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

Date of meeting: **3 July 2023**

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

Title of report: **Transport Strategy Refresh**

Purpose of report: **To agree the approach to refreshing the transport strategy.**

RECOMMENDATIONS:

The members of the Partnership Board are recommended to:

> **(1) Agree that a refresh of the transport strategy is needed; and**

> **(2) Agree that comprehensive refresh option (Option 2) should be pursued, rather than the basic option (Option 1).**

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1.   Introduction

The purpose of this report is to set out the rationale for undertaking a refresh of the transport strategy and the relative merits of two different approaches to a refresh that could be adopted.

2.   Background

2.1   The existing transport strategy was adopted by the Partnership Board in July 2020. At the time of adoption, it was intended that the strategy would be updated every 5 years to reflect any changes in context that are of relevance to the strategy. This is in line with established best practice on strategy development. A number of significant changes have taken place during the last two and a half years that prompt the need for a refresh, as listed below:

- Significant changes in government policy, including the adoption of new policies such as the Transport Decarbonisation Plan, Bus Back Better Strategy and The Williams-Shapps Plan for Rail;
- An increased focus on decarbonisation as a policy objective at a national and local level;
- The role of improved connectivity in 'Levelling Up' the United Kingdom;
- The ongoing legacy of Covid-19, notably its impact on the economy and the uncertain impacts it has had on the travel market;
- The legacy of Brexit, especially on freight movements at major international ports and airports; and
- Changes in the local policy context, including the adoption of new Local Transport Plans and new Local Plans.

2.2   All of these changes prompt the need for a refresh of the transport strategy. It should be stated from the outset that reviewing the transport strategy does not mean

that the existing transport strategy or associated documents (e.g. the Strategic Investment Plan) are in any way unsound. Refreshing transport strategies is standard practice either on standard schedules (e.g. 5 years) or where there are indications that there has been a significant change of circumstances. Until the completion of that refresh process, the existing transport strategy is still in effect.

3.   Establishing the need for a refresh of the transport strategy

3.1   Research has been undertaken to enable recommendations to be formulated on the need for a refresh and the form that it should take. This included the following activity:
- A review of the data that underpins the evidence base for the current strategy to identify gaps in our understanding;
- Reviewing the future scenarios that were used to develop the existing 2050 vision;
- Reviewing the change in the national policy context; and
- Interviewing other regional bodies (including other STBs) on best practice in developing and refreshing regional transport strategies.

3.2   Based upon the results of this review, and engagement with the Transport Strategy Working Group, Senior Officer Group and the Transport Forum, a number of conclusions have been reached:
- There is clear rationale for a refresh in the face of the major changes in the national policy context, with a change also in the understanding of the primary policy objectives relating to transport that affects the South East;
- The long term implications of Covid-19 on the travel market and other significant changes, mean that the current situation and pathways to the future scenarios that were used to help develop the strategy have radically shifted; and
- The 2050 vision for the transport strategy may still be a valid one, and an exercise to review and refresh that vision may be useful, even if it results in only minor refinements.

3.3   In the light of the outcomes of this review, a refresh of the transport strategy is necessary to ensure its continued relevance in a context which has radically changed since its adoption in 2020. Members of the Partnership Board are recommended to agree that a refresh of the Transport Strategy is needed.

4   Options for refreshing the transport strategy

4.1   The aim of any transport strategy refresh should be to update it to ensure that it continues to present a bold and ambitious vision for the future development of the transport system across the entire TfSE area. Any update will involve the following activities (although the scale, focus and outputs can vary according to the option chosen for the refresh):

- Collating updated data and new data sets that form part of the evidence base underpinning the strategy to provide meaningful insight that will inform the refresh;
- Reviewing the future scenarios in a manner that explores the future uncertainty affecting the transport system across the TfSE area;
- Reviewing the existing transport strategy vision, strategic goals and priorities to ensure that they are still valid and reflect the ambitions of TfSE and its partners;
- Engage with our partners and stakeholders to help develop the strategy; and
- Develop new policies and an action plan that is deliverable by TfSE and its partners.

4.2   Two potential approaches to the refresh have been developed for consideration by the Partnership Board as follows:
- Option 1 is a basic refresh, deliverable in the shortest time at the lowest cost. This approach would focus on reviewing, updating and amending the content of the existing strategy.
- Option 2 would consist of a comprehensive refresh, based on a strong ethos of co-creation with key stakeholders, applying all best practice lessons in transport strategy development. It would take longer to produce and would be a more expensive option.

4.3   A fuller explanation of the rationale underlying these two options, along with a comparison of their relative merits is set out in Appendix 1. The key characteristics of the two options are summarised in Table 1 below.

Table 1 – A comparison of the key characteristics of the two options for the transport strategy refresh

	Option 1 – basic refresh	**Option 2 – comprehensive refresh**
Main Characteristics:	- Update of existing evidence base with latest data - Limited review of future scenarios - Sense-check of current vision - Limited updates to policies - Engagement with stakeholders to 'check in' on strategy development at key stages 12 week public consultation	- Updated evidence based on outcomes, e.g. decarbonisation, economic growth and Levelling Up - Refresh and update future scenarios - Refresh of the vision based on new scenarios and data collection - Extensive engagement with key stakeholders to 'co-create' the strategy, including engagement with subject matter experts to develop policies, - Targeted support for local authorities on strategy alignment with local transport plans 12 week public consultation
Primary Output:	Updated amended transport strategy	Fully revised transport strategy and supporting technical documentation

	Option 1 – basic refresh	**Option 2 – comprehensive refresh**
Anticipated delivery timescale:	12 month development period to consultation draft. Final sign off of strategy in March 2025 .	18 month development period to consultation draft. Final sign off of strategy in October 2025.

