

TRANSPORT COMMITTEE

**MEETING TO BE HELD AT 11.00 AM ON FRIDAY, 5 JULY 2019
IN COMMITTEE ROOM A, WELLINGTON HOUSE, 40-50 WELLINGTON
STREET, LEEDS**

A G E N D A

- 1. APOLOGIES FOR ABSENCE**
- 2. DECLARATIONS OF DISCLOSABLE PECUNIARY INTERESTS**
- 3. EXEMPT INFORMATION - POSSIBLE EXCLUSION OF THE PRESS AND PUBLIC**

There are no items requiring the exclusion of the press and public.

- 4. MINUTES OF THE MEETING OF THE TRANSPORT COMMITTEE HELD ON 10 MAY 2019**
(Pages 1 - 8)

For Decision

- 5. GOVERNANCE ARRANGEMENTS**
(Pages 9 - 24)
- 6. SCHOOL BUS GUIDELINES**
(Pages 25 - 52)
- 7. WEST YORKSHIRE BUS ALLIANCE**
(Pages 53 - 84)
- 8. PRESENTATION OF CORE BUS NETWORK FOR CUSTOMERS**
(Pages 85 - 88)
- 9. TRANSPORT SERVICES BUDGET UPDATE**
(Pages 89 - 92)

For Information

- 10. LOCAL INDUSTRIAL STRATEGY**
(Pages 93 - 98)
- 11. LEEDS CITY REGION TRANSPORT UPDATE**
(Pages 99 - 156)
- 12. LOCAL CYCLING AND WALKING INFRASTRUCTURE PLANS**
(Pages 157 - 164)
- 13. SCRUTINY ANNUAL REPORT 2018- 19 AND STATUTORY GUIDANCE**
(Pages 165 - 184)
- 14. SUMMARY OF TRANSPORT SCHEMES**
(Pages 185 - 188)

Signed:

A handwritten signature in black ink, appearing to be 'BAM', with a horizontal line underneath it.

**Managing Director
West Yorkshire Combined Authority**

**MINUTES OF THE MEETING OF THE
TRANSPORT COMMITTEE
HELD ON FRIDAY, 10 MAY 2019 AT COMMITTEE ROOM A,
WELLINGTON HOUSE, 40-50 WELLINGTON STREET, LEEDS**

Present:

Councillor Kim Groves (Chair)	Leeds City Council
Councillor Martyn Bolt (Leader of the Opposition)	Kirklees Council
Councillor Kayleigh Brooks	Leeds City Council
Councillor Neil Buckley	Leeds City Council
Councillor Peter Caffrey	Calderdale Council
Councillor David Dagger	Wakefield Council
Councillor Michael Ellis	Bradford Council
Councillor Manisha Kaushik	Kirklees
Councillor Hassan Khan	Bradford Council
Councillor Taj Salam	Bradford Council
Councillor Daniel Sutherland	Calderdale Council
Councillor Kevin Swift	Wakefield Council
Councillor Al Garthwaite	Leeds City Council
Councillor Michael Johnson	Bradford Council
Councillor Peter McBride	Kirklees Council
Councillor Alex Ross-Shaw	Bradford Council

In attendance:

Rob McInstosh	Network Rail
Robin Miller-Stott	Transport for the North
David Hoggarth	Transport for the North
Graham Meiklejohn	Transpennine Express- Minute 92 only
Dave Pearson	West Yorkshire Combined Authority
Liz Hunter	West Yorkshire Combined Authority
Megan Hemingway	West Yorkshire Combined Authority

87. Chair's Comments

The Committee was advised that a number of its members had lost their seats in the recent elections. Tribute was paid to Councillor Eric Firth, Vice Chair of the Transport Committee who had given great support to the Chair over the last year. Also thanks was made to Councillor Peter Dew who has been a member of York Council and involved in a number of transport schemes.

Councillor Peter McBride also acknowledged the contribution made by Councillor Firth, as a long term member of the Committee who was universally liked and respected. Further thanks was made by all members.

The Chair took the opportunity to congratulate Councillor McBride on his appointment as Deputy Kirklees Council Leader.

88. Apologies for absence

Apologies for absence were received from Councillor Peter Box.

89. Declarations of disclosable pecuniary interests

There were no disclosable pecuniary interests declared by Members at the meeting.

90. Exempt information - possible exclusion of the press and public

Resolved: That in accordance with paragraph 3 of Part 1 of Schedule 12A to the Local Government Act 1972, the public be excluded from the meeting during consideration of **Appendices 1, 2, and 3 of Item 9** on the grounds that it is likely, in view of the nature of the business to be transacted or the nature of the proceedings, that if members of the press and public were present there would be disclosure to them of exempt information and for the reasons set out in the report that in all the circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information.

91. Minutes of the meeting of the Transport Committee held on 15 March 2019

Resolved: That the minutes of the Transport Committee held on the 15 March 2019 be approved.

92. Rail Matters Affecting West Yorkshire

The Committee considered a report which provided an update on rail matters affecting West Yorkshire.

Network Rail gave an update to the Committee, acknowledging what had been a difficult 12 months. There had been many lessons learned from the May 2018 timetable problems, which demonstrated that, as it is such a major hub, congestion issues at Leeds have an impact on rail performance both regionally and nationally. Network Rail are very aware of the impact felt by passengers and communities and in all future planning Leeds is viewed as having a national significance and profile.

Members were updated on the work being undertaken on the new platform zero at Leeds. The strategic planning team are working with West Yorkshire Combined Authority and Transport for the North (TfN) in looking at what requirements are needed to deliver the franchise commitments and developing cases for funding from the Department for Transport (DfT).

From June 2019 there will be a new structure at Network Rail, taking the number of route based departments from 8 to 13, in order to better reflect local alignment of strategy and to work more effectively with local needs and communities.

Members welcomed the change of the network organisation, commenting that this was a recommendation also made by Richard George in his review. Members asked what actions were being taken on his other recommendations. It was confirmed that the review is with the DfT but that Northern had chosen to implement some things ahead of their guidance/ comments.

The following points were also raised:

- Northern and Network Rail are working to improve the efficiency of the Neville Hill Depot
- Working with LNER to improve signalling
- Working with Northern and TPE to optimise roll out of new rolling stock
- Planning for the May and December 2020 timetable changes is already underway

Network Rail hold bi-weekly meetings with train operators regards timetable changes to ensure more stability and to accommodate implementation of new rolling stock. Members asked when they would know if there was an issue regards the December timetable and were informed that planning would mean there were no surprises. There is also independent assurance taking place to ensure that Network Rail's assumptions are realistic and have contingency.

Members queried point 2.11 in the report which identified the importance of the extension to Platform 17 Leeds to addressing overcrowding of trains serving the Wakefield district and asked what is planned. Network Rail acknowledged this but were unable to confirm works planned due to it being a technically challenging project and being considered as part of the larger scheme of infrastructure works, for which a bid for funding had to be made. There will be an update at the end of the Summer 2019.

The Chair stressed that the increase to capacity at Leeds Station was of key importance to deliver services throughout the region. Other schemes also require support from Network Rail to ensure implementation such as the new stations at Elland, White Rose and Leeds Bradford Airport. Network Rail acknowledged they will work with the Combined Authority to support infrastructure development.

The poor access at Mirfield station was also raised and Network Rail informed members that Mirfield is part of the planned Trans Pennine Upgrade with a new fully accessible station is planned. Members requested that Network Rail work more closely with the districts. The Chair reminded Members that the Rail Operators forum is also an opportunity to discuss any disruption to highways.

The Chair thanked Network Rail for the update and welcomed that they will attend the Committee on a potential quarterly basis.

Graham Meiklejohn from Trans Pennine was invited to comment on points 2.35/ 2.36 in relation to rolling stock. Members were informed that the Nova 3 fleet had been accepted by Trans Pennine and drivers were undertaking training. Rolling stock will be introduced in December 2019- May 2020 timetables. There will however be a short term impact on the ability to 'strengthen' peak services to six car operation until the end of July 2019 due to this.

Resolved:

- (i) That the Committee notes the progress being made on rail matters affecting West Yorkshire as presented in the report.
- (ii) That the Committee urged the Department of Transport and Network Rail to prioritise the technical capacity analysis needed to determine the rail network requirements in and around central Leeds necessary to bring clarity on the investment required to deliver committed service improvements and accommodate growth across the City Region.
- (iii) That the Committee endorsed the activity necessary to prioritise the importance of addressing rail network capacity in and around central Leeds for improved services across the Leeds City Region and beyond, and the need for ongoing activity to make a strong case for investment by working with the rail industry and Transport for the North to make sure this is reflected in investment plans.

93. Transport for the North Update

The Committee considered a presentation on the role and remit of Transport for the North (TfN), the Strategic Transport Plan and the Investment Programme.

TfN gave an overview of their remit as a sub national transport body and p outlined the Transport Strategic Plan submitted to Government.

Key points were as follows:

- Inclusive growth is key and the North needs a world class infrastructure
- A recent review had highlighted that transport was an obstacle to growth
- The movement of goods and services was important, not just movement of people
- Need to get more people on public transport
- Ambitious target of a zero carbon public transport network by 2050
- Lack of investment in the East- West corridor needed to be addressed
- Smart integrated ticketing network is required
- Supporting local station plans
- Investment in major road networks

TfN are seeking devolution of an investment programme to the North rather than having to bid to Government. This would enable implementation of multi-modal schemes and the North to have a better say over investment in the future.

The Chair welcomed TfN's presentation and their attendance at the Committee. She invited TfN to work with the Committee and West Yorkshire Combined Authority as the Transport Authority. It was also requested that TfN work with Portfolio Holders in the districts.

Members made the following comments:

- Some road schemes may not help the achievement of the carbon reduction targets
- There is a need for TfN to align to the Transport Authority's key priorities, specifically in relation to upskilling and better jobs
- Corridor improvements need to be clearer- For example there were questions raised about a road from Bradford to the airport
- Volumes of traffic on the M62 a concern
- The cross pennine routes via Keighley and Skipton A56/ A59 / A6068 are key routes with a lack of resilience
- More information was required in relation to rail freight issues
- Measurable outcomes need to be brought to future meetings so Members can look at progress
- The scope of transport is vast and the impact on skills and regeneration is equally large
- There needs to be more 2-way communication between elected members and TfN
- Multi-modal contactless travel payment is required

TfN informed Members that Highways England are looking at improvement work and some of the above may fall into this remit. Improvements could be road or rail and TfN are aware that Highways England are exploring an M65 extension possibility.

As a new body they are keen to work with the industry to support the delivery of the Strategic Transport Plan. They acknowledged that development of stations are an issue in the current industry structure and work has to be done collaboratively.

Resolved: That the Transport Committee welcomed Transport for the North's attendance at the meeting and agreed to invite Transport for the North to subsequent meetings to engage Members on the details of their work programme.

94. DfT 'Call for Evidence' on Light Rail and Other Rapid Transit Solutions

The Committee considered a report which provided the context of the West Yorkshire Combined Authority's response to the Department for Transport's recent 'call for evidence' around the various forms of 'light rail'.

Members were appraised of the high level principles of the Combined Authority's response and invited to discuss these. Point 2.12 in the paper will form the basis of the response.

The Chair highlighted the need for finance and systems that meet the social fabric of West Yorkshire.

Resolved: That the Transport Committee noted the 'call for papers' and endorsed the principles of the West Yorkshire response to the 'call for evidence'.

95. Zero Emission Transport Working Group

The Committee was informed that it was proposed there be nominations from both the Transport Committee and Green Economy Panel to work together in a 'Zero Emission Transport Working Group'.

The first working group would be held in June/ early July 2019. Due to changes to membership it was proposed that the Transport Chair attend in the interim and note the current members who are interested from the committee.

Resolved:

- (i) That the contents of the report were noted and comments provided.
- (ii) That the Transport Committee agreed to nominate members to be part of the working group.
- (iii) That the Transport Committee agreed to nominate a Chair for the working group.

96. West Yorkshire Bus Alliance Update

The Committee was updated on progress made so far in developing the West Yorkshire Bus Alliance.

It was noted that the formal agreement and work plans will be brought to the next meeting, along with the underpinning legal agreement.

Resolved: That the Committee noted the progress made in developing the West Yorkshire Bus Alliance and a report be submitted to a future meeting setting out the terms of a Voluntary Partnership Agreement.

97. Summary of Transport Schemes

The Committee considered a report which provided an update on the transport related schemes considered by the West Yorkshire and York Investment Committee.

Members noted the various projects.

Resolved: That the report be noted.

98. Transforming Cities Fund

Members were given a presentation on the approach, ahead of submission for the Transforming Cities Fund. Members discussed the proposed content of the bid to the Future Mobility Zone element of the Fund. It was noted that it is a two stage bidding process, with May 2019 being the date for submitting an Expression of Interest and then if successful a full bid could be developed over the summer.

It was noted that it is a very competitive fund, for which Mayoral authorities can also bid. However, it is felt that the West Yorkshire Combined Authority bid is strong, linking communities and demonstrating rural-urban interplay.

Resolved:

- (i) That Transport Committee noted the risks associated with the Tranche 2 'big bid' set out in Appendix 2.
- (ii) That Transport Committee endorsed the approach for the Tranche 2 'big bid' outlined in Appendix 1 and noted that there are further member working groups and conversations with Leaders around the finalised scope, ahead of submission of the draft SOBC submission to DfT officers on 20 June.
- (iii) That Transport Committee endorsed the approach that an Expression of Interest be submitted for a Future Mobility Zone for region by 24 May 2019 as outlined in Appendix 3.

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Report to: Transport Committee

Date: 5 July 2019

Subject: **Governance Arrangements**

Director: Angela Taylor, Director of Corporate Services

Author(s): E Davenport

Is this a key decision?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	

1. Purpose of this report

- 1.1 To advise Transport Committee of the Committee's terms of reference approved by the West Yorkshire Combined Authority (the Combined Authority) at the Annual Meeting, and of appointments to the Transport Committee.
- 1.2 To appoint District Consultation Sub-Committees, their members and Chairs.
- 1.3 To re-establish the Local Bus Working Group and the Cycling and Walking Working Group.

2. Information

Transport Committee

- 2.1 Attached for information as **Appendix 1** to this report are revised **terms of reference** for the Transport Committee, approved by the Combined Authority at its Annual Meeting on 27 June 2019. The terms of reference have been amended to simplify them and ensure they are comprehensive by making a general delegation of transport functions to the committee, rather than delegating specified functions as has been the practice to date. The

delegation remains subject to the exception of functions currently reserved to the Combined Authority as set out in the Officer Delegation Scheme. A reference has also been inserted to securing “clean growth”, to reflect revised corporate priorities. The Transport Committee will continue to progress any scheme under the Leeds City Region Assurance Framework within the Integrated Transport Block of the Capital Programme for which the cumulative total of the financial approval and tolerance threshold is £3 million or under.

2.2 The Combined Authority at its Annual Meeting also appointed:

- Councillor Groves as Chair of the committee,
- Councillor Kaushik as Deputy Chair of the committee,
- Councillor Bolt as leader of the opposition on the committee.

District Consultation Sub-Committees

2.3 It is proposed that Transport Committee re-appoint the five advisory District Consultation Sub-Committees, each acting as a conduit for consultation for one of the five constituent council areas. It is proposed that each member of the Transport Committee co-opted from a constituent council is appointed as a voting member of the relevant Sub-Committee. Members of the public are also invited to attend and speak as public representatives, and elected Members from constituent councils also regularly attend. **Appendix 2** to this report sets out proposed **terms of reference** for the District Consultation Sub-Committees (unchanged from last year). The Transport Committee is also asked to appoint a **Chair** for each committee.

2.4 Proposed **dates of meetings** for the Sub-Committees are set out in **Appendix 3**.

Local Bus Services Working Group

2.5 In previous years, the Transport Committee has also established a Local Bus Services Working Group to provide oversight of the application of the criteria for the supported local bus services and input into the procurement process for tendered services. It is proposed that this Working Group is re-established for this municipal year. **Appendix 4** to this report sets out the arrangements including the **terms of reference** for the Working Group, with minor amendments for updating and clarification highlighted.

Cycling and Walking Working Group

2.6 It is also proposed that the Cycling and Walking Working group is re-established for this municipal year. **Appendix 5** to this report sets out the arrangements including the **terms of reference** for the Working Group.

Zero Emission Transport Working Group

- 2.7 At the May 2019 meeting, Transport Committee resolved to form a joint Zero Emission Transport Working Group comprising members of the Transport Committee and Green Economy Panel. The **terms of reference** for the Working Group were approved by the May Transport Committee.

Officer Delegations

- 2.8 In previous municipal years, Transport Committee were asked to delegate some functions to the Managing Director. However, these functions are now delegated directly to the Managing Director under the Combined Authority's Officer Delegation Scheme, in consequence of the changes to the terms of reference for this committee. No proposals are therefore put forward this year in respect of any delegations to be made by the Committee.

3. Financial Implications

- 3.1 The post of chair of a District Consultation Sub-Committee attracts a special responsibility allowance under the Combined Authority's Members' Allowances Scheme.

4. Legal Implications

- 4.1 The Combined Authority's Procedure Standing Orders (including statutory access to information provisions), apply to meetings of the District Consultation Sub-committees. These provisions do not apply to Working Groups.
- 4.2 Political balance requirements do not apply to the appointment of co-optees to an advisory committee or sub-committee.

5. Staffing Implications

- 5.1 There are no staffing implications directly arising from this report.

6. External Consultees

- 6.1 No external consultations have been undertaken.

7. Recommendations

That the Transport Committee:

- 7.1 Notes the **terms of reference** for **Transport Committee** attached as **Appendix 1** to this report.
- 7.2 Notes the following **appointments** made by the Combined Authority:
- Councillor Groves as Chair of Transport Committee,

- Councillor Kaushik as Deputy Chair of Transport Committee,
- Councillor Bolt as leader of the opposition on Transport Committee.

7.3 Establishes a **District Consultation Sub-Committee** for the municipal year 2019/20 for each constituent council area, with the **terms of reference** set out in **Appendix 2** to this report.

7.4 **Appoints** to the relevant **District Consultation Sub-Committee** each Transport Committee member co-opted from a constituent council as a voting member.

7.5 Appoints a **Chair** for each **District Consultation Sub-Committee**.

7.6 Agrees that each District Consultation Sub-Committee meets on the **dates** set out in **Appendix 3** to this report.

7.7 Re-establishes the **Local Bus Services Working Group** for the municipal year 2019/20, with terms of reference and arrangements as set out in **Appendix 4** to this report.

7.8 Re-establishes the **Cycling and Walking Working Group** for the municipal year 2019/20, with the terms of reference and arrangements as set out in **Appendix 5** to this report.

8. **Background Documents**

None.

9. **Appendices**

- Appendix 1 – Terms of Reference of Transport Committee
- Appendix 2 – Terms of reference for District Consultation Sub-Committees
- Appendix 3 – Proposed meeting dates for District Consultation Sub-Committees
- Appendix 4 - Terms of reference and arrangements for the Local Bus Services Working Group
- Appendix 5 – Terms of Reference and arrangements for the Cycling and Walking working group



Terms of Reference

Transport Committee

The Transport Committee is authorised:

1. In accordance with the policies and strategies set by the Combined Authority, to carry out any transport function¹ of the Combined Authority or any other function related to transport, including
 - any function of the Combined Authority in its role as local transport authority, travel concession authority or transport authority,
 - the exercise of the general power of the Combined Authority under S113A Local Democracy, Economic Development and Construction Act 2009 in relation to these functions, and
 - progressing any scheme under the Leeds City Region Assurance Framework within the Integrated Transport Block of the Capital Programme, for which the cumulative total of the financial approval and tolerance threshold is £3 million or under

with the **exception** of any function which is reserved to the Combined Authority².

¹ Transport functions in this context are to be construed in a broad and inclusive fashion.

² The functions reserved to the Combined Authority are set out in Table A of the Officer Delegation Scheme and include:

- preparing, reviewing, altering or replacing the **Local Transport Plan** (the West Yorkshire Transport Strategy 2040)
- setting a **levy**
- consenting to any **regulations relating to a sub-national transport body**
- consenting to **regulations to borrow**
- publishing an **annual report** on the exercise and performance of transport functions
- functions relating to **road user charging** schemes
- **jointly** (that is, with at least one other local transport authority)
 - approving, varying, revoking or postponing an **advanced quality partnership scheme**
 - making varying or revoking an **enhanced partnership plan**
 - making postponing, revoking an **enhanced partnership scheme**
 - approving varying or revoking an **advanced ticketing scheme**
 - making, varying or terminating a **voluntary partnership agreement**

2. To respond to any report or recommendation from an overview and scrutiny committee³.
3. To advise the Combined Authority in support of its ambition to secure inclusive and clean growth, in relation to any of its transport or transport-related functions.
4. To liaise with the West Yorkshire and York Investment Committee to promote the strategic alignment of regional transport funding investment.⁴

³ of the Combined Authority (in accordance with Scrutiny Standing Orders) or any partner council

⁴ This may be through holding joint meetings with the West Yorkshire and York Investment Committee.

Terms of Reference

District Consultation Sub Committees

In relation to:

- the area of the constituent council and
- local public transport functions

each District Consultation Sub Committee is authorised:

1. To consult with and consider representations from users¹ of local public transport services and facilities.
2. To advise the Transport Committee in relation to:
 - a) the views of users of local public transport,
 - b) service delivery objectives and performance,²
 - c) improving co-ordination between the constituent council and the Combined Authority,
 - d) the progress of planned projects and programmes, and
 - e) any proposal referred to it by the Transport Committee.

¹ Or on behalf of users.

² including performance indicators relating to local bus and rail services, congestion, mode share, air quality, safety and other outcomes identified in relevant Plans and Strategies.

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Calendar of Meetings 2019/20

Month	Day	Meeting	Time
2019			
July	19	Joint DCSC (All Districts)	2pm
October	14	Leeds	2pm
	15	Calderdale	2pm
	17	Wakefield	2pm
	21	Bradford	2pm
	23	Kirklees	2pm
2020			
March 2020	16	Leeds	2pm
	17	Calderdale	2pm
	19	Wakefield	2pm
	23	Bradford	2pm
	25	Kirklees	2pm

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Local Bus Services Working Group – arrangements

Terms of Reference

1. The Working Group is advisory only and has the following functions:-
 - a. To review and advise the Transport Committee on the Combined Authority's criteria for supported bus and their practical application.
 - b. To consider proposals for supported services or to review supported services that have been procured by the Combined Authority.
 - c. To consider and review the tender evaluation and award procedures.
 - d. To consider draft proposals for Area Bus Network Reviews before their consideration by Transport Committee.

Role

2. It is intended that the business and attendance at meetings should be flexible to meet the requirements of the Transport Committee and therefore a formal committee structure is not appropriate.
3. The Working Group is not intended to replace or conflict with the Combined Authority's **Overview and Scrutiny Committee**, and any matter reviewed by the Working Group remains within the remit of that Committee and the Scrutiny Standing Orders.

Membership

4. The Working Group comprises **any number of members of the Transport Committee from time to time** but with the intention that attendees of Working Group meetings will always include a member from any district where the supported services in issue are or would be provided, in the interests of providing local insight.

Meeting arrangements

5. The Working Group will meet as determined by the Chair of Transport Committee in consultation with the Vice Chair and Leader of the Opposition.
6. The Head of Legal and Governance Services will at the request of the Director, Transport Services or Head of Mobility Services, give **notice** of any meeting not in the calendar of meetings.

7. An **agenda** for business to be considered by a meeting of the Working Group will be provided in good time for any meeting.
8. At least **5 working days' notice** of meetings will be given and any members that wish to attend should notify the relevant officer in the Legal and Governance Services team.
9. There is no fixed **quorum** for meetings of the Working Group but it is advisable that:
 - a. at least 3 members shall attend any meetings, and
 - b. at least one member from each affected district should attend any meeting.

If fewer than 3 members indicate they will attend, or if no member from an affected district will attend then the meeting need not be held. If a meeting is not going to be held, then members may make written representations on the papers to the Director, Transport Services if they wish.
10. So far as possible, representatives of **more than one political group** should attend in the interest of balance. There is no legal requirement for political balance to be achieved on working groups.
11. The Working Group is **not a sub-committee**. At any meeting, the members attending may if they wish select one of their number to act as **chair** for the purpose of conducting the business on the agenda. Where a decision is required, such as the terms of any recommendation, then the attendees may vote if there is not clear unanimity. Each attendee shall have one vote and any chair shall not have a casting vote. The views of all members present should be recorded if there is any dispute.
12. If at any meeting there is no **member present from a district affected** by bus service issues or proposals then a recommendation may not be made if it might impact on that district.
13. **Officers** may be called on to attend meetings and provide information, documents and advice to members, if requested, given reasonable notice.
14. Any **recommendations** of the Working Group will be brought before the Transport Committee as soon as practicable, or in the case of urgent matters, be notified to the Chair of the Transport Committee and the Director, Transport Services as soon as possible.
15. As the information discussed at meetings may contain commercial or **confidential information** relating to bus operators and tenders, proceedings of the Working Group shall be kept private and confidential.

16. The **Members' Code of Conduct** of the Combined Authority applies to the members when they are attending this Working Group in their capacity as a member of the Combined Authority. However, the Code does not explicitly extend its requirements in respect of declaring interests to meetings of any Working Group. The Head of Legal and Governance Services has therefore advised that members of the Working Group should treat meetings of the Working Group as if they are a formal committee meeting for the purposes of disclosing interests and not participating in discussion where members have an interest in a matter. This will help members avoid breaching the principles of conduct set out in the Code relating to selflessness, and honesty and integrity. Any declaration or non-participation by a member should be recorded in the minutes for the meeting of the Working Group.

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Cycling and Walking Working Group Arrangements

Terms of Reference

The Working Group is advisory only and with the following functions:-

- a. To review current progress on development of cycling and walking policy and strategy, in particular:
 - progress against West Yorkshire Transport Strategy targets relating to cycling and walking;
 - development of a West Yorkshire Local Cycling and Walking Infrastructure Plan (LCWIP), building upon individual LCWIPs currently being developed by partner councils, to identify future investment requirements for cycling and walking infrastructure;
 - development of more detailed policy on cycling and walking where appropriate;
 - members become champions and promote all West Yorkshire Combined Authority schemes within their districts in conjunction with the Chair.
- b. To discuss emerging issues affecting cycling and walking policy and delivery at a local, regional and national level.
- c. To advise and make recommendations on policy and delivery relating to cycling and walking to Transport Committee and other relevant working groups where appropriate.

The Working Group is not intended to replace or conflict with oversight and review provided by other committees and panels of the Combined Authority, including **West Yorkshire and York Investment Committee** and **Overview and Scrutiny Committee**. Oversight of cycling and walking delivery within individual projects and programmes across the Combined Authority's investment portfolio should be continue to be undertaken through established processes as part of the Combined Authority's Assurance Framework.

The Working Group is not intended to act replace or conflict with consultation processes on individual projects and programmes led by partner councils responsible for delivery.

The Working Group comprises **any number of members of the Transport Committee from time to time** but with the intention that as far as possible, membership reflect as far as possible all West Yorkshire districts and interest in both cycling and walking as individual modes of travel.

The Working Group arranges to meet **quarterly**, but could meet at any time, if appropriate or required to address specific issues identified.

A draft agenda for each meeting is produced by the Combined Authority Transport Policy section for comment by members of the Working Group.

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Report to: Transport Committee

Date: 5 July 2019

Subject: **School Bus Guidelines**

Director: Dave Pearson, Director of Transport Services

Author(s): Steve Wainwright

Is this a key decision?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	

1. Purpose of this report

- 1.1 To consider the adoption of revised guidelines for the provision of Combined Authority funded school bus services.

2. Information

Background

- 2.1. At the May 2018 meeting of the Transport Committee it was resolved to engage with stakeholders on revised guidelines for the provision of school bus services funded by the Combined Authority and that a further report be presented prior to adoption of the guidelines.
- 2.2. This report explains the rationale for the proposed changes to the guidelines, summarises the outcomes from the engagement exercise and sets out the actions that will be taken in response to the feedback received.

Current Guidelines

- 2.3. Under Co-operation Agreements with five West Yorkshire local councils, the Combined Authority organises a range of school transport services. The local Councils fund the transport of school pupils eligible for free transport under its policies. In addition, the Combined Authority subsidises some home-to-school bus services that are procured under the Transport Act for children who are not eligible for free travel under statute or local council policy but where travel to school for these pupils would otherwise be difficult (e.g. excessive journey length, journey's not suitably timed, unsuitable interchange points). These are mainly but not exclusively provided for children attending secondary schools. The net cost (after fares revenue) of providing these services to the Combined Authority is approximately £3 million per annum.
- 2.4. These services are provided under a set of guidelines adopted by the Transport Committee in 2014 (based upon those previously in use by the former Integrated Transport Authority). The guidelines are based on an assumption that children and young people of secondary school age can use the conventional public transport network if it is suitable. A 'reasonableness' test, which is based on government guidance, is used to determine if the available public transport is suitable. The current guidelines are attached as Appendix 1.
- 2.5. The Combined Authority has agreed a revised budget with the five West Yorkshire local councils which will require expenditure on subsidised bus services to reduce from c£18m in 2018/19 to c£15m in 2020/21. A reduction in school transport provision and/or an increase in revenue on school bus services will be necessary to meet the overall savings target. It is therefore important that a reduced availability of funding is targeted at greatest need.

Proposed Guidelines

- 2.6. Whilst the current guidelines are useful in ensuring that provision is only made when there is no suitable alternative bus service, they do not currently take into account the location of the school relative to local Council admission arrangements; some buses are provided to take pupils to schools which are not in their local area. The guidelines do not currently reflect the promotion of active travel options such as walking and cycling. They also do not reflect the differing travel behaviour of older students to those younger pupils.
- 2.7. At the Transport Committee in May 2018 it was proposed that the Combined Authority should engage with parents, schools and other interested parties on a revised set of guidelines with the main changes as follows:
- **Distance from school** – Subsidised school bus services will not normally be provided where pupils are attending a school that is more than four miles (6.5 km) from their home address.
 - **Requests to serve new areas** - Subsidised school bus services will not normally be introduced where currently no public transport link exists.

- **Walking or cycling to school** – Subsidised school bus services will not normally be provided for pupils who live less than 1.5 miles (2.4km) (30 minute walk) from their school.
- **Commercial school bus services** – Subsidised school bus services may be withdrawn where commercial bus operators are willing to provide a service on the basis that parents meet the whole cost of the service.
- **Selective schools** – Subsidised school bus services will not normally be provided where the school admissions policy is based on academic selection.
- **Post-16** – Subsidised school bus services will not normally be provided for young people in the 16-18 age group.

2.8. In addition, there are a number of long established practices and principles that the Combined Authority employs, which were not included in the original guidelines. For completion, these were also included in the proposed guidelines. A copy of the proposed guidelines is attached as Appendix 2.

Engagement Process & Outcome

2.9. The engagement was launched on 1 February 2019 and closed on 15 March 2019. It was hosted on the Combined Authority's Consultation & Engagement portal, Your Voice. This provided information on the proposed changes and enabled parents, schools and other interested parties to provide feedback via an on line questionnaire or by email or post. A summary of the feedback received is attached as Appendix 3. A detailed breakdown can be found at <https://www.yourvoice.westyorks-ca.gov.uk/schoolbuses>. Contact with parents was made via the schools.

2.10. The relevant issues raised by respondents in respect of the proposed changes were:

Distance from school (4 mile radius)

- Public transport journeys inconvenient/unreliable;
- Perceived safety concerns around using public transport;
- Unfair to change provision for existing pupils/students;
- School is allocated rather than selected;
- Discriminates against faith and selective schools;
- Subsidised school bus services should be provided for all pupils/students.

Requests to serve new areas

- Public transport journeys inconvenient/unreliable;
- Perceived safety concerns around using public transport;
- School is allocated rather than selected.

Walking or cycling to school (1.5 miles)

- Safety concerns - lack of suitable infrastructure;
- Comfort/Safety concerns – darkness / inclement weather;
- Personal safety concerns;
- Maximum walking distance is too long.

Commercial school bus services

- Cost prohibitive, particularly for low income families;
- Concerns over the certainty of provision and that operators might exploit the situation when setting fare prices;
- Subsidised school bus services should be provided for all pupils/students;
- Unfair to change provision for existing pupils/students.

Selective schools

- Discriminates against pupils/students attending selective schools;
- Discriminates against low income families;
- Unfair to change provision for existing pupils/students;

Post 16

- Some students in Years 12 and 13 do have a fixed school day;
- Public transport journeys are unavailable or unreasonable;
- Perceived safety concerns around using public transport;
- Subsidised school bus services should be available to all age groups.

- 2.11. Whilst the consultation was live, it was raised by members of the Overview and Scrutiny Committee on 22 March in a discussion about Strategic Transport Priorities. The Committee advised that *“any planned revision of guidelines to the provision of school bus services should take care not to lead to a reduction in services that many students in poorly connected communities rely on or an increase in car usage which would be contrary to strategic ambitions relating to inclusivity, connectivity, clean growth and air quality”*.
- 2.12. Whilst the feedback raises important considerations, most can be addressed by minor changes to the guidelines or in the implementation. It is therefore proposed that the guidelines are adopted with the following amendments and recommendations as to their implementation;
- 2.13. **Distance from school.** The guidelines here are designed to address where parents have chosen preference for a school that is clearly some considerable distance from their home address and where, as a result, the Combined Authority is incurring additional costs. Around 95% of services are within the four mile radius and so this will only apply to a small number of services. Children travelling from outside this area will normally be charged a higher fare to reflect the additional cost of provision. However, the Combined Authority will apply discretion in exceptional circumstances and these include where children live outside but in close proximity to the four mile boundary.
- 2.14. Where it clear that that parents have chosen a school in preference to a number of nearer schools and where this distance significantly exceeds the four mile boundary, parents can be expected to meet additional costs. However, the Combined Authority will ensure, as far as is practical, that the collective cost to parents does not exceed the total cost of provision. In addition, the implementation will be phased and the Combined Authority will work with schools to identify practical ways to assist families living on low

means (normally defined as those in receipt of free schools meals or the maximum working tax / universal credit).

- 2.15. With regard to faith schools, with the exception of St Wilfrid's Catholic School in Wakefield, services to faith schools are funded by the local councils and are not affected by the guidelines. Under the guidelines, discretion will be applied to schools that are in rural or semi-rural areas or serve rural or semi-rural communities. St Wilfrid's Catholic School falls into this category and, therefore, services to this school operating within the Wakefield area will not be affected.
- 2.16. **Requests to serve new areas:** The guidelines here are designed to address the situation whereby parents have chosen to preference a school in full knowledge that there is not a suitable public transport option and subsequently expect the Combined Authority to meet the cost of a new service. The Combined Authority will not fund a service under these circumstances; discussions will however be held with the local Council in respect of new housing developments. Where children are placed at a school that parents have not included in their list of preferences and there is no suitable public transport link, it would be incumbent on the local council to meet the cost of provision.
- 2.17. **Walking or cycling to school:** The purpose of the guidelines in this regard is to prioritise places on school bus services rather than to withdraw them. Currently, places are given to children who might only use the bus, for example, when the weather is inclement. As the Combined Authority takes the revenue risk on these services, this has an impact on the cost of provision. Where children are expected to walk, the Combined Authority will satisfy itself that the route is paved, lit and has pedestrian crossing facilities and that there are no known issues that would render the walk unsuitable. Addresses in rural and semi-rural areas will be considered on a case by case basis with reference to Road Safety GB guidelines as necessary). It is expected that walking distances will be well within the maximum allowable under the guidelines.
- 2.18. **Commercial school bus services:** Although legislation normally requires that the Combined Authority terminates contracts where an operator is prepared to provide a service on a commercial basis, the Combined Authority can continue to provide a subsidised service where it considers this to be in the public interest. The Combined Authority will, therefore, consider these on a service by service basis and will satisfy itself that fare prices are reasonable and that the available capacity, route and timetable meet the needs of passengers before withdrawing any contracted services.
- 2.19. **Selective schools:** The net cost to the Combined Authority of transport to these schools is approximately £200,000 per annum. Although the Combined Authority will no longer meet this shortfall, it will continue to plan, procure and monitor services to these schools and ensure, as far as is practical, that the collective cost to parents is in line with the cost of service provision. The Combined Authority will also work with schools and other interested parties to find practical ways of assisting families who are on low means.

- 2.20. **Post 16:** Although this age group are already given the lowest priority in terms of a place on a school bus, there is an expectation amongst many parents that places will be provided even where there are suitable public transport alternatives. As a result of this change, young people in Years 12 and 13 will be expected to use public transport where possible but arrangements will be made for those who do not have a suitable public transport alternative. Places will also be made available where buses are undersubscribed and there is no opportunity to replace the service with a smaller vehicle at a lower cost.
- 2.21. A full Equality Impact Assessment has been undertaken of the guidelines amended as above (Appendix 2) which are recommended to the Transport Committee for adoption.
- 2.22. The application of discretion as discussed in the preceding paragraphs will in some cases require that a phased approach is taken to the implementation of the Guidelines to avoid any short term disruption or hardship and to allow time to plan a different network of services. This is in line with the recommendations of the Overview and Scrutiny Committee.

Application of Current Guidelines

- 2.23. It should be noted that alongside the implementation of the revised guidelines, the Transport Services team are reviewing the operation of existing services against the value for money criteria in the current guidelines. Many of the Mybus primary school services that the Combined Authority organises as are not meeting the criteria mostly due to low passenger numbers. Changes will be made to these services in September. This follows a formal engagement process involving schools, parents and other interested parties, which was undertaken in April 2019. Some services will be withdrawn whereas others continue with revised fare and/or funding arrangements.

3. Financial Implications

- 3.1. The adoption of the revised guidelines will assist in reducing spend in line with the reduced budgets for the provision of bus services. It is not possible at this stage to estimate the annual savings until such time as the service planning using the new guidelines has been completed.

4. Legal Implications

- 4.1 An Equality Impact Assessment of the revised guidelines has been undertaken and is available to be reviewed.

5. Staffing Implications

- 5.1 There are no staffing implications directly arising from this report.

6. External Consultees

- 6.1 The Combined Authority has undertaken a formal engagement process and has obtained feedback from schools, parents, academy trusts, Members of Parliament, local councillors and other interested parties.

7. Recommendations

- 7.1 That the Transport Committee approves the adoption of the revised School Bus Guidelines attached as Appendix 2.
- 7.2 That implementation of the revised School Bus Guidelines be carried out as described in this report.

8. Background Documents

Full list of comments received from engagement process.

