

A meeting of the
**West of England Combined Authority
Overview and Scrutiny Committee**

will be held on

Date: 24 October 2017

Time: 10am

Place: Somerdale Pavilion, Tiberius Road, Keynsham, BS31 2FF

Notice of this meeting is given to members of the West of England Combined Authority Overview and Scrutiny Committee as follows:

Cllr Tim Ball, Bath & North East Somerset Council
Cllr Liz Richardson, Bath & North East Somerset Council
Cllr Kye Dudd, Bristol City Council
Cllr Margaret Hickman, Bristol City Council
Cllr Steve Pearce, Bristol City Council
Cllr Mark Weston, Bristol City Council
Cllr Geoff Gollop, Bristol City Council
Cllr Stephen Clarke, Bristol City Council
Cllr Paul Hughes, South Gloucestershire Council
Cllr Katherine Morris, South Gloucestershire Council
Cllr Pat Hockey, South Gloucestershire Council

Copies to:

Cllr Chris Blades, North Somerset Council
Cllr Charles Cave, North Somerset Council
Cllr Donald Davies, North Somerset Council

Cllr Dine Romero, Bath & North East Somerset Council (substitute for Cllr Tim Ball)

Enquiries to:

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West of England Combined Authority Overview and Scrutiny Committee Agenda

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- Inspect agendas and public reports five days before the date of the meeting
- Inspect agendas, reports and minutes of the WECA Overview and Scrutiny and all WECA Overview and Scrutiny Committees and Sub-Committees for up to six years following a meeting.
- Inspect background papers used to prepare public reports for a period public reports for a period of up to four years from the date of the meeting. (A list of background papers to a report is given at the end of each report.) A background paper is a document on which the officer has relied in writing the report.
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1. EVACUATION PROCEDURE

In the event of a fire, please await direction from the Somerdale Pavilion staff who will help assist with the evacuation. Please do not return to the building until instructed to do so by the fire warden(s)

2. APOLOGIES FOR ABSENCE

To receive apologies for absence from Members.

3. DECLARATIONS OF INTEREST UNDER THE LOCALISM ACT 2011

Members who consider that they have an interest to declare are asked to: a) State the item number in which they have an interest, b) The nature of the interest, c) Whether the interest is a disclosable pecuniary interest, non-disclosable pecuniary interest or non-pecuniary interest. Any Member who is unsure about the above should seek advice from the Monitoring Officer prior to the meeting in order to expedite matters at the meeting itself.

4. MINUTES

To consider and approve the minutes from 22 September 2017 of the West of England Combined Authority Overview and Scrutiny Committee.

5. ITEMS FROM THE PUBLIC

Members of the public can speak for up to 3 minutes each. The total time for this session is 30 minutes so speaking time will be reduced if more than 10 people wish to speak.

If you wish to present a petition or make a statement and speak at the meeting, you are required to give notice of your intention by noon on the working day before the meeting by e-mail to democratic.services@westofengland-ca.gov.uk. For this meeting, this means that your submission must be received in this office by **12noon on Thursday, 23 October 2017**.

If you wish to ask a question at the meeting, you are required to submit the question in writing to democratic.services@westofengland-ca.gov.uk no later than 3 working days before the meeting. For this meeting, this means that your question(s) must be received in this office by **5pm on Thursday, 19 October 2017**.

6. PETITIONS

Any member of the public in the West of England Combined Authority may present a petition at a West of England Combined Authority Overview and Scrutiny Committee Meeting.

7. WEST OF ENGLAND DRAFT JOINT SPATIAL PLAN

To present the publication version of the West of England Joint Spatial Plan (JSP) to the Scrutiny Committee for their views which will be reported to the Joint Committee when they consider the publication version JSP at their meeting on 30th October 2017.

8. FUNDING FOR INFRASTRUCTURE FEASIBILITY STUDIES

To appraise the Scrutiny Committee of the forthcoming formal investment request to fund feasibility studies and the development of business cases for strategically important infrastructure schemes within the West of England Combined Authority area that will be considered at the WECA Committee on the 30th October.

9. WEST OF ENGLAND COMBINED AUTHORITY AND MAYORAL BUDGET OUTTURN 2017/18

This Budget Outturn report will be considered by the WECA Committee at their meeting on 30th October 2017.

10. LAST ITEM: ANY OTHER ITEM THE CHAIR DECIDES IS URGENT

Next meeting: 10 November 2017

WEST OF ENGLAND COMBINED AUTHORITY: OVERVIEW AND SCRUTINY

22 September 2017

DRAFT MINUTES

1	ANNUAL BUSINESS ELECTION OF CHAIR AND VICE CHAIR Gill Sinclair, Deputy Monitoring Officer for the West of England Combined Authority opened the meeting and welcomed everyone to first West of England Combined Authority Overview and Scrutiny Committee. She requested nominations for Chair of the Committee. Cllr Morris proposed Cllr Clarke. Cllr Gollop seconded the proposal. There were no other nominations. On being put to the vote the motion was carried unanimously. Cllr Clarke took the Chair and requested nominations for Vice Chair. Cllr Richardson nominated Cllr Ball. Cllr Morris seconded the proposal. Cllr Clarke nominated Cllr Pearce. Cllr Gollop seconded the proposal. The proposals were put to vote: Cllr Ball received four votes Cllr Pearce received six votes On being put to the vote Cllr Pearce was elected Vice Chair with six votes.
2	APOLOGIES FOR ABSENCE Apologies were received from Cllr Mark Weston, Cllr Claire Hiscott attended on his behalf.
3	DECLARATIONS OF INTEREST UNDER THE LOCAL GOVERNMENT ACT 1972 There were no declarations of interest.
4	MINUTES As this was the first West of England Combined Authority Overview & Scrutiny Committee meeting there were no previous minutes to consider.
5	ITEMS FROM THE PUBLIC A question had been submitted by Christina Biggs to which a written response had been made available. A copy of the question and the response is included as an appendix A to these minutes.

	<p>Statements had been received from Cllr Lin Patterson, Christina Biggs and 2 from David Redgewell. The Chair invited attendees to speak in the order their statements were received, and noted that the statements will be included as an appendix B to the minutes.</p> <p>David Redgewell addressed the Committee on number of transport matters including his views on investment in the rail network. He felt there was a case to continue electrification and to support Metro West and to improve station access. He felt a bus review was required. He expressed concern that the West of England needed to compete with other regions to secure investment funding from Government.</p> <p>The Chair thanked David Redgewell for his comments.</p> <p>Cllr Lynn Patterson addressed the Committee regarding her concerns about transport in North East Bath, and specifically the 6/7 bus route. Changes to this were based on what was in her opinion a flawed survey. She felt the changes had impacted local shops and wanted to see improvements.</p> <p>The Chair thanked Cllr Patterson for her comments.</p> <p>The Chair asked David Redgewell for comment on second statement. David Redgewell addressed the Committee with his concerns about rail delivery. In his opinion WECA must focus on rail delivery and not be distracted by further studies which he felt should be split out from current delivery of Metro West, He felt it was crucial that discussions with Government do not confuse current and future (unfunded) projects and in his opinion the focus needs to be on delivery.</p> <p>Christina Biggs from FOSBR addressed the Committee. She expressed disappointment in the Joint Transport Study. She felt there was overemphasis on Metrobus and in her view the focus should be on suburban rail, and rail/bus interchange. She was anxious for the Portishead line to go ahead and reassured that discussions taking place between Network Rail and Bristol Port regarding use of the freight line. She would like to see the discussions about Henbury Loop reopened and to have further engagement.</p> <p>The Chair thanked Christina Biggs for her comments.</p>
<p>6</p>	<p>PETITIONS FROM MEMBERSHIPS</p> <p>None received.</p>
<p>7</p>	<p>WORK PROGRAMME</p> <p>Helen Edelstyn from WECA introduced this item which followed on from an informal scrutiny meeting on 17th July 2017 facilitated by the Centre for Public Scrutiny as which a long-list of areas to focus on had been identified including transport, housing and skills. Wider ‘framing’ questions had included the impact on local people, need for value for money and sustainability. Members will need to decide if these are correct and work with Chair and Vice Chair to develop a more detailed work programme.</p> <p>The Chair requested comments and the following points were noted:</p> <ul style="list-style-type: none"> - There is limited amount of time to deal with a large number of subject areas - There is opportunity to consider broader issues at Scrutiny and task smaller groups to discuss and report back. - There was a proposal to hold an intervening skype/informal meetings in between formal meetings to discuss progress before reporting back to the public meetings

	<ul style="list-style-type: none"> - There could be opportunity for the public to attend smaller group meetings where there are specific interests to discuss - There is the opportunity to use a mixture of approaches, including task and finish groups, enquiry days, sub-committees - There is a risk of superficially scrutinising everything and looking at nothing in detail and the need to identify where Scrutiny can make a difference. - There is a need to understand the remit of audit committee and how this complements scrutiny to ensure items are not missed - There was a proposal to hold meetings in different areas of the Region, ensuring that all meetings were close to public transport <p>A number of specific areas that could be discussed were raised:</p> <ul style="list-style-type: none"> - A request to include more details on the skills agenda. - A request to include more about environmental impact - An opportunity to look at transport, reflecting on public forum statements - The opportunity to not only look at individual topics and projects, but also the overall effectiveness of WECA <p>The Chair thanked Helen Edelstyn for her report noted the following actions:</p> <p>Action. A work programme discussion to be held at WECA, with Skype/Conference Call access for those unable to attend in person</p> <p>Action. Scrutiny meetings to be held in different venues across the Region within reach of public transport</p> <p>Action. Helen Edelstyn to work with Chair and Vice Chair to support development the work programme.</p>
8	<p>UPDATE ON INVESTMENT PROGRAMME</p> <p>Chris Jennings, Interim Head of Business and Skills from WECA, joined the meeting to provide an update on the Investment Prioritisation and an update on Skills.</p> <p>Investment prioritisation</p> <p>Chris Jennings introduced the paper and gave a brief summary to highlight the following points:</p> <ul style="list-style-type: none"> - The devolution deal provides £30m per year for 30 years which is not enough to do all the things that need to be done in the region. For example, the JTS identifies at least £9bn of potential projects just on transport. We need to work out most sensible way to invest this money and so that the whole investment package can be considered in totality. - The process is at an early stage of development. We are considering how we might use an economic model to help us best understand the economic impact of infrastructure schemes. We will also want to understand environmental impacts, inclusivity impacts and geographical nature across the whole region. <p>During the discussion Chris Jennings clarified the following points:</p> <ul style="list-style-type: none"> - The economic model will focus on economic growth and other methods will be needed to look at for example environmental impacts. - The economic model is focused on infrastructure projects and will not be appropriate for business/skills projects.

	<ul style="list-style-type: none"> - Project delivery might be commissioned to Local Authorities who were already providing input to develop business cases. - In response to concerns that the scope of the economic model did not include environmental, health and air pollution criteria, he confirmed that these factors are very important and the model only provides one piece of information to inform decision makers. - A number of the schemes to be considered are identified in the JTS and JSP and the process will be to work out the sequencing. Attention was drawn to the WECA decision on Friday 22nd September where £1.2m was approved to take forward business cases. - It is anticipated that the WECA Committee will wish to make further investment decisions ahead of a fully funded programme to start addressing some issues and would be important to involve scrutiny. - Whilst the JSP has not yet been agreed money has been released to take forwards business cases to ensure that schemes are deliverable, this will support the Examination in Public. <p>Members noted the following points:</p> <ul style="list-style-type: none"> - There is a risk that they will each have views on individual investments, but in this context they should be focusing on the rationale and process - There was a desire to look at social value and the impact onto communities - There was a need to ensure elements other than economic growth were being considered <p>The Chair thanked Chris Jennings for his report.</p>
9	<p>UPDATE ON SKILLS</p> <p>Chris Jennings provided a short update on Skills, and reminded Members of the five skills elements in the devolution deal, noting that these vary in terms of powers and responsibilities:</p> <ul style="list-style-type: none"> - Adult Education Budget - Apprenticeship Grants for Employers - National Work & Health Programme - Employee Support Innovation Pilot - Co-ordination of Careers advice and guidance <p>These were each discussed and the following points noted:</p> <p>Adult Education Budget:</p> <p>Chris Jennings reported that £17m annual spend is currently controlled nationally through skills funding agency. Devolution of this to WECA has been delayed pending government legislation and is now proposed from academic year 19/20. During 18/19 WECA will work closely with Government on transition arrangements. It was noted that a significant administrative process will be passed to the region to administer the £17m and that a large amount of this budget is to provide statutory provision.</p> <p>The following points were discussed:</p> <ul style="list-style-type: none"> - Chris Jennings clarified that the Combined Authority region will administer the Adult Education Budget and WECA are discussing with government how staff will be funded and how this will work. - Clarification of the actual figure was requested - It was requested that Scrutiny be provided with minutes from the Skills Advisory Board

	<p>- There could be opportunity to use existing staff from Local Authorities to support this new activity, but would require posts to be backfilled</p> <p>Apprenticeship Grants for Employers</p> <p>Chris Jennings reported that this has just completed. He confirmed that a performance report will be shared with Scrutiny Members.</p> <p>Work & Health Programme.</p> <p>Chris Jennings confirmed this is nationally run programme by DWP. Officers in Bristol have been leading work, and WECA are working with Bristol to support this process. Contracts to be awarded soon.</p> <p>Innovation Pilot.</p> <p>Chris Jennings report that DWP has awarded WECA £4m to work with 3000 residents in social housing to support them to advance employment. Each Local Authority will deliver its own elements of the project, co-ordinated by a WECA project manager. This is an innovation pilot so by its nature the outcomes are unknown but there is agreement with DWP that the general focus is to support people progressing their careers.</p> <p>Careers Advice and Guidance.</p> <p>Chris Jennings confirmed this covers schools up to older residents. There are opportunities to join this up regionally and improve the offering but there are no actual powers provided to WECA.</p> <p>The Chair thanked Chris Jennings for providing an update at short notice and noted this will be an area that Scrutiny will look at in future. The following actions were agreed:</p> <p>Chris Jennings to circulate summary information to Members</p> <p>Chris Jennings to provide confirmation of the actual Adult Education Budget Figure</p> <p>Helen Edelstyn to arrange for minutes of the Skills Advisory Board to be provided to Scrutiny Members</p> <p>Chris Jennings to share the performance report for Apprenticeship Grants for Employers with Scrutiny Members</p>
10	<p>2017 / 18 BUDGET</p> <p>Tim Richens, Interim Chief Financial Officer at WECA, joined the meeting.</p> <p>Tim Richens provided an overview of the scrutiny process around the budget, noting that the budget that was approved in March for the 17/18 financial year was prior to the Mayoral Election and was agreed under interim arrangements.</p> <p>Tim Richens confirmed that the first audit committee will take place at the end of at September and that for the 18/19 budget development there will be clear role for scrutiny and that early proposals for the Mayoral and Combined Authority budgets will come to this committee.</p>

	<p>In response to a question regarding whether a section 25 report would come to scrutiny, Tim Richens responded this is a report that looks at reserves and balances of Local Authorities and in statutory regulations is only required for Local Authorities that raise a precept on Council Tax. WECA is not a precepting body and therefore that part of regulations doesn't apply. However, he agreed that is prudent for WECA to monitor reserves and balances and has included detail of this in his report.</p> <p>In response to a question as to how WECA budget planning would interact with the Local Authority budget planning processes (to avoid scrutiny reviewing a proposal that has already been enshrined in a local authority budget) Tim Richens assured the Committee that he is working closely with the Section 151 officers from all of the Councils to ensure budget timelines are aligned, noting that statutory timelines are set out in legislation for WECA.</p> <p>Tim Richens drew the Committee's attention to the two elements of the budget set out in the report:</p> <p>Mayoral budget (annex 1) which includes costs of Mayor and dedicated support. This money comes from a business rates retention pilot agreed with Government. It also includes the transport grants that used to go directly to the Authorities and Tim Richens confirmed that in the first year these were distributed straight back to the councils.</p> <p>Combined Authority budget (annex 2) applies to all functions across CA. The largest element is transport functions. In the first year these services were commissioned from the councils who were previously providing them. This budget also includes WECA running costs to support statutory functions including finance.</p> <p>In response to a query Tim Richens confirmed there is no overlap in the transport funding but there may be opportunity to realise some efficiencies for some elements of delivery in the future</p> <p>There was a discussion about why WECA does not have precepting powers and Tim Richens confirmed this was a local decision by leaders during the devolution deal negotiations with Government.</p> <p>There was a discussion as to whether senior officer appointments could be shared with Local Authorities, and whether Senior Officer pay should be discussed by Scrutiny or Audit Committee. The Committee concluded the scrutiny of costs would be appropriately handled at this Committee, leaving approval of final accounts to Audit Committee (and thus avoiding any conflict of interest).</p> <p>The Chair thanked Tim Richens for his report.</p>
	<p>The meeting was adjourned at 11.40 for a short break.</p> <p>The meeting readjourned at 12.05. North Somerset Councillors who are permitted to sit alongside (but not part of) WECA Scrutiny joined the Committee for the proceeding Joint Committee items.</p>
11	<p>WEST OF ENGLAND COMBINED AUTHORITY REGIONAL STRATEGY</p> <p>Jessica Lee joined the meeting to present an update on the development of a regional strategy. Which will set out aspirations for region and the intention is ultimately to use this to help guide decision making. She drew attention to a strategy discussion paper that has been published and explained that objective is to ensure broad support from partners across the region, including officers from authorities and business partners. She explained that at the point of a</p>

final strategy there will be a business plan and performance framework setting out how we deliver what is in the strategy and drew attention to the three pillars of the strategy:

- Supporting business to succeed
- Developing skills
- Infrastructure (transport, housing and digital infrastructure)

Jessica Lee noted that an online feedback form has been available which officially closes 27th September, but stressed that her team are keen to continue discussions with this committee and other interested parties to ensure final product is the right one.

