprises four modules covering 16 topic areas, each taking between 15 and 20 minutes to complete. The topics include introductions to:

- the structure of the freight market;
- customer and operator requirements;
- the types of regulations that affect freight, e.g. driver hours and when making deliveries
- freight infrastructure (e.g. warehousing and HGV parking sites)
- national government and local authority policy levers to manage freight's servicing and delivery requirements
- the importance of stakeholder engagement to enable freight to operate efficiently, for example, between businesses, local authorities, freight operators, and infrastructure owners and
- the importance of freight data, and how to access and use it.

3.2 The course will contribute to the CIHT's continuing professional development programme. A short guide for the freight sector on navigating the public sector was also produced and has been shared with Logistics UK, the Road Haulage Association, and their members.

3.3 The **Wider South East Freight Forum** covers the geographic areas of TfSE, England's Economic Heartland, and Transport East, and aims to promote better

understanding and good practice, and to foster greater partnership working between freight operators and the public sector. The last meeting was held on 2 July 2026 and discussed the issues facing freight operators in the transition from diesel to electric battery-powered freight vehicles. It focussed on developing a better understanding of the challenges and opportunities for freight operators, and on how regional or local policies, planning, and strategies can support the transition. Issues include the substantial time it takes for freight operators to plan vehicle purchases and for infrastructure providers to deliver charging sites to accommodate electric freight vehicles. Gaps include where and how much charging infrastructure will be required, how/who will finance it. Presentations were made by Jamie Sands from Welch Group, outlining freight operator issues, Kasia Chodurek from Aegis Energy on energy supply and charging infrastructure requirements and Michael Boxwell from Voltempo and eFreight on how fleets will adopt at scale, looking at potential business models and financing.

3.4 Work has commenced on the development of **TfSE Net-zero Freight Infrastructure Strategy**. This study will examine what alternative-fuel infrastructure for freight vehicles will be required, where it will be needed, and the implications for energy supply, land use, and infrastructure planning across the TfSE area. It will strengthen the evidence base gained from TfSE's EV charging infrastructure work. Drawing on relevant national evidence and existing studies about existing zero-emission freight infrastructure and energy supply resilience, the study will:

- help to inform infrastructure planning
- improve the practical support available to local authorities, operators and other stakeholders in the TfSE area
- assess how infrastructure needs will vary according to fleet composition, operator type and logistics patterns and
- identify the role of different infrastructure types and the implications for the energy system.

3.5 The strategy will set out how freight vehicle charging and refuelling infrastructure needs to evolve between now and 2050 across a range of plausible future scenarios, and identify the implications for infrastructure planning, energy supply and land use. The key outcomes will be a clearer understanding of infrastructure needs, locations, energy implications, and how each can influence delivery outcomes, together with practical guidance to support future planning and economic investment decisions.

3.6 Guidance for local authorities on the management of freight vehicles during local construction projects and how to improve local servicing and delivery functions by freight operators will form part of the 2026/27 work programme. The outputs from this will be made available through TfSE's Centre of Excellence platform.

4. Rail

4.1 TfSE continues to work with England's Economic Heartland, Transport East, Network Rail, DfT and TfL as part of the **Wider South East Rail Partnership** to develop a Wider South East Rail Plan. The Plan will bring together existing evidence from all partners to identify issues and opportunities, develop potential solutions and outcomes, and identify key challenges and dependencies for rail across the local and strategic authority areas in the Wider South East. It is due to be delivered in March 2027.

4.2 The Partnership will engage with the wider South East's local and newly established mayoral combined county authorities, and national delivery bodies during its development. It will clearly demonstrate how the Plan will support and align with both the central government's missions and the area's strategic and local authorities' priorities. Once completed, the Plan could then be used to inform Network Rail's and the new Great British Railways' work programmes.

