Public Document Pack

Cabinet

Tuesday, 7th February, 2023
at 4.30 pm

PLEASE NOTE TIME OF MEETING

Council Chamber, Civic Centre

Members

Leader – Councillor Kaur
Deputy Leader and Cabinet Member for Health, Adults and Leisure – Councillor Fielker
Cabinet Member for Children and Leaning – Councillor Dr Paffey
Cabinet Member for Finance and Change – Councillor Leggett
Cabinet Member for Housing and Green Environment – Councillor Mitchell
Cabinet Member for Economic Development – Councillor Bogle
Cabinet Member for Transport and District Regeneration - Councillor Keogh
Cabinet Member for Safe City – Councillor Renyard
Cabinet Member for Communities and Customer Engagement – Councillor Kataria

(QUORUM – 3)

Contacts

Cabinet Administrator
Claire Heather
Tel. 023 8083 2412
Email: claire.heather@southampton.gov.uk

Director of Legal and Governance
Richard Ivory
Tel: 023 8083 2794
Email: richard.ivory@southampton.gov.uk

BACKGROUND AND RELEVANT INFORMATION

The Role of the Executive
The Cabinet and individual Cabinet Members make executive decisions relating to services provided by the Council, except for those matters which are reserved for decision by the full Council and planning and licensing matters which are dealt with by specialist regulatory panels.

The Forward Plan
The Forward Plan is published on a monthly basis and provides details of all the key executive decisions to be made in the four month period following its publication. The Forward Plan is available on request or on the Southampton City Council website, www.southampton.gov.uk

Implementation of Decisions
Any Executive Decision may be "called-in" as part of the Council's Overview and Scrutiny function for review and scrutiny. The relevant Overview and Scrutiny Panel may ask the Executive to reconsider a decision, but does not have the power to change the decision themselves.

Mobile Telephones – Please switch your mobile telephones or other IT to silent whilst in the meeting.

Use of Social Media
The Council supports the video or audio recording of meetings open to the public, for either live or subsequent broadcast. However, if, in the Chair's opinion, a person filming or recording a meeting or taking photographs is interrupting proceedings or causing a disturbance, under the Council's Standing Orders the person can be ordered to stop their activity, or to leave the meeting.
By entering the meeting room you are consenting to being recorded and to the use of those images and recordings for broadcasting and or/training purposes. The meeting may be recorded by the press or members of the public.
Any person or organisation filming, recording or broadcasting any meeting of the Council is responsible for any claims or other liability resulting from them doing so. Details of the Council's Guidance on the recording of meetings is available on the Council's website.

Municipal Year Dates (Tuesdays)

2022	2023
14 June	17 January
19 July	7 February
16 August	21 Feb (budget)
13 September	14 March
18 October	18 April
15 November	

Executive Functions
The specific functions for which the Cabinet and individual Cabinet Members are responsible are contained in Part 3 of the Council's Constitution. Copies of the Constitution are available on request or from the City Council website, www.southampton.gov.uk

Key Decisions
A Key Decision is an Executive Decision that is likely to have a significant:

- financial impact (£500,000 or more)
- impact on two or more wards
- impact on an identifiable community

Procedure / Public Representations
At the discretion of the Chair, members of the public may address the meeting on any report included on the agenda in which they have a relevant interest. Any member of the public wishing to address the meeting should advise the Democratic Support Officer (DSO) whose contact details are on the front sheet of the agenda.

Fire Procedure – In the event of a fire or other emergency, a continuous alarm will sound and you will be advised, by officers of the Council, of what action to take.

Smoking policy – The Council operates a no-smoking policy in all civic buildings.

Access – Access is available for disabled people. Please contact the Cabinet Administrator who will help to make any necessary arrangements.

Southampton: Corporate Plan 2022-2030 sets out the four key outcomes:

- Communities, culture & homes - Celebrating the diversity of cultures within Southampton; enhancing our cultural and historical offer and using these to help transform our communities.
- Green City - Providing a sustainable, clean, healthy and safe environment for everyone. Nurturing green spaces and embracing our waterfront.
- Place shaping - Delivering a city for future generations. Using data, insight and vision to meet the current and future needs of the city.
- Wellbeing - Start well, live well, age well, die well; working with other partners and other services to make sure that customers get the right help at the right time

20 December	

CONDUCT OF MEETING

TERMS OF REFERENCE
The terms of reference of the Cabinet, and its Executive Members, are set out in Part 3 of the Council's Constitution.

BUSINESS TO BE DISCUSSED
Only those items listed on the attached agenda may be considered at this meeting.

RULES OF PROCEDURE
The meeting is governed by the Executive Procedure Rules as set out in Part 4 of the Council's Constitution.

QUORUM
The minimum number of appointed Members required to be in attendance to hold the meeting is 3.

DISCLOSURE OF INTERESTS
Members are required to disclose, in accordance with the Members' Code of Conduct, ***both*** the existence ***and*** nature of any "Disclosable Pecuniary Interest" or "Other Interest" they may have in relation to matters for consideration on this Agenda.

DISCLOSABLE PECUNIARY INTERESTS
A Member must regard himself or herself as having a Disclosable Pecuniary Interest in any matter that they or their spouse, partner, a person they are living with as husband or wife, or a person with whom they are living as if they were a civil partner in relation to:
(i) Any employment, office, trade, profession or vocation carried on for profit or gain.
(ii) Sponsorship:
Any payment or provision of any other financial benefit (other than from Southampton City Council) made or provided within the relevant period in respect of any expense incurred by you in carrying out duties as a member, or towards your election expenses. This includes any payment or financial benefit from a trade union within the meaning of the Trade Union and Labour Relations (Consolidation) Act 1992.
(iii) Any contract which is made between you / your spouse etc (or a body in which the you / your spouse etc has a beneficial interest) and Southampton City Council under which goods or services are to be provided or works are to be executed, and which has not been fully discharged.
(iv) Any beneficial interest in land which is within the area of Southampton.
(v) Any license (held alone or jointly with others) to occupy land in the area of Southampton for a month or longer.
(vi) Any tenancy where (to your knowledge) the landlord is Southampton City Council and the tenant is a body in which you / your spouse etc has a beneficial interests.
(vii) Any beneficial interest in securities of a body where that body (to your knowledge) has a place of business or land in the area of Southampton, and either:

a) the total nominal value of the securities exceeds £25,000 or one hundredth of the total issued share capital of that body, or
b) if the share capital of that body is of more than one class, the total nominal value of the shares of any one class in which you / your spouse etc has a beneficial interest that exceeds one hundredth of the total issued share capital of that class.

Other Interests
A Member must regard himself or herself as having an, 'Other Interest' in any membership of, or occupation of a position of general control or management in:
Any body to which they have been appointed or nominated by Southampton City Council
Any public authority or body exercising functions of a public nature
Any body directed to charitable purposes
Any body whose principal purpose includes the influence of public opinion or policy

Principles of Decision Making
All decisions of the Council will be made in accordance with the following principles:-

- proportionality (i.e. the action must be proportionate to the desired outcome);
- due consultation and the taking of professional advice from officers;
- respect for human rights;
- a presumption in favour of openness, accountability and transparency;
- setting out what options have been considered;
- setting out reasons for the decision; and
- clarity of aims and desired outcomes.

In exercising discretion, the decision maker must:

- understand the law that regulates the decision making power and gives effect to it. The decision-maker must direct itself properly in law;
- take into account all relevant matters (those matters which the law requires the authority as a matter of legal obligation to take into account);
- leave out of account irrelevant considerations;
- act for a proper purpose, exercising its powers for the public good;
- not reach a decision which no authority acting reasonably could reach, (also known as the "rationality" or "taking leave of your senses" principle);
- comply with the rule that local government finance is to be conducted on an annual basis. Save to the extent authorised by Parliament, 'live now, pay later' and forward funding are unlawful; and
- act with procedural propriety in accordance with the rules of fairness.

AGENDA

1 APOLOGIES

To receive any apologies.

2 DISCLOSURE OF PERSONAL AND PECUNIARY INTERESTS

In accordance with the Localism Act 2011, and the Council's Code of Conduct, Members to disclose any personal or pecuniary interests in any matter included on the agenda for this meeting.

EXECUTIVE BUSINESS

3 STATEMENT FROM THE LEADER

4 RECORD OF THE PREVIOUS DECISION MAKING (Pages 1 - 4)

Record of the decision making held on 17th January 2023, attached.

5 MATTERS REFERRED BY THE COUNCIL OR BY THE OVERVIEW AND SCRUTINY MANAGEMENT COMMITTEE FOR RECONSIDERATION (IF ANY)

There are no matters referred for reconsideration.

6 REPORTS FROM OVERVIEW AND SCRUTINY COMMITTEES (IF ANY)

There are no items for consideration

7 EXECUTIVE APPOINTMENTS

To deal with any executive appointments, as required.

ITEMS FOR DECISION BY CABINET

8 ADMISSIONS ARRANGEMENTS FOR COMMUNITY AND VOLUNTARY CONTROLLED SCHOOLS 2024/25 □ (Pages 5 - 32)

Report of the Cabinet Member for Children and Learning detailing the Admissions Arrangements for Community and Voluntary Controlled Schools 2024/25.

9 SOUTHAMPTON FESTIVALS AND EVENTS STRATEGY □ (Pages 33 - 74)

Report of Cabinet Member for Culture detailing Southampton Festivals and Events Strategy.

10 **TRANSPORT FOR THE SOUTH-EAST - STRATEGIC INVESTMENT PLAN** (Pages 75 - 214)

Report of the Cabinet Member for Transport and District Regeneration.

11 **WATER PROCUREMENT CONTRACT APRIL 2023** (Pages 215 - 220)

Report of the Cabinet Member for Economic Development detailing Water Procurement Contract April 2023.

Monday, 30 January 2023 Director of Legal and Governance

This page is intentionally left blank

SOUTHAMPTON CITY COUNCIL
EXECUTIVE DECISION MAKING

RECORD OF THE DECISION MAKING HELD ON 17 JANUARY 2023

Present:

Councillor Kaur	- Leader of the Council
	- Cabinet Member for Children and Learning
	- Cabinet Member for Economic Development
	- Cabinet Member for Health, Adults and Leisure
	- Cabinet Member for Finance and Change
	- Cabinet Member for Communities and Customer Engagement
	- Cabinet Member for Transport and District Regeneration
	- Cabinet Member for Housing and Green Environment
	- Cabinet Member for Safe City

47. EXECUTIVE APPOINTMENTS

The following Executive Appointment was made:-

Renaissance Board (Master Planning Framework) – Councillors Kaur, Bogle and Moulton.

48. PROPOSED EXPANSION TO NEWLANDS PRIMARY SCHOOL

DECISION MADE: (CAB 22/23 35775)

On consideration of the report of the Cabinet Member for Children and Learning, Cabinet agreed the following:

(i) To approve the virement of £0.66M within the Children & Learning Capital Programme to enable the project to progress to delivery as detailed in paragraphs 10, 11 and 12. ,
(ii) To approve the spend of £0.66M in 2023/24.
(iii) Cabinet notes that use of government grant funding of £0.66M towards the increased costs of this scheme, as outlined in paragraph 12, means it will not be available to reduce borrowing costs for other schemes. Therefore applying in this way does not help offset the considerable budget pressures the authority currently faces.

49. COMMERCIAL WASTE DISPOSAL

DECISION MADE: (CAB 22/23 35956)

On consideration of the report of the Cabinet Member for Finance and Change, Cabinet agreed the following:

(i) To approve an extension to the existing Agreement with the Provider for two years from April 2023 to March 2025.
(ii) To delegate authority to the Head of Supplier Management to take the necessary actions to give effect to this decision.

50. GROUP BUS FARE OFFER

DECISION MADE: (CAB 22/23 35853)

On consideration of the report of the Cabinet Member for Transport and District Regeneration, Cabinet agreed the following:

(i) To delegate authority to the Executive Director of Place, following consultation with the Cabinet Member for Transport and District Regeneration to determine the mechanism to set up and administer the Group Fare Offer and £1 Evening Fares for 2022/23, and if continued, in 2023/24.
(ii) To note the context of the financial challenges the Council currently faces, as set out in paragraph 13 of the report.

51. APPLICATION FOR THE DESIGNATION OF CIVIL ENFORCEMENT AREA FOR MOVING VIOLATIONS

DECISION MADE: (CAB 22/23 35961)

On consideration of the report of the Cabinet Member for Transport and District Regeneration, Cabinet agreed the following:

(i) That the Council submit an application for the designation of civil enforcement area for moving violations.
(ii) To delegate to the Head of Service Transport and Planning approval to consult on and implement future sites following consultation with the Executive Director – Finance and Commercialism and the Cabinet Member for Transport and District Regeneration.

52. SCC EMPLOYER CONTRIBUTION

DECISION MADE: (CAB 22/23 35961)

On consideration of the report of the Cabinet Member for Finance and Change, Cabinet agreed the following:

(i) Approve SCC taking the option of the lower contribution rate of

16.8% in order to generate an annual budget saving to the General Fund of around £1.44M.

(ii) Notes the option of an upfront payment to Hampshire Pension Fund as outlined in paragraphs 8 and 9 and that a decision will be taken by the Executive Director for Finance and Commercialisation, based on whether the estimates of the upfront payment discount offered benefits the Council more than the cash flow costs of borrowing to make the early payment.

53. SOUTHAMPTON GUILDHALL

DECISION MADE: (CAB 22/23 35967)

On consideration of the confidential report of the Leader, Cabinet agreed the recommendation as contained in the report.

Recommendation as contained in the confidential report approved.

This page is intentionally left blank

DECISION-MAKER:	CABINET
SUBJECT:	ADMISSIONS ARRANGEMENTS FOR COMMUNITY AND VOLUNTARY CONTROLLED SCHOOLS 2024-25
DATE OF DECISION:	7 FEBRUARY 2023
REPORT OF:	**COUNCILLOR PAFFEY** **CABINET MEMBER FOR CHILDREN AND LEARNING**

CONTACT DETAILS				
Executive Director	**Title**	Executive Director Wellbeing (Children & Learning)		
	Name:	**Robert Henderson**	Tel:	023 8083 4899
	E-mail	**Robert.henderson@southampton.gov.uk**		
Author:	**Title**	**Admissions and School Place Planning Manager**		
	Name:	**Zoe Snow**	Tel:	023 8083 2713
	E-mail	Zoe.snow@southampton.gov.uk		

STATEMENT OF CONFIDENTIALITY		
N/A		
BRIEF SUMMARY		
All schools must have an admissions policy which lays out criteria for how they will decide which children secure places if more children apply than the school has spaces available for. Southampton City Council is the admissions authority for the Community and Voluntary Controlled schools in the city.		
For 2024 admissions, the Council are proposing no changes from the 2023 arrangements..		
RECOMMENDATIONS:		
	(i)	To approve the Admissions Policies, the Published Admission Numbers (PANs) and the Supplementary Information Form (SIF) for Community and Voluntary Controlled schools and the schemes for coordinating Infant-Primary, Junior and Secondary admissions for the school year 2024-25 as set out in appendices 1 to 6.
	(ii)	To authorise the Executive Director - Wellbeing, Children and Learning to take any action necessary to give effect to the admissions policies and to make any changes necessary to the admissions policies where required to give effect to any Acts, Regulations or revised Schools Admissions or School Admissions Appeals Codes or binding Schools Adjudicator, Court or Ombudsman decisions whenever they arise.
REASONS FOR REPORT RECOMMENDATIONS		
1.	As a requirement of the Admissions Code 2021, all admission authorities must determine their admission arrangements by 28th February of the determination year. For 2024 entry, the determination year is 2023.	

ALTERNATIVE OPTIONS CONSIDERED AND REJECTED	
2.	To take no action. Rejected as would leave Southampton City Council remiss in its statutory duties.
DETAIL (Including consultation carried out)	
3.	The principles of Southampton's Admission Policies are well established. They seek to fulfil the requirement to be "fair, clear and objective" (School Admissions Code 2021). The proposed policies seek to make this process as transparent as possible. In particular they enable the Local Authority, Schools, and parents: a) To protect the rights of vulnerable children. b) To meet significant medical or psychological needs of individual children. c) To develop, strengthen and support immediate family ties. d) To develop and strengthen links between designated feeder and receiver schools. To have access to reasonable, clear, objective, procedurally fair criteria that avoid ambiguity in the interpretation of the policy.
4.	Apart from required changes of dates and wording changes for clarity, there are no material changes to the coordinated schemes for Infant-Primary, Junior or Secondary transfers, nor to the Supplementary Information Form (SIF).
5.	A full consultation on the policies and arrangements was conducted in the determination of the policies for 2022-23. New consultation is only required in the instance of material changes, or if no such consultation has been held in seven years, and so has not been undertaken for 2024-25, as neither consideration is present.
RESOURCE IMPLICATIONS	
Capital/Revenue	
6.	There are no additional revenue costs arising directly from the approval of the admission policies for the school year 2024-25.
Property/Other	
7.	N/A
LEGAL IMPLICATIONS	
Statutory power to undertake proposals in the report:	
8.	The Education Acts, Regulations made pursuant to them and the School Admissions Code (2021) require Local Authorities to formulate coordinated schemes for dealing with applications to Infant-Primary, Junior and Secondary schools at the relevant age of transfer. Such schemes also include admission to schools where the Local Authority is not the Admission Authority i.e. Voluntary Aided, Foundation, Free Schools and Academies. The schemes must ensure that every parent is notified of one offer of a school place on the same day. A National Offer date of 1 March, or first working day thereafter, has been set for Secondary admissions and a National Offer date of 16 April, or first working day thereafter, for Primary sector admissions. The regulations also set National closing dates for applications of 31 October in the offer year

	for Secondary applications and 15 January in the offer year for Primary sector applications.
9.	Admission Arrangements must be fully compliant with the Human Rights Act 1998 and the Equalities Act 2010. The Council's proposed Admission Arrangements meet the legislative requirements.
Other Legal Implications:	
10.	None.
RISK MANAGEMENT IMPLICATIONS	
11.	The recommendation to agree these arrangements presents no financial risk. The proposals anticipate no changes to the current financial envelope.
12.	The recommendation presents no risks to the current service delivery.
POLICY FRAMEWORK IMPLICATIONS	
13.	None.

KEY DECISION?	**Yes**
WARDS/COMMUNITIES AFFECTED:	All

SUPPORTING DOCUMENTATION

Appendices

1.	SCC Inf-Primary Admissions Policy 2024-25
2.	SCC Junior Admissions Policy 2024-25
3.	SCC Supplementary Information Form
4.	SCC Infant-Primary Coordinated Scheme
5.	SCC Junior Coordinated Scheme
6.	SCC Secondary Coordinated Scheme

Documents In Members' Rooms

1.	N/A

Equality Impact Assessment

Do the implications/subject of the report require an Equality and Safety Impact Assessment (ESIA) to be carried out.	**No**

Data Protection Impact Assessment

Do the implications/subject of the report require a Data Protection Impact Assessment (DPIA) to be carried out.	**No**

Other Background Documents

Other Background documents available for inspection at:

Title of Background Paper(s)		**Relevant Paragraph of the Access to Information Procedure Rules / Schedule 12A allowing document to be Exempt/Confidential (if applicable)**
1.	N/A	

SOUTHAMPTON
CITY COUNCIL

Southampton City Council

Admission Policy for Community and Voluntary Controlled Infant and Primary Schools for 2024/25

Southampton City Council is the admission authority for all Community and Voluntary Controlled Infant and Primary schools in the city. As required in the School Admissions Code the authority will consider all on-time preferences at the same time for September 2024 admissions.

Parents may express up to three (3) preferences, listing them in the order in which they would accept them. All preferences will be considered and where more than one school could be offered, the parents will be offered a place for their child at the higher ranked of the schools on their application.

The Infant and Primary Schools covered by this policy are listed below, with their Published Admission Number (PAN). This is the number of children the school will admit in September 2023.

School	Year R PAN
Bitterne C of E (VC) Primary School	60
Bitterne Park Primary School	90
Fairisle Infant and Nursery School	90
Mansel Park Primary School	60
Mason Moor Primary School	30
Newlands Primary School	60
Oakwood Primary School	60
Redbridge Primary School	30
Shirley Warren LC Primary and Nursery School	60
Sinclair Primary and Nursery School	30
St Mary’s CofE (VC) Primary School	60
Valentine Primary School	90

*At the time of publication, the schools listed above were using the SCC Admissions Policy and appropriate PAN. Please note that this list is subject to change. The Council website has the most up to date information on school status (academisation etc.) and amendments to PANs that may have taken place in accordance with admissions legislation or school organisation decisions since publication.

Children with Education, Health and Care Plans (EHCP) that name a school

Children with Education, Health and Care Plans (EHCPs) that name a school must be admitted to that school under the Education Act 1996 and with regard to the SEND Code of Practice. These children will be admitted to the named school, even if it is full, and are therefore outside the normal admission arrangements. As required by the Admissions Code, these children will count as part of the Published Admission Number (PAN) for the school.

Oversubscription criteria

Applications submitted by 15 January 2024 will be dealt with first. If the number of applications submitted by 15 January 2024 is greater than the PAN for a school, admissions to the school will be decided according to the following priorities:

1. Children who are currently, or have previously been in care (Looked After and Previously Looked After Children) as defined by the Admissions Code 2021

2. Children subject to a Child Protection Plan or deemed to be vulnerable by a senior officer with responsibility for safeguarding in Southampton City Council

3. Children who have a sibling on the roll of the school that will continue to attend that school for the following year

4. Children whose parents have satisfied the Local Authority that their child has a significant medical or psychological condition which means they must attend the preferred school rather than any other

5. Children who qualify for the Service Premium, as the child of a member of the Armed Forces

6. Children who live within the school's designated catchment area

7. Children whose parents are applying for their child to attend a Church of England voluntary controlled school on denominational grounds

8. Children who live closest to the school

Should a school be oversubscribed from within any of the criteria, then distance, as defined by this policy, will be used to prioritise applications within these categories. Should there be two or more identical distances requiring prioritisation, this will be done by casting lots. Lots will be drawn by the Divisional Head of Education and Learning at Southampton City Council.

Late Applications

The closing date for applications is 15 January 2024. Applications received after that date will be late applications and will dealt with after all on time applicants have been offered a school place. If a school has places available after admitting all on-time applications, late applications will be considered in accordance with the priorities set out above.

Waiting Lists

If a place cannot be offered at a higher ranked Community or Voluntary Controlled school, unsuccessful applicants will automatically be placed on the waiting list for the school. If places become available, children on the waiting list will automatically be offered them according to the priorities set out above and any previous offer of a school place will be withdrawn.

The length of time on the waiting list cannot be taken into account. Unsuccessful late applications will be treated in the same way as unsuccessful on time applications and placed on the waiting list according to the priorities set out above. This means that waiting lists will be re-ranked after every new expression of preference.

Waiting lists will be held until 31 July 2025. Any parent wishing to remain on the waiting lists after this date will need to make a new in-year application to the school.

Unplaced Children

Any child who remains unplaced after their application has been processed, because they could not be offered a place at any school requested, will be offered a place at their catchment school if there is one and if places are still available. If there are no places available at their catchment school, they will be allocated a place at the nearest school to their home address with places available.

In-Year Admission

Admissions mid-year for any year group will be dealt with in accordance with this policy.

Definitions

Previously/Looked After Child: Looked After Children are Children who are in the care of local authorities as defined by Section 22 of the Children Act 1989. In relation to school admissions legislation a 'looked after child' is a child in public care at the time of application to a school. A Previously Looked After Child, as defined by the Admissions Code, is one who was: looked after, but ceased to be so because they were adopted (or became subject to a child arrangements order or special guardianship order), including those children who appear (to the admission authority) to have been in state care outside of England and ceased to be in state care as a result of being adopted.

Sibling: This includes children living as siblings in the same family unit. In the case of applications for places at infant schools a sibling at the linked junior school will count as a sibling at the infant school. A sibling is defined as a brother or sister including half, step, foster or adoptive brother or sister, living within the same family unit at the same address.

Catchment Area: A "designated catchment area" for a school is the area set out in the definitive catchment area map for each school. This map is held by Southampton City Council, Civic Centre, Southampton SO14 7LY. A schedule of addresses, to be read in conjunction with the map, is also kept by the Council. Parents wishing to know if their address is in a particular catchment area can contact the Admissions Team, or log on to the council website www.southampton.gov.uk, click on "My Southampton", follow the links, and enter their postcode.

Service Premium: A child will qualify for the Service Premium if their circumstances satisfy any of the following:

- one of their parents is serving in the regular armed forces (including pupils with a parent who is on full commitment as part of the full time reserve)

- one of their parents died whilst serving in the armed forces and the pupil receives a pension under the Armed Forces Compensation Scheme or the War Pensions Scheme

Proof of this criteria may be provided in a letter from the service parent's commanding officer, confirming employment, or evidence of the receipt of a service pension.

Denominational Grounds: Evidence of regular church attendance at services held by the Church of England or a local ecumenical partnership (as defined in the school's prospectus) must be certified by the vicar or someone else of authority in the church, using the Local Authority's Supplementary Information Form (SIF) which can be found on the council website, alongside this policy.

"Regular" is defined as "attending worship services at a Church of England church or local ecumenical partnership at least twice a month for the previous two years before the deadline for admissions set by Southampton City Council."

'Christian fellowship' is defined as 'a worshipping fellowship who confess the Lord Jesus Christ as God and Saviour according to the Bible and therefore seek to fulfil together their common calling to the glory of the one God, Father, Son and Holy Spirit; who are members or participant observers of the World Council of Churches of the World Evangelical Alliance.'

Distance: Distances are measured based on the shortest walking distance using public roads and footpaths. Distances are measured from home to school for all children. These are calculated using a computerised mapping system that uses data supplied by Ordnance Survey. Distances are measured from the point designated in the system as the home address to the point designated in the system as the mid-point of the nearest open pedestrian gate to the school, using public roads and footpaths considered safe for children to traverse.

Entry into Year R

The offer made to parents for reception class on the initial offer date is of a full-time place from the start of term after 1 September 2024. Schools normally wish to stagger entry into school from that date and arrange for some initial part time attendance to ensure a smooth transition from pre-school / home into school.

Flexibilities exist for those parents who do not feel that their child is ready to start school in the September following their fourth birthday. It is possible for them to access:

- Part-time admission to the allocated school from the September following their child's fourth birthday. This should be discussed with the headteacher of the allocated school.

- Defer their child's entry until later in the school year but not beyond the point at which they reach Compulsory School Age, and not beyond the beginning of the final term of the school year. This should be discussed with the headteacher of the allocated school.

- Defer their child's entry until the September following their fifth birthday. Parents must make an in-year application and the pupil would start in Year 1.

Parents of summer-born children, that is children born between 1 April and 31 August, may, in addition, choose to send their child to school in the September following their 5th birthday and may request that their child is admitted out of their normal age group to Reception Year rather than Year 1. Any parent wishing to request for their summer-born child to start school outside their normal age group should submit this via the online form available on the Southampton City Council website.

For all requests it is vital to understand that at each transition (starting reception, moving from infant to junior, primary to secondary, secondary to college) the decision whether to maintain the placement in a younger or older year group must be made by the admission authority for the school. As such, there is no guarantee that it will continue throughout the child's education and a new parental request must be made before each transition. As a general rule, requests should only be made once per phase transfer, unless there has been a significant change in circumstances.

One admission authority cannot be required to honour a decision made by another admission authority on education out of normal age group.

Southampton City Council

Coordinated Scheme for Entry into Reception Year at Infant and Primary Schools for the 2024/25 Academic Year

This scheme details the coordinated admission arrangements for Reception Year entry into infant and primary schools in Southampton in September 2024, in accordance with the School Admissions (Co-ordination of Admission Arrangements) (England) Regulations 2008 and the School Admissions Code (2021).

This scheme details the mechanisms for the process of 'mainround' admission into Reception Year, including the process of application, offering of school places and the provision for late applications. It is enacted to ensure that all on-time applicants receive an offer of one school place on the National Offer Day of 16th April 2024.

The scheme incorporates all state-funded schools within the Southampton City Council boundary, including foundation/trust schools and academies who may be their own admission authorities.

This scheme has been separated into the following sections:

1. Data Capture
2. Application Process
3. Closing Date
4. Processing of On-Time Applications
5. Outcome of Applications
6. Data to Schools
7. Late Applications

1. Data Capture

In July 2023, the Admissions Team at Southampton City Council will compile a list of children who will be eligible for a school place in September 2024. This will be completed by identifying those children who are registered at Early Years settings across the city and expanded by data from the Southampton City Primary Care Trust (SCPCT).

While applying for a school place and seeking information on this process is ultimately the responsibility of parents and carers, Southampton City Council recognise that this can be a complex process, especially for first-time parents, and seek to support wherever possible. To that end, between July and October 2023, the Admissions Team will send out information to all families identified in the data capture to inform them of the school application process, as well as working with Early Years settings and schools to offer opportunities for support.

2. Application Process

Individual school admissions policies will be published on the schools' websites from 15th March 2023. A composite prospectus, compiling the policies of all schools within the

Southampton City Council boundary will be published on the Council website no later than 12th September 2023. A hard copy of this composite prospectus is available upon request.

Parents must apply for a school place via the Local Authority for the area where they live, even if they wish to apply for schools within another Local Authority (i.e. Southampton City Council residents must apply to Southampton City Council, even if they are applying to schools within the Hampshire County Council boundary).

Applications are made, with limited exception, online via the Southampton City Council Citizen's Portal. Parents must register an account to use the system. The Citizen's Portal is provided by Capita PLC and any system downtime for maintenance is outside of the control of Southampton City Council but will naturally avoid closing and offer dates.

Online applications for Reception places will open on 4th September 2023.

3. Closing Date

The national closing date for Reception Year applications is 15th January 2024. Applications can be submitted until 23:59 on this date.

4. Processing of On-Time Applications

As per the requirements of the School Admissions Code 2021, Southampton City Council operates an 'equal preference' system, meaning that all preferences expressed on an application are treated as applications to those schools and processed at the same time.

If an application cites a preference for an own admission authority school that completes its own ranking, this information will be sent to the school by 22nd February 2024 so that this ranking can be completed.

Rank lists from own admission authority schools will be returned to Southampton City Council by 12th March 2024.

All applications will be validated by either the own-ranking schools or Southampton City Council to ensure that all information relevant to ranking applications is correct and appropriately recorded.

When all applications are ranked for schools, offers will be determined. In the event that an applicant is eligible for more than one school place, the place will be offered to the higher preference cited in the application.

If an applicant is not eligible for a place at any of their preference schools, they will be allocated a place at their catchment school or, should this school be full, at the nearest school to their home address with available places. This distance will be determined using the method outlined in the admissions policy of the relevant school.

SOUTHAMPTON
CITY COUNCIL

5. Outcome of Applications

All on-time applicants will be notified of the outcome of their application on 16th April 2024. This will either be by a notification via the Citizen’s Portal or in writing (either in hard copy or via email).

Parents/carers will be asked to formally accept or refuse the offer made to them. If a parent/carer refuses the offer made to them, the Admissions Team will seek to clarify how the child will be otherwise educated.

If a school place is offered anywhere other than at the first preference school, the parent/carers will have the right to appeal the refusal of a place. Information about this process will accompany the offer letter.

6. Data to Schools

Lists of allocated pupils will be provided to schools on 16th April 2024. Further updated lists will be provided regularly between this date and September 2024 as changes are made to the allocation lists.

7. Late Applications

All applications received after 23:59 on 15th January 2024 will be considered late applications and will not be processed until after the on-time applications.

Late applications are made, with limited exception, via a form on the Southampton City Council website.

Offers will be made to late applicants on a rolling basis after 16th April 2024.

Scheme Timeline:

July 2023	The Admissions Team will compile a list of pupils eligible for a Reception place in September 2023.
July-October 2023	Information will be sent to parent/carers of the above.
4 September 2023	Online applications open.
15 January 2024	Closing date for applications.
22 February 2024	Applications sent to own admission authority schools completing their own rankings and other Local Authorities.
12 March 2024	Own-ranking schools return their rank lists to the Local Authority.
16 April 2024	National Offer Day.

This page is intentionally left blank

Southampton City Council

Admission Policy for Community and Voluntary Controlled Junior Schools for 2024/25

Southampton City Council is the admission authority for all Community and Voluntary Controlled Junior schools in the city. As required in the School Admissions Code the authority will consider all on-time preferences at the same time for September 2024 admissions.

Parents may express up to three (3) preferences, listing them in the order in which they would accept them. All preferences will be considered and where more than one school could be offered, the parents will be offered a place for their child at the higher ranked of the schools on their application.

The Junior Schools covered by this policy are listed below, with their Published Admission Number (PAN). This is the number of children the school will admit in September 2024.*

School	Year R PAN
Fairisle Junior School	90

*At the time of publication, the schools listed above were using the SCC Admissions Policy and appropriate PAN. Please note that this list is subject to change. The Council website has the most up to date information on school status (academisation etc.) and amendments to PANs that may have taken place in accordance with admissions legislation or school organisation decisions since publication.

Children with Education, Health and Care Plans (EHCP) that name a school

Children with Education, Health and Care Plans (EHCPs) that name a school must be admitted to that school under the Education Act 1996 and with regard to the SEND Code of Practice. These children will be admitted to the named school, even if it is full, and are therefore outside the normal admission arrangements. As required by the Admissions Code, these children will count as part of the Published Admission Number (PAN) for the school.

Oversubscription criteria

Applications submitted by 15 January 2024 will be dealt with first. If the number of applications submitted by 15 January 2024 is greater than the PAN for a school, admissions to the school will be decided according to the following priorities:

1. Children who are currently, or have previously been in care (Looked After and Previously Looked After Children)

2. Children subject to a Child Protection Plan or deemed to be vulnerable by a senior officer with responsibility for safeguarding in Southampton City Council

3. Children attending the linked infant school at the time of application

4. Children who have a sibling on the roll of the school that will continue to attend that school for the following year

5. Children whose parents have satisfied the Local Authority that their child has a significant medical or psychological condition which means they must attend the preferred school rather than any other

6. Children who qualify for the Service Premium, as the child of a member of the Armed Forces

7. Children who live within the school's designated catchment area

8. Children who live closest to the school

Should a school be oversubscribed from within any of the criteria, then distance, as defined by this policy, will be used to prioritise applications within these categories. Should there be two or more identical distances requiring prioritisation, this will be done by casting lots. Lots will be drawn by the Divisional Head of Education and Learning at Southampton City Council.

Late Applications

The closing date for applications is 15 January 2024. Applications received after that date will be late applications and will dealt with after all on time applicants have been offered a school place. If a school has places available after admitting all on-time applications, late applications will be considered in accordance with the priorities set out above.

Waiting Lists

If a place cannot be offered at a higher ranked Community or Voluntary Controlled school, unsuccessful applicants will automatically be placed on the waiting list for the school. If places become available, children on the waiting list will automatically be offered them according to the priorities set out above and any previous offer of a school place will be withdrawn.

The length of time on the waiting list cannot be taken into account. Unsuccessful late applications will be treated in the same way as unsuccessful on time applications and placed on the waiting list according to the priorities set out above. This means that waiting lists will be re-ranked after every new expression of preference.

Waiting lists will be held until 31 July 2025. Any parent wishing to remain on the waiting lists after this date will need to make a new in-year application to the school.

Unplaced Children

Any child who remains unplaced after their application has been processed, because they could not be offered a place at any school requested, will be offered a place at their catchment school if there is one and if places are still available. If there are no places available at their catchment school, they will be allocated a place at the nearest school to their home address with places available.

In-Year Admission

Admissions mid-year for any year group will be dealt with in accordance with this policy.

Definitions

Previously/Looked After Child: Looked After Children are Children who are in the care of local authorities as defined by Section 22 of the Children Act 1989. In relation to school admissions legislation a 'looked after child' is a child in public care at the time of application to a school. A Previously Looked After Child, as defined by the Admissions Code, is one who was: looked after, but ceased to be so because they were adopted (or became subject to a child arrangements order or special guardianship order), including those children who appear (to the admission authority) to have been in state care outside of England and ceased to be in state care as a result of being adopted.

Linked Infant School: This criterion applies only at the time of transfer from Year 2 to Year 3 and until the end of the first term of junior school (December 31 2024). After that time previous attendance at the linked infant school gives no priority to an application for a place at the linked junior school.

Fairisle Junior School's linked infant school is Fairisle Infant School.

Sibling: This includes children living as siblings in the same family unit. In the case of applications for places at infant schools a sibling at the linked junior school will count as a sibling at the infant school. A sibling is defined as a brother or sister including half, step, foster or adoptive brother or sister, living within the same family unit at the same address.

Catchment Area: A "designated catchment area" for a school is the area set out in the definitive catchment area map for each school. This map is held by Southampton City Council, Civic Centre, Southampton SO14 7LY. A schedule of addresses, to be read in conjunction with the map, is also kept by the Council. Parents wishing to know if their address is in a particular catchment area can contact the Admissions Team, or log on to the council website www.southampton.gov.uk, click on "My Southampton", follow the links, and enter their postcode.

Service Premium: A child will qualify for the Service Premium if their circumstances satisfy any of the following:

- one of their parents is serving in the regular armed forces (including pupils with a parent who is on full commitment as part of the full time reserve)
- one of their parents died whilst serving in the armed forces and the pupil receives a pension under the Armed Forces Compensation Scheme or the War Pensions Scheme

Proof of this criteria may be provided in a letter from the service parent's commanding officer, confirming employment, or evidence of the receipt of a service pension.

Denominational Grounds: Evidence of regular church attendance at services held by the Church of England or a local ecumenical partnership (as defined in the school's prospectus) must be certified by the vicar or someone else of authority in the church, using the Local Authority's Supplementary Information Form (SIF) which can be found on the council website, alongside this policy.

"Regular" is defined as "attending worship services at a Church of England church or local ecumenical partnership at least twice a month for the previous two years before the deadline for admissions set by Southampton City Council."

'Christian fellowship' is defined as 'a worshipping fellowship who confess the Lord Jesus Christ as God and Saviour according to the Bible and therefore seek to fulfil together their common calling to the glory of the one God, Father, Son and Holy Spirit; who are members or participant observers of the World Council of Churches of the World Evangelical Alliance.'

Distance: Distances are measured based on the shortest walking distance using public roads and footpaths. Distances are measured from home to school for all children. These are calculated using a computerised mapping system that uses data supplied by Ordnance Survey. Distances are measured from the point designated in the system as the home address to the point designated in the system as the mid-point of the nearest open pedestrian gate to the school, using public roads and footpaths considered safe for children to traverse.

Admission of Children Outside of the Normal Age Group

Parents may request that their child is admitted outside their normal age group, for example, if the child is gifted or talented or has experienced problems such as ill health, or they are summer born and were admitted to Year R outside the normal age group. All requests will be considered on their merits by Southampton City Council taking account of the parent's view and the views of the headteacher.

Parents of summer-born children for whom education outside normal age group was previously agreed will be required to make a new request for entry into junior school. This should be done as if the child is placed in their correct year group. For example, a child who has been held back a year (decelerated) should be making a new request when the child is in Year 1.

Before making such a request, parents are strongly advised to read the 'Guidance on the education of children outside normal age group' document available on the Southampton City Council website, which explains the procedures that need to be followed.

For all requests it is vital to understand that at each transition (starting reception, moving from infant to junior, primary to secondary, secondary to college) the decision whether to maintain the placement in a younger or older year group must be made by the admission authority for the school. As such, there is no guarantee that it will continue throughout the child's education and a new parental request must be made before each transition. As a general rule, requests should only be made once per phase transfer, unless there has been a significant change in circumstances.
One admission authority cannot be required to honour a decision made by another admission authority on education out of normal age group.

SOUTHAMPTON CITY COUNCIL

Southampton City Council

Coordinated Scheme for Entry into Year 3 at Junior Schools for the 2023/24 Academic Year

This scheme details the coordinated admission arrangements for Year 3 entry into junior schools in Southampton in September 2024, in accordance with the School Admissions (Co-ordination of Admission Arrangements) (England) Regulations 2008 and the School Admissions Code (2021).

This scheme details the mechanisms for the process of 'mainround' admission into Year 3, including the process of application, offering of school places and the provision for late applications. It is enacted to ensure that all on-time applicants receive an offer of one school place on the National Offer Day of 16th April 2024.

The scheme incorporates all state-funded schools within the Southampton City Council boundary, including foundation/trust schools and academies who may be their own admission authorities.

This scheme has been separated into the following sections:

1. Data Capture
2. Application Process
3. Closing Date
4. Processing of On-Time Applications
5. Outcome of Applications
6. Data to Schools
7. Late Applications

1. Data Capture

In July 2023, the Admissions Team at Southampton City Council will compile a list of resident children who are in Year 1 and attending Infant Schools either within the Southampton City Council boundary or neighbouring authorities.

While applying for a school place and seeking information on this process is ultimately the responsibility of parents and carers, Southampton City Council recognise that this can be a complex process, especially for first-time parents, and seek to support wherever possible. To that end, between July and October 2023, the Admissions Team will send out information to all families identified in the data capture to inform them of the school application process, as well as working with schools to offer opportunities for support.

2. Application Process

Individual school admissions policies will be published on the schools' websites from 15th March 2023. A composite prospectus, compiling the policies of all schools within the Southampton City Council boundary will be published on the Council website no later than 12th September 2023. A hard copy of this composite prospectus is available upon request.

Parents must apply for a school place via the Local Authority for the area where they live, even if they wish to apply for schools within another Local Authority (i.e. Southampton City Council residents must apply to Southampton City Council, even if they are applying to schools within the Hampshire County Council boundary).

Applications are made, with limited exception, online via the Southampton City Council Citizen's Portal. Parents must register an account to use the system. The Citizen's Portal is provided by Capita PLC and any system downtime for maintenance is outside of the control of Southampton City Council but will naturally avoid closing and offer dates.

Online applications for Year 3 places will open on 4th September 2023.

3. Closing Date

The national closing date for Year 3 applications is 15th January 2024. Applications can be submitted until 23:59 on this date.

4. Processing of On-Time Applications

As per the requirements of the School Admissions Code 2021, Southampton City Council operates an 'equal preference' system, meaning that all preferences expressed on an application are treated as applications to those schools and processed at the same time.

If an application cites a preference for an own admission authority school that completes its own ranking, this information will be sent to the school by 22nd February 2024 so that this ranking can be completed.

Rank lists from own admission authority schools will be returned to Southampton City Council by 12th March 2024.

All applications will be validated by either the own-ranking schools or Southampton City Council to ensure that all information relevant to ranking applications is correct and appropriately recorded.

When all applications are ranked for schools, offers will be determined. In the event that an applicant is eligible for more than one school place, the place will be offered to the higher preference cited in the application.

If an applicant is not eligible for a place at any of their preference schools, they will be allocated a place at their catchment school or, should this school be full, at the nearest school to their home address with available places. This distance will be determined using the method outlined in the admissions policy of the relevant school.

5. Outcome of Applications

All on-time applicants will be notified of the outcome of their application on 16th April 2024. This will either be by a notification via the Citizen's Portal or in writing (either in hard copy or via email).

Parents/carers will be asked to formally accept or refuse the offer made to them. If a parent/carer refuses the offer made to them, the Admissions Team will seek to clarify how the child will be otherwise educated.

If a school place is offered anywhere other than at the first preference school, the parent/carers will have the right to appeal the refusal of a place. Information about this process will accompany the offer letter.

6. Data to Schools

Lists of allocated pupils will be provided to schools on 16th April 2024. Further updated lists will be provided regularly between this date and September 2024 as changes are made to the allocation lists.

7. Late Applications

All applications received after 23:59 on 15th January 2024 will be considered late applications and will not be processed until after the on-time applications.

Late applications are made, with limited exception, via a form on the Southampton City Council website.

Offers will be made to late applicants on a rolling basis after 16th April 2024.

Scheme Timeline:

July 2023	The Admissions Team will compile a list of pupils eligible for a Year 3 Junior School place in September 2024.
July-October 2023	Information will be sent to parent/carers of the above.
4 September 2023	Online applications open.
15 January 2024	Closing date for applications.
22 February 2024	Applications sent to own admission authority schools completing their own rankings and other Local Authorities.
12 March 2024	Own-ranking schools return their rank lists to the Local Authority.
16 April 2024	National Offer Day.

This page is intentionally left blank

Southampton City Council

Coordinated Scheme for Entry into Year 7 at Secondary Schools for the 2024/25 Academic Year

This scheme details the coordinated admission arrangements for Year 7 entry into secondary schools in Southampton in September 2024, in accordance with the School Admissions (Co-ordination of Admission Arrangements) (England) Regulations 2008 and the School Admissions Code (2021).

This scheme details the mechanisms for the process of 'mainround' admission into Year 7, including the process of application, offering of school places and the provision for late applications. It is enacted to ensure that all on-time applicants receive an offer of one school place on the National Offer Day of 1st March 2024.

The scheme incorporates all state-funded schools within the Southampton City Council boundary, including foundation/trust schools and academies who may be their own admission authorities.

This scheme has been separated into the following sections:

1. Data Capture
2. Application Process
3. Closing Date
4. Processing of On-Time Applications
5. Outcome of Applications
6. Data to Schools
7. Late Applications

1. Data Capture

In July 2023, the Admissions Team at Southampton City Council will compile a list of resident children who are in Year 5 and attending Infant Schools either within the Southampton City Council boundary or neighbouring authorities.

While applying for a school place and seeking information on this process is ultimately the responsibility of parents and carers, Southampton City Council recognise that this can be a complex process, especially for first-time parents, and seek to support wherever possible. To that end, between July and October 2023, the Admissions Team will send out information to all families identified in the data capture to inform them of the school application process, as well as working with schools to offer opportunities for support.

2. Application Process

Individual school admissions policies will be published on the schools' websites from 15th March 2023. A composite prospectus, compiling the policies of all schools within the Southampton City Council boundary will be published on the Council website no later than 12th September 2023. A hard copy of this composite prospectus is available upon request.

Parents must apply for a school place via the Local Authority for the area where they live, even if they wish to apply for schools within another Local Authority (i.e. Southampton City Council residents must apply to Southampton City Council, even if they are applying to schools within the Hampshire County Council boundary).

Applications are made, with limited exception, online via the Southampton City Council Citizen's Portal. Parents must register an account to use the system. The Citizen's Portal is provided by Capita PLC and any system downtime for maintenance is outside of the control of Southampton City Council but will naturally avoid closing and offer dates.

Online applications for Year 7 places will open on 4th September 2023.

3. Closing Date

The national closing date for Year 7 applications is 31st October 2023. Applications can be submitted until 23:59 on this date.