In response to a question regarding how successful has engagement been, Jessica Lee confirmed that opportunities to engage have been publicised and there has been attendance at all the drop-in sessions, with an additional one scheduled at the science park. There have also been a series of roundtable discussions and discussions with LEP groups.

In response to question about use of different channels to promote the engagement, Jessica Lee confirmed that the promotion had largely been via the website and twitter, plus invitations to specific roundtable events. She agreed that attendance at drop-in sessions had been varied, with some better attended than others where people had genuinely dropped-in.

In response to a question regarding response targets, Jessica Lee confirmed that targets had not been set for responses. At the date of the Committee meeting about 250 responses had been received through the online portal. She explained that the challenge with presenting a high-level framework discussion document is it doesn't necessarily appeal to everyone but given nature of documents her team were reasonably happy with the response rates.

In response to comments from Members that they were unaware of the discussion, Patricia Greer, Chief Executive of WECA, confirmed that the team had offered to provide sessions with all councillors in each council. A session had been run in South Glos and they would be happy to run sessions with other Councils.

The Committee discussed the report and the following points were noted:

- A request that the responses to the discussion document be shared with Scrutiny Committee
- A suggestion that information be shared with Parish Councils
- Concerns that the document focused on high skilled jobs and needed to include lower skilled and vocational work
- A suggestion that for this and future engagements employers should be asked to promote this to encourage engagement
- Cllr Morris requested it be put on record she was not happy with the document or the stakeholder engagement process and that the CA should have set targets for responses
- A concern that most SMEs would not engage with this type of document.
- A concern that the number of individual responses online was small
- A need to ensure it is clear this was a discussion document not a full consultation.

In response to a comment about whether the discussion paper was inclusive enough, Jessica Lee confirmed that the engagement had helped to identify areas where more work was needed, of which this was one. She also confirmed that Trade Unions had not yet been approached for their views.

In response to comments about the number of individual responses, Patricia Greer clarified that it was never the intention for this to be a public consultation. The strategy presents a high-level framework and the target for engagement was businesses, universities and local authorities

	<p>across the region. It was agreed that full details of the business engagement would be shared with Scrutiny members.</p> <p>In response to a question about engagement with North Somerset Jessica Lee confirmed that she has been working with North Somerset Officers on the papers, engagement sessions have been held in North Somerset, and the strategy has been discussed with the LEP Board. Business engagement invitations have used LEP stakeholder lists.</p> <p>The Chair thanked Jessica Lee for her report. He concluded that some issues had been raised, in particular around the scope and approach to engagement and that further information had been requested during the discussion. The following actions were noted:</p> <p>Jessica Lee to explore opportunity to share information on the regional strategy with Parish Councils</p> <p>Jessica Lee to share information about business engagement with Scrutiny Committee</p> <p>Jessica Lee to share responses to the strategy discussion with the Scrutiny Committee</p>
12	<p>KEY ISSUES REPORT FOR JOINT SPATIAL PLAN (JSP)</p> <p>Laura Ambler joined the meeting to update the Committee on the timetable for the JSP and emerging policy framework. She noted that the JSP is statutory development plan document and has already had two rounds of public consultation. Her update today relates to the regulation 19 plan which is the final draft plan published for consultation before it is submitted to the Secretary of State. Once published for consultation there cannot be any substantive changes to the plan and it is submitted to the Secretary of State with the consultation responses.</p> <p>The report sets out the overall timetable which is as follows:</p> <ul style="list-style-type: none"> - October 2017. Draft to Infrastructure Advisory Board and Joint Committee. - January 2017 Consultation closes - March 2018 Submission to Secretary of State - Aiming to adopt JSP late 2018. <p>Laura Ambler drew attention to the key issues that we are required to address:</p> <ul style="list-style-type: none"> - Duty to co-operate. This is a statutory duty of four authorities. Consultation to date has shown strong co-operation and DCLG refer to this as an exemplary project. - Housing need. A previous draft document had indicated 102 thousand, but our housing target is 105 thousand. This is the scale of growth. This will include 32k affordable homes. Highlighted that delivery of this will be a critical issue - Quality of place. Needs to have strategic principles in place. <p>Laura Ambler also drew attention to the emerging policy framework and the proposal to include seven policies which are set out in the report.</p> <ul style="list-style-type: none"> - Housing requirement from 2016 to 2036 - Affordable housing targets and means by which this will be delivered - Employment land requirement - Placemaking, noting relationship between this strategic plan v local plans - Spatial strategy – strategic development locations, and any exceptional circumstances - Strategic infrastructure requirements, in particular transport - Strategic development locations <p>The Committee discussed the document and noted the following points:</p> <ul style="list-style-type: none"> - Significant infrastructure is required before any housing infrastructure can be built, so concerns whether the plan is deliverable

	<ul style="list-style-type: none"> - Concerns about housing numbers and whether enough affordable housing - Concerns about availability of key worker housing - Concerns about availability of employment land - Concerns about quality of any new housing and how we might influence this - Concerns that there is no mention of air quality, noting targets for reduction - There has been opportunity to engage frequently with the process - Confirmation that we are the first JSP to go through this type of inspection - Questions about how the consultation responses are managed <p>Laura Ambler responded to the discussion and clarified the following points:</p> <ul style="list-style-type: none"> - Deliverability. Transport Infrastructure costs for JSP mitigations are estimated to be in order of £2bn. Although ambitious it is realistic. We feel we can meet this because of technical work on JTS and work now commissioned. We must demonstrate plan is sound – reasonable and deliverable – so deliverability at heart of this plan. - Overall approach. We have engaged with planning inspectorate and have been seeking QC advice to ensure plan is sound. - Transport mitigations. Whilst there are road schemes the focus is on enabling public transport. Sustainable transport is something that we have built into the plan. - Housing need. We have considered the local housing statement and are taking this into consideration. The plan will demonstrate flexibility and contingency. - Affordable housing. This is built into the evidence base and it is based on the strategic development plan. Actual delivery will be built into local plans. (It was clarified it is not the purpose of the JSP to enable residents to bid to live in other authority areas.) - Key worker housing. This is included in evidence base – affordable criteria takes account of income, and disposable income after housing costs met. We aim to ensure our affordable housing is truly affordable. - Employment land. There is an intention to include employment land as small plots at strategic development locations. - Public Consultation. The final public consultation is on what the authorities believe is the final plan. These representations go direct to the inspector along with the final plan and the inspector may discuss these matters at the examination in public. This is therefore a meaningful consultation. - Air quality. Transport a significant part of JSP. Intention is to ensure that the additional homes have no negative impact. Looking at zero carbon targets as part of the placemaking policy. We will need innovative solutions to fund this and have been looking at viability work. - Quality of Housing. Louise Fradd, SRO for the JSP confirm we have looked at Cambridge model and we are looking closely at placemaking and to ensure we bring in the quality element. <p>The Chair thanked Laura Ambler for her report.</p>
13	<p>JOINT TRANSPORT STUDY</p> <p>Bill Davies from WECA joined the meeting, accompanied by a representative from Atkins.</p> <p>Bill Davies confirmed that this study is currently advisory and does not at this stage represent the policy of the four councils. Next steps will be a public consultation in early 2018.</p> <p>Bill Davies explained that work on the Joint Transport Study has been in parallel with the JSP and consultations have been undertaken together. The objectives for study are in line with national guidance and include, emissions, accessibility, safety, quality of life, economic growth. Have looked at mix of transport and the importance of international gateways, port and airport. Consultation has asked for views on level of ambition, spend across different methods of</p>

	<p>transport, allocation of highway to public transport. We have seen strong agreement across main concepts.</p> <p>The Members discussed the report and noted the following points:</p> <ul style="list-style-type: none"> - Concerns that the report does not make any specific mention of air quality challenge in Bath - Opportunities to improve access to railway stations through public transport (Metrobus) - Concerns whether we are making the most of rail freight capacity - Ambition for 15-minute passenger service on the Severn Beach Line - Need for road schemes to spread prosperity to areas such as South Bristol rather than enable commuting through - Concerns that park and rides need to be linked up to railways - Concerns that an underground scheme may be a distraction - General concerns about air quality – we should be looking at a reduction in cars and move to innovative technologies such as driverless cars - Authorities will need to ensure the revenue implications of these capital schemes are understood <p>Bill Davies responded to the discussion and clarified the following points:</p> <ul style="list-style-type: none"> - Air quality. We are looking at transfer of road space to more sustainable forms of transport, and also looking at how we can encourage a shift in transport (e.g. parking fees) - Rail Freight. We have discussed with rail colleagues who have highlighted that with reduction in coal transport there is more opportunity for rail freight from Avonmouth and there is an opportunity to create a freight distribution point to service the West of England. We are keen to develop these opportunities and shift more freight onto rail. In addition, dynamic motorway management on M4 and M5 will support distribution centres as it is likely that lorry based distribution will continue during the lifetime of this study. We are working with Network Rail and authorities to look at opportunities to bid for funding to enable a boost to rail freight capacity in the area. - Air Quality. We acknowledge there are issues in Bath (and Bristol) and will ensure this is reflected clearly in the report. There is a wide variety of movement through the city and through traffic needs to be addressed. As part of thinking need to look at how schemes can be integrated effectively into the environment. This is a challenge that the transport industry needs to take away. - Metrobus. Routes are designed to cater for full range of travel arrangements across the route. The purpose of routes from towns to urban areas is to improve public transport opportunities to encourage a move from driving. - Road schemes and economic impact. The testing has been focused on how schemes improve travel and accessibility. Transport connectivity in South Bristol for example needs to support access to opportunity. - Emerging technologies. Conscious that disruptive technologies are starting to appear and that there will be a very challenging transition period. <p>The Chair thanked Bill Davies for his report.</p>
14	<p>AOB</p> <p>Cllr Davis queried where scrutiny of existing budgets was to take place, for example funding previously managed through the LEP. The Chair agreed to seek clarification on the scrutiny arrangements for these budgets and to report back to the Committee.</p>

	<p>Cllr Morris requested that meeting dates were circulated. Helen Edelstyn to ensure Scrutiny Members receive a list of meeting dates</p> <p>Cllr Gollop and Cllr Ball both requested WECA explore the use of Modern.Gov to distribute papers. Helen Edelstyn to discuss with IT</p> <p>The meeting concluded at 13.59</p>
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Appendix A – Public Forum: Question with Answer

Appendix B – Public Forum: Statements

Appendix A: Public Forum: Question

Christina Biggs, Friends of Suburban Bristol Railways (FOSBR)

1. What additions have been made to the transport schemes proposed in the December 2016 pre-consultation draft of the JTS, in response to the submissions from the public?

2. Safety of MetroBus bridges and entry flanges to guided busways

What trials have been made of the MetroBus bridge at Ashton Vale to make sure that the double-decker buses do not topple when mounting this steep and winding route over the rail line, and of the consequences to buses of missing the entry flanges into guided sections of the busways? Would the Metro Mayor be willing to be physically present in the bus when it is making trials at different entry speeds to make sure that badly trained or pressurised bus drivers are not putting themselves and the public at risk? Were there to be a fatal incident on a MetroBus guided busway would the Metro Mayor be willing to be charged for murder due to deliberate and irresponsible planning?

3. Portishead Line

Will WECA challenge the Portbury Dock on its alleged use of the freight paths and negotiate that during the works for Portishead Line that the weekend closures are from Friday to Monday inclusive, to maximise the efficiency of the engineering works? If the Port can prove it needs Monday or Friday running during this time, will WECA challenge the Portbury Dock to divert ships to Avonmouth dock, or use road freight?

4. Henbury Loop

Will WECA challenge the Port study costing of £128m for a bridge at St Andrews Gate level crossing, and request that the study scope is widened to consider a road bridge at St Andrew's Rd Station north of the conveyor belt terminus to provide the Port with alternative road access, to be funded from Network Rail level crossing elimination money? Will WECA carry out a survey to establish the precise amount of use that the Port of Avonmouth requires at St Andrew's Gate? Will WECA investigate the possibility of Henbury Loop trains reversing at Bristol Parkway both to increase ridership and to provide a clockface service that does not waste trainset rental time?

5. Thornbury Line

Will WECA attempt to gain access to the Grovesend tunnel beyond the bricked-up exit from the rail tunnel under the A38 (pictured) and to establish from Network Rail what their plans are for Tytherington quarry? Will WECA request Network Rail for an evaluation of the use of the fourth platform at Bristol Parkway as a passing loop for trains using Westerleigh Junction and learn about the technological advances in signalling that will considerably expand the capacity of the rail system for increased frequency? When investigating a Thornbury MetroBus, will it ensure a transit time to central Bristol to match the probable train transit time of 45 minutes?

Answer:

1. What additions have been made to the transport schemes proposed in the December 2016 pre-consultation draft of the JTS, in response to the submissions from the public?

The Joint Transport Study (JTS) draft final report has taken into account the outcomes of the 2016 consultation. The consultation highlighted general support for the interventions proposed and accordingly the core elements have been retained. Some schemes have been removed or reviewed as a result of the consultation responses, and the status of other schemes clarified. Whilst the performance of other schemes suggested in the consultation was considered, they may not have demonstrated a robust business case. However, the support for investment in sustainable transport modes is reflected in the priority given to these modes in the study recommendations.

2. Safety of MetroBus bridges and entry flanges to guided busways

Metrobus is not a WECA project but I understand that comprehensive vehicle trials of the MetroBus bus-way between the Long Ashton Park and Ride site and Cumberland Road will be undertaken prior to the launch of the scheme, including the skew bridge over the Portbury Freight Line.

3. Portishead Line

Discussions are ongoing between Bristol Port and Network Rail on the constructability programme for the Portishead Line and it would be premature and indeed unhelpful for the West of England Combined Authority to intercede at this point.

4. Henbury Loop

The West of England Combined Authority has no plans to undertake any further work on extending services on the Henbury Line. The focus remains on delivering MetroWest Phase 2 with hourly services to a new Henbury station plus new stations at North Filton and Ashley Down and half hourly services to Yate with a possible extension to Gloucester.

5. Thornbury Line

As the Joint Transport Study draft final report concludes there is no realistic prospect of introducing new rail services to Thornbury there are no plans to undertake any further work. The Study considers that the proposed introduction of MetroBus will be a more effective means of connecting Thornbury to the North Fringe and Bristol.

Appendix B: Public Forum: Statements

	Name, organisation
Item 1	David Redgewell, South West Transport Network, TSSA and Director of Bus Users (UK) <i>West of England Transport Issues</i>
Item 2	David Redgewell, South West Transport Network, TSSA and Director of Bus Users (UK) <i>West of England Transport Issues</i>
Item 3	Cllr Lin Patterson, Bath & East North Somerset Council Save our 6-7 Bus Campaign based in North East Bath.
Item 4	Christina Biggs, Friends of Suburban Bristol Railway <i>A reaction to Joint Transport Study September 2017</i>

Statement 1
David Redgwell

If we are to proceed with a mass transit scheme we need to make sure the plans are realistic. The Light Rail Transit Association (Tram Forward) could advise on this as they have been involved in the Westway study and cut and cover tunnels such as those at Newcastle Upon Tyne and Hannover. I myself have been involved in the Trans-Clyde project in Glasgow but we must stay focused on MetroBus, MetroRail delivery and Better Bus A38 North to Thornbury and A370 to Weston-Super-Mare.

Other stakeholders could include RMT, TSSA, ASLEF, Unite, Network Rail, First Group, MTR and Stagecoach and a number of rail engineering firms. We must make sure that any mass transit scheme is fully integrated with MetroWest Phases 1 & 2 to Portishead, Bath and Gloucester including the Henbury loop. It should hub and spoke at Temple Meads and Broadmead.

Of course at Temple Meads we are dealing with a Grade 1* listed building and a number of important heritage buildings including the George and Railway, Grosvenor hotel and Cattle Market Tavern.

In East Bristol we are looking at coal mine shafts as well as the River's Frome and Avon in Bristol and Bath.

We should be looking at the Midland Railway corridor between Bristol and Bath, North Somerset Railway to Brislington with a link to the new Hengrove housing estate and the new Bath tramway scheme as well as the Bristol Airport tram/train link on the A38 with a potential conversion of the South Bristol link road to include a tramway.

We must continue to fund disability access and station improvements.

Regards
DAVID R

Statement 2

David Redgewell

West of England Transport

SWTN, Railfuture and Bus Users UK are very concerned about cutbacks to the electrification programme to Chippenham with no date for completion to Bristol via Bath or Filton Bank. The lack of investment in Temple Meads apart from 2 platforms for alteration within the IEP programme, the stopping of works at Lawrence Hill bridge and station, the lack of progress on platform extensions at Bath Spa, lack of a step free access programme at Stapleton Road, Lawrence Hill, Nailsea and Weston-Super-Mare (on hold until 2019).

At Temple Meads it is important that the new Station Street is built for good access to the new Temple Quarter University Campus and that the heritage buildings (including the Cattle Market Tavern) are protected.

It is very important that we continue with the Metro-West project

Concerns over the lack of progress on funding for East Junction, lack of scope for rolling stock from the Thames Valley and the loss of 9 units to Centro in May 2017 we need a clear rolling stock policy for the Greater Bristol area including the 11-15 HST's. The interface with South West Trains and how these projects fit in with Metro-West phases 1 & 2.

The new station site does not provide a transport interchange as suggested by Railfuture, TFGBA, Friends of Suburban Bristol Railways and the four rail unions. The new siting of Filton North station doesn't interchange with MetroBus, the A38 showcase bus routes to Thornbury and Patchway nor with bus route 18 to EmersonsGreen/Southmead Hospital and Avonmouth and route 82 to Yate.

We ask the WECA to reconsider the Filton North station site as this was rebuilt only a few years ago. Clearly the plan needs to link with the rail service through Henbury North to Avonmouth and Severn Beach and the new Cribbs Causeway development whatever that plan may be following the planning inspectors report.

We expect the plan to be fully designed with bus stops, shelters and raised kerbs and mobility impaired pavements and services including the public realm strategy included in interchanges.

We want MetroWest Phase 2 (Henbury loop) and the Gloucester line to be progressed as a top priority for WECA, Bristol Mayor and the Metro Mayor including Ashley Down, Charfield, Stonehouse stations and improvements at Gloucester.