5. Key considerations

5.1   There are several factors that need to be considered to inform a decision about which option should be taken forward.

5.2   A key consideration is the level of engagement that would be sought from stakeholders as part of the refresh. Option 2 focusses on a co-creation approach, working with stakeholders and subject matter experts to help develop the evidence base and policy priorities in a number of priority areas, such as decarbonisation, securing economic growth and Levelling Up. Option 1, by contrast, would involve more of a 'show and tell' approach, checking in with key stakeholders on progress at key points during the strategy development process, giving them the opportunity to 'check and challenge' the emerging content. Both approaches would include a full 12 week public consultation on a draft strategy document and accompanying integrated sustainability appraisal.

5.3   Another key consideration is cost of the two options. A supplier would be engaged to undertake the majority of the technical work needed to complete the refresh. The intention is to use the new call off contract for this purpose. Option 1 would be the lower cost option with a preliminary cost estimate of £412k. It is estimated that Option 2 would cost £646k owing to the greater depth and extent of the work involved. By comparison the current transport strategy cost £814k to produce (a key cost element of the development of the original transport system was the development of the South East Economic Land Use Model (SEELUM) that was used to test the future scenarios. This is now in place and would be used as part of the transport strategy development process). An additional cost has been added to Option 2 - comprehensive refresh, to take account of the co-design approach to the strategy, which will involve an increased level of stakeholder engagement and associated support. The cost of undertaking the full analysis of the responses received to the public consultation has also been included in the cost estimate, in addition to the production of a consultation report, setting out the responses that have been received and recommending the changes that should be made to the draft strategy.

5.4   Another consideration is the time that it would take to develop, consult on and approve the strategy. Indicative timelines for each of these three stages are shown in Appendix 2 (Option 1 - the basic refresh) and in Appendix 3 (Option 2 – the comprehensive refresh). For Option 1 it is estimated that the technical work needed would take 12 months to develop followed by a further eight month period during which there would be a full public consultation and updates to the draft strategy to reflect the feedback received during the 12 week public consultation. The final strategy would be approved by the Partnership Board in March 2025, after which it

would be submitted to government. For Option 2 it is estimated that the technical work needed to undertake the more comprehensive refresh of the strategy would take 18 months to develop and would then be followed by a nine month period during which it would be consulted on and amended before being approved by the Partnership Board in October 2025. The approval period for Option 2 needs to be longer to take account of the impact of the county council elections in May 2025. A key 'known unknown' for both options is the timing of a general election, which could have an impact on the timeline.

5.5   Another key consideration is the relationship between the transport strategy and the local policies of the Local Transport Authorities. It is important to consider the anticipated new government guidance on the development of Local Transport Plans, which is expected before the end of July 2023. From our engagement through the Transport Strategy Working Group, the feedback received was that a good quality and robust transport strategy that is up to date, is valuable in a number of ways. For example, when it comes to bidding for funding, having a 'golden thread' linking potential schemes to local and regional transport objectives boosts the chances of securing funding.

5.6   In this regard, Option 2 offers a number of benefits. It would provide the opportunity for deeper engagement with the development of the strategy and its associated content by our constituent Local Transport Authorities. In addition, it would enable the potential development of a Best Practice Module in Transport Policy Development as part of TfSE's Centre of Excellence, providing Local Transport Authorities with the opportunity to apply best practice when developing their strategies.

5.7   A final consideration is ensuring that the refreshed transport strategy reflects the change in circumstances that has occurred since July 2020. As mentioned by one of the officers in the Transport Strategy Working Group, the value of this is that while the end destination (our vision) may remain substantially the same, our starting point and the route in front of us is likely to have changed. Having a transport strategy that reflects this change in context is important. There are potentially challenging political circumstances ahead with a general election likely to take place in the latter part of 2024. We need to ensure that we have a robust strategy in place, underpinned by a solid evidence base to be able to continue to make the case for the investment that is needed in the TfSE area. Only the more comprehensive refresh (Option 2) would deliver this. Taking account of all these factors and the additional evidence presented in Appendix 1, members of the Partnership Board are recommended to agree that the more radical approach to the transport strategy refresh (Option 2) is pursued.

6. Financial considerations

6.1   The cost of the refresh of the transport strategy set out in this report would have to be met from grant allocations from the Department for Transport for 2023/24 and 2024/25. The cost of refreshing the transport strategy is comparable with the cost of the production of the transport strategy.

Table 2 - Estimated cost of options to refresh the transport strategy

	Option 1 – Basic Refresh	Option 2 – Comprehensive Refresh	Cost of existing transport strategy *(for reference)*
Estimated cost	£412,100	£645,700	£714,250

7 Conclusions and recommendations

7.1 Members of the Partnership Board are recommended to agree that a refresh of the transport strategy is needed and that it should take the form of a comprehensive refresh (Option 2).

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Appendix 1 – Investigation of options for the approach to the transport strategy refresh

1.   Introduction

The purpose of this appendix is to explore the relative merits of two different ways in which a refresh of the transport strategy could be approached and enable recommendations to be formulated about which approach should be adopted.

2.   The need to refresh the transport strategy

The existing Transport Strategy was adopted by the Partnership Board in July 2020. At the time of adoption, it was intended that the strategy would be updated every 5 years to reflect any changes in context that are of relevance to the strategy. However, a number of significant changes have taken place during the last 2.5 years that necessitate a refresh of the strategy. Futher rationale supporting the need for a refresh is set out in the main report.