4.3 The TfSE Rail Strategy identified station accessibility and integration as one of the TfSE-wide priorities. To address this, TfSE has commissioned a **First Mile Last Mile Integration Study** as part of the 2026-7 work programme. The study will focus on access to rail stations via sustainable modes. Bus connections can be poorly timed, and rail services may not stop directly outside stations. Walking, wheeling, and cycling routes can be indirect, unattractive, or difficult to use, particularly where stations are located some distance from town and village centres. The study will provide TfSE, local transport authorities, rail operators, bus operators and other partners with a clear evidence base and practical recommendations to improve sustainable access to rail stations across the TfSE area. Outcomes will include how access to stations could be improved; ways to reduce reliance on cars to access rail stations, which will also help address congestion, carbon emissions, and parking pressures; and improvements to the passenger experience through more inclusive access to rail for people without a car.

5. Decarbonisation

5.1 Work continues on the development of the Carbon Assessment Playbook (CAP) tool, developed jointly by the STBs. The tool enables LTAs to identify baseline carbon emissions and trajectories to net zero in their area, and to assess the carbon reduction potential of transport interventions included within their Local Transport Plans. The Department for Transport's latest guidance on Local Transport Delivery Plans has strengthened the role of carbon monitoring and reporting, moving it from a voluntary activity to a mandatory requirement. As a result, DfT has commissioned a further update to the CAP. These updates will ensure that the tool remains aligned with current national policy, guidance and evidence.

5.2 As reported previously, workshops have been held with LTAs in the TfSE area to help build capability in the use of the CAP. The renewed focus on carbon monitoring within the Local Transport Delivery Plan process is expected to increase interest in the tool, and TfSE will continue to support authorities in applying the updated version of the CAP as it becomes available.

6. Financial considerations

6.1 The work on the electric vehicle charging infrastructure, freight, rail, and decarbonisation set out in this report is being funded from the DfT grant funding for 2026/27.

7. Conclusions and recommendations

7.1 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 Partnership Board at their meeting in October 2026.

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Agenda item 16

Report to:	**Partnership Board –Transport for the South East**
Date of meeting:	**13 July 2026**
By:	**Chief Officer, Transport for the South East**
Title of report:	**Delivery of the Strategic Investment Plan**
Purpose of report:	**To provide an update on work to support the delivery of the Strategic Investment Plan**

RECOMMENDATION:

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

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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 Department for Transport (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 at and the resources available to both TfSE and delivery partners to progress.

2.2 This report provides an update on work that supports delivery of the interventions in the SIP, ensuring our partners have the support they need as they develop and deliver schemes.

3. Strategic Investment Plan Updates

3.1 Following approval of the refreshed SIP in March, work has continued to finalise the document and to update the accompanying interactive StoryMap, the Delivery Action Plan, and the Strategic Prioritisation Framework.

3.2 The base data is common to all these tools, and the opportunity has been taken to optimise their operation. Rather than being a standalone printed document, the Delivery Action Plan has now been incorporated into StoryMap, with information about the scheme

promoter, current status and next steps for each scheme available by clicking on the scheme location on the map. This ensures there is one source of the underlying data and streamlines future management and updating of the information.

3.3 The strategic prioritisation tool is also being updated to reflect the priorities and schemes within the refreshed SIP. This will ensure that TfSE is able to continue to provide advice to Ministers on the transport priorities across the south east. Again the opportunity is being taken to streamline the tool, The tool will continue to allow schemes to be filtered "in" or "out" to prepare a draft priority list that would respond to any specific criteria for which the prioritisation is required, such as mode, scale, cost, benefits, impacts, timescale, geography etc. To reflect changing legislative and other arrangements and to futureproof the tool, functionality will be added in to filter interventions by Mayoral Strategic Authority area where this is relevant.

3.4 It is important to recognise that this tool is decision informing, not decision making. That function remains with the Partnership Board. Any draft priority lists that are required to be prepared will be considered, reviewed, iterated (if appropriate) and approved through the pIs it a reviously agreed accompanying Governance process prior to coming before the Board for their discussion and decision.

4. Scheme Development Work

4.1 This workstream supports delivery partners to progress schemes through the feasibility study or Strategic Outline Business Case (SOBC) stage where they are not able to fund or resource the work themselves.