The Henbury loop should have stations at Filton North, Henbury for Cribbs Causeway, Portway Park and Ride and improvements at Avonmouth. Our top priority is to see the Portishead railway line reopened for 100 million pounds including stations at Portishead and Pill protecting the site at Ashton Gate.

We need value engineering at Network Rail and these projects must be submitted for CP6. Saltford, St Annes and Corsham should be looked at as part of the study by Bristol City Council. WECA and the Metro Mayor should make a submission to Government for extra funding.

It should be noted that Lawrence Hill, Stapleton Road, Patchway, Pilning, Nailsea and Backwell and Parson Street are not disabled accessible, nor is Weston Super Mare and Cheltenham is without lifts.

On integration, we are very concerned after discussions between Transport Focus and First Group (RAIL and BUS Divisions) and Network Rail over bus/rail ferry integration at Temple Meads within the Temple Quarter Enterprise Zone scheme. We note that Cambridge North station is fully integrated with local and MetroBus unlike Bedminster at present.

Integration should be at the heart of what WECA does.

The project has the support of Chris Grayling and Jeremy Corbyn nationally.

David Redgewell South West Transport Network, TSSA and Director of Bus Users (UK)

Statement 3
Cllr Linda Patterson

Dear WECA,

Please could you register me to speak at the beginning of your meeting this Friday? It should be less than 5 minutes. I wish to represent the Save Our 6-7 Bus campaign based in north east Bath.

Please confirm.

Many thanks,

B&NES Councillor Lin Patterson
(Green) Lambridge

A Reaction to Joint Transport Study September 2017: FOSBR welcome the determination of WECA to proceed with developing transport studies, but would challenge the assumption that the first of the schemes to be advanced should be MetroBus, Park and Ride and road bypass schemes.

1. MetroBus: We are alarmed at the proposed rolling-out of the MetroBus schemes to Thornbury, Severnside and Keynsham, when there are rail schemes in place for each of these destinations. We question the safety of the MetroBuses in the guided busways, especially when entering the flanges and mounting steep and curved bridges such as the one at Ashton Vale.

2. Rail element: We note that this study claims to have ambition and yet is only suggesting the same six new rail stations proposed in the December 2016 pre-consultation draft, and that the September 2017 version is explicitly excluding two rail schemes (Henbury Loop and the Thornbury Line) which are the most inspiring to the public.

3. Henbury Loop We are disappointed that the JTS has not challenged in any way the CH2MHill report in 2015 that was so damning of the Henbury Loop. FOSBR has in the past made several suggestions to address the perceived problems with the Henbury Loop, such as an idea to extend the route to reverse at Bristol Parkway, as this would complete it to clock-face. We would also want WECA to challenge the Port study £128m figure for creating a rail cutting at St Andrew's Gate level crossing, and would urge WECA to investigate alternatives such as a bridge at St Andrew's Rd Station north of the conveyor belt silo. Finally we note that Severnside industrial development is growing fast, and should give a better business case for the Henbury Loop, especially if opening a station at Chittinging.

4. Portishead Line We would like to participate in the re-scoping discussions on Portishead line, chiefly our idea of implementing our proposal for long weekend closures, given the present lack of use by Portbury Dock of their purchased freight paths. We are presenting data today that shows that the Port make very little use of their purchased freight paths and that principally the trains have been running on Tuesdays and Thursdays. If the weekend closures for works to the line were from Friday to Monday this would double the length of time during the line closures, and more than halve the number of weekend closures needed.

5. FOSBR Rail Manifesto 2017 and MetroWest Phase 3 ideas – we commend these to WECA, especially the key idea of interchange between rail and standard bus, by using painted bus 24 hour continuous lanes. We commend three other plans: the Mayoral Rail Manifesto 2016, the Good Transport Plan and our own Suggestions for the Great Western Franchise (attached).

6. FOSBR Request: We would therefore like to have meaningful discussions with WECA elected members and officers, Network Rail and GWR representatives, to obtain feedback on our FOSBR Rail Manifesto 2017 and for us to challenge the Joint Transport Study 2017 proposals, notably the refusal to develop major rail schemes such as the Henbury Loop and Thornbury Line. We also have suggestions for improving the current MetroWest Phase 1 and Phase 2 business cases.

7. To this end we have booked a room at City Hall, Bristol, on Weds 4 October from 10.30am-12noon. We would like to invite WECA officers and elected members to meet FOSBR members where WECA can give us verbal feedback on the ideas in our FOSBR Rail Manifesto 2017 and respond to our challenges to the Joint Transport Study Final Report September 2017.

B Notes on specifics

1. Proposals at WECA Extraordinary Meeting Friday 15 Sept

a. Staffing: We note the proposal to engage Patricia Greer for £150kpa as Chief Executive. We welcome the initiative to engage staff for WECA but would ask qualified transport professionals should be engaged so as to reduce reliance on CH2MHill.

b. Rail element: We commend the suggestion of reopening Charfield and making improvements to Yate and Keynsham stations, but would suggest that WECA should start by maximising use of the existing 28 suburban railway stations, principally by enhancing **rail-bus interchange** – such as providing real time bus and train information at station and bus level for Lawrence Hill, Parson St and Clifton Down.

2. Specific schemes commended by FOSBR in FOSBR Rail Manifesto and MetroWest Phase 3.

a. Pilning: FOSBR notes that Network Rail have not replaced the footbridge removed in October 2017 and that this represented a very modest saving (£658,000); that Network Rail are now saying that a GRIP process costing the taxpayer £3-£5m will be necessary to replace the footbridge whether like-for-like (£1,064,000) or Equalities compliant (more than £2m). FOSBR argue that a GRIP process should not be necessary to replace the footbridge as this only removed in October 2016, and we continue to assert that Network Rail should fund this out of the savings from the delay in electrification to Temple Meads. Failing this, we consider that replacing the footbridge and providing adequate lighting would present a very modest first step by WECA as part of the new devolution deal to unlock the potential of this strategically located station which is both near to the proposed M49 junction and also 8 minutes away by road from Cribbs Causeway as well as cycling distance to Severnside employment. If the footbridge is replaced then a trial daily service can be instigated.

b. N Filton Station location: We also comment on the proposed relocation of the N Filton station 400m to the west as this will effectively dissuade use of this station by students and lecturers at SGS College Filton and a Park and Ride for the A38 commuters.

c. Park and Ride should be on rail not on bus: We wish to urge WECA to develop a coherent strategy for Park and Ride which uses rail stations for rapid transit (not just bus links) and a rail-bus interchange approach (such as at Filton Abbey Wood) which maximises use of the existing rail network. We also note the need for adequate disabled access for Patchway, Stapleton Rd and Lawrence Hill.

d. Thornbury – The proposed scheme of a MetroBus to Thornbury should not be advanced simply to rescue the MetroBus project, but to give Thornbury residents a meaningful transit time to the centre of Bristol. We suggest that reopening the Thornbury Line is a suitably ambitious scheme for MetroWest Phase 3 (to parallel the Portishead and Henbury lines for Phase 1 and 2 respectively) which would give transit times of well under an hour – if the MetroBus scheme to Thornbury is simply an add-on to the Aztec West branch, the necessary pinch-points on villages along the A38 would introduce delays not much better than with the existing bus.

We propose that the Thornbury rail station site at Grosvenor Road is optimal as it is adjacent to the majority of existing and proposed railway development and has an attractive prospect and entrance to the town. We have visited both rail tunnels under the A38 and M5 and can confirm they are in good condition. Rail capacity is much less an issue on a branch line and could eliminate the need for a turnback at Yate. The fourth platform at Bristol Parkway should also help with capacity at Westerleigh Junction, and recent advances in signalling technology should solve remaining capacity issues.

Friends of Suburban Bristol Railways (FOSBR)

Suggestions for MetroWest Phase 3



To serve as a detailed proposal for the Enhanced MetroWest option from West of England (WEP) Joint Transport Study, and the Rail component of the West of England Devolution Deal March 2016; informed by FOSBR Jan 2016 Rail Map survey (800 respondents).

MetroWest Phase 3 Executive summary:

- **Reopen stations at Ashton Gate, Charfield, Coalpit Heath, St Anne's, Chittening, Salford, Corsham and Uphill, plus Park and Ride stations at Portway and Portbury.**
- **Extend local services to serve these new stations: Henbury Loop plus Clifton Down return; Weston super Mare to Chippenham via Corsham; Portishead to Cheltenham.**
- **Promotion of rail-bus interchange so that there is complete coverage of the West of England area for commuters wishing to travel to work by public transport.**
- **Station upgrades to include better waiting facilities, disabled access and CCTV.**

Introduction: MetroWest Phase 1 and 2 are together an exciting £100m local rail package, already funded under the City Deal and proceeding through GRIP stage 3. Phase 1 consists of reopening the Portishead Line (and reopening stations at Portishead and Pill) and hiring 6-7 extra trainsets to provide a half-hour clockface service from Bristol Temple Meads to Portishead, Avonmouth and Bath, with two of these being through trains. MetroWest Phase 2 consists of reopening Ashley Hill, North Filton and Henbury and hiring 2-3 trainsets to provide an hourly service to Henbury and an extra return service from Temple Meads to Yate or Gloucester.

This proposal also draws on the principles of the **Good Transport Plan for Bristol** by linking this rail backbone to other forms of sustainable transport, and suggests that this would give the commuters of the travel-to-work area a viable alternative to the private car and therefore deliver a permanent and significant reduction of the current critical-path road congestion.

Notes:

1. Governance: For this comprehensive MetroWest to be effectively delivered, the Combined Authority arrangements should have a transparent and publicly accountable governance, with a team of transport planners to consult the public and stakeholders on developing a region-wide and ambitious sustainable transport strategy and to develop links with employers and schools to improve Bristol's transport options and reduce air pollution. Develop funding streams such as a workplace parking levy on car commuting.

2. Rail-Bus interchange: As rail cannot reach every community, make sure bus services call at local train stations, and provide signage to help passengers plan an integrated journey.

3. Suggested new train services for Phase 3:

Henbury Loop linking to a Clifton Down return journey (using Clifton Down turnback) – this solves the time wastage involved in the of the 63 minute Henbury Loop trip and gives a more frequent service to Clifton Down;

Weston super Mare to Chippenham – to serve St Anne's Park, Salford and Corsham. This would avoid the need for a Bathampton turnback;

Portishead to Cheltenham via Yate and Gloucester (extension of the proposed Phase 2 service) – serving Coalpit Heath and Charfield - this uses the Filton Bank to allow fast trains to pass slow trains so no need for a loop at Coalpit Heath;

Commuter trains (initially peak-only and/or request) to serve Pilning, which would also provide a better service to and beyond Severn Tunnel Junction, using the passing loop at Pilning if necessary.

Uphill station could be served by Cross-Country trains and/or a local service round the Weston Loop. The service would depend on the location – whether Uphill itself, Uphill Junction or Locking.

B Specific schemes:

1. Completion of Henbury Loop

Network Rail are making this line suitable for passenger train diversions (“passengerisation”), which means there is no reason why a Loop service cannot be instigated during rail Control Period 6 (2019-2024). The infrastructure that would be needed to include Bristol Parkway should be investigated. The growing need for Severnside employee commuting should also be addressed by considering service enhancements to both Severn Beach and Pilning, as Pilning would have no implications for Port access.

2. Service and station upgrades:

- Interchange hubs (including Park and Ride) connecting rail, bus, taxi, cycling and ferry routes;
- Rail and bus timetables to fit with each other and with working shift patterns;
- Extra rail services to Severn Beach Station at shift change times, in addition to the hourly service proposed by MetroWest Phase 1;
- Pilning station must not be closed: Services should be restored as a trial request stop for workers in Severnside, and to enable commuting from the Thornbury area;
- More rail-bus connections to serve Bristol Airport from stations such as Nailsea and Backwell;
- Filton Abbey Wood as rail-bus interchange for Southmead Hospital and Horfield;
- Temple Meads spatial development including rail-bus interchange on the Friary, taxi access, and access for bus services to and from South Bristol at the rear;
- Other rail-bus interchanges: Avonmouth, Pilning and Severn Beach for Severnside; Henbury for Cribbs Causeway; Bristol Parkway, Park and Ride at Portbury and Portway, and a Park and Ride at Pilning to serve both east and west-bound commuters should an M49 junction be completed;
- Full disabled access to all stations, including CCTV and waiting shelter facilities;
- Freight: realistic assessment of necessary train path frequencies so as not to inhibit planning for passenger routes that share freight lines (such as Portishead and the Henbury Loop). Reopen discussions with Port of Bristol on provision of 24-hour road freight access (eg bridge) to Port.

3. Station reopenings (in alphabetical order):

Ashton Gate on the Portishead line, to serve the Stadium both for sports events and the proposed weekday conferences, Ashton Court events, the Winterstoke shopping outlets and car workshops, Spike Island and Hotwells residents; to connect to a MetroBus stop.

Charfield, which is favoured by S Glos to serve towns such as Wootton-Under-Edge and Thornbury;

Chittening: the previous site is on a National Cycle Network stub and is accessible to industrial estates both to the north (by public right of way) and south (via the cycle underbridge) of the station site. Station stopping patterns and connecting shuttle bus to be timed for workers' shift patterns;

Coalpit Heath (to serve Winterbourne and Emerson's Green);

Corsham, a long-term aspiraton of Wiltshire County Council;

Saltford, as promoted by the current station reopening campaign;

St Anne's, a more recent campaign to serve this urban area on the badly congested A4.

Uphill, to serve Weston General Hospital and Weston College; optimum location to be determined.

4. Further phases: Rebuilding lines to Thornbury and/or Clevedon; light rail for selected new routes; electrification of the MetroWest network, subject to technological advances such as battery trains.



**Transport for
Greater Bristol
Alliance**
Campaigning for
Integrated Transport



Mayoral Candidate Public Transport Pledge April 2016

We the candidates for the Mayor of Bristol pledge to bring about a cleaner and less congested city of Greater Bristol, by basing our transport policies on the themes of the Good Transport Plan, and ensure that the majority of transport funding via devolution is dedicated to sustainable transport and local greener streets.

1. **Governance:** Make sure any proposed West of England arrangements have a transparent and publicly accountable governance, with a team of transport planners to consult the public and stakeholders on developing a region-wide and ambitious sustainable transport strategy and to develop links with employers and schools to improve Bristol's transport options and reduce air pollution. Develop funding streams such as a workplace parking levy on car commuting.

2. **Rail:** Make sure MetroWest Phase 1 (Portishead and half-hour "Unite the City" through services between Portishead, Severn Beach and Bath) is prioritised and delivered to the current schedule – making sure Network Rail keeps Filton Bank four-tracking to schedule, delivers the remodelling of Bristol East Junction and the proposed "passengerisation" of the Henbury Loop to deliver a minimum of a half-hour service to all current West of England stations. Immediately plan for future MetroWest phases.

3. **Bus strategy:** Deliver a bus network that serves the whole city in a systematic and logical way, with smart ticketing, radial and orbital and suburban feeder routes, and with a frequent and reliable service. Safeguard and extend bus lanes (especially in the city centre) to increase passenger confidence for the daily journey.

4. **Rail-Bus interchange:** Promote a Temple Meads Spatial Plan including the proposed passenger tunnel through to the Arena and an integrated rail-bus interchange on Friary. Investigate the development of rail-bus interchanges such as at Filton Abbey Wood and Nailsea and Backwell.

5. **A fair deal for taxi drivers:** Representation on the planning team; permission to use bus lanes; fair licencing; a disabled taxi-card scheme.

6. **Bristol Centre.** Celebrate this beautiful city by developing the Floating Harbour as a focal point, and create an iconic city centre free of unnecessary through traffic, pleasant and safe and easily navigable for cyclists and walkers of all ages.

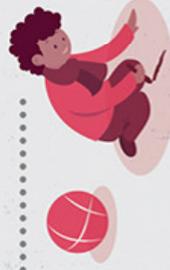
Signed, the Mayoral candidates:

What we could achieve together



What we want to achieve

See a **significant increase** in the number of people using **public transport**



Reprioritise the city centre for **walking and cycling**, developing **major new routes** that help to link different parts of the city



Strengthen **local communities** through **innovative street design** that puts neighbourhoods and its **residents first**



Enable **all children** to have the option to **walk, scoot or cycle** to school and **play outdoors** where they live

What we want to achieve

In the next 5 to 10 years we could:



See a growing proportion of **vehicles** on our roads that use **ultra low emission technology**

Develop and secure funding for a **clear, ambitious and deliverable plan** to achieve step-change in our **public transport infrastructure** and **walking and cycling networks** over the next 50 years

Halt and reverse air pollution caused by transport in our city and become a **European leader in air quality**



Create **pedestrianised areas** across the city centre with **open and dynamic spaces** for retailers that will help to ensure **economic vitality**



Double the number of people **walking or cycling** for **everyday journeys under 5 miles**



Increase the number of businesses who use **freight consolidation centres**



See the majority of people **walking, cycling** or using **public transport** for their **journeys to work**

Create a city where everyone embraces and celebrates the **culture of sustainable travel** and which sees **walking, cycling and public transport** use as the norm for the majority of journeys

OBJECTIVE #6

Empower communities to help redesign residential spaces that work for everyone



OBJECTIVE #5

Reduce through traffic in the city centre to create a high quality, people-centred environment



OBJECTIVE #2

Implement a comprehensive and high quality walking and cycling network, making door-to-door journeys by foot and bike a reality



OBJECTIVE #1

Create a flexible, reliable and affordable public transport system that is integrated, simple to use and gets you from A to B on time



OBJECTIVE #8

Give children the opportunity to walk, scoot or cycle and play outdoors improving their health and wellbeing



A Good Transport Plan FOR BRISTOL

OBJECTIVE #3

Increase the proportion of all low emission or shared vehicles on our roads and establish accessible refuelling points across the city



OBJECTIVE #9

Change the way that we travel as a city and show that sustainable and active travel can be easy and enjoyable for everyone in Bristol



OBJECTIVE #4

Continue improving the coordination and consolidation of deliveries to reduce the number of heavy goods vehicles on our roads and improve safety for all road users



OBJECTIVE #7

Give employees the flexibility and facilities to work from home and travel sustainably



Suggestions for Great Western Franchise 2020



Improving passenger experience and ease of use:

1. Minimise the number of Severn Beach trains making unscheduled turn-backs at Avonmouth and provision of alternative transport (such as taxi or minibus) when these turnbacks are made:
2. Guards on all trains for safety and passenger information (such as advising on buses and contacting taxis in case of cancellations and turn-backs);
3. Revenue collection – make sure the ticket machines are maintained and upgraded to prevent them malfunctioning;
4. Smart-card ticketing to include Oyster-style “carnet” pricing where people can buy 10 or 20 journeys with no restriction on having to spend them within the week or month;
5. Disabled access at Stapleton Rd, Lawrence Hill, Parson St and Patchway;
6. Provision for cycling – need for adequate cycle space on trains and number of carriages at peak times. Improved bike stand provision, starting at stations where demand is highest, such Redland, Montpellier, Oldfield Park, Stapleton Road, Clifton Down, Filton Abbeywood and Temple Meads. Cycle lockers should be provided at more isolated stations such as Filton Abbeywood and Stapleton Road.
7. Accessibility - as a minimum the franchise holder should be required to conduct an accessibility audit of all local stations and produce an action plan to resolve issues;
8. Provision of adequate station waiting facilities - this is needed at most local stations but is a particular problem at Yate, Clifton Down, Montpellier, Stapleton Road, Worle, Nailsea, and Oldfield Park.

