

# Annual Report 25/26



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# Chair's Foreword

Councillor Keith Glazier OBE

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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

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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

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## 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.

**23/24**

**Awarded**

### **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**  
*Working with Brighton & Hove City Council* **£50,000**  
Completed in 25/26

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

## 25/26

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

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

**Southampton Mass Transit Feasibility Study**  
*Working with Portsmouth City Council with support from Hampshire County Council and Isle of Wight Council* **£100,000**  
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

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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

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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

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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

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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

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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

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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<br>(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                 |
| <b>Total</b>                               | <b>£144,402</b> | <b>£2,310,432</b>                                 |                     |



### 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

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## 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 Universities 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                                     |

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



# Finances

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*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         |
| <b>STAFFING</b>                  | <b>1,339,857</b> | <b>1,212,620</b> | <b>127,237</b> |
| 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         |
| <b>TECHNICAL PROGRAMME</b>       | <b>2,269,465</b> | <b>1,573,668</b> | <b>695,797</b> |
| 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         |
| <b>COMMUNICATIONS/ENGAGEMENT</b> | <b>59,000</b>    | <b>64,079</b>    | <b>-5,079</b>  |
| TfSE Governance                  | 0                | 10,860           | -10,860        |
| Operational Expenses             | 75,000           | 19,779           | 55,221         |
| <b>OTHER</b>                     | <b>75,000</b>    | <b>30,639</b>    | <b>44,361</b>  |
| <b>TOTAL EXPENDITURE</b>         | <b>3,743,322</b> | <b>2,868,146</b> | <b>875,176</b> |



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.

|                                            |           |
|--------------------------------------------|-----------|
| <b>FUNDING 2025/26</b>                     |           |
| <b>Local Contributions</b>                 | 498,000   |
| <b>DfT Grant</b>                           | 2,161,666 |
| <b>Carry Forward</b>                       | 1,205,656 |
| <b>TOTAL FUNDING</b>                       | 3,865,322 |
| <b>TfSE Reserve</b>                        | 496,730   |
| <b>TOTAL FUNDING INCLUDING RESERVE</b>     | 4,362,052 |
| <b>CARRY FORWARD</b>                       | 1,493,907 |
| <b>CARRY FORWARD NOT INCLUDING RESERVE</b> | 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

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## 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.





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