4.2 The schemes that have been funded across the three financial years since inception are shown in Tables 1, 2 and 3 in Appendix 1. Through this programme TfSE has been able to support 14 schemes, providing over £800,000 in funding which supports the building of a pipeline of schemes ready for delivery in the coming years.

4.3 Work is continuing to review the support provided to date, and to refine and develop a more holistic offer for future financial years, including support that can be provided through the Centre of Excellence.

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

5.1 TfSE continues to support delivery partners with the Major Road Network (MRN) and Large Local Majors (LLM) programmes for the region, through support to local transport authority promoters and liaison with DfT.

5.2 On 26 March 2026, DfT announced the results of their review of the schemes within the MRN/LLM programmes. Of the seven schemes in the TFSE area that were under review, 4 were confirmed as remaining in the programme, one was removed due to deliverability and affordability issues, whilst a decision is awaited on the remaining two schemes. The table below shows the status of all the MRN/LLM schemes in the TFSE are.

Scheme Name	Local Authority	Programme Status
A22 Corridor Package	East Sussex County Council	In programme, not under review
A259 (King's Road) Seafront, Highway Structures ("Arches") renewal Programme)	Brighton & Hove City Council	In programme, not under review
A259 Bognor Regis to Littlehampton Enhancement	West Sussex County Council	In programme, not under review
A284 Lyminster Bypass	West Sussex County Council	In programme, not under review
North Thanet Link (previously A28 Birchington, Acol and Westgate-on-Sea Relief Road)	Kent County Council	In programme, not under review
Northam Rail Bridge	Southampton City Council	Confirmed
A229 Blue Bell Hill Improvements	Kent County Council	Confirmed
A259 South Coast Corridor	East Sussex	Confirmed
A326 Waterside Improvements	Hampshire County Council	Confirmed
A31 Farnham Corridor (Hickleys Corner)	Surrey County Council	Under review
City Centre Road	Portsmouth City Council	Under review
West Quay Road Realignment	Southampton City Council	Removed

5.3 TfSE will continue to advocate for the schemes in the region, and provide support to our scheme promoters as the revised MRN/LLM programme progresses. Our Analytical Framework is available to local authorities, and further training and guidance on business case development is available to officers through the Centre of Excellence.

6. Third Road Investment Strategy (RIS3)

6.1 On 26 March 2026, DfT set out the government's priorities for the strategic road network (SRN) in England from 2026 to 2031, known as Road Investment Strategy 3 (RIS3). RIS3 shapes how England's motorways and major A roads are operated, maintained, renewed and improved.

6.2 Investment in RIS3 supports the government's growth and housing agenda, increases the resilience of transport infrastructure, addresses long-standing congestion pinch points and enables the parts of the network that are reaching the end of life to be

fixed. The strategy also sets out how £27 billion in funding will be invested into major renewals, enhancements, national programmes and funds to deliver RIS3 outcomes.

6.3 TFSE officers have been engaged with DfT and National Highways as the RIS3 development process has taken place. The Vision and Objectives outlined in RIS3 are supported and align strongly with the Mission set out in our own Transport Strategy and Strategic Investment Plan (SIP), particularly those around sustainable development and resilience of the transport network.

6.4 However, it is disappointing that there are very few schemes planned for delivery or development during the RIS3 period within the TFSE region. Although several previous schemes were cancelled by the Government, the evidence base behind our strategy demonstrates that the need for intervention is no less diminished, and our SIP continues to identify several schemes on the SRN that are required.

6.5 TfSE officers will continue to meet with both DfT and National Highways as the RIS process continues, to ensure the regions needs and priorities are taken into consideration.

7. Financial Considerations

7.1 The work set out in this report is being funded from the DfT grant allocation awarded to TfSE for 2025/26.

8. Conclusions and recommendations

8.1 The Partnership Board is recommended to comment on the progress of a range of workstreams that support the delivery of the Strategic Investment Plan.