Rail-bus interchange:

9. Real-time and timetable signage information about both bus and rail timetables at both rail stations and bus stops, such as at Clifton Down, Lawrence Hill, Parson St and Stapleton Rd; well positioned bus stops adjacent and within sight of stations together with multimodal ticketing, signage and information to promote easy transfer between trains and buses.
10. Signs to enable modal interchanging and facilitate journeys, working with bus operators and the community to ensure each station is well signed from major/adjacent roads to all points of access. Signs at stations should clearly guide passengers to near-by bus services and amenities. Signs at bus stops or train stations should say where passengers might travel to, for example 'alight here for buses to Fishponds and Staple Hill'
11. Train timetables should also be placed at the entrance to stations or on nearby roads to encourage 'passing trade'. For example, timetables on the pavement on Lawrence Hill road... Station Road (by Gloucester Road arches) and Cromwell Road (Montpelier), "
12. Responsibility to develop bus-rail interchanges with WECA, bus companies, etc. including at Filton Abbeywood, Lawrence Hill, Stapleton Road, Temple Meads, Bedminster (at junction of Bedminster Down Rd and West St), Parson Street (we support the proposal to route the Airport bus via Parson St), and Keynsham.

Timetabling new services:

13. Supporting delivery of MetroWest Phase 1 and 2, and planning for future phases of MetroWest, such as rail plans in the WECA Joint Transport Study and our own suggestions for MetroWest Phase 3.
14. Completing a 30 minute frequency to all currently operational stations not already in MetroWest Phase 1A or Phase 2, such as Bedminster and Parson St and Patchway, through additional stops on existing services;
15. A twenty or fifteen minute frequency peak commuter service for Temple Meads to Clifton Down;
16. Replacing the footbridge at Pilning and trialling a daily commuter service stopping at 07:52, with a return service in the early evening,

initially in the eastbound direction until the footbridge is replaced. In the meantime, Pilning 3rd stopping train on Sat afternoon sometime between 3:30pm and 5:30pm, and providing platform 1 lighting to enable this service to be used in the winter, and reinstating Pilning to the stations column of their online and printed timetables.

17. Reversing trains at Chippenham rather than Bathampton, to allow Corsham Station to be reopened. Trialling a twice-daily additional service from Chippenham to Bristol, stopping at Corsham, to arrive at Bristol between the current arrivals of 07:10 and 08:17, with a last train from Bristol to Chippenham no earlier than 23:00.
18. Futureproofing platforms and rolling stock on the Severn Beach Line, to enable 5-car trains to be used when needed, by ensuring selective door opening and through-train access on the trains and a plan for lighting the platforms for the full 5-car length as demand increases.
19. Restoration of scheduled stops at St Andrews Road, Lawrence Hill and Sea Mills on Severn Beach line;
20. Extension of Severn Beach line commuter services: we request that the 08.03 from Temple Meads and either the 16.03 or 16.35 from Temple Meads run through to Severn Beach instead of turning back at Avonmouth. This would give an hourly peak service to Severn Beach.
21. Plugging the gaps in the Severn Beach Line evening timetable - currently there is 93 minutes (109 minutes on Saturday) between the arrivals at Bristol Temple Meads at 20:34 (from Avonmouth) (20:26 from Severn Beach on Saturday) and 22:07 (22:09 on Saturday) (from Severn Beach); later last train from Temple Meads to Severn Beach.
22. Half hourly services between Filton Abbeywood and Stapleton Road/Lawrence Hill on Saturdays and Sundays (currently only on weekdays), and improving connections with the Severn Beach line, which are currently poor especially on Sundays. "Unite the City" local through services (eg Bristol Parkway direct to Parson St when the football is on) that minimise the need to change at Temple Meads or minimise connection times at Temple Meads;

FOSBR Rail Manifesto 2017

FOSBR calls on the West of England Combined Authority, our MPs and councillors to secure funding for the following projects for Network Rail to deliver within Control Period 6 (2019-2024):

- four-tracking of Filton Bank and remodelling of Bristol East Junction;
- cross-regional plan for Park and Ride, prioritising Portway P&R;
- MetroWest Phase 1 to Portishead via Pill and a half-hour service from Avonmouth to Bath, as these are long overdue and urgently needed;
- MetroWest Phase 2 to Henbury, Yate and Gloucester via Ashley Hill;
- electrification to Bristol Temple Meads via Filton and Bath;
- Temple Meads Spatial Plan to include Station Street as a minimum;
- redeveloping and regenerating suburban stations for best use of land.

We also press WECA and the constituent local authorities to make sure the following is included in the Great Western Franchise 2020—2027/2030:

- maximising use of the existing local rail network by optimising public access to all local stations (disabled access, local signposting and cycle storage at stations and on trains, rail-bus interchange, shelter);
- multi-modal smart ticketing, with guards for safety on all trains;
- improve the timetable to complete a 30 minute service to currently ill-served local stations such as Parson St, Bedminster and Patchway;
- ensuring that the Phase 1 hourly service to Severn Beach is reliable;
- increasing service frequency to 20 or 15 minutes according to passenger demand, by providing passing loops such as at Sea Mills;
- replace the footbridge at Pilning to permit a meaningful commuter service, starting with a trial daily commuter service to build the business case for a Park and Ride serving the M49.

In the longer term, we also urge WECA to make sure the following are included in the Joint Spatial Plan (JSP) and Joint Transport Study, and that these elements are funded by the 30-year devolution deal as a priority:

- JSP stations Horfield, St Anne's, Salford, Ashton Gate & Charfield;
- Completion of Henbury Loop and double-tracking Severn Beach Line;
- Adding FOSBR MetroWest Phase 3 proposals for five further stations at Coalpit Heath, Chittening, Uphill/Locking, Corsham & Long Ashton;
- electrification of local lines using hybrid or battery trains;
- extending the Tytherington freight line to Thornbury.



ITEM: 7

**REPORT TO: WEST OF ENGLAND COMBINED AUTHORITY OVERVIEW
AND SCRUTINY COMMITTEE**

DATE: 24th October 2017

REPORT TITLE: DRAFT WEST OF ENGLAND JOINT SPATIAL PLAN

AUTHOR: LAURA AMBLER, WEST OF ENGLAND COMBINED AUTHORITY

Purpose of Report

- 1.1 To present the publication version of the West of England Joint Spatial Plan (JSP) to the Scrutiny Committee for their views which will be reported to the Joint Committee when they consider the publication version JSP at their meeting on 30th October 2017.
- 1.2 An extraordinary meeting of the Scrutiny Committee is being held in public on 24th October after despatch of the papers to the Joint Committee on the 20th October. At this meeting the Committee has the opportunity to consider the publication version JSP.

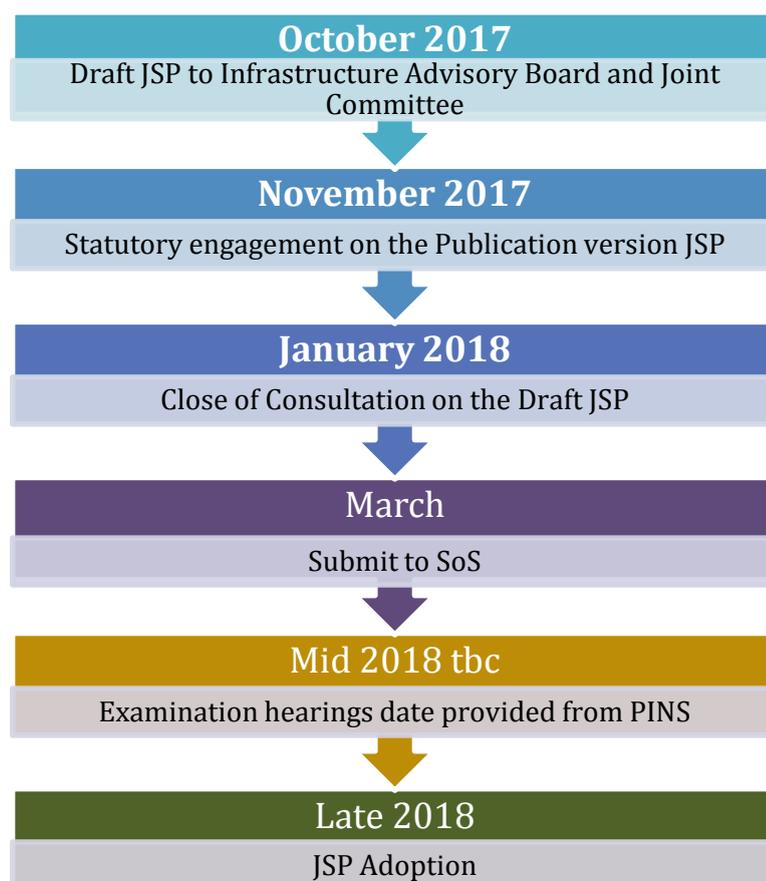
Issues for Consideration

Background

- 2.1 The West of England faces a significant strategic challenge; to accommodate and deliver much needed new homes and jobs properly supported by infrastructure, to create attractive places while maintaining the environmental assets and quality of life unique to our area.
- 2.2 The Joint Spatial Plan (JSP) will address these challenges in a coordinated approach, outlining the housing and employment requirement of the West of England for the period 2016-2036. The document will provide the joint framework to ensure that development requirements are brought forward consistently across the West of England authorities.
- 2.3 This coordination with regards to strategic planning matters is complemented by the approach to address strategic transport issues through the Joint Transport Study (JTS). The JTS has informed the JSP by outlining future strategic transport

proposals for delivery up to 2036 that address current challenges on the network and inform future development proposals in this plan.

- 2.4 Preparation of the JSP has entailed consultation under regulation 18 of the Town and Country Planning (Local Planning) Regulations 2012, through the 'Issues and Options' and 'Towards the Emerging Spatial Plan' consultation stages. These consultation documents and supporting technical information are available for public viewing on www.jointplanningwofe.org.uk
- 2.5 The next statutory engagement on the JSP will be on the Publication version of the JSP under regulation 19 of the Town and Country Planning (Local Planning) Regulations 2012.
- 2.6 The proposed engagement period will be from the 22nd November 2017 to the 10th January 2018. If the plan is ready, subject to any minor modifications, the Plan will then be submitted to the Secretary of State under regulation 22 of the Town and Country Planning (Local Planning) Regulations 2012, in March 2018 for a proposed Examination in Public (EiP) mid-2018. Following the examination and consideration of the Inspector's report, the plan will be adopted by the four Authorities. Once adopted, the JSP will become a statutory Development Plan Document and will guide the four Councils in the development of their Local Plans.



- 2.7 Members of the West of England Scrutiny Committee received an update on the JSP and the key issues it will need to address at its meeting on 27th September. The views expressed at that meeting have informed the Publication version draft JSP.

The Joint Spatial Plan:

- 2.8 The Publication version Joint Spatial Plan document and appropriate supporting documents will be published with papers to the Joint Committee on the 20th October 2017. Further technical documents will be produced and made available during the consultation stage to support this document.

Scope

- 2.9 The JSP is a strategic level Development Plan Document that will form the strategic policy context for individual Local Plans prepared by the four authorities. The JSP will be a statutory document and will therefore need to be prepared in accordance with statute, local plan regulations and national policy to ensure it is a 'sound' document supported by technical evidence.
- 2.10 The scope of the JSP, with its supporting evidence base, is focused on: identifying the number of new market and affordable homes and amount of employment land needed across the West of England from 2016-2036; identifying the most appropriate spatial strategy and strategic locations for growth; and, outlining the strategic transport and other infrastructure required to support sustainable growth.

Key Issues

- 3.1 Previous stages of the Plan's preparation included public consultation on the key issues and challenges that should be addressed. The comments received have been considered and used to inform the Draft Plan's critical issues and strategic priorities. Key issues of which the JSP has needed to address include:
- Identifying housing and employment need.
 - Affordable housing delivery.
 - Quality of homes and place and communities.
 - Infrastructure to support growth.
- 3.2 In addressing these key issues, the draft Plan document outlines the following critical issues and strategic priorities:

Critical Issue	Strategic Priority
There is a critical need to substantially boost the housing supply, particularly affordable housing of which the need is acute across the Plan area.	1. To meet the sub-region's identified housing needs, in a sustainable way. In particular to make a substantial step change in the supply of affordable housing across the plan area.

<p>Economic prosperity has brought substantial benefits to residents, communities & the environment. However, prosperity has not been shared equally by all communities as there are pockets of deprivation within the sub region.</p>	<p>2. To pursue inclusive economic growth by accommodating the economic growth objectives of the LEP Strategic Economic Plan. Particularly to:</p> <ul style="list-style-type: none"> • promote the growth of existing employment centres such as the Enterprise Zones and Enterprise Areas • ensure more inclusive growth and life chances for all, across the West of England, and improve accessibility to jobs.
<p>The form and function of development in some parts of the West of England has resulted in significant pressure on infrastructure and settlement patterns which are over-reliant on the private car.</p> <p>This inhibits wealth creation and productivity and contributes to climate change and poor health.</p>	<p>3. To deliver a spatial strategy which;</p> <ul style="list-style-type: none"> • focuses on three primary centres of Bristol, Bath and Weston-super-Mare and recognises the complementary role of market towns to achieve sustainable growth. • ensures that new development is properly aligned with infrastructure and maximises opportunities for sustainable and active travel. • through a place making approach promotes places of density and scale with a range of facilities and which encourages health lifestyles and cultural wellbeing. • integrates high quality, multi-functional green infrastructure. Reduces greenhouse gas emissions and ensure resilience to the impacts of climate change.
<p>The sub-region benefits from a world class environment. This brings substantial economic and community benefits and contributes significantly to the quality of life of residents, visitors and businesses.</p>	<p>4. To protect and enhance the sub-region's diverse and high quality natural, built and historic environment and secure a net gain in biodiversity.</p> <p>To prioritise development on brown field locations, optimise densities and retain the overall function of the Bristol and Bath Green Belt.</p>

Policy Framework

3.3 The Policy framework in the JSP addresses the critical issues and strategic priorities. In summary the policy framework is as follows:

3.4 Policy 1: Housing Requirement:

The JSP sets out the housing need for the period of 2016-2036. The housing provision for the JSP includes a flexibility in supply to ensure the delivery of the

housing need. A contingency supply is also identified for consideration as part of plan review should further capacity be required in the future. The mechanism to release any contingency is a plan review at the five year review period. The policy establishes the distribution between the unitary authority areas based on the spatial strategy (outlined within policy 2).

3.5 Policy 2: Spatial Strategy:

This policy sets out the spatial strategy and the justification underlying the choice of locations for identifying how the JSP housing and job requirements will be delivered across the West of England. The strategy is depicted on the Key Diagram. The Reasoned Justification to this Policy provides the basis by which the JSP has established the exceptional circumstances to some proposed amendments to the general extent of the Bristol and Bath Green Belt to sustainably accommodate the growth required over the plan period.

3.6 Policy 3: Affordable Housing Target: There is a critical need to deliver the affordable housing needs for the West of England. The Policy sets the Affordable Housing Target and the framework to boost the delivery of Affordable Housing across the West of England from 2016-2036.

3.7 Policy 4: Employment land requirement: This policy sets out the overall West of England jobs requirement and identifies key strategic employment locations including:

- a. Existing and strategic town centres
 - b. Enterprise Zones and Areas
 - c. Key strategic infrastructure employment locations
- Additional employment land (floor space and ha) provision will also be identified at strategic development locations.

3.8 Policy 5: Place making principles: This policy sets out the strategic principles to ensure the delivery of high quality and sustainable new development incorporating multi-functional place making principles. These principles will be taken forward and refined through Local Plans and supporting Supplementary Planning Documents/masterplans.

3.9 Policy 6: Strategic Infrastructure: The delivery of new homes through the JSP has an impact on the strategic infrastructure requirements for the West of England. The growth provided through the JSP will add to historic pressures on infrastructure namely transport. The JSP will ensure new development is properly aligned with infrastructure. This policy identifies the strategic infrastructure required to deliver the JSP growth elements. This will reflect the JSP Key Diagram and the supporting Infrastructure Delivery Programme.

3.10 Policy 7: Strategic development locations (SDL): This policy sets out the specific policy requirements for each of the proposed SDLs. These locations will not be allocated through the JSP it will be the role of the new Local Plans prepared by individual authorities to make the allocations for the SDLs and provide delivery guidance.