9. Appendices

Appendix 1 – Current School Bus Guidelines

Appendix 2 – Proposed School Bus Guidelines

Appendix 3 – Summary of Engagement Process

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Policy Guidelines for Bus Services to Schools – September 2014

Requests for New Services to Schools

West Yorkshire Combined Authority will consider the following in appraising requests to West Yorkshire Combined Authority to fund new services to schools for students not entitled to transport by statute.

- **A new service will not be provided to a secondary school if students can reasonably be expected to make the journey by walking or using regular public transport.**
- **A test of “reasonableness”** will be applied to the journey
 - Walking distance 1.5 miles by a safe walking route
 - Bus Journey 1hr 15 minutes in total, including interchange
 - Maximum of 1 interchange using a safe interchange point
 - Home and bus stop are within 600m (10 min walk)
 - Pupil arrives no earlier than 30 minutes before registration
 - Pupil departs no later than 20 minutes after school finish
 - Bus Journey does not begin before 0700
- West Yorkshire Combined Authority will not fund a new service where the statutory responsibility to provide transport lies with the LEA of another body. West Yorkshire Combined Authority will however assist in organising such services on behalf of the statutory body.
- West Yorkshire Combined Authority will not fund a new service arising due to a reorganisation of school sites or opening times. West Yorkshire Combined Authority will however assist in organising such services where funding is available from the LEA, school, parents or another body.

Guidelines for Appraisal of Existing School Services Funded by West Yorkshire Combined Authority

Where West Yorkshire Combined Authority is funding a school service carrying 75% or more students who are not entitled to transport by statute, the service will be appraised under the following tests:-

- **Students currently using the service cannot reasonably be expected to make the journey by walking or using regular public transport** - the above test of reasonableness will be applied.
- **There are enough students using the service to justify its continued provision** - alternative arrangements will be made where buses are usually operating at less than 25% occupancy during winter and spring terms.
- **The service is cost effective** - lower cost alternatives will be explored when the cost per mile exceeds £3.

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GUIDELINES FOR THE PROVISION OF SCHOOL SERVICES

Effective From September 2019

As local authorities responsible for education in their areas, the five councils in West Yorkshire have powers and responsibilities under the Education Acts to provide transport for pupils.

As Local Transport Authority for West Yorkshire, the Combined Authority uses its powers under the Transport Acts to provide socially necessary bus services. The Combined Authority provide bus services which link communities with local schools where the journey could not be made by walking, cycling or established public transport links. The Combined Authority assists the local Councils providing a co-ordinated school transport service.

The following guidelines set out the principles and standards that the Combined Authority will use in providing school buses under its Transport Act powers.

Services for Secondary Schools

A service may be provided or an existing service continued to a secondary school where children are in Years 7 to 11, are attending a school within West Yorkshire, live within a four mile radius of the school (*see Note 1*), the public transport network is considered unsuitable and the school is not within a reasonable walking distance of their home address. This will be determined by reference to the following criteria:

- The walking distance is greater than 2.4 km (1.5 miles / 30 minute walk) by a safe walking route (In urban areas this should be paved, lit with suitable pedestrian crossing facilities – addresses in rural and semi-rural areas to be considered on a case by case basis with reference to Road Safety GB guidelines as necessary);
- The bus journey is greater than 1 hour 15 minutes in total (including changing buses);
- More than one interchange is required;
- Interchange is not at a suitable location (bus stations / town centres and other populated areas are considered suitable);
- In urban areas, the distance between the home address and the bus stop/rail station is greater than 600m (up to 10 minute walk) – addresses in semi-rural and rural areas to be considered on a case by case basis;
- The distance between school and the bus stop/rail station is greater than 600m (up to 10 minute walk);
- The pupil would arrive at the school gate earlier than 30 minutes before registration;
- The pupil would depart from the school gate more than 30 minutes after school closes;

- The boarding point outside of the school is unsafe taking into account the number of children waiting for public transport (as evidenced by a risk assessment).

Note 1 – Discretion will be applied if the school is located in a rural or a semi-rural area and/or if the school serves rural or semi-rural communities.

A value for money criteria will also be applied:

- Services will be considered for withdrawal or lower cost alternatives put in place where the average subsidy per passenger trip exceeds £1.50, based on data for a minimum of 40 days operation (typically, the number of passengers required to achieve this would be:

Double deck (75 to 90 capacity) 50+
 Single deck (25 to 57 capacity) 40+
 Midibus (16 to 24 capacity) 20+
 Minibus (up to 16 capacity) 10+

New Services

The Combined Authority will not normally fund a new service:

- Where the statutory responsibility to provide transport lies with the council or another body. The Combined Authority will however assist in organising such services where funding is available from the local council or another body, subject to payment of a management fee.
- Where this is due to a reorganisation of school sites, changes in opening times or where school holidays differ from the local council's adopted holidays. The Combined Authority will however assist in organising such services where funding is available from the council or another body, subject to payment of a management fee.
- Where this is due to the withdrawal of funding by the local council or another body. The Combined Authority will however assist in organising such services where funding is available from the local council or another body, subject to payment of a management fee.
- Where parents have chosen a school which does not already have a school bus service or public transport links from the area in which they live. The Combined Authority will however assist in organising such services where funding is available from the local council or another body, subject to payment of a management fee.
- Where the school is a fee paying school or the school's admissions criteria is based on academic selection.
- Where the subsidy would exceed £1.50 per passenger trip.

- Where this would operate to a school outside of West Yorkshire.

Primary School Services

The Combined Authority provides a limited number of primary school services. These services were introduced to encourage people to travel by bus instead of car. A small number are co-funded by the local councils because they were first introduced under previous council policy. It is not intended to introduce any new services of this type in future without external funding.

Local council funded services will be withdrawn if the funding is no longer available. Other services will be considered for withdrawal or a lower cost alternatives implemented where the subsidy per passenger trip exceeds £1.50, based on data for a minimum of 40 days operation.

Post-16 students

Transport will not normally be provided for young people in Years 12 and 13 even if journeys to and from school meet the criteria for service provision or retention as outlined for children in Years 7 to 11.

Post 16 student curriculum timetables are frequently inconsistent with home-to-school bus timetables meaning that the Combined Authority is meeting the cost of retaining 'empty seats' on many services.

Pupil allocation Criteria

Where the number of applications for a place on a school bus exceeds the number of available places, the following criteria will apply:

Local council funded services (assuming application or renewal received by published closing date) – See also Note 2

1. Children eligible for free travel or assistance with travel expenses under local council policy.
2. Children with additional needs/requirements who may not be eligible for assistance (evidence will be required).
3. Children who are not eligible for assistance but for whom there is no 'reasonable' (as defined in the Combined Authority's guidelines) public transport alternative.
4. Children living along the line of the route (within 1km) by age (exact date of birth). Priority will be given to the youngest children.
5. Other children by age (exact date of birth). Priority will be given to the youngest children.
6. Late applications by the above criteria.

Note 2 – These are subject to local council policy changes. In some cases, school specific or service specific guidelines may apply, which may differ from the general guidelines outlined above.

Combined Authority-funded services (assuming application or renewal received by published closing date)

1. Children with additional needs/requirements (evidence will be required).
2. Children for whom there is no 'reasonable' (as defined in the Combined Authority's guidelines) public transport alternative.
3. Children living along the line of the route (within 1km) by age (exact date of birth). Priority will be given to the youngest children.
4. Other children by age (exact date of birth). Priority will be given to the youngest children.
5. Late applications by the above criteria.

Primary (assuming application or renewal received by published closing date)

1. Children eligible for free travel or assistance with travel expenses under local council policy (if service funded by local council).
2. Existing users.
3. New Applications.
4. Late applications/renewals by the above criteria.

Fares

Flat fares (same fare regardless of distance travelled) will be charged on all contracted services that are included in the West Yorkshire Concessionary Travel Scheme. The fare will be based on comparable fares charged on the commercial public transport network.

Seatbelts

Seatbelts will be provided on all contracted primary school services. Seatbelts will not be a requirement on contracted secondary school services. This is to ensure consistency with the public transport network.

Passenger Assistants

Passenger Assistants will be provided on all primary school services that regularly carry 30 or more passengers. (This is currently under review).

Standing passengers

Standing passengers are permitted on buses used on local authority contracted secondary school services up to the maximum specified on the vehicle. This is to ensure consistency with the public transport network.

Commercial services

Combined Authority-funded services will be considered for withdrawal where operators register or make available competing commercial services. This includes services that fall outside of the West Yorkshire Concessionary Travel Scheme and, therefore, might charge higher fares or offer alternative payment methods.

Subject to agreement with the relevant the local council, this may include council funded services.

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Appendix 3

Travel To School Guidelines- Engagement

The following summarises the feedback from the engagement surveys undertaken on the proposed Travel to School Guidelines.

In addition to the public engagement, a full Equality Impact Assessment has been undertaken and is available for inspection.

In which district do you / your child attend school?

Bradford	41
Calderdale	241
Kirklees	42
Leeds	124
Wakefield	88
Total	536

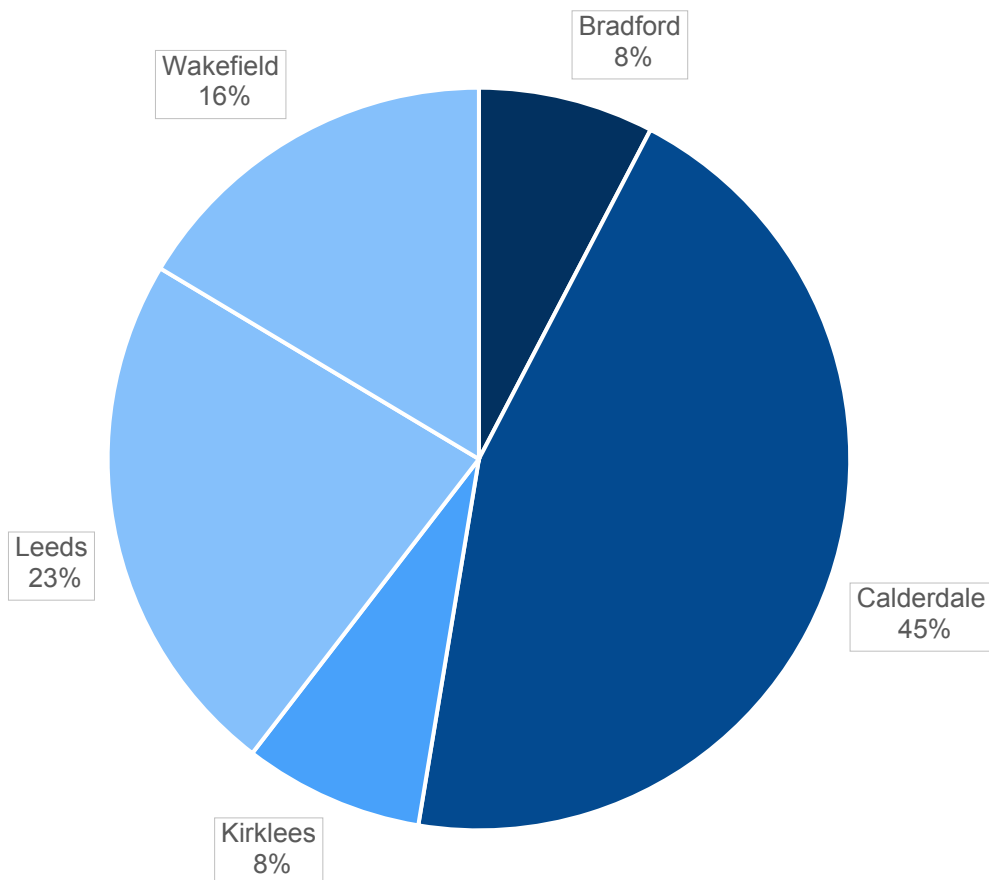


Fig. A. Chart showing the number of respondents in each district. $n = 536$.

Which school do you / does your child attend?

Abbey Grange Academy	20	Rodillian Academy	44
All Saints R C School	4	Queensbury School	1
Beckfoot Thornton Academy	5	Ryburn Valley High	12
Bingley Grammar School	2	Salendine Nook High	2
Brighouse High School	27	St Bede's and St Joseph's CC	9
Brigshaw High School	1	St John Fisher Dewsbury	7
Brooksbank College	4	St Wilfrid's RC High School	69
Calder High School	9	Titus Salt School	7
Cardinal Heenan	20	Todmorden High School	3
Carleton High School	2	Trinity Academy	5
Cockburn College	1	Trinity Academy Sowerby Bridge	5
Coop Academy Priesthorpe	1	Woodkirk Academy	4
Crawshaw Academy Trust	1	Other	8
Crofton Academy	3		
Crossley Heath	18		
Garforth Academy	7		
King James School	18		
Kirkburton Middle School	8		
Leeds City Academy	1		
Lightcliffe Academy	9		
Menston St Mary's RC	16		
Mount St Mary's	3		
North Halifax Grammar	138		
Outwood Academy Hemsworth	1		
Outwood Grange School	1		
Park Lane Academy	8		
Parkside Secondary School	11		
Prince Henry's Grammar	9		
Royds School	5		

How do you / does your child (ren) currently travel to school? (Please tick all that are used regularly)

School bus	495
Public service bus	43
Walking	12
Car	51
Bicycle	1
Other	2
Total	604

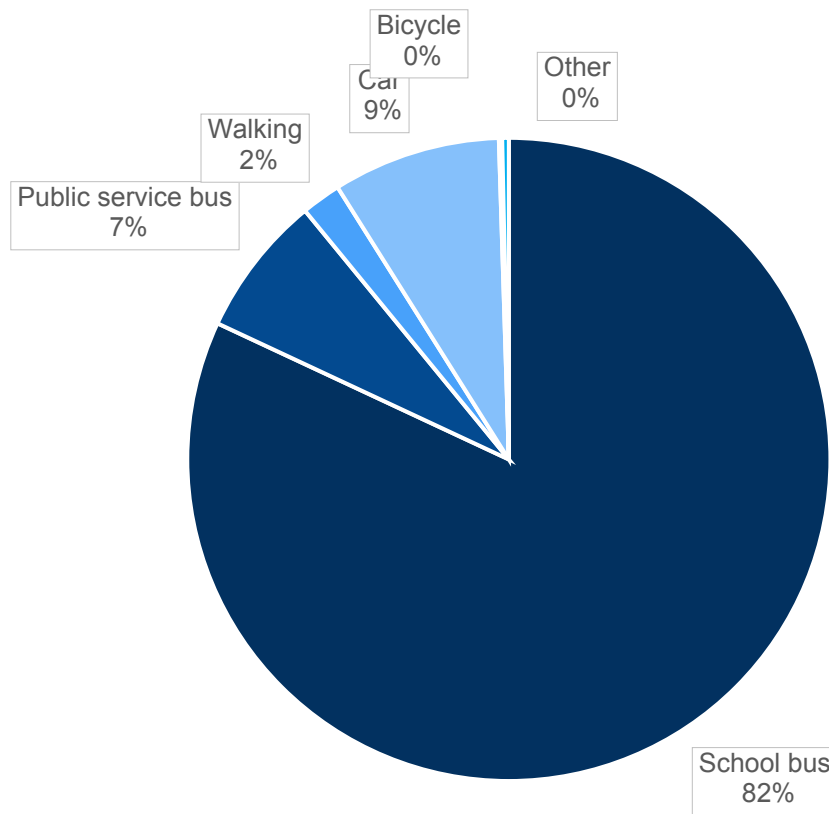


Fig. B. Chart showing how respondents currently travel to school. $n = 604$.

What school year group are you / is your child in? (if you are completing this survey on behalf of multiple children please select all that apply)

Primary School	46
Year 7	187
Year 8	131
Year 9	119
Year 10	87
Year 11	60
Year 12	27
Year 13	9
Total	666

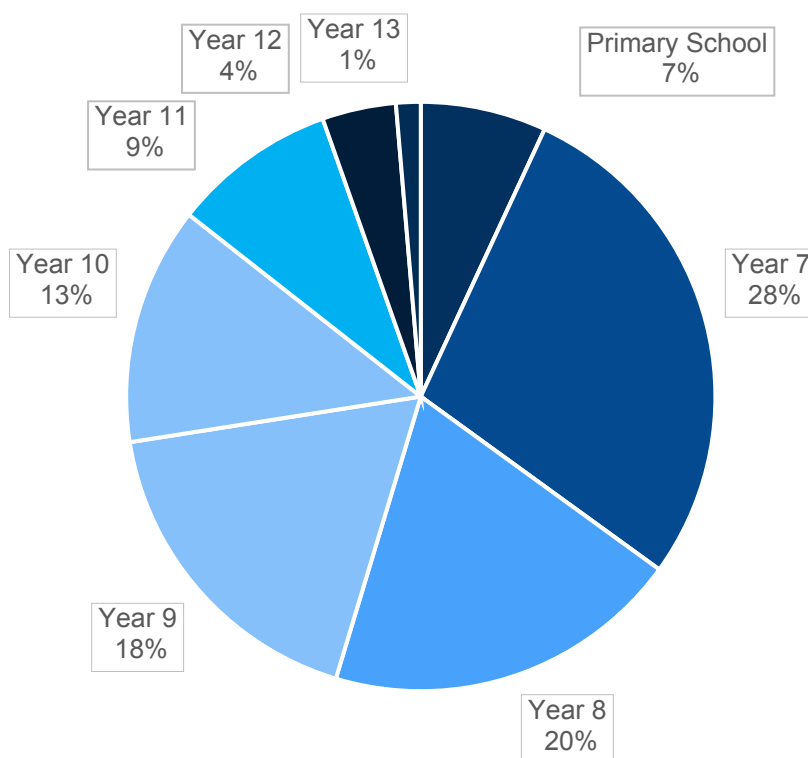


Fig. C. Chart showing the current academic school year of respondents child/children. $n = 666$.

To what extent do you agree or disagree with each of the following proposed changes to the guidelines:

Post-16 – Subsidised school bus services will not normally be provided for young people in the 16-18 age group. In practice, many students in this age group do not travel at fixed times to and from school, and are usually confident public transport users.

Strongly agree	48
Agree	155
Neutral	113
Disagree	109
Strongly disagree	110
Total	535

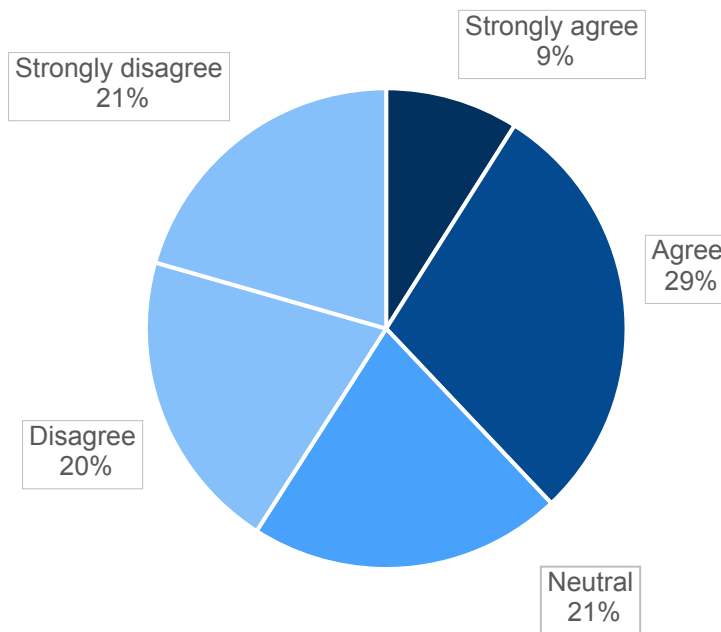


Fig. D. Chart showing the extent respondent agrees/disagrees with proposed change to Post 16 provision. *n* = 535.

Comments

Responses from surveys fit into the following categories.

1. Post 16 do not have a fixed school day	47
2. Post 16 are confident public transport users	55
3. Post 16 do have a fixed school day	84
4. Public transport journey inconvenient/ unreliable/takes too long	90
5. Subsidised school services should be provided to all school pupils	45
6. Perceived safety concerns accessing and using public transport	18

Distance from school - Subsidised school bus services will not normally be provided where pupils are attending a school that is more than four miles (6.5 km) from their home address. It will be assumed in these cases that this is a matter of parental preference. It is expected that pupils living outside this area would be provided transport on a commercial basis or would have longer public transport journeys. Discretion will be applied where schools are located in rural or semi-rural areas or where services serve rural or semi-rural communities.

Strongly agree	19
Agree	67
Neutral	86
Disagree	105
Strongly disagree	252
Total	529

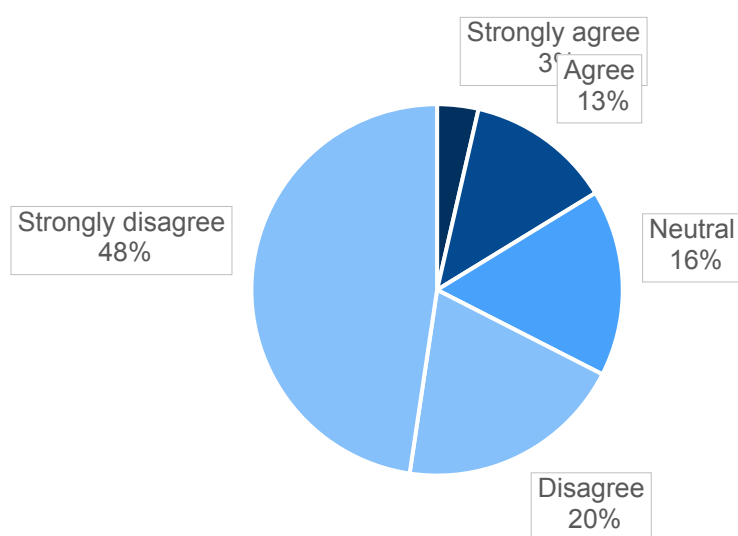


Fig. E. Chart showing the extent respondent agrees/disagrees with proposed change to provision for pupils living more than 6.5km from school. *n* = 529.

Comments

Responses from surveys fit into the following categories.

1. Agree - if it is parental preference to attend a school over this distance	41
2. Subsidised school services should be provided to all school pupils	55
3. Public transport journey inconvenient/unreliable/takes too long	53
4. Unfair to change provision for existing pupils	56
5. Perceived safety concerns accessing and using public transport	19
6. School allocated is not always school selected	22
7. Contradicts Calderdale admission policy	24
8. Discriminates against selective schools	39
9. Discriminates against faith schools	44

Requests to serve new areas - Subsidised school bus services will not normally be introduced where currently no public transport link exists. As information on school services is publicly available, it will be assumed that parents have chosen a school in the knowledge that there is no direct public transport link and already have alternative transport arrangements in place.

Strongly agree	27
Agree	129
Neutral	157
Disagree	89
Strongly disagree	127
Total	529

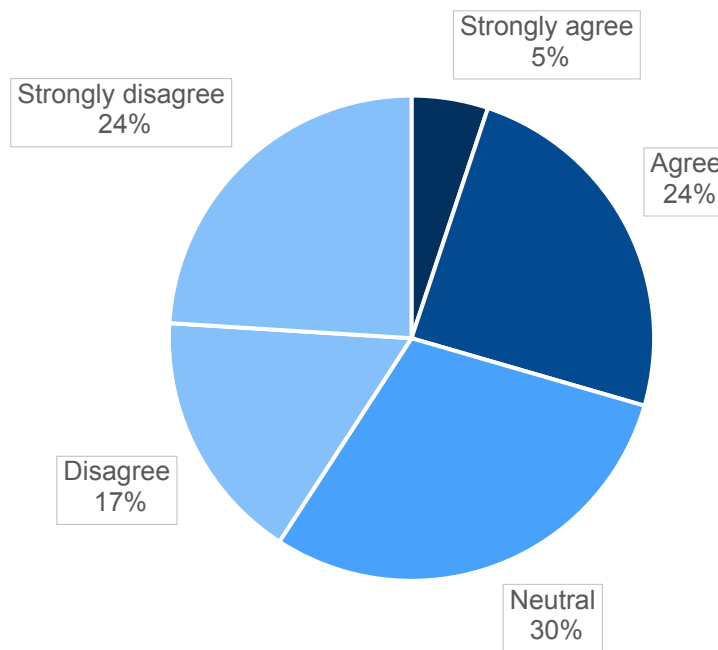


Fig. F. Chart showing the extent respondent agrees/disagrees with proposed change guidelines to provide new services. *n* = 529.

Comments

Responses from surveys fit into the following categories.

1. Agree - school was chosen with the knowledge there was no school bus service.	60
2. Subsidised school services should be provided to all school pupils	35
3. Perceived safety concerns on accessing and using public transport.	5
4. School allocated is not always school selected.	18
5. Public transport journey inconvenient/unreliable/takes too long	11

Walking or cycling to school – Subsidised school bus services will not normally be provided for pupils who live less than 1.5 miles (2.4km) (30 minute walk) from their school. Pupils who live within this distance may be expected to walk or cycle to and from school.

Strongly agree	46
Agree	142
Neutral	105
Disagree	88
Strongly disagree	148
Total	529

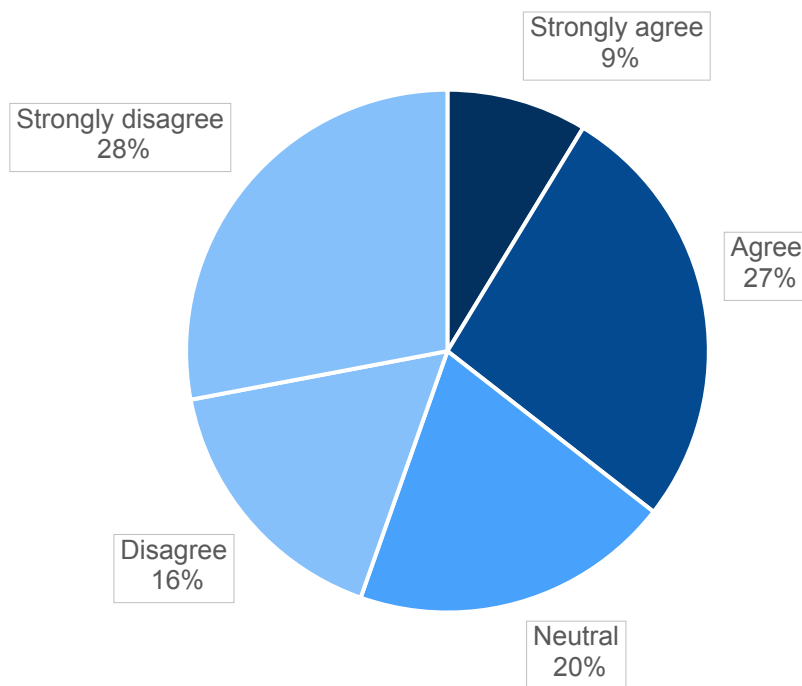


Fig. G. Chart showing the extent respondent agrees/disagrees with proposed change guidelines for pupils living less than 1.5 miles from their school. *n* = 529.

Comments

Responses from surveys fit into the following categories.

1. 1.5 miles (2.4km) (30 min walk) is an acceptable distance	91
2. 1.5 miles (2.4km) (30 min walk) is too far to walk	33
3. Young people should not be expected to walk/cycle in the dark/bad weather	74
4. Road safety concerns. Infrastructure does not support safe walking/cycling	121
5. Personal safety concerns	48

Commercial school bus services – Subsidised school bus services may be withdrawn where commercial bus operators are willing to provide a service on the basis that parents meet the whole cost of the service (typically £500-£700 per child per year). It is expected that this would only apply to current services that fall outside of the new criteria.

Strongly agree	16
Agree	45
Neutral	102
Disagree	118
Strongly disagree	248
Total	529

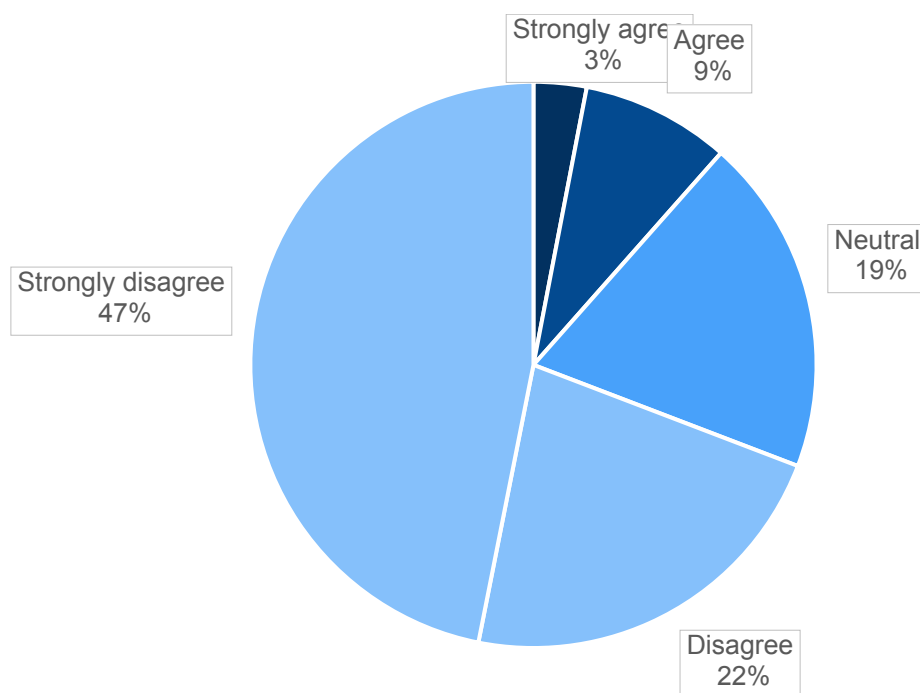


Fig. H. Chart showing the extent respondent agrees/disagrees with proposed change to guidelines if commercial operators are willing to provide a service for those that fall outside of the new criteria. n = 529.

Comments

Responses from surveys fit into the following categories.

1. Cost – suggested amount too expensive	157
2. Would be prepared to pay to guarantee a school bus service	51
3. Cost is prohibitive for low income families	44
4. Concerned about uncertainty of commercial operator (service withdrawal/cost increases)	24
5. Subsidised school services should be provided to all school pupils	48
6. Unfair to change provision for existing pupils	14

Selective schools – Subsidised school bus services will not normally be provided where the school admissions policy is based on academic selection. It is expected that these would be replaced by commercial services as described above.

Strongly agree	45
Agree	67
Neutral	148
Disagree	88
Strongly disagree	182
Total	530

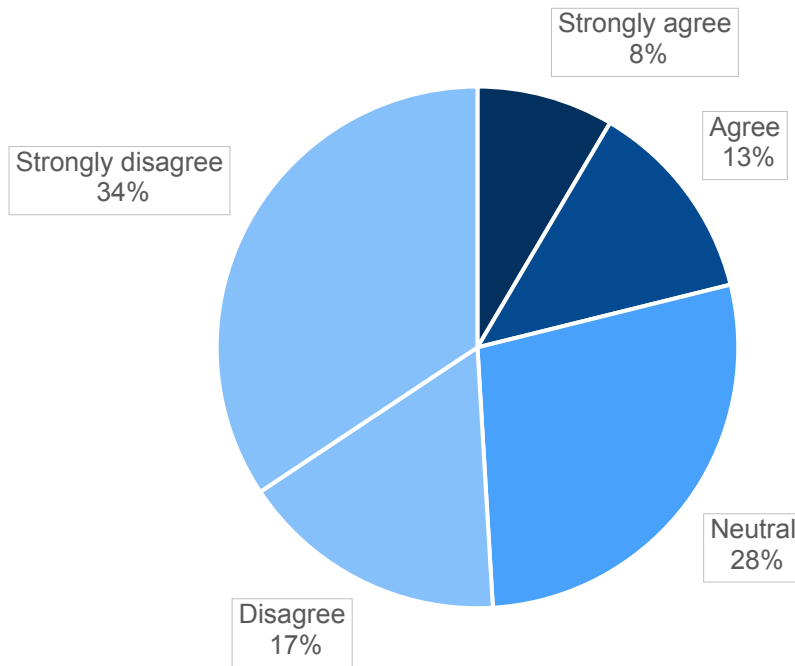


Fig. 1. Chart showing the extent respondent agrees/disagrees with proposed change to guidelines regarding school services to selective schools. n = 530.

Comments

Responses from surveys fit into the following categories.

1. Agree – parents should meet cost of service	36
2. Discriminates against selective school pupils	116
3. Discriminates against low income families	47
4. Unfair to change provision for existing pupils	15
5. Contradicts Calderdale admissions policy	30

What is your / your child's ethnic origin?

Asian / Asian British	28
Black / Black British	4
Mixed / Multiple ethnic groups	14
White British	435
White other	12
Prefer not say	25
Other	2
Total	520

Do you / your child identify as:

Male	205
Female	340
Other	2
Prefer not to say	27
Total	574

Are your / your child's day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months?

No	410
Yes, a little	48
Yes, a lot	34
Prefer not to say	28
Total	520

What is your / your child's religion or belief?

Christian	274
Hindu	6
Muslim	16
Sikh	5
No religion	176
Other	36
Total	513

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Report to: Transport Committee

Date: 5 July 2019

Subject: **West Yorkshire Bus Alliance**

Director: Dave Pearson, Director of Transport Services

Author(s): Helen Ellerton

Is this a key decision?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	

1. Purpose of this report

- 1.1 To provide an update on the West Yorkshire Bus Alliance, obtain approval for the work stream delivery plans and to sign the Voluntary Partnership Agreement.
- 1.2 To set out the next steps to enable delivery of the Alliance.

2. Information

Background

- 2.1 The bus is the biggest public transport mover of people in West Yorkshire and has a critical role in our transport network: it is essential for providing access to jobs and training. However, in line with national trends, we have declining patronage in 2017/18, 147.8 million journeys were made on local buses in West Yorkshire, which represents a decrease of 21 million journeys (12.6%) since 2009/10. This disconnect between the central role of the bus and the declining patronage means there is a real need to understand and deliver interventions that could provide a different and more attractive offer to the customer.

2.2 The key aim of the Alliance is to deliver the objectives of the West Yorkshire Bus Strategy. The overarching objectives are to contribute towards:

- Enabling economic growth in West Yorkshire by improving connectivity to areas of economic opportunity.
- Realising environmental aspirations, including significantly reducing local emissions.
- Supporting local communities by improving access to health services, education, employment, leisure and retail destinations

2.3 The Alliance will set and monitor against the following measures of success:

- Increased bus patronage - working towards increasing bus patronage by 25% across West Yorkshire by 25% and by doubling patronage in Leeds both against a benchmark of 2017.
- Reliable Service Delivery – using aggregated performance data on schedule adherence, average passenger waiting time (for frequent services) and journey times.
- Customer Satisfaction – for which the Transport Focus Bus Passenger Survey is the key indicator offering comparisons across the country

West Yorkshire Bus Alliance Work Plans

2.4 On the 11 January 2019 Transport Committee endorsed the commitments proposed for delivery through the West Yorkshire Bus Alliance. The table below provides a summary of the themes, work streams and commitments.

Theme	Work Stream	Commitments
Customers at the Heart	Network Legibility	A bus network clearly identifiable to users and non-users
	Ticketing and Retail	Account based ticketing
	Ticketing and Affordability	Simple fares structure and fare offers for young people
	Travel Information	Live journey planning information, real time and disruption collaboration
	Customer Service	Consistent customer service offer, improved on board bus customer facilities
	Communication and Engagement	Promotional engagement to encourage behavioural change
Keeping Buses Moving	Highway Infrastructure	Highway Improvement Programme to reduce journey times, congestion relief programme, improved bus waiting infrastructure
	Service Provision	Extended operating hours, Review of the bus network structure, improved network security, better emergency planning, major highway events planning and resilience

Sustainable Bus Network	Air Quality	Delivery of a clean bus technology programme
	Economy of the Bus Network	Better data availability, review of the economy of the bus network

2.5 West Yorkshire Combined Authority, alongside the West Yorkshire District Councils and bus operators have worked together to develop a delivery plan for each work stream. The delivery plans have been developed using a number of forums:

- Identifying co-leads for each work stream, this includes a WYCA lead and an Operator Lead.
- An Officer and Operator Away Day was held to discuss each work stream in detail and ensure the deliverables covered the broadest requirement.
- A workshop event was held involving senior/ middle managers from bus companies, the Combined Authority and Councils (“The Big Meet Up”) – a challenge session was undertaken at the Big Meet Up to allow for further discussion and review of the content of the delivery plans.

2.6 The delivery plans identify the following:

- Description of the output for the commitment.
- How the commitment will be delivered.
- Funding - identification of source of funding or requirement for funding.
- Outputs that can be delivered early.
- Dependencies
- Performance management -how the output will be measured.

2.7 Appendix 1 contains the current delivery plans which will be kept under review by the Steering Group.

2.8 The Alliance intends to deliver a number of customer focused early priorities, including:

1. A fare deal for young people –identifying a maximum fare and promoting the opportunities for young people to save money on bus fare
2. A driver training programme to deliver further training to improve driver interaction with customers.
3. A proposal to make the bus network more legible and easier to use –the accompanying paper on the Committee’s agenda regarding Core Bus Network Presentation details early proposals in this regard.
4. Shared ticketing agreement which will allow customers to use services offered by different bus operators during times of disruption, such as bad weather, broken down vehicles and other major incidents.

Voluntary Partnership Agreement

2.9 At its meeting on 23 April, the Combined Authority endorsed the steps taken to develop the Bus Alliance and delegated the Transport Committee to oversee the development and signature of a formal agreement. The commitments

approved by Transport Committee together with the delivery plan will be incorporated into a formal West Yorkshire wide over-arching Voluntary Partnership Agreement. Appendix 2 sets out the key Heads of Terms included as part of the Voluntary Partnership Agreement

2.10 It is proposed that the Voluntary Partnership Agreement is signed by the following parties:

- West Yorkshire Combined Authority, on behalf of the West Yorkshire districts
- Arriva Yorkshire
- First West Yorkshire
- Transdev Blazefield
- Yorkshire Tiger
- Association of Bus Operator West Yorkshire (ABOWY), representing most small/ medium sized bus operators. Engagement is currently underway with the smaller bus operators to either encourage them to become members of ABOWY or sign up in their own right.

2.11 The Voluntary Partnership Agreement will include the over-arching agreements that will be used to structure the Alliance. This includes:

- Governance
- The Work Streams and how they will be monitored
- Funding and constraints
- Data sharing, availability and data protection
- Intellectual property rights
- Terms of termination
- Confidentiality
- Competition and procurement law
- Amendments

2.12 Setting the core principles will provide flexibility should new major highway infrastructure that is likely to reduce journey times for buses be developed and delivered over the course of the Alliance.

2.13 It should be noted that there is no compulsion on bus operators to sign up to the Voluntary Partnership Agreement. The following link summarises the Department for Transport Frequently Asked Questions on developing Voluntary Partnership Agreements.