3.   Aims and objectives

A scoping exercise was undertaken to identify potential options for refresh of the transport strategy with the following objectives:

- determine the extent of the changes in Government policy that have occurred since the strategy was adopted in 2020 and the potential impact of these changes on the scope of a refresh;
- determine whether there have been significant changes to the evidence base underpinning the adopted transport strategy, based upon the best available evidence;
- determine whether the scenarios that underpinned the existing strategy are still relevant, and;
- come to an evidence-led, informed view of options for delivering a refresh of the transport strategy and a recommend a preferred approach.

The remainder of this Appendix set outs the scoping work that has been undertaken to meet these objectives.

4.   Review of the policy context

The methodology for this work consisted of a review of the objectives of relevant national transport strategy and policy documents, and their associated key performance indicators. The policy documents that were reviewed were as follows:

- [Transport Decarbonisation Plan](#)
- [Bus Back Better](#)
- [Gear Change](#)
- [Williams / Shapps Plan for Rail](#)
- [Levelling Up White Paper](#)
- [Future of Freight Plan](#)
- [Future of Mobility: urban strategy](#)

The objectives of these documents were then compared to the strategic priorities set out in the existing transport strategy. Taking the assumption that the transport strategy was reflective of the wider transport policy environment at the time it was formulated, differences in the relative priority, presence, and understanding of these policy objectives were identified.

The key conclusion from this work was that the national transport policy context within which the transport strategy sits has changed significantly. This is not in terms of the thematic areas that are important to policy making – namely the environment, the economy, and well-being – but in terms of how they are understood. This is summarised in Table 1.

Table 1 - The original strategic priorities in transport strategy, their original interpretation, and additional matters for consideration that have been identified in light of changes in government policy.

Strategic Priority	Original Interpretation in the transport strategy	Additional matters for consideration
Improving the environment	• Reducing carbon emissions from transport • Tackling air quality • Reducing the need to travel • Enhancing biodiversity	• Decarbonising all aspects of travel • Prioritising walking, cycling, and public transport • Decarbonising 'hard to decarbonise' modes through technology
Improved well-being	• Use of healthier modes of transport • Improving access to key public services • Affordable and accessible network	• Levelling Up all areas of the country • Using complimentary policy measures in conjunction with transport to improve access • Consider matters of social justice
Economic growth	• Improved journey times and reliability between major urban centres • Use of digital tech to improve operations	• Improved journey times by public transport • Improved integration, especially with land use planning and public transport • Focus on low carbon tech

This review of policies concluded that:

- **A comprehensive review of the policy landscape relating to transport will be an essential part of any transport strategy refresh**. It is recommended that this covers national, regional, and local policy relating to transport, economic development, planning, and the environment. It should also seek to look at committed plans for spend in addition to the reviewing policies and objectives.
- **Engagement should be undertaken with key stakeholders to gauge their interpretation of both the meaning and relative priority that should be given to these objectives.** This is so that there is a clear understanding of how each of these objectives should be applied in the South East, and agreed priority areas for action that will underpin the delivery of the strategy. For instance, considering decarbonisation, should the priority for action be behaviour change or roll out of new technologies?

5. Baseline Data Gap Analysis

A significant amount of data was collated as part of the production of the existing transport strategy and a suite of technical documents were produced which together formed the evidence base for the strategy. In all cases, they established a baseline of the situation immediately prior to the time of publication of the strategy in 2020. Key technical documents produced by TfSE, such as the transport strategy and the strategic investment plan, were reviewed to identify key data sources used as part of the baseline analysis. A simple method was used to undertake an initial assessment as to whether the baseline situation has changed and identify the most notable data gaps that have manifested themselves. The objectives of this work specifically were to:

- Come to an overall view as to whether the existing transport baseline has significantly shifted; and
- Whether there are any significant gaps in the existing data that forms part of the evidence base for the existing strategy that warrant further consideration as part of any future transport strategy review.

The results of the preliminary data gap analysis indicates that the baseline situation affecting transport across the South East has changed in a number of significant ways, especially in response to the Covid-19 pandemic. The most notable observed changes are as follows:

- Working from home has increased across much of the population. Whilst the high point of working from home as observed in the travel to work data in the Census 2021, may not be a long-term change, and travel to work affects a minority of personal trips, it is likely that working from home will continue play a greater role in regional travel compared to when the transport strategy was adopted;
- The South East has been characterised by increases both in the local population and in the number of jobs provided locally, whilst commuting to, and jobs within, central London have decreased; and
- Carbon emissions from local transport have significantly reduced on a per capita basis, though this is likely an impact of restrictions on movement associated with Covid-19 as opposed to radical changes resulting from new transport policies.

Despite these implications that there has been a shift in the baseline situation compared to when the transport strategy was adopted, a number of significant issues and data gaps were identified. These included the following:

- Data on the long term impacts on travel of the Covid-19 pandemic are currently unavailable outside of academic literature, with no significant cohort studies (interviewing the same participants over a period of time) being undertaken in the TfSE area;
- Outside of movements through major international gateways, such as ports and airports, data on changes to freight movements across the region is sparse and not of a sufficient quality to gain useful insight;
- Whilst there is a reasonable coverage of activities in relation to transport movements, what is less well understood across the TfSE and indeed nationally, is the link between transport and the strategic goals and outcomes that are being sought. A number of notable gaps where either evidence is lacking or evidence is limited include the links between transport investment and the following:
  - o decarbonisation;
  - o social exclusion;

- o equity;
- o economic growth;
- o improved wellbeing;
- The assumptions underpinning the data analysis that has been done in support of the transport strategy needs to be made clearer.

The preliminary data gap analysis concluded that as part of any refresh of the transport strategy, there are critical gaps that would need to be filled in order to develop a robust strategy. As far as possible they would be filled as part of any data collection/collation exercise but would also need further evidence gathering and stakeholder engagement to try and evidence the links between transport issues and the strategic goals and outcomes identified above.