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Item 16 – Delivery of the SIP - Appendix 1

Table 1 - Development support schemes – 2023-24

Promoting Authority	SIP ref	SIP Scheme Name	Status	Support for:	Award
Kent County Council	V2, V3 & V17	Fastrack Optimisation and Extension	Complete	Feasibility Study	£51,297
Medway Council	S16	New Strood Interchange	Complete	Pre-Feasibility Study	£20,000
Portsmouth City Council	B5	Cosham Station Mobility Hub	Complete	SOBC	£30,000
Southampton City Council	I10	West Quay Road Realignment	Complete	SOBC	£100,000
				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	Complete	SOBC	£100,000
Surrey County Council	N1	London to Sussex Coast Highways (A22 N Corridor (Tandridge) South Godstone to East Grinstead)	Underway	Feasibility Study	£50,000
East Sussex County Council	N3b & N18	A22 North of Hailsham to Maresfield (MRN Pipeline) Corridor SOBC	Complete	SOBC	£50,000
Berkshire - Wokingham Borough Council	P7, P9, P12, P18, Q1	A4 Berkshire - Quality Bus Corridor and Active Travel Improvements	Complete	Feasibility Study	£75,000
Hampshire County Council	E2	South East Hampshire Area Active Travel	Underway	Feasibility Study	£50,000
Brighton & Hove City Council	A2 & A3	A27/A23 Patcham Interchange & Falmer Strategic Mobility Hub	Complete	Feasibility Study	£50,000
Solent Authorities - NR	G2 & G3	A2 Botley Line Double Tracking & A3 Netley Line Signalling and Rail Service Enhancements	Complete	SOBC	£50,000
Kent County Council	S22	Gatwick-Kent Service Enhancements	Underway	SOBC	£30,267
				TOTAL	**£455,267**

Table 3 - Development support schemes – 2025-26

Leading Authority	SIP ref	SIP Scheme Name	Status	Support for:	Award
Southampton City Council	C1	Southampton Mass Transit	Complete	Feasibility Study	£100,000
Portsmouth City Council	C2	South East Hampshire Rapid Transit Future Phases	Underway	Feasibility Study	£50,000
				TOTAL	**£150,000**

Agenda Item 17

Report to:	**Partnership Board –Transport for the South East**
Date of meeting:	**13 July 2026**
By:	**Chief Officer, Transport for the South East**
Title of report:	**Communications and Stakeholder Engagement Plan and 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 comment on the communications and engagement plan, and activity that has been undertaken since the last meeting.

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, and recent and upcoming events.

1.2 Following the local elections in May, we are welcoming 5 new board members whom we have contacted and offered an introductory TfSE meeting.

1.3 TfSE's Chair Keith Glazier OBE did not stand for re-election in May and has stood down from his position with TfSE. We would like to thank him for the tremendous work he has done to establish the organisation since its creation in 2017 and wish him well for the future.

2. Recent communications and engagement activity

2.1 TfSE continues to use communication and engagement activity to support the implementation of TfSE's technical work programme and the promotion of the organisation with our audiences.

2.2 The team has closely monitored the outcome of those elections and subsequent local authority AGMs and the impact on TfSE. New board members have been contacted and Register of Interest forms have been despatched.

2.3 The team has worked closely with wider TfSE officers to prepare for the board meeting including planning and preparation for a 'welcome' session with all Members immediately preceding July's meeting.

2.4 A new TfSE 'prospectus' has been developed to provide board members and councillors with an introduction to TfSE and its supporting member authorities. It

outlines the support, evidence and expertise TfSE provides to strengthen transport planning and investment decisions and reinforces the value of regional collaboration in responding to financial and delivery pressures.

3 Events and speaker slots

Future events/speaker slots

3.1 TfSE's Analysis Manager Joshua Jiao presented at the Modelling World Conference in Leeds last month. He showcased the development of our Travel Market Synthesiser and focused on the benefits of shared transport modelling for local authorities, as well as a discussion about the joint challenges posed by geography and transport mode he encountered during the development work.