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/664318/bus-services-act-2017-new-powers-and-opportunities.pdf

Governance and Reporting

2.14 The Transport Committee will oversee the Alliance. The Chair of the Transport Committee will lead the Steering Group of the West Yorkshire Bus Alliance comprising senior managers of the bus operators, officers of the Combined

Authority and an officer of one of the West Yorkshire districts. Transport Focus will represent passenger interests and there will be close liaison with local authority highway teams. It is planned to share learning with the Bus Partnership in York.

2.15 In addition to the West Yorkshire Bus Alliance Steering Group, it is proposed that an officer group for each District area be established to facilitate collaboration between local authority highway teams, Combined Authority officers and bus operators. These groups will seek to identify opportunities, operational processes and highway schemes which are aimed at speeding up bus journeys and improving reliability.

2.16 The West Yorkshire Ticketing Company Ltd (WYTCL) is the Joint Venture Company co-owned by the Combined Authority and bus and rail operators to manage the MCard multi-modal smart ticketing scheme. WYTCL will play a key role in delivering the ticketing and information commitments of the Alliance.

Next Steps

2.17 On approval of the Delivery Plans and to progress with signing the Voluntary Partnership Agreement the Combined Authority will identify a resource to manage the Alliance and ensure the Key Performance Indicators can be achieved.

3. Financial Implications

3.1 Costs involved in the development of a Bus Alliance will be met from approved budgets. Where costs are shared with bus operators these will be recovered through the mechanisms in place with West Yorkshire Ticketing Company Ltd.

4. Legal Implications

4.1 This report proposes the development and signature of a Voluntary Partnership Agreement between the Combined Authority and bus operators.

5. Staffing Implications

5.1 The Combined Authority will delivery the management of the Alliance within existing resource. Specific projects may require a dedicated staff resource

6. External Consultees

6.1 The work to develop the West Yorkshire Bus Alliance and associated delivery plans has involved engagement with bus operators, district highways officers and Transport Focus. It seeks to address the feedback obtained from extensive public consultation prior to the Combined Authority's adoption of its Bus Strategy in 2017.

7. Recommendations

- 7.1 That the Committee endorses the establishment of the West Yorkshire Bus Alliance as a voluntary partnership and the signature of the Voluntary Partnership Agreement by the Chair of the Transport Committee.
- 7.2 That the Committee endorses the West Yorkshire Bus Alliance Delivery Plans as set out in Appendix 1 of this report

8. Background Documents

None.

9. Appendices

Appendix 1 – Work stream Delivery Plans

Appendix 2 – Voluntary Partnership Agreement key Heads of Terms

Work stream: Network Legibility

Commitment: Developing a Clear Network to Navigate

Co-leads: Mike Nolan and Ben Mansfield

Output	Description	Outcome	How It Will Be Delivered?	Dependencies	Funding	Early Deliverable?	Performance Management
Customer insight	Customer research/testing session to understand customer requirements in the presentation of the network – especially with non-users/young people.	Customer insight into the development and delivery of the network legibility plan. Improved customer offered driven by them.	Delivered via the Network visualisation tender	Transport Focus, WYCA Tracker survey and the feedback from young people via Leeds Voice & Influence team to be included within the analysis of customer requirements.	Transport Focus & Tracker survey funded via revenue budget. Network legibility research funded within LPTIP Network legibility workstream.	A customer workshop to test network legibility concepts	WYCA Tracker Survey & Transport Focus
Co-ordinated infrastructure that presents a single network of services shelters, flags, bus stops and buses	Develop a creative solution to identify and promote the key route network and associated delivery plan to implement/install.	Improved customer offer. Clear network to navigate.	Delivered via the Network visualisation tender	WYCA's on street shelter refurb/maintenance programme LPTIP city centre, corridor improvement and gateways programmes Bus waiting infrastructure workstream Bus Information Strategy	LPTIP Network legibility workstream.	No	WYCA Tracker Survey & Transport Focus
Clear network map and co-ordinated/consistent timetable information provision	Create a mapping solution that presents a single network of frequent services and corridor specific maps and timetable information that provide customers with an enhanced level of information that can be rolled out across West Yorkshire.	Improved customer offer. Presenting a comprehensive easy-to-use network. New approach to presentation/provision of printed timetable information	Delivered via the Network visualisation tender	Bus waiting infrastructure workstream LPTIP City centre/Corridor/gateway improvement programme Bus Information Strategy	LPTIP Network legibility workstream.	A creative concept with agreed and delivered as per Transdev's project plan.	WYCA Tracker Survey & Transport Focus
Defined key route network offer.	Develop the message behind the core route network to define what the customer can expect. I.e. Frequency, USB, Wi-Fi etc.	Clear customer proposition.	Bus Delivery Board to agree key messages/key principles of the core route network.	Communications & engagement workstream Bus Network structure	No funding required	Steering Group to agree the customer offer on key routes	WYCA Tracker Survey & Transport Focus
Information at stops and interchanges	Revised guidelines for the provision of information at stops appropriate to the level of service provided. Some stops to just display generic service information. Develop design that compliments wider infrastructure branding	Improved information/customer offer.	Delivered via the Network visualisation tender	Bus waiting infrastructure workstream	LPTIP Network legibility workstream	No	WYCA Tracker Survey & Transport Focus
Clearly identify express/longer routes and services	Develop an approach to identify fast and slower services via destination blinds that could be standardised across all operators.	Improved information/customer offer	Delivered via the Network visualisation tender	Bus Network Structure workstream	LPTIP Network legibility workstream	Steering Group to agree how this is differentiated	WYCA Tracker Survey & Transport Focus

Awareness of the key route network	Develop promotional plan to promote 'how to' navigate the network	Improved awareness/encourage patronage.	Delivered via the Network visualisation tender	Communications & Engagement	LPTIP Network legibility workstream	No	Media monitoring Measurement of before/after awareness levels WYCA Tracker Survey & Transport Focus
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Workstream: Ticketing and Retail

Commitment: Increasing Off-Bus Sales

Co-leads: Mike Nolan and Martin Hirst

Output	Description	Outcome	How It Will Be Delivered?	Dependencies	Funding	Early Deliverable	Performance Management
Clear promotion and discount for pre-purchased products, working with WYTCL and bus operators on presentation of offers both MCard and operator own solutions	Deliver MCard Marketing plan to promote awareness and sales of MCard products – particularly the multi-operator/modal features of the product providing access to increased frequency.	Increased sales and journeys.	WYTCL workplan	Simple fare structure Fare offers for young people	WYTCL, operators to fund promotion of own products	Deliver MCard Marketing plan	Increase MCard sales by 5%
An iOS solution for retailing of multi-modal products	Deliver an iOS app to retail MCard products and passes.	Improved customer offer providing a convenient retail channel to purchase products.	WYTCL workplan	Digital Payment Strategy	SCIP	Medium term	% of uptake WYCA Tracker Survey & Transport Focus
Full range of multi-modal products available via smart media	Make Myday product available on smart media.	Full range of young people's products available on smart	WYTCL workplan	Digital Payment Strategy	WYTCL	Make Myday product available on smart media.	% of uptake WYCA Tracker Survey & Transport Focus
A solution for those on low incomes or without bank accounts to enjoy the benefits of pre-purchased and seasonal tickets	Explore the possibility of joining up with credit unions to offer credit facilities that will provide access to discounted seasonal products for those without bank accounts.	A solution for the 'unbanked'.	WYTCL workplan	TBC	Funding requirement to be understood	No	% of uptake WYCA Tracker Survey & Transport Focus
Transformation of travel Centres	Transform the service offered at Travel Centres that facilitates the shift to self-serve options in line with the model of High Street banks.	Improved customer offer.	WYCA & WYTCL	Bus Information Strategy	WYCA via Transport block	No	WYCA Tracker Survey & Transport Focus
MCard products available on operator apps	Explore the possibility of making MCard products available via operator apps.	Ease of purchase for customers who generally use one operator but may need to use multiple operators/modes to make other types of journeys – avoiding the need for multiple apps.	WYTCL workplan	Digital payment strategy	WYTCL	Identify options for making MCard products available via operator apps.	Increase MCard sales by 5% WYCA Tracker Survey & Transport Focus
Operator products on MCard app	Explore the possibility of retailing operator specific products on MCard app	Ease of purchase for customers who generally use MCard but may need to use single operators/modes to make other types of journeys – avoiding the need for multiple apps.	WYTCL workplan	Digital Payment Strategy	WYTCL	No	% of uptake WYCA Tracker Survey & Transport Focus
Fare capping	Monitor developments of the Account Based Back Office Ticketing (ABBOT) that TfN is developing and	Customers receive the best walk-up fare capped at the value appropriate to the journeys made.	TfN – phase 3 of IST programme	Simple fare structure	TfN	No	WYCA Tracker Survey & Transport Focus

Output	Description	Outcome	How It Will Be Delivered?	Dependencies	Funding	Early Deliverable	Performance Management
	determine the product range that should be included within the offer.			Fare offers for young people WYTCL workplan			
More on-street top-up options	Explore opportunities to introduce opportunities for ticket purchase/top-up at hubs and interchanges.	Improved customer offer – increased provision of the retail network.	LPTIP City centre improvement plan, hubs/gateways and totems workstream.	Simple fare structure Fare offers for young people	LPTIP for Leeds district – monitor success for wider scale roll-out	No	WYCA Tracker Survey & Transport Focus

Workstream: Ticketing and Affordability

Commitment: Simple Fare Structure

Co-leads: Kate Gifford and Martin Hirst

Output	Description	Outcome	How It Will Be Delivered?	Dependencies	Funding	Early Deliverable	Performance Management
A design for a simple fares structure	Development of a simplified structure for fare calculation – this may be zonal or distance based	Develop a set of principles to determine fares – e.g. short, medium and long hop journeys. Consider flat fares on mobile tickets Ensure changes work towards TfN future changes (Abbot)	Bus Alliance members to reach agreement on the principles for a fare structure and also the most practical way to apply new fare structure. WYTCL to agree aligned fare structure for multi operator products	TfN IST work stream and implementation of ABBOT.	Will require some funding for undertaking this work. Could resource be jointly provided by WYCA and the Operators?	No	WYCA Tracker Survey & Transport Focus Reference to the Digital Payment for Travel Strategy performance management framework
Shared ticketing agreement across all operators	Shared ticketing agreement to include: - Disruption and tender changes. - Ticket acceptance between operators working same route a different times of day. - Staff pass acceptance.	Defined agreement for tender changes similar to Husky protocol. Agreement on ticket acceptance between all operators.	Agreement across bus operators that will be cascaded to operational staff.	None	None required	Agreement on staff pass acceptance across bus operators that will be cascaded to operational staff.	WYCA Tracker Survey & Transport Focus Feedback from operator employees Digital Payment for Travel Strategy performance management framework
Season ticket customer compensation	Customers holding season tickets to be compensated in the event of major service disruptions	Develop an agreement across operators/WYTCL to compensate season ticket holders when major service disruption occurs	Agreement across Bus Alliance members that will be cascaded to operational staff. Process for claiming compensation to be agreed with WYTCL.	None	None required	No	Monitoring of customer compensation claims WYCA Tracker Survey & Transport Focus
All fares and ticketing information available through open data	A legal requirement that will be partially delivered through TfN	Fares and ticketing information to be made available through open data	Fares and ticketing information will be hosted by TfN's Open Data Hub, together with disruption messaging. Fares, routes and timetable information for small operators will be hosted by DfT.	TfN's development of open data hub.	Partially being delivered / funded by TfN/DfT. WYCA already provide some resource to validate information received from operators – question about whether further resource will be required at WYCA for fares validation or if this will be funded by DfT?	No	WYCA Tracker Survey & Transport Focus

Output	Description	Outcome	How It Will Be Delivered?	Dependencies	Funding	Early Deliverable	Performance Management
A communications plan for ticketing options	Plan identifying specific publicity for each of the ticket types where a gap in awareness has already been identified by the Alliance and WYTCL.	Publicity of good value that bus fares represent (First) Cost per trip vs price Develop 'fare finder' online Develop best fare promise	Identification of appropriate resource to deliver the plan (WYCA/Operator/WYTCL) and delivery with oversight from Bus Alliance. Regular customer and stakeholder updates from the Alliance to support messaging	Interaction with WYTCL communications plan.	Funding and delivery committed by WYTCL.	Development of communications plan for ticketing options.	Media monitoring Measurement of before/after awareness levels.

Workstream: Ticketing and Affordability

Commitment: Fare Offers for Young People

Co-leads: Kate Gifford and Martin Hirst

Output	Description	Outcome	How It Will Be Delivered?	Dependencies	Funding	Early Deliverable	Performance Management
65 Simple, clear and affordable fares structure and ticketing offer across the bus network for Under 19's and Under 25's	<p>Work with WYTCL to develop new products where relevant (e.g. for apprentices) and ensure that existing ticket options are easy to understand and made available on MCard app.</p> <p>Work with Operators to determine if additional Operator own products are required.</p> <p>Investigate ways to allow parents to purchase tickets for young people and share using mobile technology.</p>	<p>MCard available on app/on smart</p> <p>Being able to understand matrix of ticketing options – development of an easy to use online fare finder?</p> <p>Better ticketing options for apprentices including Operator own products.</p> <p>Half fare travel for 5-18s travelling into WY for school</p> <p>Reviewing online application fees for MCard</p>	<p>MCard actions through WYTCL.</p> <p>WYCA funding for some elements e.g. app development.</p> <p>Operators responsible for their own products.</p> <p>Roll out of ticket sharing functionality on mobile phones (First already have this on their app)</p>	<p>WYTCL work plan.</p> <p>This work is already underway as part of the Digital Payment for Travel strategy work plan.</p>	<p>Technical work funded through WYCA.</p> <p>WYTCL to fund promotion and marketing etc.</p>	No	<p>WYCA Tracker Survey & Transport Focus</p> <p>Reference to the Digital Payment for Travel Strategy performance management framework</p>
Clear promotion and application of low cost travel for young people to include clarity on ID requirements for entitlement tickets	<p>Actions to ensure that travel for young people is affordable. Communications plan to be developed to ensure clear and consistent messaging to young people of fare/product options.</p>	<p>Clear set of customer promises with possible maximum fare</p> <p>Develop comms plan to cover year to target back to school/college.</p> <p>Clear & consistent eligibility on all products and all operators</p> <p>Identify lessons from other areas that have removed ID requirements.</p>	<p>Include information in school entry packs. Information about id requirements and school uniform policy etc should be communicated in September.</p> <p>Links with WYTCL.</p> <p>Operator and Metro website development to help 'find ideal fare'</p>	<p>Online pass/smartcard offer being delivered through existing SCIP programme (WYCA).</p> <p>Need discussion with WYTCL about joint promotion/communications.</p>	<p>WYCA funding for online pass/smart card element.</p> <p>Communications to be delivered as part of WYTCL plan?</p>	<p>Development of wider Bus Alliance Communications plan.</p> <p>Clear promotion and application of low cost travel for young people-need to identify how this could be funded.</p> <p>Suggested that promotion could tie in with the start of the school year</p>	<p>WYCA Tracker Survey & Transport Focus</p> <p>Media monitoring</p> <p>Measurement of before/after awareness levels.</p>
A revised concessionary scheme for young people	<p>Needs further consideration as to whether this means expansion to more ages</p> <p>Formalise / revise existing rules/principles</p>	<p>New agreement with Operators for distribution</p>	<p>Discussion with Bus Alliance meetings with operators</p>	None	<p>Work to be led by Bus Alliance.</p>	No	<p>Monitoring of uptake</p> <p>WYCA Tracker Survey & Transport Focus</p>
Better intelligence on young people's market to help better understand growth opportunities	<p>Understand trends in young people's travel</p> <p>Understand gaps in coverage of existing products.</p>	<p>'Story map' for each key question identified for research. This presents maps of the relevant data and analysis of trends/insights.</p>	<p>WYCA Research and Intelligence team to develop 'Story maps'.</p>	<p>This work is already underway as part of the Digital Payment for Travel strategy work plan.</p>	<p>This is already included in the R+I team's work plan so no additional funding required.</p>	<p>Already underway as part of the Digital Payment for Travel Strategy work plan.</p>	<p>Reference to the Digital Payment for Travel Strategy performance management framework</p>

Output	Description	Outcome	How It Will Be Delivered?	Dependencies	Funding	Early Deliverable	Performance Management
Making ticketing products smart so we can collect data/insight into usage.	Ensuring that all ticketing products have smart equivalent and that these options are promoted. Work with WYTCL to develop pricing offers for customers purchasing tickets through the app.	All products have smart equivalent Promotion of smart alternatives Price differentials on smart	Iterative development of MCard app will enable a wider range of products to be added. Work with WYTCL to develop pricing offers for customers purchasing tickets through the app. Communications plan to be developed to promote new and existing ticketing products.	Interaction between this work stream and the intelligence on young people's market work stream. Part of this work stream being delivered through the Digital Payment for Travel Strategy.	WYTCL are exploring the possibility of creating the MyDay ticket on smartcard and introducing carnet option.	No MyDay on smart could be quick win?	Reference to the Digital Payment for Travel Strategy performance management framework

Work stream: Travel Information

Co-leads: Mike Nolan and Ben Mansfield

Commitment	Output	Description	Outcome	How It Will Be Delivered?	Dependencies	Funding	Early Deliverable	Performance Management
67 Live Travel and Journey Planning Information	Travel information that reflects the live network	Provision of audio and visual information on buses, with consistent naming convention.	Screens and on-board announcements to inform customers of next stop. Improved information offer, which addresses issues highlighted that are preventing bus use	By operators – need to understand plans for roll out	Bus Services Act Bus information Strategy	To be identified	Already in place on some buses Understand the rollout of plans of operators and their intentions to install AVI and identify any gaps	WYCA Tracker Survey & Transport Focus
		Using wi-fi for key messages	Key event/disruption information provided via wi-fi	Messages to be agreed collectively and entered into operator systems.	Bus Information Strategy	No specific funding required	Operators to explore this	WYCA Tracker Survey & Transport Focus
		Ensure the provision of accurate and consistent travel information via operator, WYCA and third party journey planners online and via smartphone. Real time screens in stops and shelters and via QR codes at all stops. Regular updates via social media.	Information that is 'always live'.	Establish Real Time group between operators, WYCA and suppliers	Bus Information Strategy	No funding required	Work on-going. Establishing the Real Time group	WYCA Tracker Survey & Transport Focus
	Accurate data compilation and efficient transfer	Explore possibilities of improving the transfer of data between operators and the Combined Authority	Potential efficiencies in the transfer of data/information relayed via customer outputs	Establish Real Time group between operators, WYCA and suppliers	Bus Information Strategy	Requirement for funding needs to be understood	No	WYCA Tracker Survey & Transport Focus
	Provision of open data including fares information	Make route, timetable and fares information available via open data. Explore the opportunities that open data can provide to the alliance in the emergence of new technologies that will enhance the customer offer.	Customer can easily access travel planning information and cost from their preferred journey planning sources e.g. traditional, digital	Establish an information management group between operators and WYCA	Bus Information Strategy Simple fare structure Increasing off-bus sales Fare offers for young people	Requirement for funding needs to be understood	No	WYCA Tracker Survey & Transport Focus
	Providing information and advice to make buses more attractive for young people to use	Understand the information that will make bus use more attractive to younger people via Liaison with the Youth Council.	More young people using buses	In collaboration with Leeds Voice & Influence team	Fare offers for young people. Bus Information Strategy Digital payment strategy.	Requirement for funding needs to be understood	No	Monitoring of patronage increases WYCA Tracker Survey & Transport Focus

Commitment	Output	Description	Outcome	How It Will Be Delivered?	Dependencies	Funding	Early Deliverable	Performance Management
Disruption collaboration	A tool that facilitates provision of disruption information (delivering through TfN)	Work with TfN on the development of their disruption messaging solution.	Planned disruption information to be included in journey planners.	TfN – phase 2 of IST programme	TfN delivering a viable tool/open data portal Bus Information Strategy	TfN to fund development, ongoing operation TBC	No	WYCA Tracker Survey & Transport Focus
	A plan developed with bus operators regarding use of assets to disseminate information	Agree a plan for the dissemination of planned and unplanned disruption. Including agreement on tone of voice and how we may use the bus as a means of accessing events. To include agreement on a comms plan for disruption caused for works taking place to deliver highway schemes connected with LPTIP. A more co-ordinated approach to the use of social media for reporting of disruptions	One version of the truth and consistent tone of voice.	Establish an information management group between operators and WYCA	Bus Information Strategy	No funding required	The plan will be the early deliverable.	WYCA Tracker Survey & Transport Focus
68 Improve Real Time Information	Services cancelled in the system in real-time to ensure accuracy of customer facing outputs	Re-establish Real Time Group to establish agreement on the protocol for cancelling services in the Real Time system.	Services showing cancelled when not operating.	Establish Real Time group between operators, WYCA and suppliers	Bus Information Strategy	Requirement for funding needs to be understood	No	WYCA Tracker Survey & Transport Focus
	An action plan to address 'phantom buses'	Re-establish Real Time Group to determine an action plan to reduce episodes of the 'phantom bus' and introduce a mechanism for recording.	Reduced occurrences of buses counting down on displays but not appearing	Establish Real Time group between operators, WYCA and suppliers	Bus Information Strategy	Requirement for funding needs to be understood	In progress – the action plan will be the early deliverable.	WYCA Tracker Survey & Transport Focus
	Improved quality of data supplied, monitored via quality assurance	Real Time Group to monitor data quality and report back to operators on a periodic basis to drive up quality and identify where issues are occurring.	A strategy to improve data sharing between the Combined Authority and operators	Establish Real Time group between operators, WYCA and suppliers	Bus Information Strategy	Requirement for funding needs to be understood	No	WYCA Tracker Survey & Transport Focus
	Open provision of vehicle movement data	Real Time Group to explore the opportunities presented by open data, including the possibility of combining VM and SM feeds.	High quality data available for consumption in third party applications.	Establish Real Time group between operators, WYCA and suppliers	Bus Information Strategy	Requirement for funding needs to be understood	No	WYCA Tracker Survey & Transport Focus
	Understand opportunities that may be provided via generic ETMs across all operators	Real Time Group to understand any potential opportunities to make use of generic ETM hardware across all operators as a potential to facilitate delivery of real time information	Potential improvements in the provision of information	Establish Real Time group between operators, WYCA and suppliers	Bus Information Strategy	Requirement for funding needs to be understood	No	WYCA Tracker Survey & Transport Focus

Workstream: Customer Service

Co-leads: Jackie Vater and Paul Turner

Commitment	Output	Description	Outcome	How It Will Be Delivered?	Dependencies	Funding	Early Deliverable	Performance Management
On Board Customer Facilities	The latest on-board passenger facilities e.g. information, charging points and free Wi-Fi	Develop a consistent customer offer ensure this is simple and easy to understand for customer.	Improved Customer Offer	Bus Operators Combined Authority Institute of Customer Service (ICS)	Operator buy-in from front line staff to managerial level Investment/finance Funding for small operators	To be identified	On-going	Tracker Survey and Transport Focus survey
	Develop awareness of how developing technologies can be future-proofed	Put processes in place to keep the offer under review and develop as technology changes and develops	Improved Customer Offer	Bus Operators Combined Authority ICS West Yorkshire Ticketing Company Ltd	Possessing the correct expertise Finance	To be identified	N/A	Tracker Survey and Transport Focus survey
CG	Develop a customer charter	Create a customer charter that sets out clear standards and guidelines that our customers can expect from all parts of their journey, pre, during and post journey.	Improved customer offer	Bus Operators Combined Authority ICS	Combined Authority and Operator buy-in Presentation of public information	To be identified	Meeting with the ICS due to be arranged to inform next steps	Tracker Survey and Transport Focus survey
	Consistent Customer Service Offer	Agreed set of customer satisfaction measures, training and engagement	Improved customer offer	Bus Operators Combined Authority ICS	Allocated time for training Finance Identifying the right types of training for the right staff Comms and Engagement workstream	To be identified Some engagement to be funded through current internal resource Further engagement may require funding (to be identified)	Establish baseline Review training across all partners Work with Comms & Engagement workstream	Tracker Survey and Transport Focus survey Mystery Shopping
		Customer research to identify passengers wants and needs and inform customer service improvements	Create ongoing programme of customer research and insight in order to create a Customer charter that is designed around the customer's requirements, behaviour, travel patterns and use of technology.	Improved customer offer	Combined Authority's Research and Intelligence team Combined Authority Tracker Survey Transport Focus research Information gathered through consultations Operators – opportunities to utilise and share any research undertaken Initiative specific research – identifying specific issues and investigating them further	Resource to collate and analyse information	Utilise on-going internal research Funding to be identified for anything above that	Annual research surveys – on-going Identify research to be utilised – will inform gaps in knowledge and prompt further questions

Workstream: Communication and Engagement

Co-leads: Martin Driver and Brandon Jones

Output	Description	Outcome	How It Will Be Delivered?	Dependencies	Funding	Early Deliverable	Performance Management
<p>Our Key Audiences</p> <p>People of West Yorkshire</p> <p>Bus users <i>Non-bus users*</i> <i>Young people*</i></p> <p>Business Leaders</p> <p>*Specific target groups</p>							
	<p>Internal Stakeholders</p> <ul style="list-style-type: none"> - Staff - All Councillors - All District Colleagues <p>External Stakeholders</p> <ul style="list-style-type: none"> - MPs - Govt. departments 						
<p>Corporate Comms</p> <p>Set of key Bus Alliance messages based around the three Cs of Cleaner Air, Customer Care and Connectivity.</p>	<p>A set of key messages reflecting the aims and objectives of the Alliance.</p> <p>These should provide the basis of all Alliance Communications and any Alliance-related communications carried out by members and partners.</p>	<p>Consistent communications messages will build sustainability, momentum and confidence in the Alliance and support for its work.</p> <p>Progression for Bus18</p> <p>Raised profile of bus and its importance to jobs, businesses & economy</p>	<p>Through a coordinated Alliance Communications grid* and plan updated and agreed as a fixed Communications item on Steering Group meetings.</p> <p>*e.g. attached.</p>	<p>Steering group.</p> <p>Workplan Leaders updating on progress</p> <p>External events providing opportunities.</p>	<p>Initial communications likely to be manageable through in-house resources.</p> <p>Impact of workplan-generated comms could require external resource.</p>	<p>Media stories/articles reinforcing Alliance key messages.</p>	<p>Delivery against Communications grid.</p> <p>Media monitoring</p> <p>Measurement of before/after awareness levels.</p> <p>Monitor achievement of overall Alliance objectives.</p>
<p>Workplan Comms</p> <p>Communications resulting from agreed Workplans</p>	<p>Communications feeding into the overall grid on how we are working to achieve aims set out in key messages.</p> <p>Includes publishing performance data</p>	<p>Builds on the above</p>	<p>As above</p>	<p>Workplan Leads/Steering Group</p>	<p>As above</p>	<p>To be determined by workplan groups.</p>	<p>As above</p>
<p>Internal Communications</p> <p>Regular Alliance Communications to all members' staff.</p> <p>Engagement and awareness activity</p>	<p>Regular materials/messages that member organisations can cascade to all staff.</p> <p>Possible events such as ceremony to acknowledge award winners.</p> <p>Bus driver engagement</p>	<p>Ownership of the Alliance and its values and the encouragement of active participation/input.</p> <p>Review how product knowledge is strengthened with driver colleagues</p>	<p>As above. Coordinated and then through members' internal comms</p>	<p>Steering Group</p> <p>Members' Communications teams.</p>	<p>As above</p>	<p>Initial 'newsletter' about the Alliance including key messages in production</p>	<p>As above</p>
<p>External Events Comms</p> <p>Communications relating Bus Alliance to external events e.g.</p>	<p>Bus Alliance news stories/events relating to each of these.</p>	<p>Builds on the above and highlights wider context of Alliance work, aims and achievements</p>	<p>As above</p>	<p>Steering Group</p>	<p>As above</p>	<p>UN Road Safety Week & Mental Health Awareness Week - May</p>	<p>As above</p>

<ul style="list-style-type: none"> - World Health Day - World Environment Day - Clean Air Day - Catch the Bus Week (?) 				Coordination with internal colleagues and partners' plans.		World Environment Day, Clean Air Day & International Women in Engineering Day - June	
<p>Bus Alliance Members' Initiatives</p> <p>Messages on how our own schemes e.g.</p> <ul style="list-style-type: none"> - West Yorkshire-plus Transport Fund - Connecting Leeds are meeting aims of the Alliance. 	Inclusion of Alliance impacts in communications on our own schemes	Awareness of importance of bus and it's place in wide image of schemes.	As above	Comms streams e.g. West Yorkshire-plus Transport Fund Monitoring/feedback of impacts on bus travel from completed schemes	As above	Elland Road P&R extension Stourton/A61 New West Yorkshire-plus Transport Fund & LIPTP schemes emerging.	As above
<p>Stakeholder Communications</p> <p>Regular communications to identified influencers e.g. MPs/DfT</p>	Update briefings of all messages to influencers e.g. MPs/DfT	Acknowledgement and support for Alliance's aims, achievements and requirements plus backing for its messages	As above Existing B2B connections and Travel Plan Network	Steering Group	As above	Identify and agree stakeholders	As above
<p>Direct Customer Communications</p> <p>Inclusion/reference to Alliance key messages in existing passenger comms materials.</p>	Inclusion of Alliance key messages in customer information materials.	Coordinated, Alliance-wide communication of positive and negative messages	As above	Steering Group Members' Communications teams	As above	May Service changes	As above
<p>Target Audience Communications</p> <p>Messages, materials and events aimed specifically at these target groups</p> <ul style="list-style-type: none"> - Young people - Non-users 	Messaging/promotion aimed specifically at identifying barriers and incentives and overcoming them for target groups.	Barriers overcoming	As above Travel Plan Network	Steering Members' Comms teams	As above	Martin Hirst arranging meeting with Brandon Jones and Stephanie Burras to discuss the way forward with Ahead Partnership	As above
<p>Engagement</p> <p>Communications/actions based upon customer feedback.</p>	<p>Consultation with users and non-users using adapted, existing, third-party and specifically commissioned research to inform Alliance work and communications messages.</p> <p>Engage with key groups – internal and external through existing and specially arranged channels.</p>	<p>Informed work</p> <p>Better targeted communications and messages and understanding of barriers for non-users.</p> <p>Positive engagement of groups</p>	As above Coordinated through Alliance members' Comms teams for existing consultation work. Third-party suppliers.	Steering Group Members' Comms teams	As above	<p>Establish a Young People's Bus Alliance Consultation Group in each district.</p> <p>Identify all potential sources of feedback.</p>	As above

Workstream: Highway Infrastructure

Commitment: Highway Improvement Programme

Co-leads: Helen Ellerton and Ricky Lake

Output	Description	Outcome	How will it Be Delivered?	Dependencies	Funding	Early Deliverables	Performance Management
Programme of highway works delivered across West Yorkshire	Delivery of West Yorkshire Transport Fund, Transforming Cities Fund and Connecting Leeds schemes –list of schemes that provide benefits to the bus to be included	Greater coverage of bus priority measures improving bus journey times and improved operational conditions leading to an improved bus service offer	District capital delivery programmes	None	Projects identified through West Yorkshire Transport Fund, Connecting Leeds, Transforming Cities Funds and LTP	Schemes identified	Monitoring of operator punctuality and reliability statistics WYCA Tracker Survey & Transport Focus
Improved frequency or operation of service on routes where investment has taken place	Increased frequency and/or improved service on corridors identified for investment	Improved customer offer	The delivery of the highway improvements will guarantee improved reliability leading to a more stable frequency. Demand will be reviewed and where required analysis will determine if the frequency needs increasing.	Delivery of key bus infrastructure that improves journey times	Operational savings	Linked to early deliverable schemes	WYCA Tracker Survey & Transport Focus
Flexible delivery of bus services to reflect operating conditions	Proposals to ensure a dynamic plan is in place to ensure services are adapted to the operating environment, for example the number of buses operating in the peak period reflects demand	Improved customer offer	Better analysis of data using latest systems that can better design timetables based on existing data. Newer ticket machines coupled with Optibus details the timetable that should be operating.	Delivery of key bus infrastructure that improves journey times	To be identified: capital funding opportunities and operational savings	Linked to early deliverable schemes	WYCA Tracker Survey & Transport Focus
Development of a prioritised list of congestion hotspots that cause delay to buses. Apply standard mechanism to develop schemes and access funding	Collation of prioritised small schemes to develop a pipeline, which addresses congestion hotspots that cause delay to buses	Greater coverage of bus priority measures improving bus journey times and improved operational conditions leading to an improved bus service offer	District Punctuality and Reliability Group	None	West Yorkshire Transport Fund, Connecting Leeds, Transforming Cities Funds and LTP	Schemes to be identified	Monitoring of operator punctuality and reliability statistics WYCA Tracker Survey & Transport Focus

Output	Description	Outcome	How will it Be Delivered?	Dependencies	Funding	Early Deliverables	Performance Management
Clear communications protocol	To develop a communications plan for WYCA, West Yorkshire districts and bus operators to deliver in advance of and during times of planned roadworks and future plans. The communications protocol should include embedding selling the benefits of the scheme during consultation and close working with contractors	Improved customer offer during times of disruption	District punctuality and Reliability Group	None	LTP	Protocol could be developed early on set up of the District Punctuality and Reliability Group	Media monitoring Measurement of before/after awareness levels. WYCA Tracker Survey & Transport Focus
Embed bus operator engagement as part of the Combined Authority approval process	Ensure bus operator engagement is part of the business case approval process to ensure designs are sympathetic to bus operations and consultation responds to the benefits to the bus	Minimised impact on bus passengers and improved customer offer	Working with WYCA Programme Management Office to identify point in process	None	None required	Can be delivered early	WYCA Tracker Survey & Transport Focus
Establish Bradford and Calderdale Bus Partnership Groups	Strengthen the relationship between districts and bus operators within the districts to ensure local delivery conditions can be improved	Improved working relationship to maximise funding opportunities	WYCA to engage with the district and operators	Resource availability	None required	Can be delivered early	WYCA Tracker Survey & Transport Focus
Bus Network during times of planned disruption	Undertake early engagement between scheme promoter and bus operators to allow for disruption timetable to be developed and delivered for a longer period, reducing number of changes to bus service routings	Improved customer offer	District Punctuality and Reliability Group	None	None required	Can be delivered early	WYCA Tracker Survey & Transport Focus
West Yorkshire Permit System	Review the West Yorkshire Permit System and understand if efficiencies can be identified	Improved operating environment	District Punctuality and Reliability Group to liaise with permit system	Resource availability and the setting up of the District Punctuality and Reliability Group	Once set up its each partners resource that in effect funds themselves	Should be an early deliverable, a lot depends on the dependency	Monitoring of improvements to the operating environment
Bus priority enforcement	Increase coverage of district bus lane enforcement and enable bus operators to utilise cameras on their vehicles to also monitor bus lanes	Maximising highway infrastructure	District Punctuality and Reliability Group liaison	Resource availability and the setting up of the District Punctuality and Reliability Group	District and operator funding	Some locations could be identified as early deliverables	Monitoring of operator punctuality and reliability statistics

Work stream: Highway Infrastructure

Commitment: Bus Waiting Infrastructure

Co-leads: Helen Ellerton and Ricky Lake

Output	Description	Outcome	How It Will Be Delivered?	Dependencies	Funding	Early Deliverable	Performance Management
Develop a hierarchy of waiting infrastructure provision	Develop a clear understanding and delivery plan for the provision of waiting infrastructure, ensuring where there is significant usage a covered and seated waiting area is provided	Improved customer offer	WYCA Facilities and Assets to review existing provision in line with the core bus network	Definition of the core bus network	Infrastructure programmes: West Yorkshire Transport Fund; Connecting Leeds; Transforming Cities Fund, LTP	On definition of the core network a review can be undertaken to ensure the correct locations have the right infrastructure	WYCA Tracker Survey & Transport Focus
Review maintenance protocol for waiting infrastructure	Develop a strong protocol for waiting infrastructure maintenance that ensures the core route network waiting infrastructure is maintained to a high standard	Improved customer offer	WYCA Facilities and Assets to review existing protocol and funding availability	Resource availability	Revenue funding available	Ongoing	WYCA Tracker Survey & Transport Focus
Review bus stop clearways: provision and enforcement	To understand and review bus stop clearways to improve bus docking. To prioritise and deliver improvements	Improved bus operations and customer access to the bus network	The District Punctuality and Reliability Group	None	To be identified. LTP to be prioritised to fund outside of West Yorkshire Transport Fund; Connecting Leeds; Transforming Cities Fund,	Review to be undertake early, delivery to form part of a longer term programme	Monitor operator punctuality and reliability statistics WYCA Tracker Survey & Transport Focus
Pedestrian access to bus stops	To review pedestrian access to bus stops on the core route network and develop a prioritised list of schemes, identify funding for delivery	Improved customer access to the bus network	The District Punctuality and Reliability Group	None	To be identified. LTP to be prioritised to fund outside of West Yorkshire Transport Fund; Connecting Leeds; Transforming Cities Fund	Review to be undertake early, delivery to form part of a longer term programme	WYCA Tracker Survey & Transport Focus
Clear bus stop passenger information	To provide clear passenger information, including maps, journey planning information. Understand customer preference of type of customer information provision	Improved customer offer	Alongside the Travel Information Work Stream	Information Strategy; Travel Information Work Stream	To be identified	As per the Information Strategy	WYCA Tracker Survey & Transport Focus

Work stream: Service Provision

Commitment: Bus Network Structure & Operating Hours

Co-leads: Helen Ellerton (interim) and Dwayne Wells

Commitment	Output	Description	Outcome	How It Will Be Delivered?	Dependencies	Funding	Early Deliverable	Performance Management
75 Bus Network Structure	A delivery plan to be informed by the bus network review and the Combined Authority tender renewal process. The plan will set out the requirements for the network, cost for delivery and action plan for implementation.	Seeking to change bus network to meet future needs in housing and land use.	A bus network that optimises funding and provision of services	Combination of supported and commercial services, some commercial resource may be sprung from journey time savings on highway schemes, particularly LPTIP. More creative use of Section 106 funding to pump prime services.	District Council strategies	Planning funds and joint funding with operators. Recycling of capital funds into revenue through additional bus priority/ infrastructure	Meet with Directors of Development across Districts on Planning.	Delivery of the plan WYCA Tracker Survey & Transport Focus
	Local centres served by an integrated network of scheduled and demand responsive bus services and community transport	Seeking to change bus network to meet future needs in housing and land use.	A bus network that optimises funding and provision of services	Need to establish a lead for CT coordination. Identify gaps, seek funding (revenue) and explore technical solutions	Network review programme to identify gaps	Needs a mechanism. Should we view taxis as part of PT mix or a competitor - could this provide funding? Set up delegated transport fund to provide capital to CT/rural areas/operators	Review outputs from network review. Map CT sector	WYCA Tracker Survey & Transport Focus
	Provide clear role for taxis in the bus network structure	Understand how taxis can be integrated into the public transport offer	A bus network that optimises funding and provision of services for all	Collaboration across all transport providers	Taxi participation, Licensing Authorities	Commercial agreement	Dialogue with taxi associations and Uber exploring opportunities	WYCA Tracker Survey & Transport Focus
	Frequent and reliable onward access to the city centre and other key locations.	Review city/town centre routing and stopping strategies and develop actions for their reconfiguration	Wayfinding from main alighting points in Town and city centres – could be electronic QR code? Links need to be improved between different information modes e.g. stops and website as info can differ	Collaboration WYCA, Districts and operators. Creating strong working links through the information strategy	District Council strategies and funding	Capital funds, growth deal etc.	Should be achievable year 1	WYCA Tracker Survey & Transport Focus