6. Review of future scenarios

As part of its transport strategy, a series of scenarios were developed to understand what the future of the South East could look like. A number of key stakeholders were involved in the development of these scenarios that considered different possible and plausible futures. A preferred Sustainable Route to Growth Scenario was identified as part of this process which was then used to generate the 2050 vision for the transport strategy, which in turn informed its goals and strategic priorities. This enabled the transport strategy to follow a 'plan and provide' approach rather than the traditional 'predict and provide' approach. The future scenarios were as follows:

- London Hub;
- Digital Future;
- Our Route to Growth;
- Sustainable Future;
- Sustainable Route to Growth (the preferred scenario).

At its core, scenario planning is a technique for exploring the uncertainty associated with different futures, ranging from the possible to the probable. The preliminary scenario review assessed the progress against each scenario based on several indicators that are intended to identify whether change is happening that could result in a certain scenario coming true. These results are summarised in Table 2. The key conclusion from this work is that the scenarios underpinning the transport strategy show a mixed picture of being on and off track, with London Hub showing significant indications of being off-track. Furthermore, the outcome of this preliminary assessment suggests that a more comprehensive review of the scenarios may be needed. This is because many of the factors that are driving these scenarios may have changed in the time since the transport strategy was adopted. This does not mean that the scenarios in the original transport strategy are incorrect or unsound. It does however point to the need to sense-check, and if appropriate refresh, the scenarios to ensure they still represent possible or probable futures. Regardless, best practice in transport strategy or policy development suggests that where these are refreshed, so should any previous scenario work that was used to help develop them.

More detailed quantitative and qualitative work is needed as part of the refresh to review the scenarios to understand the degree to which each scenario and driver is on or off-track;

Table 2 - Indicators of change for the scenarios underpinning the Transport Strategy

Indicator	Title	Proxy	Baseline	Latest Figure	RAG rating for each scenario				
					London Hub	Digital Future	Our Route to Growth	Sustainable Future	Sustainable Route to Growth
Indicator	Population Growth	Total population of the TfSE region[1]	7,637,435	7,724,035	🟩	🟩	🟩	🟩	🟩
	Radial travel to and from London	Number of people entering and leaving stations in the TfSE area[2]	343,446,476	167,395,742	🟥	🟩	🟥	🟩	🟩
	Employment in Central London	Number of jobs in central London boroughs[3]	2,113,600	2,245,800	🟩	🟧	🟧	🟧	🟧
	Employment in TfSE area	Number of jobs in the TfSE area[4]	3,395,500	3,434,700	🟧	🟩	🟩	🟩	🟩
	Housing stock	Number of new homes delivered in TfSE area[5]	23,700	23,120	🟥	🟥	🟥	🟥	🟥
	Changes in productivity	GVA per hour worked in the TfSE area	103	104	🟥	🟩	🟩	🟧	🟩

[1] Source: Estimates of the population for the UK, England, Wales, Scotland and Northern Ireland - Office for National Statistics (ons.gov.uk)
[2] Source: Estimates of station usage | ORR Data Portal
[3] Source: Local authority district – Business Register and Employment Survey (BRES): Table 6 - Office for National Statistics (ons.gov.uk)
[4] Source: Local authority district – Business Register and Employment Survey (BRES): Table 6 - Office for National Statistics (ons.gov.uk)
[5] Source: Local authority housing data - GOV.UK (www.gov.uk)

Title	Proxy	Baseline	Latest Figure	RAG rating for each scenario				
				London Hub	Digital Future	Our Route to Growth	Sustainable Future	Sustainable Route to Growth
	(indexed to UK average)[6]			🔴	🟢	🟢	🟡	🟢
Business travel	Average annual number of trips for business purposes per person in the South East[7]	30	10	🔴	🔴	🔴	🔴	🔴
Trip lengths	Average trip length for all purposes in the South East	312	211	🔴	🔴	🔴	🔴	🔴
Inequality and focus on supporting deprived communities	Changes in local authority Index of Multiple Deprivation District average rank from 2015 to 2019[8]	13,105	13,129	🟡	🟢	🟡	🟢	🟢
Public transport fares	Price index of bus fares[9]	166	187	🟢	🟢	🔴	🔴	🔴

[6] Source: Regional gross value added (balanced) by local authority in the UK - Office for National Statistics (ons.gov.uk)
[7] Source: Region and Rural-Urban Classification - GOV.UK (www.gov.uk)
[8] Source: DLUHC Open Data : English Indices of Deprivation 2019 - Summaries at Local Authority Level (opendatacommunities.org)
[9] Source: Bus statistics data tables - GOV.UK (www.gov.uk)

	Title	Proxy	Baseline	Latest Figure	RAG rating for each scenario				
					London Hub	Digital Future	Our Route to Growth	Sustainable Future	Sustainable Route to Growth
	Adoption of Connected and Autonomous Vehicles (CAVs)	Number of CAV trials in the South East[10]	0	0	🟧	🟥	🟧	🟧	🟧
	Changes in carbon emissions	Changes in estimated carbon emissions from transport (kt CO2e)[11]	16,295	12,493	🟥	🟥	🟩	🟩	🟩

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[10] Source: What Innovate UK has funded – UKRI
[11] Source: UK local authority and regional greenhouse gas emissions national statistics, 2005 to 2020 - GOV.UK (www.gov.uk)

7.   Options for the transport strategy refresh

To help formulate options on the potential scope of the refresh, TfSE staff undertook interviews with several regional transport bodies to understand the key lessons they had learnt in developing and refreshing regional transport strategies, including discussions with other STBs. The key findings from this engagement were as follows:

- **Understanding the current policy position is important**. This is because it helps to focus efforts on policy areas that need most attention.
- **There is no right way to engage with stakeholders**. How engagement is undertaken is entirely dependent on the circumstances faced by the organisation, although new ideas such as engaging with future generations and subject matter experts are increasingly being trialled.
- **The development of transport strategies needs to be led by the organisation responsible for its delivery**. All organisations took the approach that the development of the strategy itself must be led by their respective organisations. This requires careful management of consultants, in addition to some work being led in-house.