4. MP engagement and public affairs

4.1 In May, TfSE Chair Cllr Keith Glazier wrote to the Secretary of State Heidi Alexander, to present the Transport Strategy and refreshed Strategic Investment Plan as the region's formal advice on transport priorities.

4.2 The letter highlighted the South East's significant contribution to the national economy, while noting that transport networks are struggling to meet demand. It made the case for investment to improve connectivity, rail capacity and resilience, and raised concerns about the short-term and limited funding available to Sub-national Transport Bodies, including the risk this creates for long-term strategic funding.

4.3 The letter also provided an opportunity for Cllr Glazier to formally announce his departure and encouraged continued Government engagement with TfSE and consideration to the Strategy and SIP in future decision making.

4.4 Following a request from Bexhill MP Kieran Mullan, we provided detailed information about the A21 corridor, referencing the SIP and East Sussex County Council's Local Transport Plan 4. Both documents highlight the corridor's strategic role in supporting connectivity to the East Sussex coast and identify opportunities to improve safety, resilience and reliability.

4.5 In the Spring, TfSE's Chief Officer Rupert Clubb attended a roundtable hosted by Mims Davies MP and Natasha Irons MP on behalf of GTR. Focused on the Brighton Mainline and the Croydon Area Remodelling Scheme, the event provided an opportunity to present TfSE's Strategic Investment Plan to South East MP's and industry stakeholders.

5. Delivering against our Communications and Engagement Plan

5.1 We continue to follow the priorities and objectives outlined and monitor outcomes and progress of our communications and engagement activities.

5.2 Devolution and local government reorganisation remains a key issue. We are monitoring possible impacts for TfSE and are developing a 'prospectus' for new officers and councillors that sets out TfSE's role and how our work supports the region's local transport authorities.

5.3 Despite limiting social media output during the pre-election period, the number of LinkedIn followers has continued to rise and is now 1571, which is 50 new followers since March's board, a 3.4% increase. This was boosted by the release of the Strategic Investment Plan and high engagement on a series of posts marking International Women's Day

5.4 We have updated elements of our website to improve and simplify navigation which will continue into the summer. These are simple changes but will make the information that visitors request more accessible.

6. Communications and Engagement Strategy

6.1 The Communications and Engagement Strategy 2026/27 sets out how communications and engagement will support TfSE's priorities in the coming year, with a focus on constituent local authorities, board members, senior officers and transport officers. It aims to strengthen the understanding of TfSEs role, value and the benefits of regional collaboration.

6.2 Supporting TfSE's new 'prospectus,' the strategy recognises the challenges facing local authorities within a changing political and local government landscape and sets out a practical and targeted approach to engagement.

6.3 Activity will include a proactive media and digital engagement, targeted political communications, and collaborative campaigns with partners, to ensure TfSE remains visible, relevant and influential throughout the year.

6.4 The plan contains the following:

- Purpose
- Context
- Strategic Focus
- Priority Audiences
- Core Messages
- Engagement Approach
- Channels
- In Practice
- Funding Context
- Evidence and Measurement
- Summary

7. Conclusion and Recommendation

7.1 The Partnership Board are recommended to comment on the TfSE communication and engagement strategy, and activity undertaken since the last Partnership Board meeting.

RUPERT CLUBB
Chief Officer
Transport for the South East

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Appendix 1

TRANSPORT FOR THE South East

Communications and Engagement Strategy 26/27



Purpose

This strategy sets out how communications and engagement will support Transport for the South East's priorities in 2026/27. It builds on last year's plan but reflects the current operating environment and TfSE's evolving priorities more directly.

Its focus is on the audiences that matter most to TfSE's future - local transport authorities (LTAs) across the region, particularly Partnership Board members, elected members, senior officers and transport officers.

The aim is to make sure these audiences understand TfSE's role, recognise the value TfSE brings, and remain confident in the benefits of working together at a regional level.

This document is not intended to restate the full case for TfSE, as set out in the TfSE Prospectus. Instead, this strategy explains how communications and engagement will support that in a practical, proportionate and targeted way.