	Managing demand at busy times on the bus network is served by adequate capacity	Review operational practices to ensure the capacity of the bus services meets demand	Improved customer offer	Collaboration with operators to review peak hour operations	Operator participation, open data	Funding should be in place through operators – improved reliability should improve demand.	Data analysis of scheduled v actual across pm peak, lost mileage	WYCA Tracker Survey & Transport Focus
Bus Operating Hours	A plan for extending frequency in the late peak (from 6pm to 8pm) on the core network	Later journeys to ensure commuters can have an attractive frequency when returning to home towns/cities, better serving changing travel patterns and providing later services to hospitals for visiting.	Improved customer offer	Identify current gaps in network	Self-financing and reallocation of tendered services budget	Guaranteed frequency to main hospitals across network	Guaranteed frequency on core routes across network	Implementation of late peak frequencies WYCA Tracker Survey & Transport Focus

Workstream: Service Provision

Commitment: Network Security & Emergency Planning

Co-leads: Helen Ellerton (interim) and Dwayne Wells

Commitment	Output	Description	Outcome	How will it be Delivered?	Dependencies	Funding	Early Deliverable?	Performance Management
77 Network Security	Management of anti-social behaviour	Development of a joint protocol across operators and the Combined Authority to ensure volume/severity of anti-social behaviour remains low.	A safer transport network	Set up a task and finish group	Police/NE counter Terrorism advice and support staff/safer travel teams	Existing internal funding	Develop ASB database across all operators (GDPR?). Investigate funding for small operators to equip with low cost CCTV solution. Review current PCSO resource	Monitoring number of anti-social incidents WYCA Tracker Survey & Transport Focus
	Regular communication with agencies involved with reducing anti-social behaviour and preventing terrorist incidents	Develop an action plan and close working relationship between operators and the Combined Authority to ensure threats to the transport network are minimised	A safer transport network	Set up a task and finish group			Establish a link with safer roads partnership. Work together on Special Constable initiative	Monitoring number of anti-social incidents WYCA Tracker Survey & Transport Focus
	A major incident protocol	Develop a joint protocol to manage a major incident in West Yorkshire. Ensure Alliance is involved	A safer transport network	Set up a task and finish group			A review of emergency event protocols across WY (local authorities) to assess consistency of approach	Review of effectiveness of protocol, if a major incident occurs
Emergency Planning, Major Highway Events and Resilience	24 hour control room where unexpected incidents and planned event/closure diversion routes are managed	Delivery of the Transport Coordination Centre to ensure operators can work closely with event planners	A bus network that is responsive to local conditions	Working with operators to agree terms of Transport Coordination Centre	West Yorkshire UTMC	West Yorkshire Transport Fund	In progress	WYCA Tracker Survey & Transport Focus

Workstream: Air Quality & Carbon Zero

Co-leads: Helen Ellerton and Neil Toner

Output	Description	Outcome	How It Will Be Delivered?	Dependencies	Funding	Early Deliverable	Performance Management
To have 80% as Euro VI or an alternative technology by January 2021 and 100% by 2026	To continually upgrade all vehicles that are operating in West Yorkshire.	Improved air quality. Reduced emissions from the buses operating in West Yorkshire	Identify and take up funding opportunities in addition to existing retrofit programmes and clean bus technology programme. Have close engagement with small operators to ensure they take up opportunities.	Further developments of Euro standards and what might that mean for operators.	To be identified. Carbon Zero Roadmap will identify alternative sources of funding. Additional retrofit funding obtained	A further £2.9m of retrofit funding obtained March 2019. To be delivered by September 2019	% of Euro VI or an alternative technology vehicles Air Quality Monitoring
To have 95% of buses operating in evenings and on a Sunday to be Euro VI or better	To maximise the low emission buses during times of low frequency services	Improved air quality	Operators to ensure fleet is adequately deployed	None	Not required	Can be delivered immediately	% of vehicles Euro VI or better operating in evenings and on a Sunday Air Quality Monitoring
7 A roadmap defining steps towards a carbon free bus service	Consultancy support to understand how West Yorkshire can migrate to become an emission free bus operation. This will provide understanding of the market position for new technologies and battery life	Improved air quality. Reduced emissions from the buses operating in West Yorkshire. Help to meet carbon emissions reduction commitments.	Consultants have been appointed	Dependency on new and developing technology where major cost to supplier not factored into budgets due to lack of knowledge. Range/mileage of EV buses is a major issues. Potential massive infrastructure costs for substation upgrades, charging points at bus stations or bus stops. Migration to new (partly unproven) EV bus technology likely to impact service as it develops and improves.	Initial consultancy support is funded. Future funding to deliver technology to be identified	Initial roadmap is in development.	Progress towards a zero carbon fleet Air Quality Monitoring
Shaping the fleet replacement, refurbishment and deployment programme	To ensure West Yorkshire is prioritised by bus operators to bring in latest technology in buses to the region	Improved air quality. Reduced emissions from the buses operating in West Yorkshire	Working with operators to identify funding opportunities and minimise impact of older fleet being cascading within West Yorkshire	Air quality requirements will shape fleet replacements. Agreeing the target for Euro VI or other fuels will focus delivery of new fleets. Operator's ability to cascade older fleet out of WY may not be possible. Requires understanding of air quality plans in other towns and cities in West Yorkshire.	Further funding may be available for retrofit or new technologies –to be identified	Dependent on availability of funding	% of Euro VI or an alternative technology vehicles Air Quality Monitoring
Develop clear communications plan highlighting air quality issues, air quality	Communication plan and protocol for highlighting air quality challenges in West Yorkshire and using this to identify opportunities	A raised profile of the air quality problems and requirements for West Yorkshire	To be delivered through the District Punctuality and Reliability Group	Set up of District Punctuality and Reliability Group	Clean Air Funding available	To be delivered quickly on set up of District Punctuality and Reliability Group	Media monitoring Measurement of before/after awareness levels.

Output	Description	Outcome	How It Will Be Delivered?	Dependencies	Funding	Early Deliverable	Performance Management
management areas and improvements being made by bus of West Yorkshire							
Develop a clear communications plan to promote the bus as the natural way to travel	Communications plan to promote the bus and generate behavioural change. Work with Connecting Leeds behavioural change programme.	Increase patronage and improve air quality	Providing funding for marketing, promotion and behavioural change activities to increase bus travel	Connecting Leeds behavioural change programme	Revenue funding to be identified. Connecting Leeds to fund initial deliverable	Long term delivery	Monitoring of patronage levels Air quality monitoring
Deliver the supporting infrastructure required for future technology of buses	Understand the forward direction of the bus technology for all of West Yorkshire and identify funding opportunities for infrastructure	Improved air quality. Reduced emissions from the buses operating in West Yorkshire. Greater availability to support other technologies for the buses	Following completion of the roadmap, identify funding opportunities for infrastructure	Other infrastructure programmes	To be identified	Long term delivery	Air quality monitoring Level of infrastructure before and after
Deliver a bus service that utilises a new technology	Undertake a trial or deliver a permanent service that utilises a new technology	Improved air quality. Reduced emissions from the buses operating in West Yorkshire	Following completion of the roadmap, identify funding opportunities for infrastructure and work with the operators to deliver a bus service	Understand outcomes of Stourton Park and Ride electric service. Need to apply alternative technology to a different type of operation.	To be identified	Stourton Park and Ride is the early delivery.	Air Quality monitoring
S106 funding	To maximise opportunities with S106 to deliver new bus services or provide funding to deliver low emission buses	Improved air quality. Reduced emissions from the buses operating in West Yorkshire	Work with Local Authority planning to identify S106 funding opportunities	Development sites	S106	Long term change required to planning system	Air Quality monitoring
Reduced on-route emissions.	To provide driver training to improve driving style to reduce emissions. To reduce idling and ensure depots are low carbon. To improve coordination of existing programmes and ensure there is continuous improvement	Improved air quality. Reduced emissions from the buses operating in West Yorkshire	Bus driver training programme. Systems installed on bus can monitor and report on driving performance already.	Wider driver training programmes. Systems provide data however operators/depots need to manage it, address issues and drive standards up	Operators to be incentivised to drive efficiently	Operators to share their driver performance in relation to emissions	Performance reviews Mystery shopper Air quality monitoring
Bus Network routing	Understand the number of buses operating through densely populated areas and whether there is an opportunity to review the routing and the buses operating in these area	Improved air quality. Reduced emissions from the buses operating in West Yorkshire	On completion of the bus network review develop a delivery plan to review the detailed bus routing in priority areas	Route is key to punctuality, maximising passenger, schedule efficiency and revenue.	None required	Route identification could be done early	Air quality monitoring

Work stream: Economy of the Bus Network

Co-leads: Helen Ellerton and Dwayne Wells

Commitment	Output	Description	Outcome	How will it be Delivered?	Dependencies	Funding	Early Deliverable	Performance Management
Economic Assessment	Integration with other modes of transport	Understand how the bus can work with other areas of transport to deliver customer outcomes with reducing tendered services budget	Improved customer offer	Working with taxi companies	Third party discussions	To be identified	Initial discussions can be started	WYCA Tracker Survey & Transport Focus
	Clear communications plan for bus network changes	To develop a clear communications protocol for bus network changes, changes to contracted service providers and provide a process for integrating the new offer	Improved customer offer	Work with communications and engagement teams to develop protocol	None	Operator funding.	A protocol could be tested early	WYCA Tracker Survey & Transport Focus
	Action plan for 'at risk' bus routes due to limited revenue compared with the cost	Identify the 'at risk' bus routes that are likely to be changed or lost due to market conditions. Develop an action plan in a timely manner to test prior to service changes being made	Improved customer offer	Operators and WYCA	Reducing tendered services budget	To be identified	Identification of routes could be an early deliverable, requires a long term delivery plan	WYCA Tracker Survey & Transport Focus
	Increasing patronage	Early developer and planning authority engagement to ensure the core network is attractive to areas of growth and to encourage behavioural change. Work with travel planning organisations to ensure they understand integration with the bus and maximise the opportunities	Increased revenue through patronage growth	Close liaison between operators and Local Authorities through District Partners	None	To be identified	Clarification of engagement contacts to be an early win	Monitoring of patronage growth and revenue sales
	Financial model of the bus network	To understand the financial make-up of the bus network: to understand the public and private sector funding that makes up the bus network. To understand where opportunities can be maximised. Review the relationship between pain/gain and ensure sustainability of the tendered services.	Maximised patronage for funding available	Consultancy support	None	LTP	Longer term proposition	Increased number of public and private funding opportunities Sustained tendered services
	Funding and future aspirations	Identify alternative funding sources and understand future aspirations for the bus network	Maximised patronage for funding available	Operators and WYCA	None	To be identified	Longer term proposition	Increased number of alternative funding bids
	Supported services and Community Transport	Understand how small operators, supported services and community transport can	Improved customer offer	Operators and WYCA	Reducing tendered services budget	To be identified	Identification of routes could be an early deliverable,	WYCA Tracker survey and Transport Focus

Commitment	Output	Description	Outcome	How will it be Delivered?	Dependencies	Funding	Early Deliverable	Performance Management
		be better integrated to maximise linkages					requires a long term delivery plan	
	Propensity to use the Bus tool	Development of a propensity to use the bus tool so that a greater understanding of market and local factors can be incorporated into the planning and development of the bus network	Improved customer offer and increased patronage	WYCA to work with Urban Transport Group	Urban Transport Group Members or requirements of alternative research body	LTP	Medium term proposition	WYCA Tracker survey and Transport Focus
81	Data	<p>Extracting ticketer data to develop greater understanding of customer journeys, including alighting stops.</p> <p>Working with Ticketer to develop tools to maximise data usage across all operators. Deliver a pilot to test viability, for example mapping of diversion routes</p>	Improved customer offer	WYCA to develop data sharing agreement and work with operators	Ticketer ticket machines in place	Operator resources	Early deliverable for First bus routes - partial picture	WYCA Tracker survey and Transport Focus
		Data sharing agreement	Development of a data sharing agreement that provides all parties with a greater understanding of the customer journey allowing for targeted improvements to be made	Improved customer offer	WYCA to develop data sharing agreement	Ticketer ticket machines in place	Not required	An early deliverable if agreed as part of Voluntary Partnership Agreement
	Data format	Develop a standard data format across all data sharing, including timetables, patronage figures, fare tables.	Greater efficiencies	WYCA to work with operators	None	WYCA and operator resources	Early deliverable	Reduced time/resource spent collating data

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Appendix 2 –Voluntary Partnership Agreement Heads of Terms

The table below summarises the key contents of the Voluntary Partnership Agreement and the outcome for the signatory parties.

Key Item	Description	Outcome for Signatories
The Commitments	Items agreed to be delivered as part of the Alliance. The work stream delivery plans set out the work plans for the commitments.	Delivery of a number of outputs and outcomes that will work towards an improved outcome for the customer
Key performance indicators	The measure on which all parties will be assessed on the delivery of the VPA.	
Core Bus Network	Services that have a frequency of 15 minutes or better or service key destinations.	Agreement on the services that the Voluntary Partnership Agreement will primarily influence
Provision for an Advanced Quality Partnership Scheme	As specified in the Bus Services Act 2017. Any Party may propose through the Steering Group that an AQPS may be beneficial in supporting the achievement of the Alliance in a given location.	Specific outcomes in a geographical location that can influence the bus service operation within the area
Provision for a Local Voluntary Partnership Agreement	Districts may agree that an Advanced Quality Partnership Scheme should be supported by a local VPA. A local VPA may be appropriate where more significant commitments are proposed by either operators proposing to deliver to a higher standard than the core Advanced Quality Partnership Scheme, or in respect of wider delivery by the public sector of associated schemes which may support further investment by operators.	
Governance	The provision of a structure to manage the Alliance and performance against the targets and outcomes. Agreement on members of the Steering Group	Provision of a structure to oversee the Alliance and provide accountability
District Punctuality and Reliability Group	West Yorkshire District Officer Group that provides overview of the operational performance of the bus network and identifies where highway improvements should be prioritised	Ensure bus operational issues are prioritised in the Alliance and provides a forum for agreeing highway interventions that will prioritise the bus
Highway Improvements	Highway infrastructure schemes that will facilitate bus priority. Improve bus journey times enabling greater operational efficiency and generating customer benefits.	Ensures the bus is prioritised in funding opportunities and provides improved journey times for customers
Data Sharing Agreement	Agreement to share data that will enable management of the Alliance outcomes and ensure investment is targeted to improve outcomes for the customer	Improved customer offer

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Report to: Transport Committee

Date: 5 July 2019

Subject: **Presentation Of The Core Bus Network To Customers**

Director: Dave Pearson, Director of Transport Services

Author(s): Helen Ellerton

Is this a key decision?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	

1. Purpose of this report

- 1.1 To obtain Transport Committee’s advice on the principles being used to develop a simplified presentation of the core bus network.

2. Information

Background

- 2.1 Feedback obtained through the consultation undertaken as part of the development of the Bus Strategy and Leeds Transport Conversation highlighted that the bus network across West Yorkshire is difficult to navigate for infrequent bus users. Targets have been set to increase bus usage, it is therefore crucial to make the system easier to understand and use for people who don’t habitually take the bus.

- 2.2 Identifying bus services with the destinations they serve is a key element of this and a project us underway to provide a colour coded, map based wayfinding system which would be both available through digital and print media and visible on-street. Core Bus Network Visualisation is the working title for this project.

2.3 This project has been developed as part of the Connecting Leeds programme but will create a format which can be extended throughout West Yorkshire deliverable through the West Yorkshire Bus Alliance.

2.4 The aim of the network visualisation project is to:

- Present existing and potential bus users with a unified, accessible and easy to navigate network of the core bus services
- Promote usage of this bus network and contribute to the target of doubling bus patronage in Leeds and increasing by 25% over the region
- Ensure the destinations served by high frequency bus services are easily identify able to users and potential users through visual differentiation from other bus services

Core Bus Network

2.5 To aid simplicity of presentation, it is proposed that the presentation is limited to the “core bus network” in a similar way that mass transit systems are presented in other City Regions. The core bus network is defined as services with a frequency of 15 minutes or better or serve key destinations across the region. Appendix 1 contains a list of the core bus services.

Colour Coded Corridors

2.6 The system will be based around a map which identifies each corridor with a colour and a symbol these will highlight the key destinations on that corridor such as hospitals, universities etc. Initial principles of the designs will be made available at the committee meeting.

2.7 It is proposed that a series of maps are produced, which could enable a more detailed ‘segment’ map showing how the core bus network integrates with non “core” services, a dedicated Park & Ride map, a map for different times of day and a district/ locality focussed map.

Integration with On-Street Infrastructure

2.8 It is proposed to integrate the maps with the on-street infrastructure. The colours and symbols will be visible on bus stops and bus shelters. Appendix 2 provides an example of how the colours and symbols might be incorporated onto bus stops and shelters.

Coordination with the Buses across Operators

2.9 To further integrate legibility of the bus network it is proposed that the coordination of the colour and symbol will visible on the buses operating in the segment for example integrated into the bus destination blinds.

- 2.10 The Combined Authority is also working with the bus operators to obtain consistency on the place names used on the destination blinds to provide consistency, regardless of operator.

Consultation and Engagement

- 2.11 As part of Connecting Leeds, Leeds City Council hosted an Accessibility and Materials Day for the programme on 18 June where early feedback on the visual concepts and their usability was obtained.
- 2.12 A public engagement process for the draft Bus Information Strategy approved by the Committee in March 2019 which will be taking place over the summer 2019 period. The above principles will be incorporated into this consultation and reported back to Transport Committee in November when the final Bus Information Strategy will be considered for approval.
- 2.13 A finalised set of materials and a plan for their implementation will be presented for approval by the Transport Committee. The roll out on street will start in Leeds funded through the Connecting Leeds programme.

3. Financial Implications

- 3.1 The Connecting Leeds programme will fund the initial design works and the roll out on infrastructure in Leeds.

4. Legal Implications

- 4.1 There are no legal implications directly arising from this report.

5. Staffing Implications

- 5.1 There are no staffing implications directly arising from this report.

6. External Consultees

- 6.1 The proposals will be incorporated into the public engagement for Connecting Leeds and the Combined Authority's Bus Information Strategy.

7. Recommendations

- 7.1 That Transport Committee note and advise on the work to date in providing a simplified presentation of the core bus network.

8. Background Documents

None.

9. Appendices

None.

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Report to: Transport Committee

Date: 5 July 2018

Subject: **Transport Services Budget Update**

Director: Dave Pearson, Director, Transport Services

Author(s): Dave Pearson

Is this a key decision?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	

1. Purpose of this report

- 1.1 To update members of the Transport Committee on the performance of Transport Services in relation to the Combined Authority's budget strategy.

2. Information

- 2.1 The Combined Authority set the 2019/20 revenue budget and business plan at its meeting on 14 February 2019 on the basis of a £1 million pa reduction in the Transport Levy. To achieve this requires actions to be taken in respect of the delivery of revenue funded services provided by the Combined Authority using its powers as the statutory transport authority for the region.
- 2.2 A transformation programme is under way to ensure the transport services provided by the Combined Authority are both affordable within the reduced levy and are fully meeting changing customer expectations and the Combined Authority's inclusive growth agenda. The following sets out the position in each of the key activity areas.

Support for Mobility/ Tendered Bus Services – 2019/20 budget £16.7m

- 2.3 The medium term financial strategy adopted in January 2018 seeks to reduce this cost to £15.8m by 2020/21. This represents a 20% reduction in funding for mobility/ bus service support from 2017/18 levels. The Transport Committee adopted new policy guidelines in June 2018 which have been applied to a programme of review and re procurement of contracts for bus services together with a revision of the arrangements under which the Combined Authority provides home to school transport. This process is realising efficiencies and economies through a more rigorous approach to value for money, efficiency savings and smarter procurement which will enable the service to meet its budget for 2019/20. However, it is an appropriate time to consider what actions are needed in the coming year to meet the 2020/21 target.
- 2.4 It is therefore proposed that the Local Bus Working Group of Transport Committee members be convened to review progress to date against the savings target, to review the current guidelines and to consider options for further actions which will be presented to the Transport Committee later in the year.

Concessionary Fares – current budget £56.4 million

- 2.5 This funding enables the free travel scheme for older and disabled people (ENCTS) and reduced fares for younger people. The £45million pa spend on the ENCTS scheme is determined by legislation and calculated using a methodology set by Department for Transport. Whilst the Combined Authority has limited discretion in this area, agreements are made with the larger bus operators on the application of the metrics used in the methodology. The current three year agreements expire in 2020 and the process of re negotiating these agreement is under way. Changes to age eligibility thresholds are causing a small reduction in the volume of free journeys made which have allowed scope for minor reductions of spend in this area.
- 2.6 The £10 million currently spent on cheaper bus fares for under 19s is discretionary and closely supports the Authority's inclusive growth objectives. Negotiations are ongoing with bus operators to reduce the cost of travel for young people, increasing the number of journeys made at no additional cost to the local taxpayer. This will seek to obtain a higher return for the budget currently allocated.
- 2.7 The Combined Authority also funds the provision of half fare rail travel for ENCTS pass holders at a cost of £0.6 million, as these customers also have access to discounts through the national Railcard schemes, a review of the benefits of this concession is under way.

Provision of Travel Information – net cost £1.2million (£2 million offset by £0.8 million contribution from transport operators)

- 2.8 The Transport Committee have approved a draft Bus Information Strategy for wider public engagement over summer 2019. The final version will be considered by the Transport Committee in November 2019 and will set out a

process to improve the outcomes to customers at a lower cost to the local taxpayer.

Support To Multi Modal Ticketing – to be self-financing from 2019/20

- 2.9 The Combined Authority manages the sales and administration of the MCard scheme for which it receives a commission on value of sales. Arrangements are in place with West Yorkshire Ticketing Company Ltd to ensure the Combined Authority fully recovers its costs in supporting the MCard from 2019/20 onwards. The Combined Authority provides Travel Centres a number of its bus stations and plans to increase the self – service offer at these sites to reduce costs and improve efficiency. Projects are being developed to re model the Travel Centres to enable more customer self-service reducing the costs of operation.

Bus stations, stops, shelters and associated facilities –net cost £3.5 million-

- 2.10 53% of the cost of providing these facilities is offset by income from leasing retail units, advertising income and charges to bus operators. A programme of efficiencies and revenue generation has increased this proportion since 2016/17 including the introduction of charges for refurbished toilets and the provision of LED lighting. An Asset Management Plan is being developed to increase commercial income and realise further efficiencies to achieve 55% cost recovery from 2020/21.

3. Financial Implications

- 3.1 The objectives set out in the report are aimed at ensuring the cost of the transport services provided by the Combined Authority are in line with the revised Transport Levy.

4. Legal Implications

- 4.1 There are no legal implications directly arising from this report.

5. Staffing Implications

- 5.1 Whilst there are no staffing implications directly arising from this report, staff costs of the activities are within scope of the actions proposed.

6. External Consultees

- 6.1 No external consultations have been undertaken.

7. Recommendations

- 7.1 That Transport Committee notes the current progress towards meeting the 2019/20 revenue budget and medium term financial strategy as set out in this report.

7.2 That Transport Committee's Local Bus Working Group be convened to review options to amend the Committee's policy guidelines in respect of supported bus services prior to the Committee's consideration of such revisions later in 2019.

8. Background Documents

8.1 No background documents are provided to this report.

9. Appendices

9.1 None.



Report to: Transport Committee

Date: 5 July 2019

Subject: **Local Industrial Strategy**

Director: Alan Reiss, Director of Policy, Strategy and Communications

Author(s): Emma Longbottom

Is this a key decision?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	

1. Purpose of this report

- 1.1 To update the Transport Committee on progress to develop a Local Industrial Strategy (LIS)

2. Information

Background

- 2.1 In early 2018, the LEP Board and Combined Authority agreed that work would begin on the development of a LIS for Leeds City Region. Sitting at the heart of a new, long-term strategic policy framework, the emerging LIS will focus on bold steps aimed at boosting productivity and driving both inclusive and clean growth living for a post-2030 economy.
- 2.2 Guidance in the form of a policy prospectus on Local Industrial Strategies was published by Government in early October 2018¹. The guidance highlights that agreeing a LIS will be a necessary condition for LEPs and Mayoral Combined Authorities to draw down any future local growth funding (or Shared Prosperity

¹ <https://www.gov.uk/government/publications/local-industrial-strategies-policy-prospectus>

Funding) being deployed. The prospectus also states that Local Industrial Strategies should remain strategic documents and not contain any proposals that require new funding or have spending implications outside of existing budgets available to local areas.

- 2.3 The policy prospectus articulates that LISs should set out clearly defined objectives to increase the productivity of the local economy. So that all places:
- Are able to increase productivity and realise their potential, building on well-evidenced and distinctive strengths aligned to the national Industrial Strategy.
 - Set out spatial impacts of national and local policy across cities, towns and rural areas, informing priorities and choices and demonstrating how they will allow all communities to contribute to, and benefit from, economic prosperity. This is being seen as increasingly important due to the government's focus on areas that have been left behind.
- 2.4 Work is underway to identify key priorities against the five foundations of productivity – People, Place, Infrastructure, Ideas and Business Environment, which can be further developed and tested over the coming months to ensure that the LIS is reflective of all parts of the region.
- 2.5 In addition Government has set out four grand challenges – Clean Growth, Artificial Intelligence and Data, Future of Mobility and Ageing Society. LISs will demonstrate how and where areas can contribute to one or more of these global challenges by identifying nationally significant strengths, assets and opportunities.
- 2.6 The LIS is being co-produced with Government. Its ultimate endorsement by Government will mean it is a local expression of Government policy. This makes it a particularly powerful and influential strategy which will have an impact on future decisions about the region, for instance with regard to funding.
- 2.7 The [West Midlands](#) and [Greater Manchester](#) LIS's have been the first to be published. As trailblazers they have worked with government closely over the past year. The published documents offer an insight into the expectations of government. Officers from the LEP have previously discussed the process with colleagues from both West Midlands and Manchester and are talking to government to understand any lessons that can be learnt.
- 2.8 To date, the LEPs covering Leeds City Region and York and North Yorkshire have been working together to create a joint Local Industrial Strategy for their combined area. This is in the context of wider proposals to merge the two LEPs following Government recommendations that overlapping geographies between neighbouring LEPs need to be removed. Discussions around this merger are continuing with the aim of having a new LEP in place by March 2020, however more immediate decisions need to be taken on the LIS than the merger timescales allow. To simplify the decision-making process and to enable work to progress quickly, it has been agreed that each LEP will develop a separate LIS reflecting the two existing LEP geographies. There will continue to be significant

collaboration between the two LEPs on the development of these strategies, with a view to bringing the two together into a single, coherent strategy for the new LEP geography once the merger process is complete.

Process

- 2.9 Government guidance is clear on the need for LISs to be underpinned by robust evidence which draws out relative strengths and weaknesses, with an emphasis on productivity. A strong evidence base is already in existence and has been developed into a full economic analysis, which will support the development of policy priorities.
- 2.10 A broad range of stakeholders responded to an initial call for evidence to inform the development of the LIS evidence base. This included information regarding inclusive growth, construction skills, innovation and utilization of work place skills. A second, more focused call for evidence has been launched asking more specific questions and delving into the foundations of productivity.
- 2.11 Additional work is being undertaken where there is a gap in the existing knowledge base and a more intensive examination of the issues is required to address gaps in intelligence and determine areas of distinctiveness across the LEP area. External consultancy and support has been commissioned to develop more detailed evidence:
- *Productivity review*: greater analysis of productivity performance across the region, including analysis of sectors that have significant levels of low productivity firms.
 - *Understanding innovation in the region*: culture, capacity and potential for innovation across our business base.
 - *Health-tech/digital health audit* - seeks to better understand the nature of health-tech, particularly digital health, beyond the top line facts and figures, identifying genuine areas of distinctive strengths and opportunities across the region.
 - *Inclusive growth* – defining what inclusive growth means in the context of the LIS and working towards a set of indicators in the context.
 - *Clean growth audit* - identify the current clean growth sectors and develop new areas of opportunity.
- 2.12 The initial economic analysis, and associated commissions was completed in June. Further detailed work may follow. The final data report will be produced in summer 2019. Headline findings regarding the infrastructure section of the evidence will be provided verbally at the meeting.
- 2.13 Members are asked to provide feedback on some of the strengths, areas of distinctiveness and opportunities across the new geography, particularly relating to how transport can support productivity improvements.
- 2.14 An independent panel has been established to provide expert challenge and advice, and critical review of the evidence base and subsequent policy priorities. Members of the panel are drawn from academia, business, and the

voluntary and community sector. The panel met on 1 May and provided feedback regarding the process to develop the LIS. A further meeting is planned for July to consider the framework to shape the priorities for the Local Industrial Strategy and associated outcomes, along with the implications for policy development.

- 2.15 Consultation and engagement will also take place with LEP Board Panels, businesses, universities, local authorities and community and citizen groups to best understand their priorities and the role that the LEP can play in meeting these. This engagement has commenced, with a range of methodologies being explored including online consultation, social media, workshops and roundtables, and place-based community engagement events.
- 2.16 To reflect the scale and long-term ambition of the LIS, we will also engage with young people on their views and input into shaping our proposals.
- 2.17 The process to develop the LIS will be iterative and will therefore evolve throughout the year. Engagement and co-production with Government will be undertaken throughout the development process to ensure that the LIS is completed and submitted to Government in December 2019.

Key Milestones

- 2.18 Key milestones for the development of the LIS throughout 2019 are set out below:
- Initial call for evidence completed May
 - Initial economic evidence report completed June
 - Stakeholder engagement June/July
 - Second call for evidence June/July
 - Final economic evidence report complete August
 - Draft policy proposals August
 - Consultation and engagement on draft proposals September
 - LIS drafted and tested October/November
 - LIS finalised and submitted to Government December
 - LIS published March 2020

3. Financial Implications

- 3.1 In addition to core staff resource to support research and intelligence and policy development activity, a budget of approximately £200,000 is available from Combined Authority / LEP internal budgets across the financial years 2018-19 and 2019-20 (subject to business planning and budget setting) to support development of the evidence base for the Local Industrial Strategy. In addition, funding identified in the 'Strengthened Local Enterprise Partnerships' has been allocated and approved by Government.

4. Legal Implications

- 4.1 There are no legal implications directly arising from this report.

5. Staffing Implications

- 5.1 The LIS development forms a central component of the Combined Authority and LEP's programme of work to broaden its policy range. This will require capacity and expertise from the Combined Authority, local authorities and other partners. This can largely be provided within existing resources.

6. External Consultees

- 6.1 External engagement to inform the development of the Local Industrial Strategy has been commissioned to review productivity, innovation, health tech, clean growth and inclusive growth.

7. Recommendations

- 7.1 It is recommended that the Transport Committee notes progress made and that Members provide feedback on some of the areas of distinctiveness, assets and opportunities for the LIS, particularly relating to transport and productivity growth.

8. Background Documents

None.

9. Appendices

None.

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Report to: Transport Committee

Date: 5 July 2019

Subject: **Leeds City Region Transport Update**

Director: Dave Pearson, Director, Transport Services

Author(s): Various

Is this a key decision?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	

1. Purpose of this report

1.1 To provide the Transport Committee with an update on current issues.

2. Information

Bus issues

Bus Company Ownership

2.1 On 29 May, First Group PLC made an announcement to shareholders that it is “pursuing structural alternatives to separate our First Bus operations from the Group” as part of a process of re-structuring the company, A full transcript of the statement is included as **Appendix 1**. On 27 June, First announced the sale of its Bolton depot and operations to Rotala PLC. Members may also be aware that Deutsche Bahn has also indicated its intentions to dispose of its Arriva business in the UK.

2.2 The Chair has met with the Managing Director of First Group UK Bus Division seeking reassurance that the company remains committed to investing in growing bus patronage in the City Region. A dialogue is also opening with Arriva Yorkshire. A verbal update will be provided to the Committee.

Transport Select Committee Report –Health of the Bus Market

2.3 The House of Commons Transport Select Committee published the outcome of its review into the health of the bus market in May 2019. The full report can be found on the following link.

<https://publications.parliament.uk/pa/cm201719/cmselect/cmtrans/1425/report-overview.html>

2.4 The Committee calls on Government to bring forward a national bus strategy by the end of 2020 which, it recommends, should:

- Set out plans for making the full suite of operating models, including franchising and the ability to create new municipal bus companies, available equally to all local authorities with guidance on each;
- Describe a more stable multi-year funding model for local transport, including bus services, with clear strategy and details of bid-for funding;
- Assess the evidence for the effectiveness of bus priority measures and provide information on good practice;
- Set and track targets for modal shift and provide a framework to provide guidance for local authorities to encourage people to get out of their cars and onto buses.

Urban Transport Group –Factors Causing Patronage Decline

2.5 The Urban Transport Group has undertaken an appraisal of the existing evidence base on the range of factors that influence how people respond to the experience of bus travel, with a focus on the social-emotional experience of bus travel and on the experiences of different socio-demographic groups. • A number of international research studies have addressed bus users' attitudes, emotions, commitment and trust, but very little attempt has been made to understand these factors in relation to bus travel experiences in the UK.

2.6 Key findings of the review include:

- Different groups of people have different motivators, barriers and experiences of bus use with users generally being more positive and focussing on practical issues, and non-users generally more negative and focussing more on perceptions.
- Bus users experience a wide spectrum of emotional responses to bus use. These range from a sense of pride and trust in services which are reliable and good value for money, to anxiety and irritation whilst waiting for buses to arrive, or feeling unsafe whilst using a bus, travelling to and from bus stops, or waiting at bus stops.
- Women generally have more negative views (towards public transport) than men.

- The role of the driver emerges as a key factor with the potential to address some of the negative emotional responses to bus travel. Improved emotional satisfaction and connection with bus services could be achieved, for example, if drivers are constant on the same route at the same time; acknowledge passengers and provide eye contact; help with passenger queries; keep customers informed; and help customers onto buses, if needed.
- 2.7 The accompanying report detailing the work plans for the Bus Alliance demonstrate how these issues will be addressed in West Yorkshire

MCard Update

- 2.8 The MyDay ticket for under 19s was launched in summer 2018 and has been very popular with 35% year on year growth. Currently this ticket can only be bought from the bus driver however from July the product can be loaded onto a smart card either by using the MCard Android app or at a Travel Centre; sales at Payzone outlets will be available from September. Also in July the current range of paper DayRover tickets will be consolidated and rebranded into the DaySaver range. Work is now underway to provide a new MCard app available on Android and Apple devices later in 2019/20 using barcode technology which will enable these tickets to be purchased using mobile devices.

Strategic transport issues

West Yorkshire and York Car Club agreement extension

- 2.9 The West Yorkshire and York Car Club agreement, originally signed in February 2016 provides sets out a contract for car club vehicles to be provided across West Yorkshire and York in dedicated bays on street by Enterprise Car Club (formerly City Car Club). The agreement included provision for a two year extension at the end of the term, this option has now been exercised with the agreement of all parties. This extension to the contract covers the period May 2019-May 2011.

Rail Updates

West Yorkshire Rail Forum

- 2.10 The West Yorkshire Rail Forum met on 20 May 2019, with attendance from Northern, TransPennine Express, LNER, Network Rail and Passenger Focus. A number of issues were raised and discussed, including:
- Capacity – regularly deploying planned train strengthening as well as planning to demand, which remains a problem in West Yorkshire;
 - Infrastructure projects, such as, Leeds Station works;
 - Event Management;
 - Keeping the customer informed and mitigating passenger impacts from ongoing changes; and

- Raising public awareness of passenger compensation schemes.

2.11 The matter of introduction of new trains remains high on the agenda as a means of restoring lost peak-time capacity on TransPennine Express, and more reliably increasing the capacity of peak time trains on Northern, as well as allowing for the release of Pacer trains. LNER was able to note the successful introduction of its new Azuma trains on 15 May. Northern expects to start introducing new diesel and electric trains from 1 July 2019. TransPennine Express expects to launch new trains over the summer. Updates on new trains have been provided by Northern and TransPennine Express. These are included at **Appendix 2**.

Performance update

2.12 Rail timetables changed on Sunday, 19 May 2019. A handful of service changes occurred, as previously reported (see **Background Documents**). These changes have been accommodated without notable additional disruption.

2.13 A summary of performance is provided at **Appendix 3**. Whilst performance has recovered overall since last summer, it has still not returned to historic levels. This is, to a degree, a national problem as the network is becoming more congested. For a similar reason, the impact of specific events impacting on the railway are now less easy to recover from.

2.14 The matter of short formations in peak hours remains an issue on Northern, as discussed at the Rail Forum and as part of regular dialogue with the operator.

Rail reviews

2.15 The Combined Authority's response to the Williams Rail Review second call for evidence was submitted at the end of April 2019 following agreement of members of the Combined Authority and Transport Committee. This was due to be endorsed by Combined Authority on 27 June 2019, and is included at **Appendix 4**. Building on the first response, the second response focuses on what is required from a future model for the railway, including:

- **clarity of objectives** for the railway: social, economic, and environmental and permeating the railway from top to bottom;
- **network outputs** driven by these objectives (without conflicting incentives);
- **value for money** in day-to-day operation and in delivery of new infrastructure;
- a coordinated and integrated rail system with **a 'controlling mind'** with clear lines for influence and accountability;
- a railway **operationally independent of government** (but accountable to it nationally and regionally), with a focus on investing in skills and research; and
- **devolution** to ensure that objectives reflect local priorities and conditions, with accountability to those most affected by the railway.