4. Processing of On-Time Applications

As per the requirements of the School Admissions Code 2021, Southampton City Council operates an 'equal preference' system, meaning that all preferences expressed on an application are treated as applications to those schools and processed at the same time.

If an application cites a preference for an own admission authority school that completes its own ranking, this information will be sent to the school by 19th November 2023 so that this ranking can be completed.

Rank lists from own admission authority schools will be returned to Southampton City Council by 10th January 2024.

All applications will be validated by either the own-ranking schools or Southampton City Council to ensure that all information relevant to ranking applications is correct and appropriately recorded.

When all applications are ranked for schools, offers will be determined. In the event that an applicant is eligible for more than one school place, the place will be offered to the higher preference cited in the application.

If an applicant is not eligible for a place at any of their preference schools, they will be allocated a place at their catchment school or, should this school be full, at the nearest school to their home address with available places. This distance will be determined using the method outlined in the admissions policy of the relevant school.

SOUTHAMPTON
CITY COUNCIL

5. Outcome of Applications

All on-time applicants will be notified of the outcome of their application on 1st March 2024. This will either be by a notification via the Citizen's Portal or in writing (either in hard copy or via email).

Parents/carers will be asked to formally accept or refuse the offer made to them. If a parent/carer refuses the offer made to them, the Admissions Team will seek to clarify how the child will be otherwise educated.

If a school place is offered anywhere other than at the first preference school, the parent/carers will have the right to appeal the refusal of a place. Information about this process will accompany the offer letter.

6. Data to Schools

Lists of allocated pupils will be provided to schools on 1st March 2024. Further updated lists will be provided regularly between this date and September 2024 as changes are made to the allocation lists.

7. Late Applications

All applications received after 23:59 on 31st October 2023 will be considered late applications and will not be processed until after the on-time applications.

Late applications are made, with limited exception, via a form on the Southampton City Council website.

Offers will be made to late applicants on the following basis:

Application Received Between:	**Offer Made:**
1 November – 31 December 2023	W/c 11 March 2024
1 January – 28 February 2024	W/c 6 May 2024
1 March – 30 April 2024	W/c 24 June 2024
1 May – 31 June 2024	W/c 22 July 2024
1 July – 31 August 2024	Rolling offers throughout the period

SOUTHAMPTON CITY COUNCIL

Scheme Timeline:

July 2023	The Admissions Team will compile a list of pupils eligible for a Year 7 Secondary School place in September 2024.
July-October 2023	Information will be sent to parent/carers of the above.
4 September 2023	Online applications open.
31 October 2023	Closing date for applications.
19 November 2023	Applications sent to own admission authority schools completing their own rankings and other Local Authorities.
10 January 2024	Own-ranking schools return their rank lists to the Local Authority.
1 March 2024	National Offer Day.

SOUTHAMPTON CITY COUNCIL

SUPPLEMENTARY INFORMATION FORM

Only to be used for applications for Voluntary Controlled Schools maintained by Southampton City Council where parents are applying for their child to attend a Church of England voluntary controlled school on denominational grounds.

The purpose of this Supplementary Information Form is to verify the active membership of the Church of England of one or both parents. Active membership is defined as attending worship at a Church of England church at least twice a month for the previous two years before the deadline for admissions set by Southampton City Council.

Child's Name:	
Child's Date of Birth:	
Child's Address:	
Voluntary Controlled School(s) being applied for on denominational grounds:	
Voluntary Controlled School(s) being applied for on denominational grounds:	
Voluntary Controlled School(s) being applied for on denominational grounds:	
Church at which parent(s) have active membership:	
By signing the below, the parent(s) confirm that they are active members of the Church of England place of worship named above and would like their child's application for the Voluntary Controlled schools named considered under denominational grounds.	
Parent 1 Signature:	
Parent 1 Name (Print):	
Date:	
Parent 2 Signature (if applicable):	
Parent 2 Name (Print):	
Date:	
By signing the below, the designated church official is confirming the active membership of one or both parents named above at the named place of worship	
Church Official Signature:	
Church Official Name:	
Church Official Role:	
Church Official Email or Telephone:	

You must complete this form and return it to Southampton City Council by 15th January. If you do not submit this form in time, your application cannot be considered under the faith criterion.

This page is intentionally left blank

DECISION-MAKER:	**Cabinet**
SUBJECT:	**Adopting the Southampton Festivals and Events Strategy 2022-2032**
DATE OF DECISION:	**7th February 2023**
REPORT OF:	**COUNCILLOR KAUR** **CABINET MEMBER FOR CULTURE**

CONTACT DETAILS				
AUTHOR:	**Title**	**Head of Culture & Tourism**		
	Name:	**Carolyn Abel**	Tel:	
	E-mail:	**carolyn.abel@southampton.gov.uk**		
Director	**Title**	**Executive Director, Place**		
	Name:	**Adam Wilkinson**	Tel:	
	E-mail:	**adam.wilkinson@southampton.gov.uk**		

STATEMENT OF CONFIDENTIALITY		
None		
BRIEF SUMMARY		
A new Southampton Festivals and Events Strategy 2022-2032 was commissioned and completed in 2022. Cabinet is asked to adopt the strategy as part of Southampton's UK City of Culture legacy and builds on the adopted Corporate Plan 2022-2030, Cultural Strategy 2021-2031, Destination Management Plan 2021-2031 and Economic Strategy 2021-2031. The strategy proposes a vision, objectives and priority actions, working collaboratively across the city and with wider partners to capitalise on the ambitions for Southampton's residents, businesses and visitors.		
RECOMMENDATIONS:		
	(i)	That Cabinet adopts the proposed Festivals and Events Strategy 2022-2032
	(ii)	That Cabinet supports the development of a prioritised action plan following the formation of a new Festival and Events Working Group
	(iii)	That the Head of Culture & Tourism has delegated authority to: • make minor and consequential amendments to the strategy • any other ancillary decisions in order to give effect to the recommendations in this report and the strategy, including the working group formation and action plan prioritisation
REASONS FOR REPORT RECOMMENDATIONS		
1.	The Festivals and Events strategy supports and is an outcome of the adopted Cultural Strategy 2021-2031, Destination Management Plan 2021-2031, Economic Strategy 2021-2031 and the UK City of Culture 2025 consultation,	

	and supports the Council's Corporate Plan. It contributes to supporting the delivery of ambitious economic, social and environmental benefits for communities, visitors and businesses through collaboration, attracting inward investment and raising the profile of Southampton locally, nationally and internationally.
2.	The strategy seeks to capitalise on the benefits arising from Southampton's UK City of Culture 2025 bid and the formation of the new Southampton Culture Trust. This collaborative place-based partnership will focus on Culture, Destination and Festivals and Events, and the strategy and action plan will guide and underpin that work with and on behalf of the city.
ALTERNATIVE OPTIONS CONSIDERED AND REJECTED	
3.	Not adopting the strategy is rejected given the strategic and wide-ranging benefits it will bring to the city for multiple stakeholders, and the ambition to develop a sustainable and high-quality festival and events programme and sector that puts Southampton and the region on the map.
DETAIL (Including consultation carried out)	
4.	In 2022 FEIUK (specialists in transforming place through culture) were commissioned to develop a new festival and events strategy for Southampton. The need had been previously identified by multiple stakeholders (festivals and events sector, community groups, businesses), reinforced by the devastating impact of the pandemic on the sector and the findings of the extensive consultation undertaken during the UK City of Culture 2025 bidding process.
5.	The strategy has been developed considering local strengths, opportunities, challenges, strategic ambitions and learning from best practice from other successful festival cities across the world (Belfast, Bristol, Glasgow, Rotterdam). It is built on an evidence base that was developed through the following activity, and was reviewed with a working group comprising representatives from across the sector (commercial, civic, community): • Strategic Context and Evidence Review – considering key strategic documents locally, regionally and nationally and analysing existing data • Mapping – primary research to identify existing festivals and events in Southampton and identify those with the potential to develop • Sector Survey – to understand more about the sector and its impact with 19 organisers providing detailed responses • Case Studies – research into four cities (Belfast, Bristol, Glasgow, Rotterdam) to understand best practice for festival and event development and delivery • Stakeholder Consultations – 1:1 discussion with 26 key stakeholders and representatives identified by the working group
6.	The key findings from this research are summarised as follows with a detailed SWOT analysis in the main document (see Appendix A): • **About Southampton** - a well connected, young and multi-cultural port city with distinctive strengths • **Portfolio** - a small and polarised portfolio which needs support to grow • **Audiences** - mostly serving local and niche audiences and in need of a curated marketing and audience development strategy

	• **Sector** - a polarised sector but with huge potential to develop collaboratively through training and networking • **Spaces** - some excellent sites and spaces for events which require sensitive management and programming • **Policy and Processes** - efficient and valued practical expertise but with potential to increase quality and impact • **Leadership and Delivery** - strong partnership working but no formal leadership structure to support festivals and events across the city
7.	Furthermore, the development of this strategy revealed an ambitious, enterprising and creative festival and events sector with the potential to grow and deliver real impact for Southampton. The city has considerable assets and expertise which could be more effectively used, and a significant potential audience for festivals and events making the city attractive to both home-grown and visiting event organisers.
8.	The adopted Cultural Strategy, Destination Management Plan, Economic Strategy and Corporate Plan provides a framework for a holistic approach that harnesses the potential of festivals and events to meet identified social, cultural and economic priorities and help tell a more compelling narrative of place. There is a strong track-record of partnership working and enthusiasm to do more together to develop Southampton into a festival city and event destination.
9.	The most successful places have a mixed portfolio of festivals and events covering a range of forms and functions which also have the capacity to host major events and sometimes a role in mega events. Five broad categories based on international industry standards adapted by FEIUK have been applied to categorise according to scale and the intent of organisers. These categories are: • Mega Events e.g. Olympics, World Cup • Major Events e.g. UK City of Culture, Ryder Cup • Signature Events e.g. Edinburgh Festival, Brighton Festival • Growth Events i.e. distinctive to the location with national potential • Local Events i.e. targeted at local audiences
10.	Within a Southampton context therefore, the strategy sets out a vision and framework for curating and developing a rich and distinctive portfolio and puts forward an indicative set of action areas. The vision, themes, principles and priorities are detailed in the strategy and recognises that not all festivals and events will meet the identified priorities. However, the ambition should be that by 2030, there will be examples of good practice when the whole of the Southampton festivals and events portfolio is considered.
11.	The proposed vision is outlined below, supported by the principles of access and inclusion, environmental sustainability, wellbeing and financial sustainability: *So Vibrant, So Distinctive, So Welcoming, So Southampton Festivals* *Southampton is a city with a distinctive and varied range of festivals and events that bring the City’s unique identity to life and extends a warm welcome to all, whatever your interests and wherever you are from*
12.	The priorities for festival and events in Southampton should: a) Be authentic, unique and of high quality to support the vision, focus and ambition of this strategy and put Southampton on the map.

	b) Be relevant, maximising opportunities to develop audiences and partnerships on a local, regional and global scale. c) Drive cultural place-making through animating new and under-used places across the city, and revitalising the city-centre with an offer that is year-round and supports the night-time economy. d) Attract higher-spending visitors both domestic and overseas and encourage them to stay longer, come back and recommend Southampton to others. e) Foster emotional connection by engaging communities, supporting wellbeing, building civic pride and local capacity through opportunities for participation and volunteering, ensuring access for all. f) Actively contribute to addressing environmental sustainability challenges. g) Be creatively innovative and sustainable, by producing new work and testing new ideas and approaches within a clear sense of future direction. h) Strengthen the local and global connections of business, cultural and academic partnerships and networks. i) Support professional creative, technical and management talent development through employment, training and showcasing. j) Sustain and create higher value jobs and professions, including creating paid opportunities for creative freelancers.
13.	The strategy recognises that different types of festivals and events will have different types of impact: mega and major events may have good economic impact but low social impact. Local events may have profound social good but comparatively low levels of economic benefit. Many festivals and events will contribute across multiple domains, helping to lever additional value for the area. A strong portfolio will have a mix of different types of festivals creating different types of impact. To support this, a standardised evaluation methodology and shared set of performance indicators has been developed to guide Southampton's decision-making and provides a methodology for measuring the collective impact to tell the bigger story of the value of festivals and events in Southampton. Sensitively applied, this can be a useful planning tool to help design the festival and event to be as impactful as possible. The level of impact that can be achieved will be dependent on the capacity of the organiser and the resources they have at their disposal. These impact areas and measures centre on: • Cultural – quality, ambition, place-making, capacity, international profile and reach • Social – local engagement, wellbeing, skills, environmental sustainability • Economic – overseas and domestic audiences, financial leverage, employment and local suppliers/ spend • Organisational capacity – ability to deliver, suitability, risks, potential to grow
14.	The strategy proposes actions to grow Southampton's festival and events portfolio including: regional partnerships for hosting major events, the development of two to four signature events over the next five years, identify potential growth events and support organisers to develop three-year business plans, and in terms of local events improving support for organisers

	e.g. online information about sites and guidance about how to organise events.
15.	There are key actions for the Council including, for example: • Development of an Events Policy including charging • Payment of artists for event organisers in receipt of an events grant • Research into existing holding powers into key sites and investigate whether these are still relevant to the city's needs and ambitions • Development of detailed location profiles (see Appendix 1 of the strategy) for all event spaces in the city beginning with a pilot programme focusing on a small number of key sites, developed and iterated with the sector, partners and residents
16.	This festival and events strategy seeks to build upon the identified needs and opportunities that have been heightened by Southampton's ambitions to become UK City of Culture in 2025. Whilst the title went to another place, the city is eager to capitalise on the momentum and progress achieved to bring social, economic, cultural and environmental benefits to communities, business and visitors to Southampton and the wider region and this strategy is one element in that journey.
RESOURCE IMPLICATIONS	
<u>Capital/Revenue</u>	
17.	There are no direct additional revenue or capital financial implications to the Council in implementing the Southampton Festival and Events Strategy at this stage. If there are resource implications for the Council these will be considered in the context of essential spend criteria and business and financial planning. Partners will look to a range of funding sources to implement this strategy where required
18.	This is a city-wide strategy that sets out a framework for improving the range, quality and collaborations that will lever investment and bring direct economic and social benefits for the city and region. The Council and the Culture Trust will work with partners to realise that potential over the life-span of the strategy which includes giving consideration to incorporating improvements to event spaces as part of public realm regeneration as well as supporting the sustainability and viability of the festival and events industry.
19.	Existing resource within the Council's Events team and the Events Safety Advisory Group are a critical part of ensuring legal compliance and avoiding service failure, including supporting festival and event organisers to deliver their business and activity to benefit residents, businesses and stakeholders when implementing this strategy.
20.	As the Council is currently limiting expenditure to essential spend only, then the essential spend criteria will be carefully considered before committing resources in implementing this strategy.
<u>Property/Other</u>	
21.	This is about realising the potential as well as mitigating the impact of events on Council assets especially residential, green and open spaces. This is identified in the Service's Asset Strategy as part of the Council's Strategic Asset Management Plan.

LEGAL IMPLICATIONS	
<u>Statutory power to undertake proposals in the report</u>:	
22.	Section 1, Localism Act 2011 provides a 'general power of competence', giving local authorities the legal capacity to do anything that an individual can do that is not specifically prohibited.
23.	The advancement and implementation of certain elements within the strategy may require individual decision making at an appropriate time and will require compliance with all legal frameworks and requirements.
<u>Other Legal Implications</u>:	
24.	Comply with legal requirements around event safety including incoming legislation around Protect Duty.
25.	Comply with legal requirements around the use of Council land for events e.g. the Hampshire Act for Mayflower Park.
RISK MANAGEMENT IMPLICATIONS	
26.	Risk – limited stakeholder buy-in/ or withdrawal of support Mitigation – shared development and ownership, relationship management, communication, governance
27.	Risk – key partners no longer part of the ecology Mitigation – provide business support/ advice if required, find alternative delivery partners
28.	Risk – insufficient resources to deliver strategy Mitigation – identify alternate/ additional resources/ partnerships
POLICY FRAMEWORK IMPLICATIONS	
29.	Aligned to the Council's Corporate Plan 2022-2030, Cultural Strategy 2021-2031, Destination Management Plan 2021-2031, Economic Strategy 2021-2031

KEY DECISION?	**N/A**
WARDS/COMMUNITIES AFFECTED:	All

<u>SUPPORTING DOCUMENTATION</u>

Appendices	
1.	Southampton Festivals and Events Strategy 2022-2032

Documents In Members' Rooms

1.	None
Equality Impact Assessment	
Do the implications/subject of the report require an Equality and Safety Impact Assessment (ESIA) to be carried out.	**No**
Data Protection Impact Assessment	

<table>
<tr><td colspan="3">Do the implications/subject of the report require a Data Protection Impact Assessment (DPIA) to be carried out.</td><td>No</td></tr>
<tr><td colspan="4">Other Background Documents
Other Background documents available for inspection at:</td></tr>
<tr><td colspan="2">Title of Background Paper(s)</td><td colspan="2">Relevant Paragraph of the Access to Information Procedure Rules / Schedule 12A allowing document to be Exempt/Confidential (if applicable)</td></tr>
<tr><td>1.</td><td>None</td><td colspan="2"></td></tr>
</table>

This page is intentionally left blank

Southampton Festival & Events Strategy 2022 - 2032

Developed with:

Contents

1. Introduction

This Festival and Events Strategy has been developed to harness the considerable creativity, energy and enthusiasm for festivals and events amongst the city's stakeholders and within the culture and events sector. The strategy was developed between March and July 2022, with the direct input of 26 stakeholders building on the discussions that took place as part of the city's bid to be UK City of Culture 2025.

In this context, the Southampton2025 Trust will transition to become a strategic place-based Culture Trust delivering on objectives covering culture, festivals events, destination, creative industries and national and international partnerships that will continue to raise the profile of Southampton, drive footfall and attract greater investment. This strategy forms part of that process.

The research and consultation undertaken during the development of this strategy shows an ambitious, enterprising and creative festival and events sector with potential to grow and deliver real impact for Southampton. The city has considerable assets and expertise which could be more effectively used, and a significant potential audience for festivals and events making the city attractive to both home-grown and visiting event organisers. The adopted Cultural Strategy, Destination Management Plan and Economic Strategy provides a framework for a holistic approach that harnesses the potential of festivals and events to meet identified social, cultural and economic priorities and help tell a more compelling narrative of place. There is a strong track-record of partnership working and enthusiasm to do more together to develop Southampton into a festival city and event destination.

The festival and events strategy sets out a vision and framework for curating and developing a rich and distinctive portfolio and puts forward an indicative set of action areas. The next step will be to create an action plan identifying priorities for the short, medium and long term.

The strategy has been developed considering local strengths, opportunities, challenges, strategic ambitions and learning from best practice from other successful festival cities across the world.

2. Context and Current Situation

2.1 Definition of Festivals and Events

Festivals and events are sometimes used interchangeably in this strategy but can be understood as follows:

- Festivals are time limited public celebrations that convey, through a kaleidoscope of activities, certain meanings to participants and spectators
- Events tend to be discrete, one-off and often touring celebrations of fixed duration

Both festivals and events are not 'business as usual' and provide opportunities for shared public celebrations, distinctive from the 'everyday' and regular formal cultural activity.

The strategy categorises events into five broad categories based on international industry standards which FEI have adapted over the course of our work with cities and places. These categorisations are not hierarchical but instead consider a range of factors alongside scale. They are focused on the intention of the organiser and the potential outcomes of the event. This approach helps to ensure that festivals and events receive the most appropriate support and to help organisers identify specific areas of strength and improvement.

FESTIVALS & EVENTS INDUSTRY CLASSIFICATION

MEGA EVENTS
Peripatetic international events with global reach
Major bidding effort
High level of national government resource and support
Come with broadcast partners
Eg Olympics, World Cup

MAJOR EVENTS
Both peripatetic and one-off events
Required to be bid for
Rights may be owned by a third party
International reach through media coverage
Significant national and international attendance
Significant economic impact
Partnership bidding effort
Mostly sporting, sometimes cultural
EG. UK City of Culture, Ryder Cup

SIGNATURE EVENTS
Recurring events – annually or periodically
Home produced or commissioned
Distinctive to the location
Enhanced sense of place and visitor experience
National and international reach through media coverage
Local, regional and international attendance
Economic, social and cultural impact
Often require public funding but have mixed economy
Mostly cultural events, sometimes sporting
Professionally run
EG. Edinburgh Festivals, MayFest, Brighton Festival

GROWTH EVENTS
Recurring events with a specific plan for step change development
Can be new ideas and concepts – requiring testing
Distinctive to the location and place opportunity
Strong local ownership but with wider partnerships
Mainly local attendance but with stated potential to attract visitors nationally and internationally
Potential national reach through media coverage
Economic, social and cultural impact
Often require public funding to test and develop
Mostly cultural events, sometimes sporting
Professionally run

LOCAL EVENTS
Recurring events; occasionally one-off
General or specific interest but aimed mainly at residents
Limited economic impact, often significant social impact
Local relevance and interest
Local media coverage
Local attendance
Can be run by councils or community groups
Includes civic events, neighbourhood events, touring events

The most successful places have a portfolio of different event categories: Signature, Growth and Local, covering a range of forms and functions. They also have the capacity to host Major Events independently and sometimes play a role in Mega Events.

2.2 Current Situation

The Festival and Events strategy is built on an evidence base that was developed through the following activity:

- Strategic Context and Evidence Review – considering key strategic documents locally, regionally and nationally and analysing existing data
- Mapping – primary research to identify existing festivals and events in Southampton and identify those with the potential to develop
- Sector Survey – to understand more about the sector and its impact with 19 organisers providing detailed responses
- Case Studies – research into 4 cities (Rotterdam, Belfast, Glasgow and Bristol) in order to understand best practice for festival and event development and delivery

- Stakeholder consultations – 1:1 discussion with key stakeholders and representatives identified by the working group. 26 people were spoken to in the course of the project.

The key findings from this activity are summarised below.

2.2.1 About Southampton

A well connected, young and multi-cultural port city with distinctive strengths

Southampton is a port city with a growing population with around 260,000 people calling the city home in 2021. It has a significantly younger and more culturally diverse population than the UK average. The city has been shaped through the endeavour and enterprise of generations of arrivals from all over the world and the city prides itself as being welcoming and inclusive with the desire to provide opportunities for all. It is a ‘City of Sanctuary’ with over 150 languages spoken in the city’s schools.

Southampton has a rich built, social and industrial heritage linked to its strategic position as a port and an international reputation for innovation, particularly in marine and maritime research. With Solent Freeport status, Southampton is a ‘gateway to the world’ and has strong international connections and partnerships, particularly with the USA. The city is twinned with ports across the world and welcomes 2 million cruise visitors per year. The city has two universities who play an active civic role, and a student population of 43,000. Excellent transport connections via road, air, rail and sea provide the city with access to a significant audience regionally, nationally and internationally. Compared to much of the South East, Southampton has relatively high levels of deprivation, inequality and disadvantage some of which are also national outliers.

Southampton has some distinctive cultural jewels and assets including The Mayflower as one of the most successful commercial theatres in the UK and Southampton City Art Gallery, home to one of the best 20th century and contemporary art collections outside London. The city has cultural strengths in multi-cultural celebrations, live and electronic music, built and social heritage, urban culture, sports and contemporary visual and performing arts. Pre-pandemic the cultural sector generated £27m GVA with significant room for growth. The sector was hit particularly hard by the pandemic.

Southampton is also an important blue and green city with 52% designated as greenspace, nationally important wetlands and the Solent a Site of Specific Scientific Interest (SSSI). Southampton City Council declared a climate emergency with a commitment that its assets and operations would be carbon net zero by 2030.

The city is bidding for Purple Flag status to support the night-time economy and is on the journey to become a UNICEF Child Friendly City. The city has priorities around health and wellbeing, access and inclusion, environmental sustainability, internationalism and economic growth particularly through destination development and placemaking.

2.2.2 Portfolio

A small and polarised portfolio which needs support to grow

There are 90 festivals and events planned for 2022 of which only 60 are annual festivals and events. In 2019 it was estimated that there were 150 festivals and events each year which shows the impact of the pandemic on event activity in the city. The large percentage of touring and one-off events (33%) indicate that the city is an attractive proposition for external event promoters. Much of the portfolio had been running for more than 10 years (58%) and the sector considered that it was difficult to find enough sustained support to start new ideas and to grow new events and approaches over time.

The majority of events surveyed (46) are free to attend with 13 requiring registration and 16 partially or wholly ticketed. This indicates that a range of business models are in play. Most events take place in the city centre and June, July and September are the most popular months for both annual and occasional events. There is a noticeable gap in some parts of the city and in the months of March, October and over the December and January period. The most prevalent type of festival/ event is Community Event followed by Specific Cultural Celebrations: Live Music and Participatory Sporting Activity were also popular. Southampton has a number of key cultural strengths, assets and creative communities but not all are reflected in the city’s portfolio.

All key city strategic partners actively support and invest in the portfolio. The BID has produced its own events and invests in others, and the University of Southampton runs two festivals: the Southampton Science and Engineering Festival and the Southampton Arts & Humanities Festival. Solent University similarly delivers a range of participatory events through the academic year.

There is only one Signature Festival – Southampton International Boat Show – there are opportunities to support the festival to engage with local communities and businesses. The Southampton Mela was highly valued and the most recognised and anticipated festival in the calendar but is classified as a Growth festival. Three other festivals were identified as Growth festivals (Slamma/ Skate Southampton, Southampton Film Week and Southampton Sailing Week). A further 15 were local festivals with a distinctive offering and the potential to grow given additional support. Commercial event organisers are open and willing to work with the Council and partners to increase their local impact.

The current festivals and event portfolio provides important social benefits for residents: a survey of 19 festivals identified 4,035 direct participatory opportunities helping to support resident’s wellbeing and connection to others. Event organisers report an enthusiastic and loyal local audience and a collaborative sector.

2.2.3 Audiences

Mostly serving local and niche audiences and in need of a curated marketing and audience development strategy

Southampton has a resident population of 260,000 and welcomes over 8 million visitors per year including 2 million cruise ship visitors. An estimated 1.5 million people live within 30 minutes’ drive time.

The Audience Agency have developed a segmentation tool based on levels of cultural engagement. This shows that Southampton has a relatively high level of Experience Seekers (‘highly active, diverse, social and ambitious regular and eclectic arts engagers’). The hinterland includes a high proportion of Commuterland Culturebuffs (‘affluent, professional and suburbanite keen consumers of traditional culture’). The city also has relatively high pockets of Kaleidoscope Creativity (‘Mixed age urban low engagers preferring free, local, culturally specific arts and festivals’). See appendix 2.

The Sector Survey indicates that the majority (56%) of festivals and events attract mainly local audiences. Larger commercial events serve an established, loyal but niche audience. When the city hinterland is taken into account, there is a large audience who are able to pay for cultural experiences. However, there are also large numbers of local residents who are unable or unwilling to pay high ticket prices and free events play an important role in supporting cultural engagement. None of the festivals and events reported that they had been able to engage effectively with cruise visitor audience and regional awareness of the festival calendar was low. Accessibility, diversity and inclusion are recognised as important factors and a development opportunity by event organisers.

The Council provide marketing support to events equivalent to 80% of a Senior Communication Officer who attend events to generate marketing assets and create paid-for and in-kind advertising packages for event organisers using council-owned outdoor and digital marketing assets. Throughout the consultation, there was a desire for a more curated and co-ordinated marketing and communication strategy to pool resources and share effort, and to spotlight curated elements of the annual festival programme.

2.2.4 Sector

A polarised sector but with huge potential to develop collaboratively through training and networking

Generally, the sector is characterised by external commercial operators at one end and volunteer-led local community groups at the other with event budgets ranging from £300k to £1.5m. Public investment in festivals and events is small compared to other places. Southampton City Council invest approximately £125k each year into festival-related activity of which £50k is direct via a Festivals and Grants scheme. This compares to Rotterdam’s €1.6m investment in festivals and Belfast’s approximately £3m. Funding from Arts Council England (ACE) is also relatively low with only a very small number of organisations able to secure awards for festivals and events: only 6 organisations secured funding over the 2 ½ year period examined. More could be done to increase both direct resources and the capacity and knowledge of the sector to access funding. For example some practices, such as not paying artists and freelancers, makes projects ineligible for ACE funding and should also be addressed as a principle in the Council’s grants and funding approaches.

The sector demonstrates a high level of commercial expertise and enterprise which could be better supported through policy interventions and partnership working and shaped to lever strategic impact. The two universities may play a key role in professionalising the sector, for example Solent University run a Festivals and

Events Management course and are active in research to support innovation and professional development in festivals and events.

Much of the sector is highly reliant on volunteers and freelancers with very few organised by paid professional staff. Despite that, festivals play an important role in the local economy. The 19 festivals that replied to the Sector Survey employed 46 permanent staff, 87 casual staff, 477 creative and technical freelancers and worked with 150 local suppliers and service providers. There is enthusiasm amongst the sector for a **Festival and Events Forum** to provide a space for greater networking, advocacy and to exchange skills and knowledge.

2.2.5 Spaces
Some excellent sites and spaces for events which require sensitive management and programming
Southampton is well served with parks and open spaces which host a variety of festivals and events with 57 identified through the research. Key amongst these are The Common, Mayflower Park and Central Parks. The Common is the largest site with a capacity of 20,000+, Mayflower Park has a capacity of 15,000 and Hoglands Park, 10,000. Many of these sites have specific limitations which need to be considered when programming and designing events. This includes historic byelaws and legal restrictions. There is very limited access to the waterfront in the city which makes Mayflower Park a distinctive and attractive location and a key event site for signature events. However, the park is in need of investment to make it fit-for-purpose and to limit any negative impact on park users and residents. Other parks such as Palmerston Park also require greater investment and resources. There are under-used spaces across the city that could be utilised more effectively for events including spaces in neighbourhoods beyond the city centre such as Shirley, Portswood and Bitterne.

The city centre is a key site for events and in need of year-round animation to support the city’s role as a major retail and leisure destination. There are a number of partners involved in city centre events including the Council’s Events team who manage and license the Bargate Area, Above Bar and Guildhall Square and events across the Grade II listed Central Parks; GO! Southampton, the Business Improvement District who promote, support and have delivered events across the city centre area, and Westquay who programme and manage the West Quay Esplanade event space. Guildhall Square is the heart of the Cultural Quarter and the city centre’s most prominent open space. It is adjacent to many key cultural venues and organisations such as the O2 Guildhall, MAST, the John Hansard Gallery, City Eye, Central Library, SeaCity Museum and Southampton City Art Gallery.

2.2.6 Policy and Processes
Efficient and valued practical expertise but with potential to increase quality and impact
Many different departments across Southampton City Council are involved with events either directly or indirectly – for example the Parks team who manage and maintain the city’s green spaces and protect environmental sensitivities and Green City & Infrastructure who hold the responsibility for transport infrastructure and the public realm. The Council does not have a formal Events Policy and relies on good relationships across departments.

Within the Culture & Tourism team, the Events team comprises 3 officers who are responsible for managing all events on Council land including festivals, events, promotional activity and markets. They also support civic events such as Mayor Making and the Remembrance Service. Financial targets and responsibilities have increased over recent years. In a typical year, the team enable 250 events to take place. They are the first point of contact for anyone wishing to run an event and often provide ongoing support throughout the planning process. The expertise and input of the Events team is highly valued by many event organisers. The Event team also co-ordinate the monthly Safety Advisory Group (SAG) where event applications are discussed with a range of stakeholders and maintain informal but regular meetings with other site managers and owners both inside and outside the Council.

Local event organisers felt that the Council could do much more in terms of nurturing and supporting commercial, cultural and community groups and creative individuals who wanted to develop and produce new events, to advise on creative and business development and to broker relationships across the city. However, there is a limit to the existing capacity and may require different expertise. Commercial event organisers were willing to do more to engage more widely and support the city's strategic objectives.

Generic information about organising events is provided online but there was a request for more on-line toolkits and guidance, and for a volunteer bank. Respondents to the Sector Survey wanted more support in improving their practice in Community Engagement, Environmental Sustainability and Equality, Diversity and Inclusion.

Festivals and events can deliver a range of cultural, social and economic benefits for the city that are not yet being adequately captured through policy intervention. Funding programmes and site permissions and licenses do not clearly align strategically with city priorities. The recent adoption of the Cultural Strategy and Destination Management Plan provides a framework for embedding festivals and events in wider strategic objectives. However, consideration will also need to be given to the impact on local residents and the green spaces especially those with designated status – the Common is a SSSI and Central Parks are Grade II* listed.

2.2.7 Leadership & Delivery

Strong partnership working but no formal leadership structure to support festivals and events across the city

Southampton has a strong track-record of partnership working with excellent communication across the Council and with external partners. This has recently been strengthened through the process of bidding for UK City of Culture 2025, led by the Southampton2025 Trust.

The Culture & Tourism team have played a key role in strategic cultural programmes for the city such as Mayflower 400 and the Women's Euros, and enabled the Southampton 2025 vehicle and UK City of Culture bidding journey with significant investment. As a result, there are strong regional partnerships in place and a desire to continue working together strategically on festivals and events and tourism.

As part of their business plan, GO! Southampton convene working groups for each of their four themes which are: Better Marketing, Culture, Events and Partnerships, A Greater City Centre Experience and Stronger Business. These engage with a range of business and strategic partners across the city.

Currently there is no single organisation or individual who has the responsibility for curating and programming the festival offer to ensure quality, relevance and impact. The strategy will require both leadership and resources for delivery. Additional fundraising and income generation will be required to support any agreed new initiatives and projects.

3. S.W.O.T.

The findings from the research and consultation have been gathered into a S.W.O.T (Strengths, Weaknesses, Opportunities, Threats) analysis of the context for festivals and events in Southampton.

Strengths	Weaknesses
• Ambition and drive to continue to develop strong UKCoC bid legacy and programme, albeit at a different scale and pace • Newly adopted Cultural Strategy and Destination Management Plan • Strong partnership working amongst city stakeholders and across Council • Excellent regional partnership working • Distinctive cultural USPs – which have not yet been brought together into a coherent narrative • Attractive to commercial event organisers • Well established, active and culturally diverse communities who are experienced in producing festivals and events • Strong international links • Well established but modest cultural and creative sector with distinctive strengths in live music, young people, visual arts, heritage, spoken word • Good range of event sites including green spaces in and near the city centre • A diverse range of events including a large number that have been	• Lack of clear vision for events shared by internal and external stakeholders, and communicated with residents and businesses • No Event Policy to guide departmental working within Council • Lack of regular home-grown events of scale and ambition. Over reliance on touring product • Some embedded bad practice that is counter to funding bodies policies – for example not paying artists • Over-reliance of the sector on volunteers and freelancers with very few paid staff • Sector limited in capacity to fundraise independently • Sector limited in capacity to collect and analyse data – economic, environmental, social • Very limited funding, advice and support to grow new ideas and support talent development – perception of risk aversion • Lack of quality control and curation • High number of local audiences unable/ unwilling to pay high ticket prices due to socio-economic circumstances

running for more than 10 years and with one signature festival (SIBS) • Engaged and enthusiastic audience who take advantage of opportunities to participate and large catchment area • High number of local suppliers already engaged with events • Excellent transport links, accommodation and hospitality offer for visitors • Experienced and knowledgeable operational Events team with strong relationships with stakeholders	• Most popular sites not fit for repeated event use and footfall (impact on grass/environment) and in high demand (Mayflower Park, Common is SSSI). Lack of complementary indoor conference facilities identified by some stakeholders • Historical restrictions and limitations on the use of key sites • Lack of communication across sector leads to diary clashes and competition for resources • Lack of central marketing and communication strategy means duplication of efforts (though this is to be addressed as part of the Destination Management Plan) • Limited access to the water makes maritime activity challenging • Comparatively small amount of Council funding for festivals and events (reflecting overall challenging financial position of Council) • Limited city-specific on-line information about event guidance, sites etc.
Opportunities	**Threats**
• New Destination Management Plan (DMP) and small dedicated resource provided by Council and to be led by the Culture Trust • Legacy from strong UK City of Culture programme, partnerships and opportunities • Culture, Events & Partnership strand of GO! Southampton to be aligned to other partnerships e.g. DMP, We are the Square • High numbers of potential audience from regional hinterland (2m) and from cruise ships (2m) and students (40k+) • City stakeholders could be brought together more formally to improve longer term planning • Excellent regional partnership working and interest in working	• Climate emergency – growing requirement to innovate with new approaches which requires resourcing • Potential resurgence of Covid-19 and lockdown measures • Changes in consumer/ audience behaviour threatens vibrancy of city centre • Increasing health and safety legislation and requirements increasing costs for event organisers • Proposed Protect Duty legislation may increase the financial burden on event organisers further • Highly fragile local sector with limited capacity to grow without sustained support and investment

together on product, packaging, promotion and sector support. Solent as a brand • Evidence of attractiveness of the destination from commercial event organisers • Two universities both already engaged with festivals and events but with potential to play a greater role • Businesses have offered support to the UKCoC bid showing that they will support if the offer is right • Excellent work with children and young people/ Child Friendly City ambitions • Night-time economy focus/ Purple Flag (decision pending) • BID's Accessible City group provide forum for consultation on accessibility • Invest in Mayflower Park (with appropriate surfacing), surrounding area and other purpose-built event spaces as part of regeneration/ public realm opportunities that reduces impact on Mayflower Park, SSSI Common, listed Central Parks and other green spaces. • Individual producers and organisations with great ideas and experience – but who require additional support to grow ambition • Large programme of public realm improvements planned over next 10 years creating new opportunities for event spaces and animation • Interesting built architecture and public settings – heritage, industrial, maritime and many green spaces • Strong neighbourhood identities and activity with good event sites across the wider city • City of Sanctuary status • Solent Apprenticeship Hubs	• Overreliance on external commercial operators with limited requirement to embed local impact • Many key sites have historic legal restrictions on use • Strong resident resistance to festivals and events in popular areas due to impact • Funding more competitive generally – Southampton is not a 'Priority Place for Culture' • Increasing cost of living puts added pressure on ability to pay for local audiences • Inclusion – 12% of residents do not speak English, growing numbers of people with long term disabilities – adaptions will need to be made for all to ensure inclusive, accessible and relevant • Changing political leadership can make longer term planning more difficult • Event team already at capacity with increasing income targets • Unsuccessful UKCoC bid, may result in loss of momentum and support for ambitious programme

4. The Strategy

The Strategy makes recommendations about how Southampton could achieve a rich, diverse and vibrant festivals and events offer with distinctive Signature Festivals known across the world, and a range of commercial, cultural and community led festivals and events of differing scales and stages of development. It will be a city where new ideas and approaches can flourish and be an attractive proposition for home-grown and visiting festival and event producers.

Stakeholders look to the Council to lead the strategy. The strategy's success depends on working collaboratively to deliver, including supporting the convening opportunities of the Culture Trust and the investment by founding partners in its continuation. It will also require the engagement of the sector and on other stakeholders playing their part and aligning their own business planning and resources.

This requires the articulation of a clear vision, priorities and a shared sense of the economic, cultural, and social impact that an enhanced festivals and events offer could have for the city. This Strategy aims to provide that and to make recommendations for specific objectives and actions that the Council and its partners can undertake in the short, medium and long term to deliver the strategy's ambition.

4.1 Vision

The proposed vision of the Strategy is:

So Vibrant, So Distinctive, So Welcoming, So Southampton Festivals

Southampton is a city with a distinctive and varied range of festivals and events that bring the City's unique identity to life and extends a warm welcome to all, whatever your interests and wherever you are from.

4.2 Areas of Focus

The themes, cultural strengths and principles, set out below, provide the mix of place-specific qualities that will help to ensure that the emerging portfolio is distinctive to Southampton. Together these form the 'Areas of Focus' of the strategy.

Encouraging festivals and events to describe how they meet these from the beginning will help the Council and other stakeholders to direct resources to gradually shape and curate the portfolio over time and to identify gaps and opportunities where intervention is required.

Themes	Cultural Strengths	Principles
• An international city • A diverse city • An innovative city • A welcoming city • A city of opportunity • A green cultural city	• Port City/Maritime • Multi-cultural and diverse • Young people • Electronic music • Live music • Urban culture • Heritage assets and stories that link to the world • Contemporary visual and performing arts • Creativity and innovation • Blue/ Green environment • Competitive sport • Participatory physical activity • Business to Business • Film and Cinema • Neighbourhood Fairs	• Access and Inclusion • Environmental Sustainability • Wellbeing • Financial Sustainability

4.3 Priorities
A shared understanding of priorities that all festivals and events should aim to meet will help to create a framework that can be adopted by different funders, partners and stakeholders. It will also help event organisers to describe and evidence the value of their festivals and events in a similar way.

Not all festivals and events will meet all of these priorities, and some will meet priorities to different degrees. However, the ambition should be that by 2030 there will be examples of good practice for all of these when the whole of the Southampton festival and events portfolio is considered.

The priorities are that festivals and events should aim to:

1. Be authentic, unique and of high quality to support the vision, focus and ambition of this strategy and put Southampton on the map.
2. Be relevant, maximising opportunities to develop audiences and partnerships on a local, regional and global scale.
3. Drive cultural place-making through animating new and under-used places across the city, and revitalising the city-centre with an offer that is year-round and supports the night-time economy.
4. Attract higher-spending visitors both domestic and overseas and encourage them to stay longer, come back and recommend Southampton to others.

5. Foster emotional connection by engaging communities, supporting wellbeing, building civic pride and local capacity through opportunities for participation and volunteering, ensuring access for all.
6. Actively contribute to addressing environmental sustainability challenges.
7. Be creatively innovative and sustainable, by producing new work and testing new ideas and approaches within a clear sense of future direction.
8. Strengthen the local and global connections of business, cultural and academic partnerships and networks.
9. Support professional creative, technical and management talent development through employment, training and showcasing.
10. Sustain and create higher value jobs and professions, including creating paid opportunities for creative freelancers.

4.4 Purpose and Impact

Different types of festivals and events will have different types of impact: Mega Events and Major Events may have good Economic impact but low Social Impact. Local Events may have profound social good but comparatively low levels of economic benefit. Many festivals and events will contribute across multiple domains, helping to lever additional value for the area. A strong portfolio will have a mix of different types of festivals creating different types of impact.

A standardised evaluation methodology and shared set of performance indicators will help guide Southampton’s decision-making and provide a methodology for measuring the collective impact and tell the bigger story of the value of festivals and events in Southampton.

Festivals and events impact can be understood through different domains:

- Cultural Impact: the positive impact in your practice/genre/area of interest, the creation and amplification of a sense of place and the increase in cultural capital.
- Social impact: the positive changes that happen in your local community and the increase in human, social and natural capital. Environmental impact is included in this area.
- Economic impact: the additional spend that takes place within an area as a direct result of staging an event. This includes the direct spend of the organisers and the audience inside an event, and indirect spend of money spent in the local economy.

Each of these domains are measurable so that indicators can be discussed and agreed at different stages from initial concept through to event planning and finally in evaluation. These can be embedded in funding criteria and negotiated as part of commercial contracts and site permissions.

Sensitively applied, this can be a useful planning tool for the Council and event organisers to help design the festival and event to be as impactful as possible. The level of impact that can be achieved will be dependent on the capacity of the organiser and the resources they have at their disposal.

Impact Area	Measure
Cultural	Quality and Ambition of the idea/ concept/ perception of audience
	Place-making - alignment to themes, perception of uniqueness and authenticity
	Local capacity building (arts, sports, food, other) - new opportunties/ commissions
	International profile and reach - partnership alliances around common interests e.g. India (cult/crea ind) Miami (cruises)
Social	Local engagement and community development - number and nature
	Skills development - volunteers, learning opportunities, skills gained
	Wellbeing - happiness, life-satisfaction, pride
	Environmental sustainablity impact and approach
Economic	Overseas visitor - number, bed-nights, spend, motivation
	Domestic audiences - number, spend, motivation
	Leverage - public, private, commercial, in-kind
	Employment and local services / suppliers spend
Organisational Capacity	Ability to deliver
	Quality of the plan
	Suitability of the site
	Financial viability/ risk
	Potential to grow

4.5 Indicators
Indicators and targets can be developed for larger events to measure the impact in a consistent way with a baseline established in year one.

Targets should be agreed with individual events for a minimum three-year period with progress formally reviewed annually to complement the planning cycle for Signature and Growth festivals and events.

The collection of this data requires significant resources so may only be suitable for larger events. Some of the indicators are aligned with existing civic, regional and national surveys but collecting data for key events will help make the case for festivals and events contribution to wider trends.

Cultural indicators might include:
- Number of new creative products and experiences
- Growth of creative businesses and freelance contracts awarded
- Number of regional/ national/ international partnerships
- Audience satisfaction and perception of quality
- Positive peer and industry response
- Positive media and social media coverage
- International export (ideas, contracts, touring)
- Civic pride
- Industry awards and recognition

Economic indicators might include:
- Footfall in key areas (links to BID footfall)
- Attendances for individual events
- Number of domestic and overseas visitors, their motivation to visit and stay longer (links to DMP data gathering)
- Employment and direct spend on suppliers and services
- Increase in inward investment and leverage

Social indicators might include:

- Cultural engagement levels (links to Active Lives Survey)
- Reported well-being – life satisfaction, worthwhile, happiness, anxiety (links to Annual Population Survey)
- Reported satisfaction, belonging, connectedness and safety (links to City Survey)
- Volunteer number, attraction and retention
- Reported skills and confidence attained
- Decrease in negative environmental impact

4.6 Portfolio Approach

The aim of the strategy is to achieve a balanced and mixed portfolio of quality festivals and events that put Southampton on the map and helps the city to be vibrant year-round, which celebrate and amplify its cultural assets and strengths, develops local pride and provides opportunities for local residents, businesses and visitors.

Taking the following factors into consideration will help decision-makers and enablers to discuss and agree shared priorities and address gaps.

Factor	Success Criteria
Festival Type	A mix of Signature, Growth and Local events with plans underway for Major events
Location	A vibrant city centre and strategic use of other parks and open spaces that allow time for rest. Considered alongside suitability of the event to the location
Seasonality	A year-round calendar of events with clear times of increased activity at key seasonal times in the year
Content	A portfolio that shows a balance of the City's cultural strengths and themes
Audiences	A portfolio that has a clear mix of events aimed at visitors/ local audiences or has the ability to engage with target audiences: cruise audiences, business, city-breakers and day visits (DMP)
Opportunities to Participate	A range of opportunities to participate across the portfolio for people of all levels in the chosen field of interest and activity (culture, sport, community)
Frequency	A balance of long-running and new festivals and events and activities alongside touring and occasional one-off events
Affordability and Accessibility	A balance of free, paid for and mixed festivals and events with clear accessibility routes in place for audiences with specific needs
Purpose and Impact	A balance of events that meet the desired Social, Cultural and Economic impacts
Strategic Focus	Prioritise events that link to current strategic priorities for the City – for example developing the night-time economy, creating a safer city and supporting the application to become a Child Friendly City. These are likely to change each year/ over periods of time.