Duty to Cooperate

- 4.1 The 5 authorities of the West of England; Bath & Northeast Somerset Council, Bristol City Council, North Somerset Council, South Gloucestershire Council and the West of England Combined Authority are committed to work collaboratively through a plan-led approach. Engagement with neighbouring authorities has been ongoing. This is consistent with the Government's core planning principles and the Duty to Cooperate (DtC). By preparing the JSP the 4 authorities are ensuring full compliance with the DtC.

Risk Management/Assessment

- 4.2 There are no direct risks arising from this report.

Public Sector Equality Duties

- 4.3 Feedback will continue to be sought from affected communities and statutory consultees to meet the authorities' duties under the Equality Act 2010 as the Plan progresses through the statutory plan making process. An Equality Impact Assessment of the JSP will be submitted along with the Plan.

Economic Impact Assessment

- 4.4 The JSP seeks necessary infrastructure to support suitable economic growth. Should this infrastructure not be delivered in a timely way this will act as a significant constraint on the productivity of the local economy and constrain future growth.

Finance Implications

- 4.5 There are no financial implications arising directly from this report. The Examination in Public costs are included within existing project budget arrangements.

Legal Implications

- 4.6 The JSP including formal stages of public consultation is being prepared in accordance with statutory planning regulations.

Land/Property Implications

- 4.7 When adopted the JSP will provide the strategic planning policy framework to guide the management and use of land in the public interest. The JSP will set the overall quantum of housing development required up to 2036 and will identify broad locations where development will be supported to be brought forward through the authorities Local Plans. Under planning law the assessment of development proposals requiring planning consent will be considered having regard to the policies within the JSP as the Plan will be a statutory development plan document.

Human/Resource Implications

4.8 The JSP has an agreed resource to ensure timely delivery.

Advice given by: Louise Fradd Senior Responsible Owner for the Joint Spatial Plan and Development Director for Bath and North East Somerset Council.

Recommendation

4.9 Members to give their views on the draft JSP and for these to be reported to the Joint Committee.

Report Author: Laura Ambler, (Interim Head of Planning and Housing, WECA)

West of England Combined Authority Contact: Laura Ambler

Laura.Ambler@westofengland-ca.gov.uk

Background Papers: None

REPORT TO: WEST OF ENGLAND JOINT COMMITTEE

DATE: 30th October 2017

REPORT TITLE: WEST OF ENGLAND DRAFT JOINT SPATIAL PLAN

AUTHOR: LAURA AMBLER, WEST OF ENGLAND COMBINED AUTHORITY

Purpose of Report

1.1 To present the Publication version of the Joint Spatial Plan (JSP) to the Joint Committee, for it to consider and subject to their views to recommend to Bristol City Council, Bath and North Somerset Council, South Gloucestershire Council and North Somerset Council; (“the Councils”)

- i) the draft as the publication version of the plan for public consultation in accordance with regulation 19 of the Town and Country Planning Regulations 2012.
- ii) To endorse the timetable set out in this report for the consultation, and if the plan is ready, the subsequent submission of the plan to the Secretary of State for examination and to recommend to the Councils that appropriate delegations are established in each Council so as to enable submission of the Plan in accordance with the timetable.
- iii) To inform the Joint Committee of the evidence base that will accompany the plan.
- iv) To update Joint Committee on the views of members of the Infrastructure Advisory Board, and the Overview and Scrutiny Committee.

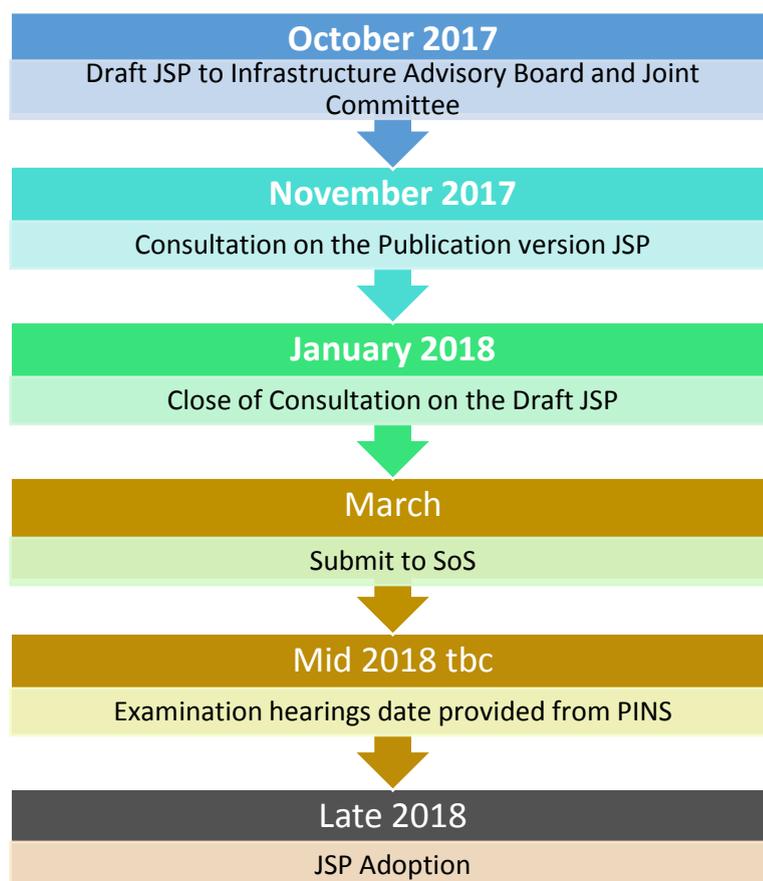
Issues for Consideration

Background

- 2.1 The West of England faces a significant strategic challenge; to accommodate and deliver much needed new homes and jobs properly supported by infrastructure, to create attractive places while maintaining the environmental assets and quality of life unique to our area.
- 2.2 The Joint Spatial Plan (JSP) will address these challenges in a coordinated approach, outlining the housing and employment requirement of the West of England for the period 2016-2036. The document will provide the joint framework to ensure that development requirements are brought forward consistently across the West of England authorities.
- 2.3 This coordination with regards to strategic planning matters is complemented by the approach to address strategic transport issues through the Joint Transport Study (JTS). The JTS has informed the JSP by outlining future strategic transport

proposals for delivery up to 2036 that address current challenges on the network and inform future development proposals in this plan.

- 2.4 Preparation of the JSP has entailed consultation under regulation 18 of the Town and Country Planning (Local Planning) Regulations 2012, through the 'Issues and Options' and 'Towards the Emerging Spatial Plan' consultation stages. These consultation documents and supporting technical information are available for public viewing on www.jointplanningwofe.org.uk
- 2.5 The next consultation on the JSP will be on the Publication Plan under regulation 19 of the Town and Country Planning (Local Planning) Regulations 2012. The Publication version JSP is attached at appendix A.
- 2.6 The proposed consultation period will be from the 22nd November 2017 to the 10th January 2018. If the plan is ready, and subject to any minor modifications, the Plan will then be submitted to the Secretary of State under regulation 22 of the Town and Country Planning (Local Planning) Regulations 2012, in March 2018 for a proposed Examination in Public (EiP) mid-2018. Following the examination and consideration of the Inspector's report, the plan will be adopted by the four Authorities. Once adopted, the JSP will become a statutory Development Plan Document and will guide the four Councils in the development of their Local Plans.



- 2.7 Members of the West of England Scrutiny Committee received an update on the JSP and the key issues it will need to address at its meeting on 27th September and considered the Publication Plan at their meeting on 24th October. The Infrastructure Advisory Board, considered the Publication Plan document on 23rd

October 2017. Their views will be summarised to the Joint Committee at their meeting on 30th October 2017.

The Joint Spatial Plan:

- 2.8 The Publication version Joint Spatial Plan and appropriate supporting documents are appended to this report. Further technical documents will be produced and made available during the consultation stage to support this document.

Scope

- 2.9 The JSP is a strategic level Development Plan Document that will form the strategic policy context for individual Local Plans prepared by the four authorities. The JSP will be a statutory document and will therefore need to be prepared in accordance with statute, local plan regulations and national policy to ensure it is a 'sound' document supported by technical evidence.

The scope of the JSP, with its supporting evidence base, is focused on: identifying the number of new market and affordable homes and amount of employment land needed across the West of England from 2016-2036; identifying the most appropriate spatial strategy and strategic locations for growth; and, outlining the strategic transport and other infrastructure required to support sustainable growth.

Key Issues

- 3.1 Previous stages of the Plan's preparation included public consultation on the key issues and challenges that should be addressed. The comments received have been considered and used to inform the draft Plan's critical issues and strategic priorities. Key issues of which the JSP has needed to address include:
- Identifying housing and employment need.
 - Affordable housing delivery.
 - Quality of homes and place and communities.
 - Infrastructure to support growth.
- 3.2 In addressing these key issues, the draft Plan document outlines the following critical issues and strategic priorities:

Critical Issue	Strategic Priority
There is a critical need to substantially boost the housing supply, particularly affordable housing of which the need is acute across the Plan area.	1. To meet the sub-region's identified housing needs, in a sustainable way. In particular to make a substantial step change in the supply of affordable housing across the plan area.
Economic prosperity has brought substantial benefits to residents, communities & the environment. However, prosperity has not been shared equally by all communities as	2. To pursue inclusive economic growth by accommodating the economic growth objectives of the LEP Strategic Economic Plan. Particularly to:

<p>there are pockets of deprivation within the sub region.</p>	<ul style="list-style-type: none"> • promote the growth of existing employment centres such as the Enterprise Zones and Enterprise Areas • ensure more inclusive growth and life chances for all, across the West of England, and improve accessibility to jobs.
<p>The form and function of development in some parts of the West of England has resulted in significant pressure on infrastructure and settlement patterns which are over-reliant on the private car.</p> <p>This inhibits wealth creation and productivity and contributes to climate change and poor health.</p>	<p>3. To deliver a spatial strategy which;</p> <ul style="list-style-type: none"> • focuses on three primary centres of Bristol, Bath and Weston-super-Mare and recognises the complementary role of market towns to achieve sustainable growth. • ensures that new development is properly aligned with infrastructure and maximises opportunities for sustainable and active travel. • through a place making approach promotes places of density and scale with a range of facilities and which encourages health lifestyles and cultural wellbeing. • integrates high quality, multi-functional green infrastructure. Reduces greenhouse gas emissions and ensure resilience to the impacts of climate change.
<p>The sub-region benefits from a world class environment. This brings substantial economic and community benefits and contributes significantly to the quality of life of residents, visitors and businesses.</p>	<p>4. To protect and enhance the sub-region's diverse and high quality natural, built and historic environment and secure a net gain in biodiversity.</p> <p>To prioritise development on brown field locations, optimise densities and retain the overall function of the Bristol and Bath Green Belt.</p>

Policy Framework

3.3 The Policy framework in the JSP addresses the critical issues and strategic priorities. In summary the policy framework is as follows:

3.4 Policy 1: Housing Requirement:

The JSP sets out the housing need for the period of 2016-2036. The overall housing need for the plan area up to 2036 is 102,200. The housing provision set for the JSP is 105,500 new dwellings which includes a flexibility in supply to ensure the delivery of the housing need. A contingency of around 3,000 dwellings is also identified for consideration as part of plan review should further capacity be required in the future. The mechanism to release any contingency is a plan review at the five year review period. The policy

establishes the distribution between the unitary authority areas based on the spatial strategy (outlined within policy 2).

3.5 Policy 2: Spatial Strategy:

This policy sets out the spatial strategy and the justification underlying the choice of locations for identifying how the JSP housing and job requirements will be delivered across the West of England. The strategy is depicted on the Key Diagram. The reasoned justification to this Policy provides the basis by which the JSP has established the exceptional circumstances to some proposed amendments to the general extent of the Bristol and Bath Green Belt to sustainably accommodate the growth required over the plan period.

3.6 The following sequential approach for housing growth has been applied to achieve the Plan's strategic aims:-

- Reviewing existing commitments,
- Maximising urban capacity & optimising density,
- Allowing for small windfalls beyond that included in Local Plans,
- Allowing for 'non-strategic' growth,
- Assessing potential strategic locations, and
- Assessing other sources e.g. empty homes, specialised housing such as Students & C2 etc

3.7 Policy 3: Affordable Housing Target: There is a critical need to deliver the affordable housing needs for the West of England. The Policy sets the Affordable Housing Target and the framework to boost the delivery of Affordable Housing across the West of England from 2016-2036.

3.8 Policy 4: Employment land requirement: This policy sets out the overall West of England jobs requirement and identifies key strategic employment locations including:

- Existing and strategic town centres
- Enterprise Zones and Areas
- Key strategic infrastructure employment locations
- Additional employment land (floor space and ha) provision will also be identified at strategic development locations.

3.9 Policy 5: Place making principles: This policy sets out the strategic principles to ensure the delivery of high quality and sustainable new development incorporating multi-functional place making principles. These principles will be taken forward and refined through Local Plans and supporting Supplementary Planning Documents/masterplans.

3.10 Policy 6: Strategic Infrastructure: The delivery of new homes through the JSP has an impact on the strategic infrastructure requirements for the West of England. The growth provided through the JSP will add to historic pressures on infrastructure namely transport. The JSP will ensure new development is properly aligned with infrastructure. This policy identifies the strategic infrastructure required to deliver the JSP growth elements. This will reflect the JSP Key Diagram and the supporting Infrastructure Delivery Programme.

3.11 Policy 7: Strategic development locations (SDL): This policy sets out the specific policy requirements for each of the proposed SDLs. These locations will not be allocated through the JSP it will be the role of the new Local Plans

prepared by individual authorities to make the allocations for the SDLs and provide delivery guidance.

Duty to Cooperate

4.1 The 4 authorities of the West of England; Bath & North East Somerset Council, Bristol City Council, North Somerset Council, South Gloucestershire Council and the West of England Combined Authority are committed to work collaboratively through a plan-led approach. Engagement with neighbouring authorities has been ongoing. This is consistent with the Government's core planning principles and the Duty to Cooperate (DtC). By preparing the JSP the 4 authorities are ensuring compliance with the DtC.

Risk Management/Assessment

4.2 There are the following risks associated with this project:

- **Risk:** That the Plan is not found sound.
- **Mitigation:** The plan has been prepared following guidelines and planning regulations, with extensive public consultation. Professional advice has been sought where needed to inform the drafting of the plan.

- **Risk:** That there is a significant issue raised during the consultation which will delay the submission.
- **Mitigation:** as above the plan has been subject to previous consultation to ensure early sight of critical issues to address.

Public Sector Equality Duties

4.3 Feedback will continue to be sought from affected communities and statutory consultees to meet the authorities' duties under the Equality Act 2010 as the Plan progresses through the statutory plan making process. An Equality Impact Assessment of the JSP will be submitted along with the Plan.

Economic Impact Assessment

4.4 The JSP seeks necessary infrastructure to support suitable economic growth. Should this infrastructure not be delivered in a timely way this will act as a significant constraint on the productivity of the local economy and constrain future growth.

Finance Implications

4.5 The financial implications arising from this project are:

- Resources committed are significant and include officer time, consultancy support, and the Examination in Public. These costs are included within existing project budget arrangements. Any suspension during the examination will lead to increased costs.
- The JSP will have implications for CIL and S106 contributions which will be needed to support the delivery of development.
- The JSP sets out clear shared priorities that will help leverage in investment into the West of England and assist as a framework for bidding etc.

Legal Implications

- 4.6 The JSP including formal stages of public consultation is being prepared in accordance with statutory planning regulations, in particular Regulation 19 of the Town and Country Planning Act 1990. This report asks the Joint Committee to recommend the JSP to Councils for publication and consultation and asks the Joint Committee to endorse the timetable for the submission of the plan to the Secretary of State in March 2018 alongside any representations duly made.

The decision to submit the Plan to the Secretary of State for examination rests with the Councils. The Councils will continue to work in accordance with the agreed governance arrangements in preparation for the submission of the Plan for examination.

Land/Property Implications

- 4.7 When adopted the JSP will provide the strategic planning policy framework to guide the management and use of land in the public interest. The JSP will set the overall quantum of housing development required up to 2036 and will identify broad locations where development will be supported to be brought forward through the authorities Local Plans. Under planning law the assessment of development proposals requiring planning consent will be considered having regard to the policies within the JSP as the Plan will be a statutory development plan document.

Human/Resource Implications

- 4.8 The JSP has been prepared to challenging timescales and has required significant joint working and resource across the four authorities and West of England Office. The project has an agreed resource to ensure timely delivery and completion of the plan process.

Advice given by: Louise Fradd Senior Responsible Owner for the Joint Spatial Plan and Development Director for Bath and North East Somerset Council.

Recommendations

- 4.9 The voting on the following recommendations will be as follows, a unanimous decision excluding the West of England Combined Authority Mayor.
- 4.10 **That the West of England Joint Committee is recommended to:**
- 1. Endorse work already undertaken to prepare the Joint Spatial Plan (JSP).**
 - 2. Consider the comments received from the West of England Overview and Scrutiny Committee and the Infrastructure Advisory Board.**
 - 3. Recommends to Bristol City Council, Bath and North East Somerset Council, North Somerset Council and South Gloucestershire Council as the parties responsible for the JSP that the JSP Publication Plan and associated documents (Appendix 1) is published for the purposes of consultation with all interested parties and our communities in accordance with the Town and Country Planning Regulations 2012 (Regulation 19, 20 and 35) for a minimum of 6 weeks.**
 - 4. Endorse the timetable for the consultation and if the plan is ready, subsequent submission of the Plan to the Secretary of State for examination in public period as set out in this report and to recommend to the Councils that appropriate delegations are established in each Council so as to enable submission of the Plan in accordance with the timetable.**

Report Author: Laura Ambler, (Interim Head of Planning and Housing, WECA)

West of England Combined Authority Contact: Laura Ambler

Laura.Ambler@westofengland-ca.gov.uk

Background Papers

None

Appendices:

- Appendix A: Publication version Joint Spatial Plan.
- Appendix B: Strategic Development Location Templates.
- Appendix C: Draft Sustainability Appraisal (summary).
- Appendix D: Habitats Regulation Assessment update paper.
- Appendix E: Report on Engagement and main issues raised.
- Appendix F: Housing Topic Paper 1.