- 2.16 The introduction of the May 2018 rail timetable changes in the North led to severe disruption for passengers and businesses. Cllr Blake on behalf of TfN and, the Minister for Rail at the Department for Transport (DfT) undertook a joint review into the issues, “The Rail North Partnership Review”, known as the Blake Jones Review.
- 2.17 The Blake Jones Review was due to be published shortly, and is anticipated to identify four key areas of change:
- A focus on passengers
 - Improved accountability
 - Better communications and greater transparency
 - Improved trust and responsiveness
- 2.18 The findings are already impacting on a different approach to the TfN Rail North arrangements, and are shaping TfN’s approach to rail devolution proposals for the north, including through the Williams Review process.
- 2.19 Richard George’s commission for DfT working with TfN and the rail industry in the north of England has now concluded (see **Background Documents**). Richard was due to meet with members of the Combined Authority at the end of June, and his final report is expected to be published imminently subject to sign-off from DfT.

HS2 Phase 2b design refinement consultation

- 2.20 The Secretary of State for Transport is consulting on 11 proposed design refinements to the HS2 Phase 2b route. This design refinement consultation (DRC) is a key milestone on the path leading up to hybrid bill deposit. The proposals were published on 6 June 2019, and the consultation runs until 6 September 2019. This consultation comes at a time when there is the prospect of a review of the HS2 programme following the selection of a new Prime Minister.
- 2.21 The proposed changes to the HS2 route are intended to make it more efficient, cost effective and to minimise disruption for residents and impacts on the environment. The consultation also includes proposals for infrastructure that would allow Northern Powerhouse Rail (NPR) trains to use the HS2 route into Manchester and this marks the first step towards fully integrating HS2 and NPR.
- 2.22 The element that is specific to this region is around the Leeds corridor between Woodlesford and Leeds. The Combined Authority is working closely with the relevant district partner and stakeholders to assess the implications of the proposed alteration. Also notable for its absence is the proposed new rail infrastructure at Stourton and Garforth to better integrate HS2 and NPR on the eastern leg of HS2.
- 2.23 The Combined Authority will develop a response to these design changes in consultation with members for submission by the deadline.

Programme Updates

Bus Hotspots 2017/19 programme

- 2.24 The Bus Hotspots programme, funded through the National Productivity Investment Fund and the Local Transport Plan, is aimed at easing congestion at known bus hotspots in the Leeds city region thereby improving punctuality and reliability, reducing customer complaints and improving customer perception of bus services, and increasing patronage thereby reducing the reliance on the car for many journeys.
- 2.25 Transport Committee is requested to endorse a change request for Bus Hotspots for an extension to the programme completion date from April 2019 to January 2020 to allow for resource constraints and ongoing Environment Agency work, and a reduction in scheme costs from £959,000 to £811,000 due to changes in scheme scope.

Smart Card and Information Programme (CHASE)

- 2.26 CHASE project, funded through the Local Transport Plan, sits under the umbrella of the Smartcard and Information (SCIP) programme, which aims to deliver improvements to the customer experience and organisational processes for ticketing, payments and information. The CHASE project focuses on the provision of a customer facing service for ordering passes and smartcards and its supporting database.
- 2.27 Transport Committee is requested to endorse a change request for the Smartcard and Information Programme and CHASE scheme within the Programme for a revision of the project completion date from September 2019 and August 2019 respectively, to January 2020 which takes it beyond the approved tolerance for project completion. The delay arises due to a temporary suspension of the final stage of software development to allow for works to stabilise and improve the system's performance.

Consultations

Aviation 2050 Green Paper consultation

- 2.28 The government has been consulting on their Aviation 2050 green paper 'The future of UK aviation'. The Green Paper sets out a long term aviation strategy with a particular focus on developing a globally connected Britain. The consultation had a closing date of 20 June 2019. The documentation can be found here: <https://www.gov.uk/government/consultations/aviation-2050-the-future-of-uk-aviation>. Much of the Green Paper focussed on aviation industry interests and financial and regulatory issues and proposed policy responses, but it did include policy proposals pertinent to the Combined Authority and partner councils in respect of:
- Strengthening economic performance through improved aviation connectivity;
 - Balancing aviation growth with environmental considerations.

2.29 The Green Paper develops the government's discussion of Aviation Strategy that commenced with their publication of a Draft Airports National Policy Statement in 2017. Transport Committee developed and endorsed the response of the Combined Authority to the 2017 consultation, and was invited to comment on a draft response to this latest 2019 consultation. The Combined Authority took the opportunity with this latest consultation to restate interests in respect of establishing new global connections from Leeds Bradford Airport (LBA), improving surface access to LBA, Manchester and other airports particularly through short and long term improvements to rail services, and seeking to balance growth in air travel with environmental considerations that are consistent with the 'Climate Emergencies' recently declared by West Yorkshire partner councils.

3. Financial Implications

3.1 There are no financial implications directly arising from this report.

4. Legal Implications

4.1 There are no legal implications directly arising from this report.

5. Staffing Implications

5.1 There are no staffing implications directly arising from this report.

6. External Consultees

6.1 No external consultations have been undertaken.

7. Recommendations

7.1 That the updates provided in this report are noted.

7.2 That Transport Committee approves the amendments to the Bus Hotspots and Smartcard and Information Programmes as detailed in this report

8. Background Documents

8.1 Summary of May 2019 timetable changes, and summary of Richard George commission and main findings. Included in **Item 11** – West Yorkshire Transport Committee, 15 March 2019. Available via:
<http://westyorkshire.moderngov.co.uk>

9. Appendices

Appendix 1 First Group Strategy Statement

Appendix 2 New Train Updates

Appendix 3 Rail Performance Summary Graphs

Appendix 4 Williams Rail Review: Second Call for Evidence – Objectives and Assessment Criteria - Submission of the West Yorkshire Combined Authority

Item 11 - Appendix 1 – Transcript to First Group Statement Dated 29 May 2019

FIRSTGROUP PLC

STRATEGY UPDATE

- FirstGroup today announces plans to rationalise our portfolio with the Group's future emphasis on First Student and First Transit, our core North American contracting businesses, which have the greatest potential to generate sustainable value and growth over time
- Accordingly, a process to sell Greyhound has commenced and we are pursuing structural alternatives to separate our First Bus operations from the Group
- We have an existing portfolio of rail franchises in the UK which we will operate in accordance with their terms
- We will secure best value for shareholders by executing these plans with pace, having regard for the regulatory procedures and stakeholder consultations, including pensions, that will be required

Portfolio rationalisation plans

FirstGroup has a portfolio of five market leading public transportation businesses in the UK and North America. The Board regularly reviews all appropriate means to mobilise the considerable value inherent in the Group, recognising that there are certain constraints and friction costs to overcome in the case of some potential options, and will continue to do so. In light of the performance improvements we have achieved through our divisional strategies, and the changes in the wider environment, we believe that the most appropriate means to deliver enhanced sustainable value is through the rationalisation of the portfolio being announced today.

Our North American contract businesses

In future our core market will be North America, and centred on First Student and First Transit, our market leading contract-based businesses, which together generated 60% of the Group's operating profits in 2019. They share increasingly similar attributes and opportunities to grow and create value, and between them we have established a strong and profitable platform in North American mobility services.

We have improved First Student's margins substantially to 9.5% in 2019 through a combination of our rigorous returns-based contract bidding strategy and sustained cost and process efficiencies. We are confident that our largest business is now restored to a position of generating sustainable growth, cash and returns from its multi-year contract portfolio, which remains by far the largest in the North American home-to-school bus market. Looking ahead, First Student is targeting development of complementary transportation and mobility technologies and services, entry into adjacent markets as well as organic and M&A-led growth in the home-to-school market.

First Transit has delivered long term growth as North American transit markets continue to outsource, and has built a diversified transit management contract portfolio that generates attractive returns and cash flow given the relatively modest capital requirements. We are targeting further long term growth from First Transit's core markets, particularly in shuttle and in vehicle services, and have already established our credentials in a number of attractive adjacent markets – such as commuter rail and bus rapid transit (BRT). First Transit is at the front end of the Group in capturing opportunities in Mobility as a Service (MaaS) and Shared Autonomous Vehicles (SAV). Our business is in a strong position to generate value as transit management markets continue to evolve, as we leverage our partnerships with ridesharing and other Transportation Network Companies to remain at the forefront of innovation.

First Student and First Transit are increasingly overlapping in terms of the technologies and management skillsets required to thrive in response to the market opportunities in front of them. As we drive our core contracting businesses forward we will ensure that our management and functional structures are positioned to capitalise further on the platform we have built in the emerging North American mobility services market.

Separation plans

First Bus is one of the largest operators in the UK with a fifth of the market outside of London. We have improved our offering by investing in our fleet and transforming our networks, payments systems and passenger information services to improve simplicity and convenience for customers. We have significantly improved cost efficiency in the division, through investment in operations and maintenance systems and by rationalising our footprint via network changes, depot sales and closures. As a result, First Bus margins have improved to 7.5% in 2019 and it is now on a much stronger footing as a business. First Bus has limited synergies with our other operations and, having set the business on the path to increased profitability, we believe now is the right time to pursue structural alternatives to continue this progression and deliver value to shareholders while managing the division's longer term liabilities.

Greyhound is the only operator of scheduled intercity coaches in North America, with a unique nationwide network and an iconic brand. We have invested in Greyhound to implement airline-style yield management and real-time pricing, up-to-date booking and ticketing options and improved customer communications channels. We have also reduced Greyhound's footprint in Western Canada and continue to release value by optimising its property portfolio. Greyhound has limited synergies with our other, predominantly contract-based, North American businesses and we believe that value for shareholders can best be delivered by seeking new owners that will further support the continued development of this business. As such a formal sale process for Greyhound is underway.

As part of our portfolio rationalisation plans to separate Greyhound and First Bus from the Group, we will evaluate our capital structure and capital allocation policy as

we move forwards, to ensure it is optimal for supporting future growth and shareholder returns while still maintaining an appropriate balance sheet.

First Rail

We have a portfolio of separately managed rail franchise businesses in the UK which we will operate in accordance with their contractual terms. First Rail's goal remains to add value through our operational expertise and strong industry relationships. Our UK rail franchise portfolio has generated £330.9m in adjusted profit with net cash and dividends to the Group over the last five years. However, given our reduced expectations for our two most recently awarded franchises, we have concerns with the current balance of risk and reward being offered. We await the outcome of the UK government's review into the structure of the whole rail industry chaired by Keith Williams as it seeks to address these and other industry issues. Any future commitments to UK rail will need to have an appropriate balance of potential risks and rewards for our shareholders.

Commenting, Chief Executive Matthew Gregory said:

"Since becoming Chief Executive in November 2018, I have been focused on setting the Group on a clear path to enhance value. By executing the portfolio rationalisation plans we are announcing today, our future emphasis will be on First Student and First Transit, our core contracting businesses in North America. We see significant potential to generate long term, sustainable value and growth from the solid platforms these businesses provide in the North American mobility services sector. We are intent on executing this strategy at pace, having full regard to the regulatory and stakeholder procedures and approvals that will be required.

"In parallel with our portfolio rationalisation plans we will continue to drive forward the clear strategies now established in each of our divisions to ensure they deliver further progress and growth in existing and adjacent markets, underpinned by our plans to enhance our cost base further.

"Our plans will create a more focused portfolio, with leading positions in our core North American contracting markets, and is the most appropriate means for us to deliver enhanced sustainable value for all our stakeholders."

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Item 11 Appendix 2

New Trains Update

1. Updates on new trains from Northern and TransPennine Express

The following information was provided by Northern and TransPennine Express respectively during week commencing 3 June 2019. The text at parts 2 and 3 is that provided by the train operating companies.

2. Northern Update on New Rolling Stock Introduction

Arriva Rail North (ARN) intends to start operating the first of our new trains from the 1st July. These will initially operate through Cumbria, Lancashire, Greater Manchester & West Yorkshire and South Yorkshire.

This initial tranche represents nine in passenger service, with a further ten units supporting crew and maintenance staff training against our initial order of ninety-eight. This is comprised of 12 x 4-car electric multiple units (EMU), 25 x 2-car diesel multiple units (DMU) and 61 3-car DMU / EMU sets. (A further 3 x 3-car DMU order will follow on)

There are currently thirty-four new units in the country; the balance of which are going through either pre-acceptance compliance testing by manufacturers CAF and our engineers across our network or being initially assembled into units and tested at the Edge Hill facility in Liverpool.

In order to ensure customers benefit from improved rolling stock as quickly as possible, we will continue to introduce our new fleet in the coming months as they become available after acceptance, by 'dropping-in' further tranches of units outside main timetable change dates as crew training and vehicle testing progresses.

At this time, we are projecting that by the end of the year almost 70% of our original order will be in service, but we are of course striving to better that. Whilst we are disappointed this is not as expansive a deployment as initially envisaged, we are confident that the majority of customers will be benefitting from new and modernised trains with our programme for internal and external vehicle refresh around 80% complete by this stage.

The delay in full new train rollout is primarily due to the manufacturing process and we have been actively working with CAF since early 2017 to investigate and exploit opportunities to accelerate the build and recover lost production to support delivery and commissioning plans.

Mitigations that were introduced included a second production line in Northern Spain and a further manufacturing line in Newport, South Wales. Whilst these were in a large part successful, the publicised coupler problems at the start of 2019 had a regrettable further adverse impact on train delivery and testing.

This does mean that introducing all the stock by the end of this year is now an increasingly compressed activity and introduces practical challenges in completing

the testing & acceptance of the remaining trains; in addition to training over 3000 colleagues who will crew and maintain them.

However, our December timetable (which is not dependant on any significant infrastructure upgrades) will offer customers further increased services and more journey opportunities.

We will continue to work with partners to plan how best we can utilise our available fleet and continue to explore any short-term options that may come available to supplement our fleet from outside of Northern.

3. TransPennine Express new train fleet

Over the coming months TransPennine Express will introduce 220 new carriages into its fleet, and investment of more than £500m providing additional seats and capacity across its network.

Three fleets of five carriage trains are being introduced: Nova 3 which will operate between Liverpool Lime Street and Scarborough as well as between Manchester Airport to Middlesbrough; Nova 2 which will operate on the West Coast Main Line between Manchester Airport and Glasgow/Edinburgh as well as between Liverpool Lime Street and Glasgow; and Nova 1 which will operate on the East Coast Main Line between Edinburgh/Newcastle and Liverpool Lime Street/Manchester Airport via Leeds and Manchester.

As new trains enter into service existing trains (Class 185s) will increasingly operate as six carriage trains, doubling seats provided on core corridors including Cleethorpes/Sheffield to Manchester Airport and Manchester Piccadilly to Hull.

Nova 3:

13 five carriage Nova 3 trains hauled by class 68 locomotives will be introduced for customer service this year. Each train will have 291 seats (261 in standard and 30 in first class) which is 110 more seats than a class 185 train. All of these trains have now been built by Construcciones y Auxiliar de Ferrocarriles (CAF) and two of these trains have been accepted by TransPennine Express following the completion of a comprehensive approvals process, with more scheduled for acceptance in the next few weeks. As previously advised deliveries of these trains to TransPennine Express has been delayed as a consequence of technical issues which the manufacturer has been working to resolve.

Based on the progress made, the first Nova 3 trains are now expected to start entering customer service on an initial basis during this summer, with a progressive roll-out of the remainder of the fleet planned over the rest of the year.

Nova 2:

12 five carriage Nova 2 electric trains will be introduced for customer service this year. Each train will have 286 seats (264 in standard and 22 in first class) which is 84 more than a class 350 train. All of these trains have now been built by Construcciones y Auxiliar de Ferrocarriles (CAF) and there are three of these trains in the UK for the comprehensive approvals process. This process is expected to

be concluded this summer, when the first trains will be delivered to TransPennine Express for staff training with introduction into customer service expected to take place this autumn.

Nova 1:

19 five carriage Nova 1 bi-mode trains will be introduced for customer service this year. Each train will have 342 seats (318 in standard and 24 in first class) which is 161 more than a class 185 train. Construction is largely complete by Hitachi Rail Europe and there are six of these trains in the UK for the comprehensive approvals process. This process is expected to be concluded this month, when the first trains will be delivered to TransPennine Express for staff training with introduction into customer service expected to take place starting in the autumn between Liverpool Lime Street, Manchester and Newcastle, extending to Edinburgh Waverley at the December 2019 timetable change.

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Item 11 Appendix 3

Rail Performance Summary Graphs

The graphs below provide a summary of performance by rail reporting in a way that allows performance to be compared with previous years. The Cancelled and Significantly Late (CaSL) and Short Formed figures are for 2018 onwards only.

Rail Period Dates

The rail industry reports performance and other data on the basis of a 13-period year. This year and last the rail periods are as follows:

Rail period	2018 / 19	2019 / 20
Period 1	1 April – 28 April	1 April – 27 April
Period 2	29 April – 26 May	28 April – 25 May
Period 3	27 May – 23 June	26 May – 22 June
Period 4	24 June – 21 July	23 June – 20 July
Period 5	22 July – 18 August	21 July – 17 August
Period 6	19 August – 15 September	18 August – 14 September
Period 7	16 September – 13 October	15 September – 12 October
Period 8	14 October – 10 November	13 October – 9 November
Period 9	11 November – 8 December	10 November – 7 December
Period 10	9 December – 5 January	8 December – 4 January
Period 11	6 January – 2 February	5 January – 1 February
Period 12	3 February – 2 March	2 February – 29 February
Period 13	3 March – 31 March	1 March – 31 March

Performance Terms

The Public Performance Measure (PPM) combines figures for punctuality and reliability into a single performance figure. For TransPennine Express it covers services arriving at their destination within 10 minutes of their planned arrival time and for Northern within 5 minutes of their planned arrival time.

Cancellations and Significant Lateness (CaSL) – the percentage of trains which are part or fully cancelled or arrive at their destination more than thirty minutes later than planned.

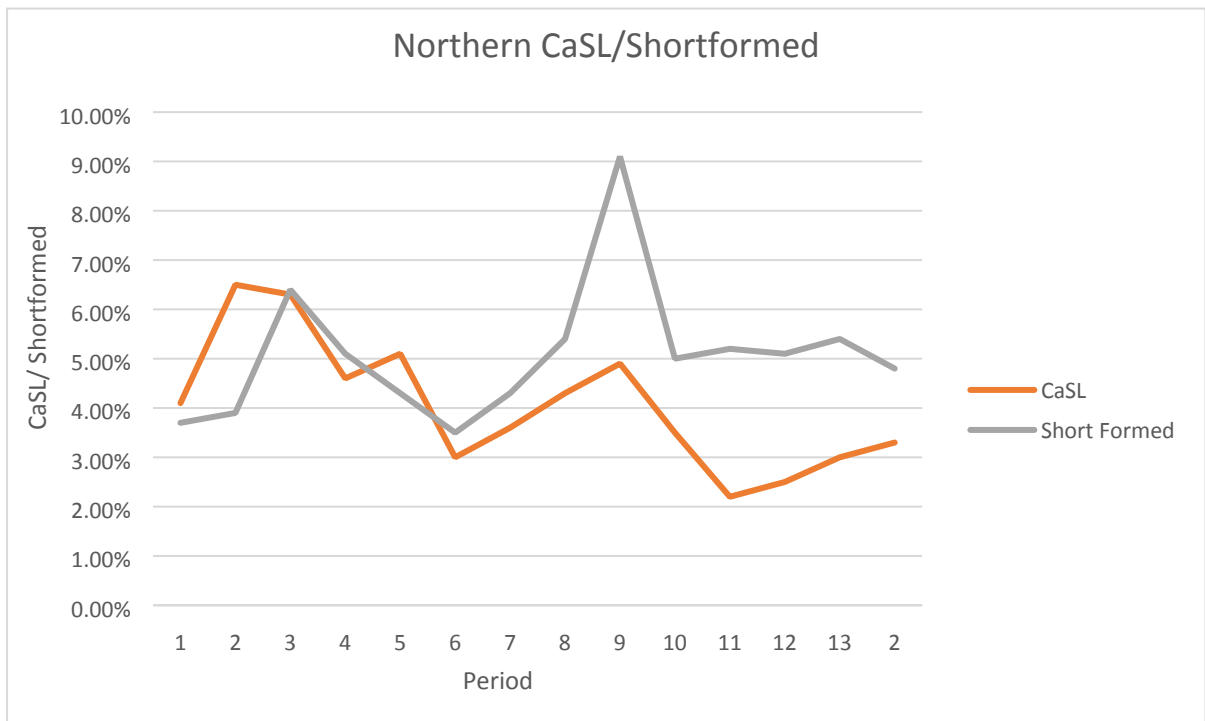
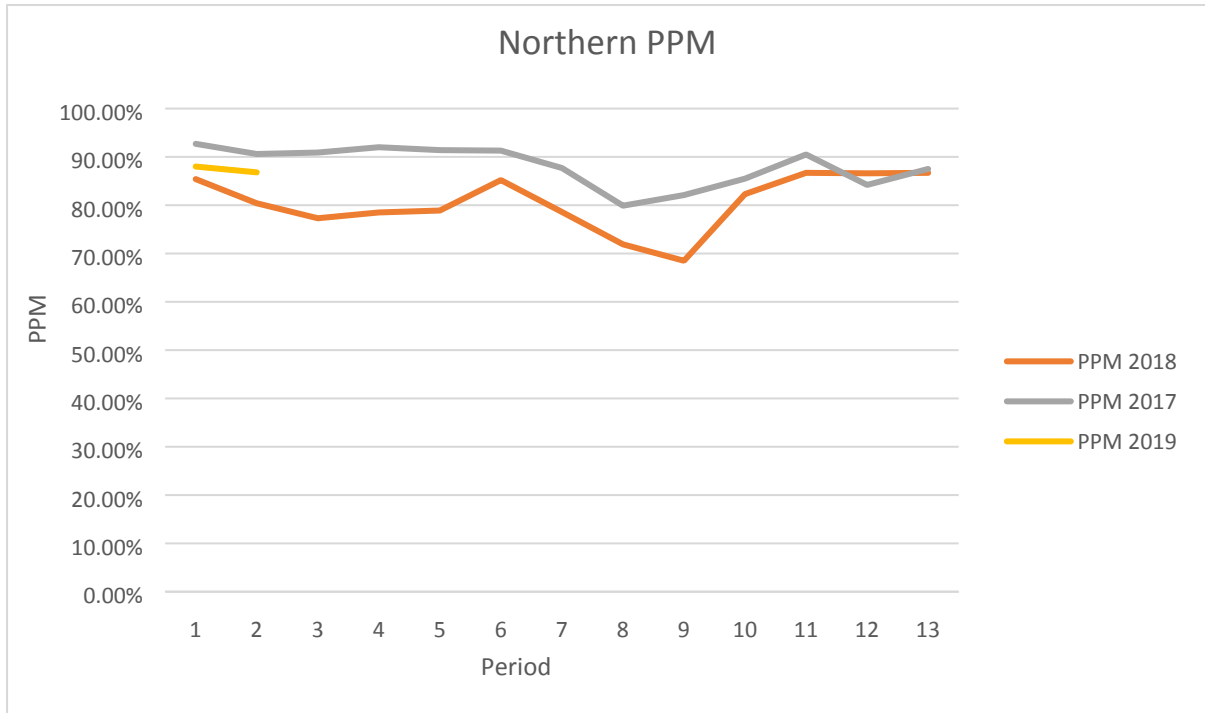
Short Formed – the percentage of trains which run with less than the planned capacity.

Northern

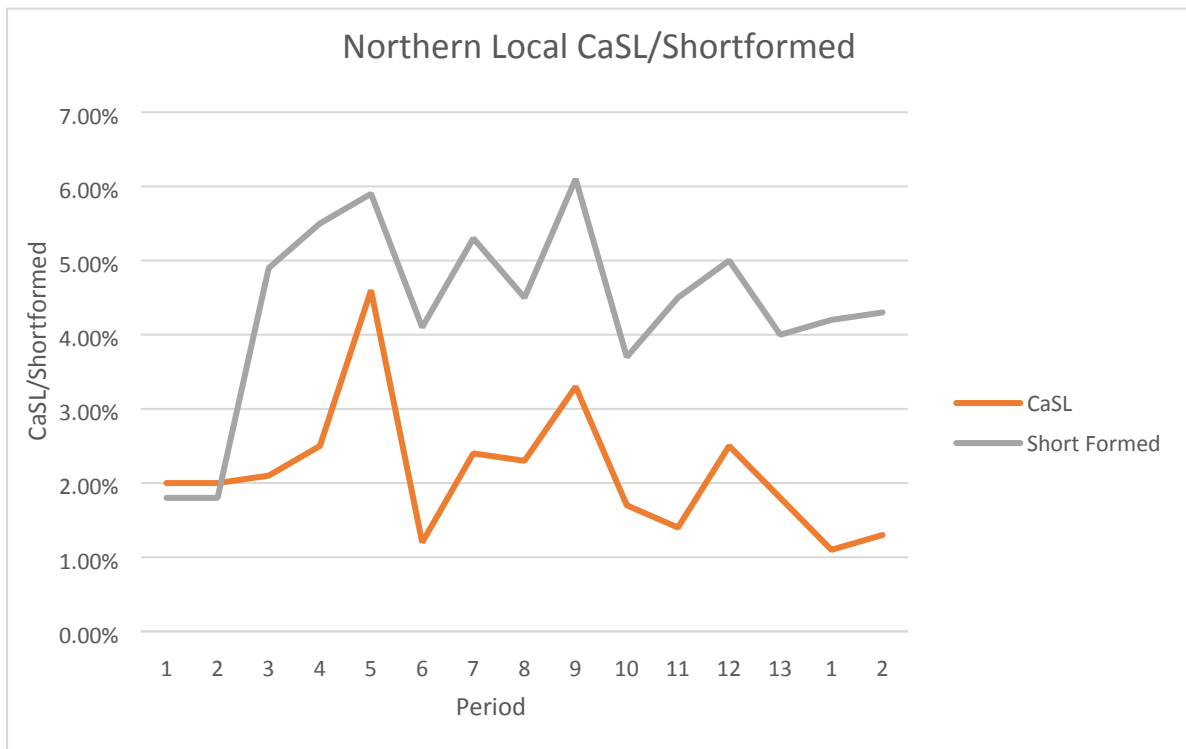
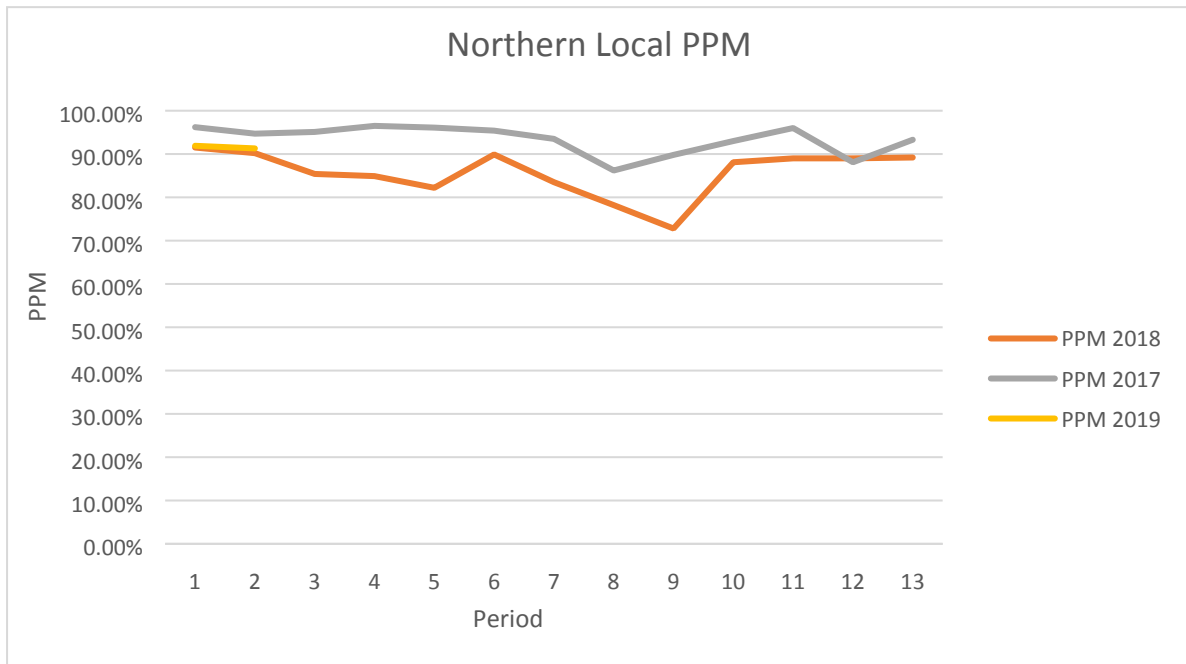
Target PPM: 86.5% (Period 2)

Target CaSL: 1.7% (Period 13)

Northern – All services across franchise



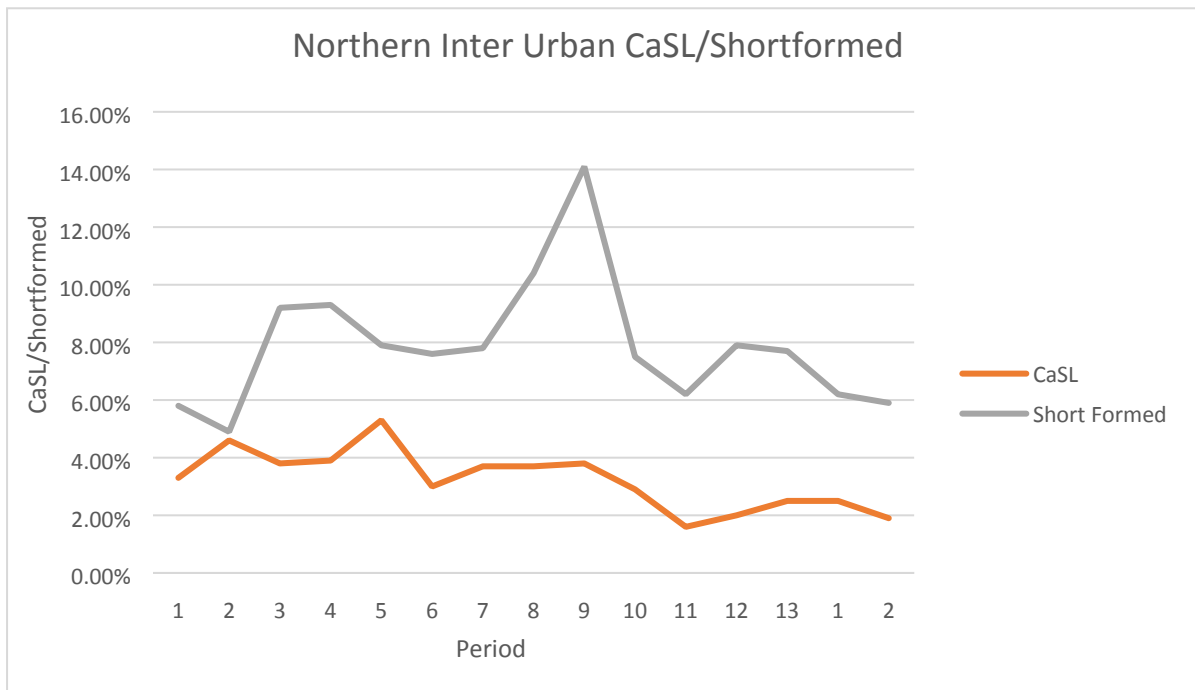
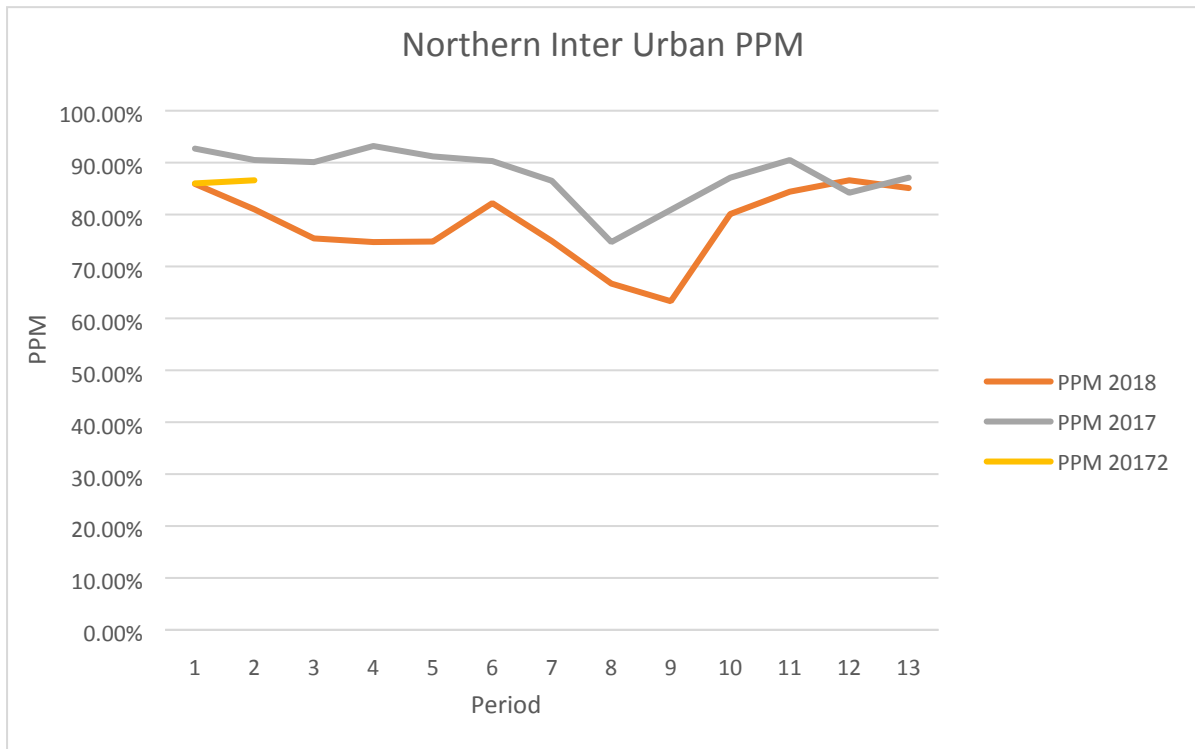
Northern – West and North Yorkshire – Local



Local

- Wakefield line route to Sheffield
- Airedale line – shorter routes
- Wharfedale line routes
- Pontefract line routes
- Southport-Leeds Calder Valley route

Northern – West and North Yorkshire – Inter Urban



Inter Urban

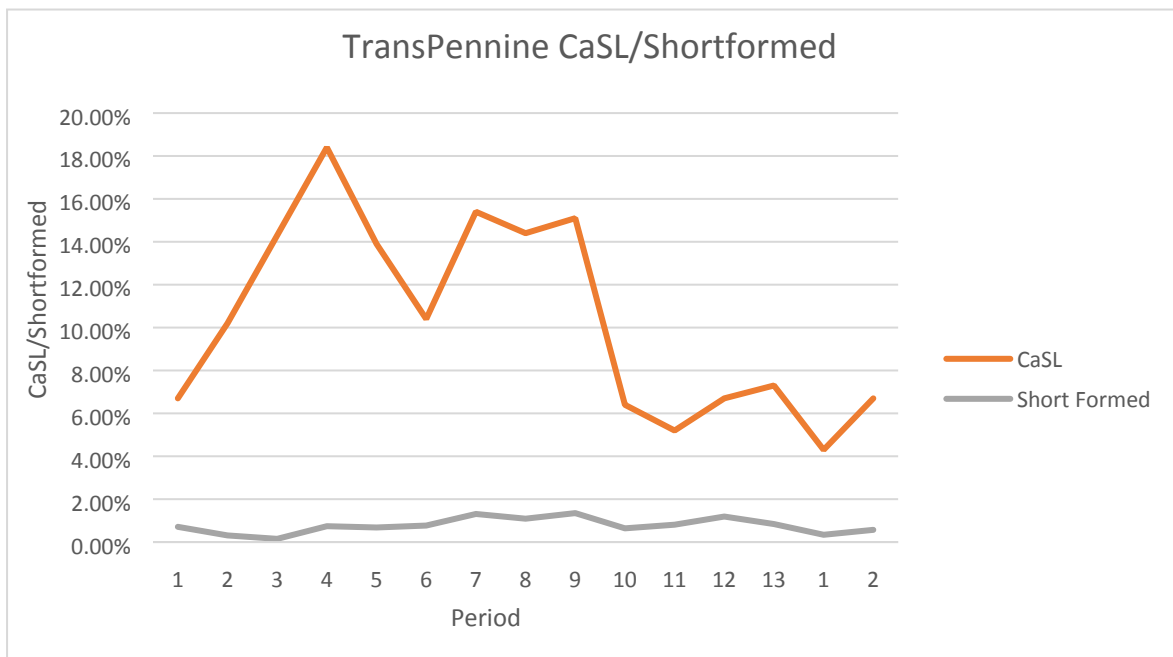
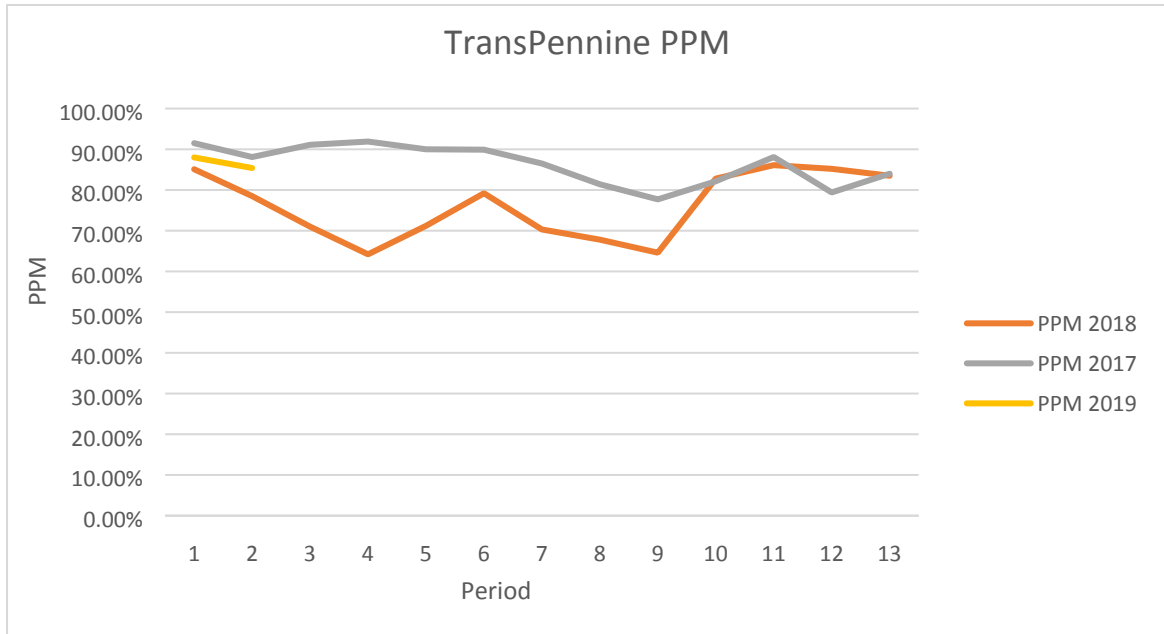
- All Calder Valley routes (except Southport-Leeds)
- Harrogate line routes
- York and Selby line routes
- Longer distance Airedale line routes
- Huddersfield line routes
- Wakefield line route to Doncaster

TransPennine Express

Target PPM: 87.7% (Period 2)

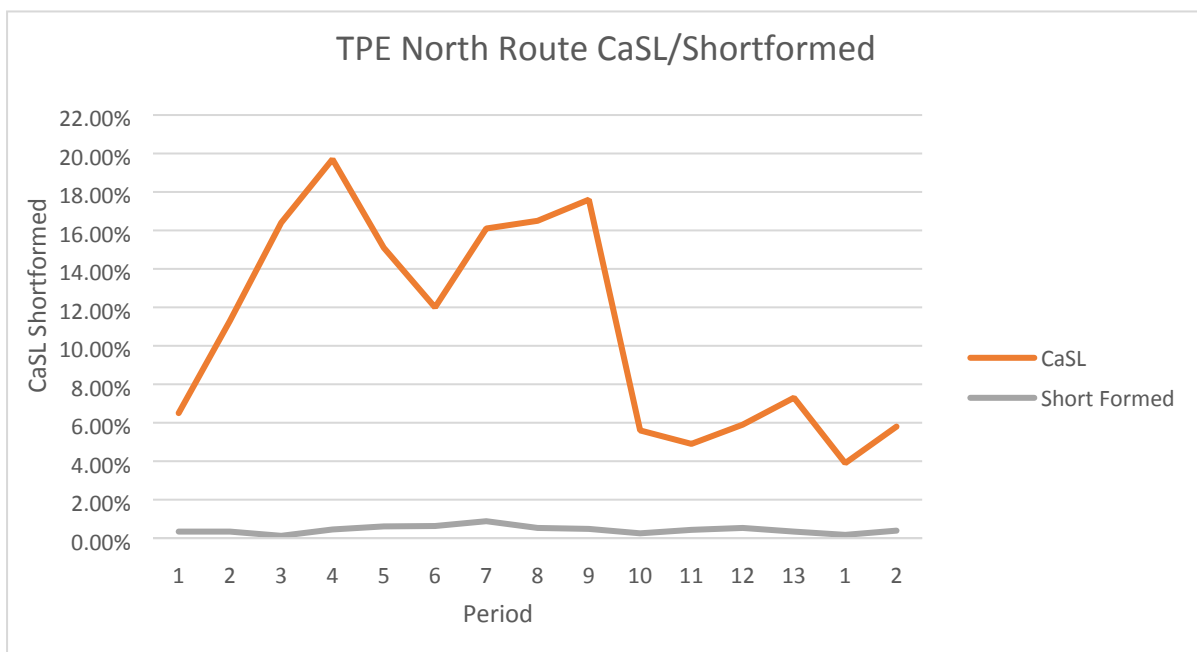
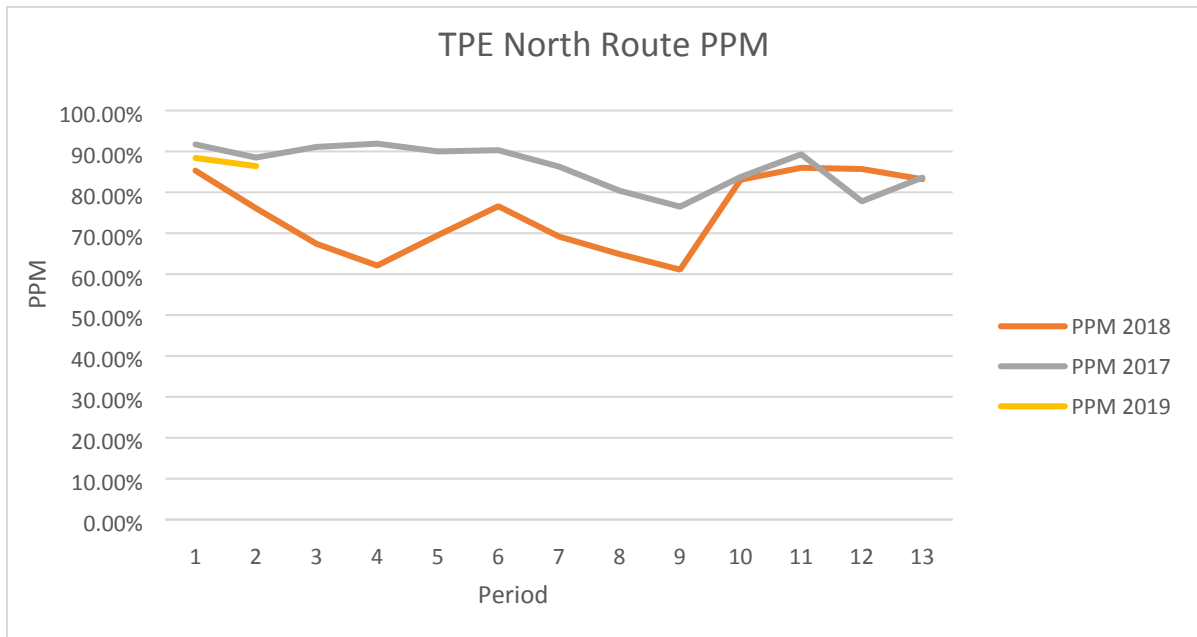
Target CaSL: 3.6% (Period 13)

TransPennine Express – All Routes



TransPennine Express – North Route

(Liverpool/Manchester/Manchester Airport to Hull, York, Scarborough, Middlesbrough and Newcastle).