5. Objectives

The Strategy should have the following Objectives.

5.1 Nurture a Diverse and Authentic Portfolio

The varied portfolio of successful festival cities and events destinations creates the eco-system that enables all festivals and events to thrive.

Southampton should aim to establish between 3 to 5 Signature Festivals by 2030 and foster a distinctive portfolio of 20 'Growth' festivals – all of which will be known outside the city. This will include both home-grown and external and commercial and cultural events. These will provide interest points in a year-round calendar of vibrant and dynamic range of local festivals and events, civic events and one-off and touring commercial and cultural events. Southampton will work with regional and national partners to secure Major Events with wrap-round cultural programmes ensuring that these celebrate and benefit the city's cultural and events sector.

Action Areas:

Harness the UK City of Culture Bid	The process of applying for the UK City of Culture bid has been transformative for the city and generated a range of distinctive creative ideas and programmes. It will be important to work with stakeholders and partners to identify what programmes can be taken forward as a positive legacy of the bid application process and kick-start the delivery of the strategy. This process will be collaboratively led by the Cultural Trust.
Adopt vision and strategy	Many different public and private partners, and different departments within the Council are involved in festivals and events. All partners should adopt the agreed vision and strategic framework set out in this strategy to facilitate joined-up but autonomous decision making and to curate an impactful programme over time. This includes the festival classification system and impact and evaluation framework to facilitate evaluation and forward planning.
Major Events	Southampton has demonstrated the ambition and capacity to host Major Events, and to play a prominent role in national and international programmes such as Mayflower 400 and the UEFA Women's EURO championship – being part of the national cultural programme. As a result of bidding for UK City of Culture, regional local authorities have expressed an interest in working together to secure future Major bid-for events. As most of the bid-for events are sporting, this will require the active engagement of the city's sporting organisations and associations. The universities will also have a role to play in bid-for events, levering their international connections and assets.
Signature Events	Signature Events support a range of economic, cultural and social impacts. They can be global ambassadors for a

	particular place attracting visitors and leveraging both project-based and long-term investment. All successful event destinations have a portfolio of Signature Festivals. Rotterdam has 3 (Rotterdam International Film Festival, NN North Sea Jazz Festival and World Port Days); Bristol has 4 (Bristol International Balloon Fiesta, MayFest, Bristol Harbour Festival and UpFest); Glasgow has 5 (Celtic Connections, Merchant City Festival, Glasgow International, Glasgow Mela and the World Pipe Championship) and Belfast has 4 (Belfast International Arts Festival, NI Science Festival, Culture Night and the Belfast Titanic Maritime Festival). The Southampton International Boat Show is the closest Signature Festival although more could be done to work with the organiser to develop stronger local engagement and impact. This may include the development of satellite events. The aim should be to develop between 2-4 additional Signature Festivals over the next 5 years with the expectation that at least one will be commercial and financially independent, one a new project and the others supported from the Growth portfolio.
Growth Festivals	Growth Festivals and Events help to keep the portfolio vibrant by investing in existing festival growth and testing new ideas and business models. These festivals and events may operate for a fixed number of years or grow into Signature Events. They should provide the context for professional and organisational development, capacity building and job creation, and should have clear strategic direction, target audience and growth. Growth Festivals include new ideas and product that meet identified gaps or opportunities. These ideas may emerge from the sector and from stakeholders. The ambition should be to identify potential Growth festivals and work closely with the organisers to develop 3-year business plans, identifying and securing stakeholder support and embedding KPIs and reporting requirements into funding agreements, MOUs and site permissions. This may form part of the ask for external investment from other funders.
Local Events	Local Events are incredibly important to the quality of life in a particular place and deliver a wide range of social outcomes. They play an important role in social cohesion and building stronger communities. They may also deliver significant health benefits through increased wellbeing for those people organising the events, taking part in other ways, or attending with family and friends. It is important to maintain and improve the annual grants programme to support local community festivals and events linking this to the strategy objectives and impact framework.

	Local community run events could also be supported through identifying more cost-efficient ways of providing organisers with support and advice (for example through online guides and sector led support such as mentoring). In Southampton, Local Events include a range of commercial touring product and attractions. These play an important role in the city's vibrancy and there is scope to work more closely with the organisers to identify ways in which their presence could support the wider ambition of this strategy and deliver on the identified impacts. These can be agreed and built into the permissions and asset use agreements.

5.2 Develop and Reach New Audiences

One of the most important drivers of impact and growth for festivals and events is improved audience insight and development supported through a coordinated marketing and communication strategy. Robust and effective audience evaluation is critical to understanding demand, audience expectation, justifying investment and telling the story of the economic, social, and cultural impact of festivals and events.

Rotterdam Festivals (RF) is an independent arms-length organisation that has responsibility for the strategic development and delivery of festivals and events, and which has helped make the city one of the most successful event destinations in the world. RF worked with the national government and university partners to develop a Cultural Target Audience segmentation tool to understand more about audience engagement and reach. Data from festivals and events is uploaded into the map and used to identify gaps, influence programme and direct marketing and communication resource.

Southampton has a large and diverse potential audience for festivals and events with an engaged local audience including a large student population, a relatively prosperous hinterland population and visitors attracted by the retail, leisure, sport and cultural offer. More than 2 million people coming to the city on their way to other destinations via the port and other transport terminals. Ensuring access and inclusion is a priority and underpinning principle for this strategy. The new Destination Management Plan provides an opportunity for improving the marketing and communication of festivals and events to visitors and residents.

Action Areas:

Improve audience data collection and insight	There is not a consistent way of measuring and evaluating audiences for individual events, or a way for information and insight to be shared across the sector. Stakeholders may want to consider commissioning research into improving how audience data is captured, shared and used to inform decision making. The universities may be willing to play a key role in this. In the short term this could be agreeing an audience evaluation format including a standardised simple audience survey, again linked to funding and asset agreements. In the longer term there could be a centralised ticketing system and service which collects audience data and may also provide an

	option for voluntary donations. Free events might incentivise pre-registration for events through exclusive offers.
Curate and co-ordinate marketing and communication of festivals and events	Southampton City Council and GO! Southampton work very effectively together on Visit Southampton which provides a space for promoting festivals and events across the city. In the short term this space could be more effectively curated with a calendar of key annual festivals and a higher profile given to key festivals and events (as defined through applying the strategy framework). This could form part of the Tactical City Campaign aimed at regional audiences. Tiered packages of marketing support should be developed that can be paid for by commercial event organisers (as has been successfully developed with Wela Markets) or offered up as quantified in-kind support.
Develop a social media strategy for festivals and events	The majority of festivals and events are self-contained in terms of their marketing and communication and this makes telling the wider story of festivals and events challenging. Facebook, and Instagram were popular forms of relatively low-cost marketing amongst the festivals surveyed. A central social media strategy around the core vision of the strategy #SoSouthamptonFestivals would help to support smaller festivals, promote a year round offer and extend reach.
Embed festivals and events in itineraries	A map and calendar of festivals and events has been developed in the course of this strategy with key events identified as being of most relevance and interest to audiences. This information should be utilised as part of the DMP to build new half-day, whole day and 2-3 day itineraries and packaged to target visitor audiences. This should include itineraries designed for pre- and post- stays and transit passengers.
Profile the festival offer to business and academic conference partners	Business tourism is an identified audience within the DMP. There are proposals to develop a Conference Ambassador programme amongst the city's leaders and academics to raise the profile of Southampton in specific strong and relevant sectors. There should be an awareness raising campaign about festival and events aimed at Ambassadors including presentations about specific festivals and events. Conference focused information should also be shared with festivals and events who may be able to lever their own networks to support increase in business tourism – for example Seawork and Music in the City who both have very strong industry links.
Improve city centre visibility and signage	The bid for UK City of Culture illustrated how effective a co-ordinated and highly visible campaign can be. High profile city signage, wayfinding and wayfaring also helps to promote individual events and alert residents to any upcoming disruption. There should be greater clarity about how festivals and events can access city signage and poster sites and in

	due course a curated approach that profiles key festivals and events. This dovetails with the DMP.
Improve access	All major stakeholders and funders put an increasing focus on ensuring access and inclusion to cultural events and the ageing population and diverse needs means that commercial events also recognise the importance of ensuring good access for audiences. 44% of the festivals surveyed would like more information about Diversity and Inclusion. GO! Southampton has an aim to create a more inclusive city centre through co-ordinating an Accessible City group and this may be a useful forum and focus group for organisers wishing to put on events in the city centre. The Child Friendly City and Purple Flag designations are other opportunity to embed good practice in festivals and events that support these initiatives. In the longer term, Southampton might develop Accessibility Toolkits for all event organisers, as Rotterdam has done.
Increase sustainable travel	Finding out more about Environmental Responsibility was another high priority for event organisers (44%). The biggest environmental impact of festivals and events is caused by attendee travel as well as on parks and green spaces. The Green City and Infrastructure Team at the Council hold the responsibility for transport infrastructure and have excellent strategic relationships with transport providers including the bus service. Generally, the bus operators are supportive of events but require more clarity and predictability. Having a core event calendar in advance would help to mitigate some of this impact and support joint planning. The Council has developed a new journey planner app called 'Breeze' which provides the opportunity for a more joined-up approach with event organisers and potential audience incentives – for example in packaging and promoting events and sustainable transport options, possibly as part of the itineraries proposed as part of the DMP.

5.3 Nurture an Inclusive and Productive Sector

Festivals and events are complex cultural products which have a complicated range of stakeholders and a high level of risk. A vibrant, diverse and sustainable portfolio of festivals and events relies on a knowledgeable, experienced and professional sector.

The popularity of festivals and events in the UK is huge and growing again post-pandemic. The events sector is estimated to be worth £70billion to the UK each year with more than 5 million attendances at festivals in 2018. This means that there are opportunities across the UK for experienced festival producers, event managers technicians and in all parts of the supply chain.

The Festivals and Events sector in Southampton is hugely diverse ranging from creative entrepreneurs to voluntary-led community organisations and large corporate businesses. The sector will need a range of different support mechanisms in order to develop the capacity and connectivity to play an active role in delivering this Strategy.

Action Areas:

Support for organisations and businesses	The sector has expressed a need for access for advice and support earlier in the event planning process to help them to maximise opportunities and improve quality and impact. Stakeholders should look at how this support can be provided for key events. Alongside this in the longer term it is proposed that resources are identified for a training and development programme, potentially working with industry, universities regional partners and the Local Enterprise Partnership. This could range from on-line toolkits and group sessions to one-to-one support, mentoring and training. Sessions might include governance and business planning, fund-raising and commercialisation, audience development, access and environmental responsibility.
Support for freelancers	Many successful festivals and events are organised by creative producers who can work with communities, cultural organisations, businesses and/or local authorities to design and curate strategic creative festival programming. These are usually fixed-term, project-based freelance contracts and it is important that these are paid roles. A special training and development programme could be run for producers and freelancers alongside the support for organisations. Southampton may want to consider the feasibility of a Producer Incubation Hub, providing bursaries and office space to graduates or start ups. Successful producers accepted onto the graduate programme would be paired with festivals seeking to grow their capacity and work with these festivals for a specific period under the guidance of a mentor. There is also an opportunity for individuals to benefit from the advice from the newly established British Library Business and IP Centre based in Central Library Civic Centre.
Support for volunteers	Volunteers play an important role in all aspects of festivals and events from leadership and governance to supporting roles for professional-led events. Volunteer networks can help to reach deep into communities and engage those most marginalised from taking part. The sector reported some challenges around recruiting and retaining volunteers and there are opportunities to work more closely with Southampton Voluntary Services (SVS) in this respect. It would be useful to share good practice around volunteers and have agreed volunteer policies shaped and adopted by festivals and events. Another innovation could be an online register of volunteers. Bristol Festivals is an independent membership organisation and provides access to a volunteer database for its paid up members as well as providing central support and advice for training and working with volunteers.
Engagement with young people	Southampton has a number of organisations that work with young people to support their creative and cultural development including, for example, schools and colleges

	pursing Artsmark awards, Artswork, Southampton Music Service and Music Hub, City of Southampton Orchestra, Southampton Cultural Education Partnership (SCEP), University of Southampton hosted Connecting Cultures consortium project, Southampton Education Forum and the SoCo project. Festivals and events provide an excellent opportunity for developing creative, technical and soft skills which improve outcomes for young people. Ideas for how this might be harnessed include a signature festival that is co-created with young people, celebrates young people's achievements, fosters greater partnership working between the commercial and cultural sector that levers larger events to provide showcasing and training opportunities for young people and a summer long season of work that is produced and programmed by young people, such as Palmerston Park bandstand.
Festival & Events Forum	Generally, there was a great deal of support for the idea of a Festival & Events Forum (53% Yes and 47% Maybe). The Forum would be a space for greater collaboration and networking, a forum for rolling out training and development and a more effective mechanism for liaising with the Council and other stakeholders as a single sectoral voice. The Forum may require coordination from the Council in the short term, based on the model established by Belfast City Council. In the longer term, once its usefulness has been established, the Forum could be supported by the Culture Trust and build on the Bristol Festivals Ltd model which provides office space, pooled equipment and other services to its members and which undertakes fundraising and lobbying activity to support city-wide projects. The Forum should meet at least twice a year.
Hosting industry meetings	The Southampton festivals and events sector is generally well-networked regionally, nationally and internationally. Organisers are active members of industry groups such as the South Coast Events Forum, the Association of Independent Festivals, CVAN, BFI Fan Network and of informal knowledge exchange groups such as the national networks of Pride Festivals, Black History Month and youth music organisations. Southampton should aim to target and host annual conferences, AGMs and meetings of these groups to increase awareness of the city's offer to industry, raise the profile of local organisers and attract business visitors to the city. This dovetails with the work of the DMP to increase MICE (Meetings, Incentives, Conferences, Exhibitions) activation.

5.4 Invest in Vibrant and Sustainable Spaces

Southampton is well served with a range of attractive and accessible sites for festivals and events of all types and sizes. This makes it attractive as a destination for visiting event organisers and provides a rich and varied context for the development of distinctive home-grown festivals and events.

However, some key spaces are in huge demand and with sensitivities and restrictions which can limit their use. Key sites are in need of investment to make them fit for purpose and support the aims of this strategy. Other spaces are currently under-used and un-tested. There is a large programme of public realm improvements planned which could create new event spaces and provide the conditions for future animation. The city's parks are also excellent locations for events, for example Hoglands Park, but need clearer guidance for event organisers and recognition of the impact on the ecology. The city centre is a key event space with a number of stakeholders involved in programming, managing and funding events through the year.

Action Areas:

Mayflower Park	In a city with very limited public access to the sea, Mayflower Park has been identified as a key signature site for festivals and events and hosts 2 of the largest events, SIBS and Seawork. Mayflower Park has been the subject of various attempts to develop a Masterplan for the area and should this be initiated again this could be an opportunity for holistic re-development that attempts to mitigate negative impact on residents and park users. A city-wide Masterplan should involve key event organisers in redesign and development, alongside other stakeholders. Previous proposals had included a purpose-built indoor event facility that, if desirable, feasible and sustainable, could also support the city's cultural and destination ambitions.
Palmerston Park	The bandstand in Palmerston Park is underused and is a good opportunity but requires investment to improve its appearance and infrastructure and to support high quality content. It would work well as a summer season of regular events and could be utilised to showcase and develop the skills of young people. Palmerston Park is Grade II listed and in a residential area so the Parks team and residents would need to be engaged in shaping the development and programming scope.
City Centre Events Group	There is a desire for year-round animation in the city centre and drivers to increase footfall and the offer at key times of the year such as summer and over the Christmas period. A range of stakeholders are involved in events in the city centre including the Council, GO! Southampton, Westquay and major cultural partners in the city. Joint planning and working could be facilitated through a formal City Centre Events group to meet twice yearly using this strategy as a guide for decision making. The City Centre group might want to consider pooling resources to co-commission new activity which would help to foster greater knowledge exchange. Bristol City Council has recently launched a £300k open call for new events to animate

	the city centre with awards of £15k to £50k funded through the Cultural Development Fund.
Public Realm planning	There is a large programme of public realm improvement planned over the next 10 years that involves both the public and private sector. Events can be helpful in testing ideas, supporting consultation and in animating new spaces. It would be useful to develop a list of preferred requirements for new spaces so that they can support events in the future, and to build in resources for cultural event animation into planning applications via Section 106/ CIL (Community Infrastructure Levy) contributions. The engagement of the Green City and Infrastructure team will be essential in embedding this into current and future public realm plans.
Location Guides	One of the most interesting innovations that arose from the international case studies was from Rotterdam. Rotterdam Festivals work with city council departments (Parks, Traffic, Tourism) and local resident groups to create Location Profiles for all event sites which are made available online. A Location Profile consists of two parts: the desired programming/ ambition of the city and the management aspects and physical properties of the locations. For frequently used locations, binding Location Profiles set out the number of events, the number of visitors, the maximum noise exposure and the rest and recovery times. The Profiles gives both clarity and inspiration to organisers and helps ensure that the event and location fit together. The profiles are evaluated every two years with input from partners and users and adjusted if necessary (an example Location Guide for Rotterdam is included as an appendix). The Council may want to develop detailed Location Profiles for all event spaces in the city beginning with a pilot programme focusing on a small number of key sites, developed and iterated with the sector, partners and residents.

5.5 Improve Policy and Processes

Southampton City Council enables and supports festivals and events in a wide range of ways across different departments. Culture & Tourism lead on more transformative cultural programmes (such as UK City of Culture) that seek to enriching the city as a destination, as well as a key role in managing and supporting events of all types through the Events team; Parks enable access to key green spaces and guidance on environmental protection and waste management; Communications provide marketing support, and Green City and Infrastructure support the development of public realm and traffic and transport management.

Communication across departments is often informal and relies on good relationships between individual officers. Inevitably there will be occasions of competing departmental priorities and it is not always clear how support for festivals and events fits into these.

Festivals and events also impact on other areas of the Council's work with communities, health and wellbeing, economic development and businesses, and there is not always a coherent sense across the Council about why festivals and events are considered important, and what they do for the city.

Action Areas:

Develop an Events Policy	The Events Policy would set out the commitment of Southampton City Council towards festivals and events and be developed with the input of the different departments and teams involved. This would include the rationale for why festivals and events are important for the city, the approach and ambition set out in the strategy and define the roles of different officers in the event planning cycle.
Strategic Events Group	Alongside the Events Policy it is recommended that there is a formal senior officers' group where festivals and events are discussed on a regular basis. This group would consider and review the upcoming calendar to identify gaps and challenges and be a forum where key larger and strategic events can be discussed in advance of going to the Safety Advisory Group. This could be either a new group or the inclusion of festivals and events as an agenda item on the existing Culture Board or other Corporate meeting. This group or discussion should take place at least twice a year.
Embed impact in commercial contracts	Many events in Southampton do not require or are ineligible for public funding which makes it more challenging to capture value. It is recommended that the portfolio approach is used to make decisions where there is competing demand for spaces, and that the Impact criteria is embedded in site contracts with a requirement for organisers to collect and share data in an agreed format with the Council or commissioning partner.
Embed impact in funding programmes	The Council has a comparatively very small budget for festivals and events. It should seek to sustain and grow the support in partnership with others. The impact criteria should also be developed into a funding requirement, with provision made for the amount of award, the size of the event and the capacity of the organiser. For example, small Local Events would not be expected to conduct an audience evaluation survey. All organisations receiving public funding should be required to provide a brief evaluation report. This could be collected via an online form to help to ease the administrative burden for organiser and the Council and to assist with the collating of information across the whole portfolio. Other partners in the city who manage and fund events such as GO! Southampton and Westquay should be encouraged to collect data in the same way.
Develop new funding programmes with partners	The Council and the Culture Trust have excellent relationships with other potential funders and partners including Arts Council England and the National Heritage Lottery Fund, and there are other funding opportunities that only local authorities or

	charitable organisations are eligible to access. The UK City of Culture bid secured the support of major business partners such as APB who already sponsor the Southampton Marathon. Other private partners in the city also invest in festivals and events. These provide an opportunity to lever the existing festivals grants budget and match it with public or private funding to run an open grants scheme aimed at meeting joint strategic priorities, and possibly themed – for example heritage projects. Consideration should be given to tiered funding streams that will support smaller project (with awards of under £1k), medium projects (awards between £1k - 5k) and larger projects (awards of £5k plus with an expectation of at least 1:1 match funding).
Formal charging policy for event spaces with different levels for commercial, cultural and community events	The Council has annual income targets for site hire from events. This target has increased over recent years and it is critical that income is sustained or increased. The Council does make provision for lower or no fees for community events but this is negotiated at officer level. This should be formalised and included within the event policy to ensure fairness and transparency and to protect individual officers. Consideration should be given to both the type of organisation and its ability to pay and the nature, purpose and impact of the event with different levels for community, commercial and cultural sector led events. Consideration should be given to reserving income from event sites for investment into the strategy.
Increase understanding of holding powers	Research into existing holding powers into key sites and investigate whether these are still relevant to the city's needs and ambitions.

5.6 Leadership and Delivery

Southampton City Council is a key stakeholder across all aspects of festivals and events and has excellent relationships with city partners, and with the sector. The Council will therefore play an important role in leading the implementation of this Strategy in the short term and in sustaining the engagement and input of partners. This should be led by the Culture & Tourism team and developed alongside the Destination Management Plan which shares many of the same goals.

The future development of the strategy will need to be closely aligned with the ambition and business plan of the strategic Cultural Trust in order to harness the partnerships and ambitions developed during the process of bidding for UK City of Culture.

Action Areas:

Festival and Event Working Group	This strategy has been developed with the input and guidance of a steering group who have brought expertise and ambition to the process and who have key roles to play in the strategy's delivery. It is recommended that this group continues to meet to oversee the strategy's implementation. The Festival and Events Working Group should meet quarterly with reports being fed into the following groups:

	• SCC Strategic Events Group/ Culture Board • Cultural Trust Board and Destination Partnership • GO! Southampton – Culture Events and Partnerships group The Festival and Events Working Group would provide a link through to these groups for the wider sector via the Festival & Events Forum, once this is established. This group would be initially chaired by Carolyn Abel, Head of Culture and Tourism at Southampton City Council.
Support the Culture Trust	The Culture Trust will help to ensure that the strategy can deliver a festival and event portfolio of artistic quality, relevance and ambition. This may be through leading the development of new festivals and events, brokering new relationships with the national and international cultural and commercial sector and securing new investment for culture, festivals and events. The Trust will also help to identify new opportunities emerging from within the city. It is envisaged that the Trust will lead the strategy in the longer term and this should be embedded in future work plans.
Appoint a Place Curator	One of the key ideas that emerged from the strategy was the need for a stronger curatorial approach to the festival and event calendar. This strategy proposes a curatorial framework that will support individual and collective decision making but assessing and improving artistic quality through a framework is challenging. Thought should be given to resourcing and recruiting a 'Place Curator'. This role would provide artistic direction to all cultural activity in the public realm including festivals and events and public art. They would do this through harnessing the expertise of the city's main cultural partners and artists and inviting national and international experts to engage with the programme. The Place Curator would ideally sit within the Culture Trust.

Appendix 1: Rotterdam Location Profile

Example:
Parkkade (Park Quay)
Capacity 5,000 – 10,000

1. Starting point (ambition of the city, renewal)
The water area is the origin, the soul of Rotterdam. It is a ‘gateway to the world.’ In addition, the wetland (former port area) the capital/gold of the city and of large symbolic and economic value. The Erasmus Bridge and the Willemsbrug are the symbol of innovation; the new Rotterdam; the connection of north and south. By the connection, the city is one whole. The Waterfront is an important symbol for the profile of the city.
The Waterfront can be divided into the following locations:
• Boompjes & Boompjeskade
• Willemsplein
• Leuvehoofd
• Willemskade / Ferry harbour
• Park quay
• Westerkade
• Square 1940

2. Profile from the power of the place
The Parkkade is a sturdy quay between the monumental Park of Zocher and the Meuse.
Parkkade remains a favorite mooring place for coasters and other interesting seagoing vessels.
The interior on the quay is therefore sturdy and grand, with generous colorful grass surfaces. There is space to lie down or to sit and watch the boats and the river. Access to the Park is facilitated, among other things by a new staircase in the middle of the quay. The environment of the monumental filter building of the Maastunnel will have a garden-like environment in line with the refined and unique architecture.

Desired programming matching profile
• Programming can tie in with the activity that is already in the area from the restaurants and cafes.
• The Parkkade invites you for programming that matches activities in Het Park that reflect and strengthen the atmosphere of both locations.
• In addition, the location can be part of larger events taking place in the area from the waterfront to a limited extent.

3.1 Management aspects:

Physical characteristics of the place (surface, facilities)
• Urban harbor quay.
• Layout as a quay. Ships dock regularly.
• There is no camera surveillance.
• Natural stone (and therefore not suitable for heavy loads).
• Lots of green bins, trees, and street furniture, these must be kept free and organizers must take this into account when designing the site.

• Fire hydrants are limited.
• Calamity jetty is available (opposite the Ballentent). Space around this must be kept free.
• The Parkkade is the only free berth for seagoing vessels in Rotterdam. In coordination with the Port Authority Rotterdam an exception can be made for holding an event.
• Lighting: ordinary, public street lighting.

Size
Gross surface, excluding carriageway, approx. 9,000 m².

Type of environment (residential area/location)
• Access road.
• Recreational waterfront.
• Next to Het Park, around the corner from the Euromast.
• Further away from (icon) Erasmus Bridge, but with a view of Wilhelminapier with De Rotterdam and Hotel New York.
• The entrance of the bicycle tunnel to Rotterdam South is adjacent to the Parkkade.
• Coordination with entrepreneurs (Parkheuvel, Ballentent, Dennis Snackbar and Scorpio) and residents in the area is necessary.

Pitches
N/A

1.2 Management aspects

Safety Crowd management options
• Reasonably easy to make (physical) separation, so regulation of access is possible.
• There are sufficient escape options for visitors.
• It should be borne in mind that with any calamity on the Nieuwe Maas, whereby hazardous substances are released, the event area must be immediately cleared.

Accessibility (accessibility for emergency services)
The organizer must check with the Port Authority whether there are any ships dock, if this is the case, five meters from the quay will be kept free for the skipper's path and five meters for the emergency route (so a total of ten meters).

From the police and the VRR (Rotterdam Security Region) it is advised to follow the calamity route / skipper's path fences, because the water in the Nieuwe Maas is life-threatening.

3.3 Management aspects: Traffic

Accessibility public transport
• Tram stop at 15 minutes walking distance.
• In general: not easily accessible by public transport.

Other traffic aspects

• Type of road: quay.
• Lane must remain free.
• Traffic impact at entire closure: traffic impact for the Scheepvaartkwartier is very large.
• Traffic impact with partial lane closure: major.
• Important traffic junctions in the immediate vicinity due to flow during event: none.
• In connection with drivability: never close at the same time as: the Scheepstimmermanslaan.
• The roadway must be kept clear.
• Emergency route emergency services.

3.4 Management aspects: Construction activities/ Refurbishment

Construction projects in progress
Maastunnel work (2017 – 2018).

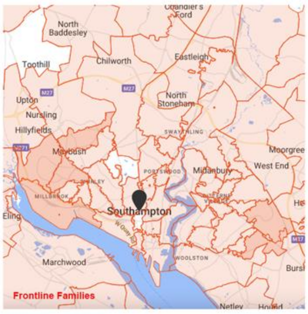
Outdoor space projects (redevelopment) and intended start performance
Work Parkkade (2015 – 2017).
It is still unclear when the refurbishment of the area is started. The ambition for the refurbishment is as follows (link to planning application).

Appendix 2: Audience Agency Map

Higher engagement

Medium engagement

Lower engagement



This page is intentionally left blank

DECISION-MAKER:	**CABINET**
SUBJECT:	**TRANSPORT FOR THE SOUTH EAST – STRATEGIC INVESTMENT PLAN**
DATE OF DECISION:	**FEBRUARY 7TH 2023**
REPORT OF:	**COUNCILLOR KEOGH** **CABINET MEMBER FOR TRANSPORT & DISTRICT REGENERATION**

CONTACT DETAILS				
Executive Director	**Title**	Executive Director Place		
	Name:	Adam Wilkinson	Tel:	023 8254 5853
	E-mail	adam.wilkinson@southampton.gov.uk		
Author:	**Title**	Strategic Transport Planner		
	Name:	Emma Baker	Tel:	023 8083 3948
	E-mail	emma.baker@southampton.gov.uk		

STATEMENT OF CONFIDENTIALITY		
NOT APPLICABLE		
BRIEF SUMMARY		
This report highlights the outcome of the Transport for the South East (TfSE) consultation on its draft Strategic Investment Plan (SIP) undertaken between June and September 2022, including how feedback provided by Southampton City Council has been integrated into the final SIP. The report also recommends that the final SIP is endorsed by the Council, as a member of TfSE, and as an important tool in securing future investment in the City, the Solent and the wider South-East.		
RECOMMENDATIONS:		
	(i)	To endorse the final Transport for the South East Strategic Investment Plan, as a wider plan complementing the Connected Southampton Transport Strategy, and to recommend its approval to TfSE Partnership Board.
REASONS FOR REPORT RECOMMENDATIONS		
1.	As a member of TfSE, the Council has had the opportunity to help shape the development of the SIP, including making sure it is aligned to local and Solent-wide aspirations as set out in the Connected Southampton Transport Strategy and wider Council strategies. The SIP will also be used to lobby Central Government for future transport funding and to develop business cases for strategic infrastructure projects. Further to consultation on the draft SIP, TfSE has updated the document to reflect feedback, including comments submitted by the Council. The Council is committed to continuing to work with TfSE to secure investment in the South East and to fully understand the impacts of delivering the proposed interventions set out in the SIP.	
ALTERNATIVE OPTIONS CONSIDERED AND REJECTED		

2.	Do-nothing – not recommended. If the SIP is not endorsed by its constituent members the region would lack collective support for the pipeline of transport schemes and impact the ability to secure and justify investment in the region, from Central Government and other potential funders, and to develop business cases up to 2050. This could impact the city's and region's ability to deliver local and strategic projects outlined in the Connected Southampton Transport Strategy and the SIP, including our ambition to create a Southampton Mass Transit System (SMTS) with frequent and metro-levels of service. The SMTS is dependent upon other 'enabling' interventions located on the wider Solent rail network, which are also included in the SIP.
DETAIL (Including consultation carried out)	
3.	Transport for the South-East (TfSE) was established as a Sub-National Transport Body in 2017. The purpose of the Body is to work with partners, including 16 Local Transport Authorities (LTAs), 5 LEPs and other stakeholders, to determine and secure investment in transport priorities for the area. Under the Devolution Act, TfSE submitted a proposal to Parliament to become a statutory Body with additional powers and responsibilities in July 2020. This application process was subsequently paused leading to TfSE continuing to operate in a non-statutory or 'shadow' form and having no powers to deliver transport improvements. TfSE will seek to resubmit its proposal for additional powers and responsibilities in the future. TfSE continues to acts as 'one voice' for the region when influencing Government decisions and has developed a Transport Strategy setting out the high-level and collective ambitions of its members. The SIP builds on the Transport Strategy by setting out the investment priorities for the region up to 2050.
4.	**TfSE Transport Strategy** The Transport Strategy for the South-East, adopted in 2020, sets out the overarching, high-level transport vision and objectives for the area, covering the New Forest to Dover, and Isle of Wight to Reading. The vision is: "By 2050, the South-East of England will be a leading global region for net-zero carbon, sustainable economic growth where integrated transport, digital and energy networks have delivered a step-change in connectivity and environmental quality. A high-quality, reliable, safe and accessible transport network will offer seamless door-to-door journeys enabling our businesses to compete and trade more effectively in the global marketplace and giving our residents and visitors the highest quality of life." Over the last two years, TfSE has built upon the Transport Strategy by developing and publishing detailed strategies, including the Future Mobility Strategy (2021) and the Freight, Logistics and Gateways Strategy (2022), in collaboration with its partners.
5.	**Strategic Investment Plan** The Council has been working closely with TfSE and other partners to develop the Strategic Investment Plan and its supporting evidence base, including packages of interventions for four geographical areas, including the

	Solent and Sussex Coast. The SIP builds on the Transport Strategy by setting out the long-term investment framework for transport up to 2050 based around eight priorities: • Decarbonisation and the Environment, • Adapting to a New Normal, • Levelling Up Left Behind Communities, • Regeneration & Growth, • World Class Urban Transport Systems, • Transforming East-West Connectivity, • Resilient Radial Corridors, and • Global Gateways and Freight The package of interventions for the Solent and Sussex Coast are based around local and strategic rail (Core and Enhanced Rail), Mass Transit, Active Travel and Strategic Highways. A summary of interventions for Southampton and their alignment with the Connected Southampton Transport Strategy is included in Appendix 2. An Integrated Sustainability Assessment was undertaken by TfSE as part of the development of the SIP and considers the high-level impact of the proposals on the environment, health, habitats, equality and community safety.
6.	**Consultation & Engagement Activities** Consultation on the draft SIP took place over twelve weeks between 20 June and 11 September 2022. TfSE received 639 responses to the consultation from a wide range of stakeholders, including constituent authorities, local enterprise partnerships (LEPs), district and borough councils, MPs, national agencies, neighbouring authorities, user groups, operators and members of the public. People were able to respond to the consultation via an online survey, which was supported by a parliamentary reception, TfSE's 'Connecting the South East' event in Guildford and two public webinars. The consultation was widely promoted by TfSE and its partners, including SCC which encouraged residents and stakeholders to response to the consultation via existing My Journey media channels.
7.	**Consultation Highlights** Highlights from the SIP consultation include: • 68% of all responses received via the digital platform were residents. • 34% of respondents, who participated by email or letter, supported more investment in public transport • Support for Active Travel varied between 51% and 79% across the four geographical areas. • 76% of respondents agreed that 'Decarbonisation and the Environment' is the most important investment priority. • 49% of respondents said they 'somewhat' or 'definitely' agreed that the SIP makes the best case for investment in transport infrastructure. Analysis related to the extent inventions in the Solent and Sussex Coast delivered on the SIP priorities also showed: • 58% somewhat or definitely agreed for Solent and Sussex Coast, with 15% definitely disagreeing.

	• Rail schemes were the most supported interventions, followed by mass transit and active travel. • Proposed highways schemes were the least popular. • The most frequent comment for this geography was a desire to see more sustainable modes of transport prioritised, followed by a greater focus on active travel.
8.	**Summary of Changes** Following a review of the feedback by TfSE, the main changes to the final draft SIP are summarised as: • More detail provided on the purpose of the SIP and what the SIP won't do; • Provided clarity that the financial ask of the SIP is above and beyond the funding that Local Transport Authorities already receive; • Asserted the need to ensure that public transport provision returns to the quality of provision prior to the Covid pandemic; • Updates to investment priorities section to reflect feedback on the priorities; • Strengthened the focus on decarbonisation and the environment throughout the document, including making it clearer that addressing climate change is a main aim of the SIP; • Greater recognition of the importance of strategic active travel and mass transit; • Clarification that highways are multi-modal assets, supporting active travel and mass transit interventions as well as freight movements; • Made amends to the narrative for coastal areas to reflect the challenges that transport can help address and the opportunities that it can unlock; • Strengthening the narrative around key priorities that support health and wellbeing; • In recognition of the current financial situation, the funding and finance section has been updated to reflect that the SIP is a live document and costs will need to be updated as individual schemes are taken forward; • Clarification that transition of freight to rail will not be of detriment to passenger services; • Changes and clarification to information on proposed interventions to reflect comments received; and • Updates to the delivery stages and next steps of the SIP to set out how the SIP will be implemented, delivered and monitored. A link to the meeting papers for the TfSE Shadow Partnership Board in November 2022, including a report summarising the consultation results, is available at the end of this report.
9.	**SCC Feedback** The Council submitted feedback to TfSE on the draft SIP after the draft response was reported to Cabinet in November 2022. Our response was broadly supportive of the SIP and the proposed interventions, but noted concerns regarding the unknown impacts of large major schemes, specifically the proposed rail tunnel under the River Itchen. Feedback from the consultation including comments provided by SCC have been integrated into the revised document, including our recommendation

	that consideration is given to the health and welling benefits of the proposed schemes. TfSE have also clarified that periodic updates to the SIP will provide opportunities for stakeholders to identify new schemes that could be integrated into the SIP as part of a future update. TfSE has also noted project specific comments submitted by the Council, including uncertainty on the impacts of proposed strategic/enhanced rail interventions set out in the Solent and Sussex Coast package. Our response to the consultation acknowledged that these interventions could support our local ambitions for a Southampton Mass Transit System, but highlighted concerns regarding potential impacts. These will be better understood if and when proposed schemes are taken forward as part of the design process, which the Council supports. This will include undertaking statutory assessments on the environment, health, habitats, equality and safety as required by legislation and consultation and engagement with a range of stakeholders.
10.	**Next Steps** TfSE has asked its members, including 16 LTAs, to consider and endorse the SIP through their respective Committee processes before it is considered and recommended for approval at TfSE Partnership Board in March 2023. By endorsing the SIP, the Council is demonstrating its support for the long-term investment framework and commitment to work in collaboration with TfSE to realise the SIP investment priorities. The Connected Southampton Transport Strategy will remain the key policy document for the city and the SIP will complement the strategy by setting out strategic priorities for the region. The collective endorsement of the SIP by TfSE members will show Government and other funder providers that there is a strong and joined up approach to future investment across the region. Once approved, TfSE will submit the SIP to the Department for Transport, who provide TfSE with an annual funding settlement. The SIP can then be used as a funding tool by TfSE and its stakeholders, including SCC, to secure future investment in transport across the South East, including the proposed interventions outlined in the geographical packages. It should be noted that scheme promoters, such as SCC, other LTAs and national infrastructure providers, including Network Rail and National Highways, will be responsible for seeking funding in the short-term and that TfSE will support bid development. However, TfSE's role may change in the future if it becomes a statutory Sub-national Transport Body. This could result in TfSE taking on a greater role in securing future funding to deliver the aspirations set out in the SIP in partnership in collaboration with its partners, including SCC. Individual projects from the SIP will be taken through the scheme development process by their promoter such as SCC. This would include business case development for funding, consultation and engagement with residents and stakeholders and undertaking more detailed assessments, as required, to understand any impacts on environment, health, habitats, equality and community safety.
RESOURCE IMPLICATIONS	
Capital/Revenue	
11.	The development of the SIP and the supporting evidence base has been funded by TfSE. This has been met through annual partner subscription

	contributions, which are set and agreed annually by the Shadow Partnership Board. The Council contribution, which is funded through SCC Transport Policy budget, is £30,000 per year. In addition to the Council's subscription contribution, the Council provides support to TfSE in the form of officer and Cabinet Member time through attendance at meetings and reviewing outputs from work programmes. As a Sub-National Transport Body in shadow form, TfSE also receives an annual funding settlement from the Department for Transport that is currently used to fund the wider technical work programme.
12.	The decision to endorse the SIP by SCC does not create any additional/new budgetary pressure or requirement and therefore does not affect essential spend criteria.
13.	The SIP is an important tool that will be used by TfSE, and its partners, to lobby Central Government for investment to deliver the ambitions and measures set out in the SIP, including £11.2 billion for measures identified in the Solent and Sussex Coast Area Study and £45 billion for the collective TfSE area. The development and delivery of the proposed measures set out in the SIP will be subject to future revenue and capital funding being secured from various sources, including Central Government. As part of the SIP evidence base, TfSE has considered how the SIP packages could be funded and financed in a phased approach up to 2050. The scheme promoters, such as SCC will be responsible for seeking funding opportunities for schemes arising from the SIP for which TfSE will provide support for bid development. These funding opportunities may come with match funding requirements which will fall to the Council to meet, these needs will be addressed as and when the bid opportunities arise at which time appropriate approvals will be sought.
<u>Property/Other</u>	
13.	None
LEGAL IMPLICATIONS	
<u>Statutory power to undertake proposals in the report</u>:	
14.	TfSE is a partnership reliant on the statutory powers of its constituent members to act within their respective areas. It is currently operating as a non-statutory body, following a pause in the application process for statutory status to the Department for Transport in 2020. TfSE continues to speak to and lobby the DfT on behalf of its partners, including Southampton City Council.
15.	TfSE member Local Transport Authorities are currently taking the final SIP through their respective governance processes. The final SIP will then be reported to the TfSE Shadow Partnership Board for adoption in March 2023. Once approved by the DfT, TfSE will use the high-level, long-term strategic framework set out in the SIP as a tool to continuing lobbying the Department for further investment in the South-East.
<u>Other Legal Implications</u>:	

16.	As part of the development of the SIP, TfSE has undertaken an Integrated Impact Assessment on the high-level objectives and measures set out in the Plan. An Equality and Safety Impact Assessment has also been undertaken on the recommendations of this report. More detailed Equality and Safety Impact Assessments will be undertaken for individual projects as they are taken through the design process.
RISK MANAGEMENT IMPLICATIONS	
17.	The SIP is an important tool setting out the investment framework that is needed to deliver the ambitions of the TfSE Transport Strategy. This Plan will be a key document when lobbying Central Government for future funding. The risk of not endorsing the SIP would be the lack of a coherent and joined up transport strategy and investment plan at a sub-national level. This could impact on our ability to secure future funding for transport schemes outlined in the SIP, particularly strategic schemes that benefit a wider area. Not endorsing the SIP, could also result in reputational risk to Council as a member of TfSE that has helped shape the development of the SIP.
POLICY FRAMEWORK IMPLICATIONS	
18.	The TfSE Transport Strategy and Strategic Investment Plan (SIP) for the South-East do not form part of the SCC Policy Framework.
19.	Local Transport Authorities have a duty to prepare and publish Local Transport Plans as required by the Transport Act 2000, and as amended by the Local Transport Act 2008 (Part 2). Southampton’s Local Transport Plan (also known as the Connected Southampton Transport Strategy) will continue to set out the transport strategy for the city up to 2040 and the short-term delivery plan (the Implementation Plan) up to 2025.
20.	The SIP complements our Local Transport Plan by setting out strategic transport priorities across the South East, and around Southampton, for the period up to 2050, which will need to be developed and delivered in partnership with a range of stakeholders, including SCC and other TfSE member Local Transport Authorities, and national infrastructure providers, such as national Highways and Network Rail. The priorities detailed in the SIP are aligned to national strategies, including Bus Back Better, Transport Decarbonisation Plan and Great British Railways, and aspirations set out in the Local Transport Plans covering the South-East.

KEY DECISION?	Yes
WARDS/COMMUNITIES AFFECTED:	All Wards
SUPPORTING DOCUMENTATION	
Appendices	
1.	Transport for the South East - Strategic Investment Plan
2.	Proposed Strategic Investment Plan Interventions in Southampton
3.	Equality and Safety Impact Assessment

Documents In Members’ Rooms

<table>
<tr><td>1.</td><td colspan="2">Transport for the South East - Strategic Investment Plan</td></tr>
<tr><td colspan="3">Equality Impact Assessment</td></tr>
<tr><td colspan="2">Do the implications/subject of the report require an Equality and Safety Impact Assessment (ESIA) to be carried out.</td><td>Yes</td></tr>
<tr><td colspan="3">Data Protection Impact Assessment</td></tr>
<tr><td colspan="2">Do the implications/subject of the report require a Data Protection Impact Assessment (DPIA) to be carried out.</td><td>No</td></tr>
<tr><td colspan="3">Other Background Documents
Other Background documents available for inspection at:</td></tr>
<tr><td colspan="2">Title of Background Paper(s)</td><td>Relevant Paragraph of the Access to Information Procedure Rules / Schedule 12A allowing document to be Exempt/Confidential (if applicable)</td></tr>
<tr><td>1.</td><td colspan="2">Transport for the South-East Strategic Investment Plan – Draft Consultation Response, October 2022: Report for Cabinet 18 October 2022</td></tr>
<tr><td>2.</td><td colspan="2">Transport for the South East – Shadow Partnership Board papers from 14 November meeting, including summary of Strategic Investment Plan consultation responses: 20221114 - PB Agenda (transportforthesoutheast.org.</td></tr>
</table>

Report (Plain Text)
November 2022

A Strategic Investment Plan for the South East

Transport for the South East
Our ref: 24137701

Report (Plain Text)
November 2022

A Strategic Investment Plan for the South East

Prepared by:

Steer
14-21 Rushworth Street
London SE1 0RB

+44 20 7910 5000
www.steergroup.com

Prepared for:

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

Our ref: 24137701

Contents

Foreword

I am delighted to introduce our Strategic Investment Plan (SIP). The culmination of five years of technical work, stakeholder engagement and institutional development.

Underpinned by a credible, evidence based technical programme our SIP presents a compelling case for future-decision making which will help us create a more productive, healthier, happier and more sustainable South East.

This plan sets out our thirty-year vision for the region – it aligns with and supports government priorities to rapidly decarbonise the transport system, improve public health outcomes, reduce congestion and improve road safety, level-up left-behind communities and facilitate sustainable economic growth in the South East.

It has been developed in partnership and written for and on the behalf of the South East's residents, communities, businesses and political representatives.

From 20 June to 12 September 2022, we consulted on the draft of this plan inviting everyone that it affects to read the draft and respond.

We received a lot of support for the SIP as making the best case possible for investing in transport infrastructure in the south east. We also received a number of comments around key themes such as decarbonisation, public transport and active travel and we acknowledge there is potential for us to go further in addressing these key issues with our partner organisations. We commit to exploring this through the development of the SIP delivery action plan and the development of policy statements on active travel, rural mobility and decarbonisation. We have listened, and reviewed all of the feedback received, and amended the plan accordingly.

We are immensely proud of the TfSE partnership and of the work that has gone into developing this bold and ambitious plan. We believe it truly puts the South East and its communities at the centre, connecting people and business, improving access to education, healthcare, jobs and our green spaces. It will support the South East's economy to more than double over the next thirty years. It provides the potential for new jobs, new homes and new opportunities – all supported by a modern, integrated transport network. Creating a prosperous, confident South East where people want to live, work, study, visit and do business.