Reviewing best practice guidance, such as the [Guidelines for developing and implementing Sustainable Urban Mobility Plans](#), and the experience of developing the original transport strategy, also informed the development of the options for refreshing the transport strategy.

For this purpose, two options have been developed for consideration.

- Option 1 – basic refresh - an option that seeks to update and the strategy following a sense check to reflect changes that have occurred since it was adopted
- Option 2 - comprehensive refresh - an option involving more extensive work to deliver a more fundamental refresh of the strategy that will remain robust in the face forthcoming political challenges including the outcome of a forthcoming general election.

The content of these two options is summarised in Table 3 and they are then described in greater detail below.

Table 3 - Summary of the options for a refresh of the transport strategy

	Option 1 – basic refresh	Option 2 – comprehensive refresh
Main Characteristics:	• Update of existing evidence base with latest data • Limited review of future scenarios • Sense-check of current vision • Limited updates to policies • Engagement with stakeholders to 'check in' on strategy development at key stages • Full 12 week public consultation	• Updated evidence based on outcomes, e.g. decarbonisation, economic growth, Levelling Up • Refresh and update future scenarios • Refresh of the vision based on new scenarios and data collection • Extensive engagement with key stakeholders to 'co-create' the strategy, including engagement with subject matter experts to develop policies, • Targeted support for local authorities on strategy alignment with local transport plans • Full public 12 week public consultation
Primary Output:	Updated amended transport strategy	Fully revised transport strategy and supporting technical documentation
Anticipated delivery timescale:	12 month development period to consultation draft	18 month development period to consultation draft

Regardless of which option is chosen, the delivery of the transport strategy refresh will consist of a number of work packages, the actions and outputs of which will vary between the options. These work packages are as follows:

- Scoping and mobilisation;
- Review of the policy context;
- Data collection, collation and analysis;
- Future scenario review;
- Review of vision, goals and strategic priorities;
- Stakeholder and community engagement;
- Strategy development and action planning;
- Programme and project management;

Option 1- basic refresh

High level summary:
An option deliverable within a shorter timescale with a lower level of external supplier resources and lower cost. What is delivered is acceptable quality, focussing on refreshing the existing content of the transport strategy. However, the outputs may not be robust enough in the face of potential political risks (e.g. general election).

This option involves the minimum amount of technical work deemed necessary to achieve the objectives of the transport strategy refresh.

What is most critical is developing an early understanding and consensus as to how the existing transport strategy vision and objectives are being interpreted. This is so there is a common understanding amongst our key stakeholders as to what the vision means, and its implications for our work.

Table 4 outlines the key work packages, tasks, and deliverables for this option. A high level timeline for the development and approval of the strategy if this option were adopted is shown in Appendix 2. This shows that the technical work to develop and draft the strategy would be completed in 12 months followed by a further 8 month period during which the strategy would be subject to a full public consultation, updated to reflect the feedback received during the 12 week public consultation. The final strategy would be approved by the Partnership Board in March 2025, after which it would be submitted to Government.

Table 4 - Summary of Work Packages for Option 1

Work Package	Key tasks	Deliverables
Scoping and Mobilisation	• Confirm scope of technical work for consultants and procure • Produce stakeholder engagement plan • Agree timeline and work plan • Establish project management arrangements	• Consultants brief • Stakeholder engagement plan • Risk register • Project execution plan • Project management documentation
Data Collation and Analysis	• Undertake data collation and analysis, focussing on decarbonisation, social exclusion, equity, economic growth, wellbeing, the future of mobility, and freight • Produce analysis report • Undertake statutory assessments	• Data Analysis Report • Statutory Assessment Reports (Draft and Final)
Scenario Review	• Identify list of KPIs and undertake data collection to determine whether scenarios are on or off track • Identify implications for the objectives and policies contained within the transport strategy	• Report on the continued validity of the future scenarios and implications for the transport strategy
Vision, Goals and Strategic Priorities Refresh	• Organising visioning workshops with key stakeholders • Prepare report on stakeholder workshops	• Report on vision and objectives, and recommendations for any changes

Work Package	Key tasks	Deliverables
Stakeholder and Community Engagement	• Establish Stakeholder Reference Group • Consult on Issues Papers • Workshops with key stakeholders throughout the development of the strategy (x12 assumed) • 12 week formal consultation period on Draft Transport Strategy and technical assessments	• Issues Papers • Engagement Reports • Public consultation report
Strategy Development and Action Planning	• Create a long list of policies to test • Refine policies following further engagement •	• Draft Transport Strategy • Final Transport Strategy • Draft Integrated Sustainability Appraisal • Final Integrated Sustainability Appraisal
Programme and Project Management	• Create and keep to date project documents • Establish appropriate project meetings for appropriate dates and times • Provide appropriate project updates to key TfSE staff and stakeholders as required	• Project documentation (PID, Project Plan, Risk Register etc.)

The delivery structure for the project is summarised in Figure 2. In summary, the main strategic decision making responsibilities associated with the transport strategy will rest with the Senior Officer Group and the Partnership Board. A TfSE core project team will deliver the technical work with the support of a consultant. The Transport Strategy Working Group and a newly-formed Stakeholder Advisory Board will act in an advisory capacity to the technical team.