Williams Rail Review: Second Call for Evidence – Objectives and Assessment Criteria - Submission of the West Yorkshire Combined Authority**Executive Summary**

The railway needs to have clear ultimate objectives in terms of *why* it exists, expressed in terms of social, economic and environmental policy; the specific outcomes for it to achieve through its operations should flow from those. Success in these terms will be associated with passenger and freight customer satisfaction, but it is essential also to consider non-users and low-users if modal shift and sustainable, socially-inclusive mobility are to be achieved.

The network can and must achieve far better value for money in both its day-to-day operations and the delivery of enhancements; its affordability should be considered against such value for money and its success in delivering against its ultimate objectives and the network outcomes set. Simply requiring passengers and/or freight customers to bear an ever-higher proportion of a costs base that remains at current levels is, against those objectives, no answer. Decisions on railway investment must reflect the underlying differences between the regions served, and historic disparities between investment levels around the country – while bearing a strong presumption in favour of “investing to save”.

The railway needs to become a coordinated and integrated system with a “controlling mind” and shared objectives as set out in the proposed Summary Problem Statement. Investment must be directed towards these objectives.

Devolution is critical to enabling those objectives to be set (and strategies developed) by reference to real-world conditions including land-use policies and local priorities, and is the only way to ensure accountability to those most affected by the planning, decision-making and day-to-day management of the railway. Nor is such devolution in conflict with industry models that promote integration and efficiency. There is strong evidence from international and historic practice that devolution of decision-making, backed up by genuine accountability, is a feature of railways that are successful in meeting their ultimate social, economic and environmental objectives. Evidence also suggests that a railway based on integration and cooperation has potential to be associated with efficiency, with clear, shared objectives, and with better outcomes for the rail user.

The assessment criteria for any new railway industry structure should reflect the priorities of accountability and value for money, alongside delivery of a service quality which retains existing users and enables rail to expand its modal shares and attract new users to the network – and need to flow from the problem statement.

As rail is always a part of a journey (be it of a passenger or of a freight commodity) from an origin to a destination, metrics for performance and cost-effectiveness should be designed around these perspectives, with, for example, punctuality measured around real-world passenger journeys from true origin to true destination.

Success criteria must reflect the ability of the industry to play its role alongside partners in all tiers of government, industry and communities by being reactive to their needs and easy to work with, whilst having its own focused, technically able, and innovative management, and investing in skills for the long-term benefit of the railway and economy.

The principal points from our earlier submission still stand – the full document is appended:

- *The chaos unleashed on passengers and the economy since May 2018 confirms that the current UK organisational and commercial railway frameworks are not working for our region.*
- *The railway should be much more focussed on delivering the service that passengers and freight customers want and need.*
- *Form should follow function - the railway should not exist in a bubble, and requires urgent reform so that it provides the mobility that our society needs, equally well across the country.*
- *The North of England needs a railway structure that supports the ‘Northern Powerhouse’ programme of regeneration, rebalancing and productivity growth through investment, which should primarily be about providing a service to customers and society, with profit being a second order priority.*
- *The railway network is a system. We need a railway framework with aligned objectives, structures and organisational/commercial models.*
- *Rail franchising is not working for our region.*
- *The railway needs to be totally accountable to democratically elected government at national and sub-national levels for rail outcomes.*
- *The railway needs to be open for business.*

Introduction

This submission is made in response to the Call For Evidence made in March 2019, under the heading “Objectives and assessment criteria”. It is further to our first submission, dated 18 January 2019, made in response to the previous Call For Evidence: the two are intended to complement one another so should be read in conjunction.

That previous response (specifically *Section 2. Introduction*) set out the role and overriding focus of the West Yorkshire Combined Authority (“the Combined Authority”).

We would add also that the Combined Authority has been working, and continues to work, closely with our colleagues in Transport for the North and the Urban Transport Group, and their submissions are expected to mirror many of the points we make in this document.

The remainder of this document is set out in the order of the questions set out in the March 2019 Call For Evidence:

1. Key themes and evidence
2. High-level objectives
3. Summary problem statement (Issues constraining the success of the railway)
4. Assessment criteria

1. Key themes and evidence

The evidence papers summarise the key themes and evidence on which the Rail Review will draw in the subsequent phases of our work. Are there other themes or areas of evidence that we should consider? If so, what are they?

Our previous evidence submission set out a number of areas which we consider relevant to the key themes of the Review. To reinforce and expand on these, we have some further observations, which arise from our review of the evidence papers. Some further points are incorporated within the later stages of this response where they are relevant to the high-level objectives, the summary problem statement, or the assessment criteria. Generally, the Combined Authority considers the three evidence papers (plus the supporting *The Rail Sector in Numbers* document) to offer a sound and valuable basis for the further work of the Review.

(a) Current Railway Models report

It is worth noting that, strictly speaking, the Review is not correct in referring to its prime focus as rail in the UK. This is material because, in the context of international comparisons, the railway in Northern Ireland could be potentially instructive. Whilst hampered by historic low levels of investment, recent years have seen large increases in passenger ridership (there is no freight) on the back of incremental improvements such as full fleet renewal and modest infrastructure improvements.

This is in a system based on vertical integration within the railway, a high degree of “horizontal” integration with co-owned buses, and full public ownership – as well as, by definition, full functional devolution.

We would also offer some clarifications to what is said with regard to Switzerland.

- SBB¹, the federal railway, is not the whole story, and it is useful to consider this further, particularly from a devolution point of view. There are numerous other operators, ranging from those like BLS operating interregional axes of international importance, through canton-wide networks (such as Rhaetian Railways [RhB]) via city-oriented networks (e.g. Baseland Transport) down to individual local lines running a few miles, owned and operated by the communities they serve. Whilst taking the legal form of private companies, these are almost entirely publicly owned, but such ownership can take many forms, showing that this may be one way of securing devolution (notably, often legal ownership of the “Privatbahnen”² is shared between more than one body, e.g. cantons and communities).
- While nationally owned and managed, SBB’s own regional operations also allow for a high degree of determination of services (including branding and service /

¹ In full, SBB/CFF/FFS to reflect the three linguistic zones in which it operates.

² This slightly confusing name arises from the railways being legally “Aktiengesellschaften”, i.e. companies limited by shares – but the shares are almost always either entirely or overwhelmingly owned by one or more public entities. Those companies then have operating “concessions” – but not in the sense understood in Britain, as they tend to last for decades and give the operator full powers within the national timetable and fares systems.

rolling-stock specification) by regionally devolved bodies such as cantons. One example is TILO, an independent body formed of a collaboration between SBB and Trenitalia with a view to enhancing cross-border services in the Ticino / Lombardy region. Rolling-stock is supplied and maintained by the two parent state railways, maintaining economies of scale, but services and branding are regionally determined. There is full integration with other public transport modes, and TILO played a lead role in the specification of a new cross-border line.

- Contrary to a suggestion in the paper, Switzerland has seen major timetable recasts – the important point (we refer to this later in this submission) is that these have been meticulously planned and integrated, with timetable leading infrastructure and rolling-stock. The obvious example was the progressive introduction through the 1980s of the *Integraler Taktfahrplan*³, and its development into the Bahn 2000 programme⁴.
- As noted below, subsidy in Switzerland per passenger-km is generally at similar levels to those in Britain, despite the world-class outcomes achieved by the former. This arguably reflects the economies of sustained capital investment as well as efficient delivery. It should be borne in mind that despite high usage and modal shares, not all trains in Switzerland are busy – some are actually fairly empty and therefore costly to run, but it has been accepted they need to operate in order to realise the full value of an integrated, comprehensive network: in other words, the poorly-loaded trains have an option value much greater than their direct financial performance implies.

It is not strictly correct to suggest that there have not been line closures or service cutbacks in Japan: some rural areas have seen these, with links being drawn to demographic changes, particularly rural depopulation.

In general we suggest that the paper to a certain extent might be said to miss the point in terms of a “tension” (arguably, a conflict) between timetable integration and competition: Switzerland achieves its service structure by essentially not allowing open-access competition in the passenger sector; the Netherlands equally do not have it at present, with private-sector operation instead being via concessions within the integrated timetable structure – e.g. to operate a given set of branch-lines from a nodal station. The problem can be seen in EU examples such as Austria and the Czech Republic, in both of which countries (especially the latter) a sustained programme to build up a nationally integrated ITF could be argued to be threatened by private operators exercising open-access rights that EU law has given them to compete against incumbent operators: this can lead to sub-optimal timetabling, to sub-optimal network capacity utilisation, and to a dilution of cross-subsidy by reducing total profit on mainlines and abstracting some out of the railway to the private owner. In Britain, which at present has strict rules on revenue abstraction, it is however right to acknowledge that open-access operators such as Grand Central have brought real value by providing services that the main franchisees have not –

³ Integrated clockface timetable with an emphasis on regular intervals and guaranteed connections.

⁴ See e.g. https://en.wikipedia.org/wiki/Rail_2000

though it could be argued that the success of such independent operators demonstrates the lack of innovation from the main franchised train operators.

While this paper is useful, it could be argued that it would also have been helpful to compare historic practices in Britain and possibly elsewhere: a comparison over time as opposed to spatially. By some metrics, British Rail was highly successful; by others it can be argued to have underperformed – learning from this (“then and now”) could well be instructive in a number of specifics.

(b) The Rail Sector in Numbers

We would suggest there are some additional points to be borne in mind with regard to the information in this paper:

- Building on the point made above, it would be helpful if, where possible, time series could extend back before the mid-1990s, i.e. privatisation.
- The comparison of costs somewhat surprisingly excludes the **cost of the private car – on most flows overwhelmingly the dominant competitor mode**, and one whose perceived operating cost has tended to decrease as rail fares have risen
- The point regarding the socio-economic makeup of rail users (that they tend to be more prosperous individuals) is sound as far as it goes – but for true validity needs to be seen against the fact that this applies to travel as a whole (i.e. all modes), as well as to most individual modes (especially car and, overwhelmingly, air), though not to bus and probably not to active modes. The essential point is that the rich are more mobile. This underlines the point we have emphasised, **that rail needs to perform better as a tool for social inclusion, linking deprived communities in an accessible and affordable manner to opportunities**; a classic example of how this can be done is the role of rail in rescuing the Cardiff Valleys from full collapse in the wake of the decline of the coal industry.
- The freight statistics emphasise tonne-km as a measure; *tonnes lifted* would be less flattering to rail – during the 1990s, “growth” in rail freight was largely due to carrying imported power-station coal long distances, replacing local sources used up until the 1980s. Tonnes lifted would underline that rail freight has in many respects stagnated since privatisation (in its last years BR shed much marginal or directly loss-making freight traffic in preparation for privatisation).
- Congestion: it would be more instructive to use train-km/day per km of *track*, not of *route* – because in much of GB the railway was pared back in the 1970s and 1980s to a far greater extent than on comparator networks. While for example the Swiss network is shown to be roughly 50% more heavily occupied than the Network Rail system, SBB has a significantly more generous amount of track at its disposal on each route and at each station.
- Talking about growth in passenger demand is of limited value without an absolute number, such as rail travel km per person per year or modal shares, both of which measures show Britain to be performing in “mid-table” in European terms,

with rail use and modal shares greater in several comparator countries, often markedly so (such as in Switzerland, the Netherlands and Austria).⁵

(c) The Role of the Railway in Great Britain

We have made in the following section (“High-level objectives”) some observations which we suggest are pertinent to defining the role the railway should be playing within society as a whole.

(d) The User Experience of the Railway in Great Britain

Much of this paper is a useful factual survey to underpin the Review’s work, containing many valuable insights. However (and noting that some of the observations made above are material to this paper too):

- Regional trends: We suggest there is **insufficient emphasis placed on the radical changes in rail use in the non-London city regions** – a step-change in its role which has not been accompanied by concomitant investment in trains nor infrastructure. It could be argued to constitute the greatest single challenge for rail network infrastructure and service planning at present.
- **Disabled people**: It seems surprising that this section does not directly highlight the extent of the problem in terms of an accessible rail system, including trains but in particular stations – although it is explored in more detail in the *Stations and Accessibility* section. It is also worth highlighting that a system that is complex for all passengers to navigate and understand may be even more challenging for those with many types of disability.
- Less frequent users of rail: As discussed further below, we would wish to see **more emphasis placed on understanding those who currently do not use the system at all** (alongside those who use it seldom). This is especially important where it comes to freight, given the large number of industry sectors which either do not use rail freight at all or in which it is marginal.
- Passenger satisfaction / Rolling stock: It is suspected that NRPS and similar tend to reflect passengers’ expectation levels, particularly on “quality” matters such as comfort of rolling-stock: in much of the North, for example, if a train is on time and has seats, it may well be considered satisfactory – the fact that it is 30 years old, dirty, in poor repair and uncomfortable would however limit its appeal if the alternative is a new BMW even on congested roads⁶. Franchise specification and monitoring mechanisms tend to lead to a box-ticking compliance culture, where, for example, new trains are not built to reflect benefits deemed intangible or not material to a “metric”, such as comfortable seating and windows that align – they are procured rather simply to provide a given number of seats. **The passenger experience needs to be objectively attractive rather than rail being a “distress purchase”**. The five priority areas quoted from the Transport Focus work underline this point: they should be considered the basics that can be taken

⁵ See <https://reporting.sbb.ch/verkehr>

⁶ This “circularity” can be seen by comparing overall passenger satisfaction scores of 74% quoted in the paper for British railway in autumn 2017, against 75% for Swiss rail passenger services. It is likely that this overwhelmingly reflects differing levels of expectation. (Source: <https://reporting.sbb.ch/qualitaet?rows=11,14,17,18,23,24,25,26&years=0,1,4,5,6,7&scroll=816>)

for granted, rather than things to aspire to. The commentary with regard to Arriva Rail North fleet renewal is potentially somewhat misleading as, while the Pacer trains are indeed to be withdrawn, the bulk of the fleet will continue to be old (arguably obsolete) vehicles such as Sprinters and the average fleet age at the scheduled end of the franchise will decrease only from 27 to 25 years – in this context it is not clear of the relevance of the statement that the new fleet was larger than was required for the franchise.

- Performance: As discussed in more detail below, **we favour developing a measure analogous to that used by Swiss railways, which both measures real-world passenger journeys and incentives passenger-friendly practices.**
- Stations and accessibility: The ways in which passengers gain access to the network (and egress from it) are highly important too. While other modes are clearly outside the scope of the review, **the current structure of the rail industry makes intermodal integration (and therefore sustainable access to / egress from stations) exceedingly challenging.**

2. High-level objectives

Has the Review identified the right high-level objectives as set out in Chapter 2?

This chapter states:

Great Britain needs a safe and secure railway that is delivering the right outcomes for:

- **Passengers:** *Higher passenger satisfaction and greater public confidence through improved value for money*
- **Taxpayers:** *Improving long term affordability and value for the taxpayer*
- **Wider society:** *Growing social, environmental and economic contributions to the country (including through promoting freight traffic)*

The Combined Authority is generally in agreement with these “objectives”, but would make some further observations, which build on key points from our previous evidence submission, as identified in bold type:

(a) *Ultimate objectives.* It could be argued that these objectives are more in the nature of *outcomes* for the railway. As stated in our earlier submission, **Form should follow function** – and true “high-level objectives”, we suggest, are those which define that function, i.e. that seek to answer the question “*Why are we running the railway?*”⁷. Answers to that question as to the true *role* of the railway would be likely to include matters such as:

- to improve standards of living via an efficient and productive economy;
- to promote social inclusion;
- to aid the transition to a sustainable post-carbon economy;
- to improve and protect quality of life.

⁷ These topics, and in particular the value of rail in sustaining and developing a true “Northern Powerhouse” economy, were explored in more detail in our previous evidence submission.

We suggest that the outcomes listed in Chapter 2 correctly sit beneath such top-level objectives – and whether those outcomes are the right ones can be considered by asking whether they speak to those objectives. We consider that, subject to the following further comments, they broadly do.

- (b) **Passenger satisfaction. The railway should be much more focussed on delivering the service that passengers and freight customers want and need.** Higher passenger satisfaction is certainly an essential measure of the success of the railway within itself, and an indicator of its likely success in meeting the top-level objectives for its role in society: a railway failing to achieve passenger satisfaction is unlikely to attract new passengers, and therefore via modal shift and expanding sustainable mobility to meet those objectives. However, the same applies in much the same way *pari passu* to freight customers too, and we therefore recommend that they should be mentioned.
- (c) **Non-users. Form should follow function – the railway should not exist in a bubble, and requires urgent reform so that it provides the mobility that our society needs, equally well across the country.** For the railway to be truly effective against the top-level objectives we suggest above, there needs to be more emphasis on those who do *not* at present use it: while the railway achieves impressive modal shares on some passenger (and even some types of freight) flows, overall its role within the transport mix as a whole is limited – with impacts both on the consequences of less sustainable, less inherently efficient, modes being used, and on the opportunities open to those whose options in life could be enhanced by attractive and accessible public transport. On the passenger side, those who do not at present use the railway include (though are not of course limited to):
- those who choose not to use rail because it is unattractive, but could do so (this could be addressed by the types of interventions that might drive satisfaction amongst existing passengers);
 - those who struggle to afford the railway specifically and/or public transport in general (a priority from a social inclusion point of view, to the extent that such exclusion may well drive wider exclusion from opportunities in work and education, as well as a poor quality of life);
 - those whose needs are not addressed by existing service patterns (such as those who work non-traditional hours);
 - those whose needs are not served by the current network geography (this might be addressed by better intermodal integration, and in some cases by new stations or routes)

Needless to say, these categories are also relevant to those who (like much of the population) *do* sometimes use the railway but potentially could do so more. Understanding better the motivations and needs of such non-users and low-users would yield invaluable evidence on the future outputs the railway should achieve.

(d) *Value for money.* **The North of England needs a railway structure that supports the ‘Northern Powerhouse’ programme of regeneration, rebalancing and productivity growth through investment, which should primarily be about providing a service to customers and society, with profit being a second-order priority.** Value for money appears twice in the outcomes listed. A more cost-effective railway must be a priority in terms of the overall costs of operating an attractive public service and of delivering enhancements (i.e. both operating and capital costs) – this is the case for reasons of public confidence in the industry, and in order to justify the investment that is needed to enable the railway – especially in the North of England – to unlock its true potential and play a full role in the transition to a sustainable and socially inclusive post-carbon economy for the benefit of society as a whole. However, value for money and affordability must be considered in the right way: it is about achieving better outcomes for the same money as now, and/or achieving the same outcomes for less money.

“Affordability” must not be a matter of simply spending less from one source by transferring the cost elsewhere: for example, continuing the annual “fares escalator”, as a means of reducing the proportion of industry income borne by central Government at the cost of the fare-payer, does not address the cost-inefficiency in the industry, and goes directly against the objectives of railway in terms of social inclusion and of moving towards sustainable mobility by means of modal shift. Value for money must apply to the passenger (and freight customer) too, with affordable fares and tariffs that do not act as a barrier to use. Similarly, “affordability” through “buying less” is no solution: a striking example has been the failure of the Great Western (and to an extent North-West) electrification schemes: excessive cost escalations were not met with a timely and thorough review of working, technical and project-management practices but through scope reductions that have led to the mass procurement of inefficient bi-modal trains and contributed to the rolling-stock crisis in the North. In other words, as discussed further below, the wrong “trade-offs” are being assumed and applied, to the detriment of the railway’s effectiveness in its own terms and against its top-level objectives. “Investment to save” must be at the heart of the new approach to rail. It is also worth emphasising that a railway that achieves better value for money, and is (as advocated in our previous evidence submission) “open for business”, will also be far more likely to be capable of attracting new sources of external funding, be it from private or public sources.

Similarly, improved efficiency in operation and in delivering infrastructure enhancements can and must be fostered by the railway becoming more open to innovative thinking, including challenging standards where appropriate; such openness can be seen in other safety-critical industries (such as aviation) – and can have the further benefit of making it easier for new suppliers (including SMEs) to enter the railway supply chain.

While improved value for money, as properly defined, must therefore be a prime outcome of industry reform, we suggest that the first outcome is wrong

to elide value for money with public confidence (and passenger satisfaction), so would suggest that the two be separated in order that each can be afforded its proper weight.

(e) *Regional differences.* A feature of the British economy at present is its imbalanced nature, with major products of deprivation and economic under-performance at local and regional level – and more generally between the North and the London & South-East area⁸. This characteristic can be observed “writ large” in the railway: the railway in the Leeds City Region (and the North more widely) has for the most part received little significant investment since British Rail days, and wherever this applies the result is that it underperforms against most major criteria (journey times, frequencies, rolling stock quality, punctuality and reliability, capacity and modal share) and cannot realise its potential in terms of strategic objectives. This is both a symptom and a cause of the economic imbalance: the decades-long assumption that rail was of limited relevance in the North contributed to the investment famine, and the poor connectivity to which this contributes has held the region’s economy back.⁹ This has been exacerbated by passenger demand forecasting and investment appraisal methodologies that do not reflect the situation in the North and disfavour investment outside London and the South-East, especially in the regional connectivity on which our economies depend. It follows from this that **different parts of the country will have differing needs which will have to be addressed in rail strategy if the economy is to be rebalanced.**

It follows from the above that we would suggest that there is a case for the following being a potentially better wording for the outcomes (objectives), corresponding to those in Chapter 2:

Great Britain needs a safe and efficient railway that is delivering the right outcomes for:

- **Passengers and freight customers:** *through consistently achieving high levels of satisfaction and being responsive to the needs of those who use and fund it;*
- **Funders:** *through improving long-term affordability and value for money for the taxpayer, fare-payer and freight customer as well as external funders;*
- **Wider society:** *Growing social, environmental and economic contributions to the country, including through:*
 - *modal shift from less efficient and sustainable modes of passenger and freight transport*
 - *supporting the growth of the industries of the future*
 - *creating new and enhanced access to opportunity*
 - *being accessible to all regardless of socio-economic status or disability*

⁸ See for example the work of IPPR North, <https://www.ippr.org/economics-prize/about-the-prize/> - “The UK economy is the most regionally imbalanced in Europe”

⁹ See e.g. <https://transportforthenorth.com/onenorth/> and <https://transportforthenorth.com/northern-powerhouse-independent-economic-review-outlines-opportunity-transform-north-850000-jobs-2050/>

- *being accountable at local, regional and national level.*

Trade-offs

The Review papers refer at a number of points to “trade-offs” that the railway will always need to make between outcomes and/or between outcomes and cost. This is clearly correct. However, they need to be the *right* trade-offs, based on:

- The railway achieving operating and capital costs at levels that bear comparison with international and historic peers (otherwise costs trade-offs are spurious and sub-optimal choices will be made – such as the Great Western example above);
- Full understanding of the differing needs of different parts of the country (and so of the railway), including but not limited to a recognition of the different baseline situation from which the railway in the North is starting in comparison with that in London and the South-East, as a result of the historic disparities in investment levels – this implies meaningful devolution of rail governance and decision-making made by those with the fullest understand of local and regional priorities;
- A better balancing of short- against long-term costs, with a stronger emphasis on “investment to save” (see panel) which drives the long-term effectiveness and cost-efficiency of the railway – classic examples are the benefits of rail electrification and of signalling/train control upgrades;
- Appraisal and forecasting methodologies that are fit for purpose – so that the real benefits of rival interventions are better understood.

As stated in our previous evidence submission:

The railway network is a system. We need a railway framework with aligned objectives, structures and organisational/commercial models. ... Rail franchising is not working for our region.

A very real trade-off to be considered in this context is that between national coordination (the value of a “single controlling mind”) for the railway and the imperative of effective and meaningful devolution. Lessons from other countries suggest that **a nationally coordinated system is not inimical to devolved accountability**, be that in a national publicly-owned rail network (such as SBB) or via regional or local operations (also applied in Switzerland) – it could be said that **what is important is how the “single controlling mind” is directed and to whom it is accountable**. There may however also be efficiency trade-offs between a single entity (such as a “national railway”) and a system made up of smaller entities – i.e. economies of scale. We hope that the Review will explore these critical areas further.

Any structural solution that retains multiple different bodies constituting the railway is liable to create not only complication and diseconomies of small scale, but also risks creating interface costs, which contribute to the costs and inefficiencies of the current system. Where these bodies are in the private sector, “profit leakage” can exacerbate the costs consequences.

Under the current system – and to a greater or lesser extent any that retains for-profit private sector involvement – there is an unavoidable trade-off between serving

the interests of owners and those of passengers, customers and those whose interests the railway serves; there is arguably the scope for this to be a conflict. Some would argue that this needs to be balanced against the perceived incentives that a profit motive is believed to create in terms of overall organisational performance – though the evidence that this incentive is significant is not clear when comparing railway operations of varying models. Our previous evidence submission showed examples from Northern and Trans-Pennine service planning of where an approach driven by TOCs' profit (revenue and operating cost) motives led to choices different from those that a strategically minded body might have made.

Without taking these vital factors into account, trade-offs will not be based on the fullest and most balanced evidence, and so will not be sound.

Case study – Investing to save: Swiss Federal Railways

Since the 1980s, a policy of coordinated long-term capital investment, allied to integration across public transport and a high degree of devolution of regional transport, has helped produce one of the world's most effective railway systems. As a result of such policies, Swiss railways (across all operators) achieve a modal share of 16.5%, within a total modal share for public transport as a whole of 20.3%¹⁰, values around double those pertaining in Britain. The average distance travelled by rail annually per head of Swiss population is well over double the UK's value¹¹, and recent growth in total rail demand has paralleled a stagnation in car use and falls in young people learning to drive. These results are achieved on a network which receives similar levels of subsidy support to the British system¹².

This may be compared with instances such as the Great Western Mainline upgrade, which if anything has added cost by tying passenger services for a generation to the use of costly and inefficient bi-modal trains.

3. Summary problem statement

Has the Review identified the key issues constraining the success of the railway in Chapter 3? What relative priority would you place on them?

This chapter states:

- *The rail sector too often loses sight of its passenger and freight customers;*
- *Over recent years it has come to lack a single strategic direction;*
- *It has become fragmented and accountabilities are not always clear;*
- *The sector needs to be more productive and tackle its long term costs; and*
- *The sector is struggling to innovate and adapt.*

These statements are, in our view, correct, and align fairly well with the “headline” points of our previous evidence submission. The first two points are closely linked to

¹⁰ 2017 figures in passenger-kilometres; from <https://reporting.sbb.ch/verkehr>

¹¹ 1,040pax-km/head/year in GB as against 2,451 in CH – *ibid*.

¹² The comparison is of SBB (which does not comprise the full network) against the British system (TOCs plus Network Rail direct grants); in some years SBB has received less than the British railway but in other years this is reversed.

the question, discussed above, of the need for clear overriding objectives for the railway within our society, driving an explicit set of outcomes – and then specific outputs for the network to achieve (at the level of, for example, punctuality targets or crowding standards).

Integration: At present **the passenger railway operates not so much as a system as in the form of a collection of services that run between various points:** it does not consider the real-world journeys that passengers need to make, even from their origin station to their destination station, let alone from door to door. Partly for this reason, rail's modal shares are extremely patchy, with high values being achieved for radial flows into city centres where there has been investment in service quality (an example in West Yorkshire is the Airedale and Wharfedale routes, which achieve modal shares of 75-85% for Leeds commuting flows) but negligible shares of more complex journeys. Research has repeatedly shown high values for “interchange penalty” compared with systems built around easy and reliable interchange¹³ - this reflects the lack of a strategic view towards the design of timetables with regard to travellers' real-world journeys.

But it is not only individual routes and operators that appear to exist in isolation from one another – **there is a consistent failure to bring together rolling-stock, infrastructure and long-term timetable planning into a coherent strategy.** The Northern Hub and May 2018 timetable are a prime example (see Case Study box, with a comparison against an example of good practice). The reasons of this are discussed elsewhere, but it is relevant to underline in particular the wide variety of vested and conflicting interests within the industry that together militate against best practice being adopted.

Case study – Coherent planning: Northern Hub vs. Prague – Plzeň

The former Northern Way developed the concept of the Manchester Hub (latterly Northern Hub) as a package of interventions designed to alleviate deep-seated network capacity and reliability issues around Manchester which had wider impacts across the North, while also creating new regional connectivity. While it was not accompanied by a full timetable concept and it was not possible to specify firmly the types of train that would be used on each service, a train-service specification was developed to guide the design of infrastructure. However, in the event, the full scheme was not delivered; alternative service specifications were “reverse-engineered” to fit the infrastructure central Government was willing to provide – in particular, capacity enhancements in Manchester Piccadilly and along the Castlefield Corridor were removed. These changes undermined the value of the Ordsall Chord, and, accompanied by an overoptimistic re-writing of the relevant timetable planning rules in an attempt to fit too many trains along the corridor, contributed to the service collapse in May 2018.

¹³ See PDFH, also *Large Changes In Generalised Journey Times Study* (ITS Leeds & Mott MacDonald, 2012; counter-examples where interchange is taken for granted as a principle of comprehensive connectivity would be the Netherlands, Czech Republic and Switzerland.

Another instructive facet of the Northern Hub was the upgrading of the Calder Valley line between Manchester and Bradford: conceived against a target journey time of 50 minutes plus capacity increases, the work was completed in stages between 2016 and 2018. However, because the franchising systems made it impossible to specify the type of rolling-stock to be used on the route, the linespeed improvements were designed for a lower specification of train than was ultimately selected by Arriva Rail North, so the speed profile constructed is sub-optimal: a new class 195 would have been able to run at speeds the assumed class 158 could not have reached. In addition, despite the completion of all works in autumn 2018, it is likely to be December 2019 before the timetables are corrected to match linespeeds. At present, some journey times remain slower than they were in 1981.

A counter-example is the mainline connecting Prague with the Czech Republic's fourth-largest city, Plzeň, a distance of around 100km. Historically this took around 90-100 minutes. In planning for speed improvements, it was recognised that the principles of clockface timetables would mean that a wide variety of connections would be unlocked at either end if the journey time could be brought down to below one hour (around 57-58 minutes is normal where this system is used, enabling hourly connections at each end). This wider approach to timetable planning has regard to the full journey a passenger is making, and in this instance led to a major programme of upgrades on the line, with cut-offs and speed enhancements delivered allied to the performance of existing and planned locomotives. Speed improvements have been delivered as and when the infrastructure was ready, with the journey time now down to 63 minutes – when the scheme is complete, the drop below one hour will allow Plzeň's main station to function as a full connectional node. This approach has been driven by a strategic long-term overview of the timetable, infrastructure and rolling-stock as a whole, with clear system output (hourly trains with a journey time of less than one hour from Prague) identified at the outset – and stuck to¹⁴.

The problem is however larger still than this: **the railway in Britain can be seen as operating in “splendid isolation” from other means of transport**, with (outside London) integration with buses in particular being exceedingly difficult to plan. This is inimical to creating a public transport network that is attractive for a wider variety of journey types and purposes – an outcome that is essential if the Combined Authority's social, economic and environmental objectives are to be met. It follows from this that joining up public transport policy as a whole – and rail policy in particular – with regional and local plans for economic, spatial and social change is very challenging.

A linked issue is that the rail in **the North has for decades been “behind the curve” in terms of providing for capacity**, playing “catch-up” with growth that the industry perennially fails to forecast, with poor demand and benefits modelling allying with unsuitable appraisal methodologies to leave the North's railway dependent on

¹⁴ The principle of designing journey times to meet a timetable concept (“as fast as necessary”) rather than designing a timetable to what given infrastructure will allow (“as fast as possible”) is inherent to integrated clockface timetabling, i.e. the *Taktfahrplan* concept. Similar examples can be seen in a process of “real-time” development in the Czech Republic (Prague – České Budějovice with a target of under two hours) and complete in Switzerland (upgrade of Zürich – Bern to achieve a 56' journey).

repeated underspecified “sticking-plaster” interventions, rather than being ahead of the game as a strategic approach to capacity and connectivity planning would enable. Given the ample evidence of historic and predicted economic growth in Leeds city centre¹⁵, for example, a well-functional railway would have been aware that greatly increased train (and network) capacity into the city would be needed, and would have provided for it in good time. Similarly, at present there is major housing growth around Pontefract, but the Combined Authority has so far struggled to make the case for the improved rail connectivity and capacity that should accompany this.

The railway must be accountable to those that use, fund and benefit from it; as discussed above and in our previous evidence, a crucial part of this must be *meaningful* devolution of rail in the North to bodies with *genuine power* to make decisions, guide planning and enforce agreements: see Case Study below. This demonstrates that **true devolution must encompass genuine power (to specify, to manage, to enforce), as well as accountability of the devolved body and governance structures that ensure members’ priorities are put into practice.**

Case study – Partial devolution in the North?

The Trans-Pennine and Northern franchises have been subject to a partial devolution that does not meet the North’s needs in terms of decision-making or accountability. Transport for the North (TfN, formerly Rail North), and through it transport authorities such as ourselves, had some role in informing the specification of the franchises. However, the franchise agreements were ultimately signed solely by the Secretary of State. In consequence, despite the existence of the Rail North Partnership, under which franchise management responsibilities are considered shared ultimate decision-making power remains firmly with DfT. In consequence, it has appeared difficult for TfN to ensure that franchise commitments are enforced and so that the interests of rail travellers in the North are protected, despite TfN having reached clear positions via its own democratic governance processes.