We are clear that implementing this plan and achieving the vision set out in our Transport Strategy won't happen overnight and that it cannot be growth at any cost. The first step on this journey is simple; we must make better use of what we have. The packages of interventions outlined in this plan do just this. It isn't about building new roads or railways. It is about making better use of existing assets and corridors and about making sure new and emerging technology is used to its full potential, to boost physical and digital connectivity. It is about more joined up planning, particularly between transport and housing, to help build more sustainable communities and enable more efficient business operations. It's about putting the strategic transport infrastructure in place that enables communities to thrive and live happier, healthier, more active lives.

Not only does this plan set out the interventions we believe are needed over the next thirty years, but it also explores opportunities for funding that will allow us to realise these ambitions and ensure the reliance isn't solely on government funding. This of course will continue to be explored beyond publication of this plan and it is our expectation that the funding sought to deliver this plan is above and beyond the funding (both revenue and capital) required to steady our networks and address the substantial challenge of maintaining and bolstering local transport services and maintaining our highways and related assets. In short, local transport authorities must be adequately funded to maintain their existing assets alongside our plan to deliver transformational packages of interventions.

We are publishing this plan during a time of unprecedented change. The Covid-19 pandemic has changed the way that people travel, public services are under great financial strain, including public transport services, and we face a cost of living crisis that will impact on the lives of many of our residents and communities. As we adapt to a new normal in response to these challenges new data will become available to support the evidence base underpinning the case for change and investment in the TfSE area. We remain certain that our Transport Strategy and SIP offer the right approach to achieve our 2050 vision. They are live documents and will be reviewed periodically.

Next, we will present this plan to government on behalf of our partners and our communities across the region, in support of our shared ambitions and as advice to the secretary of state. In doing so we ask the secretary of state to have regard to this plan as priorities are set, policies are developed, and investment decisions are made in additional to existing funding in order to deliver the schemes within this plan and realise their benefits.

Implementing this plan will be challenging at times but we owe it to the generation coming behind us to put in place a transport system that leaves no one behind and provides the framework for a prosperous South East.

I firmly believe that together, we can achieve the aims of this ambitious plan.

Keith Glazier, Chair of Transport for the South East

Executive Summary

Transport for the South East (TfSE) is the Sub-national Transport Body for the South East of England. We work across boundaries, think long term and advocate for bold action in the interest of our communities.

TfSE holds a pivotal role in ensuring the infrastructure needs of the South East are well understood, that investment opportunities in the region have a robust evidence base, and that there is close alignment between local and national government in both the development of relevant policy and delivery of projects.

Developed with stakeholders, our vision is that by 2050, the South East of England will be a leading global region for net-zero carbon, sustainable economic growth where integrated transport, digital and energy networks have delivered a step-change in connectivity and environmental quality. A high-quality, reliable, safe, and accessible transport network will offer seamless door-to-door journeys enabling our businesses to compete and trade more effectively in the global marketplace, improve public health outcomes, and give our residents and visitors the highest quality of life.

This Strategic Investment Plan (SIP) for South East England provides a framework for investment in strategic transport infrastructure, services, and regulatory interventions in the coming three decades.

The plan is supported by a large amount of detailed work informed by consultation over several years. It is aligned with and supports wider policy and government priorities at multiple levels and across multiple transport modes, most notably the need to rapidly decarbonise our transport networks in response to the climate emergency (which has even been formally declared by some TfSE councils). This includes increasingly close alignment between the TfSE Transport Strategy, this plan and with Local Transport Plans. Ensuring individual community needs are well understood and that projects at every scale complement each other, avoids waste and duplication of effort wherever possible.

The plan presents 24 regional *packages* of investment opportunities across the key modes or infrastructure networks of rail, mass transit (in this SIP mass transit Is defined as high quality buses or ferries providing an uplift in public transport provision on a corridor and benefitting from segregation or priority infrastructure where appropriate. The mass transit system supports multi-modal travel and seamless transfer between modes which includes rail and bus services), active travel (e.g. walking, wheeling, cycling, horse-riding) and highways. To avoid increasing congestion, improve road safety, increase access to affordable transport options, and further support decarbonisation, highways opportunities in the SIP have a particular focus on those facilitating freight and bus movements to make the best use of the roads in our region.

Within each package are a collection of well-considered *interventions* that seek to address the key *investment priorities* for the South East including:

- **Decarbonisation and environment**: accelerate decarbonisation of the South East, enabling the UK to achieve net zero carbon ("net zero") by 2050 at the latest, recognising that some areas have set an earlier target, notably some urban areas which have set a 2030 target, and the SIP can be complementary to those areas moving faster both in terms of Global Policy Interventions and packages of interventions. This priority also supports the delivery of a transport network with greater use of public transport, powered by decarbonised energy sources (e.g. electricity and green hydrogen), and active travel, as well as behaviour change measures and reduction in the need to travel. All schemes should have regard to Section 62 duty of the Environment Act (1995) and incorporate measures to deliver biodiversity net gain, and enhance the landscape, from the outset.
- **Adapting to a new normal:** enable the South East's economy and transport systems to adapt sustainably to changing travel patterns and new ways of working as we learn to live with Covid and changing trading relationships between the UK and the EU, and steadying our networks after a period of flux.

- **Levelling up left behind communities:** deliver a more affordable and accessible transport network for the South East that addresses deprivation, promotes social inclusion, improves public health and individual wellbeing, and reduces barriers to employment, learning, social, leisure, physical and cultural activity for all rural and urban communities.
- **Regeneration and growth**: attract investment to grow our economy, better compete in the global marketplace, unlock regeneration and growth opportunities and address housing shortages where this has been held back by inadequate infrastructure or poor integration between land use and transport planning – and plan to help reduce the need to travel by car and other motor vehicles.
- **World class urban transport systems:** deliver world class and seamlessly integrated, sustainable urban transport systems (rail, bus, tram, ferry, cycling, and walking) for the South East's largest conurbations, to enable residents of all ages and levels of ability, businesses, and visitors to travel easily, safely, and sustainably within and between built up areas.
- **Transforming east – west connectivity**: enhance our east – west corridors (also included amongst these corridors are London Orbital corridors which may be north-south corridors to the east and west of London) to same level as radial links to and from London to boost connectivity between our major economic hubs, international gateways (ports, airports, and rail terminals) and their markets.
- **Resilient radial corridors**: deliver an increasingly reliable a transport network that is smarter at managing transport demand, and more resilient to accidents as well as climate related incidents, such as disruption to energy supplies, extreme weather, and the impacts of a changing climate, to strengthen the South East's key role supporting the capital and connecting the UK to the rest of the world.
- **Global gateways and freight**: enhance the capacity and contribution of the freight and logistics sector to the South East's economy through improved connectivity to Global Gateways, including Freeports, and adapt to changing patterns of freight demand and trade, including making the most of innovations in sustainable first and last mile delivery.

In general, the vast majority of interventions will be delivered through existing frameworks and investment cycles, with a small number of particularly complex and/or large-scale projects possibly requiring bespoke procurement and delivery arrangements.

With a total capital cost of £45 billion over 27 years – about £1.5bn a year – delivery of the interventions in this plan could deliver by 2050:

- 21,000 additional new jobs
- An additional £4bn in GVA each year by 2050
- £1.4 mega tonnes less CO_2e emitted and the scope to reach net zero with national, local and private sector partners by 2050

Delivery of the interventions would see each weekday in 2050:

- 500,000 more rail trips
- 1.5 million more trips by bus, mass transit and ferry
- 4 million fewer car trips

Timing the delivery of each intervention will also need to be carefully considered to avoid unintended negative consequences and ensure the greatest possible value.

The following table and map provide an overview of the packages, how they align with the Investment priorities as well as their expected costs and benefits.

A full list of interventions within each package can be found in **Appendix A**

Investment Opportunities

Table 1: Packages and their Benefit and Capital Costs

Packages of Interventions*	Global Policy interventions (see main section for further detail)	Solent and Sussex Coast		A. South Hampshire Rail (Core)	B. South Hampshire Rail (Enhanced)	C. South Hampshire Mass Transit	E. South Hampshire Active Travel	D. Isle of Wight Connections	F. Sussex Coast Rail	G. Sussex Coast Mass Transit	H. Sussex Coast Active Travel	I. Solent and Sussex Coast Highways
Implementation Timeframe	Ongoing			Short – Medium	Medium – Long	Short – Medium	Short	Short – Medium	Short – Medium	Short – Medium	Short Term	Short – Long
Decarbonisation and Environment	✓			✓	✓	✓	✓	✓	✓	✓	✓	-
Adapting to a New Normal	✓			✓	✓	✓	✓	✓	✓	✓	✓	-
Levelling Up Left Behind Communities	✓			✓	✓	✓	✓	✓	✓	✓	✓	-
Regeneration and Growth	✓			✓	✓	✓	✓	✓	✓	✓	✓	✓
World Class Urban Transit Systems	✓			✓	✓	✓	✓	✓	✓	✓	✓	-
East – west connectivity	✓			✓	✓	✓	✓	-	✓	✓	✓	-
Resilient radial corridors	✓			✓	✓	-	✓	✓	✓	-	✓	✓
Global gateways and freight	✓			✓	✓	✓	-	✓	-	-	-	✓
Capital Construction Cost in £millions*	-	11,200		600	3,700	1,800	350	250	50	450	250	3,500
Gross Value Added (GVA) in £millions per annum in 2050	720	1,250		285	305	165	10	165	80	120	-	200
Additional new local residents by 2050 (Compared to Do Nothing Scenario in 2050)	-52,500	6,350		1,050	1,150	1,300	150	1,950	700	850	-	250
Additional full time-equivalent jobs by 2050 (Compared to Do Nothing Scenario in 2050)	-1,600	7,900		1,550	2,000	1,000	50	1,500	350	550	<50	700
Change in Carbon Emissions in 2050 (Nearest 5,000 Kilo-Tonnes CO_2e)	-1.4m	-10,000		-	-	-30,000	-10,000	-	-	-10,000	-5,000	45,000
Change in average weekday return trips	-1.4m	35,000		5,000	10,000	5,000	-	5,000	5,000	5,000	-	5,000

Figures rounded to nearest: £50m for Capital Cost; £5m for GVA; 50 new residents /jobs; 5,000 tonnes CO_2e; and 5,000 daily return trips

*A full list of proposed interventions within each package can be found in Appendix A

**Assumes High Speed Rail option goes via Chatham rather than Medway City Estate or Rochester

***Assumes assignment of 40% of Lower Thames Crossing capital to Kent geographically

Packages of Interventions*	J. London – Sussex Coast	K. London – Sussex Coast Rail	L. London – Sussex Coast Mass Transit	M. London – Sussex Coast Active Travel	N. London – Sussex Coast Highways	Wessex Thames	O. Wessex Thames Rail	P. Wessex Thames Mass Transit	Q. Wessex Thames Active Travel	R. Wessex Thames Highways
Implementation Timeframe		Short – Medium	Short – Medium	Short	Medium – Long		Short – Long	Short – Medium	Short	
Decarbonisation and Environment		✓	✓	✓	-		✓	✓	✓	-
Adapting to a New Normal		-	✓	✓	-		✓	✓	✓	-
Levelling Up Left Behind Communities		-	-	✓	-		-	✓	✓	-
Regeneration and Growth		✓	✓	✓	✓		✓	✓	✓	✓
World Class Urban Transit Systems		-	✓	✓	-		-	✓	✓	-
East – west connectivity		-	✓	✓	-		-	✓	✓	✓
Resilient radial corridors		✓	✓	✓	✓		✓	✓	✓	✓
Global gateways and freight		✓	✓	-	✓		✓	-	-	✓
Capital Construction Cost in £millions*	3,600	500	400	1,100	1,600	10,400	7,200	1,000	400	1,800
Gross Value Added (GVA) in £millions per annum in 2050	615	400	100	10	100	1,205	850	245	35	90
Additional new local residents by 2050 (Compared to Do Nothing Scenario in 2050)	8,100	6,250	1,340	50	700	7,100	3,100	3,300	500	200
Additional full time-equivalent jobs by 2050 (Compared to Do Nothing Scenario in 2050)	4,550	2,350	800	<50	1,350	5,600	3,750	1,300	<50	450
Change in Carbon Emissions in 2050 (Nearest 5,000 Tonnes CO_2e)	-10,000	-10,000	-15,000	-10,000	20,000	-60,000	-5,000	-55,000	-30,000	25,000
Change in average weekday return trips	4,150	30,000	5,000	-	-	50,000	35,000	10,000	-	5,000

Figures rounded to nearest: £50m for Capital Cost; £5m for GVA; 50 new residents /jobs; 5,000 tonnes CO_2e; and 5,000 daily return trips

*A full list of proposed interventions within each package can be found in Appendix A

**Assumes High Speed Rail option goes via Chatham rather than Medway City Estate or Rochester

***Assumes assignment of 40% of Lower Thames Crossing capital to Kent geographically

Packages of Interventions*	Kent, Medway, and East Sussex (KMES)	S. KMES Rail	U. KMES High Speed Rail East	U. KMES High Speed Rail North	V. KMES Mass Transit	W. KMES Active Travel	Y. Lower Thames Crossing	X. KMES Highways
Implementation Timeframe		Short – medium	Short – Medium	Medium - Long	Short- Medium	Short	Medium – Long	Medium – Long
Decarbonisation and Environment		✓	✓	✓	✓	✓	-	-
Adapting to a New Normal		✓	✓	✓	✓	✓	✓	✓
Levelling Up Left Behind Communities		✓	✓	✓	✓	✓	✓	✓
Regeneration and Growth		✓	✓	✓	✓	✓	✓	✓
World Class Urban Transit Systems		✓	-	-	✓	✓	-	-
East – west connectivity		✓	✓	✓	-	✓	-	-
Resilient radial corridors		✓	✓	✓	✓	✓	✓	✓
Global gateways and freight		✓	✓	✓	✓	-	✓	✓
Capital Construction Cost in £millions*	19,400	3,700	1,000	7,300***	700	100	2,800***	3,800
Gross Value Added (GVA) in £millions per annum in 2050	745	140	125	225	45	15	105	90
Additional new local residents by 2050 (Compared to Do Nothing Scenario in 2050)	28,400	6,150	5,800	11,700	1,550	450	1,600	1,200
Additional full time-equivalent jobs by 2050 (Compared to Do Nothing Scenario in 2050)	8,400	1,500	1,400	2,450	400	250	1,400	950
Change in Carbon Emissions in 2050 (Nearest 5,000 Tonnes CO_2e)	30,000	-15,000	-15,000	-15,000	-25,000	-10,000	45,000	65,000
Change in average weekday return trips	155,000	20,000	15,000	35,000	-	-	75,000	5,000

Figures rounded to nearest: £50m for Capital Cost; £5m for GVA; 50 new residents /jobs; 5,000 kilo-tonnes CO_2e; and 5,000 daily return trips

*A full list of proposed interventions within each package can be found in Appendix A

**Assumes High Speed Rail option goes via Chatham rather than Medway City Estate or Rochester

***Assumes assignment of 40% of Lower Thames Crossing capital to Kent geographically

Figure 1: South East packages of interventions

[Map of TfSE region using coloured lines to indicate types of rail, highway, mass transit and active travel interventions. Shaded areas indicate protected areas such as South Downs National Park as well as active travel and mass transit corridors]

Page 95

Introduction

Transport for the South East

Transport for the South East (TfSE) is the Sub-national Transport Body for the South East of England.

TfSE works across boundaries, thinks long term, and advocates for bold action in the interest of its communities.

We were established in 2017 to determine what transport infrastructure is needed to boost the region's economy.

Our role is to add strategic value to local and national decision making and project delivery by making sure funding and strategy decisions about transport in the South East are informed by local knowledge and priorities.

As a partnership, we also ensure there is close alignment – a 'golden thread' – between local and national government in both the development of relevant policy and delivery of projects. For example, between local transport plans and national rail investment strategies.

Transport Strategy Vision

In our 2020 Transport Strategy we outline our vision for the South East as:

By 2050, the South East of England will be a leading global region for net-zero carbon, sustainable economic growth where integrated transport, digital and energy networks have delivered a step-change in connectivity and environmental quality. A high-quality, reliable, safe, and accessible transport network will offer seamless door-to-door journeys enabling our businesses to compete and trade more effectively in the global marketplace and giving our residents and visitors the highest quality of life.

The vision is underpinned by **three strategic goals**:

- **Economic**: Improve productivity and attract investment to grow our economy and better compete in the global marketplace;
- **Social**: Improve health, safety, wellbeing, quality of life, and access to opportunities for everyone; and
- **Environmental**: Protect and enhance the South East's unique natural and historic environment.

The Strategic Investment Plan

We are delighted to introduce our **Strategic Investment Plan (SIP) for South East England**, which provides a framework for investment in strategic transport infrastructure, services, and regulatory interventions in the coming three decades.

This plan provides a framework for delivering our Transport Strategy, which:

- is a blueprint for investment in the South East;
- shows how we will achieve our ambitions for the South East;
- is owned and delivered in partnership;
- as set out in the legislation to establish sub-national transport bodies, this document is intended to provide advice to the Secretary of State for Transport;
- is a regional plan with evidenced support, to which partners can link their own local strategies and plans – a golden thread that connects policy at all levels;
- provides a sequenced plan of multi-modal investment packages that are place based and outcome focused; and
- examines carbon emissions impacts as well as funding and financing options.

This plan presents a compelling case for action for investors, including government departments – notably the Treasury and Department for Transport (DfT) – as well as private sector investors. It is written for and on behalf of the South East's residents, communities, businesses and political representatives.

The SIP also does **not**:

- detail or prioritise a list of specific scheme options;
- duplicate or detract from the established roles of our Local Transport Authorities and other partners;
- focus on local transport schemes without wider strategic impact; nor
- ask Treasury to fund the entire infrastructure requirement for the South East.

As we adapt to a new normal in response to the Covid-19 pandemic new data will become available to support the evidence base underpinning the case for change and investment in the TfSE area. The Transport Strategy and SIP, as such, are live documents and will be reviewed periodically.

How the plan was developed

This plan represents the culmination of five years of technical work, stakeholder engagement, and institutional development.

It is underpinned by a credible, evidence-based technical programme that has enabled TfSE and our partners to:

- understand the current and future challenges and opportunities in the South East;
- identify stakeholder priorities for their respective areas of interest;
- evaluate the impacts of a wide range of plausible scenarios on the South East’s economy, society, and environment;
- develop multi-modal, cross-boundary interventions;
- assess the impact of proposed interventions on transport and socio-economic outcomes; and

- prioritise the interventions that best address the South East’s most pressing challenges and unlock the South East’s most promising opportunities.

A list of the documents that constitute the robust **Evidence Base** that has informed the development of this plan is provided in **Appendix B**

Local and national policy context

This plan is aligned with and supports wider policy and government priorities at multiple levels and across multiple transport modes, including but not limited to:

National - Transport

- Decarbonising transport: a better, greener Britain (2021)
- Great British Railways: The Williams-Shapps plan for rail (2021)
- Bus Back Better: national bus strategy for England (2021)
- Gear Change: Cycling and walking plan for England (2020)
- Transport Investment Strategy (2017)
- Government Road Investment Strategies and the Rail Network Enhancements Pipelines

National – Wider Policy

- Levelling Up the United Kingdom White Paper (2022)
- Net Zero Strategy: Build Back Greener (2021)
- National planning Policy Framework (2021)
- Clean Air Strategy (2019)
- A Green Future (2018)
- planning frameworks for Nationally Significant infrastructure Projects

Regional

- **TfSE Transport Strategy** (2020)
- Local Enterprise Partnership priorities for their areas
- National Park Authority planning policies

Local

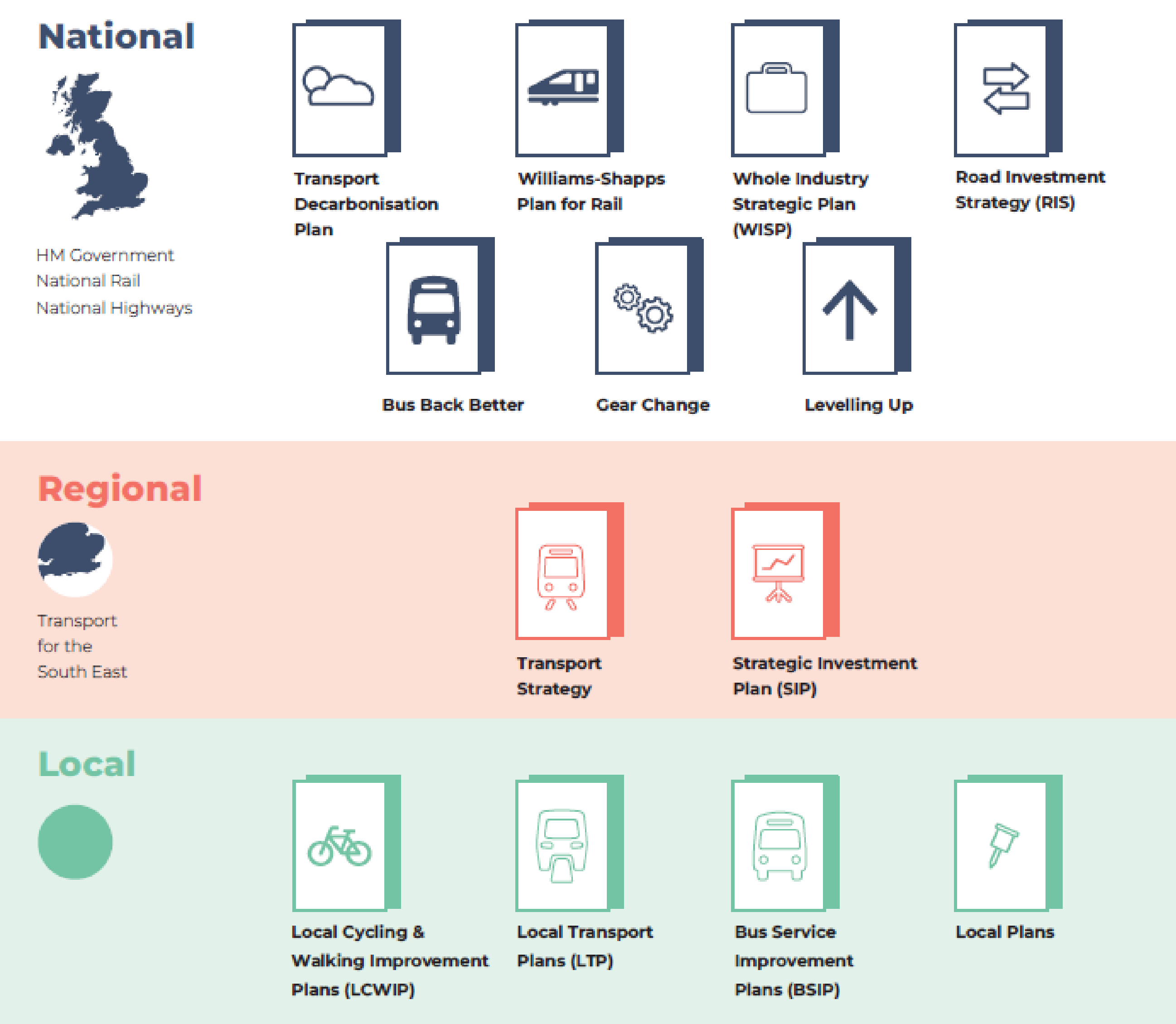
- Local Transport Plans
- Bus Service Improvement Plans
- Local Cycling & Walking Infrastructure Plans
- Local Plans

This SIP sits at the regional planning level, bridging the gap between national and local government.

An illustration of the position of this document within the wider policy landscape is provided in **Figure 2**.

This approach includes increasingly close alignment between the TfSE Transport Strategy and this plan with local transport plans to ensure individual community needs are well understood and that projects at every scale complement each other, avoiding waste and duplication of effort wherever possible.

Figure 2: Wider policy context



[A three row graphic image divided between National, Regional and Local levels. National includes reference to HM Government, National Rail and National Highways and notes the policies of the Transport Decarbonisation Plan, Williams-Shapps Plan for Rail, Whole Industry Strategic Plan (WISP), Road Investment Strategy (RIS), Bus Back Better, Gear Change, and Levelling Up. Regional includes reference to Transport for the south East and notes the policies of the Transport Strategy and Strategic Investment Plan (SIP). Local notes the policies of Local Cycling & Walking Improvement Plans (LCWIP), Local Transport Plans (LTP), Bus Service Improvement Plans (BSIP) and Local Plans.]

Investment priorities

The packages detailed in this plan address **eight investment priorities** aligned with the vision and strategic goals of the TfSE Transport Strategy and the wider regional and national policy context with which both are aligned.

Decarbonisation and environment

- **Decarbonisation and environment**: accelerate decarbonisation of the South East, enabling the UK to achieve net zero carbon ("net zero") by 2050 at the latest, recognising that some areas have set an earlier target, notably some urban areas which have set a 2030 target, and the SIP can be complementary to those areas moving faster both in terms of Global Policy Interventions and packages of interventions. This priority also supports the delivery of a transport network with greater use of public transport, powered by decarbonised energy sources (e.g. electricity and green hydrogen), and active travel, as well as behaviour change measures and reduction in the need to travel. All schemes should have regard to Section 62 duty of the Environment Act (1995) and incorporate measures to deliver biodiversity net gain, and enhance the landscape, from the outset.

Adapting to a new normal

Enable the South East's economy and transport systems to adapt sustainably to changing travel patterns and new ways of working as we learn to live with Covid and changing trading relationships between the UK and the EU, and steadying our networks after a period of flux.

Levelling up left behind communities

Deliver a more affordable and accessible transport network for the South East that addresses deprivation, promotes social inclusion, improves public health and individual wellbeing, and reduces barriers to employment, learning, social, leisure, physical and cultural activity for all rural and urban communities.

Regeneration and growth

Attract investment to grow our economy, better compete in the global marketplace, unlock regeneration and growth opportunities and address housing shortages where this has been held back by inadequate infrastructure or poor integration between land use and transport planning.

World class urban transport systems

Deliver world class and seamlessly integrated, sustainable urban transport systems (rail, bus, tram, ferry, cycling, and walking) for the South East's largest conurbations, to enable residents of all ages and levels of ability, businesses, and visitors to travel easily, safely, and sustainably within and between built up areas. The TfSE Rail, Strategic Active Travel and Micro-mobility and the Bus, Shared Mobility and Mass Transit plans provide more detail as to the rationale and priority areas for intervention across these modes, including how TfSE supports the delivery of Bus Service Improvement Plans and Enhanced Partnerships.

Transforming east – west connectivity

Enhance our east – west corridors (also included amongst these corridors are London Orbital corridors which may be north-south corridors to the east and west of London) to same level as radial links to and from London to boost connectivity between our major economic hubs, international gateways (ports, airports, and rail terminals) and their markets.

Resilient radial corridors

Deliver an increasingly reliable a transport network that is smarter at managing transport demand, and more resilient to accidents as well as climate related incidents, such as disruption to energy supplies, extreme weather, and the impacts of a changing climate, to strengthen the South East’s key role supporting the capital and connecting the UK to the rest of the world.

Global gateways and freight

Enhance the capacity and contribution of the freight and logistics sector to the South East’s economy through improved connectivity to Global Gateways, including Freeports, and adapt to changing patterns of freight demand and trade, including making the most of innovations in sustainable first and last mile delivery.

Benefits of investing in the South East

In combination with other strategies and activities, improving the region's transport networks through the investment opportunities set out in this plan will help enable the UK to:

- Reach net-zero by 2050 at the latest and support the development of low-carbon industries;
- Level up left behind communities – particularly in urban and coastal areas;
- Deliver affordable housing for the South East's current and future residents;
- Build thriving new communities inclusive of people of all ages and levels of ability and regenerate town and city centres and key sites;
- Boost the productivity of the area through delivering more reliable, resilient, better connected transport networks;
- Encourage behaviour change to more sustainable modes and patterns of activity and travel; and
- Increase the volume and value of trade with the rest of the world.

Comparing the high-level benefits and costs of the packages of interventions shows how they will help us achieve our strategic vision and objectives for the South East and support wider government policy.

The Size of the Prize

TfSE's Economic Connectivity Review identified opportunities to significantly grow the economy in the South East. With the right investment and policies, this study found there is potential to more than double the South East's GVA to £500 billion a year by 2050.

Our own modelling suggests the transport interventions included in this plan alone will enable 21,000 new jobs; an additional £4.5 billion growth in GVA a year by 2050; 1.4 mega tonnes less CO_2e; and additional 550,000 rail trips a day and 1.6 million bus, mass transit and ferry trips a day, and take over four million car trips a day off the roads of the South East.

This growth will not come from transport alone, but transport will be an important part of the jigsaw and an enabler of growth in other sectors.

Realising this opportunity will require an integrated approach to investment and delivery. It will require working across institutional, sectoral, and spatial boundaries.

There are several drivers of growth that transport investment supports:

- **Connecting businesses** with faster and more reliable travel times. This plan enables the South East's towns and cities to boost their productivity by better integrating and sharing their economic assets, wider sharing of resources and knowledge, and will provide businesses with easier access to a large, diverse, highly educated work force.
- **Expanding the workforce** by easier matching of jobs to people. This plan will enable firms to access and recruit a larger labour supply, and provide wider employment opportunities for workers and those seeking to work.
- **Enabling development** through unlocking sites and locations that were previously poorly connected. This plan will provide the sustainable transport capacity and connectivity for net zero growth and development.

- **Accessing global gateways** to increase domestic and international trade by reducing trading costs. This plan facilitates trade in the South East and – at a much larger scale – between the UK and Mainland Europe. This will enable the UK to prosper as it adapts to a new trading relationship with the European Union and recovers from the global Covid pandemic.
- **Directing investment to level-up left behind communities.** This plan makes the South East an even more attractive place to invest. It will bring areas up that are left behind relative to some other areas of the UK due to structural disadvantages (i.e., poor connectivity to the rest of the UK) or places that are held back by transport network constraints (e.g., where development opportunities are stalled due to traffic constraints or local access to key services aren't there by public transport).

Investing in the South East will yield material economic, social, and environmental returns for our residents, businesses, and visitors, improved public health outcomes and supporting the UK economy and enabling Government to achieve its wider carbon, trade, and levelling-up objectives.

This plan does not just focus on new-build infrastructure. Packages include measures that make better use of existing assets and corridors, and support more efficient business and operating models. For example, there are proposals to enhance cross-regional rail and freight services using the existing rail network without having any detrimental impact on passenger services by utilising capacity released from a decline in five-day commuting.

There will be opportunities for revenue generation and the private sector to invest. While support from government will be sought for some packages, this plan utilises all sources of funding to realise TfSE's ambitions for the South East. This includes opportunities to use transport to generate more revenue as well as alternative funding streams to those that currently rely on duties on fossil fuels.

Doing nothing is not an option

We believe a range of multi- modal and wider policy interventions are needed to realise our vision.

Using Department for Transport data to model future transport and socioeconomic outcomes for the South East shows that if the South East continues on a "Business as Usual" trajectory, by 2050:

- the number of car trips will grow 23%;
- the number of rail trips will (only) grow 31%;
- the number of bus trips will (only) grow 26%;
- the number of active travel trips will decline 10%;
- carbon emissions will (only) decline by 35%; and
- structural inequalities and areas of deprivation will persist and restrict economic growth.

Furthermore, if we do not act then many of the investment priorities will not be addressed, and associated opportunities will not be realised. More specifically, there is a material risk that:

- the South East will not decarbonise its transport system fast enough;
- the South East's transport systems will not adapt to a post-pandemic, post-Brexit environment;
- housing growth will stall and house prices will remain unaffordable for too many of the South East's residents (and potential residents);

- the South East’s left behind and more deprived communities will be unable to “catch up”; and
- improved public health outcomes will not be achieved, with disproportionate negative impact on the most vulnerable.

Packages of interventions

TfSE has worked with partners, stakeholders and technical advisors to develop 24 coherent packages of complementary, multi-modal interventions that aim to deliver on our vision and objectives for the South East.

These packages have been developed through workshops, discussions, and careful analysis of results of the assessment of the long list of interventions described earlier. In essence, these provide a 'golden thread' between top-down, vision-led goals and a bottom-up assessment of individual interventions.

This combination of strategic investments will allow TfSE to achieve its objectives and, in doing so, support wider local, regional and national policy and priorities. This includes addressing local issues while also strengthening the South East's key role in supporting the capital and connecting the UK to the rest of the world.

A full list of proposed interventions within each package can be found in **Appendix A**

Packages are multi-modal – presenting a transformational opportunity to enhance travel for people of all ages and levels of ability, including the significant increase in people aged over 65.

Whilst most interventions focus on sustainable modes in rural and urban areas, targeted interventions to deliver a high-quality east – west connections and more resilient radial highways corridors have been identified. All highways interventions are multi-modal as well accommodating zero emission vehicles. The Highways Thematic Plan provides further information on the context in which highways intervention is justified.

The packages broadly split into two groups:

- **1 global package of interventions** consisting of national regulatory and policy activity and local action.
- **24 place-based packages of interventions** presented at a sub-regional level, with many being multi-modal or mode-agnostic.

Investing in these effective, deliverable, and good value for money transport interventions in the South East will have a material and positive impact across the wider South East and UK.

Highways packages are, in themselves, multi-modal, make best use of existing infrastructure and comply with the highest standards and guidelines, including the requirements for biodiversity net gain and LTN 1/20 for the provision of high-quality, segregated active travel infrastructure. Where identified they support:

- safer roads, notably in urban areas;
- improved access to international gateways, for passengers and freight, and supporting domestic, road reliant sectors, allowing for more efficient trade;
- de-conflicting of private and mass transit vehicle flows between local and longer-distance routes, with the greatest benefit when freed up road space is reallocated and supported by public transport and active travel improvements (including those being delivered by councils at a local level);
- improved environments, public transport and active travel facilities for existing residents;
- unlocking of housing/regeneration/growth area; and
- placemaking (e.g., investing in public spaces) making them more inclusive of people of all ages and levels of ability.

These packages are a step-change away from traditional “predict and provide” capacity enhancements of previous decades. They support our vision and support not only strategic movement of vehicles but our places and communities.

They have been refined to minimise increases in carbon emissions and the impact of these interventions on the wider environment, but all highways packages do result in small increases based on the existing vehicle fleet. While emissions will improve with time as more vehicles are electric or hydrogen, the need to manage congestion and facilitate freight and bus movements will remain a particular focus within the SIP.

Further mitigation will be needed as these packages and interventions are developed. They will also be complimented by a number of global package interventions, which will, promote demand management and digital technology to reduce the number of trips, accelerate the decarbonisation of road vehicles, and promote sustainable travel.

1. Global package interventions

The Global Policy interventions are designed to address the challenges and opportunities that affect the whole of the South East and the wider UK. These include existential challenges such as global warming and opportunities such as new mobility technologies providing an increasing variety of ways to travel and access transport opportunities beyond traditional hire or ownership.

The key Global Policy interventions that would help deliver the investment priorities of the South East are:

1.1. **Decarbonisation:** We aspire to deliver a faster trajectory towards net-zero than current trends, including rapid adoption of zero emission technologies, to avoid the worst effects of human-induced climate change. This includes working with partners at all scales of government and the private sector through the regional transport decarbonisation forum to decarbonising energy production to infrastructure for electric vehicles and green hydrogen refuelling.

1.2. **Public Transport Fares:** We wish to reverse the increase in real terms of the cost of public transport compared to motoring and increase ticket integration to reduce barriers to use.

1.3. **New Mobility:** We see great potential for new mobility technologies (e.g., electric bikes and scooters) and access opportunities (e.g., subscription models, car clubs and Mobility as a Service (MaaS)) to support decarbonisation of travel in the South East.

1.4. **Road User Charging:** We encourage the UK government to develop a national road user charging system to provide an alternative source of funding to fuel duty and to help manage demand in parallel to integrated local measures. Local authorities also have the opportunity to investigate workplace parking levies and Low Emission Zones in their areas where appropriate.

1.5. **Virtual Access:** The past two decades, amplified by the global Covid pandemic have shown how virtual working can help reduce demand for transport services.

1.6. **Integration:** We wish to see improvements in integration across and between all modes of transport in terms of infrastructure, services, ticketing, and accessibility, supporting seamless journeys and improved first and last mile connectivity.

In particular, these interventions deliver **very significant reductions in carbon emissions**. This is achieved through reducing overall demand (virtual working), managing demand (road pricing), and making lower-carbon transport options more attractive (new mobility options and public transport fares that are more integrated and seen as better value for money).

We believe most of these policies can be carefully designed to ensure there is – eventually, at least – no net change in cost to government based on:

- Assumption that new mobility technologies and ways to access them will be delivered primarily through private investment, supported by the active travel packages described in this plan as well as those walking and cycling schemes being delivered by councils at a local level.
- Virtual living is funded almost entirely through businesses providing appropriate technology to their employees and individuals ordering more goods online.
- Future road pricing policy will be designed to leave the transport systems user (as a whole) no worse off (e.g., road charges used to reduce public transport fares).
- Expectation that public transport will become more cost efficient (on a passenger kilometre basis) with increased patronage achieved through existing planned investment and the interventions detailed in this plan.
- Assumption that the interventions will be applied across the UK, ensuring a level playing field to avoid possible detrimental impacts on our residents and businesses (e.g., if Road User Charging were only applied in the South East).

2. Solent and Sussex Coast

The Solent and Sussex Coast area includes the two largest conurbations in the South East – South Hampshire (Southampton, Portsmouth, and surrounding built up areas) and what TfSE terms the “Sussex Coast Conurbation” (Littlehampton – Worthing – Brighton). It spans from the New Forest in the west to Hastings in the east. It also includes the Isle of Wight.

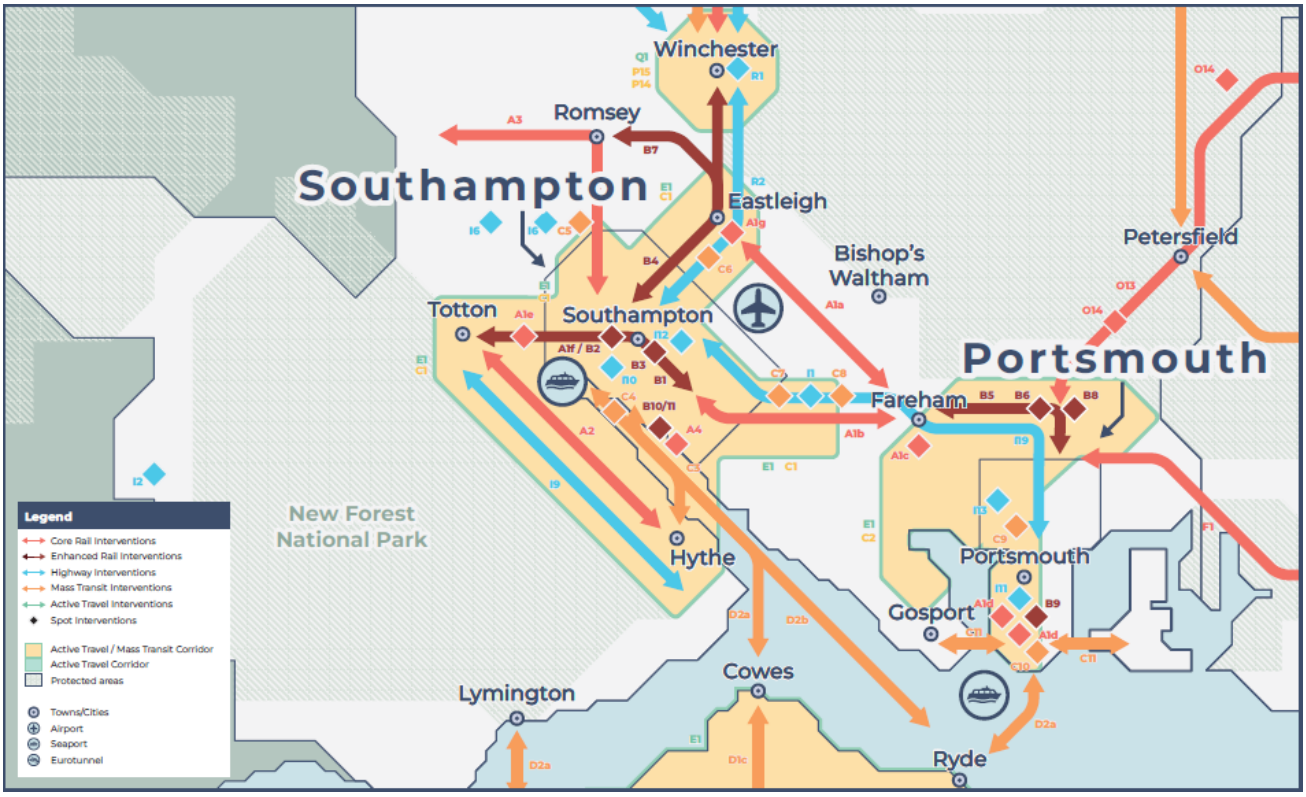
TfSE has developed nine packages of interventions for this area with a total expected capital investment of £11.8 billion and £1.3 billion in additional economic value each year by 2050.

The Solent rail packages significantly boost the number of rail trips in the Solent and Sussex Coast area (by 12% altogether) and deliver a significant uplift in GVA (£600m a year by 2050).

Packages of intervention are displayed in **Figure 3** for South Hampshire, **Figure 4** for Isle of Wight, and **Figure 5** for the Sussex Coast.

Figure 3: South Hampshire packages of interventions

[Map of South Hampshire region including Portsmouth and Southampton using coloured lines to indicate types of rail, highways, mass transit and strategic active travel interventions. Shaded areas indicate protected areas as well as active travel and mass transit corridors]



Core Rail Package

- **A1** Solent Connectivity Strategic Study
- **A2** Botley Line Double Tracking
- **A3** Netley Line Signalling and Rail Service Enhancements
- **A4** Fareham Loop / Platform

- **A5** Portsmouth Station Platforms
- **A6** South West Main Line - Totton Level Crossing Removal
- **A7** Southampton Central Station Upgrade and Timetabling
- **A8** Eastleigh Station Platform and Approach Flyover Enhancement
- **A9** Waterside Branch Line Reopening
- **A10** West of England Service Enhancements
- **A11** Additional Rail Freight Paths to Southampton

Enhanced Rail Package

- **B1** Southampton Central Station - Woolston Crossing
- **B2** New Southampton Central Station
- **B3** New City Centre Station
- **B4** South West Main Line - Mount Pleasant Level Crossing Removal
- **B5** West Coastway Line - Fareham to Cosham Capacity Enhancements
- **B6** West Coastway Line - Cosham Station Relocation
- **B7** Eastleigh to Romsey Line - Electrification
- **B8** Havant Rail Freight Hub
- **B9** Fratton Rail Freight Hub
- **B10** Southampton Container Port Rail Freight Access and Loading Upgrades
- **B11** Southampton Automotive Port Rail Freight Access and Loading Upgrades

Mass Transit

- **C1** Southampton Mass Transit
- **C2** South East Hampshire Rapid Transit
- **C3** New Southampton to Fawley Waterside Ferry Service
- **C4** Southampton Cruise Terminal Access for Mass Transit
- **C5** M271 Junction 1 Strategic Mobility Hub
- **C6** M27 Junction 5 / Southampton Airport Strategic Mobility Hub
- **C7** M27 Junction 7/8 Strategic Mobility Hub
- **C8** M27 Junction 9 Strategic Mobility Hub
- **C9** M275 Junction 1 Strategic Mobility Hub
- **C10** Clarence Pier Bus-Hovercraft Interchange
- **C11** Improved Gosport - Portsmouth and Portsmouth - Hayling Island Ferries

Active Travel

- **E1** Solent Active Travel (including LCWIPs)

Highways

- **I1** M27 Junction 8 (RIS2)
- **I2** A31 Ringwood (RIS2)
- **I6** Southampton Access (M27 Junction 2 and Junction 3) (RIS3 Pipeline)
- **I9** A326 Capacity Enhancements (LLM)
- **I10** West Quay Realignment (LLM)
- **I11** Portsmouth City Centre Road (LLM)
- **I12** Northam Rail Bridge Replacement and Enhancement (MRN)
- **I13** New Horsea Bridge and Tipner Bridge
- **I19** M27/M271/M275 Smart Motorway(s)

2.1. South Hampshire Rail (Core)

Network Rail, Solent Transport, and the Solent Authorities have developed a comprehensive package of interventions that will deliver improvements to urban and inter-urban rail journeys that form part of the Solent Connectivity Strategic Study, formerly Continuous Modular Strategic Plan (CMSP), including:

- Increasing capacity on the Botley line to twin tracks.
- Adding platform capacity at Portsmouth Harbour.
- Improving signalling on the Netley Line.
- Timetable changes to maximise capacity at Southampton Central; and possible additional platform capability Sidings at Totton and a solution to a level crossing constraint in this area.

This package is complemented with an intervention to enable passenger rail services to be introduced to the Fawley Branch Line and serve a large, planned development in this area, with other key benefits including:

- Capacity enhancements across the whole Solent conurbation.
- Improvements in service frequencies.
- Better interchange and service quality at Southampton Central Station.
- More communities will have access to the national rail network.

Key benefits include, by 2050:

- 35,000 additional rail trips a day
- 1,000 additional residents and 1,500 new jobs created

2.2. South Hampshire Rail (Enhanced)

Solent Transport and Local Transport Authorities have previously stated an ambition to deliver a level of service on urban metro routes comparable to suburban London of a “turn-up-and-go” service provided by at least four trains per hour.

There are also aspirations to increase capacity for freight movements and provide better connectivity between South Hampshire, the West of England, the Midlands, and beyond. This requires more capacity than the current network can provide. The key bottleneck preventing this from being realised is the tunnel between Southampton Central and St Denys.

To realise these ambitions, a longer- term package of interventions is needed to unlock significant capacity and, potentially, shorter journey times between Southampton and Portsmouth City Centres. This could include developing an entirely new rail link (most likely underground) between Southampton Central and the Netley Line.

The key benefits of this package are:

- Transformational capacity and connectivity benefits – especially on east-west rail journeys (30 to 35 minute Southampton – Portsmouth journeys every 15 minutes).
- Supports regeneration of Southampton City Centre and other growth areas.
- Boosts to GVA in a relatively deprived part of the South East.
- Enables a large reduction in carbon emissions.

Key benefits include, by 2050:

- Over 2,000 further jobs created
- 1,000 more new residents

2.3. South Hampshire Mass Transit

TfSE and key partners in the South Hampshire area believe the South Hampshire conurbation is large enough and dense enough to support world-class mass transit systems.

Portsmouth City Council is developing and delivering a comprehensive high quality bus rapid transit that will serve the Portsmouth City Region.