Figure 1 - Overview of delivery structure for Option 1
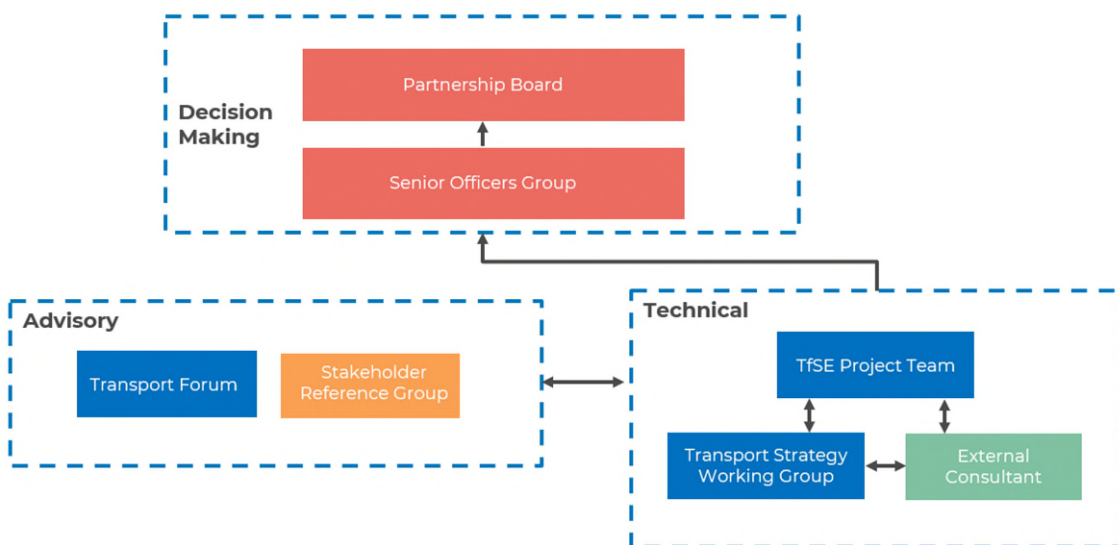
A strengths, weaknesses, opportunities and threats (SWOT) analysis of this option has been undertaken, and is summarised in Figure 3. What this reveals is that this option is the lowest cost option. However, what will result is essentially an updating of the existing transport strategy to the minimum requirements of doing so, with relatively minimal stakeholder engagement.

Figure 3. SWOT analysis of Option 1 – basic refresh

Strengths	Weaknesses
• Achieves required output for the development of the transport strategy • Lowest cost option • Reduced level of technical work means more rapid delivery	• Unlikely to reflect transport strategy requirements from emerging LTP guidance • Stakeholder and community engagement in development stage limited to 'show and tell'. • Best practice in transport strategy making not being met in some areas
Opportunities	**Threats**
• Focussed data collection on outcomes provides the missing link between strategy and impact • Come to common ground on understanding of the vision and objectives of the transport strategy	• Lack of meaningful stakeholder engagement resulting in transport strategy being challenged • Limited scope of review of scenarios and data collection resulting in limited scope of refresh, making new strategy unsuited to new and changing context • Strategy not robust in the face of forthcoming political risks (e.g. general election)

Option 2 – comprehensive refresh

> **High level summary**
> An option that will deliver a high quality transport strategy based on a strong ethos of 'co-creation'. It would involve updating the evidence based to focus more on the outcomes that are being sought, e.g. decarbonisation, economic growth, Levelling Up
> It will be the more expensive option. However, the outputs should be robust enough in the face of forthcoming potential political risks (e.g. general election).

This option constitutes what is best practice in terms of all aspects of regional transport strategy development. Much of the technical work associated with this option is standard for the delivery of many transport strategies, with additional work in the following areas:

- Refresh of the Vision, Goals and Strategic Priorities based upon engagement with stakeholders and a refresh of the future scenarios. Refresh of the existing transport strategy, supported by a broader conversation with key stakeholders to understand the meaning of this vision;
- Focussing data collection and collation on key outcome areas, utilising expertise of subject-matter experts supported by technical research undertaken by consultants;
- Review and then full refresh of the current future scenarios, Stakeholder and Community Engagement focussing on delivering a co-design approach to the scenarios, data analysis, and strategy development and action planning;

- Strategy Development and Action Planning focussing on adding to existing action plans based on new focus areas;
- An additional work package focussed on creating a Centre of Excellence module in alignment of transport policies and strategies;

Table 5 outlines the key work packages, tasks, and deliverables that constitute this option. A high level timeline for the development and approval of the strategy if this option were adopted is shown in Appendix 3. This shows that the technical work to develop and draft the strategy would be completed in 18 months followed by a further 9 month period during which the strategy would be subject to a full public consultation, updated to reflect the feedback received during the 12 week public consultation. The final strategy would be approved by the Board in October 2025, after which it would be submitted to Government.

Following engagement with the Transport Strategy Working Group, an additional work package has been identified, focussing on establishing a best practice module in transport strategy development as part of the centre of excellence. This intends to focus on developing capabilities within local transport authorities to support the development of their LTPs, specifically on aligning policy objectives.