Context

Local transport authorities are operating in a difficult environment. Financial pressures remain significant, expectations on evidence and deliverability are rising, and governance arrangements are changing as devolution and local government reorganisation evolves. At the same time, TfSE needs to continue showing clear value to its members and partners.

That context shapes this strategy. Communications needs to be focused, useful and proportionate. It will explain TfSE's value clearly, maintain confidence among members, and support strong relationships with those authorities and officers who rely on TfSE's work.

Strategic Focus

The communications and engagement approach for 2026/27 will focus on four priorities.

Strengthening understanding of TfSE's role

Communications will help LTAs understand TfSE's role, value, and support for local priorities. This is particularly important for members and officers who may not engage with TfSE regularly.

Supporting confidence in TfSE's value

TfSE's communications will demonstrate practical value through evidence, delivery and relevance to member authorities. That includes highlighting the support provided through TfSE's evidence base, strategic work, officer support and Centre of Excellence activity.

Maintaining strong relationships with LTAs

Board and officer relationships are TfSE's most important communications asset. The strategy will support those relationships through regular, useful and well-targeted engagement rather than relying too heavily on broad public-facing activity.

Maintaining relevance in a changing environment

As governance arrangements develop and funding remains under pressure, TfSE needs to remain visible and credible with new and existing decision-makers. Communications will help TfSE stay relevant to current members while also introducing its role clearly to new audiences where needed.

Priority Audiences

Local transport authorities

LTAs are the central audience for this strategy, with a focus on Partnership Board members, elected members, senior officers and transport officers across the region. These audiences are closest to TfSE's work and are most likely to influence support for the organisation, make use of its work and advocate for its value.

New decision makers and leaders

Changes to local authority leadership, the establishment of mayoral combined authorities and the appointment of new transport decision makers will create several important audiences across the region. Many will be less familiar with TfSE and will require a clear understanding of its role, governance arrangements and the value it provides to partners.

Wider stakeholders

Government and MPs, national delivery partners, business and industry stakeholders and the media remain important, particularly in supporting TfSE's wider profile and influence. However, the priority remains strong communication with member authorities and officer relationships.



Core Messages

A small number of consistent messages, adapted for different audiences will be used.

LTAs are under pressure

Communications will recognise the environment in which member authorities are operating. Funding is tight, expectations are increasing, and transport planning is becoming more demanding. TfSE's tone will reflect that reality.

Regional collaboration matters

Many transport issues do not stop at administrative boundaries. TfSE's role in bringing LTAs together, aligning priorities and supporting a shared regional view remains an important part of its value.

TfSE provides practical support

TfSE is most credible when it is seen as useful. Communications will therefore focus on the practical support it offers, including evidence, analysis, coordination, technical input, skills support and a stronger collective voice.

TfSE adds value for members

Wherever possible, communications will show how TfSE helps LTAs make better decisions, make better use of limited capacity, and strengthen their ability to plan and deliver.

TfSE remains relevant

As funding pressures continue and governance evolves, TfSE's communications will reinforce its continued relevance to members and partners.

Engagement Approach

This strategy will be led by relationships rather than channels.

The most effective routes for engagement are the Partnership Board, established officer relationships, senior officer groups, transport officer networks and existing programme contacts. These are the routes through which TfSE can communicate most directly and credibly with the audiences that matter most.

Engagement will therefore focus on:

- regular updates for Board members, currently via quarterly board meetings
- direct engagement through officer relationships and networks, particularly through the Centre of Excellence
- communications linked to TfSE work and outputs
- concise onboarding for new leaders and new governance structures where relevant.

This approach will help TfSE maintain a stronger connection between communications activity and organisational priorities. It also reflects the fact that direct engagement is likely to be more valuable than broad awareness work when resources are under pressure.