Southampton City Council also aspires to develop a Mass Transit System for their city region – which could take the form of a tram, ferries, and/or Bus Rapid Transit. Mass Transit proposals would span beyond the City boundaries into neighbouring parts of Hampshire.

This package also includes interventions to develop strategic mobility hubs to improve access while helping to reduce vehicle traffic in urban areas, and improve access for peninsulas/islands, in particular, through improving and expanding bus and ferry services.

Key benefits include, by 2050:

- Over 100,000 more mass transit trips each weekday
- With 65,000 fewer car trips each weekday

2.4. South Hampshire Active Travel

All three Local Transport Authorities in the South Hampshire area have ambitious plans to reduce congestion and public health outcomes by increasing rates of cycling and walking in their areas.

This ambition is supported by this study as improving the quality and attractiveness of active travel infrastructure, particularly in urban areas and where it improves links with public transport options, is a highly cost-effective way to give people greater choice and reduce the demand for private vehicle trips on local roads and the strategic highways network. Reducing unnecessary trips in this way helps make best use of existing roads and reduce or even remove the need for some more expensive highways capacity improvements.

Several highways interventions – including the Southampton West Quay scheme – unlock opportunities for pedestrians and cyclists by freeing up more public space in town and city centres. The key benefits of this package are:

- Material improvements to the urban realm of the Solent Built Up Area, unlocking active travel and regeneration opportunities.
- Better air quality in urban areas.
- Significant mode shift from car to active travel, with associated health and wellbeing and road space efficiency benefits.

These interventions significantly boost active travel demand by over 80,000 trips a day and reduce car travel by a similar margin, by 2050. This package also leads to a significant reduction in carbon emissions.

Almost 40,000 tonnes less CO_2e equivalent emitted a year in by 2050.

2.5. Isle of Wight Connections

Based on stakeholder feedback and available opportunities, TfSE has developed a combined package to improve connectivity between the Isle of Wight and the Mainland and boost connectivity within the Isle of Wight itself.

The first area focuses on improving the quality, connectivity and frequency of ferry crossings through increasing frequency, extending hours of operation, opening new routes and subsidising ferry fares.

Given the island's size and population density there is a large market for public transport, and the absence of a fixed link to the mainland suppresses the availability of cars to many visitors.

This package includes a proposal to provide mass transit between Newport and Sandown as well as the seamless integration between ferry and public transport on the mainland and the Isle of Wight to support sustainable onward connectivity as well as encouraging increased tourism in the area.

Key benefits include, by 2050:

- An additional £165 million GVA annually
- 70,000 fewer car trips on the island each weekday

Figure 4: Isle of Wight packages of interventions

[Map of Isle of Wight and connections with mainland using coloured lines to indicate types of rail, highways, mass transit and strategic active travel interventions. Shaded areas indicate protected areas as well as active travel and mass transit corridors]

Note: List of interventions refers to the Isle of Wight area only (Packages D — E).

Connectivity Package

- **D1** New Isle of Wight Mass Transit System and Active Travel Enhancements

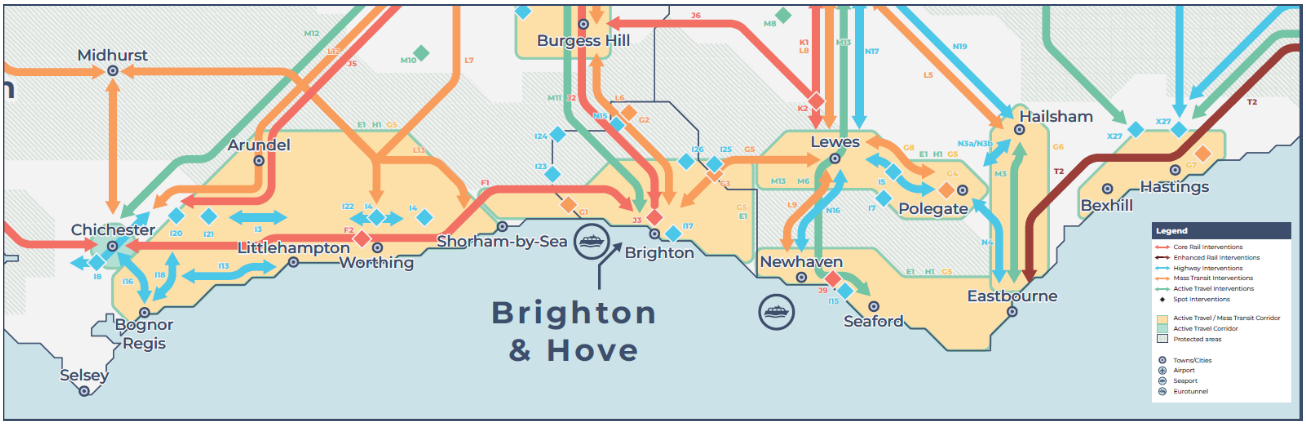
- **D1a** Bus Mass Transit - Newport to Yarmouth
- **D1b** Bus Mass Transit - Newport to Ryde
- **D1c** Bus Mass Transit - Newport to Cowes
- **D1d** Isle of Wight Railway Service Enhancements
- **D1e** Isle of Wight Railway Extensions or Mass Transit alternative - Shanklin to Ventnor**D1f** Isle of Wight Railway Extensions or Mass Transit alternative - Shanklin to Newport**D2** Isle of Wight Ferry Service Enhancements
- **D2a** Operating Hours and Frequency Enhancements
- **D2b** New Summer Route - Ryde to Southampton

Active Travel

- **E1** Solent Active Travel (including LCWIPs)

Figure 5: Sussex Coast packages of interventions

[Map of Sussex Coast showing area between Chichester and Hastings including Brighton & Hove using coloured lines to indicate types of rail, highways, mass transit and strategic active travel interventions. Shaded areas indicate protected areas as well as active travel and mass transit corridors]



Note: List of interventions refers to the Sussex Coast area only (Packages E — I).

Rail Package

- **F1** West Coastway Strategic Study
- **F2** West Worthing Level Crossing Removal

Active Travel

- **E1** Solent Active Travel (including LCWIPs)
- **H1** Sussex Coast Active Travel Enhancements (including LCWIPs)

Mass Transit

- **G1** Shoreham Strategic Mobility Hub
- **G2** A27/A23 Patcham Interchange Strategic Mobility Hub
- **G3** Falmer Strategic Mobility Hub
- **G4** Eastbourne/Polegate Strategic Mobility Hub
- **G5** Sussex Coast Mass Rapid Transit
- **G6** Eastbourne/Wealden Mass Rapid Transit
- **G7** Hastings/Bexhill Mass Rapid Transit
- **G8** A27 Falmer – Polegate Bus Stop and Layby Improvements

Highways

- **I1** M27 Junction 8 (RIS2)
- **I2** A31 Ringwood (RIS2)
- **I3** A27 Arundel Bypass (RIS2)
- **I4** A27 Worthing and Lancing Improvement (RIS2)
- **I5** A27 East of Lewes Package (RIS2)
- **I6** Southampton Access (M27 Junction 2 and Junction 3) (RIS3 Pipeline)
- **I7** A27 Lewes - Polegate (RIS3 Pipeline)
- **I8** A27 Chichester Improvements (RIS3 Pipeline)
- **I9** A326 Capacity Enhancements (LLM)
- **I10** West Quay Realignment (LLM)
- **I11** Portsmouth City Centre Road (LLM)
- **I12** Northam Rail Bridge Replacement and Enhancement (MRN)
- **I13** New Horsea Bridge and Tipner Bridge
- **I14** A259 Bognor Regis to Littlehampton Enhancement (MRN)
- **I15** A259 South Coast Road Corridor - Eastbourne to Brighton (MRN)
- **I16** A259 Chichester to Bognor Regis Enhancement (MRN Pipeline)
- **I17** A259 (King’s Road) Seafront Highways Structures Renewal Programme (MRN)
- **I18** A29 Realignment including combined Cycleway and Footway
- **I19** M27/M271/M275 Smart Motorway(s)
- **I20** A27 Tangmere Junction Enhancements
- **I21** A27 Fontwell Junction Enhancements
- **I22** A27 Worthing (Long Term Solution)
- **I23** A27 Hangleton Junction Enhancements

- **I24** A27 Devils Dyke Junction Enhancements
- **I25** A27 Falmer Junction Enhancements
- **I26** A27 Hollingbury Junction Enhancements

2.6. Sussex Coast Rail

Network Rail has worked with Local Transport Authorities to develop a package of improvements in the West Coastway Strategic Study, formerly Connectivity Modular Strategic Study Plan (CMSP) that deliver faster journeys and more capacity between Brighton and Hove and Southampton. This will support faster inter-urban and long-distance journeys between the South East's two largest conurbations.

The key benefits of this package are:

- Faster journeys between Brighton, Chichester, Portsmouth and Southampton.
- Potentially more frequent longer distance services between Brighton, Chichester, Portsmouth, and Southampton.
- Additional capacity between Worthing and Brighton for shorter journeys.

This package makes a significant contribution to strengthening east – west connectivity between the two largest conurbations in the South East as well as encouraging increased tourism in the area.

Key benefits include, by 2050:

- £80 million GVA annually
- 10,000 additional rail trips each weekday

2.7. Sussex Coast Mass Transit

Brighton and Hove City Council is developing plans for a high-quality public transport system along the Brighton seafront. The details are to be finalised, but the topology of the city lends itself strongly to bus rapid transit (e.g., more frequent "turn up and go" and faster services on dedicated bus lanes and other priority infrastructure).

TfSE and its partners have carefully considered whether this system could also serve East and West Sussex. At this stage, extending to East Sussex appears to be more feasible than West Sussex.

Additionally, East Sussex is developing proposals for improved public transport services in Eastbourne and Hastings. All these systems could be supported by general improvements to other local bus services buses and Strategic Mobility Hubs, notably at Falmer and Polegate (options for other hubs are more challenging but should be explored). These hubs will improve access while helping to reduce vehicle traffic in urban areas.

It delivers a "world class" mass transit system with significant mode shift from car to bus services and provides an attractive and sustainable option for east – west local journeys along the South East coast. It also reduces carbon and boosts GVA by over £100m each year by 2050.

Key benefits include over 100,000 more mass transit trips each weekday, with 65,000 fewer car trips by 2050.

2.8. Sussex Coast Active Travel

All three Local Transport Authorities on the Sussex Coast have ambitious plans to reduce congestion and public health outcomes by increasing rates of cycling and walking in their areas. This package aims to help these authorities realise this ambition.

Improving the quality and attractiveness of active travel infrastructure will give people greater transport choice and reduce the demand for private vehicle trips on local roads and the strategic highways network, making better use of existing roads and reducing the need for some more expensive highways capacity improvements.

Several smaller scale highways interventions are also included to support housing growth along the Sussex Coast. Most of these interventions also include public transport and active travel elements.

The key benefits of this package are:

- Material improvements to the urban realm of the Sussex Coast built up area, unlocking active travel and regeneration opportunities as well as encouraging increased tourism in the area.
- Improvements in air quality in urban areas.
- Significant potential mode shift from car to active travel, with associated health and wellbeing and road space efficiency benefits.

Key benefits include:

- 5,000 tonnes less CO_2e emitted a year by 2050
- Over 40,000 fewer car trips each weekday by 2050
- Significant public health benefits

2.9. Solent and Sussex Coast Highways

Targeted, integrated interventions to deliver high-quality east – west connections for freight, private and mass transit vehicles (notably, buses) that de-conflict local and longer-distance traffic, with the greatest benefit when supporting and supported by public transport improvements.

Interventions that deliver safer highways, notably in urban areas, and support access to international gateways, housing/ regeneration/growth areas, and placemaking (e.g., unlocking public spaces) are featured.

This package has been refined to minimise carbon emissions and the impact of these interventions on the wider environment. The interventions aim to deliver modest improvements to the Strategic Road Network that focus on segregating strategic and regional traffic rather than materially lifting capacity along the whole corridor.

Further mitigation will be needed as these schemes are developed. They will also be complimented by the Global Policy interventions discussed above, which will accelerate the decarbonisation of road vehicles and mitigate the adverse impacts of this package.

A better designed highways network will deliver improved air quality in urban areas and reduce impact of road traffic on the South Downs National Park.

3. London to Sussex Coast

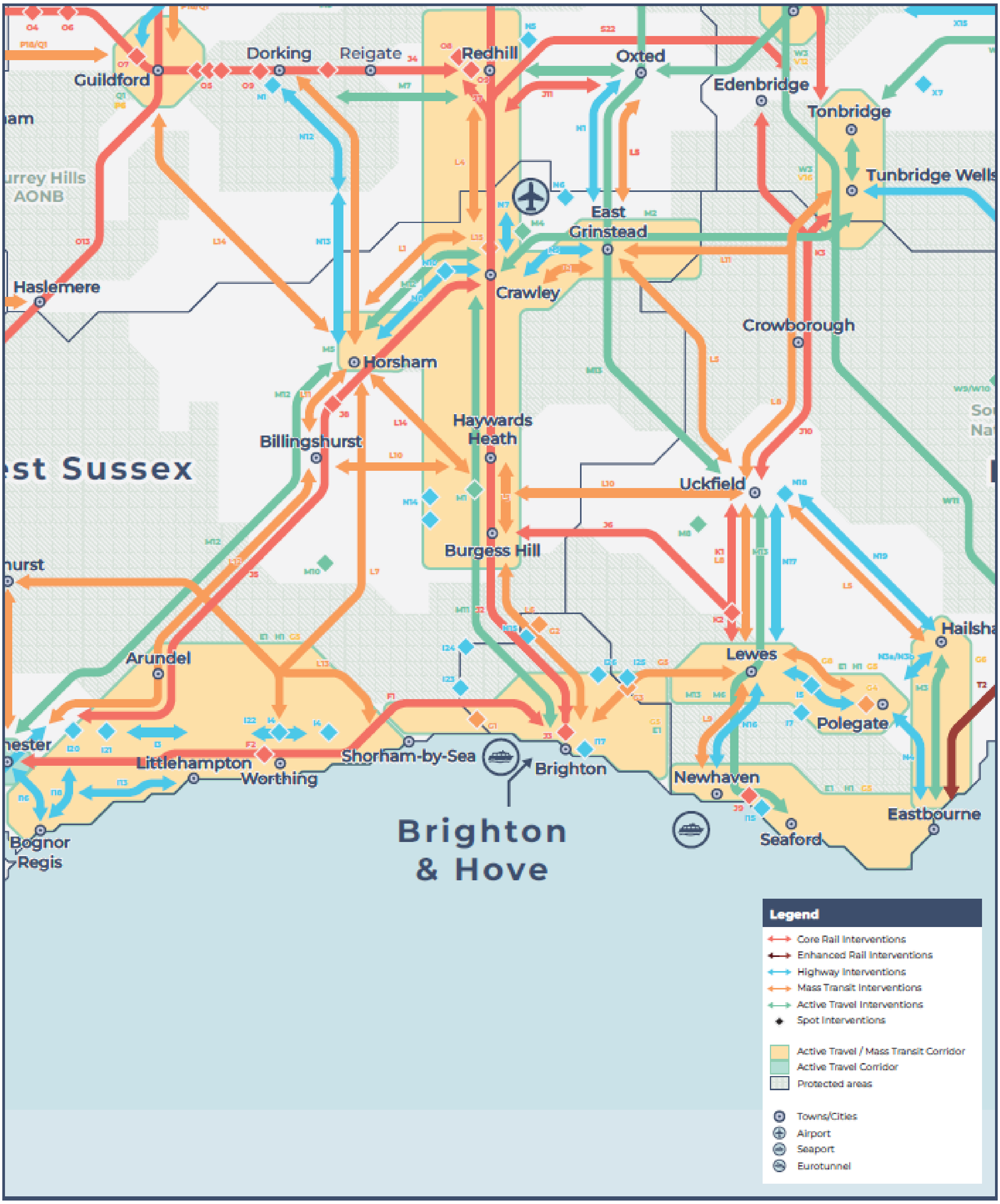
The London to Sussex Coast area covers the key corridors between London and the Sussex Coast conurbation (from Chichester to Eastbourne). It focusses on interventions in East Surrey, West Sussex and East Sussex (excluding the Hastings area).

TfSE has developed five packages of interventions for this area with a total expected capital investment of £3.6 billion and £0.6 billion in additional economic value each year by 2050.

Figure 6 displays the packages of interventions for the London to Sussex Coast area.

Figure 6: London to Sussex coast packages of interventions

[Map of area between London and Sussex Coast including Brighton & Hove using coloured lines to indicate types of rail, highways, mass transit and strategic active travel interventions. Shaded areas indicate protected areas as well as active travel and mass transit corridors]



Note: List of interventions refers to London to Sussex Coast area only (Packages J — N).

Rail Packages

- **J1** Croydon Area Remodelling Scheme
- **J2** Brighton Main Line - 100mph Operation
- **J3** Brighton Station Additional Platform
- **J4** Reigate Station Upgrade
- **J5** Arun Valley Line - Faster Services
- **J6** East Coastway Line - Faster Services
- **J7** Brighton Main Line - Reinstate Cross Country Services
- **J8** New Station to the North East of Horsham
- **J9** Newhaven Port Capacity and Rail Freight Interchange Upgrades
- **J10** Uckfield Branch Line - Hurst Green to Uckfield Electrification
- **J11** Redhill Aerodrome Chord
- **K1** Uckfield - Lewes Wealden Line Reopening - Traction and Capacity Enhancements
- **K2** Uckfield - Lewes Wealden Line Reopening - Reconfiguration at Lewes
- **K3** Spa Valley Line Modern Operations Reopening - Eridge to Tunbridge Wells West to Tunbridge Wells

Active Travel

- **M1** Burgess Hill/Haywards Heath Local Active travel infrastructure
- **M2** East Grinstead Local Active travel infrastructure
- **M3** Eastbourne/Hailsham Local Active travel infrastructure
- **M4** Gatwick/Crawley Local Active travel infrastructure
- **M5** Horsham Local Active travel infrastructure
- **M6** Lewes/Newhaven Local Active travel infrastructure
- **M7** Reigate/Redhill Local Active travel infrastructure
- **M8** East Sussex Inter-urban Active travel infrastructure
- **M9** Surrey Inter-urban Active travel infrastructure
- **M10** West Sussex Inter-urban Active travel infrastructure
- **M11** New London - Brighton National Cycle Network Corridor
- **M12** New Crawley - Chichester National Cycle Network Corridor
- **M13** London - Paris New “Avenue Verte”

Mass Transit

- **L1** Fastway Extension: Crawley - Horsham

- **L2** Fastway Extension: Crawley - East Grinstead
- **L3** Fastway Extension: Haywards Heath - Burgess Hill
- **L4** Fastway Extension: Crawley - Redhill
- **L5** A22 Corridor Rural Bus Service Enhancements
- **L6** A23 Corridor Rural Bus Service Enhancements
- **L7** A24 Corridor Rural Bus Service Enhancements
- **L8** A26 Corridor Lewes - Royal Tunbridge Wells Rural Bus Service Enhancements
- **L9** A26 Corridor Newhaven Area Rural Bus Service Enhancements
- **L10** A272 Corridor Rural Bus Service Enhancements
- **L11** A264 Corridor Rural Bus Service Enhancements
- **L12** A29 Corridor Rural Bus Service Enhancements
- **L13** A283 Corridor Rural Bus Service Enhancements
- **L14** A281 Corridor Rural Bus Service Enhancements
- **L15** Three Bridges Strategic Mobility Hub

Highways

- **N1** A22 N Corridor (Tandridge) - South Godstone to East Grinstead Enhancements (LLM Pipeline)
- **N2** A24/A243 Knoll Roundabout and M25 J9A (MRN Pipeline)
- **N3a** A22 Corridor Package
- **N3b** A22 Corridor - Hailsham to Uckfield
- **N4** A2270/A2101 Corridor Movement and Access Package (MRN Pipeline)
- **N5** M23 Junction 8a New Junction and Link Road - Redhill
- **N6** M23 Junction 9 Enhancements - Gatwick
- **N7** A23 Carriageway Improvements - Gatwick to Crawley
- **N8** A264 Horsham - Pease Pottage Carriageway Enhancements
- **N9** A264 Crawley - East Grinstead Dualling and Cycleway
- **N10** Crawley Western Link Road and Active Travel Infrastructure
- **N11** A24 Dorking Bypass
- **N12** A24 Horsham to Washington Junction Improvements
- **N13** A24 Corridor Improvements Horsham to Dorking (LLM Pipeline)
- **N14** A23 Hickstead and Bolney Junction Enhancements
- **N15** A23/A27 Patcham Interchange Junction Enhancements
- **N16** A26 Lewes - Newhaven Realignment and Junction Enhancements

- **N17** A26 Lewes - Uckfield Enhancements
- **N18** A22 Uckfield Bypass Dualling
- **N19** A22 Smart Road Trial Proposition Study

3.1. London – Sussex Coast Rail

This package addresses key bottlenecks on the Brighton Main Line, enabling faster, more reliable services and increases in decarbonised capacity across rail operations in the region.

Additionally, there are aspirations to reinstate the railways between Uckfield – Lewes and, potentially, Tunbridge Wells West – Tunbridge Wells to increase resilience of rail connectivity between the South Coast and London whilst creating a new east – west passenger rail service.

These results should give investors confidence in the level of growth that could be realised through investing in the Brighton Main Line corridor.

This package could deliver a very significant 20% increase in rail patronage compared to "Business as Usual" forecasts

Key benefits include, by 2050:

- At least 20,000 fewer car trips each weekday
- More than 85,000 additional trips by rail each weekday

3.2. London – Sussex Coast Mass Transit

Infrastructure improvements and increased service frequency will bring transformational growth in bus journeys – almost 120,000 addition trips a day by 2050.

This package builds on the success of the Fastway bus rapid transit system in Crawley/Gatwick and will be supported by improvements to local buses and Strategic Mobility Hubs at Falmer and Three Bridges to improve access while helping to reduce vehicle traffic in urban areas.

The overall mass transit network and service provision will be designed to provide an integrated network which facilitates seamless journeys across the area and beyond.

The interventions in this package will bring significant mode shift from car to bus through better interchange and journey experiences with improvements in the speed, frequency and connectivity of mass transit services.

Key benefits include, by 2050:

- 15,000 tonnes less CO_2e emitted a year
- 130,000 fewer car trips each weekday

3.3. London – Sussex Coast Active Travel

Active travel investment will be a significant contribution towards reducing carbon emissions along the London – Sussex Coast corridor.

All four Local Transport Authorities in the area have ambitious plans to improve cycling and walking in their areas. This package expands on current plans by delivering improvements to the National Cycle Network routes and continued roll-out of regional cycleways with consistent branding and wayfinding.

Improving the quality and attractiveness of active travel infrastructure will give people greater transport choice and reduce the demand for private vehicle trips on local roads and the strategic highways network, making better use of existing roads and reducing the need for some more expensive highways capacity improvements.

Active travel investment would boost cycling and walking by 3.5% and encourage further mode shift from car to active travel modes. It would also offset some of the abstraction from active travel generated by improvements in Public Transport

Improvements to the urban and rural public realm will improve air quality (particularly in urban areas) and quality of life while unlocking less car-dependent regeneration opportunities as well as encouraging increased tourism in the area.

Key benefits include:

- Significant public health benefits
- 70,000 fewer car trips each weekday by 2050
- Over 80,000 additional active travel trips expected by 2050

3.4. London – Sussex Coast Highways

This package includes interventions that support access to international gateways (M23 Junction 9), regeneration areas (Crawley Western Link Road) and placemaking (Uckfield and Godstone Bypasses unlocking public spaces). It also includes junction improvements and possible new roads to help relieve pressure on the existing network (for example, to increase the speed and reliability of bus services).

This package also looks to relieve pressure where road and rail interact at level crossings in particular and unlock opportunities to reallocate road-space to active travel and public transport.

By strengthening the resilience of transport networks, and by supporting housing and employment growth, this package unlocks significant economic benefits (up to £140m GVA per annum) but does yield an increase in carbon emissions – which may be mitigated through a combination of the Global Policy interventions discussed above and improved integration with rail and mass transit for all or part of journeys.

Key benefits include:

- A more reliable and resilient highways network – including a high-quality secondary route from the Sussex Coast to the M25.
- 1,300 additional jobs created by 2050
- An additional £140m of GVA a year by 2050

4. Wessex Thames

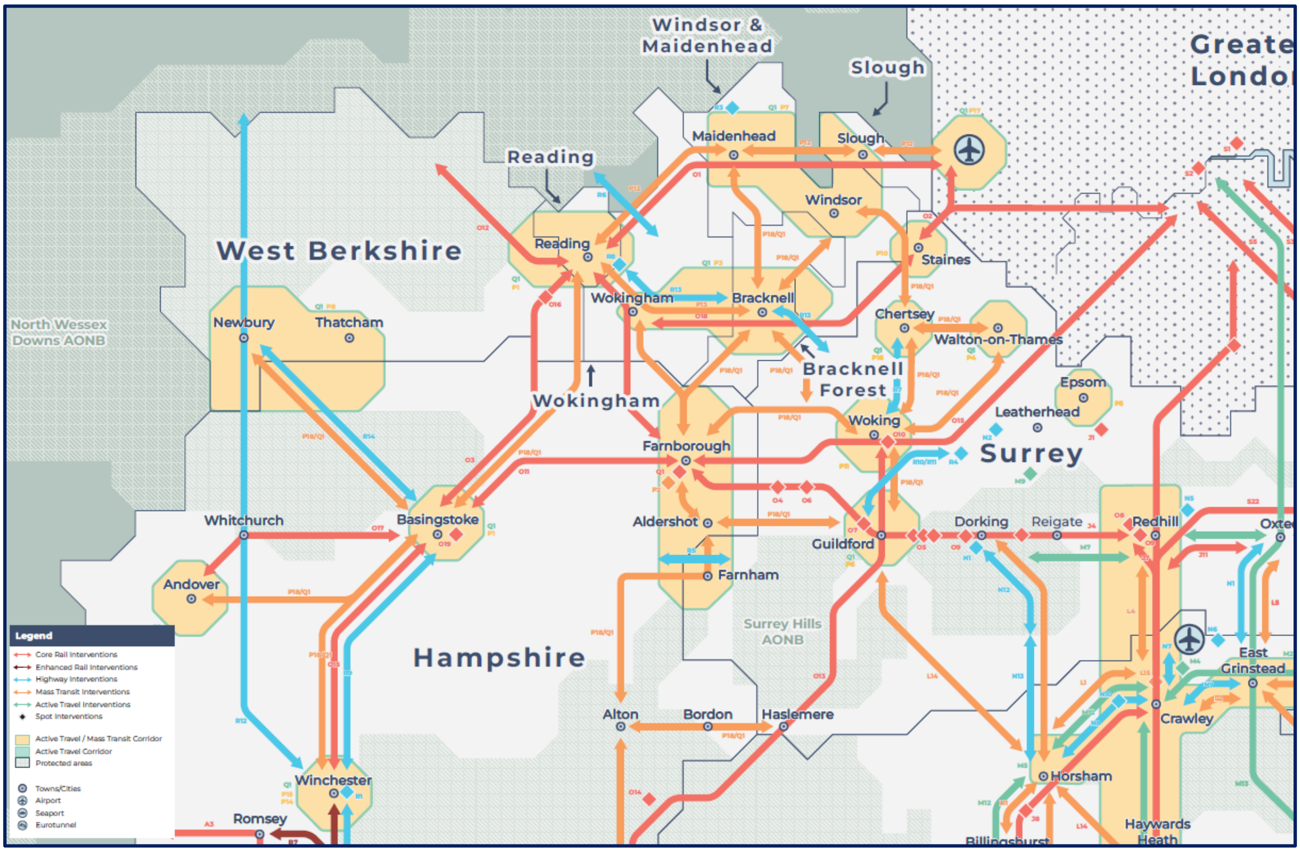
The area TfSE refers to as Wessex Thames includes the whole of Berkshire, North Hampshire, and West Surrey. It's boundaries broadly align with the Berkshire Thames Valley and Enterprise M3 Local Enterprise Partnerships.

TfSE has developed three packages of interventions for this area with a total expected capital investment of £10.4 billion and £1.2 billion in additional economic value each year by 2050.

Figure 7 shows the packages of interventions for the Wessex Thames area.

Figure 7: Wessex Thames packages of interventions

[Map including areas of West Berkshire, Surrey and Hampshire including Reading and Woking using coloured lines to indicate types of rail, highways, mass transit and strategic active travel interventions. Shaded areas indicate protected areas as well as active travel and mass transit corridors]



Note: List of interventions refers to the Wessex Thames area only (Packages O — R).

Rail Package

- **O1** Western Rail Link to Heathrow
- **O2** Southern Rail Link to Heathrow
- **O3** Reading to Basingstoke Enhancement
- **O4** North Downs Line - Electrification
- **O5** North Downs Line - Level Crossing Removals

- **O6** North Downs Line - Service Level and Capacity Enhancements
- **O7** Guildford Station Upgrade
- **O08** New Station Guildford West (Park Barn)
- **O09** New Station Guildford East (Merrow)
- **O10** Redhill Station Upgrade
- **O11** Dorking Deepdene Station Upgrade
- **O12** South West Main Line / Portsmouth Direct Line - Woking Area Capacity Enhancement
- **O13** South West Main Line / Basingstoke Branch Line - Basingstoke Enhancement Scheme
- **O14** Cross Country Service Enhancements
- **O15** Portsmouth Direct Line - Line Speed Enhancements
- **O16** Portsmouth Direct Line - Buriton Tunnel Upgrade
- **O17** South West Main Line - Dynamic Signalling
- **O18** Theale Strategic Rail Freight Terminal
- **O19** West of England Main Line - Electrification from Basingstoke to Salisbury
- **O20** Reading to Waterloo Service Enhancements

Mass Transit

- **P1** Basingstoke Mass Rapid Transit
- **P2** Blackwater Valley Mass Rapid Transit
- **P3** Bracknell/Wokingham Bus Enhancements
- **P4** Elmbridge Bus Enhancements
- **P5** Epsom/Ewell Bus Enhancements
- **P6** Guildford Sustainable Movement Corridor
- **P7** Slough/Windsor/Maidenhead Area Bus Enhancements
- **P8** Newbury/Thatcham Bus Enhancements
- **P9** Reading Mass Rapid Transit
- **P10** Spelthorne Bus Enhancements
- **P11** Woking Bus Enhancements
- **P12** A4 Reading - Maidenhead - Slough - London Heathrow Airport Mass Rapid Transit
- **P13** A329/B3408 Reading - Bracknell/ Wokingham Mass Rapid Transit
- **P14** Winchester Bus Enhancements
- **P15** Andover Bus Enhancements
- **P16** Runnymede Bus Enhancements

- **P17** London Heathrow Airport Bus Access Enhancements
- **P18** Berkshire, Hampshire and Surrey Inter-urban Bus Enhancements

Active Travel

- **Q1** Berkshire, Hampshire and Surrey Urban and Inter-urban Active Travel Infrastructure

Highways

- **R1** M3 Junction 9 (RIS2)
- **R2** M3 Junction 9 - Junction 14 Smart Motorway (SMP)
- **R3** A404 Bisham Junction (RIS3 Pipeline)
- **R4** A3/A247 Ripley South (RIS3 Pipeline)
- **R5** A31 Farnham Corridor (LLM)
- **R6** New Thames Crossing East of Reading (LLM)
- **R7** A320 North Corridor (HIF)
- **R8** M4 Junction 10 Safety Enhancements
- **R9** M3 Junction 7 and Junction 8 Safety and Capacity Enhancements
- **R10** A3 Guildford Local Traffic Segregation
- **R11** A3 Guildford Long Term Solution
- **R12** A34 Junction and Safety Enhancements
- **R13** A322 and A329(M) Smart Corridor
- **R14** A339 Newbury to Basingstoke Safety Enhancements
- **R15** M4 Junction 3 to Junction 12 Smart Motorway (SMP)

4.1. Wessex Thames Rail

A transformational change in orbital and east-west rail connectivity. The package includes new infrastructure interventions with significant regional, national and international benefit, with the largest being to establish new rail links between the region and Heathrow Airport, and enhancing onward connectivity through the wider South East.

Targeted infrastructure enhancements will also translate to more capacity, improved resilience and reliability, and more frequent passenger and freight services, including to the Solent Ports.

This package boosts the number of rail trips enabling residents, employees and visitors to sustainably engage with the regional economy by rail from all directions.

The packages combine to increase the number of local and strategic orbital rail trips by 13,500. They also deliver a boost to the economy, generating more employment opportunities and growing GVA by £850m a year by 2050.

Key benefits include by 2050:

- At least 90,000 additional rail trips each weekday
- More than 3,700 new jobs created
- More than 3,000 new residents accommodated
- 15,000 tonnes less of CO_2e emitted a year

4.2. Wessex Thames Mass Transit

Better interchange and service quality will be provided at Strategic Mobility Hubs, integrating bus services with the national rail networks and local active travel, as well as opportunities for shared mobility services such as e-bike hire, local "click and collect" facilities, and co-location with convenience stores and cafes.

This package aims to increase frequency, operating hours, reliability, and catchment of bus services, supported with bus priority infrastructure where appropriate, to improve interurban bus services between the major economic hubs in Berkshire, North Hampshire and West Surrey.

Interventions in this package will help the region achieve a significant mode shift from car to bus and active travel that will reduce congestion on the existing road network.

Key benefits include, by 2050:

- Almost 450,000 more bus and mass transit trips expected each weekday
- At least 250,000 fewer car journeys each weekday
- 1,300 more jobs supported
- At least 50,000 fewer tonnes CO_2e emitted a year

4.3. Wessex Thames Active Travel

Better infrastructure for walking and cycling will improve the interchange experience and community value. These will improve access while helping to reduce vehicle traffic in urban areas.

This package aims to support the Wessex Thames rail and mass transit interventions by improving the quality of cycling and walking infrastructure to further reduce car dependency in the region, give people greater transport choice, and improve public health outcomes.

The provision of quality active travel infrastructure will improve the efficiency of the existing road and highways network by creating more capacity for those who live further away from rail or mass transit services or for whom walking or cycling may not be a suitable option for all or even part of a given journey. Reducing unnecessary trips in this way also helps reduce or even remove the need for some more expensive highways capacity improvements.

Key benefits include, by 2050:

- 270,000 more active travel trips a day
- 240,000 fewer car journeys each weekday
- 30,000 tonnes less CO_2e emitted a year

4.4. Wessex Thames Highways

This package delivers targeted improvements which support strategic passenger and freight movements through de-conflicting local and longer-distance traffic and supports safety and air quality objectives.

This package includes interventions that support better access to the Solent Ports, a significant contributor to economic growth in the region, as well as interventions which support the sustainable regeneration of areas and local placemaking, such as A3 Guildford, the A320 North Corridor and a new River Thames Cross in the east of Reading.

These schemes are designed to unlock opportunities to reallocate road-space to active travel and buses to deliver complementary public transport improvements.

Some highways interventions can present a trade-off between economic growth and carbon emissions. The economic benefit of accommodating more freight and unlocking growth in this area is a key objective for TfSE, and this package helps towards that.

Key benefits include:

- Improved air quality in urban areas
- An additional £90 million GVA a year by 2050

5. Kent, Medway and East Sussex

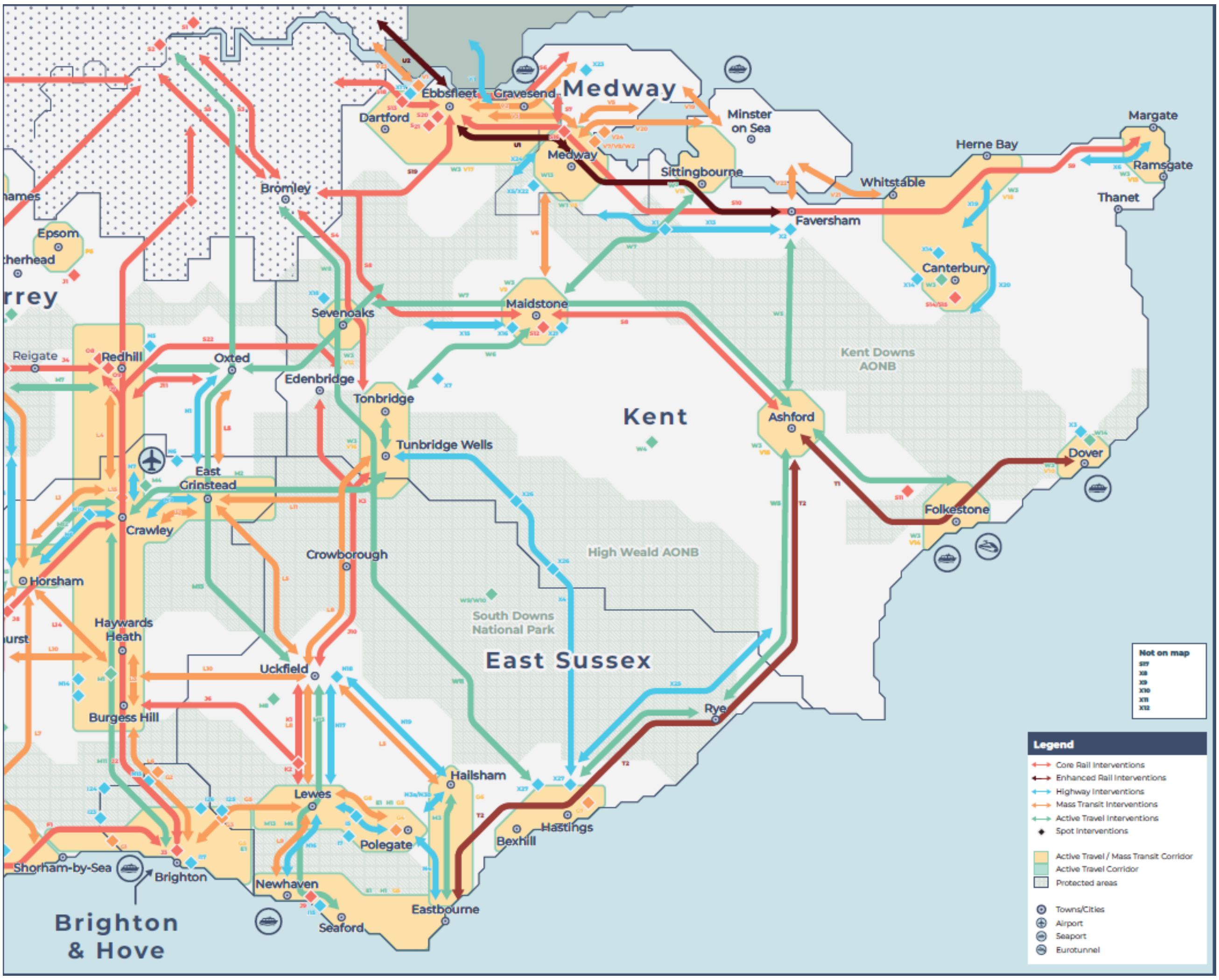
This area covers the whole of Kent and Medway, and the Hastings and Rother areas of East Sussex. It broadly reflects the Network Rail "Kent" Route and the area in the South East served by the "Integrated Kent" passenger rail franchise.

TfSE has developed seven packages of interventions for this area with a total expected capital investment of £19.4 billion and £0.75 billion in additional economic value each year by 2050, along with the long-term capacity and resilience required to keep the country's most important gateway to trade with mainland Europe operating efficiently.

Figure 8 provides the packages of interventions proposed over the next 30 years.

Figure 8: Kent, Medway and East Sussex packages of interventions

[Map including areas of Medway, Kent and East Sussex including Ebbsfleet, Ashford and Eastbourne using coloured lines to indicate types of rail, highway, mass transit and strategic active travel interventions. Shaded areas indicate protected areas as well as active travel and mass transit corridors]



Note: List of interventions refers to the Kent, Medway, and East Sussex area only (Packages S — Y).

Classic Rail Package

- **S1** St Pancras International Domestic High Speed Platform Capacity
- **S2** London Victoria Capacity Enhancements - Signalling and Digital Rail
- **S3** Bakerloo Line Extension
- **S4** South Eastern Main Line - Chislehurst to Tonbridge Capacity Enhancements
- **S5** London Victoria to Shortlands Capacity Enhancements
- **S6** Hoo Peninsula Passenger Rail Services
- **S7** North Kent Line / Hundred of Hoo Railway - Rail Chord
- **S8** Thameslink - Extension to Maidstone and Ashford
- **S9** North Kent Line - Service Enhancements
- **S10** North Kent Line / Chatham Main Line - Line Speed Enhancements
- **S11** Otterpool Park/Westenhanger Station Platform Extensions and Station Upgrade **S12** Integrated Maidstone Stations
- **S13** Dartford Station Remodelling/ Relocation
- **S14** Canterbury Interchange Rail Chord
- **S15** New Station - Canterbury Interchange
- **S16** New Strood Rail Interchange
- **S17** Rail Freight Gauge Clearance Enhancements
- **S18** Crossrail - Extension from Abbey Wood to Dartford/Ebbsfleet
- **S19** High Speed 1 / Waterloo Connection Chord - Ebbsfleet Southern Rail Access
- **S20** Ebbsfleet International (Northfleet Connection)
- **S21** Ebbsfleet International (Swanscombe Connection)
- **S22** Gatwick - Kent Service Enhancements

High Speed Rail Package

- **T1** High Speed East - Dollands Moor Connection
- **T2** High Speed 1 / Marsh Link - Hastings, Bexhill and Eastbourne Upgrade
- **U1** High Speed 1 - Link to Medway (Chatham)
- **U2** High Speed 1 - Additional Services to West Coast Main Line

Mass Transit

- **V1** Fastrack Expansion - Swanscombe Peninsula
- **V2** Fastrack Expansion - Northfleet to Gravesend
- **V3** Fastrack Expansion - Medway

- **V4** Medway Mass Transit
- **V5** Medway Mass Transit - Extension to Hoo Peninsula
- **V6** Medway to Maidstone Bus Priority
- **V7** Medway Mass Transit - Chatham to Medway City Estate New Bridge
- **V8** Medway Mass Transit - Chatham to Medway City Estate Water Taxi
- **V9** Maidstone Bus Enhancements
- **V10** Dover Bus Rapid Transit
- **V11** Sittingbourne Bus Enhancements
- **V12** Sevenoaks Bus Enhancements
- **V13** Thanet Bus Enhancements
- **V14** Folkestone Bus Enhancements
- **V15** Ashford Bus Enhancements
- **V16** Royal Tunbridge Wells/Tonbridge Bus Enhancements
- **V17** Thames Gateway/Gravesham Bus Enhancements
- **V18** Canterbury/Whitstable/Herne Bay Bus Enhancements
- **V19** Ferry Crossings - New Sheerness to Hoo Peninsula Service
- **V20** Ferry Crossings - Sheerness to Chatham/Medway City Estate/ Strood Enhancements
- **V21** Ferry Crossings - Ebbsfleet - Tilbury Enhancements
- **V22** Inland Waterway Freight Enhancements

Active Travel

- **W1** Medway Active Travel Enhancements
- **W2** Medway Active Travel - Chatham to Medway City Estate River Crossing
- **W3** Kent Urban Active Travel Infrastructure
- **W4** Kent Inter-urban Active Travel Infrastructure
- **W5** Faversham - Canterbury - Ashford - Hastings National Cycle Network Enhancements
- **W6** Tonbridge - Maidstone National Cycle Network Enhancements
- **W7** Sevenoaks - Maidstone - Sittingbourne National Cycle Network Enhancements
- **W8** Bromley - Sevenoaks - Royal Tunbridge Wells National Cycle Network Enhancements
- **W9** East Sussex Local Active Travel Infrastructure
- **W10** East Sussex Inter-urban Active Travel Infrastructure
- **W11** Royal Tunbridge Wells - Hastings National Cycle Network Enhancements
- **W12** Canterbury Placemaking and Demand Management Measures

- **W13** Medway Placemaking and Demand Management Measures
- **W14** Dover Placemaking and Demand Management Measures

Highways

- **X1** M2 Junction 5 (RIS2)
- **X2** A2 Brenley Corner Enhancements (RIS3 Pipeline)
- **X3** A2 Dover Access (RIS3 Pipeline)
- **X4** A21 Safety Enhancements (RIS3 Pipeline, brought forward to RP2)
- **X5** A229 Bluebell Hill Junction Upgrades (LLM)
- **X6** A28 Birchington, Acol and Westgate-on-Sea Relief Road (MRN)
- **X7** A228 Colts Hill Strategic Link (MRN Pipeline)
- **X8** Digital Operations Stack and Brock
- **X9** A20 Enhancements for Operations Stack & Brock
- **X10** Kent Lorry Parks (Long Term Solution)
- **X11** Dover Freight Diversification
- **X12** A2 Canterbury Junctions Enhancements
- **X13** M2 Junction 4 - Junction 7 Smart Motorway (SMP)
- **X14** M20 Junction 6 Sandling Interchange Enhancements
- **X15** M20 Junction 3 - Junction 5 Smart Motorway
- **X16** M25 Junction 1a Enhancements
- **X17** M25 Junction 5 Enhancements
- **X18** Herne Relief Road
- **X19** Canterbury East Relief Road
- **X20** New Maidstone South East Relief Road
- **X21** A228 Hoo Peninsula Enhancements
- **X22** A228 Medway Valley Enhancements
- **X23** Strood Riverside Highways Enhancement and Bus Lane
- **X24** A259 Level Crossing Removals – East of Rye
- **X25** A21 Kippings Cross to Lamberhurst Dualling and Flimwell and Hurst Green Bypasses
- **X26** Hastings and Bexhill Distributor Roads
- **Y1** Lower Thames Crossing (costings for Kent-side only)

5.1. Kent, Medway and East Sussex Classic Rail

A significant boost for employment and economic growth, unlocking £139 million in GVA per annum by 2050.

This package adds capacity to the classic rail network in the South East Area and has strong synergies with the Kent, Medway, and East Sussex high speed rail package which aims to serve communities further away from the Capital.

This package includes several interventions that will increase service capacity and others that will improve integration of the rail system – notably at Ebbsfleet, Canterbury, Maidstone, and Strood – where several railways cross each other without providing easy interchange from one railway to another.

It also includes the introduction of passenger rail services on the Grain Branch on the Hoo Peninsula and direct services between Gatwick Airport and Mid/East Kent.

Key benefits include, by 2050:

- 35,000 additional weekday rail trips
- Over 1,500 new jobs created
- 6,000 new residents
- 15,000 tonnes less CO_2e emitted a year

5.2. Kent, Medway and East Sussex High Speed Rail East

Along with “High Speed Rail North”, this package includes some of the more radical interventions in the Long List for this study.