WEST OF ENGLAND JOINT SPATIAL PLAN - October 2017

Foreword

The West of England (WoE) currently faces a key challenge; how to accommodate and deliver much needed new homes, jobs and infrastructure alongside protecting and enhancing our unique and high quality built and natural environment. It is this combination that will create viable, healthy and attractive places. This is key to the ongoing success of the West of England which contributes to its appeal and its high quality of life.

Many people feel passionately about where they live and the impact new growth might have on their local communities. They value their local environment, landscape and biodiversity in terms of how it enhances the character and identity of places, and the well-being of residents. This plan, aims to build a common understanding of the need for new housing and the benefits that new development will bring including transport improvements, and the opportunity to improve the links for all our communities with homes and jobs.

This is not just a local issue. The UK is struggling to meet growing demand for new homes. The national economic prosperity relies on areas of growth such as the West of England to increase productivity. It is important that the housing market enables a flexible labour market to support a productive economy. A range of suitable housing options is needed to meet the needs of our ageing population, increase community involvement and improve wellbeing.

We have to address key economic and social imbalances within our city region and support inclusive growth. In the WoE, we need to take steps to ensure more homes are built of the right type and mix, and in locations that people and businesses need. Businesses should be able to locate where they can be most efficient and create jobs, enabling people to live, rent and own homes in places which are accessible to where they work. Transport and infrastructure provision needs to be in place up front or to keep pace with development to support sustainable growth.

The challenges involved and the scale of the issues to be addressed requires a strategic approach and a new strategic direction.

We have joined forces to prepare a different type of plan to tackle this challenge. The **Joint Spatial Plan** (JSP) is a strategic Development Plan Document that will provide the strategic overarching development framework to guide housing, employment and infrastructure requirements to 2036.

We are committed to this plan led approach to provide certainty to our communities and investors, in order to secure high quality, sustainable growth for the West of England.

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CHAPTER 1: INTRODUCTION

A plan for sustainable growth

1. The West of England (WoE) currently faces a key challenge: how to accommodate and deliver much needed new homes and jobs properly supported by infrastructure to create attractive places, while maintaining the environmental assets and quality of life unique to our area. The scale of the issue to be addressed requires an ambitious strategic response.
2. The local authorities of Bath and North East Somerset Council, Bristol City Council, North Somerset Council and South Gloucestershire Council have joined forces to prepare the Joint Spatial Plan (JSP). The JSP is a statutory Development Plan Document that will provide the strategic overarching development framework for the West of England to 2036. Joint working on this plan is part of the authorities ongoing commitment to meeting the duty to cooperate.
3. In tandem with the JSP, a Joint Transport Study (JTS) has been prepared. The JTS has identified potential future strategic transport proposals for delivery up to 2036 that address current challenges on the network and to inform future development proposals in this plan. The JTS sets out the following Transport Vision:
“Transport in the West of England will be transformed over the next 20 years through a programme of complementary measures designed to address underlying challenges and to enable the sustainable delivery of new housing and employment growth.”
4. The JTS has informed, and has been informed by, the JSP. This joint approach to planning and transport will ensure that future growth decisions are made with an understanding of the necessary transport investment needed to achieve sustainable communities.

Purpose of the Joint Spatial Plan

5. The four authorities are committed to a positive plan-led approach to steer the nature and location of future development and secure funding for essential infrastructure. This is consistent with the Government’s core planning principles and the Duty to Cooperate. The JSP will form the strategic policy for individual Local Plans prepared by the four authorities. The scope of the JSP, with its supporting evidence base, is focused on addressing the following critical issues:
 - identifying the number of new market and affordable homes and amount of employment land that is needed across the West of England 2016-2036.
 - identifying the most appropriate spatial strategy and strategic locations for this growth.
 - outlining the strategic transport and other infrastructure that needs to be provided in the right place and at the right time to support sustainable growth and to provide certainty for our communities and those that want to invest in our area.

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Relationship of the Joint Spatial Plan to Local Plans

6. The JSP is a strategic statutory development plan document (DPD) for the West of England. It is being prepared jointly by and will cover the 4 Unitary Authorities of Bristol, Bath and North East Somerset, North Somerset and South Gloucestershire.
7. On adoption as a Development Plan document it will carry full weight in the planning system and provide the higher level strategic planning policy framework for each authority's new Local Plan for the period 2016 to 2036. Whilst the JSP will not allocate new sites, it does identify new strategic development locations (SDL's), which are shown on the Key diagram. These will be brought forward as allocations through each authority's new Local Plan New site specific allocations and policy designations in Local Plans will need to be in conformity with the JSP.
8. The JSP is not a qualifying document for establishing planning permission in principle under the Housing and Planning Act 2016.
9. In March 2017 the West of England Combined Authority (WECA) was established. The Combined Authority comprises Bath and North East Somerset, Bristol and South Gloucestershire Councils. The Combined Authority has a Mayor who has devolved powers including strategic planning, and a duty to prepare a Mayoral Spatial Strategy. This duty takes effect from May 2018. The Mayoral Spatial Strategy will relate to the areas covered by the Combined Authority. The Joint Spatial Plan which is being prepared by the 4 West of England authorities will provide a firm foundation to inform its preparation.

Sustainability Appraisal and Evidence Base.

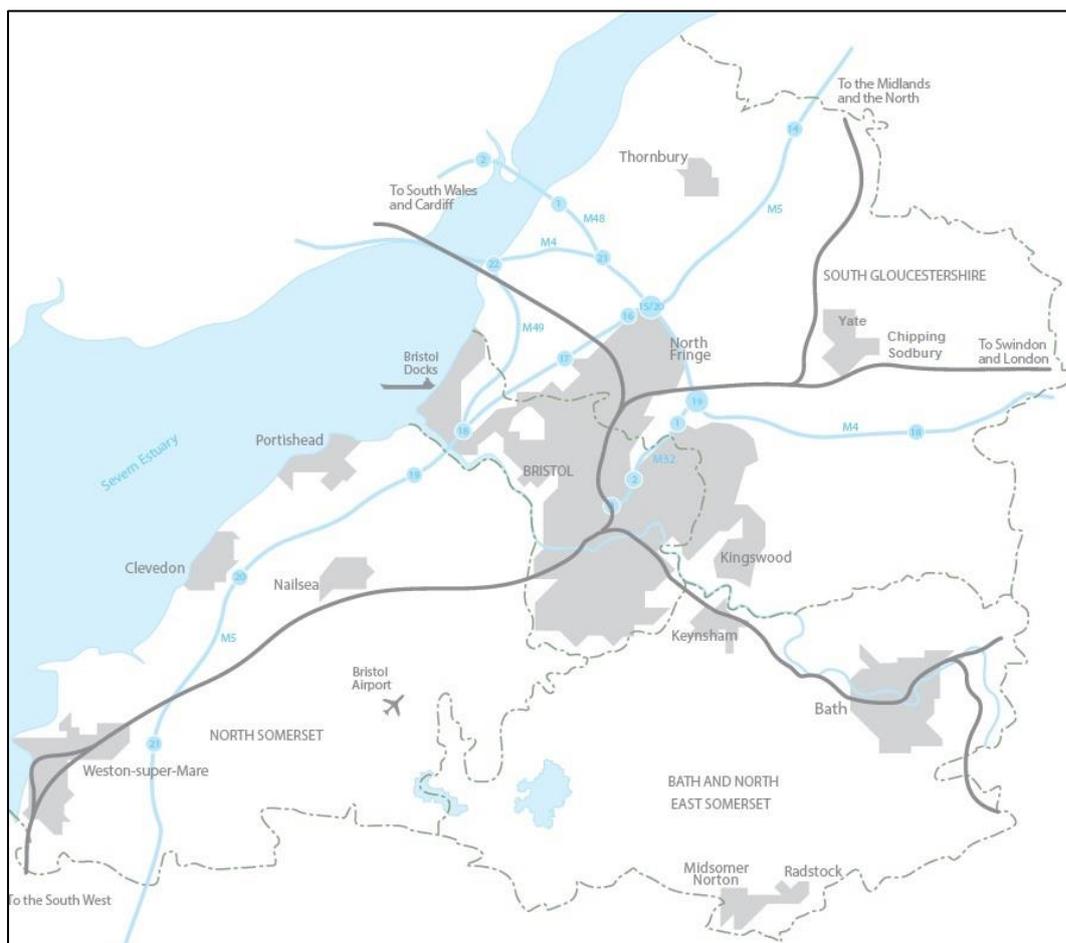
10. The Joint Spatial Plan has been subject to a Sustainability Appraisal as an integral part of its production to help formulate the strategy. A scoping report was published alongside the Issues and Options document in November 2015. An appraisal of the Emerging Spatial Strategy draft plan was published in September 2016. A Sustainability Appraisal for this final draft Joint Spatial Plan has been published alongside the plan.
11. A substantial evidence base has been prepared to support and inform the preparation for this plan. Full details are available at:
www.jointplanningwofe.org.uk
12. The Plan has been prepared working closely with key stakeholders including;
 - Government agencies: Homes and Communities Agency, Environment Agency, Natural England, Historic England, Highways England, Network Rail
 - Neighbouring Authorities
 - Public Health
 - Infrastructure Providers, and in
 - consultation with delivery partners.

CHAPTER 2: VISION, CRITICAL ISSUES & STRATEGIC PRIORITIES

The Plan area

1. The West of England (WoE) covers the four Unitary Authorities (UAs) of Bath and North East Somerset (B&NES), Bristol, North Somerset and South Gloucestershire. This is the **Plan area** for the JSP as shown in Figure 1.

Figure 1: West of England Plan area.



Housing Market Areas

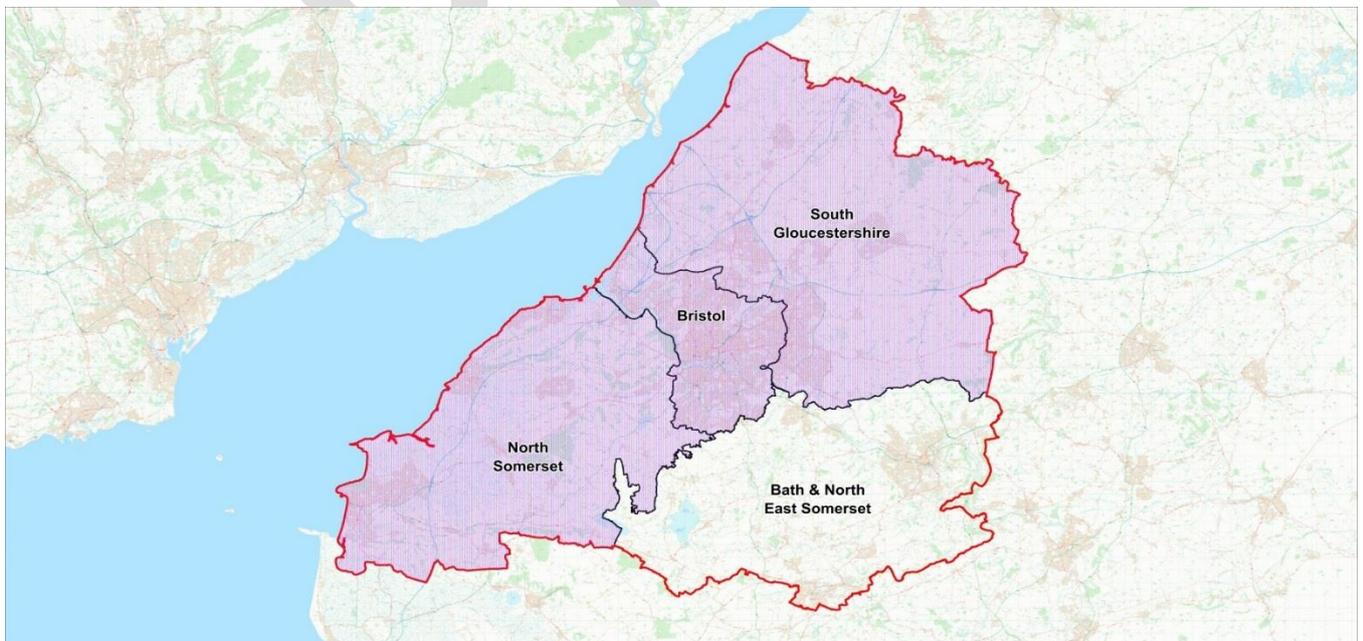
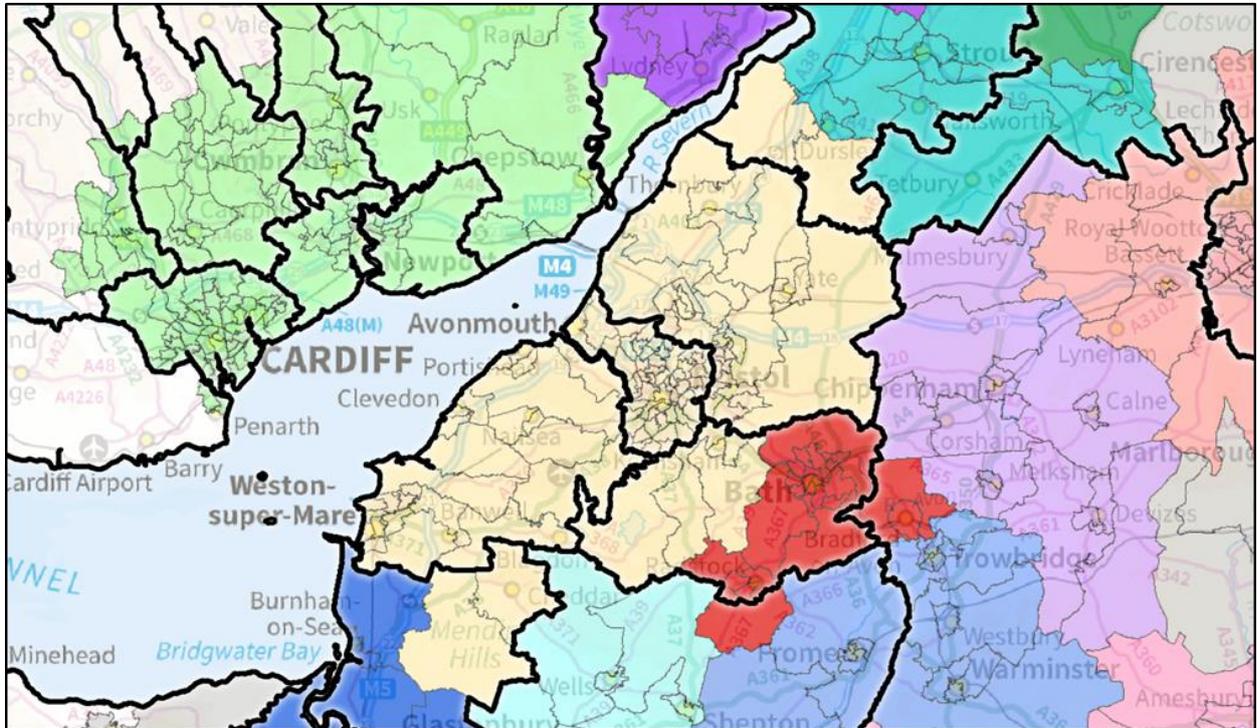
2. The National Planning Policy Framework (NPPF) requires local plans to be informed by a Strategic Housing Market Assessment (SHMA) in order that there is a clear understanding of the needs of their area. The first required step is to establish the Housing Market Area (HMA).
3. The SHMA identifies two separate Housing Market Areas that operate across the West of England. One focussed on the wider Bristol HMA, which includes Weston-super-Mare as a sub housing market area, and the other focussed on Bath.
4. The JSP sets out the housing target across the whole plan area (encompassing all four Unitary Authorities) based upon meeting the needs of both the wider Bristol

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HMA and the Bath HMA. Further information on housing need is set out in Chapter 4 alongside Policy 2.

5. The diagrams below show both the technical HMAs and the functional HMAs in the West of England.

Figure 2: Technical and functional Housing Market Areas.



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Functional Economic Market Areas

6. The Economic Development Needs Assessment (EDNA) has defined the West of England (encompassing all four Unitary Authorities) as a Functional Economic Market Area (FEMA). This is because there is a high level of people, almost 90%, who live in the area and also work in the area.
7. The JSP sets out the current and future strategic employment locations 2016-2036 that are needed to support the job forecasts which underpin the West of England's economic aspirations. Furthermore detailed work will be undertaken in local plans to ensure local needs are met in the context of local market conditions. This will include identification of economic priorities and options for the distribution of employment land supply. Both the HMA and FEMA evidence show a high level of functional containment within the WoE geographical area. The WoE therefore performs strongly as a geographical unit and this provides an effective basis to plan for a sustainable spatial strategy for the Bristol City Region.
8. The WoE is a generally prosperous area with an excellent quality of life and a growing national and international profile.

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West of England Key facts and figures

- The WoE covers an area of 1,343 km². It has a growing population which currently stands at 1.1 million people, around 90% of which live in urban areas. The three principal urban areas are Bristol (617,280 pop), Bath (94,782 pop) and Weston-super-Mare (84,452 pop)¹.
- Its economy is worth £31bn a year and makes a net contribution to the UK Treasury.
- 22% of employment is within the high-tech economy above the national average.
- 44% of the population has higher level skills Level 4 or above. There are skill gaps in the workforce at entry level and Level 2 qualifications.
- There is good connectivity including accessibility to London, South Wales the Midlands and the South West, a major airport and port, rail and strategic road network, all of which enables access to global mass markets.
- The WoE has an outstanding physical environment with two Areas of Outstanding Natural Beauty, the only UK 'whole city' World Heritage Site, coast, areas of international ecological importance and a diverse countryside with attractive market towns and villages.
- Between 2006/7 and 2015/6 26% of new homes built, were Affordable Homes in the WoE.
- Affordability ratios (average earnings to average house prices vary across the sub region), UA averages are: B&NES 10.5, Bristol 9.2, N.Som 8.0, and S.Glos 8.4. Compared to the National average of 7.9².
- The WoE has a number of areas which fall within the 10% most deprived nationally equating to some 83,916 people or 7.8% of the WoE population. These areas are focused primarily in Bristol and Weston-super-Mare.
- The 2011 census shows that across the West of England around 14 % of commuters walk to work and 5% cycle, which are above the national average of 11% and 3% respectively.
- Bus patronage has increased by 17% since 2008/09, which is against the national trend of decline, although the number of bus journeys per head of population are still below other core English cities.
- Approximately 2% of commuting journeys are by train.
- Car based travel still accounts for around two-thirds of commuting journeys in the West of England.