*Table 5 - Summary of work packages for Option 2 – comprehensive refresh*

Work Package	Key tasks	Deliverables
Scoping and Mobilisation	- Undertake review of policy maturity in transport-related areas - Engage with potential partners and secure support for working groups - Confirm scope of technical work for consultants and procure - Finalise Engagement Plan for the Transport Strategy Refresh - Agree timeline and work plan - Establish Project Meetings and supporting resources	- Shortlist of Working Group participants - Consultants brief - Updated project management documentation
Data Collection, Collation and Analysis	- Undertake data collection, collation and analysis, focussing on decarbonisation, social exclusion, equity, economic growth, wellbeing, the future of mobility, and freight - Produce analysis report	- Data Analysis Report - Statutory Assessment Reports (Draft and Final)

Work Package	Key tasks	Deliverables
Scenario Review	• Identify list of KPIs and undertake data collection to determine whether scenarios are on or off track • Identify implications for the objectives and policies contained within the transport strategy • Horizon scanning to identify key signals of change • Trend analysis of significant trends likely to impact the future of transport across the South East • Driver mapping to understand how these different trends interact with each other • Scenario creation based upon axes of uncertainty and developing the scenario narrative • Use of SEELUM to understand implications of each scenario of the transport network	• Report on the continued validity of the future scenarios and implications for the transport strategy • Draft Scenarios Report • Final Scenarios Report
Refresh Vision, Goals and Strategic Priorities	• Prepare, and share with key stakeholders, paper on our interpretation of the vision • Seek feedback on the paper • Organising visioning workshops with key stakeholders • Prepare report on stakeholder workshops	• Report on vision and objectives, and recommendations for any changes
Stakeholder and Community Engagement	• Establish Working Groups with subject matter experts on decarbonisation, social exclusion, equity, economic growth, wellbeing, the future of mobility, and freight • Provide technical support for Working Groups • Support Working Groups in writing issues papers, and refining issues papers into policy recommendations • Consultation with stakeholders on issue papers prepared in the Data Collation and Analysis Work Package • Establish Stakeholder Reference Group • Consult on Issues Papers • Workshops with key stakeholders throughout the development of the strategy (x12 assumed) • 12 week formal consultation period on Draft Transport Strategy and technical assessments	• Issues Papers • Engagement Reports • Public consultation report

Work Package	Key tasks	Deliverables
Strategy Development and Action Planning	• Create a long list of policies and measures • Define packages of measures • Formulate policies • Agree funding, priorities, responsibilities, and timeline • Undertake model runs of SEELUM model	• Draft Transport Strategy • Final Transport Strategy • Draft Integrated Sustainability Appraisal • Final Integrated Sustainability Appraisal
Best Practice Module	• Undertaking primary research of best practice examples of strategy alignment • Undertake research with local transport authorities on the most effective learning tools • Develop learning tools and module content • Test learning tools and module content • Publish and promote module content and learning tools	• Learning tools and module content
Programme and Project Management	• Create and keep to date project documents • Establish appropriate project meetings for appropriate dates and times • Provide appropriate project updates to key TfSE staff and stakeholders as required	• Project documentation (PID, Project Plan, Risk Register etc.)

The delivery structure for the project is summarised in Figure 4. A significant change in approach is the use of working groups to feed into the technical work of the strategy. This takes this traditionally advisory role and shifts it towards a co-creation approach. As shown in Figure 4, a number of subject matter working groups would be established comprising key stakeholders and subject matter experts. These groups would be focussed on addressing the key outcomes that the strategy is seeking to achieve on issues such as decarbonisation, economic growth and Levelling Up. To deliver such a comprehensive programme of work will necessitate a closer process of developing the strategy with a core project team of TfSE and a consultant. TfSE would retain ultimate decision making authority, and be responsible for programme management, stakeholder engagement, and the writing of the strategy. The consultant will lead on the technical work and provide support for engagement.

Figure 2 - Overview of delivery structure for Option 2 – comprehensive refresh
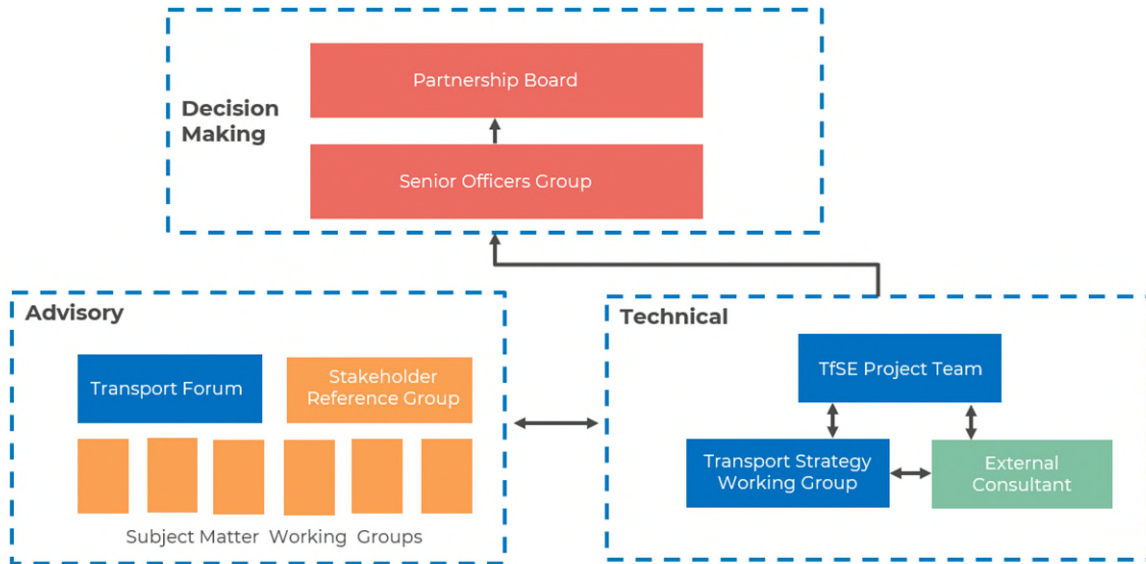
A SWOT Analysis of this option has been undertaken and is summarised in Figure 5 below. What this reveals is that although this option is a higher cost option, it will produce a technically robust strategy, based on co-creation, and providing dedicated support to local transport authorities as they develop their local transport plans.