The “High Speed Rail East” package would deliver direct High Speed services from London to Eastbourne via Ashford and Hastings, reducing journey times from Hastings/Bexhill to London by 20 minutes.

It would also deliver faster journey times to Dover using a connection to HS1 at Dollands Moor, and an increase in the frequency of HS1 services to Ashford.

Key benefits include, by 2050:

- 15,000 tonnes fewer CO_2e equivalent emissions each year
- An additional £125 million of GVA a year

5.3. Kent, Medway and East Sussex High Speed Rail North

Expanding domestic high speed services will deliver transformational improvements in journey times and drive economic growth across the region, including for previously left behind coastal areas.

The “High Speed Rail North” package aims to deliver significant improvements in connectivity to North Kent to ensure coastal communities in Medway, Swale, Canterbury, and Thanet are as well served as other parts of Kent.

Several high-level options have been considered, ranging from a new link between HS1 and Medway to improvements to the North Kent Line and Rochester Bridge. The modelling and cost estimates represented for this package reflects one of the more interventionalist options.

Key benefits include, by 2050:

- 15,000 tonnes fewer CO_2e equivalent emissions each year
- £225 million in GVA each year
- More than 17,000 new residents and over 3,800 new jobs (High Speed Rail East and North)

5.4. Kent, Medway and East Sussex Mass Transit

Significant improvements in the quality, speed and frequency of bus and ferry services in Kent, Medway and East Sussex with better interchange with rail services.

This package delivers improvements to bus services with the scope for improvements and expansion particularly strong in the Kent Thameside and Medway areas, where high levels of growth and regeneration are expected. A step change in infrastructure and service provision should be viable thanks to the underlying demographics in this area.

This package also includes an opportunity to create a new Medway River Crossing to enable faster journeys between the north and south of this conurbation, as well as improvements in connectivity between islands and peninsulas in North Kent.

Key benefits include, by 2050:

- Over 170,000 more trips on bus, mass transit and ferries each weekday
- 100,000 fewer private car trips each weekday
- 25,000 tonnes less CO_2e emitted a year

5.5. Kent, Medway, and East Sussex Active Travel

Material improvements to the urban realm, unlocking active travel and regeneration opportunities.

This package delivers general uplift in the quality of walking and cycling infrastructure, particularly in urban areas (such as those infrastructure gaps highlighted in the recent Kent County Council cycling strategy). Improving the quality and attractiveness of active travel infrastructure will improve public health outcomes, give people greater transport choice and reduce the demand for private vehicle trips on local roads and the strategic highways network.

The package boosts cycling, walking and wheeling and encourages mode shift from car to active travel modes with significant associated health and wellbeing and road space efficiency benefits. Making better use of existing roads will reduce the need for some more expensive highways capacity improvements, while also making a significant contribution towards reducing carbon emissions and improving air quality.

Key benefits include:

- Over 110,000 more trips by walking, wheeling or cycling each weekday
- 100,000 fewer private car return trips each weekday
- 10,000 tonnes less CO_2e emitted

5.6. Lower Thames Crossing

A significantly more resilient corridor connecting the Channel Ports to the M25.

One of the most significant highways interventions planned for this part of the South East is the Lower Thames Crossing, which will deliver a new motorway-standard crossing between Essex and North Kent/Medway.

This is a long standing, nationally-significant scheme that has a considerable impact on the South East's transport system, but in isolation does generate an increase in carbon emissions. To reflect the scale and importance of this scheme, we have modelled it (and some associated ancillary interventions) separately to the rest of the Kent, Medway and East Sussex Highways package based on the most up to date information of a possible scheme.

The Lower Thames Crossing also delivers a boost to GVA (£105 million a year by 2050), and should be considered in the context of both the above Global Policy interventions and close integration with regional rail, mass transit and active transport networks which are currently not included within the core scheme (e.g. dedicated 24-hour bus lanes, associated bus priority measures and even inclusion of active travel links).

TfSE will continue work with the UK and local governments to ensure the design of any crossing is fit for purpose and aligns with our goal to reach net-zero by 2050 at the latest and support the development of low-carbon industries.

Key benefits include, by 2050:

- 170,000 net additional weekday private vehicle trips
- 1,400 new jobs created

5.7. Kent, Medway and East Sussex Highways

This package delivers the Kent Bifurcation strategy improving A2/M2 and A20/M20 routes to increase capacity to and from Dover. This strengthens the resilience of Channel Port access corridors – and improved connectivity for coastal areas.

This package includes several interventions that aim to improve highways resilience and connectivity while also relieving congestion in city and town centres. Many of these interventions will enable housing growth and/or improve public transport and active travel facilities in urban areas. In this sense, highways should be viewed as multi-modal interventions.

These interventions in isolation are projected to increase carbon emissions. This effect will diminish if this package is combined with Global Policy and other rail, mass transit and active travel interventions.

Key benefits include:

- More resilient corridors serving the key Channel Ports and better-connected coastal areas
- An additional £90 million GVA a year by 2050
- 1,000 new jobs created

Benefits and Costs

In 2018, Transport for the South East commissioned Steer to develop a model to test the impact of the scenarios developed in support of the development of the Transport Strategy for the South East.

This model, known as the South East Economy and Land Use Model (SEELUM), is a transport and land use model that simulates the interaction of transport, people, employers, and land-use over periods of time. It provides estimates at a package level and uses different approaches and calculations to local models at a scheme level. More detail is provided in the SEELUM Modelling Report.

SEELUM produces detailed reports on:

- changes in households, population, and the workforce;
- changes in employment (jobs filled) and unemployment rates;
- changes in "tailpipe" CO_2e emissions from transport;
- changes to travel patterns, volumes and mode shares; and
- time-savings benefits for appraisal and impacts on productivity.

To model each package in SEELUM, adjustments were made to:

- Generalised Journey Times (GJTs) – a weighted measure of travel, waiting and transfer/interchange times – within and between each zone (by mode); and
- characteristics of links on the road and railway network (notably capacity).

To model the Global Policy interventions, we have adjusted GJTs between each zone by mode. For example, to model a potential reduction in public transport fares, we reduced the GJTs for bus services across all zones in the South East.

The packages were modelled in SEELUM from a base year of 2018 and run for 32 years to 2050. The results are presented as a comparison to a "Business as Usual" Scenario, which is based on the Department for Transport's National Trip End Model (NTEM) that also projects employment and population growth to 2050.

The summary results of the modelling of all packages of interventions are presented in **Table 2**.

Estimating costs

Capital cost estimates have been prepared to a level of detail commensurate with the maturity of the design of the packages of interventions and are presented in **Table 2**. These are early stage capital cost estimates and verified estimates will be built up as scheme is further developed.

As development of all SIP interventions progresses there will be a need to incorporate Natural Capital Assessment (or similar methods) into an updated estimation of economic costs. TfSE will work with Department for Transport to follow latest guidance on assessing natural capital costs.

Items and quantities have been priced using historic project data and industry standard published data, with adjustments made to capture the influence that quantity, access, time constraints, site location and conditions will have on labour, plant and materials input costs.

A contingency has been added for minor items that have not been measured. Allowances have been made for main contractors' preliminaries and overhead and profit, temporary works and traffic management where required. Allowances for professional fees and other development costs have also been included. To reflect the maturity of the design a risk allowance has been applied.

Annual maintenance and Renewal capital cost estimates are also shown in **Table 2**.

Page 140

Table 2: Package Benefits and costs (2020 prices)

Packages of intervention*	Implementation Timeframe Short = 2020s Medium = 2030s Long = 2040s	Capital Construction Cost in £millions* (mid-cost estimate in 2020 prices)	Annual Capital Maintenance and Renewal Costs (mid-cost estimate in 2020 prices)	Gross Value Added (GVA) in £millions per annum in 2050	Additional new local residents by 2050 (Compared to Do Nothing Scenario in 2050)	Additional full time-equivalent jobs by 2050 (Compared to Do Nothing Scenario in 2050)	Change in Carbon Emissions in 2050 (Nearest 5,000 Tonnes CO_2e)	Change in average weekday return trips	Change in average weekday return car trips	Change in average weekday return rail trips	Change in average weekday return bus, mass transit and ferry trips
1. **Global Policy interventions** (see main section for further detail)	Ongoing	-	-	**720**	**-52,500**	**-1,600**	**-1.4m**	**-1.4m**	**-1.6m**	**61,000**	**252,000**
2. Solent and Sussex Coast		**11,200**	**635**	**1,250**	**6,350**	**7,900**	**-10,000**	**35,000**	**-180,000**	**45,000**	**170,000**
2.1. South Hampshire Rail (Core)	Short – Medium	600	15	285	1,050	1,550	-	5,000	-5,000	15,000	-
2.2. South Hampshire Rail (Enhanced)	Medium – Long	3,700	95	305	1,150	2,000	-	10,000	-5,000	15,000	-
2.3. South Hampshire Mass Transit	Short – Medium	1,800	135	165	1,300	1,000	-30,000	5,000	-70,000	-	110,000
2.4. South Hampshire Active Travel	Short Term	350	30	10	150	50	-10,000	-	-40,000	-	-5,000
2.5. Isle of Wight Connections	Short – Medium	250	20	165	1,950	1,500	-	5,000	-15,000	5,000	15,000
2.6. Sussex Coast Rail	Short – Medium	350	25	80	700	350	-	5,000	-	5,000	-
2.7. Sussex Coast Mass Transit	Short – Medium	450	35	120	850	550	-10,000	5,000	-35,000	5,000	55,000

2.8. Sussex Coast Active Travel	Short	250	22	5	<50	<50	-5,000	-	-20,000	-	-5,000
2.9. Solent and Sussex Coast Highways	Short – Long	3,500	260	170	250	700	45,000	5,000	5,000	-	5,000
3. London – Sussex Coast		**3,600**	**245**	**615**	**8,100**	**4,450**	**-10,000**	**40,000**	**-70,000**	**40,000**	**55,000**
3.1. London – Sussex Coast Rail	Short – Medium	500	15	375	6,250	2,350	-10,000	30,000	-10,000	45,000	-
3.2. London – Sussex Coast Mass Transit	Short – Medium	400	30	100	1,350	800	-15,000	5,000	-35,000	-	60,000
3.3. London – Sussex Coast Active Travel	Short	1,100	80	10	50	<50	-10,000	-	-35,000	-	-5,000
3.4. London – Sussex Coast Highways	Short – Long	1,600	120	140	700	1,350	20,000	5,000	5,000	-	-
4. Wessex Thames		**10,400**	**430**	**1,205**	**7,100**	**5,600**	**-60,000**	**45,000**	**-240,000**	**40,000**	**200,000**
4.1. Wessex Thames Rail	Short – Long	7,200	185	850	3,100	3,750	-5,000	35,000	-5,000	50,000	-
4.2. Wessex Thames Mass Transit	Short – Medium	1,000	80	245	3,300	1,300	-55,000	10,000	-130,000	-5,000	225,000
4.3. Wessex Thames Active Travel	Short	400	30	35	500	<50	-30,000	-	-120,000	-	-10,000
4.4. Wessex Thames Highways	Medium – Long	1,800	135	90	200	450	25,000	5,000	5,000	-	-
5. Kent, Medway, and East Sussex (KMES)		**19,400**	**865**	**750**	**28,400**	**8,400**	**30,000**	**160,000**	**-**	**65,000**	**75,000**
5.1. KMES Rail	Short – Medium	3,700	95	140	6,150	1,500	-15,000	20,000	-	15,000	-
5.2. KMES High Speed Rail East	Short – Medium	1,000	25	125	5,800	1,400	-15,000	15,000	-	15,000	-

Page 141

5.3. KMES High Speed Rail North	Medium – Long	7,300**	190	225	11,700	2,450	-15,000	35,000	-	35,000	-
5.4. KMES Mass Transit	Short – Medium	700	55	45	1,550	400	-25,000	-	-50,000	-	85,000
5.5. KMES Active Travel	Short	100	5	15	450	250	-10,000	-	-50,000	-	-5,000
5.6. Lower Thames Crossing	Medium – Long	2,800***	290	90	1,200	950	65,000	5,000	10,000	-	-
5.7. KMES Highways	Short – Long	3,800	210	105	1,600	1,400	45,000	75,000	85,000	-	-5,000

Figures rounded to nearest: £50m for Capital Cost; £5m for GVA; 50 new residents /jobs; 5,000 kilo-tonnes CO_2e; and 5,000 daily return trips

*A full list of proposed interventions within each package can be found in **Appendix A**

**Assumes High Speed Rail option goes via Chatham rather than Medway City Estate or Rochester

***Assumes assignment of 40% of Lower Thames Crossing capital costs to Kent geographically

Funding and Financing

We know that the credibility of our SIP, which is both ambitious and capital-intensive, needs to be underpinned by a pragmatic consideration of how it will be paid for.

In common with other comparable infrastructure programmes, the SIP's principal financial challenge will relate to funding – how the projects are ultimately paid for over time – both capital (for construction, maintenance and renewals) and resource (for operations). Addressing this challenge will involve both making the best use of funds directed from government, and identifying new and innovative approaches (especially those that tap into the local and regional value that the interventions will generate).

For many of the proposed interventions, financing (i.e., how and from whom the cash is raised to meet the costs of construction as they arise) will also play an important role in ensuring value-for-money delivery.

The SIP is made up of a number of diverse interventions and there is not going to be a 'one size fits all' funding and financing solution that applies across the programme. TfSE itself may not be the body that delivers or pays for these interventions. But, as an organisation, we have an important role to play in making them a reality.

This section therefore sets out the potential revenue sources that could contribute to the types of interventions identified in the SIP and the role of different stakeholders in channelling these funds to support the investment need.

Context

Traditionally, strategic connectivity interventions have been funded from a combination of user or farebox revenues and central government grant provided to delivery bodies and transport authorities (often competitively bid for and/or in scheme or one year, mode based silos).

But today, these traditional funders face a number of competing priorities, with financial positions that are in many cases highly constrained. Further national-level challenges (but also opportunities) can be expected to accompany technological change in the transport sector, particularly the electrification of the road vehicle fleet and the implications for road taxation and the way users pay to access the highways network.

The SIP reflects the changed world in which we live and work. It seeks not only to address transport connectivity and capacity issues, but to promote and maintain economic development, increase the supply of homes, support the transition to net zero and improve quality of life and social inclusion.

The Exchequer will benefit from the broader fiscal impacts this will deliver – which is one of the reasons why it will remain appropriate for taxpayer funding to support the SIP.

However, the programme will also bring significant tangible benefits for a wider range of beneficiaries across the South East, London and beyond – in terms of productivity, employment, income levels, environmental impacts, quality of place, and land and property values.

The SIP's wide reach suggests that there is a strong case for seeking a fair and proportionate contribution from this full spectrum of beneficiary groups. This requires new and innovative tools that seek to monetise a share of the specific value that projects deliver for beneficiaries and can supplement or (eventually) replace traditional central government grant and local farebox for certain types of interventions.

However, we recognise that, if they are to have maximum impact, novel approaches may require either broader (e.g., nation-wide) reform or a degree of devolution of funding powers beyond that which the South East currently enjoys – both of which are subject to political will and community acceptance.

While it is wholly appropriate to consider new approaches, and they are likely to play a role at some stage in the multi-decade programme, we will need to work hard with local and national stakeholders if such mechanisms are going to be able to make a meaningful contribution to delivering the SIP. This will include investment decisions being made in additional to existing funding in order to deliver the schemes within this plan and realise their benefits.

The SIP's funding requirement in context

Funding allocations for strategic connectivity interventions are generally provided to delivery authorities (such as Network Rail and National Highways) from consolidated government budgets that are themselves funded in the main part by general taxation and user revenues. There are additional grant programmes for other forms of transport such as mass transit, cycling and active travel, either in their own right or as part of broader funding competitions open to local authorities.

Broadly speaking, transport spending in the South East in the recent past has been roughly equivalent to its share of both national population and its GVA contribution.

The continued existence of a centralised funding regime for most types of strategic connectivity interventions suggests that many of the programmes within the SIP will continue to be funded, at least in part, from central sources – especially given the very strong case for investment in our region.

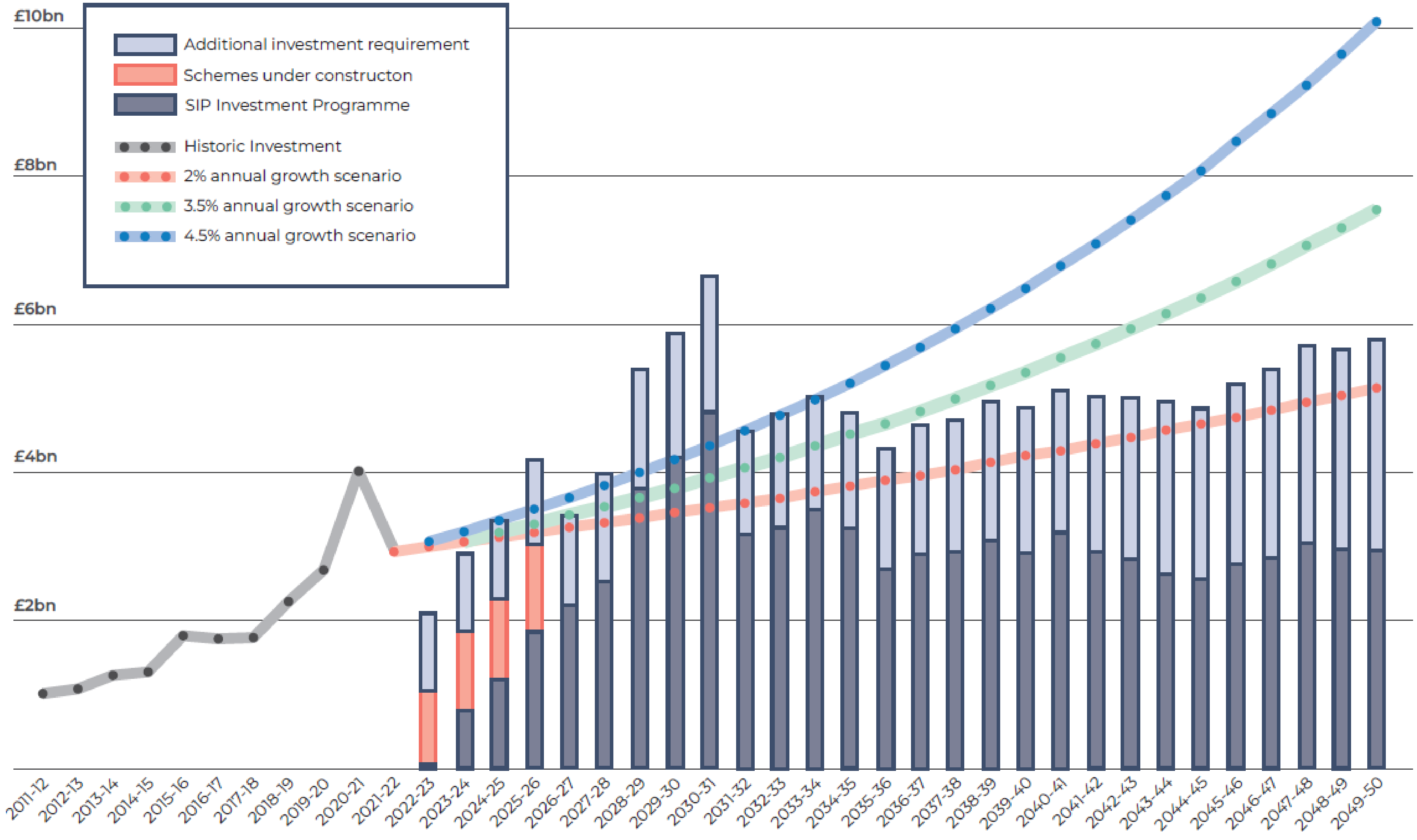
The future quantum of government funding that will be allocated to transport infrastructure (beyond current spending plans) is, of course, unknown – although historical trends can provide some indication.

Figure 9 compares the proposed future investment in transport in the South East (the SIP and assumed additional local expenditure) with illustrative future growth scenarios based on actual levels of Government spend since 2011-12. This suggests that, even if spend were to grow at a slower rate than the historic average, the majority of the overall core programme (as well as much of the indicative ancillary investment) could theoretically be supported within an illustrative envelope of potential future central funding.

More detail about how we have developed **Figure 9** is provided in a separate **Funding and Financing Technical Annex.**

[Graph from 2011 to 2050 with cumulative columns for 1) Additional investment requirement, 2) Schemes under construction, and 3) SIP Investment Programme, overlayed with lines for A) Historic investment, B) two percent annual growth scenario, C) three and a half percent annual growth scenario, and D) four and a half percent annual growth scenario]

Figure 9: Indicative investment requirement and historic and projected spend profiles



Page 145

Funding the investment programme

(1) Enhancements to existing strategic networks

Around 80% of the identified investment required in the SIP will be spent on much-needed enhancements to the existing highways and rail networks, designed to improve connectivity to, from and within our region.

Rail enhancements

Today, roughly half of the underlying government funding for rail expenditure is raised directly from passengers (fares and premia paid by rail operators) and another third from consolidated government budgets (i.e., general taxpayers). This funding is used to provide direct grant payments to Network Rail, subsidies for some operators and capital grants for other major projects.

Core funding for Network Rail is provided in five-year Control Period settlements for operations, maintenance and renewals, whereby a Statement of Funding Available (SoFA) sets a funding envelope to deliver the outputs specified in the High-Level Output Specification (HLOS). The Rail Network Enhancements Pipeline (RNEP) is a periodically updated list of enhancements that Network Rail is expected to deliver within each Control Period and is tied to Government Spending Review allocations. Interventions within the South East fall within Network Rail's Southern region.

Going forward, there may be changes to how funding is allocated and spent as a result of the Government's emerging plans to replace Network Rail with Great British Railways; however the Williams-Shapps Review states that five-year settlements will continue to be agreed with the new organisation. Accordingly, we expect the funding for most rail enhancements and renewals within the SIP to follow this pattern.

There is, however, likely to be a growing emphasis on considering ways in which non-grant funding sources can contribute to the delivery of rail enhancements – or elements of such interventions. Major interventions such as HS2 and Crossrail have shown that certain components – such as station works or rolling stock – can potentially lend themselves to alternative funding and financing arrangements.

Network Rail has also been encouraged to consider leveraging its property portfolio to support intervention delivery and to consider options for introducing private capital into its projects. As part of the 'Market-Led Proposals' initiative, private companies, local authorities and Local Enterprise Partnerships can apply for funding for rail infrastructure projects that are not identified or prioritised for Control Period funding. Market-Led Proposals which include alternative sources of funding may be more attractive to Network Rail and DfT as they help reduce the burden on the general taxpayer.

See Worked Example 1 – Crossrail – Extension from Abbey Wood to Dartford/Ebbsfleet.

Highways enhancements

Funding for SRN highways interventions is generally provided by DfT to National Highways and allocated as part of the Road Investment Strategy (RIS) process.

The underlying funding comes from consolidated government budgets (although, since 2020, the Government has committed to hypothecating revenues raised through Vehicle Excise Duty (VED) to investments in the roads network). The taxes and duties levied directly on road users significantly exceed the equivalent expenditures. In 2021, Fuel Duty raised around £25 billion, while VED accounted for around £5 billion. In the same year, overall roads expenditure in England was about £10 billion.

While we expect highways enhancements to continue to be funded via established approaches in the short term, it seems increasingly likely that these approaches will not endure for the duration of the SIP period.

As more vehicles are electrified, Fuel Duty revenues are expected to fall, and alternative methods of raising revenue will need to be found. To achieve this, expanding existing local congestion and air quality charges, tolls and/or distance-based (‘pay-per-mile’) road user charging interventions presents the opportunity to move towards an approach whereby the usage of a vehicle (rather than its ownership) provides the basis of a contribution. This would not only provide the Government with revenues for infrastructure spending, but also address other objectives such as optimising the capacity of a finite asset, managing congestion and improving air quality.

While broad national reform is being considered, it may be likelier that more cities and regions use the powers available to them to implement road user charging systems. Cities such as Cardiff, Reading and Bristol are considering congestion charging, following the lead of London and Durham.

There are indications that cities like Birmingham and Manchester will follow London’s lead in establishing Clean Air Zone (CAZ) and Low Emission Zone (LEZ) interventions, though these are subject to consultation in respect of the long-term impact of COVID-19 and the advancement of the ban on Internal Combustion Engines (ICE) vehicles.

TfSE intends to play an important role in working with the government and other stakeholders on developing potential future options for road user charging. This includes influencing the direction of any national reform, supporting local partners in developing solutions for specific geographies, and more broadly ensuring that revenues from any future interventions can be efficiently and equitably applied to support priority capital interventions in the South East.

See A34 Junction and Safety Enhancements Worked Example 2.

(2) New strategic infrastructure

Major new infrastructure projects that deliver transformational connectivity enhancements are often funded via bespoke arrangements outside of the established approaches. HS2, for example, will be almost fully funded by Government outside of the normal Network Rail Control Period settlement.

For some new infrastructure (such as a bridge or tunnel) on an existing network, part of the funding package can involve seeking to recoup some of the costs from users. When it opens, the Silvertown Tunnel will have a free-flow charging system (which will also apply on the Blackwall Tunnel), for example. The Dartford Crossing, M6 Toll, Mersey Gateway and Humber Bridge are further examples of this approach. Tolls are appropriate in these situations as there is a tangible gain to users for which they are prepared to pay.

A further feature of user charges is that the prospect of a relatively-predictable (and therefore 'bankable') revenue stream can – in certain circumstances – introduce the potential to consider a range of procurement and financing structures (public and private), to both bridge the timing gap between construction expenditure and the realisation of their benefits, and to share some of the risks of delivery and operation.

There is generally no shortage of finance available for investment in such interventions, with government-backed sources such as the Public Works Loans Board (PWLB) and the new Infrastructure Bank, as well as strong market appetite for private capital and concession or availability procurement models.

We anticipate that user charging will be a consideration for a variety of interventions included in the SIP where the conditions are appropriate to do so. We will work with intervention developers to consider the wide range of options.

See A27 Worthing (Long Term Solution) Worked Example 3.

(3) Local and mass transit

Funding for local transport and urban mass transit solutions is generally very context-specific and accordingly does not fit within established modal regulatory funding settlements. The guided busway system in Cambridge, for example, was paid for by a combination of Government grant, local developer charges and operator contributions.

Mass transit interventions are good examples of where TfSE can support its stakeholders in identifying and developing funding and financing solutions that reduce the call on traditional sources.

There are some tools already available in local settings to monetise and capture project-specific benefits – but they are relatively limited, because they account for a small proportion of the total value that is created, and only rarely deliver this back to delivery bodies, especially at the local level.

In recent years there has been a growing recognition of the need for new approaches that seek to more efficiently and 'smartly' monetise a share of the benefits that projects deliver for a wider range of beneficiary groups other than just national taxpayers and passengers. These mechanisms seek to align the funding of projects with the value that they create, in a way that the standard tax system does not, while simultaneously reducing the call on conventional budget funding.

Examples include:

- The Greater Manchester Transport Fund – including the expansion of Metrolink – is part-funded by a **Council Tax levy** that monetises a share of benefits to residents.
- Crossrail is part-funded by the London **Business Rate Supplement** that monetises a share of benefits to businesses, and by the **Mayoral Community Infrastructure Levy (CIL)** that monetises a share of benefits to property developers.
- The Northern Line Extension is part-funded by **developer contributions** intervention and an **Enterprise Zone**, as well as by **incremental business rate receipts** received by two London boroughs.
- In Nottingham, a **Workplace Parking Levy** raises funds for the local authority to contribute towards financing a new tram system and redevelopment of the conventional rail station.

Each of the mechanisms above is very context specific. Many are currently only available to established political geographies (such as Mayoral Combined Authorities) which have access to devolved funding powers. They therefore are not currently available in the South East.

However, over the course of the SIP's multi-decade investment horizon, and as the devolution agenda continues to evolve (for example with the establishment of new Mayoral Combined Authorities and 'county deals'), it is conceivable – and indeed may be necessary – that innovative new funding mechanisms will form part of future funding deals for major transport interventions.

Mechanisms that may play such a role in the future delivery of the SIP include:

- The diversion of **incremental revenues from existing taxes or charges** in specified locations, e.g., the CIL, business rates, Council Tax or Stamp Duty.
- **Increased rates, or other enhancements, to existing taxes and charges** such as a Council Tax precept, business rates supplement or a supplementary CIL.
- **New local charging mechanisms**, such as a betterment levy or 'transport premium charge' (TPC), or land pooling or sharing the proceeds of development rights.

There is also an opportunity to look at funding reform beyond the prism of specific interventions or modes. For example, there is a growing trend for broader 'growth deals' with government whereby a package of investments is agreed that might stretch beyond transport to, for example, housing delivery, and in return unlock either matched funding and/or access to wider revenue-raising powers at a local level.

See South East Hampshire Rapid Transit Worked Example 4.

(4) Active travel infrastructure

Strategic and local active travel (walking, wheeling and cycling) infrastructure is different to other types of transport infrastructure in that:

- it is effectively free to use;
- does not involve user contributions;
- presents significant public health, individual wellbeing, and equality benefits;
- can be cost-effectively delivered in the short term; and
- can reduce or even remove the need for more expensive highways capacity improvements.

Active travel infrastructure is generally delivered and paid for by local authorities (although there are some exceptions such as National Highways' designated Cycling, Safety and Integration Fund). Local authorities are encouraged to develop Local Cycling and Walking Infrastructure Plans (LCWIPs) to coordinate the delivery of active travel programmes.

To deliver this infrastructure, local authorities can use their core discretionary sources of revenue, with a particular role for developer contributions from CIL and Section 106 agreements where the infrastructure in question supports wider development programmes.

More commonly, local authorities bid into government grant programmes to help fund active travel. There have been dedicated programmes such as the Active Travel Fund, Places to Ride Programme, Bikeability programme and Cycle Ambition Cities Programme. Additionally, bids are made into programmes with broader transport or regeneration objectives. The Local Growth Fund, Stronger Towns Fund, the Levelling up Fund, the Future High Streets Fund, the Transforming Cities Fund and Housing Infrastructure Fund have all been used to support active travel and cycling.

Going forward, the Government has committed to streamlining the process for accessing funding for active travel infrastructure as part of the 'Gear Change' strategy. In January 2022, a new executive agency of the DfT, Active Travel England (ATE), was established to – amongst other things – coordinate £2bn of new government funding in this area.

While the quantum of available funding may change, as will the way it is distributed, the Government's new strategy is clear that responsibility for delivery will remain with local authorities. TfSE's role in promoting active travel and cycling interventions will be to support local authorities engaging in this process. Additionally, to the extent that interventions and networks cross local political boundaries, there is a role coordinating between local authorities.

See the Avenue Verte Worked Example 5.

(5) Ports and maritime

In the UK, the majority of ports and shipping operations (although not all) are provided by private enterprises, with little public sector financial support.

One such exception to this are where services provide a 'lifeline' (i.e., transporting fresh food), such as the Hebridean ferry service in Scotland which has public ownership of vessels as a protection against operator failure.

Commercially viable ferry services, such as from mainland England to the Isle of Wight, are privately run. Fares, as well as service frequency and quality, are generally determined by the ferry operator, and based on commercial viability rather than regulatory requirements. Improvements to such services, including the delivery of new assets such as quays or shops, is therefore a private matter.

See Isle of Wight Ferry Service Enhancements Worked Example 6.

WORKED EXAMPLE 1: Crossrail – Extension from Abbey Wood to Dartford/Ebbsfleet

Package: Kent, Medway and East Sussex - Classic Rail Package

The opening of the Elizabeth Line (Crossrail) will provide fast, frequent services into central London and Heathrow from a number of locations to the east and west of London. Despite earlier variations of the scheme proposing a longer alignment, services in the south east will terminate at Abbey Wood in the London Borough of Bexley.

In 2016, the Crossrail to Ebbsfleet (C2E) Partnership was formed as an informal group of local authorities and transport agencies to promote options for the corridor east of Abbey Wood into Kent, to make the most of new Elizabeth Line services, as well as supporting the delivery of new homes and jobs.

Following a detailed study of a range of options using £4.85m of funding from the Department for Levelling-up, Housing and Communities (DLUHC) in 2021 a Strategic Outline Business Case was submitted to Government setting out three preferred schemes to support ambitious and sustainable housing growth and regeneration in the Bexley Riverside – North Kent corridor.

Of the three options being considered as part of the study, two involve enhancing the Elizabeth Line to provide more direct rail services from London to Ebbsfleet, Northfleet and Gravesend. In each case, some sections of additional track would need to be built, in addition to junction works, enhancement of existing stations and building new stabling facilities.

The Department for Levelling-up, Housing and Communities and the Department for Transport are currently considering the Business Case.

For the purposes of the SIP, a cost of £2.6bn to £3.2bn is assumed for this package of schemes, to be delivered between 2023 and 2028, although we note there are a range of different options under consideration in the Business Case, some of which may involve a higher cost.

Funding and financing options

The proposal, at SOBC stage, has identified three potential delivery leads ranging from TfL, Network Rail (or Great British Railways in future) to a Special Purpose Vehicle (which would be a blend of the former two options with private sector input). The different approaches have different strengths and weaknesses and would be developed if the scheme case is developed to Outline and Full Business Case stages.

Were Great British Railways to be the delivery body (recognising that much of the works are on the existing north Kent Line), then DfT will need to accept the project into the **Rail Network Enhancements Pipeline (RNEP)** and the project will then progress through RNEP's five stages before government funding will be committed.

As a major, complex (and capital-intensive) cross-border scheme with wide-ranging potential benefits, a wide range of funding sources could play a role beyond central Government grant funding for the railways, as part of a bespoke package.

This might include Government funding from **broader programmes** that recognise the potential of the scheme to contribute to national housing, economic and environmental objectives (e.g., the Housing Infrastructure Fund or successor programme). It is notable that the Department for Levelling Up, Communities & Housing was the key sponsoring department for the recent Abbey Wood to Ebbsfleet Connectivity Study.

A **contribution from London** (the Mayor, GLA and TfL) could also be considered, as the scheme features in the Mayor’s Transport Plan - recognising its cross-border geography and the potential to catalyse economic growth in London. While the Mayor and the GLA have certain revenue-raising powers available to them (as seen with the implementation of a Mayoral CIL and business rate supplement to support Crossrail), agreement to extend these and divert them to the scheme will be required, and this would be challenging in the context of TfL's difficult financial situation and the additional time and funds required to deliver the Elizabeth Line itself.

Potential mechanisms for a **local contribution** from the C2E Partnership authorities (linked to the growth unlocked by the scheme) have been identified as part of the recent study. These include existing budgets and tools, as well as new/innovative approaches to capturing the value of development and the expected uplift in nearby land values. Such mechanisms may have a role to play but would present significant challenges of political and community acceptability and equity – and some are likely to require broader (e.g., national) reform to be successful.

WORKED EXAMPLE 2: A34 Junction and Safety Enhancements

Wessex Thames - Highways Package

The A34 is a major highway running for over 150 miles from the A33 and M3 at Winchester in Hampshire, to the A6 and A6042 in Salford, Greater Manchester, with the Strategic Road Network element running from M3 at Winchester to the M40 just north of Oxford. It forms a large part of the major trunk route from Southampton, via Oxford, to Birmingham, the Potteries and Manchester.

Alongside the M3 and M4, the A34 is a significant corridor upon on which the Wessex Thames area is dependent for passenger and freight movements.

This is a major route upgrade comprised of a series of improvements to lanes, slip roads and junctions to improve traffic flow, and enhance safety on the A34 within the TfSE geography. The package of schemes includes climbing lanes for larger vehicles on hills, remodelling of the A34/A303 junctions and capacity enhancements of A34/M3 junction.

For the purposes of the SIP, a cost of around £800m is assumed for this package of schemes, to be delivered between 2029 and 2033. It is a project developed in collaboration with National Highways and TfSE and will be included within emerging Route Strategy documents.

Funding and financing options

Although a relatively large package of interventions in terms of cost and geographic coverage, the individual upgrades themselves are considered to be relatively small-scale, ‘standard’ and may in practice be delivered incrementally rather than in one go. Some may require bespoke delivery models (e.g., where new climbing lanes required third party land).

As an SRN scheme, there is no reason to suggest that the programme of works would be delivered other than as part of existing arrangements through the National Highways’ **Roads Investment Strategy**. This would of course require National Highways and the Government to prioritise the scheme, and TfSE can support this outcome.

The sources of the underlying funding for the Roads Investment Strategy are expected to change over time, as revenue from conventional roads taxes reduces and is replaced, potentially, with income from new user charging regimes. Our working assumption is that whatever the mechanism for raising this underlying revenue from road users, the proceeds will continue to be reinvested – at least in part – in the highways networks.

Alternative delivery models have in the past had a role to play in highways schemes. **Design, Build, Finance and Operate (DBFO)** is a prominent example of this and involves entering a contractual arrangement (concession) with a private entity to operate and maintain a specified route for (usually) 30 years, as well as deliver a programme of enhancements. The enhancement works are financed by the concessionaire, who is then repaid via a fee over the length of the contract period (linked to performance and/or road usage).

DBFOs and other variations (e.g., Design, Build, Finance and Maintain, Public Finance Initiative) are no longer within government policy for centrally-funded infrastructure projects, and therefore unlikely to be deployed on schemes such as the A34 programme.

Local authorities are able to use private finance models; however, they are typically only appropriate where there is an objective to outsource long-term operations and maintenance, as capital elements are often more cost effectively financed from conventional PWLB borrowing.

WORKED EXAMPLE 3: A27 Long Term Worthing Solution

Solent and Sussex Coast – South Coast Highways Package

The A27 through Worthing and Lancing is used for local journeys but is also an important route for long-distance traffic.

Despite some improvements along the route in recent years, there are many long-standing challenges around capacity, delays, journey time and reliability, safety and environment.

As a result of these difficulties, traffic diverts away from the A27 to alternative routes that are less suited to high volumes. Additionally, bus and active travel journeys are held up by congestion in Worthing.

A number of options for the corridor have been put forward, and National Highways plans to hold a public consultation on their Online Improvement option later in 2022.

One of the potential “long-term” solutions is the construction of a new stretch of road, much of which would be within a four to five kilometre tunnel, potentially making it the longest road tunnel in the UK. It should be noted that this is not currently in National Highways’ policy or plans for the area.

For the purposes of the SIP, a cost of around £2 billion is assumed for this package of schemes, to be delivered between 2045 and 2050, although this figure may vary as it is highly dependent on detailed design, especially if the solution were to involve a tunnel which would have options for different lengths and configuration (e.g., single or multiple bore).

Funding and financing options

As an SRN scheme, the government-funded National Highways’ **Roads Investment Strategy** would be the ‘default’ funding source for the scheme. However, new pieces of infrastructure such as tunnels or bridges that have a transformational impact on connectivity can be suitable for consideration of discrete user charges in the form of **tolls** though this would be subject to results of financial feasibility studies at a stage when the project is more progressed..

To prevent unintended traffic movements, in some cases existing crossings as well as new ones are tolled. In relation to the Mersey Gateway, for example, both the new bridge and the existing Silver Jubilee Bridge are tolled and in relation to the Silvertown Tunnel both the new tunnel and the existing Blackwall Tunnel will be tolled.

The future value of the tolls can be used by the authority to finance borrowing (e.g., from the PWLB) to fund construction activity. Alternatively, a privately-financed construction or construction plus operations/ maintenance (e.g., a PPP or DBFM) can be let, with the toll revenues used to pay the contractor. This model is used for both the Mersey Gateway and Silvertown Tunnel, where the toll revenues are or will be used to help meet the contractual payments to the special purpose vehicle responsible for the design, build, finance, operations/ maintenance of the new crossing.

The public sector (government department or statutory transport authority) will normally remain the party with the legal power to levy a toll and the responsibility for setting the price. Revenue and demand risk in relation to tolling remains with the public sector.

On the Mersey Gateway, the responsibility for physically collecting the toll revenue has been transferred to the SPV operating the crossing, which acts as the agent of the local authority in collecting the tolls. On Silvertown Tunnel the responsibility for collecting the tolls is through a separate contract, and the SPV is only required to provide ‘passive’ infrastructure (i.e., the gantries for the cameras).

It is potentially possible to pass demand risk to the private sector under a concession model, but generally for a new crossing the market is not willing to take this risk without impacting value for money.

WORKED EXAMPLE 4: South East Hampshire Rapid Transit

Solent and Sussex Coast - South Hampshire Mass Transit Package

The South East Hampshire Rapid Transit network is a series of interventions aimed at making public transport more accessible, efficient and popular in Portsmouth and the surrounding area.

It includes the Eclipse Bus Rapid Transit (BRT) system which currently runs on 4.5km of dedicated track between areas in Gosport and Fareham, as well as lanes that are dedicated to buses, and technology which gives priority to buses at junctions.

There is an ambition to expand Eclipse / a BRT system from Gosport to Fareham, Welborne and Portsmouth. Based on analysis undertaken by the authority in 2018-19, it was hoped that the South East Hampshire Rapid Transit network would eventually serve 14 large development sites which will together deliver 17,750 new homes and 306,000 sqm of employment floor space – comprising 42% of new dwellings and over 72% of new employment floor space in the Portsmouth city region to 2036.

Following consultation with local stakeholders, the SIP includes works associated with the following corridors: City Centre – Havant, City Centre – Waterlooville, City Centre – Fareham, Fareham – Gosport, Havant – Waterlooville, Fareham – Welborne and Fareham – Whiteley.

For the purposes of the SIP, a cost of around £500m is assumed for this package of schemes, to be delivered between 2030 and 2032.

Funding and financing options

The scheme provides a good example of the way in which **bespoke funding packages** are often developed to support local and mass transit projects.

The first phase of the Eclipse BRT route received funding in 2012 from central government (£20m through the Community Infrastructure Fund), Hampshire County Council (around £4m) supported by Local Transport Plan grants, and developer contributions (around £0.5m). Additionally, the operator, First Group, invested £2.8m in new vehicles and marketing.

An extension to the Eclipse network in 2021 followed a similar pattern. It was funded by £6.93m from DfT's National Productivity Investment Fund, £1.4m from the Transforming Cities Fund and £3.27m from Hampshire County Council. In addition, First Bus has committed to investing £3.8m in a new bus fleet.

Future extensions will likely follow a similar pattern of joint funding by various partners. **Local authorities** will have a key role to play, recognising the localised nature of much of the benefit generated; however, their capacity to contribute will continue to be constrained by the revenue-raising powers that are available to them. From a **private sector** perspective, the performance of the existing network suggests that there may be further future operating surpluses – although the relative contribution of this will be subject to both commercial arrangements and future patronage levels.

Certain **ancillary revenues** may, in certain circumstances, play a role in a bespoke package for the scheme. These include Over-Site Development (OSD) and other real estate opportunities at stops and termini, depending on the ownership of the land in question. Commercial and retail income (e.g., kiosks at stops and termini) may also contribute but are likely to be relatively modest in terms of overall costs. Other options could include offering EV charging points if synergies with the BRT infrastructure allow these to be delivered cost effectively.

WORKED EXAMPLE 5: Avenue Verte

London - Sussex Coast – Active Travel Package

The Avenue Verte is a 247-mile cycle and walking route starting at the London Eye in London and ending at Notre Dame in Paris, passing through Surrey, West Sussex and East Sussex and crossing the Channel via the Newhaven – Dieppe ferry.

The route is a mixture of on-road, mainly quiet lanes, and traffic-free stretches on old railway paths and riverside routes.

The scheme envisaged in the SIP would involve a series of enhancements and extensions to the network by way of wayfinding across minor roads, safety interventions at junctions, some new cycleways where the route runs on busier highways, and potentially the conversion of part a disused railway.

For the purposes of the SIP, a cost of around £70m is assumed for this scheme, to be delivered in the 2030s.

Funding and financing options

Historically, cycling and walking infrastructure has been delivered and paid for by **local authorities**. In some cases, local authorities have been able to part fund investments in active travel by successfully bidding into government grant programmes, some of which (such as National Highways' designated Cycling, Safety and Integration Fund) have been specifically designed for this purpose.

With large-scale and cross-border schemes such as the Avenue Verte, while we expect responsibility to remain with local authorities, there may be opportunities to consider alternative approaches.

Firstly, the Government has committed to streamlining the process for accessing funding for active travel infrastructure as part of the "Gear Change" strategy. In January 2022, a new executive agency of the DfT, **Active Travel England (ATE)**, was established to – amongst other things – coordinate £2bn of new government funding in this area. This reflects a growing emphasis on active travel as a means of improving health and wellbeing outcomes and supporting the decarbonisation of transport and may lead to a different approach to the provision of funds for local areas.

Secondly, in common with other forms of locally-delivered transport, the funding options available to local areas may expand as a result of future **devolution of revenue-raising powers** and decision-making responsibility.

Finally, although active travel is unlikely to be appropriate for user charges, there are **innovative options** that could be considered such as the potential opportunity to lay ducting along cycleways which could be used for fibre or other utilities. Liverpool has a "Dig Once" programme which does exactly that, supported by a joint venture for fibre.

WORKED EXAMPLE 6: Isle of Wight ferries

Solent and Sussex Coast – Isle of Wight Package

The Isle of Wight is served by three main ferry operations: Red Funnel, Wightlink and Hovertravel. Although there is some competition between operators, in practice this is limited.

During the pandemic, parts of the UK's competition laws were suspended to allow the ferry companies to work together to maintain minimum service levels. This was revoked in 2021.

The scheme envisaged in the SIP includes increased frequency and longer operating hours on existing routes, a new route between Ryde and Southampton (requiring three or four vessels) and improved integration with public transport networks on both the island and the mainland.

It is assumed there will be no requirement for new port infrastructure.

For the purposes of the SIP, no costs have been accounted for as it is assumed any investment will be privately sourced. This is based on the assumption that the current non-regulated and non-subsidised commercial market will continue to operate.

Funding and financing options

The ferry companies serving the Isle of Wight are private for-profit entities operating in a **non-regulated, commercial market**, with no oversight from government (e.g., Public Service Obligation), central or local.

No subsidy is provided, and only in particular circumstances does government provide support, such as during the Covid pandemic and as part of the 2021 Maritime Accessibility Fund (from which both Wightlink and Red Funnel were awarded around £300k to make upgrades to the accessibility of their services).

In 2009, the Office of Fair Trading concluded that under this non-regulated framework, operators deliver "a fairly comprehensive, year-round service" and more recent government pronouncements have indicated that this arrangement is unlikely to change.

Although revenue support (and some form of service obligation) may be implemented in the future, it is assumed at this stage that no public funding will be provided to support the addition of new services. On the basis that services are commercially viable with higher demand, it is assumed that the costs of increasing frequencies would therefore be **recovered by the operators through fares**.