¹ Source 2011 Census, based on the usual residents by built up area

² Source: Land Registry; Annual Survey of Hours and Earnings, Office for National Statistics.

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Critical issues

9. Previous stages of the plan's preparation included public consultation on the key issues and challenges that should be addressed. The comments received have been taken into account and used to inform the Plan's critical issues and strategic priorities. The table below demonstrates what we consider are the critical issues facing the West of England and how these relate to the Plan's spatial objectives and overarching strategic priorities.

Figure 3 Critical issues and strategic priorities.

Critical Issue	Strategic Priority	Policy framework	Outcome
There is a critical need to substantially boost the housing supply, particularly affordable housing of which the need is acute across the Plan area.	1. To meet the sub-region's identified housing needs, in a sustainable way. In particular to make a substantial step change in the supply of affordable housing across the plan area.	1, 2, 3, 7	Delivery of the Plan's housing requirement and affordable housing target (as set out at Policy 1 and Policy 3 in accordance with the Plan's spatial strategy at Policy 2).
Economic prosperity has brought substantial benefits to residents, communities & the environment. However, prosperity has not been shared equally by all communities as there are pockets of deprivation within the sub region.	2. To pursue inclusive economic growth by accommodating the economic growth objectives of the LEP Strategic Economic Plan. Particularly to: <ul style="list-style-type: none"> • promote the growth of existing employment centres such as the Enterprise Zones and Enterprise Areas • ensure more inclusive growth and life chances for all, across the West of England, and improve accessibility to jobs. 	4	Delivery of the Plan's employment land requirement (as set out at Policy 4 in accordance with the Plan's spatial strategy at Policy 2).
The form and function of development in some parts of the West of England has resulted in significant pressure on infrastructure and settlement patterns which are over-reliant on the private car.	3. To deliver a spatial strategy which; <ul style="list-style-type: none"> • focuses on three primary centres of Bristol, Bath and Weston-super-Mare and recognises the complementary role of market towns to achieve sustainable growth. 	2,5,6,7	Sustainable growth of homes and jobs, supported by necessary infrastructure. Reduction in car dependency and improved public transport access to

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<p>This inhibits wealth creation and productivity and contributes to climate change and poor health.</p>	<ul style="list-style-type: none"> ensures that new development is properly aligned with infrastructure and maximises opportunities for sustainable and active travel. through a place making approach promotes places of density and scale with a range of facilities and which encourages healthy lifestyles and cultural wellbeing. integrates high quality, multi-functional green infrastructure. Reduces greenhouse gas emissions and ensure resilience to the impacts of climate change. 		<p>opportunity, jobs and services.</p> <p>Contribution to mitigating impacts of climate change.</p> <p>Delivery of Communities in which people want to live and work and;</p> <p>Improved health and well being outcomes.</p>
<p>The sub-region benefits from a world class environment. This brings substantial economic and community benefits and contributes significantly to the quality of life of residents, visitors and businesses.</p>	<p>4. To protect and enhance the sub-region's diverse and high quality natural, built and historic environment and secure a net gain in biodiversity.</p> <p>To prioritise development on brown field locations, optimise densities and retain the overall function of the Bristol and Bath Green Belt.</p>		<p>Enhanced quality of the natural, built and historic environment.</p> <p>Biodiversity gains.</p>

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Vision and Strategic Priorities

10. The West of England Joint Spatial Plan vision is consistent with national policy, and stems from the critical issues identified in the Issues and Options document, and the WoE LEP Strategic Economic Plan (SEP) economic vision for the sub-region to 2036. The economic vision has been augmented to reflect social and environmental aspirations. The proposed vision for the JSP has public support as demonstrated by 71% of respondents to the public consultation at the end of 2015.

Proposed Vision for the West of England Joint Spatial Plan

By 2036 the WoE will be one of Europe's fastest growing and most prosperous city regions with the gap between disadvantaged and other communities closed and a rising quality of life for all. The rich and diverse environmental character will be integral to health and economic prosperity. Patterns of development and transport will facilitate healthy and sustainable lifestyles. Provision of a range of housing types, will be of high quality and more affordable. Existing and new communities will be well integrated, attractive and desirable places and supported by the necessary infrastructure. New development will be designed to be resilient to, and reduce the impacts of climate change.

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CHAPTER 3: FORMULATING THE SPATIAL STRATEGY

1. The role of the JSP is to provide the broad spatial strategy that will:
 - deliver the Plan Vision and strategic priorities in order to address the critical issues identified in chapter 2, and
 - secure the delivery of the identified needs of development.
2. The Spatial Strategy has been formulated to deliver the Objectively Assessed Need of 97,800 new homes and the Housing Requirement of 102,200 new homes. It identifies an overall supply of 105,500 new homes to enable flexibility.
3. The Spatial Strategy supports the delivery of 82,500 jobs. The employment aspects of the strategy are described under Policy 4.
4. It is the role of the individual UAs, to provide the more detailed local policies, including how the different components of housing need are met such as the needs of the travelling community, students, older people and the range of dwelling types and size needed.

Building the spatial strategy:

5. Topic Paper x sets out how the spatial strategy was formulated and this is outlined in the reasoned justification to Policy 2.
6. In summary, when formulating the spatial strategy, the potential supply from a variety of sources and the reasonable alternatives have been assessed, primarily:
 - reviewing existing commitments,
 - maximising urban capacity & optimising density,
 - allowing for small windfalls beyond that included in Local Plans,
 - allowing for 'non-strategic' growth,
 - assessing potential strategic locations, and
 - assessing other sources e.g. empty homes, specialised housing such as Students & C2.

Existing commitments

7. The four authorities' existing Local Plans make provision for around 61,500 new dwellings at April 2016. This is predominantly on previously developed land (60.23%). There is supporting growth at towns, and villages and also several greenfield strategic locations in existing local plans. When compared to the housing supply figure identified (105,500) there are **up to 44,000 additional dwellings to 2036, that need to be planned for through the JSP spatial strategy.**

Figure 4: Housing Supply against existing commitments at April 2016.



Urban Living -optimising the potential of urban areas

8. Urban Living is a central plank of the Spatial Strategy which commands a high degree of public support and is a highly sustainable element of the strategy. The four UAs have assessed the potential of existing urban areas to deliver land to meet development needs. In recent years a high proportion of new homes have been delivered on brownfield land in urban areas. Bristol has delivered 45% of the new housing provision across the JSP plan area since 2006, much of it on previously developed land. This process has been aided by new approaches to urban density to optimise quality urban living. This has developed new thinking about the nature of liveable cities and towns and the trends in the type of accommodation we seek. It is recognised that the success will rely on the ability to plan effectively the use of all public services as part of this concept.

9. Evidence has identified that through optimising opportunities for development in urban areas, there is the potential for a further 16,200 new homes to be delivered across the plan area. Opportunities for maximising the potential of existing land in urban areas will result from:

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- The change of use of non-residential brown field land to residential – where the previous use is no longer required or residential use would result in the more efficient use for the land.
- Identifying land which is currently underused and has potential for residential development or mixed use development.
- Identification of mechanisms to ensure more certainty over the delivery of large windfall sites.
- Increasing the density of development on allocated or existing sites by reappraising and increasing their development potential in line with new thinking on urban living.

Small windfalls

10. The existing commitments make an allowance for small windfall sites (ie 9 dwellings or below). The JSP also makes an allowance for this component of growth to continue to the end of the Plan period. This contributes around 6,860 dwellings to the JSP strategy.

Non-Strategic Growth

11. An allowance is proposed to be made for ‘non-strategic growth’ in sustainable locations to accommodate smaller scale development in villages and towns which is needed to enable local communities to thrive. Detailed proposals will be brought forward through each Authority’s local plan. This contributes 3,400 new dwellings to the JSP strategy.

Strategic Development Locations

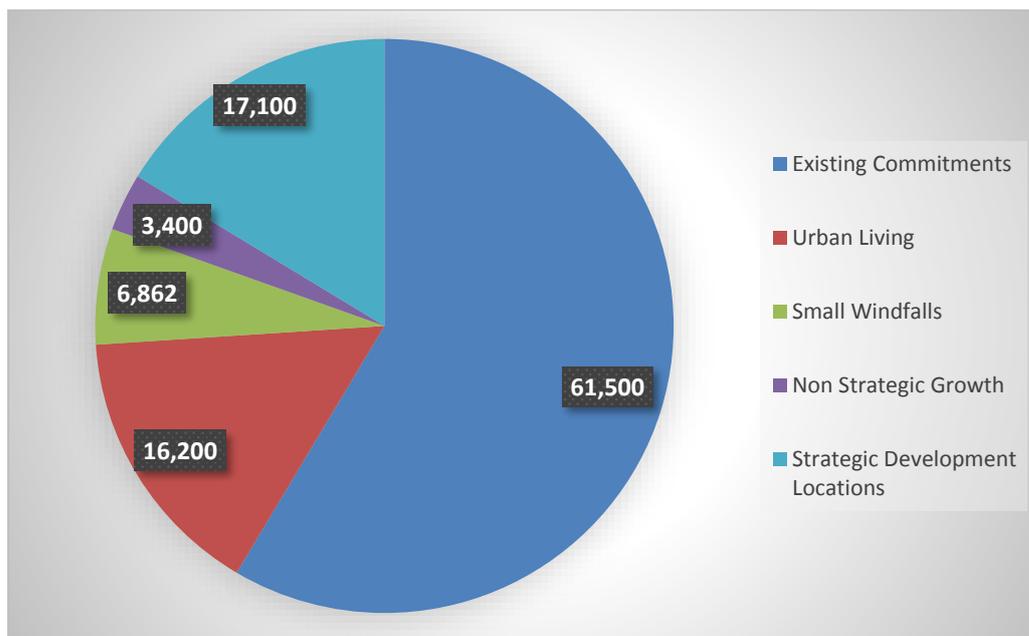
12. Against the supply described above, there is the need to identify land for another 17,600 dwellings in order to meet the housing requirement with sufficient flexibility.
13. Locations which are currently, and are anticipated to be, significant generators of trips include central Bristol, parts of the Bristol North Fringe, central Bath/Bath Enterprise Zone and Weston-super-Mare. However, an approach which focusses on increasing existing urban development opportunities and expansion will not be sufficient to meet the homes and job needs of the Region over the next 20 years. Additional new sustainable locations will be needed which may include new innovative solutions such as garden villages or extensions.
14. The Strategic Development Locations are identified which are capable of delivering large scale development (500 dwellings+) over the plan period in locations which support the spatial strategy. This approach recognises all aspects of sustainability including growth well related to the central areas and other parts of urban areas where people seek to travel for work, shopping and recreational needs.
15. Sustainability is closely related to proximity and accessibility to services and facilities, particularly in Bristol, Bath and Weston super-Mare and the potential to use existing and new transport corridor opportunities. Other sustainability factors to meet the priorities of the Plan have also been considered including rebalancing

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economic growth, maintaining and enhancing the environment and retaining the overall function of the Green Belt.

16. There is the need to avoid the unsustainable expansion of the north and east fringes of the Bristol urban area beyond the substantial existing commitments that are identified to be delivered in adopted Local Plans. Evidence also shows that due to significant environmental constraints there is no scope to further expand Bath outwards.
17. Alongside this, it is also recognised that existing towns and larger villages have a role to play in supporting sustainable economic growth. Strategic opportunities have been identified where investment in high profile public transport will assist in delivering sustainable growth.
18. A sizeable proportion (48%) of the West of England area is within the Bristol-Bath Green Belt. This has significant implications for the Spatial Strategy, particularly reflecting the strategic priority to retain the overall function of the Green Belt. The advice in NPPF para 83 is *“Once established, Green Belt boundaries should only be altered in exceptional circumstances, through the preparation or review of the Local Plan. At that time, authorities should consider the Green Belt boundaries having regard to their intended permanence in the long term, so that they should be capable of enduring beyond the plan period.”*
19. Technical work and transport modelling have shown that it is not possible to sustainably accommodate all the identified growth needs entirely outside the Green Belt. The transport impacts cannot be fully mitigated even with substantial investment. Such a strategy would be dependent on some highly unsustainable locations that are very difficult and expensive to mitigate with only sub-optimal solutions. It would also put pressure to locate development in the flood risk areas. These issues would impact on delivery of such a strategy.
20. In response to concerns expressed through public consultation, the spatial strategy aims to minimise the impact on the Bristol and Bath Green Belt. However, due to the scale of provision required and the extensive nature of the Green Belt, the Plan does include some Strategic Development Locations currently with Green Belt designation as explained in the Spatial Strategy Topic paper. Finally, the opportunity for new free standing garden village settlements forms part of the strategy.
21. A summary of the components of supply in the Spatial Strategy is set out at figure 5.

Figure 5: Components of supply in the Spatial Strategy



Demonstrating Flexibility and Contingency

22. The housing trajectory which sets out the phasing of the supply to meet the identified target is set out at Appendix 1 to the Housing Topic Paper. This shows that the plan has a sufficient flexibility to deliver identified needs across the plan period as well as addressing the requirement to demonstrate a five year land supply. The Plan also has flexibility to assist the market in delivering the identified employment land.
23. To enable delivery and implementation of the identified Objectively Assessed Need of 97,800 dwellings and the housing requirement of 102,200, the authorities have identified a supply of 105,500 dwellings. This is between 5% and 10% over the OAN, thus providing some flexibility should any issues of non-delivery arise. In addition, the JSP identifies a contingency supply (of around 3,000 homes). Release of the contingency will be considered should development not come forward as anticipated. A plan review would be the mechanism to undertake the release of the contingency informed by monitoring of delivery. It is emerging national policy guidance that plans be reviewed after 5 years. This gives an overall potential housing supply within the JSP Plan period of 108,000 new homes (including contingency).

Mitigations and infrastructure required to support the Spatial Strategy

24. It is recognised that provision of necessary infrastructure up front or phased to support development is critical to the successful delivery of the spatial strategy. Strategic infrastructure that will be required to deliver the Spatial Strategy is included in the Key Diagram at Appendix A.

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25. Our transport network has to accommodate an increasing volume of travel and complex travel patterns. Increasing demand has contributed to a network that is often at capacity at peak times, with increased journey times and congestion. These impacts have been perceived as a barrier to securing sustainable economic growth. This threatens not only the productivity of our businesses and workforce but also our ability to meet wider sustainable objectives such as reducing carbon emissions and improving air quality in our urban areas.
26. Transport investment can be a major influence on where development is located and how to create high quality places in which people want to live and work. Influencing the location of development will not of itself be sufficient to address the issue.
27. Integrating housing and employment development with investment in reliable, high quality transport choices will:
- reduce the length and number of journeys to work, and other services and facilities.
 - encourage more sustainable travel modes such as cycling, walking and public transport.
 - reduce the reliance on car based journeys.
28. In response to the spatial strategy, transport infrastructure provision to support the additional development required seeks to:
- maximise the effectiveness of sustainable travel choices and encourage mode shift (to rail, MetroBus, Park & Ride, bus, cycling, walking) across the plan area.
 - maximise the effectiveness of non-car mode choices for both urban living and new development outside existing urban areas; and then
 - mitigate impacts of additional traffic, including investigation of junction capacity improvements, upgrades, new highway connections and traffic restrictions.

Encouraging sustainable travel choices across the plan area

29. **MetroBus** (Bus Rapid Transit) will be central to delivering the shift from a reliance on the car to a public transport mode of transport. Particularly at strategic development locations, and along key corridors with a number of locations outside of walking/cycling distance from key destinations and less-well served by the conventional bus and rail networks;
30. **A network of new Park & Ride and interchange schemes** will help to intercept trips on the edge of Bristol, Bath and Weston urban areas, reduce traffic in these areas and improve conditions for walking, cycling and public transport;
31. **Conventional local bus services and in particular improving existing bus services** will be an important part of promoting sustainable travel on several corridors;

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32. **Rail** will play an important role for access to urban centres, but improvements will be needed (capacity, access to stations, parking, station environment, interchanges). Despite impressive levels of passenger growth in recent years rail currently has a modest modal share and is therefore part of a wider package of transport measures. Some locations will remain difficult to serve by rail.
33. **Walking and cycling** must take a central role for shorter trips –creating environments where active travel choices are the first choice, with better links to surrounding walking and cycling networks.

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CHAPTER 4: POLICY FRAMEWORK

POLICY 1 – THE HOUSING REQUIREMENT

In order to deliver the housing requirement for the West of England of 102,200 homes between 2016 and 2036, the Joint Spatial Plan (JSP) makes provision for the supply of at least 105,500 new homes.

Based on the spatial strategy in Policy 2, the supply will be distributed between the unitary authorities as follows:

- | | |
|--------------------------------|------------------|
| • Bath and North East Somerset | 14,500 dwellings |
| • Bristol City | 33,500 dwellings |
| • North Somerset | 25,000 dwellings |
| • South Gloucestershire | 32,500 dwellings |

The Plan also makes provision for contingency supply which, if required would take the total housing supply available over the Plan period to 108,000 as set out in Policy 2.

The 5 year Housing Land Supply assessment will be based on the Housing Requirement of 102,200 and will be set out in the UAs Local Plans.

Reasoned Justification for Policy 1.