Strengths	Weaknesses
• Development of up-to-date and technically robust transport strategy reflective of current situation • Reflects emerging guidance and best practice, especially regarding carbon reduction quantification • Strong emphasis on co-creation with stakeholders • Robust in the face of political risks (e.g. general election)	• Most resource intensive way of developing a strategy • Likely to be the highest cost in terms of strategy development • Data collection will be significantly impacted by legacy impacts of COVID-19
Opportunities	**Threats**
• Potential to provide best practice in transport strategy policy making • Establishment of a best practice module in strategy development – focussing on aligning policy objectives • Potential to utilise subject matter experts to develop better strategic policy	• Stakeholder engagement strategy has higher risk of lack of engagement, especially from subject matter experts

9. Costing of different options

A summary of the total anticipated costs of each option are in Table 6. These costs are based upon a median contractor rate under the ESPO Procurement Framework and on the assumption that one full time member of staff at TfSE will be working on the transport strategy (their costs are not included).

Table 6 - Estimate cost of options to refresh the transport strategy

	Option 1 – Basic Refresh	Option 2 – Comprehensive Refresh	Cost of existing transport strategy *(for reference)*
Estimated cost	£412,100	£645,700	£ 813,748

Option 2 is the higher cost option, as more technical work will be required to deliver it. A significant component of the cost of the current strategy was related to the development of the South East Economy and Land Use Model (SEELUM). Although this cost will not be incurred as part of the refresh, additional allowance has been made in Option 2 for the cost of the co-design approach to the development of the strategy involving more work with stakeholders. Additional allowance has also been made in both options for the analysis of the results of the consultation, specifically the work involved in producing responses to the individual comments received.

10. Discussion

Consideration of relative merits of the two different ways in which a refresh of the transport strategy could be approached enables recommendations to be formulated about which approach should be adopted for delivery.

It is clear that there have been significant changes in the national policy context since the adoption of the transport strategy in 2020. Since then, a significant number of new policy documents have emerged on transport, levelling up, planning, and environmental policies amongst others. Whilst a basic refresh (Option 1) would pick up the key messages from these documents, what is important is how the meaning in a number of policy areas has significantly shifted since the adoption of the transport strategy. Consequently, even if the objectives as read may appear the same, the policy direction and meaning has shifted. A basic refresh (Option 1) with a high level policy review would likely miss such changes and their implications for the transport strategy. However, these would be identified through a more comprehensive refresh (Option 2).

The preliminary review of the scenarios, and the data gap analysis exercise, also indicate that there have been significant changes in the travel market and the economic profile of the TfSE area resulting from the impact of COVID-19 and Brexit. As a consequence there could be a significant shift in the way that the future scenarios developed to help formulate the 2050 Vision for the current transport strategy could play out. The basic refresh (Option 1) would involve a sense-check of the current data and the existing scenarios. However, based on the evidence collected to date, such work would likely recommend that the understanding of the current situation and future scenarios are not sufficient to full inform a refresh of the transport strategy. This would be addressed through the more thorough approach proposed for Option 2.

There would be a significant difference between the amount of engagement that would take place under the two different options. The basic refresh (Option 1) would involve the minimum level of engagement required in order to develop and approve the strategy using a 'show and tell'

approach. This approach carries a significant risk of developing insufficient buy-in of key stakeholders as part of the strategy. This could lead to issues down the line during the public consultation and strategy sign off stages. The comprehensive refresh approach (Option 2) provides a number of benefits. The 'co-creation' approach would be specifically targeted at a number of outcome areas. These would include areas where the transport strategy is currently less well developed but also areas that are taking on an increasing priority both nationally and locally such as decarbonisation and Levelling Up. Under this option, subject matter experts (anticipated to be a mix of industry, academia and local authority) would be used help to plug data gaps and to provide evidence and direction on key outcome areas such as the relationship between transport investment and decarbonisation, economic growth and social inclusion. The result would be a better informed strategy, combined with the improved engagement with key stakeholders. This would make for a higher quality transport strategy, that when aligned with new local transport plans will provide a comprehensive policy framework within which to seek funding for future transport schemes in the region.

A final consideration is the value of the strategy development work to local authorities. Based on feedback from the Transport Strategy Working Group, two matters of most concern are the alignment with new local transport plans (including those to be developed following the publication of new guidance) and to maximise the opportunity to secure future funding ensuring that there is a 'golden thread' between the objectives of the transport strategy and those set out in local transport plans.

Under the basic refresh option (Option 1), there would be very limited additional value to local authorities from the development of the strategy outside of existing processes and guidance. Under the comprehensive option (Option 2), it is proposed that a 'best practice' module would be developed as part of TfSE's Centre of Excellence, to provide useful tools and identify best practice in developing local and regional transport strategies.

11.   Recommendations

It is recommended that the comprehensive refresh option (Option 2) for the refresh of the transport strategy is taken forward, subject to further detailed scoping, for the following reasons:

- Evidence collected indicates that the policy context, as well as changes in the current transport situation and indications of change affecting the future scenarios, prompts the need for a more comprehensive refresh.
- The comprehensive refresh would result in a more robust transport strategy reflecting the significant contextual changes that have affected transport in the TfSE area since 2020.
- An approach to developing the strategy based on co-creation using working groups in specific subject areas will develop a sense of ownership, provide for positive stakeholder input, and fill known evidence gaps.
- The approach proposed offers value to local transport authorities in supporting the development of their local transport plans and provides the opportunity to align with emerging best practice in LTP guidance.

Appendix 2 – Indicative timeline for development of transport strategy refresh – Option 1 basic refresh

Appendix 3 – Indicative timeline for development of transport strategy refresh – Option 2 comprehensive refresh