If new ferries were to be required to meet the increase in service patterns, the costs of doing so (either purchased outright or using lease arrangements) would also be **borne by the operator**. For example, when Red Funnel commissioned a new Ro-Ro freight ferry from the UK shipbuilder Cammell Laird in Birkenhead (designed to provide additional year-round freight capacity for the Southampton-East Cowes route which handles 53% of all freight movements across the Solent), the ship, at a cost of £10m, was financed by the company.

TfSE's role in supporting the 'funding journey'

In the absence of a major restructuring of TfSE into a delivery body with revenue raising and borrowing powers, it is highly likely that financing and risk management will continue to be for other parties, including DfT, Great British Railways and National Highways, to manage (either directly or via private finance and related mechanisms). The way we will interact with these key stakeholders is set out in the next chapter.

In particular, we are open to exploring ways in which TfSE can support funding and financing solutions – especially in terms of:

- developing business cases;
- assessing the broad spectrum of procurement routes (including those that lend themselves to private finance);
- helping identify and secure a broad range of funding sources for interventions (including thinking creatively about commercial revenues, user charges and new value-capture charging mechanisms); and
- supporting the efficient and accountable flow of funds to the interventions for which they are required.

While TfSE's working hypothesis is that established and conventional funding and financing solutions will be the most common avenue for paying for the interventions we have identified (at least in the earlier phases of the programme), this does not always have to be the case.

The reliance on conventional sources is driven not by lack of ambition, but by the fact that neither TfSE, nor the local authorities and transport authorities we speak for, have many alternative options available to us.

While we accept that devolution is a highly-complex matter, the fact of the matter is that places such as London and Greater Manchester, which have greater freedom to raise revenue locally, are in a position to deliver more ambitious programmes of transport investments, and to drive their own strategic direction in terms of how and where the funds are spent.

The history of devolution in the UK has demonstrated that the more funding levers that are provided to local places, the more capacity there can be to move away from user funding and grant and towards a genuine beneficiary-led approach.

This includes tapping into windfall gains for developers, landowners and businesses – for example through mechanisms such as strategic infrastructure tariffs, business rates supplements and council tax precepts (all of which are available to authorities in the UK with the greatest levels of funding and decision making devolution).

We recognise that with funding responsibility come challenges and risk. Places which have been given funding powers still need to take their communities along with them on the journey – as seen with the congestion charging proposal in Greater Manchester rejected in a referendum, or the difficulties in progressing future business rates supplements presented by the requirement for a ballot of affected businesses.

Furthermore, moving towards a genuine beneficiary-led approach needs to recognise that (regardless of the level of devolution) different interventions and different places have different degrees of potential for local value generation (and capture), and there will also be important differences between them at any one time and over time. The type or location of an intervention can determine the potential level of local contribution and potential requirement for funding from central government.

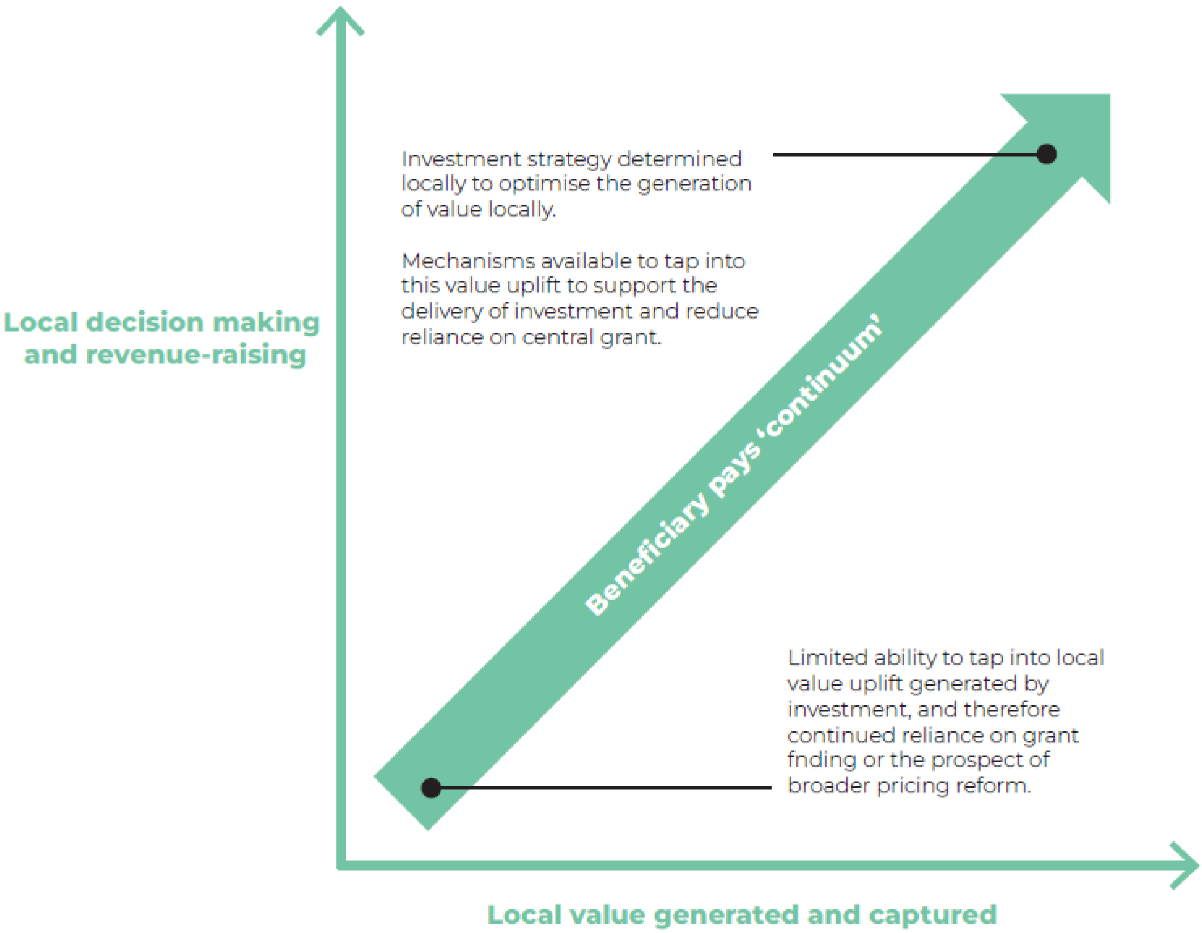
For example, urban mass transit interventions in London and other major cities can potentially deliver the best against this objective owing to strong and resilient property values that respond to connectivity enhancements, local control of public transport fareboxes, devolved funding powers and the strength and size of the local economy. In places where the potential to generate value uplift is more limited (e.g., where land values are low or because the powers available to generate revenue are limited), funding reform may not be suitable and the solution will instead require continued grant funding or, potentially, leveraging alternative user pricing mechanisms.

TfSE's SIP, which has at its heart broad socio-economic and environmental objectives in addition to improving access and connectivity, can be considered relatively 'low down' the continuum shown in **Figure 10** due to the devolution situation, with progress potentially slow and therefore possibly dependent on broader transport pricing reforms. While we believe our programme will generate significant local value uplift, the means of leveraging it are scarce.

The challenges of moving up that continuum are complex, but TfSE would welcome a dialogue with Government around options for the future, because the potential prize is reduced reliance on centrally-derived funding, which we suspect is desirable for all.

While we want to optimise the role of a beneficiary-led approach within the South East, the approach needs to be consistent with funding strategies that are being developed for programmes elsewhere in the UK in the interest of having demonstrable fairness between places and regions. We look forward to working with our partners, including other Sub-national Transport Bodies, to make this a reality.

Figure 10: Beneficiary Pays 'Continuum'



[Illustrative graph of the increasing "Beneficiary pays continuum" with an x-axis label of "Local value generated and captured" and a y-axis of "Local decision making and revenue raising", with a note at the top stating that "Investment strategy determined locally to optimise the generation of value locally. Mechanisms available to tap into this value uplift to support the delivery of investment and reduce reliance on central grant." A future note at the bottom right states "Limited ability to tap into local value uplift generated by investment, and therefore continued reliance on grant funding or the prospect of broader pricing reform]

Delivery

TfSE will work closely with partners to deliver the packages of interventions and will involve defining:

- roles and responsibilities;
- timing and phasing;
- governance;
- stakeholder engagement; and
- monitoring and evaluation.

Roles and Responsibilities

No single organisation will be solely responsible for delivering this plan – its delivery is very much a shared endeavour. A summary of the key agencies we expect to be involved is presented in **Table 3** and is summarised by organisation below.

Transport for the South East

TfSE's role will reflect its current and likely future status as an established Sub-national Transport Body for South East England. In the short- to medium-term, it is assumed there will be no significant change in the current distribution of powers, funding mechanisms and democratic accountability in South East England at a local level.

TfSE's role will, therefore, focus on:

- further strategy development, including a refresh of the Transport Strategy and Strategic Investment Plan every five years or sooner;
- programme management including scheme prioritisation, government and stakeholder engagement and monitoring and evaluation;
- joint scheme promotion;
- pre-feasibility work and funding for relevant scheme promoters, likely delivery partners and other key stakeholders;
- onward business case and scheme development and support, including use of and providing access to TfSE's emerging analytical framework;
- advocacy and securing funding; and
- procurement and sourcing of supply chains for development / planning and construction / operations staff resource and resource funding to support the above as well as build capacity and capability within scheme promoters' own organisations.

Through building consensus and capacity to deliver its transport strategy through others, TfSE will tailor its approach to the mode, scale and level of development of each prioritised intervention.

Central Government

Central Government will play a significant role in delivering many of the packages of interventions in this plan. This includes the Department for Transport, but also other government departments and their agencies and arm's length bodies. Their role will include:

- setting national policy for existential and wide ranging topics including climate change and new technology regulation;
- setting investment and business case development frameworks to guide the planning and delivery of interventions;
- guiding the development and delivery of nationally significant infrastructure and networks (e.g. through setting National Policy Statements);
- regulating the transport system (including economic and safety regulation); and
- in some cases, funding interventions.

Network Rail and Great British Railways

The British rail industry is currently undergoing one of the most significant periods of structural reform of the last three decades.

In the immediate future, it is assumed that the Department for Transport will continue to outline the strategy for the rail network, Network Rail will continue in its role as infrastructure manager for the rail network, and that train operating companies will continue to deliver passenger rail services.

However, in the medium term, we expect Network Rail's strategic and planning functions (along with other industry functions) will merge into a new government agency Great British Railways.

This new agency will lead the future development of the rail network in Great Britain and specify future infrastructure and service needs. It will also manage most passenger rail services in the South East through new passenger service contracts.

Great British Railways will therefore be one of TfSE's most important partners in delivering its vision for the South East's rail network.

National Highways

As the custodian of the English Strategic Road Network, National Highways will lead the development and delivery of interventions on this network. It will also support interventions where the Strategic Road Network (SRN) interfaces with Local Transport Authority highways.

National Highways will utilise its internal project control framework to develop the business case for highways interventions. Funding will be allocated through the Road Investment Strategy (RIS) and delivered through the Road Investment Programme (RIP). At the time of writing, in the South East, a small number of major schemes are expected to be delivered in RIS2 (2020-25), and some are being considered for RIS3 (2026-30). Some interventions are expected to be delivered beyond 2030 (e.g. Lower Thames Crossing).

TfSE will work closely with National Highways – who are members of the TfSE Partnership Board – to shape the development of Route Strategies and Road Investment Strategies and Programmes to help deliver the strategic highways interventions included in this plan.

Local Transport Authorities

Local Transport Authorities have a very significant role to play in delivering this plan. They are the custodians of their own highways networks, sponsors (in some cases, owners) of many public transport services and can fulfil the role of sponsors for major interventions in their areas. Outside the South East, there are examples of Local Transport Authorities that own and operate tramways.

To support the delivery of this plan, Local Transport Authorities will:

- sponsor and deliver highways interventions on their networks – including bus and active travel interventions;
- sponsor and deliver other transport interventions (e.g. bus interchanges);
- sponsor, and potentially operate public transport services in their areas;
- align spatial planning and public services with transport planning to ensure development is joined-up and efficient.

TfSE will work very closely with Local Transport Authorities to ensure the SIP and priorities for their areas are realised and that they are supported in recovering public transport provision to pre-pandemic level – where reasonable.

Local Planning Authorities

In areas of the South East served by two-tier local government, Local Planning Authorities (Districts and Boroughs) will lead on spatial planning and will set Local Plans for their areas. These plans will shape future TfSE priorities and this plan will also inform the development of future Local plans.

Private sector and third parties

Private sector partners and third parties provide important assets, operations, funding and insights; as well as being key planning and delivery partners. Roles include:

- Land and other asset owners and developers may deliver infrastructure and services identified, or provide funding contributions towards their delivery.
- For the public transport network, typically the private sector operate rail, mass transit, bus and other shared mobility services, subject to local conditions and national legislation and regulation.
- The delivery of interventions, including the renewal and maintenance, typically relies on the private sector or non-governmental organisations (e.g. Sustrans), given resource constraints in the public sector and the potential to access a breadth and depth of experience, skills and knowledge that could not exist in any one organisation.
- Furthermore, private-sector led bodies, ranging from Local Enterprise Partnerships to Higher Education Institutions, to think tanks, all have a role in providing skills, knowledge and insights into “what works” – these organisations are integral to planning and helping to make the case for investment and change.

Table 3: Roles and Responsibilities

Intervention	Lead Authority	TfSE Role
Global package - lower public transport fares	• Central Government (e.g., Department for Transport) / Local Authorities	• Stakeholder engagement • Pre-feasibility work and funding for relevant scheme promoters, likely delivery partners and other key stakeholders • Business case development and support, including use of and providing access to TfSE's emerging analytical framework • Advocacy and securing funding
Global package – active travel (e.g., delivery of LCWIPs, trends in micro-mobility, wider behavioural change programmes)	• Local Transport Authorities	• Pre-feasibility work and funding for relevant scheme promoters, likely delivery partners and other key stakeholders • Business case and scheme development and support, including use of and providing access to TfSE's emerging analytical framework • Advocacy and securing funding
Global package – national road user charging	• Central Government (e.g., Department for Transport)	• Further strategy development • Stakeholder engagement • Pre-feasibility work • Advocacy
Global package – integrated spatial and transport planning	• Central Government (e.g., Department for Transport and Department for Levelling up,	• Stakeholder engagement • Pre-feasibility work

	Housing and Communities) / Local Transport Authorities / Local Planning Authorities	• Use of TfSE's emerging analytical framework • Advocacy
Global package – digital technology and use of remote working and virtual access to services	• Central Government (e.g., Department for Transport and Department for Culture, Media, Sports and Digital) / Local Authorities / Private Sector	• Further strategy development • Stakeholder engagement • Pre-feasibility work • Business case development and support • Advocacy and securing funding
Global package – decarbonisation: faster adoption and regulation for zero emission vehicles and supporting infrastructure	• Central Government (e.g., Department for Transport and Department for Business, Environment and Industrial Strategy) / Local Authorities / Private Sector	• Further strategy development • Stakeholder engagement • Pre-feasibility work • Business case and scheme development and support, including use of and providing access to TfSE's emerging analytical framework • Advocacy and securing funding

Intervention	Lead Authority	TfSE Role
Passenger rail services that can be introduced without new infrastructure, but which will likely require government support and/or capacity allocation within a passenger service contract (or franchise)	• Today: Department for Transport • Future: Great British Railways	• Stakeholder engagement between Central Government, operators and local partners • Business case development, including use of and providing access to TfSE's emerging analytical framework • Advocacy and securing funding
Passenger rail services that can be introduced without new infrastructure, and without central government intervention (e.g., more international services to Mainland Europe, more freight services)	• Open Access Operators	• Stakeholder engagement with operators, local partners and Central Government • Use of and providing access to TfSE's emerging analytical framework • Advocacy
	Schemes under development	
For passenger or freight rail services requiring new infrastructure (e.g., high speed services to Hastings)	• Department for Transport (very large projects e.g., Crossrail) • Network Rail (most schemes e.g., Croydon Area Remodelling) • Local Transport Authorities (smaller schemes e.g., Housing Infrastructure Fund)	• Stakeholder engagement with Central Government and local partners • Business case and scheme development and support, including use of and providing access to TfSE's emerging analytical framework if at an earlier stage of development • Advocacy and securing funding

Intervention	Lead Authority	TfSE Role
	Schemes not currently under development	
	• Likely Network Rail and, later on, Great British Railways • TfSE could be a joint scheme promoter	• Stakeholder engagement with Central Government and local partners • Pre-feasibility work • Business case and scheme development and support, including use of and providing access to TfSE's emerging analytical framework • Advocacy and securing funding
Mass transit services that can be introduced without new infrastructure, but which will likely require local government support	• Local Authority • TfSE could be a joint scheme promoter	• Programme management, including stakeholder engagement with local partners and operators • Pre-feasibility work • Potential joint scheme promotion • Business case and scheme development and support, including use of and providing access to TfSE's emerging analytical framework • Advocacy and securing funding
Mass transit services that can be introduced without new infrastructure, and without central government	• Local Authority	• Programme management, including stakeholder engagement with local partners and operators

Intervention	Lead Authority	TfSE Role
intervention (e.g., more Fastrack services)	• TfSE could be a joint scheme promoter	• Potential joint scheme promotion • Business case and scheme development and support, including use of and providing access to TfSE's emerging analytical framework • Advocacy and securing funding
Mass transit services requiring new infrastructure (e.g., the larger mass transit interventions/networks proposed in the South East)	**Schemes under development**	
	• Local Transport Authorities	• Stakeholder engagement with local partners and Central Government • Business case and scheme development and support, including use of and providing access to TfSE's emerging analytical framework if at an earlier stage of development • Advocacy and securing funding
	Schemes not currently under development	
	• Local Transport Authorities • TfSE could be a joint scheme promoter	• Programme management, including stakeholder engagement with local partners and operators • Pre-feasibility work • Potential joint scheme promotion • Business case and scheme development and support, including use of and providing access to TfSE's emerging analytical framework • Advocacy and securing funding

Intervention	Lead Authority	TfSE Role
Active travel packages	• Sustrans / National Highways / Local Transport Authorities	• Stakeholder engagement, where appropriate, with local partners, Sustrans, National Highways and Central Government • Pre-feasibility work • Potential joint scheme promotion • Business case and scheme development and support, including use of and providing access to TfSE's emerging analytical framework • Advocacy and securing funding
For Strategic Road Network infrastructure	**Schemes under development**	
	• National Highways	• Stakeholder engagement with Central Government and local partners • Business case and scheme development and support, including use of and providing access to TfSE's emerging analytical framework if at an earlier stage of development • Advocacy and securing funding
	Schemes not currently under development	
	• National Highways • Local Transport Authorities	• Programme management, including stakeholder engagement with central government and local partners • Pre-feasibility work

Intervention	Lead Authority	TfSE Role
		• Business case and scheme development and support, including use of and providing access to TfSE's emerging analytical framework • Advocacy and securing funding
	Schemes under development	
For other highways infrastructure	• Local Transport Authorities	• Programme management, including stakeholder engagement with central Government and local partners • Pre-feasibility work • Business case and scheme development and support, including use of and providing access to TfSE's emerging analytical framework • Advocacy and securing funding

Page 169

Timing and phasing

In general, the vast majority of interventions included in the packages will be delivered through existing frameworks and investment cycles, in line with the Treasury Green Book and Department for Transport's appraisal guidance.

A small number of particularly complex and/or large-scale interventions may require bespoke procurement and delivery arrangements. Lessons should be captured from similar UK projects (e.g., Crossrail, HS2 etc.) to inform the approach for the delivery of these types of projects.

Timing the delivery of each intervention will also need to be carefully considered to avoid unintended negative consequences and ensure the greatest possible value for taxpayer and private investment. Examples of this may include:

- Ensuring highways projects are not delivered before enhanced mass transit, mobility hub and electric vehicle charging networks are in place to avoid inducing additional private car ownership and or use of carbon-intensive vehicles,
- Improving local walking and cycling infrastructure ahead of increasing rail services to avoid unnecessary congestion at station car parks and better ensure long-term modal shift, and
- Making sure mass transit and active travel infrastructure and networks are fully integrated with major highways projects such as the Lower Thames Crossing.

The timing and phasing of each package of intervention will be driven by their current state of development, industry funding cycles, and institutional capacity. An estimate of the schedule for each package becoming delivered and operational is presented in **Table 1** (also found in the Executive Summary).

For example, any rail intervention not currently included in the Rail Network Enhancements Pipeline – which is most of the interventions in this plan – will almost certainly be phased to be delivered in Control Period 8 (2029-2034) or thereafter.

Similarly, most of the interventions planned for the Strategic Road Network will fall into Road Investment Strategy 3 funding and delivery cycle (or later). interventions delivered through Local Transport Authorities will be subject to each authority's planning and funding cycle, which may be contingent on the adoption and refresh of Local Transport plans and (at a Local Planning Authority Level) Local Plans.

Some packages have interfaces that will also affect their phasing. For example:

- most elements in the Enhanced Rail Solent package should be delivered after the Core Solent Rail package;
- the business case for many highways interventions in the Kent, Medway and East Sussex highways package will rely on the timing and delivery of the Lower Thames Crossing; and
- the impacts of each package of intervention on carbon emissions are highly dependent on the trajectory of the decarbonisation of the transport system, which is tied to the Global Policy interventions.

There are also important interfaces within each package of intervention. For example, it will not be possible to deliver a high quality metro rail service for South Hampshire unless all interventions in the South Hampshire Rail packages are delivered. Similarly, a whole solution for the A27 relies on an end-to-end approach to this highway, rather than focussing only on "easy" schemes while putting off harder decisions.

Governance

The Cabinet Office's recommended methodology for the delivery of programmes is **Managing Successful Programmes (**MSP).

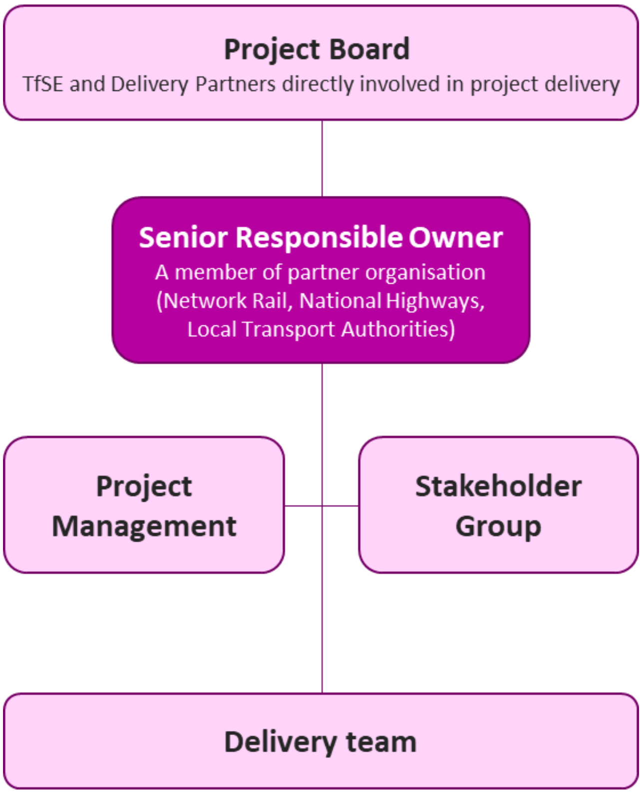
MSP represents proven good practice for successfully delivering of transformational change and is drawn from the experiences of both public and private sectors. TfSE's approach will align with this approach.

Project specific governance will need to be defined for each intervention. The overall structure should include a Senior Responsible Owner (SRO), a Project Board and key stakeholder group. An example structure is shown in **Figure 11**.

Under this arrangement:

- The SRO will be the Sponsor of the Project and, as such, will be responsible for the project outcomes and delivery.
- The SRO can be a member of the project delivery partner organisation (e.g., Network Rail, National Highways, Local Transport Authorities).
- The board will include members of TfSE and key delivery partners directly involved in the project delivery.
- The project board will meet regularly to review project progress and make decisions. The board will review the business case at appropriate project plan milestones.
- The stakeholder group will include organisations indirectly linked to the delivery of the project but interested in the project outcomes.

Figure 11: Project Governance Framework



[Flow chart showing Project Broad at the top leading to Senior Responsible Owner then Delivery Team, with side branches between the latter two for Project Management and Stakeholder Group]

Stakeholder engagement

TfSE's Technical Programme has been supported by an extensive programme of stakeholder engagement. TfSE held a public consultation on its draft Transport Strategy in the autumn of 2019 and a further public consultation on the draft Strategic Investment Plan in the summer of 2022.

TfSE has tailored its approach to stakeholder engagement at each stage of the technical programme and will continue to evolve its approach as the SIP moves into a delivery phase.

TfSE will therefore develop a new Stakeholder and Communications plan to support the delivery of the SIP. Given the wide range of stakeholders across the region, their differing views and specific local contexts, this Stakeholder and Communications plan should reconfirm the stakeholders set out how and when and by whom they will be engaged, and the input sought from them, and its purpose in the overall project programme.

The profile of stakeholders who will need to be engaged in future stages may be different to those involved at earlier stages.

For example, there will likely need to be more engagement with potential funders and delivery partners (developers, constructors, operators, etc.) to ensure the development of the packages of interventions are informed by the best available advice.

Monitoring and evaluation

TfSE and its partners will establish appropriate governance to oversee the development, delivery and benefits realisation arising from both place-based and global interventions included in this strategy – particularly the larger and/or more complex interventions, which may require a bespoke approach for delivery.

TfSE will develop a set of transport outcome and wider socio-economic and environmental indicators (KPIs) which will be used to monitor progress across the region and of and on our transport networks reported on annually. These will be used to not only monitor progress against our goals and priorities, but also help make the case for further intervention. They should also be used by scheme promoters delivering interventions contained within this plan. A selection of potentially suitable KPIs for monitoring and evaluation the packages of interventions in this plan are presented in **Table 4** for which regional and intervention specific targets will be set.

Table 4: Potential Monitoring Indicators

Strategic priorities	Indicators
Economic	
Better connectivity between our major economic hubs, international gateways and their markets.	• The delivery of improved road and railway links on corridors in need of investment. • Improved public transport access to Heathrow Airport. • Improved long-distance rail services (measured by journey time and service frequency).

Strategic priorities	Indicators
More reliable journeys for people and goods travelling between the South East's major economic hubs and to and from international gateways.	• Improved Journey Time Reliability on the Strategic Road Network, Major Road Network and local roads (where data is available). • Improved operating performance on the railway network, measured by Public Performance Measure (PPM) and other available passenger and freight performance measures, where available (e.g., right-time delivery).
A transport network that is more resilient to incidents, extreme weather and the impacts of a changing climate.	• Reduced delays on the highways network due to poor weather. • Reduced number of days of severe disruption on the railway network due to poor weather. • Metrics relating to reduced delay on road network suffering from Road Traffic Collisions.
A new approach to planning that helps our partners across the South East meet future housing, employment and regeneration needs sustainably.	• The percentage of new allocated sites in Local Plans supported by high frequency bus, mass transit or rail. • Clear and quantified sustainable transport access and capacity for Local Plan allocated sites.
A 'smart' transport network that uses digital technology to manage transport demand, encourage shared transport and make more efficient use of our roads and railways.	• Increase in the number of bus services offering 'Smart Ticketing' payment systems. • Number of passengers using 'Smart Ticketing'. • Number of passengers using shared transport.
Social	
A network that promotes active travel and active lifestyles to improve our health and wellbeing.	• Increase in the length of the National Cycle Network in the South East. • Increase in the length of segregated cycleways in the South East. • Increase mode share of trips undertaken by foot and cycle. • Increase number of bikeshare schemes in operation in the area. • Increase mode share of walking and cycling.
Improved air quality supported by initiatives to reduce congestion and encourage further shifts to public transport.	• Reduction in NOx, SOx and particulate pollution levels in urban areas.

Strategic priorities	Indicators
An affordable, accessible transport network for all that promotes social inclusion and reduces barriers to employment, learning, social, leisure, physical and cultural activity.	• A reduction in the indicators driving the Indices of Multiple Deprivation in the South East, particularly in the most deprived areas in the South East region.
A seamless, integrated transport network with passengers at its heart, making journey planning, paying for, and using different forms of transport simpler and easier.	• Increase in the number of cross-modal interchanges and/or ticketing options in the South East.
A safely planned, delivered, and operated transport network with no fatalities or serious injuries among transport users, workforce or the wider public.	• Reduction in the number of people Killed and Seriously Injured by road and rail transport.
Environmental	
A reduction in carbon emissions to net zero by 2050 at the latest to minimise the contribution of transport and travel to climate change.	• Reduction in carbon emissions by transport.
A reduction in the need to travel, particularly by private car, to reduce the impact of transport on people and the environment.	• A net reduction in the number of miles undertaken per person each weekday. • A reduction in the mode share of the private car (measured by passenger kilometres).
A transport network that protects and enhances our natural, built and historic environments.	• No transport schemes or interventions result in net degradation of the natural capital of the South East.
Use of the principle of 'biodiversity net gain' in all transport initiatives.	• Transport schemes or interventions to demonstrate environmental net gain.
Minimisation of transport's consumption of resources and energy.	• Reduction in non-renewable energy consumed by transport.

Next steps

TfSE is on a journey. Its role will evolve as it strengthens its capacity to support the delivery of this plan.

The next steps for TfSE are to:

- develop a delivery action plan for the SIP;
- identify and support key interventions that deliver the SIP that require additional support and capacity, making the case for funding to develop interventions and which interventions will come forward first;
- secure higher levels of transport investment in the South East's strategic transport network;
- engage and support TfSE's key stakeholders in responding to and overcoming emerging transport challenges including recovery of public transport provision to pre-pandemic levels and beyond – where reasonable; and
- maintain the Strategic Investment Plan as a "live" document, updating it where appropriate.

TfSE will do this by:

- developing regional data, modelling and analytics capability;
- evolving to deliver the SIP;
- implementing supporting strategies, including the Future Mobility Strategy and the Freight, Logistics and International Gateways Strategy;
- developing position statements on key issues, including active travel, rural mobility and decarbonisation; and
- committing to conducting a review and update of the Strategic Investment Plan every five years.

Appendices

Appendix A: List of interventions by package

This Appendix provides a summary of the delivery plan for the interventions contained with the Strategic Investment Plan.

The first table contains interventions that are in existing programmes are presented in the following order:

- National Highways led interventions on the Strategic Road Network
- Road Investment Strategy 2: 2020 – 2025 schemes
- Road Investment Plan 3 Pipeline schemes
- Smart Motorways Programme
- Local Authority led interventions, with strategic prioritisation and programme management provided by TfSE
- Large Local Major schemes
- Large Local Major schemes pipeline
- Major Road Network schemes
- Major Road Network schemes pipeline
- Local Authority led interventions, supported by TfSE
- Housing Infrastructure Fund schemes

The second table presents global package interventions. These are applicable across the whole region, led by multiple partners, or will require national delivery. As such, their costs are not known and require ongoing planning and delivery.

The third and final table presents the place-based packages of interventions. Interventions are grouped by TfSE sub-area and package.

Table information

Implementation timeframe

Interventions have been phased into one of three timeframes, indicating when the intervention will be live or complete:

- Short-Term: within the remaining years of the 2020s
- Medium-Term: the 2030s
- Long-Term: the 2040s

Costs

All costs are presented at a package level. The two numbers presented are:

- Capital costs of construction
- Annual capital costs for maintenance and renewals

They are estimates, often high-level, based on either published figures or comprising "bottom up" unit cost assumptions. All costs are mid-price estimates in 2020 prices. All intervention costs will be subject to further assessment as and when interventions are brought forward for scheme and business case development. Assessment will need to be proportionate to the stage of scheme development and adhere to relevant guidance.

Capital costs of construction are summed for interventions that are within the TfSE area and not yet being implemented.

Project stage

This refers to an intervention's status or stage of development that it has reached and cleared. Typically, this aligns to the level of business case already developed. Stages include:

- Ongoing;
- Pre-Strategic Outline Business Case (Pre-SOBC): yet to develop a business case;
- Strategic Outline Business Case (SOBC);
- Outline Business Case (OBC);
- Full Business Case (FBC); and
- Implementation/Implemented: under delivery or recently completed.

Next steps

This identifies the stage of development the intervention needs to enter or complete next in order to progress. Again, this typically refers to a relevant business case stage using similar terminology as for the project stage. It is recognised that different scheme promoters and funding bodies have different terminology, and hence it is noted that it might be an equivalent stage of business case. An intervention may be at such an early stage of development that a feasibility study is required; or conversely, very well developed and seeking planning and delivery powers or consent, or already being delivered. Next steps referred to in the tables include:

- Feasibility Study;
- SOBC (or equivalent);
- OBC (or equivalent);
- Planning Permission / Powers / Consents;
- FBC (or equivalent); and
- Ongoing / Delivery.

Scheme promoter

This refers to the single or potential multiple promoters of each intervention. Options identified, with the references used in each table, include:

- Network Rail (i) – for interventions on the rail network;
- National Highways (ii) – for interventions on the Strategic Road Network;

- Transport for the South East (iii) – reflecting a role that TfSE could hold to help accelerate the delivery of the programme and derive better outcomes; and
- Local Transport Authorities (iv) – for interventions on local highways networks and other public rights of way.

In practice it is recognised that there are other likely scheme promoters (e.g. High Speed 1 Ltd. for interventions on the High Speed 1 network; Sustrans for the National Cycle Network, Local Planning Authorities, and the private sector).

Delivery Partners

Similar to identifying the scheme promoter, there can be many delivery partners. The key partners have been identified and include parties who will be required to make or could make a material contribution to the planning, funding, and delivery of an intervention. Options identified, with the references used in each table, include:

- Department for Transport (or other central govenrment departments) (1);
- Network Rail (2);
- National Highways (3);
- Active Travel England (4);
- TfSE (5);
- Local authorities (6);
- Transport operators (7);
- Other private sector organisations (8); and
- Sustrans (9)

Potential TfSE role

Ways in which TfSE can lead aspects and support planning and delivery of the programme are identified. Options identified, with the references used in each table, include:

- Programme Management (A);
- Pre-feasibility Work & Funding (B);
- (Joint) Scheme Promoter (C);
- Business Case & Scheme Development & Funding (D);
- Use of Analytical Framework (E);
- Advocacy & Securing Funding (F);
- Procurement & Sourcing (G);
- Resource Capacity & Capability Funding (H)

Table A.1: Existing and committed programmes

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
Road Investment Strategy 2 schemes (£690m / £55m p.a.)							
I1	M27 Junction 8	Short	Implementation	(Ongoing) Delivery	ii	1, 3, 6, 8	F
I2	A31 Ringwood	Short	Implementation	(Ongoing) Delivery	ii	1, 3, 6, 8	F
I5	A27 East of Lewes Package	Short	Implementation	(Ongoing) Delivery	ii	1, 3, 6, 8	F
I3	A27 Arundel Bypass	Short	OBC	Powers / Consents	ii	1, 3, 5, 6, 8	F
R1	M3 Junction 9	Short	OBC	Powers / Consents	ii	1, 3, 5, 6, 8	F
I4	A27 Worthing and Lancing Improvement	Short	SOBC	OBC	ii	1, 3, 5, 6, 8	F
X1	M2 Junction 5	Short	SOBC	FBC	ii	1, 3, 5, 6, 8	F
Road Investment Strategy 3 Pipeline schemes (£3,480m / £251m p.a.)							
Y1	Lower Thames Crossing (costings for Kent-side only)	Medium	OBC	Powers / Consents, FBC	ii	1, 3, 5, 6, 8	F
I6	Southampton Access (M27 Junction 2 and Junction 3)	Medium	SOBC	Feasibility Study	ii	1, 3, 5, 6, 8	B, F
I7	A27 Lewes - Polegate	Short	Pre-SOBC	SOBC	ii	1, 3, 5, 6, 8	B, F
I8	A27 Chichester Improvements	Medium	Pre-SOBC	SOBC	ii	1, 3, 5, 6, 8	B, F
R3	A404 Bisham Junction	Short	Pre-SOBC	SOBC	ii	1, 3, 5, 6, 8	B, F
R4	A3/A247 Ripley South	Short	Pre-SOBC	SOBC	ii	1, 3, 5, 6, 8	B, F
X2	A2 Brenley Corner Enhancements	Short	Pre-SOBC	SOBC	ii	1, 3, 5, 6, 8	B, F
X3	A2 Dover Access	Short	Pre-SOBC	Feasibility Study	ii	1, 3, 5, 6, 8	B, F
X4	A21 Safety Enhancements (being brought forward to RP2)	Short	Pre-SOBC	Feasibility Study	ii	1, 3, 5, 6, 8	B, F

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
Smart Motorways Programme (£350m / £30m p.a.)							
R2	M3 Junction 9 – Junction 14 Smart Motorway	Short	Implementation - paused	Paused	ii	1, 3, 6, 8	F
R15	M4 Junction 3 - Junction 12 Smart Motorway	Short	Implementation - ongoing	(Ongoing) Delivery	ii	1, 3, 6, 8	F
X15	M20 Junction 3 - Junction 5 Smart Motorway	Medium	Implemented	(Ongoing) Delivery	ii	1, 3, 6, 8	N/A
X13	M2 Junction 4 - Junction 7 Smart Motorway	Short	SOBC	Feasibility Study	ii	1, 3, 5, 6, 8	F
Major Road Network Schemes (£250m / £15m p.a.)							
I14	A259 Bognor Regis to Littlehampton Enhancement	Short	OBC	Powers / Consents, FBC	iv	1, 4, 5, 6, 8	A, D, F, H
X6	A28 Birchington, Acol and Westgate-on-Sea Relief Road	Short	OBC	Powers / Consents, FBC	iv	1, 4, 5, 6, 8	A, D, F, H
I17	A259 (King's Road) Seafront Highways Structures Renewal Programme	Short	OBC	Powers / Consents, FBC	iv	1, 4, 5, 6, 8	A, D, F, H
N3a	A22 Corridor Package	Short	OBC	Powers / Consents, FBC	iv	1, 4, 5, 6, 8	A, D, F, H
I12	Northam Rail Bridge Replacement and Enhancement	Short	SOBC	OBC	iv	1, 4, 5, 6, 8	A, D, F, H
I15	A259 South Coast Road Corridor - Eastbourne to Brighton	Short	SOBC	OBC	iv	1, 3, 4, 5, 6, 8, 9	A, D, F, H
Major Road Network Scheme Pipeline (£850m / £66m p.a.)							
N3b	A22 Corridor - Hailsham to Uckfield	Short	OBC	Powers / Consents, FBC	iv	1, 5, 6, 8	A, F

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
I17	A259 (King's Road) Seafront Highways Structures Renewal Programme (MRN)	Short	SOBC	OBC	iv	1, 6, 8	A, D, F, H
I16	A259 Chichester to Bognor Regis Enhancement	Short	Pre-SOBC	SOBC	iv	1, 2, 4, 5, 6, 7, 8	A, B, D, F, H
N2	A24/A243 Knoll Roundabout and M25 J9A	Medium	Pre-SOBC	SOBC	iv	1, 3, 5, 6, 8	A, B, D, F, H
N4	A2270/A2101 Corridor Movement and Access Package	Short	Pre-SOBC	SOBC	iv	1, 5, 6, 8	A, B, D, F, H
R6	New Thames Crossing East of Reading	Long	Pre-SOBC	SOBC	ii	1, 5, 6, 8	A, B, D, F, H
X7	A228 Colts Hill Strategic Link	Medium	Pre-SOBC	SOBC	iv	1, 5, 6, 8	A, B, D, F, H
Large Local Major Schemes (£650m / £49m p.a.)							
R5	A31 Farnham Corridor	Short	SOBC	OBC	iv	1, 4, 5, 6, 8	A, D, F, H
I11	Portsmouth City Centre Road	Short	SOBC	OBC	iv	1, 4, 5, 6, 8	A, D, F, H
I9	A326 Capacity Enhancements	Short	SOBC	OBC	iv	1, 5, 6, 8	A, D, F, H
X5	A229 Bluebell Hill Junction Upgrades	Short	SOBC	OBC	iv	1, 3, 5, 6, 8	A, D, F, H
I10	West Quay Realignment	Short	Pre-SOBC	SOBC	iv	1, 5, 6, 8	A, B, D, F, H
Large Local Major Scheme Pipeline (£100m / £5m p.a.)							
N1	A22 N Corridor (Tandridge) - South Godstone to East Grinstead Enhancements	Medium	Pre-SOBC	Feasibility Study	iv	1, 3, 5, 6, 8	A, B, D, F, H
Housing Infrastructure Fund Schemes (£250m / £15m p.a.)							
R7	A320 North Corridor (HIF)	Short	OBC	Powers / Consents, FBC	iv	1, 3, 6, 8	F
S6	Hundred of Hoo Railway - Hoo Peninsula Passenger Rail Services	Medium	OBC	Powers / Consents, FBC	i, iv	1, 2, 6, 7, 8	F

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
X22	A228 Medway Valley Enhancements	Medium	OBC	Powers / Consents, FBC	iv	1, 3, 6, 8	F

Table A.2: Global package interventions

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
N/A	Decarbonisation – including faster adoption of zero emission vehicles	Ongoing	Ongoing	Ongoing	i, ii, iii, iv	1, 2, 3, 4, 5, 6, 7, 8	B, C, D, E, F, G, H
N/A	BSIP/Enhanced Partnership Plans and public transport fare reductions	Ongoing	Ongoing	Ongoing	i, iii, iv	1, 2, 5, 6, 7, 8	B, C, D, E, F, G, H
N/A	National and local road user charging	Ongoing	Ongoing	Ongoing	ii, iv	1, 3, 5, 6, 8	B, D, E, F, H
N/A	Active travel (including LCWIPs) and micromobility trends	Ongoing	Ongoing	Ongoing	i, ii, iv	1, 2, 3, 4, 5, 6, 8, 9	B, D, E, F, H
N/A	Digital Technology - faster adoption, including remote working and virtual access to services	Ongoing	Ongoing	Ongoing	i, ii, iv	1, 2, 3, 5, 6, 7, 8	B, D, F, H
N/A	Integration and Access - across and between modes and between spatial and transport planning	Ongoing	Ongoing	Ongoing	i, ii, iii, iv	1, 2, 3, 4, 5, 6, 7, 8	B, C, D, E, F, G, H

Page 184

Table A.3: Place-based packages of intervention

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
Solent and Sussex Coat							
South Hampshire Rail (Core)							
A1	Solent Connectivity Strategic Study	Medium	Pre-SOBC	SOBC	i	1, 2, 5, 6, 7, 8	D, E, F
A2	Botley Line Double Tracking	Medium	Pre-SOBC	SOBC	i	1, 2, 5, 6, 7, 8	D, E, F
A3	Netley Line Signalling and Rail Service Enhancements	Medium	Pre-SOBC	SOBC	i	1, 2, 5, 6, 7, 8	D, E, F
A4	Fareham Loop / Platform	Medium	Pre-SOBC	SOBC	i	1, 2, 5, 6, 7, 8	D, E, F
A5	Portsmouth Station Platforms	Medium	Pre-SOBC	SOBC	i	1, 2, 5, 6, 7, 8	D, E, F
A6	South West Main Line - Totton Level Crossing Removal	Medium	Pre-SOBC	SOBC	i	1, 2, 5, 6, 7, 8	D, E, F
A7	Southampton Central Station Upgrade and Timetabling	Medium	Pre-SOBC	SOBC	i	1, 2, 5, 6, 7, 8	D, E, F
A8	Eastleigh Station Platform and Approach Flyover Enhancement	Medium	Pre-SOBC	SOBC	i	1, 2, 5, 6, 7, 8	D, E, F
A9	Waterside Branch Line - Reopening	Short	SOBC	OBC	i	1, 2, 5, 6, 7, 8	D, E, F
A10	West of England Service Enhancements	Medium	Pre-SOBC	SOBC	i	1, 2, 5, 6, 7, 8	D, E, F
A11	Additional Rail Freight Paths to Southampton	Short	Pre-SOBC	SOBC	i	1, 2, 5, 6, 7, 8	D, E, F
South Hampshire Rail (Enhanced)							
B1	Southampton Central Station - Woolston Crossing	Long	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
B2	New Southampton Central Station	Long	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
B3	New City Centre Station	Long	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
B4	South West Main Line - Mount Pleasant Level Crossing Removal	Long	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
B5	West Coastway Line - Fareham to Cosham Capacity Enhancements	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
B6	West Coastway Line - Cosham Station Relocation	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
B7	Eastleigh to Romsey Line - Electrification	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
B8	Havant Rail Freight Hub	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
B9	Fratton Rail Freight Hub	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
B10	Southampton Container Port Rail Freight Access and Loading Upgrades	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, F
B11	Southampton Automotive Port Rail Freight Access and Loading Upgrades	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, F
South Hampshire Mass Transit							
C1	Southampton Mass Transit	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	F
C2	South East Hampshire Rapid Transit	Medium	Pre-SOBC	SOBC	iv	1, 2, 3, 5, 6, 7, 8	F
C3	New Southampton to Fawley Waterside Ferry Service	Medium	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, F, H
C4	Southampton Cruise Terminal Access for Mass Transit	Medium	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, F
C5	M271 Junction 1 Strategic Mobility Hub	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 6, 8	B, D, F, H