Putting This Into Practice In 2026/27

This strategy will be delivered through focused, practical communications activity, with the emphasis on the audiences and relationships that matter most to TfSE. In practice, that will include:

- updates for Partnership Board members, including quarterly Board papers and occasional briefings
- continued engagement with officers through existing relationships and networks to share useful information and feedback
- communications linked to TfSE's main outputs and support offer, including strategy work, investment priorities, scheme support, evidence and Centre of Excellence activity
- briefing and onboarding material for new leaders and new governance structures
- social media, the website and appropriate partner channels to reinforce messages and share evidence of delivery
- greater use of case studies and practical evidence to highlight TfSE's value



Funding Context

TfSE's communications approach will reflect the wider funding environment of financial constraint, scrutiny and uncertainty for both TfSE and its member authorities.

This has three implications for communications.

- **TfSE will be clear about the value it provides.**
  Broad profile-raising is not enough on its own. Communications will show how TfSE helps local authorities in practical terms.

- **Communications will be more selective and targeted.**
  In a constrained environment, effort will be focused on audiences, relationships and products that support confidence, understanding and continued relevance.

- **Communications will support the case for TfSE's continued role.**
  Where members are reviewing priorities closely, TfSE needs communications that reinforce its usefulness and its contribution to stronger planning, evidence and coordination.

The move towards longer-term local transport funding for LTAs also makes it more important that TfSE is seen as a body that can help members plan well, prioritise effectively and make the most of available funding.



Evidence and Measurement

TfSE will communicate value more consistently and more clearly. That means using evidence more often and more deliberately.

Communications will draw where possible on:

- practical examples of support to LTAs
- evidence of shared value or efficiencies
- examples of scheme support or capability building
- relevant case studies
- clear proof that TfSE's work is helping authorities strengthen planning, prioritisation or delivery.

Success will be measured first by whether key audiences have a stronger understanding of TfSE's role and a greater appreciation of the value it delivers.

The main indicators will be:

- stronger understanding among Board members and officers of TfSE's role and offer
- greater confidence in TfSE's relevance and usefulness
- briefings, support materials and other member-facing communications where necessary
- more consistent use of evidence and practical examples in TfSE's communications
- continued support from the audiences that matter most.

Digital and media metrics will still be monitored, but they will be treated as supporting indicators rather than the main test of success. Reach is useful, but it is not the same as confidence or influence.



Summary

This strategy is intended to keep TfSE's communications focused on the audiences and relationships that matter most.

It reflects the need for a more targeted approach in a tight funding environment, while keeping the focus on LTAs, practical value and continued relevance. It also recognises that TfSE's most important communications challenge is not simply visibility but being clearly understood and confidently supported by its members and partners.



TRANSPORT FOR THE
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Agenda Item 18

Report to:	**Partnership Board –Transport for the South East**
Date of meeting:	**13 July 2026**
By:	**Co-Chairs, Business Advisory Group**
Title of report:	**Business Advisory Group**
Purpose of report:	**To update the Partnership Board on the progress of TfSE's Business Advisory Group**

RECOMMENDATION:

The members of the Partnership Board are recommended to:

1) **Note the progress 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 – Feedback for Partnership Board

2.1 The BAG last met earlier in the year and heard updates on the status of key TfSE work, including the Strategic Investment Plan refresh, devolution, TfSE's recently approved rail strategy, and TfSE's workplan for 2026/27.

3. Business Summit

3.1 Members of the BAG have fed back positively on the inaugural Business Summit held in Guildford last year and expressed an appetite for another event to be hosted.

3.2 Initial plans for Business Summit for 2026 were discussed and TfSE officers and the Business Advisory Group co-chairs started work on developing plans for the format and key subject areas which could be covered as part of this event with initial ideas focused on affordability of transport and integration of transport across modes.

3.3 Following the DfT funding settlement for TfSE, the political change in our region and changes to internal resourcing the decision has been taken to postpone the planning of this event to later in the year. This will enable officers to extend the invitation to more Partnership Board Members.

4. Next Steps

4.1 The team will continue to plan a second annual summit aiming to grow attendance to around 100 senior stakeholders from business, government and local authorities.

5. Conclusions and recommendations

5.1 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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