An example has been that TfN were unable to ensure that sufficient capacity was in place on the TPE franchise in May 2018, specifically on the severely crowded North Trans-Pennine route, with new-build stock having been delayed and a franchise commitment to utilise additional older vehicles on a temporary basis not having been enforced. TfN member authorities including the West Yorkshire Combined Authority made their view clear, that additional train capacity was essential if the May 2018 timetable concept was to be introduced successfully, and sought dialogue with the operator both directly and via TfN as to options to achieve this. However, such meaningful dialogue did not take place, and ultimately the timetable changes went ahead with no additional trains in service. As a result, crowding conditions became worse. The situation became worse when, after train performance collapsed from May 2018 and it became accepted that the relevant timetables were unworkable, TPE developed plans to improve performance that would have been wholly unacceptable in terms of cutting connectivity – but did consider alternatives that

¹⁵ See e.g. Deloitte’s *Leeds Crane Survey 2019*: <https://www2.deloitte.com/uk/en/pages/real-estate/articles/leeds-crane-survey.html>

would have required additional resources and/or curtailing revenue-generative routes that were not critical to capacity provision. In December 2018, the situation became still worse with further peak trains-being de-strengthened (6 carriages to 3) as a result of initiatives to increase trains' turnarounds. At the time of writing this submission, it is understood that the position will become even worse in May 2019, with, as a result of a further timetable change and continuing delays to the new fleet, the last peak TPE trains serving Leeds that are still six carriages being halved in length. This is believed to represent a 38% *reduction* in train capacity in the morning high-peak hour on fast trains from Huddersfield to Leeds, one of the most crowded routes in the country. At every such timetable, the Combined Authority (and our counterparts in other regions such as Greater Manchester) have not only protested but proposed concrete alternative plans, but these have been either dismissed summarily or ignored. We consider that the reduction in capacity was entirely avoidable but a symptom of an inability of TfN to manage the franchise effectively in the face of a de facto veto in DfT.

If franchising – or the provision of passenger rail services by any private-sector arm's length body – is to continue, the devolved body must have the power and discretion to ensure that the enforcement of franchise agreements is carried out whenever this is in the interests of the passenger, rather than decisions being taken in London that have direct impacts on the ability of people in the North to reach their work and education. If this does not happen, it could be argued that the franchise agreement becomes a valueless document.

It follows that what is required is meaningful devolution, to bodies that:

- are representative of the regions they serve
 - are democratically accountable
 - have the powers needed to ensure the rail system delivers, including the ability to enforce agreements with operators and to make strategic planning decisions
 - are funded sufficiently to make their own investments and funding decisions
 - have a seat at the table of national strategic rail planning,
- and to whom the train operator is genuinely accountable and answerable

Tackling cost has been discussed above; in addition to this, the railway at present does not inspire confidence that it is consistently able to develop and deliver the most appropriate solutions to identified needs, tending to lack flexibility and pragmatism – and so stifle potentially sound innovation.

In summary, therefore, we would suggest the following additions to the summary problem statement:

- *The rail sector too often loses sight of its passenger and freight customers;*
- *~~Over recent years it has come to~~ lacks a single **clear** strategic direction **and long-term vision to guide planning decisions**;*
- *It has become fragmented and accountabilities are not always clear;*
- ***The railway is not integrated within itself, nor with public transport as a whole, making it difficult to align its priorities with economic and spatial planning***

- *The sector needs to be more productive and tackle its long term costs; and*
- *The sector is struggling to innovate, ~~and~~ **adapt and respond flexibly and pragmatically to user and stakeholder needs***

4. Assessment criteria

Do the broad assessment criteria in Chapter 4 capture the right issues against which the Review should test its proposals? What priority should we attach to each and how should we balance trade-offs? Are there other issues we should consider?

Again, the Combined Authority is in broad agreement with what is proposed here, but we have some additional observations. Clearly there is significant overlap between several of the outcomes listed (such as that performance improvements and value-for-money fares will drive public trust in the industry), but we do not see this as a difficulty with the expressing the outcomes in this way, nor do we see any obvious advantage to grouping the outcomes in a different way to that suggested.

The first group of outcomes is under the heading “*Passengers*” – we need also to have equivalent entries for freight customers (and future customers) – the entry under “The Fundamentals” section is good as far as it goes, but the needs of the ultimate customer (as opposed to just those who current operate freight trains) need to be more explicitly reflected.

Performance: The measures chosen need to have the passenger and customer at their heart, and not drive a “compliance culture” (or indeed a blame culture) and perverse behaviour (such as incentivising early departure and failures to hold connections), as can happen with the current measures, especially PPM. Again the Swiss experience is instructive: while a simple (albeit demand-weighted) arrival punctuality measure gives a 90.2% score for 2017 using a 3-minute threshold, the preferred measure is one that reflects passengers’ actual experience in terms of their end-to-end journey – passenger-weighted connectional punctuality. Because this more advanced measure considers a passenger’s arrival at their true destination, small delays that do not in fact affect that journey (because for example a connecting service is still made) are ironed out and need not be counted, reflecting and incentivising a passenger-friendly approach to timetable planning and operational decisions. As a result, the revised score under this measure is significantly higher: 97.2% for the same year¹⁶. Comparison of these numbers illustrates that the legendary Swiss reputation for punctuality is not so much about trains arriving at every station on time, but about passengers’ real-world journey experiences being reliable as a whole. We would advocate a similar approach for the British passenger rail network as an important tool in driving and measuring improvements in performance that can be directly felt by travellers. It is also worth noting that SBB

¹⁶ Source: <https://reporting.sbb.ch/qualitaet?rows=8,9,11,14,17,18,23&years=0,1,4,5,6,7&scroll=490>, with 2017 figures used for “Kundenpünktlichkeit” (simple punctuality) and “Kundengewichtete Anschlusspünktlichkeit” (the more advanced measure reflecting true journeys). Details of how this approach works are in the Appendix.

also use a demanding 3-minute delay threshold for freight transport, achieving 74.9% in 2017¹⁷.

Value for money: As discussed above, this needs to cover the matters listed, but also to address the need for the railway not to exclude socially due to fares levels that are unaffordable for potential users: **the level of fares should not be a significant barrier to use of the railway**, including by the unemployed / low paid, by families, by students and the retired. **Fares must also be at levels that are attractive compared to alternative modes** – and can be readily accessed by the non-expert user for journeys of all types, regionally, nationally, internationally and across modes – in order to achieve modal shift from car and aeroplane. In other words, it is about *affordability and price-competitiveness*. Single-TOC pricing regimes, arbitrarily different fares rules between TOCs, and unhelpful innovations such as TOC-specific smart-cards and Advance Purchase On The Day tickets have confounded complication and confusion while doing little for overall competitiveness. It might be argued that a move away from net-cost (revenue-risk) franchises would be beneficial by allowing the creation of one nationwide and/or regional fares regime.

Case study – Attractive fares?

The Cross-Country network has over an extended period moved away from catering to one of its core traditional markets, families from the North taking a holiday in the South-West. Taking the example of a family of four wishing to travel from Leeds to Torquay for a week, booking around a month in advance, the cheapest fares available total over £400, with flexible tickets (in standard class) closer to £500. While a Family & Friends railcard can reduce this to £200-300, this is wholly uncompetitive with a likely car fuel cost of under £100.¹⁸ Similarly, a one-day business trip from Leeds to Birmingham, booking two days in advance, can be expected to cost around £130 (some restricted advance-purchase tickets are available from around £64); savvy travellers can however save over two-thirds of the cost of a flexible ticket by splitting their ticketing at multiple locations, a practice that discriminates against occasional users of the railway and contributes to the low trust in the railway that has been reported amongst the public.¹⁹

The position is worse still for international travel: attempting to book from Leeds to Frankfurt via Eurostar simply generates an error message. While specialist websites such as loco2.com will simplify slightly the task of collating the mixed tickets required, the fares that result are neither competitive nor easy to access – the railway is poor value for money and will struggle to compete with aviation, particularly with air fares at their current low levels.

¹⁷ Ibid.

¹⁸ Fares checked 17 April 2019 at <https://www.buytickets.crosscountrytrains.co.uk/buytickets/combinedmatrix.aspx?Command=TimeTable>, and car fuel costs at <https://journeyprice.co.uk/>. For the vast majority of car users, costs other than fuel (fixed or variable) are not perceived as relevant to the modal choice for any given journey.

¹⁹ See e.g. <https://www.which.co.uk/news/2018/11/complaints-about-complaints-train-passengers-fed-up-with-how-theyre-treated/>

In contrast, some European railways cooperate with their counterparts across borders to produce attractively priced promotional tickets, such as Czech Railways offering Prague – Frankfurt – Brussels for under £17 single.

It is equally essential that the railway is able to provide competitively priced – and more comprehensive and coordinated than now – freight services, if the environmental and economic superiority of rail is to be fully exploited as against road and air competition that pays only a small proportion of its true costs.

Public Trust: As noted above, confusing and illogical fares regimes play a role in harming public trust. Trust also however is engendered when rail operators communicate clearly, consistently, reliable and honestly with users of the system, such as at times of disruption – and when they handle such disruption in a predictable and rational manner that puts the passenger first. Analogous considerations apply to freight customers and industry (potential customers): they must have confidence rail can, literally and metaphorically, deliver.

Enabling the journeys people want to make – including across modes: This is discussed in some detail above in relation to the passenger sector, and is strongly agreed by the Combined Authority. With regard to freight, enabling the journeys shippers need their freight to make includes (though is certainly not limited to) **ensuring that the network makes proper provision for the attractive train paths freight needs**; there is at present real concern that the Trans-Pennine Route Upgrade, for example, may fail to do this.

Affordability (all three criteria): Once again, these are supported by the Combined Authority, though some of the specific terminology might be open to improvement: at the level of the system funder (as opposed to that of the prospective passenger or customer considering fares/freight tariffs), “affordability” and [financial] “sustainability” can have an element of subjectivity and only considers financial “inputs”, not what outputs the system achieves. Developed countries have long recognised that **the value of a railway – in terms of what it enables in terms of wellbeing, economic efficiency, quality of life and environmental sustainability – far exceeds its direct farebox or freight revenue**, and that a railway that attempted to run on a narrow commercial basis would be unable to provide these benefits. We would rather therefore instead use the language of “*cost-effectiveness*” in this context – with an emphasis on best practice.

The second sub-heading, “*commercial sustainability*” appears to be really about, to use the language of our previous submission, having **a railway that is “open for business”**, i.e. is adaptable to its surroundings and easy to do business with – rather than its current excessively risk-averse, bureaucratic and process-driven nature. We would also prefer to avoid the word “resilient”, as this implies a body that is unchanging – while being consistent, the railway needs to be able to adapt to changes in its environment, such as increases in passenger demand or changes in the logistics market.

We would suggest:

Cost-effectiveness

1. *Productivity and efficiency.* The costs of operating, maintaining, renewing and enhancing the rail network must be **brought down to levels comparable to international best practice**, allowing the industry to address long-term cost pressures and ensure value for money for taxpayers and users
2. *Commercial **partnership**.* The future industry structure must be **suitable for and adaptable to a changing environment, balancing risk and opportunity appropriately, fostering new ideas and creating incentives that align with the railway's objectives**
3. *Seizes opportunities.* The railway must ~~continue to~~ seize opportunities to drive quality improvements, increase usage, explore commercial opportunities, and find efficiencies **such as by investing to save**

Turning to “*The fundamentals*”, the Combined Authority is strongly in agreement with the first sub-heading, which is particularly well phrased: while the railway must not contemplate compromising its world-leading safety record, which may never be taken for granted, there are instances where misapplied safety considerations have prevented the right decisions from being made – sometimes as a result of a lack of a real understanding of the issues involved, or resulting from a perceived or real lack of authority or discretion amongst staff with the requisite expertise, underpinned with a lack of incentive to think imaginatively and challenge assumptions or standards. An example is the question of what norms should be adopted for safe clearances for overhead electrification.²⁰

Environment: Again this wording is, in our view, strong and flexible, though there is an argument for underlining that, given rail’s inherent energy-efficiency advantages and its unique ability to use renewably generated electricity as a direct traction source, **modal shift to rail (passenger and freight) is itself a significant contribution to sustainability** and to meeting the national and regional imperatives of carbon reduction and of acceptable air quality. We would also advocate adding to the entry the words “... *its environmental benefits, as part of the transition to a post-carbon economy*”.

Rail freight: We need to be clear that **rail freight should expand into sectors in which it is at present absent or underperforming**, if the railway is play its full role.

‘System changes’ category: Again, we consider these principles to be sound.

- *Focus on users:* This must be right, subject to comments above in relation to (current) non-users, and to the role of public funders and specifiers in achieving the outcomes they require from the network. How this is to be achieved if part or all of the railway remains primarily accountable, and owing a legal duty, to third-party shareholders would need careful consideration.
- *Accountability and leadership:* There is also a need to make sure that those making management decisions are the right people in terms of their technical

²⁰ In this regard the Rail Industry Association’s analysis of the costs of rail electrification is particularly helpful: https://www.riagb.org.uk/RIA/Newsroom/Stories/Electrification_Cost_Challenge_Report.aspx

background and skills – and then that those people are *empowered* to make technical decisions including applying their professional expertise to achieve the right outcomes. These managers must then be held accountable to representatives of the communities served by the railway. As discussed above, that accountability must wherever appropriate be to devolved bodies with genuine authority (as opposed to the mere delegation of specific tasks to a local or regional level).

- *Collaboration*: We need to emphasise explicitly that **there is a need for a transformation towards openness and honesty with funders, specifiers and local/regional government – as well as within the industry itself**. At present there is a culture of excessive “commercial confidentiality”, PR spin and narrow self-interest, such that for example the only way in which Combined Authority officers have been able to obtain information about our train operators’ fleet situation has sometimes been via rail enthusiasts’ internet fora. This lack of information sharing causes avoidable work and raises the risk of inaccurate information becoming public. Experience over the last two decades has shown that any benefits arising from competition between train operators are marginal as against the foregone benefits of collaboration and cooperation between those operating different services. That may or may not point to fewer or a single-operator model in future – as noted above, Switzerland has numerous operators but their system is characterised by cooperation and accountability.
- *Long-term thinking and innovation*: It would also be appropriate here to emphasise that there is a need for such thinking to be strategic in nature – that is, the railway having a clear direction articulated through a “controlling mind” with the authority to put it into effect. As alluded to above, an example of the benefits such long-term strategic thinking could reap would be the ability to have a national or regional rolling-stock strategy linked to infrastructure and service development, covering electrification, the acquisition of new trains, and the coordinated cascade of existing stock through the network to the most appropriate services, leading to efficiencies and a general uplift in the quality of the passenger experience.
- *Delivery capability, including of change*: We highlighted above the need for the right staff to be in the right positions and empowered to make the right decisions. Allied to this – indeed critical to its success – is that **the railway must be an attractive career prospect** with excellent training and a clear progression structure: it must recruit, retain and develop staff who are “steeped” in the railway, while remaining open to fresh ideas and talent from outside. In some respects the old BR Management Training Scheme was regarded as a “gold standard” of its type, but it should be recalled that many excellent staff have also “risen through the ranks” – a process that the balkanised structure of the present railway has tended to stifle. (These themes are clearly linked to the last sub-heading too.)

5. Conclusion

The Combined Authority considers this second Call For Evidence, the proposals within it, and the various recent supporting papers, to be overwhelmingly encouraging in terms of confirming that the right, often difficult, questions are being asked, and that there is a willingness to challenge existing thinking, which promises the prospect of imaginative solutions emerging from this Review. We hope in this context that our input is considered helpful and look forward to contributing further to the Review as it progresses through 2019.

We consider the evidence emerging, including from our own submissions, to underline that the Review should remain open to considering all structure, governance and ownership options that might assist in bringing about the deep changes that the industry needs, even if these changes will require careful management during transitional phases.

We consider that the case for further – and more meaningful – devolution is strongly evidenced, and that there does not appear to be any insuperable conflict between devolved accountability and the efficiency, economies of scale and system-wide coordination that the railway needs. Such real devolution will be a critical step to ensuring that the railway's priorities better reflect the communities served and the diversity of those who travel by train, and that it is answerable to them.

Appendix 1 – West Yorkshire Combined Authority first evidence submission

Williams Rail Review: Call for Evidence

Submission of the West Yorkshire Combined Authority

1. Executive Summary

- **The chaos unleashed on passengers and the economy since May 2018 confirms that the current UK organisational and commercial railway frameworks are not working for our region.** As a founding member of Rail North and Transport for the North, West Yorkshire Combined Authority and Leeds City Region Local Enterprise Partnership (the LEP) welcome the Williams Rail Review as the catalyst for the fundamental shift that is needed in the way the rail network works for passengers and for the country.
- **The railway should be much more focussed on delivering the service that passengers and freight customers want and need.** A reformed framework is urgently needed to ensure customers (passengers and freight) in all parts of the UK receive a level of service comparable to the best in the world. Structures should be re-configured in a way that places the delivery and planning of current and future rail services (and requisite infrastructure), with passengers and freight customers at the heart of everything. Devolution of the funding, decision-making levers and accountability for rail outcomes to locally elected Members is needed.
- **Form should follow function - the railway should not exist in a bubble, and requires urgent reform so that it provides the mobility that our society needs, equally well across the country.** The railway's structure should be derived from its purpose. To deliver a railway that can support our objectives for sustainable, inclusive, economic growth, our region needs greater devolution of decision making powers about rail outcomes to the sub-national and local levels where the requirements for and impact of those outcomes are best understood.
- **The North of England needs a railway structure that supports the 'Northern Powerhouse' programme of regeneration, rebalancing and productivity growth through investment, which should primarily be about providing a service to customers and society, with profit being a second order priority.** Following decades of under-investment, the north is engaged in a multi-generational programme of economic re-balancing. We need a railway focussed on this long term mission, which supports changing and growing labour markets, which recognises that the investment case in the north will be different to that elsewhere, and which is affordable to all in society. The current system is not delivering and has conflicting objectives and drivers.
- **The railway network is a system. We need a railway framework with aligned objectives, structures and organisational/commercial models.** We need a railway structure that treats the network as a system that can get the basics right, but which is also focussed on the delivery of growth in demand for, and improvement of, the passenger and freight railway.

- **Rail franchising is not working for our region.** Alternative approaches are needed that integrate track and train, and that deliver the services that our region and customers actually want, now and in the future.
- **The railway needs to be totally accountable to democratically elected government at national and sub-national levels for rail outcomes.** There needs to be a clear, golden-thread of transparent accountability between the strategic objectives for rail set and agreed between national, sub-national and local politicians, and the ultimate service delivered and decisions made day to day by the rail industry, to and on behalf of customers. Effective accountability will in turn allow detailed industry decisions to be taken within the industry.
- **The railway needs to be open for business.** As a third party investor in the railway with a planned rail investment portfolio currently worth £250m, we often find the railway hard to do business with.

2. Introduction

The West Yorkshire Combined Authority (hereafter WYCA) working in partnership with the LEP, operates to ensure that our region is recognised globally as a strong, successful economy where everyone can build great businesses, careers and lives. We bring together local councils and businesses to achieve this vision, so that everyone in our region can benefit from economic prosperity and a modern, accessible transport network. We have four main areas of focus:

- **A strong economy** – helping businesses to become more productive and create more, better quality jobs for local people;
- **Inclusive growth** – ensuring everyone in our region can benefit from this strong economy;
- **21st Century transport** – creating modern, efficient transport infrastructure that supports communities, the environment and our economy; and
- **Devolution** – securing funding and powers to help us do even more.

WYCA is the Local Transport Authority for West Yorkshire, and subsumed the powers of the former Passenger Transport Executive in 2014. We are a founding member of Rail North and Transport for the North (hereafter TfN), England's first sub-national transport body. Through its Partnership Agreement with the Department for Transport, TfN has an important role in the planning of rail and road investment across the north, as well as the management of the First Transpennine Express and Northern rail franchises.

This response seeks to inform the deliberations of the Williams Review with evidence from the perspectives of WYCA being:

- a Local Transport Authority and therefore significant stakeholder in the railway;
- a founding member of and partner in TfN, therefore having an indirect contractual relationship with the railway through the planning and management of infrastructure and service development and delivery; and

- an investor in the railway, with a current portfolio of rail enhancement schemes worth circa £250m in total.

3. The chaos unleashed on passengers and the economy since May 2018 confirms that the current UK organisational and commercial railway frameworks are not working for our region

WYCA is the Local Transport Authority for West Yorkshire. One of our statutory functions is to develop and implement a Local Transport Plan for our area – our current plan is known as Transport Strategy 2040, which can be found at:

- <https://www.westyorks-ca.gov.uk/media/2664/transport-strategy-2040.pdf>

A successful and growing railway is a major part of our transport strategy, and has been a key tenet of successive plans for the last 20 years or so. We have been working with partners in Government, in the rail industry and across the north for a long time on developing a successful railway. We would define success as a railway that supports our wider objectives, with the corresponding rail outputs as follows:

- Reliable and punctual;
- Modern and of a high quality;
- Integrated with other transport modes - easily accessible from across the region;
- Fast and frequent;
- Of sufficient capacity for passengers and freight;
- Accessible to all;
- Value for money for fare-payers and taxpayers;
- Welcoming station gateways - supportive of our place-making and regeneration plans.

In our latest strategy, we are looking to grow the number of trips made by rail by 75%, come 2027. Whilst rail demand across West Yorkshire doubled between 2005/6 and 2014/15, this came about largely without any major investment in improved rail infrastructure or services (with the notable exception of a new rolling stock fleet for Transpennine Express). The previous Northern Rail franchise was even let on a no-growth basis. The evidence²¹ demonstrates that it has been exogenous rather than endogenous changes that have driven this i.e. the changing economic geography of the northern city regions, as well as a limiting of car parking supply in city centres due to former brownfield land regeneration.

It is therefore of the utmost concern to us that despite years of work, time and money, the current railway frameworks are failing to deliver for us. The May 2018 timetable fiasco (which itself was postponed from December 2017), and the ensuing and indeed emerging revelations about what can and can't be delivered in terms of committed franchise outputs for our region i.e. the success that we have sought to deliver (more of which later), lead us to question the fundamental structure of the

²¹ Northern HLOS Growth Study; March 2010 – *Mott MacDonald for the Department for Transport*

railway. We believe that it is nothing short of broken, and therefore doing nothing is not an option. We therefore warmly welcome the Williams Review as an opportunity to drive reform.

4. The railway should be much more focussed on delivering the service that customers want and need

As you will appreciate, Transport Focus has a plethora of evidence about what passengers really want from the railway, as do freight operators/industry bodies. For customers, a railway that delivers services that are reliable, punctual, value for money, integrated with other transport modes through modern and welcoming stations, easy to navigate, fast, frequent, of a high quality and with enough capacity, are imperative to enable people and goods to move from A to B.

The actual timetable forms the bulk of the end product that the passenger buys when they purchase a ticket. One would expect that as a result, the delivery of the timetable i.e. the services customers want, should be at the very heart of everything the rail industry is working towards, both in terms of day to day operational service and infrastructure delivery, and longer term planning and investment. In other countries, this emphasis on the end timetable to the customer being at the heart of long term planning and investment in the railway, is not unusual. For example, in 2018 the German Government announced its plan for a nationally integrated timetable to be delivered by 2030²². To realise this, a consistent programme of planning, investment and delivery is required beyond the usual Parliamentary term. If the May 2018 timetable chaos demonstrates anything about the UK railway frameworks, it is that **the actual timetable delivered to the customer is in fact the last thing to be thought about, rather than the first.**

In the UK, individual commercial drivers often misalign with passenger interests. Fundamentally, the railway is important to us as it helps us grow access to jobs and services for growing labour markets, provides connectivity, and ultimately drives productivity. This is highly relevant to West Yorkshire where high employment levels in Leeds mean that to increase productivity further, a successful railway is required that reliably connects labour markets with employment opportunities. This means the railway needs to serve passengers well. Rational (at the corporate level) commercial drivers and issues with the structure of the current railway means that passenger interests are not always paramount. For example, the peculiarity of ticket revenue allocation in the rail network means that operators can be incentivised to run trains where they are not most needed. There are examples of this around Yorkshire. There are three operators of trains between Newcastle and York, delivering 6 trains per hour. However, each is incentivised to sell tickets valid only for its own trains, limiting the benefit of the high frequency of service. Consequently there are hundreds of ticket combinations between Newcastle and York, driving passenger

²² <https://www.bmvi.de/SharedDocs/DE/Pressemitteilungen/2018/080-scheuer-deutschlandtakt.html>

confusion. Ensuring that the whole railway better serves customers, communities and businesses must be the starting point of any reform.

5. Form should follow function - the railway should not exist in a bubble, and requires urgent reform so that it provides the mobility that our society needs, equally well across the country.

It may seem a statement of the obvious, but it is important to recognise that as well as serving its customers, the railway is there to serve a wider purpose in our society, and is not an end in its own right. Its organisational frameworks and structure should fundamentally be developed based on the function the railway is to serve. It is part of the wider mix of transport infrastructure and services which together, provide vital mobility for people and goods to move around and to/from our country. The railway can have impacts in the following ways:

Economic:

The intrinsic link between economic growth and high quality transport, including rail, has in the last decade or so been increasingly better understood, with the Eddington Study²³ being one of a number of keystone pieces of research into the subject. The economic strength (in GDP per capita terms at least) of the London and South East economy, with its focus and growth in 'Knowledge Intensive Business Services' (KIBS) jobs, has been greatly facilitated by a relatively modern railway. The economic pull of London draws in workers and business people in large numbers from around the south east and indeed well beyond it. The railway does in large part enable this to happen on a daily basis – connecting people/labour markets to jobs with fast, frequent, well integrated (with other transport modes in London) rail services between the capital and its commuter heartlands and beyond.

Whilst there is evidence that working patterns are changing which could be affecting demand for rail, there is also evidence that the continued strong presence of KIBS jobs, and the tendency of these to cluster together and agglomerate, will continue to mean rail demand to/from city centres will remain strong.

Social:

The railway, as part of a wider transport network, can support and enhance social inclusion and inclusive growth. It can do this by connecting people to economic opportunity, by connecting communities to each other and to health, education and leisure services. The railway is also a significant employer and procurer of goods and services, which can benefit local economies and communities. The railway governance structures adopted since privatisation have facilitated some progress and success in this regard. There is evidence for example of Network Rail²⁴ and

²³

<https://webarchive.nationalarchives.gov.uk/20090115123503/http://www.dft.gov.uk/162259/187604/206711/executivesummary.pdf>

²⁴ <https://www.networkrail.co.uk/communities/social-performance/>

Train Operating Companies²⁵ adopting and implementing social sustainability policies, whether that be buying from local supply chains, engaging and investing in community rail programmes, and pro-actively creating training programmes to upskill people to work in the rail industry. This is all positive progress which should be noted, and further and overtly enhanced through the Review.

Environmental:

As part of an integrated transport network, the railway can help minimise the negative effects (e.g. highway congestion, noise, air and carbon pollution from highway transport, land-take and so on) of less sustainable modes of transport by encouraging people to use public, rather than private transport. This has always been important, but we would argue has been given new impetus since the Paris Climate Agreement and the ensuing need to further focus efforts on reducing greenhouse gas emissions. The Government's Clean Growth Strategy²⁶ highlights that by 2015, the transport sector accounted for 24% of total UK emissions. To achieve our emission reduction targets, a 30% reduction will be needed. The railway has hitherto been focussed on and has had some success in reducing its own emissions, waste and resource use. This is positive, however it is through transport mode shift from private car use to integrated public transport including the railway, that significant gains can be made.

For taxpayers, society and the wider economy, a well-functioning, modern railway is critical if we are as a country to deliver on our economic, social and environmental objectives. It is vital that new organisational frameworks for the railway in the UK facilitate the railway operating in a way which is much more outward looking, is cognisant of and which prioritises improvements to its wider societal impact. Whilst it is obvious from rail company communications material and events that this is acknowledged and understood, it is not always apparent from some of the actual behaviours of the companies. A railway that continues to place short term commercial interest over long term societal wellbeing is not one that the country can afford. The two examples below seek to outline the sort of behaviours we would like to see disappear from the railway under a revised organisational framework:

- **Arriva Rail North:** In December 2018, despite it not being a franchise commitment, Arriva introduced an additional York – Leeds service calling only at Church Fenton. This increases the number of trains between Leeds and York from six trains to seven trains per hour in each direction. The east of Leeds corridor has been highlighted by Richard George, TfN and the Department for Transport's advisor overseeing infrastructure and train operations, as a network congestion hotspot, therefore not a location one would think to increase pressure on the network yet further. This service cuts the ability for people to get easily between east Leeds and Bradford and

²⁵ <https://www.tpexpress.co.uk/about-us/our-plan/people>

²⁶

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/700496/clean-growth-strategy-correction-april-2018.pdf

arguably, uses rolling stock that could have been utilised to help support delivery of actual franchise commitments. This proposed change was therefore something we opposed, however it would be interesting to understand whether or not the way the “ORCATS” (Operational Research Computerised Allocation of Tickets to Services) system works has influenced this decision..

- **First Transpennine Express:** Improvement and consistent delivery of planned peak passenger capacity into Leeds is a major priority for WYCA. Reliably delivering an effective service that allows people to get to work on a daily basis is a core basic role of the railway. However from December 2018, there are now 25% fewer seats between 08.00 and 09.00 on TPE’s fast services between Huddersfield and Leeds than in December 2017. This is because priority has been given to service extensions over capacity provision e.g. in December 2017 TPE’s Manchester Airport to York service was extended to Newcastle. We would argue that the commercial driver for this decision has trumped other outcomes.

6. The North of England needs a railway structure that recognises and works with the ‘Northern Powerhouse’ programme of regeneration, rebalancing and productivity growth through investment, which should primarily be about providing a service to customers and society, with profit being a second order priority

Any new railway organisational framework should recognise that ‘one size does not fit all’, and that society’s needs of the railway may be different depending on the region being served. The north of England has over the past decade and a half, commenced what could well end up being a multi-generational economic re-structuring exercise, if the vision of a ‘Northern Powerhouse’ economy is to be realised. There has been a plethora of research into the economic and spatial rebalancing agenda in the UK²⁷. The railway is intrinsically linked to this re-balancing agenda, as a reliable, growing and improving railway will help better connect labour with employment markets, businesses to opportunities, people to leisure and goods to market. The economic re-structuring that has taken place so far has brought with it a consistent rise in demand for rail, particularly for travel to and between our city centres, with passengers having to endure often unacceptably overcrowded conditions²⁸. This has been driven in large part by the growth in KIBS based jobs in city centres, which rail has been ideally placed to exploit and support.

There is a question however about whether the railway’s current structures, commercial arrangements and cost allocation processes, which were designed in good faith with the London and South East, or indeed inter-city markets in mind, are

²⁷ <https://academic.oup.com/joeg/article-abstract/13/6/889/924921?redirectedFrom=fulltext>

²⁸ DfT Rail Statistics 2017: <https://www.gov.uk/government/statistics/rail-passenger-numbers-and-crowding-on-weekdays-in-major-cities-in-england-and-wales-2017>

really right for the objective of regeneration in the north. There is evidence²⁹ that the current methodology for railway cost allocation is biased against regional rail, making it appear artificially more expensive to run than it actually is. This in turn makes it a lot harder to construct an investment case for rail in the north to support regeneration.

We consider that there is an overarching tension in the terms of reference for the Review which is worthy of consideration up front. This being the extent to which the continual policy to re-balance the source of the railway's funding from tax-payer to fare-payer, over successive governments, impacts upon the possible frameworks for the railway's organisation emerging from the Review. The McNulty Review³⁰ demonstrated that the UK railway cost about one third more to run than other European equivalents. What McNulty didn't consider however is what the "right balance" between taxpayer and fare-payer funding for the railway should be, and how the railway should therefore be structured to help achieve that. It is right that the UK railway should be as affordable as other equivalent railways and that the taxpayer and fare-payer need good value for money. If however the railway is viewed purely in financial terms and in isolation by Her Majesty's Government from the economic, environmental, social, housing, health and other impacts that it has, that leads to organisational frameworks and structures that could work against the achievement of wider Government policy. For example, if the railway is unaffordable for people on lower incomes, or for the unemployed seeking work, this will be damaging for policies to rebalance the economic divide in our country, particularly as jobs continue to shift to knowledge intensive ones located in cities and larger towns, which rail is ideally placed to exploit. UTG considered the economic value of the railway in the north of England as against the need to develop cost cutting measures for the railway in 2014³¹.

7. The railway network is a system. We need a railway framework with aligned objectives, structures and organisational/commercial models

Self-evidently, the railway *network* is just that, a network – a system with inter-connecting and binding interfaces between track and train, hubs and spokes, systems and services. What happens to one part of the system can have an impact on another. Hence why the recent and much publicised delays to the Bolton corridor electrification scheme has had a knock on impact on rail capacity delivery in West Yorkshire, as diesel rolling stock has been needed elsewhere on the network. Another good example of how the separation of track and train accompanied by a decision-making framework that is not fit for purpose, is the delivery of the Northern

²⁹ http://www.urbantransportgroup.org/system/files/general-docs/A%20heavy%20load%20to%20bear_July%202014_FINAL.pdf

³⁰

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/4203/realising-the-potential-of-gb-rail-summary.pdf

³¹ http://www.urbantransportgroup.org/system/files/general-docs/The%20Economic%20Value%20of%20rail%20in%20the%20North%20of%20Englandv_FINAL_0.pdf

Hub. This programme, originally conceived by the Northern Way³², was always intended as a balanced **programme of investment in infrastructure and services**. Delivered together in a **systematic** way, there was a significant economic prize to be had. And yet what has ended up being delivered in infrastructure terms at least, is only part of the solution, most notably but not limited to the Ordsall Chord. What hasn't yet been delivered are either additional capacity on the Castlefield Corridor or additional platforms at Manchester Piccadilly, both of which are needed alongside the Ordsall Chord to make the whole programme work as a system. It therefore comes as no surprise that in May 2018 when the new timetable introduced more services through central Manchester, reliability and performance essentially collapsed. The fact that the railway's current governance was not able to plan for and mitigate this speaks to the heart of the challenge of the Review.

The structure of the industry is no longer fit for purpose in a congested and growing railway. The structure of railway privatisation was conceived in the early 1990s, and even then the fundamental structure (vertically integrated, versus the current model) was the subject of significant debate. This was conceived following a period of network contraction, and no-one anticipated the huge growth in demand that has since materialised. A busy railway requires much greater co-ordination (allocation of scarce resources) and a more coherent approach to planning for growth. The scope for meaningful inter-operator competition in this context is limited, and the contractual and commercial drivers of individual companies is very difficult to align with the need for precision co-ordination of operations at stations, depots and other constrained facilities. Major long-term investment (such as growing / replacing depots) requires investment that will have pay-back periods in excess of franchise horizons. Often key facilities are multi-user, so it is unclear who should lead resolving these issues; "everyone's problem is no-one's problem". Our umbrella body Urban Transport Group has produced 'Rail Cities UK'³³ – a vision for the kind of railway that our cities need, and has also demonstrated the kind of benefits and value for money that a joined-up, whole system approach to route modernisation can bring in its report 'The Transformational Benefits of Investing in Regional Rail'³⁴.

8. Rail franchising is not working for our region

We would argue that the more effective parts of the railway are not franchises. There are exceptions, but some of the most consistently high passenger satisfaction scores through the National Rail Passenger Survey³⁵ are for non-franchised operators. London Overground, Merseyrail and most UK light rail operations are operated on a

³²

http://www.transportforgreatermanchestercommittee.gov.uk/download/2773/manchester_hub_part_on_epdf

³³ http://www.urbantransportgroup.org/system/files/general-docs/UTG%20%20Rail%20Cities%20UK_FINAL%20WEB.pdf

³⁴ <http://www.urbantransportgroup.org/system/files/general-docs/The%20Transformational%20Benefits%20of%20Investing%20in%20Regional%20Rail.pdf>

³⁵ <https://www.transportfocus.org.uk/research-publications/research/national-passenger-survey-introduction/>

concession basis. The private sector is still operator appointed through competition, but the focus is on the efficiency of the operation to deliver the client's requirements. Capital investment and revenue risk and reward is with the client, allowing a much more long-term approach to investment decision making, and (arguably) a much better focus of management time. Franchising on the railway was intended to be light-touch, to maximise creativity and innovation. The nature of the busy railway network (where resources need allocating efficiently at a network-scale) and the way franchises are now let, means that there is little scope for such innovation.

As well as planning for the long term future looking to the arrival of HS2 and Northern Powerhouse Rail in our region, WYCA has in recent years focussed our efforts on working with other northern partners and the Department for Transport on the formation of Rail North, and the development of the specification for the relevant rail franchises for our region, namely Northern, Transpennine Express and Intercity East Coast. Collectively between northern partners and the Department for Transport, several million pounds of taxpayers' money has been spent on developing and letting these three franchises. On the face of it when the winning bidders were announced and franchise agreements signed, this appeared to be money well spent given the commitment of the winning companies to deliver significant improvements to rail services, including for West Yorkshire. Our region was to benefit from:

- More and faster services;
- More capacity;
- More destinations;
- New and improved rolling stock;
- Improvements to stations.

The above list is not exhaustive, however it demonstrates that following more than a decade of either no or limited investment, West Yorkshire and the wider north was to start seeing a change in its rail fortunes. It is therefore of the utmost concern to WYCA, that some of the most important committed franchise outputs in the new Northern franchise in particular, but also the former Virgin Trains East Coast one are currently at risk, or are at the very least being delivered late – these include:

- More frequent services between Leeds, Bradford, the Calder Valley, Manchester Airport and the North West;
- New direct connectivity between Bradford, South Yorkshire and the East Midlands;
- Additional capacity into Leeds;
- More frequent services between Leeds and Harrogate; and
- More frequent services between Bradford/Harrogate and London.

Whilst the franchises in question have already delivered and will undoubtedly deliver some of the committed improvements (albeit in some cases behind schedule), the fact that the above-mentioned critical franchise output examples are currently at risk, suggests there is something fundamentally wrong with rail franchising.

9. The railway needs to be accountable to democratically elected government at national and sub-national levels for rail outcomes

The industry is too fragmented and there is an absence of accountability. This is an oft-observed issue, and entirely predictable (it happens even within large organisations between departments). Operators often seek to assign responsibility of problems to other operators, Network Rail to operators and vice versa. In reality these are ‘railway issues’. The underlying commercial factors are insufficient to force a resolution. A structure that obscures accountability for poor decisions is unlikely to foster effective decision making – this is a clear message emerging from the reviews of the May 2018 timetable chaos. Major decisions are now often made by committee, where each individual party is incentivised to ‘toe the party line’, and / or adopt an optimistic attitude. Some such committees are chaired by DfT.