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
C6	M27 Junction 5 / Southampton Airport Strategic Mobility Hub	Medium	Pre-SOBC	Feasibility Study	iv	1, 3, 6, 8	B, D, F, H
C7	M27 Junction 7/8 Strategic Mobility Hub	Medium	Pre-SOBC	Feasibility Study	iv	1, 3, 6, 8	B, D, F, H
C8	M27 Junction 9 Strategic Mobility Hub	Medium	Pre-SOBC	Feasibility Study	iv	1, 3, 6, 8	B, D, F, H
C9	M275 Junction 1 Strategic Mobility Hub	Medium	SOBC	Feasibility Study	iv	1, 3, 6, 8	B, D, F, H
C10	Clarence Pier Bus-Hovercraft Interchange	Short	Pre-SOBC	Feasibility Study	iii, iv	1, 3, 6, 8	B, D, F, G, H
C11	Improved Gosport – Portsmouth and Portsmouth – Hayling Island Ferries	Short	Pre-SOBC	Feasibility Study	iii, iv	1, 3, 6, 8	B, D, F, G, H
South Hampshire Active Travel							
E1	Solent Active Travel (including LCWIPs)	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8, 9	B, D, F
Isle of Wight Mass Transit and Connections							
D1a	Bus Mass Transit - Newport to Yarmouth	Medium	Pre-SOBC	Feasibility Study	iv	1, 5, 6, 7, 8	B, D, F, H
D1b	Bus Mass Transit - Newport to Ryde	Medium	Pre-SOBC	Feasibility Study	iv	1, 5, 6, 7, 8	B, D, F, H
D1c	Bus Mass Transit - Newport to Cowes	Medium	Pre-SOBC	Feasibility Study	iv	1, 5, 6, 7, 8	B, D, F, H
D1d	Isle of Wight Railway Service Enhancements	Medium	Pre-SOBC	Feasibility Study	i, iv	1, 2, 5, 6, 7, 8	B, D, F, H
D1e	Isle of Wight Railway Extensions or Mass Transit alternative - Shanklin to Ventnor	Medium	SOBC	Feasibility Study	iv	1, 2, 5, 6, 7, 8	B, D, F, H
D1f	Isle of Wight Railway Extensions or Mass Transit alternative - Shanklin to Newport	Medium	SOBC	Feasibility Study	iv	1, 2, 5, 6, 7, 8	B, D, F, H
D2a	Operating Hours and Frequency Enhancements	Short	Pre-SOBC	Feasibility Study	iii, iv	1, 5, 6, 7, 8	B, D, F, H
D2b	New Summer Route - Ryde to Southampton	Short	Pre-SOBC	Feasibility Study	iii, iv	1, 5, 6, 7, 8	B, D, F, H

Page 188

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
Sussex Coast Rail							
F1	West Coastway Strategic Study	Medium	Pre-SOBC	SOBC	i	1, 2, 5, 6, 7, 8	B, D, E, F
F2	West Worthing Level Crossing Removal	Medium	Pre-SOBC	SOBC	i	1, 2, 5, 6, 7, 8	B, D, F
Sussex Coast Mass Transit Rail							
G1	Shoreham Strategic Mobility Hub	Short	Pre-SOBC	H, Feasibility Study	iv	1, 3, 6, 8	B, D, E, F, H
G2	A27/A23 Patcham Interchange Strategic Mobility Hub	Short	Pre-SOBC	G, H, Feasibility Study	iii, iv	1, 2, 3, 5, 6, 7, 8	A, B, C, D, F, G, H
G3	Falmer Strategic Mobility Hub	Short	Pre-SOBC	H, Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
G4	Eastbourne/Polegate Strategic Mobility Hub	Medium	Pre-SOBC	H, Feasibility Study	i, iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
G5	Sussex Coast Mass Rapid Transit	Medium	Pre-SOBC	G, H, Feasibility Study	iii, iv	1, 2, 3, 5, 6, 7, 8	A, B, C, D, E, F, G, H
G6	Eastbourne/Wealden Mass Rapid Transit	Short	Pre-SOBC	H, Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
G7	Hastings/Bexhill Mass Rapid Transit	Medium	Pre-SOBC	H, Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
G8	A27 Falmer – Polegate Bus Stop and Layby Improvements	Medium	SOBC	H, OBC	ii	1, 2, 3, 5, 6, 7, 8	D, F, H
Sussex Coast Active Travel							
H1	Sussex Coast Active Travel Enhancements (including LCWIPs)	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8, 9	F
Solent and Sussex Coast Highways							

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
I13	New Horsea Bridge and Tipner Bridge	Short	Pre-SOBC	SOBC	iv	1, 3, 5, 6, 8	F
I18	A29 Realignment including combined Cycleway and Footway	Short	FBC	(Ongoing) Delivery	iv	1, 3, 6, 8	F
I19	M27/M271/M275 Smart Motorway(s)	Short	Pre-SOBC	SOBC	ii	1, 3, 4, 6, 8	F
I20	A27 Tangmere Junction Enhancements	Medium	Pre-SOBC	Feasibility Study	ii	1, 3, 6, 8	B, D, E, F
I21	A27 Fontwell Junction Enhancements	Medium	Pre-SOBC	Feasibility Study	ii	1, 3, 6, 8	B, D, E, F
I22	A27 Worthing (Long Term Solution)	Long	Pre-SOBC	Feasibility Study	ii	1, 3, 6, 8	B, D, E, F
I23	A27 Hangleton Junction Enhancements	Medium	Pre-SOBC	SOBC	ii	1, 3, 6, 8	F
I24	A27 Devils Dyke Junction Enhancements	Medium	Pre-SOBC	SOBC	ii	1, 3, 6, 8	F
I25	A27 Falmer Junction Enhancements	Medium	Pre-SOBC	SOBC	ii	1, 3, 6, 8	F
I26	A27 Hollingbury Junction Enhancements	Medium	Pre-SOBC	SOBC	ii	1, 3, 6, 8	F
London to Sussex Coast							
London to Sussex Coast Rail (Resilience)							
J1	Croydon Area Remodelling Scheme	Medium	OBC	Powers / Consents	i	1, 2, 5, 6, 7, 8	F
J2	Brighton Main Line - 100mph Operation	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
J3	Brighton Station Additional Platform	Medium	Pre-SOBC	SOBC	i	1, 2, 5, 6, 7, 8	B, D, E, F
J4	Reigate Station Upgrade	Short	OBC	FBC	i	1, 2, 5, 6, 7, 8	F
J5	Arun Valley Line - Faster Services	Short	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
J6	East Coastway Line - Faster Services	Short	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
J7	Brighton Main Line - Reinstate Cross Country Services	Short	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	F

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
J8	New Station to the North East of Horsham	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
J9	Newhaven Port Capacity and Rail Freight Interchange Upgrades	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, F
J10	Uckfield Branch Line - Hurst Green to Uckfield Electrification	Medium	SOBC	OBC	i	1, 2, 5, 6, 7, 8	B, D, E, F
J11	Redhill Aerodrome Chord	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
London to Sussex Coast (Reinstatements)							
K1	Uckfield - Lewes Wealden Line Reopening - Traction and Capacity Enhancements	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
K2	Uckfield - Lewes Wealden Line Reopening - Reconfiguration at Lewes	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
K3	Spa Valley Line Modern Operations Reopening - Eridge to Tunbridge Wells West to Tunbridge Wells	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
London to Sussex Coast Mass Transit							
L1	Fastway Extension: Crawley - Horsham	Short	Pre-SOBC	G, H, Feasibility Study	iii, iv	1, 2, 3, 5, 6, 7, 8	A, B, C, D, E, F, G, H
L2	Fastway Extension: Crawley - East Grinstead	Short	Pre-SOBC	G, H, Feasibility Study	iii, iv	1, 2, 3, 5, 6, 7, 8	A, B, C, D, E, F, G, H
L3	Fastway Extension: Haywards Heath - Burgess Hill	Short	Pre-SOBC	G, H, Feasibility Study	iii, iv	1, 2, 3, 5, 6, 7, 8	A, B, C, D, E, F, G, H
L4	Fastway Extension: Crawley - Redhill	Short	Pre-SOBC	G, H, Feasibility Study	iii, iv	1, 2, 3, 5, 6, 7, 8	A, B, C, D, E, F, G, H
L5	A22 Corridor Rural Bus Service Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H

Page 191

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
L6	A23 Corridor Rural Bus Service Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
L7	A24 Corridor Rural Bus Service Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
L8	A26 Corridor Lewes - Royal Tunbridge Wells Rural Bus Service Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
L9	A26 Corridor Newhaven Area Rural Bus Service Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
L10	A272 Corridor Rural Bus Service Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
L11	A264 Corridor Rural Bus Service Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
L12	A29 Corridor Rural Bus Service Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
L13	A283 Corridor Rural Bus Service Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
L14	A281 Corridor Rural Bus Service Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
L15	Three Bridges Strategic Mobility Hub	Medium	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, F, H
London to Sussex Coast Active Travel							
M1	Burgess Hill/Haywards Heath Local Active Travel Infrastructure	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8	F
M2	East Grinstead Local Active Travel Infrastructure	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8	F

Page 192

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
M3	Eastbourne/Hailsham Local Active Travel Infrastructure	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8	F
M4	Gatwick/Crawley Local Active Travel Infrastructure	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8	F
M5	Horsham Local Active Travel Infrastructure	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8	F
M6	Lewes/Newhaven Local Active Travel Infrastructure	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8	F
M7	Reigate/Redhill Local Active Travel Infrastructure	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8	F
M8	East Sussex Inter-Urban Active Travel Infrastructure	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8, 9	B, D, F, H
M9	Surrey Inter-urban Active Travel Infrastructure	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 6, 8, 9	B, D, F, H
M10	West Sussex Inter-Urban Active Travel Infrastructure	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8, 9	B, D, F, H
M11	New London - Brighton National Cycle Network Corridor	Medium	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8, 9	B, D, F, H
M12	New Crawley - Chichester National Cycle Network Corridor	Medium	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8, 9	B, D, F, H
M13	London - Paris New "Avenue Verte"	Medium	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 5, 6, 8, 9	B, D, F, H
London to Sussex Coast Highways							
N5	M23 Junction 8a New Junction and Link Road - Redhill	Long	Pre-SOBC	Feasibility Study	ii	1, 3, 6, 8	F
N6	M23 Junction 9 Enhancements - Gatwick	Medium	Pre-SOBC	Feasibility Study	ii	1, 3, 6, 8	F

Page 193

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
N7	A23 Carriageway Improvements - Gatwick to Crawley	Medium	Pre-SOBC	Feasibility Study	ii	1, 3, 6, 8	F
N8	A264 Horsham - Pease Pottage Carriageway Enhancements	Medium	Pre-SOBC	Feasibility Study	iv	1, 3, 6, 8	F
N9	A264 Crawley - East Grinstead Dualling and Active Travel Infrastructure	Medium	Pre-SOBC	Feasibility Study	iv	1, 3, 6, 8	F
N10	Crawley Western Link Road and Active Travel Infrastructure	Long	Pre-SOBC	Feasibility Study	iv	1, 3, 6, 8	F
N11	A24 Dorking Bypass	Medium	Pre-SOBC	Feasibility Study	iv	1, 3, 6, 8	F
N12	A24 Horsham to Washington Junction Improvements	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 6, 8	F
N13	A24 Corridor Improvements Horsham to Dorking (LLM Pipeline)	Long	Pre-SOBC	Feasibility Study	iv	1, 3, 5, 6, 8	F
N14	A23 Hickstead and Bolney Junction Enhancements	Medium	Pre-SOBC	Feasibility Study	ii	1, 3, 6, 8	F
N15	A23/A27 Patcham Interchange Junction Enhancements	Short	Pre-SOBC	Feasibility Study	ii	1, 3, 6, 8	F
N16	A26 Lewes - Newhaven Realignment and Junction Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 6, 8	F
N17	A26 Lewes - Uckfield Enhancements	Medium	Pre-SOBC	Feasibility Study	iv	1, 3, 6, 8	F
N18	A22 Uckfield Bypass Dualling	Short	Pre-SOBC	Feasibility Study	iv	1, 6, 8	F
N19	A22 Smart Road Trial Proposition Study	Short	OBC	Powers / Consents, FBC	iv	1, 3, 6, 8	F
Wessex Thames							

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
Wessex Thames Rail							
O1	Western Rail Link to Heathrow	Medium	SOBC	OBC	i	1, 2, 5, 6, 7, 8	B, E, F
O2	Southern Rail Link to Heathrow	Long	Feasibility Study	Development	i	1, 2, 5, 6, 7, 8	B, E, F
O3	Reading to Basingstoke Enhancements	Long	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
O4	North Downs Line - Electrification	Long	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
O5	North Downs Line - Level Crossing Removals	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
O6	North Downs Line - Service Level and Capacity Enhancements	Short	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
O7	Guildford Station Upgrade	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
O8	New Station Guildford West (Park Barn)	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
O9	New Station Guildford East (Merrow)	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
O10	Redhill Station Upgrade	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
O11	Dorking Deepdene Station Upgrade	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
O12	South West Main Line / Portsmouth Direct Line - Woking Area Capacity Enhancement	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
O13	South West Main Line / Basingstoke Branch Line - Basingstoke Enhancement Scheme	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
O14	Cross Country Service Enhancements	Short	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
O15	Portsmouth Direct Line - Line Speed Enhancements	Short	Pre-SOBC	(Ongoing) Delivery	i	1, 2, 5, 6, 7, 8	B, D, E, F
O16	Portsmouth Direct Line - Buriton Tunnel Upgrade	Long	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
O17	South West Main Line - Dynamic Signalling	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
O18	Theale Strategic Rail Freight Terminal	Short	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, F
O19	West of England Main Line - Electrification from Basingstoke to Salisbury	Long	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
O20	Reading to Waterloo Service Enhancements	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F, H
Wessex Thames Mass Transit							
P1	Basingstoke Mass Rapid Transit	Short	Pre-SOBC	SOBC	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
P2	Blackwater Valley Mass Rapid Transit	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
P3	Bracknell/Wokingham Bus Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
P4	Elmbridge Bus Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
P5	Epsom/Ewell Bus Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
P6	Guildford Sustainable Movement Corridor	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
P7	Slough/Windsor/Maidenhead Area Bus Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
P8	Newbury/Thatcham Bus Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
P9	Reading Mass Rapid Transit	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
P10	Spelthorne Bus Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
P11	Woking Bus Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
P12	A4 Reading - Maidenhead - Slough - London Heathrow Airport Mass Rapid Transit	Short	Pre-SOBC	Feasibility Study	iii, iv	1, 2, 3, 5, 6, 7, 8	A, B, C, D, E, F, G, H
P13	A329/B3408 Reading - Bracknell/Wokingham Mass Rapid Transit	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
P14	Winchester Bus Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
P15	Andover Bus Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
P16	Runnymede Bus Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
P17	London Heathrow Airport Bus Access Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
P18	Berkshire, Hampshire and Surrey Inter-urban Bus Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F, H
Wessex Thames Active Travel							
Q1	Berkshire, Hampshire and Surrey Urban and Inter-urban Active Travel Infrastructure	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 4, 5, 6, 7, 8, 9	B, D, F, H
Wessex Thames Highways							
R8	M4 Junction 10 Safety Enhancements	Short	Pre-SOBC	Feasibility Study	ii	1, 3, 6, 8	F
R9	M3 Junction 7 and Junction 8 Safety and Capacity Enhancements	Short	Pre-SOBC	Feasibility Study	ii	1, 3, 6, 8	F
R10	A3 Guildford Local Traffic Segregation	Medium	Pre-SOBC	Feasibility Study	ii	1, 3, 6, 8	B, D, E, F

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
R11	A3 Guildford Long Term Solution	Long	Pre-SOBC	Feasibility Study	ii	1, 3, 6, 8	B, D, F
R12	A34 Junction and Safety Enhancements	Short	Pre-SOBC	Feasibility Study	ii	1, 3, 6, 8	B, D, F
R13	A322 and A329(M) Smart Corridor	Short	FBC	(Ongoing) Delivery	iv	1, 3, 6, 8	F
R14	A339 Newbury to Basingstoke Safety Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 6, 8	B, D, F
Kent, Medway, and East Sussex (KMES)							
KMES Rail – Classic							
S1	St Pancras International Domestic High Speed Platform Capacity	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
S2	London Victoria Capacity Enhancements - Signalling and Digital Rail	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
S3	Bakerloo Line Extension	Medium	SOBC	OBC	i, iv	1, 2, 6, 7, 8	E, F
S4	South Eastern Main Line - Chislehurst to Tonbridge Capacity Enhancements	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
S5	London Victoria to Shortlands Capacity Enhancements	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
S6	Hoo Peninsula Passenger Rail Services	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
S7	North Kent Line / Hundred of Hoo Railway - Rail Chord	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
S8	Thameslink - Extension to Maidstone and Ashford	Short	FBC	(Ongoing) Delivery	i	1, 2, 5, 6, 7, 8	F
S9	North Kent Line - Service Enhancements	Short	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
S10	North Kent Line / Chatham Main Line - Line Speed Enhancements	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
S11	Otterpool Park/Westenhanger Station Additional Platform	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
S12	Integrated Maidstone Stations	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
S13	Dartford Station Remodelling/Relocation	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
S14	Canterbury Interchange Rail Chord	Medium	Pre-SOBC	SOBC	i	1, 2, 5, 6, 7, 8	B, D, E, F
S15	New Station - Canterbury Interchange	Medium	Pre-SOBC	SOBC	i	1, 2, 5, 6, 7, 8	B, D, E, F
S16	New Strood Rail Interchange	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
S17	Rail Freight Gauge Clearance Enhancements	Medium	Pre-SOBC	SOBC	i	1, 2, 5, 6, 7, 8	B, D, E, F
S18	Crossrail - Extension from Abbey Wood to Dartford / Ebbsfleet	Short	SOBC	OBC	i, iv	1, 2, 5, 6, 7, 8	D, E, F
S19	High Speed 1 / Waterloo Connection Chord - Ebbsfleet Southern Rail Access	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
S20	Ebbsfleet International (Northfleet Connection)	Medium	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
S21	Ebbsfleet International (Swanscombe Connection)	Long	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
S22	Gatwick - Kent Service Enhancements	Short	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
KMES High Speed Rail East							
T1	High Speed East - Dollands Moor Connection	Medium	SOBC	OBC	i	1, 2, 5, 6, 7, 8	B, D, E, F
T2	High Speed 1 / Marsh Link - Hastings, Bexhill and Eastbourne Upgrade	Medium	SOBC	OBC	i	1, 2, 5, 6, 7, 8	D, F
KMES High Speed Rail North							

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
U1	High Speed 1 - Link to Medway (via Chatham)	Long	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
U2	High Speed 1 - Additional Services to West Coast Main Line	Short	Pre-SOBC	Feasibility Study	i	1, 2, 5, 6, 7, 8	B, D, E, F
KMES Mass Transit							
V1	Fastrack Expansion - Swanscombe Peninsula	Short	Pre-SOBC	SOBC	iv	1, 2, 3, 5, 6, 7, 8	B, D, F, H
V2	Fastrack Expansion - Northfleet to Gravesend	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, F, H
V3	Fastrack Expansion - Medway	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, F, H
V4	Medway Mass Transit	Medium	Pre-SOBC	Feasibility Study	iii, iv	1, 2, 3, 5, 6, 7, 8	A, B, C, D, E, F, G, H
V5	Medway Mass Transit - Extension to Hoo Peninsula	Medium	Pre-SOBC	Feasibility Study	iii, iv	1, 2, 3, 5, 6, 7, 8	A, B, C, D, E, F, G, H
V6	Medway to Maidstone Bus Priority	Short	Pre-SOBC	Feasibility Study	iii, iv	1, 2, 3, 5, 6, 7, 8	A, B, C, D, E, F, G, H
V7	Medway Mass Transit - Chatham to Medway City Estate New Bridge	Medium	Pre-SOBC	Feasibility Study	iii, iv	1, 2, 3, 5, 6, 7, 8	A, B, C, D, E, F, G, H
V8	Medway Mass Transit - Chatham to Medway City Estate Water Taxi	Short	Pre-SOBC	Feasibility Study	iii, iv	1, 2, 3, 5, 6, 7, 8	A, B, C, D, E, F, G, H
V9	Maidstone Bus Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 6, 7, 8	B, D, E, F, H
V10	Dover Bus Rapid Transit	Short	Implementation	Feasibility Study	iv	1, 2, 3, 6, 7, 8	F
V11	Sittingbourne Bus Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 6, 7, 8	B, D, E, F, H

Page 200

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
V12	Sevenoaks Bus Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 6, 7, 8	B, D, E, F, H
V13	Thanet Bus Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 6, 7, 8	B, D, E, F, H
V14	Folkestone Bus Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 6, 7, 8	B, D, E, F, H
V15	Ashford Bus Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 6, 7, 8	B, D, E, F, H
V16	Royal Tunbridge Wells/Tonbridge Bus Enhancements	Long	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 6, 7, 8	B, D, E, F, H
V17	Thames Gateway/Gravesham Bus Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 6, 7, 8	B, D, E, F, H
V18	Canterbury/Whitstable/Herne Bay Bus Enhancements	Long	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 6, 7, 8	B, D, E, F, H
V19	Ferry Crossings - New Sheerness to Hoo Peninsula Service	Medium	Pre-SOBC	Feasibility Study	iii, iv	1, 2, 3, 5, 6, 7, 8	A, B, C, D, E, F, G, H
V20	Ferry Crossings - Sheerness to Chatham/Medway City Estate/Strood Enhancements	Medium	Pre-SOBC	Feasibility Study	iii, iv	1, 2, 3, 5, 6, 7, 8	A, B, C, D, E, F, G, H
V21	Ferry Crossings - Ebbsfleet - Tilbury Enhancements	Medium	Pre-SOBC	Feasibility Study	iii, iv	1, 2, 3, 5, 6, 7, 8	A, B, C, D, E, F, G, H
V22	Inland Waterway Freight Enhancements	Medium	Pre-SOBC	Feasibility Study	iv	1, 2, 3, 5, 6, 7, 8	B, D, E, F
KMES Active Travel							
W1	Medway Active Travel Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8, 9	F
W2	Medway Active Travel - Chatham to Medway City Estate River Crossing	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8	B, D, F, H
W3	Kent Urban Active Travel Infrastructure	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8	F

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
W4	Kent Inter-urban Active Travel Infrastructure	Short	Pre-SOBC	SOBC	iv	1, 3, 4, 6, 8, 9	B, D, F, H
W5	Faversham - Canterbury - Ashford - Hastings National Cycle Network Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8, 9	B, D, F, H
W6	Tonbridge - Maidstone National Cycle Network Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8, 9	B, D, F, H
W7	Sevenoaks - Maidstone - Sittingbourne National Cycle Network Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8, 9	B, D, F, H
W8	Bromley - Sevenoaks - Royal Tunbridge Wells National Cycle Network Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8, 9	B, D, F, H
W9	East Sussex Local Active Travel Infrastructure	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8	F
W10	East Sussex Inter-Urban Active Travel Infrastructure	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8, 9	B, D, F, H
W11	Royal Tunbridge Wells - Hastings National Cycle Network Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 4, 6, 8, 9	B, D, F
W12	Canterbury Placemaking and Demand Management Measures	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 6, 7, 8	B, D, E, F, H
W13	Medway Placemaking and Demand Management Measures	Short	Pre-SOBC	Feasibility Study	iii, iv	1, 3, 6, 7, 8	A, B, C, D, E, F, G, H
W14	Dover Placemaking and Demand Management Measures	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 5, 6, 7, 8	B, D, E, F, H
KMES Highways							
X8	Digital Operations Stack and Brock	Medium	Pre-SOBC	Feasibility Study	ii	1, 3, 6, 7, 8	F
X9	A20 Enhancements for Operations Stack & Brock	Short	Pre-SOBC	Feasibility Study	ii, iv	1, 3, 6, 7, 8	F

Map Ref.	Intervention	Implementation Timeframe	Project stage	Next step(s)	Scheme promoters	Key delivery partners	Potential TfSE Role
X10	Kent Lorry Parks (Long Term Solution)	Short	Pre-SOBC	Feasibility Study	ii	1, 3, 5, 6, 7, 8	F
X11	Dover Freight Diversification	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 5, 6, 8	B, D, F
X12	A2 Canterbury Junctions Enhancements	Medium	Pre-SOBC	Feasibility Study	ii	1, 3, 6, 8	F
X14	M20 Junction 6 Sandling Interchange Enhancements	Medium	Pre-SOBC	Feasibility Study	ii	1, 3, 6, 8	F
X16	M25 Junction 1a Enhancements	Medium	Pre-SOBC	Feasibility Study	ii	1, 3, 6, 8	F
X17	M25 Junction 5 Enhancements	Medium	Pre-SOBC	Feasibility Study	ii	1, 3, 6, 8	F
X18	Herne Relief Road	Short	Implementation	(Ongoing) Delivery	iv	1, 3, 6, 8	F
X19	Canterbury East Relief Road	Long	Pre-SOBC	Feasibility Study	iv	1, 3, 6, 8	F
X20	New Maidstone South East Relief Road	Medium	Pre-SOBC	Feasibility Study	iv	1, 3, 6, 8	F
X21	A228 Hoo Peninsula Enhancements	Short	Pre-SOBC	Feasibility Study	iv	1, 3, 6, 8	F
X23	Strood Riverside Highways Enhancement and Bus Lane	Medium	Pre-SOBC	Feasibility Study	iv	1, 3, 6, 7, 8	B, D, F, H
X24	A259 Level Crossing Removals – east of Rye	Medium	Pre-SOBC	Feasibility Study	ii	1, 3, 6, 8	B, D, F
X25	A21 Kippings Cross to Lamberhurst Dualling and Flimwell and Hurst Green Bypasses	Long	Pre-SOBC	Feasibility Study	ii	1, 3, 6, 8	F
X26	Hastings and Bexhill Distributor Roads	Medium	Pre-SOBC	Feasibility Study	iv	1, 3, 6, 8	F

Appendix B: Summary of Evidence Base Reports

Area Studies

- Strategic Narrative
- Delivery Plan
- Decarbonisation Thematic Plan
- Levelling-up Thematic Plan
- Rail Thematic Plan
- Bus, Mass Transit and Shared Mobility Thematic Plan
- Strategic Active Travel and Micromobility Thematic Plan
- Highways Thematic Plan
- Appraisal Specification Report
- Strategic Programme Outline Case, Options Assessment Report, and Evidence Base Report relating to:
  - Solent and Sussex Coast
  - London to Sussex Coast
  - Wessex Thames
  - Kent, Medway and East Sussex
- Integrated Sustainability Assessment

Previous Reports

- TfSE's Economic Connectivity Review (2018)
- TfSE's Transport Strategy (2020)
- TfSE's Future Mobility Strategy (2021)
- TfSE's Freight, Logistics and International Gateways Strategy (2022)
- TfSE Future Organisation Report (2021)

Technical Studies

- Strategic Investment Plan Evidence Base (2022)
- Strategic Investment Plan Funding and Financing Technical Annex (2022)
- COVID-19 Response (January 2021)
- Bus Back Better Regional Evidence Base (TBC - 2022)
- Decarbonisation Pathways Technical Report (TBC – 2022)

Control Information

Prepared by	Prepared for
Steer 14-21 Rushworth Street London SE1 0RB +44 20 7910 5000 www.steergroup.com	Transport for the South East County Hall St. Anne's Crescent Lewes, BN7 1UE

Steer project/proposal number	Client contract/project number
24137701	Click here to enter text.

Author/originator	Reviewer/approver
JCO	SGB

Other contributors	Distribution	
JDB, ETC, MAT, LMB	Client:Transport for the South East	Steer:Project Team

Version control/issue number	Date
V1 Draft for Internal Review	March 2022
V2 Draft for Client Review (1)	April 2022
V3 Draft for Client Review (2)	April 2022
V4 Draft for Client Review (3)	3 May 2022
V5 Draft for Client Review (4)	11 May 2022
V6 Draft for Client Review (5)	16 May 2022
V7 Final MS Word Version	31 May 2022
V8 Plain English Version - Draft for Consultation	25 July 2022
V9 Plain English Version – Draft Final for Approval	13 October 2022

This page is intentionally left blank

APPENDIX 2 – TFSE INTERVENTIONS AND ALIGNMENT WITH CONNECTED SOUTHAMPTON

Proposed TfSE interventions focused on Southampton

TfSE Package	Proposed TfSE Intervention	Geographical Context	Connecting Southampton - Alignment		
			Successful Southampton	A System for Everyone	A Better Way to Travel
Core Rail	Solent Connectivity Strategic Study	City Region	X		
	Southampton Central Station Upgrade and Timetabling	Southampton	X	X	X
	Additional Rail Freight Paths to Southampton	Southampton	X		
Enhanced Rail	Southampton Central Station - Woolston Crossing	Southampton	X		
	New Southampton Central Station	Southampton	X	X	X
	New City Centre Station	Southampton	X	X	X
	South West Main Line - Mount Pleasant Level Crossing Removal	Southampton	X		
	Southampton Container Port Rail Freight Access and Loading Upgrades	Southampton	X		
	Southampton Automotive Port Rail Freight Access and Loading Upgrades	Southampton	X		
	Southampton Mass Rapid Transit	Southampton	X	X	X
Mass Transit	New Southampton to Fawley Waterside Ferry Service	City Region	X		X
	Southampton Cruise Terminal Access for Mass Transit	Southampton	X		X
	Ferry Operating Hours and Frequency Enhancements	City Region	X		
	New Summer Route - Ryde to Southampton	City Region	X		
Active Travel	Solent Active Travel (including LCWIPs)	Southampton		X	
Strategic Highways	West Quay Realignment (LLM)	Southampton		X	X
	A3024 Northam Rail Bridge Replacement and Enhancement (MRN)	Southampton	X		X
	M27/M271/M275 Smart Motorway(s)	City Region	X		

Proposed TfSE interventions in the wider City Region/Solent area that enable Southampton focused interventions

TfSE Package	Proposed TfSE Intervention	Geographical Context	Connecting Southampton - Alignment		
			Successful Southampton	A System for Everyone	A Better Way to Travel
Core Rail	Solent Connectivity Strategic Study	City Region	X		
	Botley Line Double Tracking	City Region	X		
	Netley Line Signalling and Rail Service Enhancements	City Region	X		
	Fareham Loop / Platform	City Region	X		
	South West Main Line - Totton Level Crossing Removal	City Region	X		
	Eastleigh Station Platform and Approach Flyover Enhancement	City Region	X		
	Waterside Branch Line Reopening	City Region	X		X
Enhanced Rail	West Coastway Line - Fareham to Cosham Capacity Enhancements	Solent	X		
Mass Transit	M271 Junction 1 Strategic Mobility Hub	City Region	X	X	X
	M27 Junction 5 / Southampton Airport Strategic Mobility Hub	City Region	X	X	X
	M27 Junction 7/8 Strategic Mobility Hub	City Region	X	X	X
Strategic Highways	M27 Junction 8 (RIS2)	City Region	X		
	Southampton Access (M27 Junction 2 and Junction 3) (RIS3 Pipeline)	City Region	X		
	A326 Capacity Enhancements (LLM)	City Region	X		

Appendix 3

SOUTHAMPTON CITY COUNCIL

Equality and Safety Impact Assessment

The **Public Sector Equality Duty** (Section 149 of the Equality Act) requires public bodies to have due regard to the need to eliminate discrimination, advance equality of opportunity, and foster good relations between different people carrying out their activities.

The Equality Duty supports good decision making – it encourages public bodies to be more efficient and effective by understanding how different people will be affected by their activities, so that their policies and services are appropriate and accessible to all and meet different people's needs. The Council's Equality and Safety Impact Assessment (ESIA) includes an assessment of the community safety impact assessment to comply with Section 17 of the Crime and Disorder Act and will enable the Council to better understand the potential impact of proposals and consider mitigating action.

Name or Brief Description of Proposal	Endorsement of the Transport for the South East Strategic Investment Plan as a Plan supporting the Connecting Southampton Transport Strategy
Brief Service Profile (including number of customers)	

The Connected Southampton Transport Strategy 2040 was adopted as the Council's fourth Local Transport Plan (LTP) by Council in March 2019. The LTP consists of a number of parts that together provide the evidence-led policy for transport in Southampton, including three-year Implementation Plans.

Transport for the South East's (TfSE) Strategic Investment Plan (SIP) complements the 'Connected Southampton Transport Strategy' by setting out the long-term investment framework up to 2050 based around eight key investment priorities:

- Regeneration and Growth
- Decarbonisation and the Environment
- Adapting to a New Normal
- Levelling Up Left Behind Communities
- World Class Urban Transport Systems
- Transforming East – West Connectivity
- Resilient Radial Corridors
- Global Gateways and Freight.

The key priorities for the SIP are well aligned to the three strategic goals of Connected Southampton, including 'A Successful Southampton', 'A System for Everyone' and 'A Better Way to Travel'.

To support the delivery of the SIP investment priorities the SIP evidence base sets out a pipeline of strategic transport schemes across the region, including proposed schemes for Southampton. The packages are based on four geographical areas across the TfSE region, including the Solent and Sussex Coast, as well as a global package of interventions. The interventions for Southampton and the wider city region are grouped into local and strategic rail (core and enhanced rail), mass transit, active travel and strategic highways, and are set out in Appendix 2.

The draft TfSE Strategic Investment Plan was subject to a 12-week statutory consultation period between June and September 2023, which resulted in over 600 responses from residents, businesses and visitors across the South East. As part of the development of the SIP, an Integrated Sustainability Assessment was undertaken on the proposals and is available to download here: DRAFT Strategic Investment Plan - evidence base - Transport for the South East.

This Equality and Safety Impact Assessment considers the key principles of Strategic Investment Plan and the proposed interventions set out in the evidence base. Additional, and more detailed, Equality and Safety Impact Assessments will be undertaken as any proposed schemes are developed. These schemes will also be subject to consultation and engagement as part of their individual design processes and statutory assessments for major schemes.

Summary of Impact and Issues

Overall, the SIP and the eight key priorities are likely to have a positive impact on people living, working and visiting Southampton. However, there are particular measures proposed within the supporting evidence base that may have some negative impacts on people with particular characteristics, including local and/or national road user charging.
If a road user charging scheme is taken forward in the lifetime of the SIP, it could potentially have a negative impact on people from lower income households or those who are less mobile due to their age, pregnancy or a disability. These people could potentially be impacted by increased transport costs or restricted access.
It should be noted that progression of the proposed interventions included in the SIP evidence base are subject to future funding being secured and consultation and engagement. If interventions are taken forward, more detailed project specific ESIAs will be undertaken as part of the design process as well as any statutory assessments.

Potential Positive Impacts

The overall draft Strategic Investment Plan will have a positive impact on people living, visiting and working in the city, including people with protected characteristics. This is due to the SIP proposing measures that will improve transport services and infrastructure for all people.

Responsible Service Manager	Wade Holmes
Date	13/01/23

Approved by Senior Manager	Pete Boustred
Date	17/01/2023

Potential Impact

Impact Assessment	Details of Impact	Possible Solutions & Mitigating Actions
Age	As part of the Global Intervention Package, TfSE are proposing that options for road user charging are investigated for potential implementation. These measures are proposed to mitigate the negative impacts of private vehicles, including congestion and poor air quality, and to work towards the goal of net zero by 2050. If a road user charging scheme is taken forward for Southampton, it could have a negative impact on people with reduced mobility, including older people. This may impact on their ability to access local facilities and services, such as healthcare, shops and leisure facilities.	The Strategic Investment Plan proposes supporting packages of interventions including measures that would help mitigate the impact of any proposed road user charging scheme. This includes enhanced bus, rail, water and active travel measures that would support mode shift by making travel by these modes more attractive, safer and cheaper.
Disability	As above, proposed road user charging measures could impact on disabled people’s ability to access local facilities and services.	The impact of any potential road user charging scheme could be reduced through the delivery of interventions that improve travel by bus, rail, water and active travel.
Gender Reassignment	No impact	
Marriage and Civil Partnership	No impact	
Pregnancy and Maternity	As above, proposed road user charging measures could impact the ability of pregnant people in accessing local facilities and services by private vehicle.	The impact of any potential road user charging scheme could be reduced through the delivery of interventions

Impact Assessment	Details of Impact	Possible Solutions & Mitigating Actions
		that improve travel by bus, rail, water and active travel.
Race	No impact	
Religion or Belief	No impact	
Sex	No impact	
Sexual Orientation	No impact	
Community Safety	Proposals in the SIP will help improve community safety by delivering high quality transport infrastructure that is safe and secure. This will include measures such as improved crossing facilities, junction enhancements, CCTV, lighting and high quality public spaces.	
Poverty	As above, if a road user charging scheme is taken forward, it could have a negative impact on people from lower income households who may not be able to afford additional costs when using private vehicles.	The Solent and Sussex Coast and the Global Proposed packages of interventions include measures that could help mitigate the impact of any proposed road user charging scheme. This includes enhanced bus, rail, water and active travel measures that would support mode shift by making travel by these modes more attractive and safer. The Global Package also includes proposals for cheaper public transport, which could help mitigate the impact of any road user charging scheme.
Health & Wellbeing	The overall SIP is likely to have a positive impact on health and wellbeing by reducing congestion and improving road safety and air quality through the provision of better public transport and active travel	

Impact Assessment	Details of Impact	Possible Solutions & Mitigating Actions
	services and infrastructure. The proposals in the SIP will also support increased mobility helping people to access jobs, education, facilities and services more easily and reducing levels of social isolation through the provision of better transport services.	
Other Significant Impacts	Proposed major schemes, such as the rail interventions, may have an impact on the environment, including the proposed rail tunnel under the River Itchen.	As schemes are developed and taken through the design process, statutory assessments will be undertaken to better understand any impacts on the environment. These assessments will be reported to Cabinet/Council as part of scheme approvals.

This page is intentionally left blank

DECISION-MAKER:	CABINET
SUBJECT:	WATER PROCUREMENT CONTRACT
DATE OF DECISION:	7TH FEBRUARY 2023
REPORT OF:	**COUNCILLOR BOGLE** **CABINET MEMBER FOR ECONOMIC DEVELOPMENT**

CONTACT DETAILS				
Executive Director	**Title**	**Executive Director of Place**		
	Name:	**Adam Wilkinson**	Tel:	023 8254 5853
	E-mail	**Adam.Wilkinson@southampton.gov.uk**		
Author:	**Title**	**Energy Manager**		
	Name:	**Jason Taylor**	Tel:	023 8083 2641
	E-mail	**Jason.taylor@southampton.gov.uk**		

STATEMENT OF CONFIDENTIALITY
N/A

BRIEF SUMMARY
The water supply and wastewater services for commercial customers were de-regulated in April 2017, which means that Southampton City Council (the Council) can now select its water supplier in a similar way to the energy market. Since 2017 the Council has been in contract with Business Stream (a water retailer) to supply its water services to its commercial (non-domestic buildings and operations).
The existing contract with Business Stream ends 31st March 2023 and an assessment of the procurement options to secure a new contract has taken place.
A suitable procurement route using a Framework Agreement offered by NEPO311 Water Framework has been identified as the most appropriate and cost effective option for procuring the services.
This report accordingly recommends proceeding with a direct award to Wave Utilities using the NEPO311 Water Framework.

RECOMMENDATIONS:		
	(i)	That Cabinet approves Wave Utilities are awarded the contract to provide Southampton City Council's water supply and waste water retail services using the NEPO311 Water Framework, with a view to award a contract commencing 1st April 2023 for 3+2 years.
	(ii)	Delegate authority to the Head of Corporate Estates and Assets following consultation with the Divisional Head of Supplier Management, to finalise any specific terms of the contract with Wave Utilities, then award and enter into the call off contract under the NEPO framework agreement, and carryout all necessary actions to facilitate the execution, implementation and operation of the contract.

REASONS FOR REPORT RECOMMENDATIONS	
1.	The Council's existing water procurement contract is coming to an end 31st March 2023 and therefore a new contract is required.
2.	The recommended option outlined within this report provides a compliant route to procurement, along with the full range of services, cost effectiveness and quality sought by the council.
ALTERNATIVE OPTIONS CONSIDERED AND REJECTED	
3.	95% of the total annual water services costs for non-domestic properties relates to wholesale charges, which will continue to be allocated to the existing OFWAT regulated wholesale supplier, Southern Water, who is the regional supplier of water and wastewater services within Southampton. The total costs for the annual water services are £0.37M in 2022.
4.	**Option 1 – Open Tender** It is considered there is no added benefit going to open market for procuring the Council's water services as using a framework provides broadly the same result to set up a new compliant contract before expiry of the current contract.
5.	**Option 2 – Self Supply Under License** An assessment has been undertaken to understand whether there are cost benefits for the Council securing a Water Self-Supply Licence via the water regular OFWAT. This would have enabled the Council to become a water retailer and supply water directly to itself via the water wholesaler – Southern Water. The result of the assessment showed that there was not a business case to take this option forward. This was due to the Council not meeting the minimum water consumption amount to make self-supply financially viable.
6.	**Option 3 - Crown Commercial Services (CCS) RM6178 procurement Framework** Two compliant procurement frameworks were identified that closely match the Council's requirements. Crown Commercial Services (CCS) RM6178 and NEPO311. Suppliers from both frameworks were engaged to understand the current market offer as the water market is still not as advanced as other utility sectors.
7.	The NEPO procurement framework has only one supplier nominated for the framework.
8.	The CCS framework has the option to go for e-auction or further competition. However, e-auction would not guarantee a contract tailored to the Council's needs as the CCS framework undertakes an auction on behalf of all interested parties.
9.	Further competition is not considered to be the right way to market, considering retail services amount to only 5% (or £18,500) of whole contract value and the same result will be achieved using NEPO framework direct award.
DETAIL (Including consultation carried out)	
10.	A new water supply and wastewater contract is required to comply with the Council's Contract Procedure Rules.

11.	After reviewing the two frameworks under consideration with stakeholders , undertaking supplier engagement and performance assessments and considering Service Level Agreements and account management aspects, Wave Utilities using the NEPO framework is the recommended route to establish a new contract.
12.	NEPO framework has reliable Service Level Agreement (SLA), water and ancillary services, billing flexibility, easy query management system, which will greatly reduce the Councils account managers involvement in query management for individual sites, along with active water management services provided at no additional cost. In addition, carbon footprint and additional reports for better monitoring are provided annually. The Framework also has social value criterion set to 15% of evaluation weightings and this aligns well to the Council's Social Value and Green City Procurement Policy. The social value contribution and performance would be monitored as part of the approach to managing the contract.
13.	The key benefits that the Council will secure from this procurement are: • A competitively priced retailer for water and wastewater services. • The use of actual meter readings for appropriate supplies and invoicing. • Electronic billing via an agreed format. • Ease of query management via online portal access to sites. • Clear separation of individual accounts for billing and calculation of debt overhead. • To create water efficiency savings. • Identify opportunities to further reduce the cost of water supplies. • Smart metering for appropriate water supplies.
14.	A framework agreement available through the NEPO311 Water Framework is deemed to be the most suitable and cost effective option to deliver the Council's requirements. The assessment of several alternative water retail suppliers and frameworks has confirmed the procurement of Wave Utilities via the NEPO framework best suits Southampton City Council needs.
15.	The contract awarded through the NEPO Framework Agreement would be for a fixed term of 3 years, with the option to extend the contract at the Council's sole discretion for an additional 2 years (3+2). The extension option will provide greater opportunity for water efficiency projects to be delivered as part of the contract.
16.	Social Value compliance and weighted evaluation criteria were set as part of NEPO framework award criteria, which meets and adds value to the Council's social value requirements i.e. the contractor delivers a number of ongoing social based volunteer projects that support schools, local communities and improve local environments.
17.	The Council's Energy Team have recently set up an electronic billing process, similar to that delivered for the payment of the gas and electricity invoices. This means that most water invoices are received and paid electronically with little or no manual intervention. However, due to the constraints of the water industry invoicing process this has not been as seamless as the gas and electricity billing process; therefore, the assessment of a water retailer has also been influenced by the electronic billing and query management

	capability of the water retailer. Wave meets the Council's requirements for electronic billing.
18.	The existing Business Stream contract ends 31st March 2023 and it is proposed the new contract will be drawn up and ready to sign in February 2023. A new contract will be in place early March 2023, with a commencement date of 1st April 2023. This will enable sufficient time to enable the work required to switch the water supplies to Wave.
RESOURCE IMPLICATIONS	
Revenue	
19.	Currently, the Council purchases approximately £0.37M of water and wastewater services per annum for its 205 commercial/non domestic water supplies, which equates to £1.85M over the maximum 5 year contract term.
20.	The revenue budget for the Councils non domestic water is currently held within each site/service area budget. The bills are received on behalf of the Council by the Energy Team centrally and then allocated to all individual sites via the accounting system. The current budget should cover the procurement.
21.	The Council is not able to change the wholesale supplier as this is regulated under OFWAT (the water regulator) rules. The remaining estimated 5% or £18,500 annual spend relates to the retail element (overhead) of the supply, which Wave will be responsible for. As circa 95% of the water account spend is dictated by the water regulator OFWAT the prospects to save costs on the procurement choice are minimal.
Property/Other	
22.	There are 205 individual water supply points (water and wastewater supplies) across the Council which are located in buildings, car parks, allotments and gardens.
LEGAL IMPLICATIONS	
Statutory power to undertake proposals in the report:	
23.	Section 1 of the Localism Act 2011. There is a requirement in both the Public Contracts Regulations (PCR) and the Council's Contract Procedure Rules (CPR) for the Council to comply with EU procurement regimes when procuring water and waste water.
Other Legal Implications:	
24.	N/A
RISK MANAGEMENT IMPLICATIONS	
25.	Risks around the identification and delivery of water efficiency works have been assessed as part of the procurement process. This is because the average water efficiency measures often take in excess of 4 years to payback. This could exceed the contract term. Within the Wave contract there is the option to deliver efficiency reports to identify water saving opportunities and fully fund efficiency measures either paid back via invoices or upfront payment, depending on the assessed payback period. This will enable suitable efficiency works to be funded by the most practical option.
26.	There is a risk that the popularity of the Framework Agreement causes a drop in service quality. The Council will include the portfolio of sites and water

	supplies as a part of the contract process. A portfolio specific management plan for the service will be secured through the contract process and linked to Key Performance Indicators within the contract. Service quality/levels are specified within the call off contract, and the relationship with the new water supplier will also be closely managed in the short term by the Council's Energy Team, with any major issues being escalated to NEPO. This risk will also be mitigated by strong and effective management of the contract.
27.	Additional precautions have been taken to ensure that the supplies (and accompanying information) will transfer correctly to the new retailer and vice versa. This will be closely managed as part of any transfer of supplies to the new contract by the Energy Team and through periodic performance meetings, and more frequently during the early stages of the contract (first 3-6 months).
POLICY FRAMEWORK IMPLICATIONS	
28.	The proposals support the Council's Vision, covered in the Corporate Plan 2022/30, to be a successful, sustainable organisation. This will be supported by securing a water contract that enables improvements to the electronic invoice process, further reducing administration need, and enabling the identification and investment for reducing water usage across our operations.

KEY DECISION?	**Yes**
WARDS/COMMUNITIES AFFECTED:	

SUPPORTING DOCUMENTATION

Appendices

1.	None

Documents In Members' Rooms

1.	None

Equality Impact Assessment

Do the implications/subject of the report require an Equality and Safety Impact Assessment (ESIA) to be carried out.	**No**

Data Protection Impact Assessment

Do the implications/subject of the report require a Data Protection Impact Assessment (DPIA) to be carried out.	**No**

Other Background Documents
Other Background documents available for inspection at:

Title of Background Paper(s)		**Relevant Paragraph of the Access to Information Procedure Rules / Schedule 12A allowing document to be Exempt/Confidential (if applicable)**
1.	None	

This page is intentionally left blank