Devolution has been proven to be successful, where implemented properly³⁶. In the north of England there is currently a fairly limited amount of devolution, with the ultimate, key decisions being taken not by northern Leaders but by either the rail industry itself or senior officials in Whitehall. The Rail North Committee, comprising of City Region Mayors and Leaders, as well as Local Transport Authority Leaders across the north, has in recent months been presented several times now by the rail industry with what amounts to a ‘fait accompli’ in a number of its meetings. Whilst rail governance is the subject of another Review (Blake – Jones), it is vitally important that the Williams Review develops organisational frameworks that enable national **and** local, democratically elected politicians to make the key decisions associated with rail services and infrastructure that impact on them and their constituents. This does not mean politicians making detailed decisions on rail inputs, but on the outputs, outcomes and impact that they want the railway to deliver for the geography relevant to them.

Building on the need for devolution, it is also vitally important that there is absolute transparency for our society, for customers and for the rail industry, about who is accountable and for what as part of the rail industry structures. At present it is totally opaque to customers about who is ultimately responsible for resolving problems around poor service levels. Since the May 2018 timetable chaos, following unsatisfactory responses from the supposed customer facing parts of the rail industry, many customers in West Yorkshire have made contact with our local politicians and/or MPs to seek resolution to their complaints and poor service. And yet they currently do not hold the decision-making levers or responsibility.

10. The railway needs to be open for business

New rail infrastructure is unaffordable and often delayed. The rail industry has, in recent decades, been unable to reliably demonstrate an ability to deliver major projects efficiently (although there are some positive examples). This has been the case for many major projects since privatisation under both Railtrack and Network

³⁶ <http://www.urbantransportgroup.org/system/files/general-docs/UTG%20%E2%80%93%20Rail%20Devolution%20Works.pdf>

Rail, but has been particularly evident in recent years as the scale of network expansion has grown. By contrast, Network Rail appears to be very skilled and adept at quickly and effectively dealing with emergency works (reinstatement of Dawlish Sea Wall is a high profile example). Treasury is losing faith in the ability of the railway to effectively deliver major projects. Some suggest that Network Rail is not sufficiently incentivised to reduce cost. Some railway investment (most notably electrification) incurs significant capital cost on the infrastructure, but delivers equally significant operational cost savings for rail operators. However, the current structure breaks the logic of such investment.

Like many Combined Authorities, WYCA is a significant investor in the railway, with a current pipeline of investment worth £250m. And yet in general we find some parts of the rail industry very hard to do business with. Whilst we have seen some signs of improvement in recent months in working with Network Rail, we find:

- They are very risk averse;
- Are prone to preferential engineering making schemes unaffordable; and
- Are very reluctant to change any of the commercial terms in their template agreements. This means risk apportionment is very heavily weighted away from Network Rail towards us. It also means we have no control over cost escalation, essentially giving Network Rail a blank cheque.

Also, we struggle with some Train Operating Companies to secure their proactive involvement in some of our passenger critical investments. Arriva Rail North for example are simply not geared up to deal with third party enhancement schemes, to the extent that attending scheme development meetings can often be problematic.

11. Conclusion

WYCA warmly welcomes the Williams Review and would be pleased to work with the team to help shape its recommendations. It is a huge opportunity to re-shape and reset the organisational framework for our railway, to ensure it plays the vital role we need it to going forwards, for customers and for our society.

Appendix 2 – Swiss approach to measuring operating performance

Kundenpünktlichkeit

SBB CFF FFS

Key Performance Indices (KPIs) on Swiss railways: Passenger-weighted Arriving and Connectional Punctuality



Train arrives at a station. Passengers divide into 3 groups:

- **Through travellers** (stay on train)
- **Interchangers** (alight+change here)
- **Alighters** (destination is here)



Alighters are passengers who have reached their actual final destination at this station and are leaving the (SBB) network at this station. They are counted for the Passenger-weighted Arriving Punctuality (PAP) figure. The PAP measures the percentage of **alighters** who reach their destination punctually.

Interchangers change at this station to another train. They are only counted in order to calibrate the Passenger-weighted Connectional Punctuality (PCR) figure. The PCR measures the percentage of passengers who make their connection.

Source: SBB 2017, translated by WYCA

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Report to: Transport Committee

Date: 5 July 2019

Subject: **Local Cycling And Walking Infrastructure Plans**

Director: Alan Reiss, Director of Policy, Strategy and Communications

Author(s): Ambrose White

Is this a key decision?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	

1. Purpose of this report

- 1.1 To provide an update on the development of Local Cycling and Walking Infrastructure Plans (LCWIPs) and the plan to engage with stakeholders on draft LCWIPs. LCWIPs contribute to the region's overall objectives by encouraging more people to walk and cycle, improving health and contributing to cleaner air and lower emissions.

2. Information

Background

- 2.1 In January 2019, Transport Committee endorsed a phased approach to the development of LCWIPs in the region, which will help the Combined Authority and its partner councils prioritise future investment in walking and cycling infrastructure in West Yorkshire, enabling more people to walk and cycle for everyday journeys.
- 2.2 LCWIPs will help inform future investment in provision for cycling and walking, and forming part of a future connectivity pipeline across all modes of transport serving the Leeds City Region, as well as potentially helping to influence local

planning processes. Future investment in cycling and walking, informed by these LCWIPs, will build on the Combined Authority and its partner councils' delivery to date, and continue to deliver, in infrastructure provision and supporting behaviour change through the CityConnect programme and wider transport investment programmes in the region.

- 2.3 Investment in the cycling network in recent years through the Cycle City Ambition Grant (CCAG), accompanied by an extensive behaviour change programme, is already enabling more people to take up cycling and benefit from improved health through greater levels of physical activity.
- 2.4 Through the CCAG-funded CityConnect programme, we are delivering 39 kilometres of new joint use cycling and walking routes, and 28 kilometres of new cycling-specific routes, in partnership with our local authority and delivery partners, including the Leeds-Bradford Cycle Superhighway; canal towpath improvements across the region; the recently opened Canal Road Cycleway in Bradford; and the Scarborough Bridge improvement in York.
- 2.5 Where we have invested, we have seen increases in usage of these routes. A 26% increase has been recorded in people using the Cycle Superhighway between May and July 2018, compared to the same period in the previous year. Improvements to the Leeds-Liverpool Canal towpath lead to a 30% increase in use in these summer months in 2018 compared to 2016. Most recently, the £3 million improvements to create a fully accessible crossing as part of Scarborough Bridge in York has seen an extra 1,000 daily trips made by people on bike or on foot.
- 2.6 Between 2015 and 2020 we will have invested £60 million in cycling and walking infrastructure, and related behaviour change through the CityConnect programme. A further £12 million of Local Growth Fund is planned to be invested to deliver more cycling and walking schemes across the region, and business cases are being developed to secure this funding.
- 2.7 Investment in high quality routes also results in better perceptions of cycling and walking as ways of getting around. 61% of surveyed users of the Leeds-Bradford Cycle Superhighway say their confidence to cycle has increased as a result of the provision the superhighway now offers, with users citing being safe and segregated from traffic as the main reasons to use it. 30% of users of the Cycle Superhighway are new or returning to cycling and 81% use it between 3 or 5 days a week. Through increased physical activity, more people walking and cycling leads to health benefits not just in terms of physical health but also mental health. Our Cycling 4 Health pilot project, a cycle training course based on referrals from health services, led to over 50% of participants cycling more than once a week, and a third of participants feeling more confident and closer to people.

Progress to date

- 2.8 Since reporting in January, the Combined Authority's consultant has completed work to develop draft phase 1 LCWIPs for each partner council, focussing on

specific geographic areas as part of an initial phase of development. These areas of focus for walking are: Keighley town centre (Bradford district), Halifax town centre and Park Ward (Calderdale district), Dewsbury town centre (Kirklees district), Harehills Corner (Leeds), and Wakefield city centre. For cycle network development they are: south Bradford, Brighouse (Calderdale district), east Huddersfield, north east Leeds, and Wakefield city north and south corridors. These individual phase 1 LCWIPs will be combined into a single Plan for West Yorkshire, which will be subject to further phases of development.

- 2.9 More details of the areas of focus for the initial phase of LCWIP development identified by each partner council were reported to Transport Committee in January 2019. The work to develop the draft phase 1 LCWIPs has followed a process based on the government's technical guidance and agreed by partner council representatives on the LCWIP Programme Board. A summary of this process is provided in Appendix A.
- 2.10 Work to develop the phase 1 LCWIPs including the Cycling and Walking Network Maps and Programmes of Improvements has been undertaken in conjunction with partner council officers. Further input from wider stakeholders to seek views on the proposals emerging from the development work is now required. This will include those stakeholders involved in the workshop and street audit events held in November and December 2018, including local ward members, community organisations, accessibility groups, user group representatives and local authority officers.
- 2.11 Approaches to local stakeholder engagement are being planned by each partner council in conjunction with Combined Authority officers, to fit with local circumstances and arrangements already in place. The Combined Authority can offer support for this engagement, for example using the Your Voice portal to host the draft plans and key documents for comment. This engagement process is expected to take place in summer 2019, depending on individual partner council circumstances (for example, scheduling around other planned engagements and consultation).
- 2.12 At a West Yorkshire level, initial engagement has taken place with bus operators through the West Yorkshire Bus Alliance. Informal discussion with relevant lead officers from neighbouring authorities has also taken place to provide an update on progress and understand the potential for any interactions between the LCWIPs in West Yorkshire and those being developed in neighbouring authorities.
- 2.13 West Yorkshire and partner council officers have also been involved in national liaison events organised by government to bring together authorities from around England currently developing LCWIPs, to share knowledge, learning, and potential solutions to challenges identified as part of the process of developing LCWIPs. This provides the opportunity to help shape further refinements of the technical guidance produced by government on developing LCWIPs.

- 2.14 The improvements identified through the development of draft phase 1 LCWIPs for each partner council have been considered as part of the process to develop the Transforming Cities Fund (TCF) Stage 2 bid, where the areas of focus identified for the initial phase of LCWIP development align with the TCF corridors identified in the Stage 1 bid submitted in 2018.
- 2.15 An informal Members' Working Group on walking and cycling has been convened and the first meeting was held in February 2019. A verbal update on this will be provided at the Committee meeting. A schedule of future meeting dates and forward plan is being developed, pending confirmation of group membership as a result of changes to membership of Transport Committee following local elections in May 2019. Members of the group will be included in the stakeholder engagement process for partner council phase 1 LCWIP for their district area.
- 2.16 Approaches to potential adoption and integration of the phase 1 LCWIPs, and further development of the draft LCWIPs in subsequent phases will be agreed with partner councils. The resources available, experience and lessons gained to date through the development of the phase 1 LCWIPs will inform the approach to further development. The current position of each Local Authority with respect to their own adopted strategies and Local Plan development will be taken into account in determining an appropriate approach to adoption. Views on different approaches will also be sought at the next meeting of the Members' Working Group.
- 2.17 Given that the areas of focus covered in the initial phase of LCWIP development have covered only part of each partner council area, the approach to further phases of LCWIP development will take into consideration the amount of geographic coverage provided across West Yorkshire by this initial phase of development. Interaction between routes across administrative boundaries (both within West Yorkshire and with neighbouring regions) will be also considered as part of these further phases of development.

Next Steps

- 2.18 The draft LCWIPs to be the subject of stakeholder engagement will be circulated to members of Transport Committee for information. Stakeholder engagement on the draft phase 1 LCWIPs will now be undertaken, led by partner councils but based on a consistent approach to engagement, with additional support provided by the Combined Authority where required. Lists of stakeholders to be involved in the engagement process, building on those involved in the events held in 2018, are being developed by partner councils with input from the Combined Authority.
- 2.19 Costs associated with engagement are already included within the current budget for Strategic Cycle Network Development, funded through the Local Transport Plan Integrated Transport block programme (ITB) and Department for Transport (DfT) revenue funding secured for LCWIP development.

2.20 Following stakeholder engagement on the draft phase 1 LCWIPs, the plans will be updated to incorporate feedback received and be prepared for potential adoption based on the approach agreed with each partner council. A West Yorkshire-wide phase 1 LCWIP will be produced, combining the individual phase 1 LCWIPs, for potential endorsement by Transport Committee in November 2019 and subsequent adoption by the Combined Authority.

2.21 An approach will be agreed with partner councils to further development of the LCWIPs to provide wider geographic coverage across the region. Appropriate approaches to publication, adoption and integration of the draft phase 1 LCWIPs by each partner council and the Combined Authority will also be agreed with partners.

3. Financial Implications

3.1 There are no financial implications directly arising from this report.

4. Legal Implications

4.1 There are no legal implications directly arising from this report.

5. Staffing Implications

5.1 There are no staffing implications directly arising from this report.

6. External Consultees

6.1 No external consultations have been undertaken.

7. Recommendations

7.1 That the Committee notes the progress made on development of LCWIPs and the commencement of stakeholder engagement on the draft LCWIPs produced for each partner council.

8. Background Documents

Item 8: Local Cycling and Walking Infrastructure Plans (LCWIPs): Report to West Yorkshire Combined Authority Transport Committee, 11 January 2019

9. Appendices

Appendix 1 – WEST YORKSHIRE LCWIP DEVELOPMENT PROCESS

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Appendix 1: West Yorkshire Local Cycling and Walking Infrastructure Plans Development process

Stage 1: Determining Scope

Establish governance structure

Agree Geographic Areas of Focus based on background data

Produce **Scoping Report**

Stage 2: Gathering Information

Review background data

Stakeholder input through cycle network workshops and walking street audits

Produce **Background Report**

Stage 3: Network Planning Cycling

Identify and prioritise (1-2) **significant desire** lines
Identify **most direct and alternative alignments** for priority desire lines

Stage 4: Network Planning Walking

Identify **proposed network** and **classify routes** into and within Core Walking Zones, based on background data

Stage 5 – Prioritising Improvements

Identify **appropriate improvements** required within networks, scale of funding required to deliver

Draft phase 1 LCWIPs (Bradford, Calderdale, Kirklees, Leeds, Wakefield) incl. Cycling Network Map; Walking Network Map; Programmes of Improvements

Stakeholder Engagement and update

Seek stakeholder comment on draft phase 1 LCWIPs

Update draft phase 1 LCWIPs (previous event attendees + wider group)

Finalised phase 1 LCWIPs x 5

Stage 6: Adoption and Integration

Combined individual LCWIPs to form West Yorkshire phase 1 LCWIP

Agree approach to potential adoption by Local Authority and Combined Authority

Adopted phase 1 LCWIPs x 6

LCWIP – further development phases

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Report to: Transport Committee

Date: 5 July 2019

Subject: **Scrutiny Annual Report 2018/19 and statutory guidance**

Director: Angela Taylor, Director of Corporate Services

Author(s): Khaled Berroum, Scrutiny Officer

Is this a key decision?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	N/A

1. Purpose of this report

- 1.1 To present the Transport Committee with the scrutiny annual report which provides a summary and highlights of the work undertaken by the Overview and Scrutiny Committee during the 2018/19 municipal year.
- 1.2 To update the Transport Committee on new statutory scrutiny guidance issued by the government in May 2019 since the last meeting.

2. Information

Scrutiny Annual Report 2018/19

- 2.1 Earlier this year the Overview and Scrutiny Committee agreed to produce an annual report summarising the work it undertook this year.
- 2.2 The Scrutiny Annual Report 2018/19 is appended as **Appendix 1** and will be published on the Combined Authority website.

Statutory scrutiny guidance and review of scrutiny arrangements

- 2.3 At its 25 April 2019 meeting the Combined Authority expressed support for the intention to review the scrutiny arrangements to ensure they are in line with best practice nationally and to ensure compliance with expected new statutory scrutiny guidance.
- 2.4 That guidance has now been published as '[Overview and scrutiny: statutory guidance for councils and combined authorities](#)'¹ on 7 May 2019 and is attached as **Appendix 2**. The guidance was the government's response to the recommendations made by the House of Commons' Communities and Local Government Committee in a 2017 report entitled '[Effectiveness of local authority overview and scrutiny committees](#)'.
- 2.5 The guidance covers the following principal areas, which largely correspond with the areas the Overview and Scrutiny Committee identified as focuses for reviewing scrutiny in the last municipal year:
- Culture and mind-set
 - Resourcing for scrutiny
 - Selecting committee members
 - Power to access information
 - Work planning and engaging with the public
 - Evidence sessions
- 2.6 The new guidance explicitly applies to combined authorities for the first time and was issued under relevant legislation. Combined authorities are obligated to have regard to guidance in the way that they work and the decisions they make and any combined authority subject to the guidance must have a clear justifiable reason for departing from it. Scrutiny Standing Order 14 also obligates the Overview and Scrutiny Committee and the Combined Authority to have regard to any guidance issued by the Secretary of State.
- 2.7 The Centre for Public Scrutiny (CfPS) also intends to publish a longer and revised version of their 'Good Scrutiny Guide'² to take into account the new guidance and reflect changes in best practice since the last set of good practice guides were released – particularly for combined authorities.
- 2.8 The CfPS has also pledged to liaise closely with combined authorities through the existing Combined Authorities Governance Network (CAGN) and Local Government Association (LGA) to understand what changes combined authorities might make as a result of the new guidance.
- 2.9 A series of workshops with scrutiny members will now be arranged to discuss the contents of the guidance and the CfPS's planned refreshed 'good scrutiny guide' and make recommendations to the Overview and Scrutiny Committee, Combined Authority, the LEP and partner authorities as appropriate.

¹ <https://www.gov.uk/government/publications/overview-and-scrutiny-statutory-guidance-for-councils-and-combined-authorities>

² <https://www.cfps.org.uk/scrutiny-statutory-guidance-published-today/>

- 2.10 The Overview and Scrutiny Committee has already progressed some reforms to scrutiny arrangements this year as outlined in the annual report (**Appendix 1**) and intends to build upon them in the coming year. The Transport Committee will be kept updated as the review progresses.

3. Financial Implications

- 3.1 There are no financial implications directly arising from this report.

4. Legal Implications

- 4.1 There are no legal implications directly arising from this report.

5. Staffing Implications

- 5.1 There are no staffing implications directly arising from this report.

6. External Consultees

- 6.1 No external consultations have been undertaken.

7. Recommendations

- 7.1 That the Transport Committee notes the appended annual report summarising the work undertaken by the Overview and Scrutiny Committee in 2018/19 and provide any comments.
- 7.2 That the Transport Committee notes the new statutory scrutiny guidance issued by the government and the next steps.

8. Background Documents

Report: [Item 10 Corporate Matters](#) – West Yorkshire Combined Authority. 25 April 2019.

[‘Effectiveness of local authority overview and scrutiny committees’ – first report of the Communities and Local Government Committee in the Session 2017-19 \(15 December 2017\).](#)

[Government Response to the Committee’s First Report of 2017-19 \(6 March 2018\).](#)

[‘Overview and scrutiny: statutory guidance for councils and combined authorities’](#) (7 May 2019, Ministry of Housing, Communities and Local Government)

9. Appendices

Appendix 1 – Scrutiny Annual Report 2018/19

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Annual Report 2018/19

Overview and Scrutiny Committee

June 2019

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Introduction

This annual report provides a general summary of overview and scrutiny work undertaken during the 2018/19 municipal year and any conclusions and recommendations made.

What is 'Overview and Scrutiny'?

Overview and Scrutiny (shortened to scrutiny) acts as a check and balance to decision makers at the West Yorkshire Combined Authority, Leeds City Region Enterprise Partnership (the LEP) and their partners. It holds them to account for:

- the policies they adopt
- the money they spend
- the services they provide

Scrutiny **investigates, influences, reports and recommends** ways to strengthen policies, improve services, ensure best value for money and secure long-lasting positive outcomes for local people.

Although scrutiny does not have the power to make or block any decision of the Combined Authority (or the LEP), it does have the power to:

- 'call-in' decisions and make a case for them to be formally reconsidered or changed
- oblige the Combined Authority to respond to its recommendations publicly within two months
- require any member (or senior officer) of the Combined Authority to appear before it

All scrutiny work is led by an independent, politically-balanced group of elected councillors known as the Overview and Scrutiny Committee.

Membership 2018/19

Chair: Councillor Liz Smaje (Nov 2018 – present).

She took over from Councillor Robert Light (June 2015 – Nov 2018) in November 2018 when he stood down as a councillor to pursue new opportunities.

Members 2018/19

Bradford	Cllr Sarfraz Nazir Cllr Mike Pollard Cllr Rosie Watson
Calderdale	Cllr Stephen Baines Cllr James Baker Cllr Dot Foster
Kirklees	Cllr Paul Kane Cllr Robert Light (until Nov 2018) Cllr Marielle O'Neill Cllr Liz Smaje (From Nov 2018)
Leeds	Cllr Peter Harrand Cllr David Jenkins Cllr Denise Ragan
Wakefield	Cllr Glenn Burton Cllr Graham Isherwood Cllr Betty Rhodes
York	Cllr Jenny Brooks (Until March 2019) Cllr Ian Cuthbertson Cllr Helen Douglas (From March 2019) Cllr Tina Funnell

Chair's foreword

I would like to thank all members of the committee and all those who kindly gave evidence during the year.

As can be seen from the work programme and conclusions in this report, the issues considered by scrutiny this year covered a number of key areas including inclusive growth, grants to businesses and the corporate plan.

It is vital for good governance at the Combined Authority and the LEP that scrutiny is accepted as a "critical friend" and able to provide constructive feedback.

Going forward, we need to strengthen pre-decision scrutiny and continue to strive for best practice in line with newly published government guidance, so that scrutiny can continue to adapt to any future changes in the Combined Authority and the LEP.

I would also like to say a big thank you to my predecessor as chair, Robert Light. He chaired the committee during a time of major change for the Combined Authority and the LEP.

I echo the sentiments of scrutiny members who thanked him for his fair stewardship and willingness to engage all members in discussions and work planning.

As Chair, he oversaw the Committee's work on two major inquiries into the region's handling of the 2015 Boxing Day floods and the LEP's high profile loan to Oxford GB2 to build a hotel near Leeds Arena.



Councillor Elizabeth Smaje
Chair
Overview and Scrutiny Committee
2018/19



Work Programme 2018/19

Scrutiny determines its work programme at the beginning of each new municipal year in June when members choose which issues from previous years to revisit and those coming up in the year ahead they will need to look at more closely.

The Combined Authority and the LEP support scrutiny's work programming by outlining the key pieces of work and significant decisions planned or expected throughout the year.

Every year the Combined Authority and LEP agree a **Corporate Plan**¹ which outlines their ambitions and targets. In 2017 and 2018, the Combined Authority and the LEP committed themselves to three long term ambitions:

1. Enabling inclusive growth
2. Delivering 21st Century transport
3. Boosting productivity

A fourth objective to of supporting clean growth was added to the 2019/20 Corporate Plan.

As a result, this year scrutiny's work programme focused on a general theme of inclusivity. It looked into how long term inclusive outcomes and opportunities are being achieved by the Combined Authority and the LEP's economic and transport services, policies and projects, and where improvements could be made.

The work programme of the main committee and its working groups are outlined below and highlights from some of the key issues considered are explained in more detail in the following section.

¹ <https://www.westyorks-ca.gov.uk/media/3362/corporate-plan-18-19.pdf>

Summary of 2018/19 Work Programme

13 July 2018	<ol style="list-style-type: none"> 1. Policy Framework and Local Inclusive Industrial Strategy 2. Devolution
14 September 2018	<ol style="list-style-type: none"> 1. Ministerial review of LEPs 2. Business grants 3. Business planning and budget 2019/20 4. "West Yorkshire... and beyond – Calderdale Council's contribution to the Combined Authority"
16 November 2018	<ol style="list-style-type: none"> 1. Flood Review 2. Combined Authority's engagement with the public 3. Devolution
18 January 2019	<ol style="list-style-type: none"> 1. Assurance Framework 2. Apprenticeships 3. Inclusive growth 4. LEP merger 5. Draft budget 2019/20
22 March 2019	<ol style="list-style-type: none"> 1. Strategic transport priorities 2. Business grants criteria and inclusive growth
24 May 2019	<ol style="list-style-type: none"> 1. Corporate Plan 2019/20 and performance 2018/19 2. Annual Scrutiny Report 2018/19 3. Statutory scrutiny guidance

Working groups

To support its work this year, the Overview and Scrutiny Committee set up two working groups to focus on some LEP (economic) and transport issues separately.

	LEP Review working group	Transport working group
Members	Cllr Stephen Baines* Cllr Paul Kane Cllr Mike Pollard Cllr Rosie Watson	Cllr Ian Cuthbertson* Cllr Dot Foster Cllr Peter Harrand Cllr Denise Ragan
Topics	<ol style="list-style-type: none"> 1. LEP review / merger 2. Assurance Framework 3. Pre-decision scrutiny arrangements 4. Local Industrial Strategy 	<ol style="list-style-type: none"> 1. Transport related barriers to employment 2. Accessibility 3. Integrated ticketing 4. Rail performance

**Lead member*

2018/19 Highlights

This section outlines some highlights and contributions made by scrutiny in 2018/19.

Flood Review recommendations

Following the 2015 Boxing Day floods which severely affected West Yorkshire, scrutiny undertook a review of the flood events and how they were handled by the relevant authorities. Scrutiny concluded with ten recommendations which were accepted and included amongst the 19 recommendations in the 'Leeds City Region Flood Review'.

This year, scrutiny revisited those recommendations two years on and worked with Yorkshire Water and the Environment Agency to measure progress. The committee found that whereas progress had been made, there was still room for improvement.

Further conclusions included:

- There had been improvement in cooperation between the local authorities, the Environment Agency and the water sector compared to three years previously. The response to smaller flood events since 2016 had showed promise.
- The level of public and political spotlight which has been maintained since Boxing Day 2015 has been very encouraging. Previous flood events yielded only short term attention.
- Despite improvement in community engagement, education and public outreach through volunteer networks, use of flood wardens, and full time engagement staff, it was reported that many constituents remained unaware of them.
- There is evidence of a bigger focus on flooding in planning and policy making and those councils affected by the floods have created permanent flood partnerships, some of which are led by elected members.
- The Environment Agency, and other partners, should seek to provide comments more often, when possible, in planning applications to support flood resilience – even if a brief or standard response.
- Responsibility for funding flood resilience and mitigation efforts should be shared by developers if their developments affect existing flood risk levels. The cost is often passed onto the public and councils which are currently under financial stress.

Scrutiny will continue to monitor the progress in implementing the Leeds City Region Flood Review's recommendations.

Enabling inclusive growth

Business grants

The LEP oversees many business grants programmes which aim to achieve particular outcomes such as incentivising job creation, innovation and environmental sustainability. Scrutiny reviewed the performance and progress of inclusive growth outcomes arising from these programmes.

In 2018, the LEP Board decided to trial new application criteria designed to secure more inclusive growth outcomes for one of its business grants schemes– Business Growth Programme (BGP) – over a six month period.

The trial criteria included requirements to create Real Living Wage jobs and asked applicants to choose from commitments including undergoing energy audits, offering green travel options, paying suppliers as soon as possible, working with schools and supporting workers with disability and health issues.

Scrutiny recommended that this approach be extended to all current and future business grants programmes at all grant award levels.

In March 2019, following the conclusion of the first six months of the new inclusive growth application criteria, scrutiny reviewed the data and made further recommendations on how the criteria could be strengthened, including:

- Providing additional support to applicants who want to meet the stronger, more inclusive criteria such as employing people with disabilities
- Reducing the timescales within which businesses must commit to paying their suppliers to support smaller businesses

As some of the business grants programmes are due to end soon, scrutiny asked that outcome reports be produced for each grants programme upon their completion to allow scrutiny to better assess value for money and whether there have been, or likely to be, positive, long-lasting outcomes for local communities.

Apprenticeships

Scrutiny assessed the approach to supporting apprenticeships internally and externally between September 2018 and March 2019.

The Combined Authority does not fund, deliver or monitor apprenticeship training directly, but does encourage apprenticeship starts by supporting businesses through the bureaucracy involved in taking on apprentices (through its Employment Hub) and incentivising small and medium sized businesses (SMEs) to take on apprentices for the first time through the Apprenticeship Grants for Employers (AGE) programme.

Scrutiny's view is that responsibility for the success of apprenticeships should not be left solely with the training providers, OFSTED and employers, and that the Combined Authority should consider:

- What it can do to help support apprenticeships more broadly, through its existing services and when developing future service areas/programmes
- If it is in a position to at least monitor the quality of what training providers are delivering and engage with apprentices directly to influence and enable higher completion rates

It is also essential that the Combined Authority leads by example by recruiting and strongly supporting apprenticeships internally, as it cannot credibly promote externally what is not being achieved internally. Scrutiny welcomed the development of an internal staff development strategy and framework where apprenticeships feature as a key element.

Delivering 21st Century transport

Connecting people, places and policy

Scrutiny's Transport Working Group invited the Joseph Rowntree Foundation (JRF) to discuss their recent report², which used Seacroft (Leeds) and Dewsbury Moor (Kirklees) as case studies.

The report found that transport issues are a *“significant barrier to employment for many residents living in low-income neighbourhoods”* and *“are intimately related to the nature and location of employment”*.

Too many people in the region are not sufficiently connected to economic and educational opportunities. It was understood by all partners in the region that current connectivity links could be improved and that there was a lot of work to do.

Although the Combined Authority is not a planning authority and does not build and manage housing stock, scrutiny suggested that it could play a strategic role to enable sufficient alignment between housing, transport and skills strategies and policies amongst partner authorities in the region.

The Transport Working Group also concluded the following:

- There were some missed opportunities in local plans and planning where a site is allocated as employment but transport links are not properly considered. An example being land near the M62 motorway was designated as an employment site for distribution centres which employed low-paid staff on shifts. This was convenient for logistical distribution and delivery, but not for staff using public transport.
- Too many housing developments don't seem to take into account transport considerations or future trends. There could be better evidencing during the planning and appraisal stage of how developments will affect existing transport links or what kind of new transport links will be needed in the future, or based on demography.
- Developers could be required to invest in transport infrastructure or to subsidise bus services made necessary by their developments. In some cases, local authorities did not make enough use of existing statutory powers (such as Section 106 agreements) as a matter of deliberate policy or as a result of pressure from developers.
- In any case, there can be limited scope to compel fulfilment of Section 106 agreements in some cases. When planning permission is granted only with promises around transport investment, viability is often raised by developers as a problem and can then be used to avoid fulfilling agreements after permission is given.

The recently established West Yorkshire Bus Alliance, supported by the Combined Authority, has a priority to consider different models to redesign bus operations to better

² <https://www.jrf.org.uk/report/tackling-transport-related-barriers-employment-low-income-neighbourhoods>

deliver services to, and connect, all communities within the context of existing legislation on bus deregulation.

Digital inclusion and exclusion

Initial data shows that digital methods for paying for travel and accessing live travel information are becoming popular – but there are inequalities.

For example, the uptake of contactless payment on buses is around 40% in the higher income North Leeds areas, but only 5% in lower income South Leeds areas.

Digital innovations might improve reliability, service, patronage and efficiency but care must be taken not to leave people behind.

Many people still do not have or cannot afford bank accounts, suitable phones or reliable internet connections to take advantage of them. A 'digital by default' approach could disconnect many communities.

Scrutiny welcomed the Combined Authority's position, for instance, that a fully cashless system should not be put in place until a solution for current cash users is found and that issue is resolved.

Accessibility and mobility

Following a referral from a member of the public who informed scrutiny members of a local rail operator's policy of not allowing mobility scooters of a certain size on its trains, the Transport Scrutiny Working Group invited train operators and the Chair of the Transport Committee to look into the approach to accessibility and mobility.

Scrutiny found that there has been a lot of progress in transport accessibility, such as disability training becoming mandatory and more frequent for bus and train drivers. There are also special bookable services for people with disabilities run directly by the Combined Authority, such as AccessBus, which are well received.

However, scrutiny concluded that disabled people still face serious issues using public transport and they also suffer higher consequences with regards to the same issues that others do not.

The Combined Authority should take a lead in advocating on this issue through the existing Transport Operators Forum and Bus Alliance as part of its commitment to inclusivity.

Next steps in 2019/20

Next year, scrutiny will approach work programming in a workshop setting to allow for a more focused, strategic approach and a fuller look at the Combined Authority and the LEP's plans for the year ahead.

Improving scrutiny

This year the committee decided that, since the Combined Authority has changed noticeably since it was established four years ago and a dedicated scrutiny officer had now been appointed, the time was right to revisit and conduct a review of scrutiny arrangements – with a particular focus on:

- Resources and capacity
- Governance and working group arrangements
- Strategic work planning
- Public involvement in scrutiny
- Methods of scrutiny (eg 'scrutiny in the community', site visits)
- Involvement of external experts and stakeholders

The review would take into account and apply the new statutory scrutiny guidance³ issued by the government in May 2019.

Involvement of the public in scrutiny

In particular, the committee identified increasing the involvement of the public in the scrutiny process as a priority. Scrutiny committed to exploring the development of a communications and engagement plan to better:

- Increase scrutiny's profile, coverage and presence on existing websites and social media
- Engage and consult with the public to include their views and needs in work programming
- Identify and arrange site visits in the community when appropriate e.g. to flood affected areas when considering floods as an issue
- Arrange 'scrutiny in a day' sessions and conferences on important issues

Strengthening pre-decision scrutiny of projects

Another priority is the improvement of pre-decision scrutiny.

Following several workshops, the LEP Scrutiny Working Group recommended a new section in the Assurance Framework, which governs the process by which projects are

³ <https://www.gov.uk/government/publications/overview-and-scrutiny-statutory-guidance-for-councils-and-combined-authorities>

chosen and progressed, to ensure scrutiny is kept informed of projects in development before decisions are made.

“To support pre-decision scrutiny, officers will maintain a forward plan of projects in development and anticipate timescales and decision-point milestones and make this forward plan available to scrutiny members to review periodically on request.

Following the technical appraisal of business cases by case officers and subsequent consideration by the Programme Appraisal Team (PAT), officers will ensure that the relevant documents, information and analysis relating to each project can be made available to scrutiny members on request.

Schemes might be selected for further scrutiny based on a sectoral mix around cost, risk, complexity, aimed benefits or strategic value – as determined by the Committee's priorities and work programme. Scrutiny members could then look closer at a particular project or selection of projects.

Officers will support scrutiny members to have the opportunity to review projects, raise any concerns and ensure comments are reported and brought to the attention of decision making committees and officers prior to the approval and progression of projects through decision points.”

Extract from pp 24-25, Assurance Framework (March 2019)⁴

⁴<https://westyorkshire.moderngov.co.uk/ecSDDisplayClassic.aspx?NAME=Assurance%20Framework%202019&ID=363&RPID=762536&sch=doc&cat=13600&path=13600>

Find out more and get involved

Find out more about scrutiny at the Combined Authority and view agendas, reports and minutes, please visit the website here: <https://westyorks-ca.gov.uk/>

Scrutiny committee meetings take place in public and anyone is welcome to attend.

Get in touch

Scrutiny is keen to hear from members of the public on issues of concern in the West Yorkshire and York area that relate to the functions and responsibilities of the Combined Authority and Leeds City Region Enterprise Partnership (LEP).

You can contact scrutiny:

By email: scrutiny@westyorks-ca.gov.uk

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Report to: Transport Committee

Date: 5 July 2019

Subject: **Summary of Transport Schemes**

Director: Melanie Corcoran, Director of Delivery

Author(s): Craig Taylor / Cath Pinn

Is this a key decision?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:		

1 Purpose of this report

- 1.1 To inform the Transport Committee of the transport related West Yorkshire and York Investment Committee (the Investment Committee) recommendations from its meetings on 8 May 2019 and 11 June 2019.

2 Information

- 2.1 The recommendations not within the remit for Investment Committee approval for projects that were made by Investment Committee meetings in May and June 2019, were approved at the West Yorkshire Combined Authority (the Combined Authority) meeting on 27 June 2019.

The following projects were presented at the Investment Committee meeting on 8 May 2019 - Capital Spend and Project Approvals

- 2.2 The full agenda and papers for the Investment Committee meeting can be found on the Combined Authority [website](#).

Transport Hubs and Connecting Communities

- 2.3 The Transport Hubs Improvements and Public Transport Access schemes are a part of the Transport Hubs and Connecting Communities work stream of the Leeds Public transport Investment Programme (LPTIP).
- 2.4 The schemes will upgrade or create new facilities to improve the waiting environment and travel information offer, as well as enhancing connections within and between other public transport hubs and communities by improving walking and cycling links.

Garforth Rail Station Car Park Extension

- 2.5 The Garforth car park extension scheme is part of the rail park & ride programme - a programme of car park extensions on rail station land owned by Network Rail or district partners, to meet increased user parking demand and enhance connectivity to, from and within West Yorkshire.

The following projects were presented at the Investment Committee meeting on 11 June 2019 - Capital Spend and Project Approvals

- 2.6 The full agenda and papers for the Investment Committee meeting can be found on the Combined Authority [website](#).

Mirfield to Dewsbury to Leeds (M2D2L)

- 2.7 The Mirfield to Dewsbury to Leeds (M2D2L) corridor forms a Key Route running through the heart of West Yorkshire and serving a direct catchment of around 600,000 residents as well as several existing and planned major employment, retail and housing sites.
- 2.8 Initial work at this stage has identified a list of options which have forecasted values up to £37.250 million. Options include improvements to the highway including major and side-road junction upgrades, pedestrian crossings and footways, bus lanes and high quality stops, cycle tracks, and highway space reallocations.

South East Bradford Link Road (SEBLR)

- 2.9 The South East Bradford Link Road (SEBLR) will deliver an improved transport corridor via the construction of a new road to the east of Holme Wood and north of the A650 Westgate Hill Street. The corridor will support housing and regeneration targets by unlocking growth sites and improving access to Holme Wood. It will also help address congestion on existing routes and contribute to improved connectivity in south east Bradford and neighbouring areas. The scheme will encourage Public Transport usage in the corridor.

City Connect Phase 3 Leeds

2.10 The City Connect phase 3 programme builds on the work completed through phases 1 and 2, to develop a high quality, strategic, cycle and walking network to encourage more people to switch to travel by active modes, and make cycling the natural choice, especially for short journeys.

3 Financial implications

3.1 The report outlines for information expenditure from the available Combined Authority funding as recommended by Investment Committee.

4 Legal implications

4.1 The payment of funding to any recipient will be subject to a funding agreement being in place between Combined Authority and the organisation in question.

5 Staffing implications

5.1 A combination of Combined Authority and District partner project, programme and portfolio management resources are identified and costed for within the schemes in this report.

6 External consultees

6.1 Where applicable scheme promoters have been consulted on the content of this report.

7 Recommendations

7.1 To note the report.

8 Background documents

8.1 None.

9 Appendices

9.1 None.

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