1. **Housing Requirement:** The Strategic Housing Market Assessments (SHMA) prepared for the West of England evidenced an Objectively Assessed Need (OAN) for housing of 97,800 dwellings (dwellings) for the plan period 2016-2036. This comprises 85,000 dwellings for Wider Bristol Housing Market Area (HMA) and 12,800 dwellings for the Bath HMA).
2. This takes account of changes to net migration, the need to align future jobs and workers, in response to market signals, and to support the delivery of affordable housing. To take account of the needs of older people, the Housing Requirement is 102,200 dwellings for the Plan period as set out in the SHMA update. To allow some flexibility, the JSP makes provision for 105,500 dwellings by 2036.
3. **District distribution:** Policy 1 sets out the broad distribution of the Housing Requirement between the four districts. This is derived from the JSP spatial strategy and the location of committed and proposed housing growth over the plan period. Detailed delivery of the district distribution will be through local plans.
4. In the event that development does not come forward as anticipated, an additional contingency supply of around 3,000 dwellings has been identified as set out in Policy 2.
5. **The 5 year Housing Land Supply** assessment is based on the Housing Requirement of 102,200 dwellings and this will be established for each District through the respective UA Local Plans.

POLICY 2 – THE SPATIAL STRATEGY

The Joint Spatial Plan housing and job requirements will be achieved through:

- 1. The delivery of existing Local Plan commitments,**
- 2. Maximising the sustainable development of previously developed land and other appropriate opportunities within existing urban areas,**
- 3. Enabling non-strategic sustainable development at locations identified and brought forward through local plans to meet the UA housing and employment requirements.**
- 4. The allocation in Local Plans of the following Strategic Development Locations:**
 - Bath & North East Somerset: North Keynsham, Whitchurch.**
 - Bristol: Land at Bath Road Brislington**
 - North Somerset: Backwell, Banwell, Churchill, Nailsea.**
 - South Gloucestershire: Buckover, Charfield, Coalpit Heath, Thornbury, Yate.**

The strategic policy requirements for each of the strategic development locations are set out in Policy 7.

The spatial strategy is illustrated on the Key Diagram.

The general extent of the Green Belt is maintained except where it is required to be amended through local plans to enable the delivery of the strategic development locations at Coalpit Heath, North Keynsham, Yate, Bath Road, Brislington and Whitchurch.

Contingency/Review:

The Plan will be reviewed every 5 years following adoption. If monitoring demonstrates that the planned housing provision, is not being delivered at the levels being planned for and there would be no reasonable prospect of the planned delivery being met, the identified contingency will be considered for release through plan review.

Reasoned Justification for Policy 2

- 6. Policy 2 sets out the Plan's spatial strategy. The Plan promotes a pattern of development across both Housing Market Areas which most appropriately delivers the Plan's Vision and Strategic Priorities. In particular, it seeks to meet the need for new homes and economic growth supported by the necessary infrastructure. Chapter 3 and Topic Paper x sets out in more detail how the spatial strategy was developed.**
- 7. Development of the strategy has been informed by the Sustainability Appraisal and a broad evidence base.**

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8. Provision is made to deliver 105,500 new dwellings and 82,500 jobs by 2036. Of this, a significant proportion, around 61,500 new homes are already identified in existing adopted plans. A principal element of the strategy is to maximise development opportunities in urban areas, whilst securing a high quality environment for existing and future residents. This approach helps to ensure new development is well related to facilities and benefits from existing infrastructure and yields about an additional 16,200 dgs. In recognising the role of the network of smaller towns and settlements provision is also made for 'non-strategic' growth (3,400 dwellings), and small site windfall development (6,800) with locations to be identified in UA Local Plans.
9. The above provision leaves nearly 17,600 dwellings to be accommodated. Whilst all brownfield options have been considered the identification of strategic, greenfield locations (500 or more dwellings for the purposes of the JSP) is warranted. Topic Paper x describes in more detail how the potential Strategic Development Locations (SDLs) have been identified.
10. A number of spatial scenarios were tested in order to establish the most appropriate strategy and help select the strategic locations which would effectively deliver the Plan's priorities. The preferred approach is to achieve a balanced portfolio, which in combination focusses development at locations: well related to existing urban areas; which are served by existing sustainable transport routes; or those with the potential to be sustainable, as a result of the type and form of development proposed. This reduces the need for travel to facilities and employment and where travel is needed, to do it more sustainably. In particular it facilitates the priority of economic rebalancing, thereby helping to address the pockets of deprivation within the sub-region. The preferred locations have also take account of the need for the spatial rebalancing of the Bristol city region in response to the extensive past growth and build out of the existing commitments which remain (of some 13,000 homes) at the north and east fringes of Bristol over the next 10 to 15 years.
11. A substantial part of the sub-region (around 48%) lies with the Bristol- Bath Green Belt. This creates a tension as some of the most sustainable (or potentially sustainable) locations in terms of their proximity to the Bristol urban area are within the Green Belt. The UAs assessed the scope to meet the need for development by avoiding Green Belt locations, including options in adjoining Authorities. However, the avoidance of the Green Belt resulted in a strategy which would entail highly unsustainable patterns of development, would have significant delivery issues and would severely compromise the Plan's objectives.
12. Having examined the other reasonable options for meeting the identified development requirements, the UAs have concluded that there are exceptional circumstances to justify the release of certain locations from the Green Belt. In doing so, the UAs have sought to minimize the impact on the Green Belt and its general extent remains unchanged, with 0.65% proposed to be removed.

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13. The JSP provides the basis for the UAs to formally allocate the SDLs in their individual Local Plans. Local Plans will set out the detailed site requirements, delivery arrangements and facilitate mitigation and/or enhancements both on site and off site. Local Plan preparation will provide the mechanism to amend local Green Belt boundaries. In the meantime, these locations will remain as part of the Green Belt. Opportunities to extend Green belt will be explored through local plans such as at Thornbury/ Buckover and Nailsea/Backwell.
14. The strategy provides a robust supply of deliverable land for housing for the Plan period with a choice of locations and flexibility to respond to changing circumstances. The strategy provides a firm basis for the UAs to demonstrate a 5 year housing land supply in each UA Local Plan, based on the identified Housing Requirement.
15. The plan will be reviewed at 5 year intervals to ensure that the strategy is being delivered and to take into account new evidence. In the event that housing was not being delivered at the levels being planned for and if there would be no reasonable prospect of the planned delivery being recovered, the Plan identifies some contingency locations to be considered for release through Plan review. This contingency comprises;
- Land south of Chipping Sodbury, (around 1,500 dwellings with up to 775 deliverable within the Plan period) and an additional 225 dwellings at North West Yate, South Gloucestershire.
 - Land at east Clevedon, North Somerset (around 1,500 dwellings)
 - Increased non-strategic growth in South Gloucestershire (around 500 dwellings) and in B&NES (100 dwellings)
16. The spatial strategy, as shown in the Key Diagram below, enables the identified growth needs of the West of England to be met in a sustainable and deliverable way, properly aligned with new infrastructure and with flexibility. It enables the retention and enhancement of the sub-region's high quality environment, provides benefits to existing communities and it facilitates the development of exemplar, sustainable new places. This is the most appropriate strategy for the West of England as evidenced through Sustainability Appraisal (SA) testing and in effectively delivering the Plan's spatial priorities.

POLICY 3 – THE AFFORDABLE HOUSING TARGET

- 1. The Affordable Housing Target for the West of England for 2016-2036 is 24,500 net new affordable dwellings. Delivery of Affordable Housing, in a range of tenure and unit types, is a significant priority in all residential development.**
- 2. Affordable Housing is defined as social rented, affordable rented and intermediate housing provided to households whose needs are not met by the market with regard to local incomes, house prices and rents.**
- 3. On residential developments delivering 5 or more dwellings or sites larger than 0.2ha, whichever is the lower, a minimum target of 35% Affordable Housing to be delivered on site is required. This applies to both C3 and self-contained C2 residential developments, including older persons and student accommodation.**
- 4. Every opportunity will be taken to maximise the delivery of affordable housing within Bristol. The provision of Affordable Housing on the SDLs, and other strategic locations within or well related to the Bristol urban area, must contribute to the Affordable Housing need of Bristol through on site provision, with the option for off-site contributions in locations less well related to Bristol. Offsite contributions will be retained for the delivery of Affordable Housing within Bristol for a maximum of ten years or to the end of the JSP period whichever is the later.**
- 5. Where it is demonstrated that viability prevents the delivery of Affordable Housing policy requirement without public subsidy, the agreed quantum of Affordable Homes to be delivered without subsidy will be stipulated in the planning agreement. In these circumstances any reduced provision of Affordable Housing must still contribute to the affordable housing need of Bristol as set out in paragraph 4. Further mechanisms will be used to require the applicant to engage actively with the local authority to identify alternative forms of investment or public subsidy to deliver Affordable Homes above this base provision up to policy compliant, target levels.**
- 6. All Affordable Housing tenures should include provision to remain at an affordable price in perpetuity for future eligible households (based on local incomes and house prices) or for the subsidy to be recycled for alternative affordable provision.**

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Reasoned Justification for Policy 3

17. The Wider Bristol and Bath SHMAs identified an Affordable Housing need of 32,200 net new dwellings. Based on the Affordable Housing supply, available funding and other interventions an additional 24,500 (76%) Affordable Homes is set as the strategic target of this plan.
18. Affordable Housing is given a significant priority in the plan because of the scale of the need and historic low delivery rates. The target reflects the commitment by the Unitary Authorities to maximise Affordable Housing delivery across the West of England.
19. It will achieve this by:
 - Requiring a minimum of 35% Affordable Housing on all sites delivering 5 or more dwellings or sites larger than 0.2ha, whichever is the lower. This is justified by the high level of need and the shortfall in past delivery, and the consequent need to maximise delivery from all possible routes.
 - Maximising delivery via planning policy on site at nil public subsidy.
 - Maximising delivery via planning policy at nil public subsidy on the Strategic Development Locations (see Policy 7) as a specific priority.
 - Requiring policy compliance with the expectation that where it is unviable to provide the full policy requirement at nil public subsidy, public subsidy or other forms of investment will be sought and secured to make up the shortfall in order to demonstrate that every effort has been made to deliver full policy compliance.
 - Maximising use of HCA funding, other public subsidy and other forms of investment.
 - Requiring AH to be provided that meets the needs as evidenced by the Wider Bristol and B&NES Strategic Housing Market Assessments 2016 update or further updated evidence, in the full range of AH tenure types and unit mixes.
 - Maximising delivery through higher densities in urban locations.
 - Maximising delivery by reviewing and where appropriate, bringing forward sites for affordable housing that are currently allocated for other uses.
 - Requiring AH to be provided on self-contained C2 residential accommodation, including older persons housing and student accommodation, justified by the high level of need and the shortfall in past delivery, and the consequent need to maximise delivery from all possible routes.
 - Requiring on-site delivery of Affordable Housing. In exceptional circumstances, where it can be robustly justified, off-site provision or an equivalent financial contribution in lieu of on-site provision may be acceptable, for the provision of affordable housing.
20. In light of the particularly substantial need for Affordable Housing in Bristol, the provision of AH on the SDLs and other strategic locations within or well-related to the Bristol urban area must contribute to the affordable housing needs of Bristol via on-site provision with the option of off-site contributions in locations less-well related to Bristol. Delivery mechanisms will be determined through Supplementary Planning Documents options to be explored include:

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- nomination rights.
 - financial contribution to be held in a West of England Housing central fund and which can be retained for a maximum of ten years or to the end of the JSP period, whichever is the later, in order to maximise the opportunity to spend.
21. The 4 UAs have sought to maximise the provision of AH as far as possible, making it a priority in the formulation of the spatial strategy and increasing the overall supply of housing in order to increase AH supply. Whilst the identified needs for AH will not be fully met, this strategy will entail a substantial boost in the supply of Affordable Housing for the sub-region and will result in a step change in provision.

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POLICY 4: THE EMPLOYMENT LAND REQUIREMENT

The Joint Spatial Plan (JSP) supports the delivery of 82,500 additional jobs in the West of England between 2016 and 2036. The Plan seeks to enable access to employment opportunities for all through the spatial distribution of development.

Development in the following key strategic employment locations will ensure the continued economic growth of the West of England. The locations include:

Existing city and strategic town centres

- Bristol City Centre
- Bath City Centre, and
- Weston-super-Mare Town Centre

Enterprise Zones and Areas

- Temple Quarter Enterprise Zone
- Avonmouth Severnside Enterprise Area
- Filton Enterprise Area
- Emersons Green Enterprise Area
- Bath Riverside Enterprise Zone
- Somer Valley Enterprise Zone
- Junction 21 Enterprise Area, Weston-super-Mare

Key strategic infrastructure employment locations

- Bristol Port,
- Bristol Airport,
- Oldbury Power Station new nuclear build.

Additional employment opportunities are provided throughout the West of England in town, district and local centres, business and industrial estates.

These contribute to the stability of the sub-regional economy, and maintenance of employment land in these locations will be addressed through policy set out in the Local Plans. Improved accessibility to employment for residents in south Bristol, Bath and Weston-super-Mare will be supported through investment in sustainable transport infrastructure.

Strategic Development Locations (SDL)

In order to support the delivery of the employment growth required in the West of England, new employment land may be identified at the SDLs. The amount of employment land provided for at the SDLs will respond to the amount of residential development proposed and the context and scale of any existing community in the area. The delivery of employment land in the SDLs will be secured through allocation and policy detail in Local Plans, and through master planning and Supplementary Planning Documents as appropriate.

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Reasoned Justification for Policy 4

22. In order to support the continued economic growth of the West of England, the area will need to be able to accommodate an additional 82,500 jobs (c.69,400 Full Time Equivalents) between 2016 and 2036 (all use classes not just B Class use). This figure has been derived from the 2015 Medium High growth forecasts from Oxford Economics with a small uplift of 1.1%.
23. The growth in jobs will be supported by the portfolio of employment opportunities available across the West of England. The continued changes in the employment market mean that flexibility is required within the employment land portfolio, in order to respond to changes in market demand during the plan period and beyond.
24. The employment land requirement to support the delivery of employment growth has been assessed, and the Economic Development Needs Assessment (EDNA) has identified that existing employment land is sufficient to deliver strategic employment needs, and the anticipated jobs growth over the period to 2036. Whilst the EDNA identified some localised mismatches between supply and demand for example in some parts of the WoE such as the Avonmouth / Severnside area, within the single functional economic market of the West of England, the opportunities to satisfy economic and employment land needs exceed the requirements of the highest employment job forecasts. Although additional jobs will be delivered from the full range of employment types, the EDNA deals only with provision for office, industrial and warehouse uses ('B' class uses. This is consistent with the requirements of the NPPF and national PPG).
25. The employment potential of the strategic employment locations will continue to be reviewed to inform detailed policy formulation through each authority's Local Plan. The strategic focus for the increase in employment opportunity will primarily be within the Enterprise Zones and Enterprise Areas.
26. The overall strategy is to focus growth in City Centres and EZs which are sustainable locations and are successful business locations.
27. Whilst major growth in employment is targeted at these areas, additional growth opportunities for Port, airport and power station related activities, are recognised at 3 key strategic infrastructure employment locations, Bristol Airport in North Somerset and Bristol Port in North Somerset/Bristol, and Oldbury Power Station in South Gloucestershire. This is in response to the evidenced employment growth potential at these locations. Growth at Bristol Airport has the potential to create a range of new employment opportunities. However, significant growth in this location will require the delivery of improved public transport access from Bristol and Weston-super-Mare. In addition, the construction of Hinkley Point C in Somerset, though outside the plan area, will have a significant impact on business supply chains and labour markets across the West of England (e.g. as demonstrated by location of EDF headquarters at Bridgwater House, Bristol).
28. The Strategic Development Locations where appropriate provide for employment land, proportionate to the scale of development proposed and the proximity of the development to other employment provision, and local employment need. The detailed capacity of the SDLs may be further tested in the preparation of the Local

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Plans. Although there will continue to be growth opportunities throughout the West of England as a result of intensification of activity within existing local business and industrial estates, there are constrained opportunities for new employment land in south Bristol.

29. The clear priority for the development of brownfield land in the urban areas of the West of England will provide the opportunity for increased homes and employment using vacant or underused land. Key sites available for an increase in employment activity or for the release to housing land from employment use within Bristol City, the urban edge of Bristol within South Gloucestershire, and within Weston–super-Mare and Bath will be identified through the new the Local Plans.
30. Additional employment opportunities are provided throughout the West of England in town, district and local centres, business and industrial estates. These contribute to the stability of the sub-regional economy, and maintenance of employment land in these locations will be addressed through policy set out in the Local Plans.

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POLICY 5: PLACE SHAPING PRINCIPLES:

All new development must contribute towards the delivery of high quality and sustainable places. The following key principles should be used to inform the development and delivery of high quality and sustainable places to:

- 1. Create character, distinctiveness and sense of place which diversifies the residential offer, improves accessibility, affordability and enhances identity.**
- 2. Improve health and wellbeing and enable independence, reduce health inequalities, and facilitate social interaction where people can meet to create healthy, inclusive and safe communities.**
- 3. Enable inclusive and sustainable economic growth.**
- 4. Ensure the protection and enhancement of the natural, built and historic environment.**
- 5. Mitigate and adapt to climate change and use a catchment based approach to water management.**
- 6. Minimise energy demand and maximise the use of renewable energy, where viable meeting all demands for heat and power without increasing carbon emissions.**
- 7. Provide and ensure access to infrastructure including public transport, which reduces reliance on use of cars.**
- 8. Maintain and enhance the Green Infrastructure network to deliver multiple benefits for people, place and the environment.**

These Key Principles should be used to prepare the Strategic Development Locations (identified in Policy 2 and 7) concept frameworks and future master planning to be identified in local plans or other documents to secure a co-ordinated and comprehensively planned approach. They should also be used to support existing communities to ensure the delivery of sustainable urban living and regeneration led development.

The West of England local authorities through their local plans will build good working relationships with developers, infrastructure providers other agencies and local communities to achieve these key principles.

Reasoned Justification for Policy 5.

- 31. Place making is at the heart of achieving our ambition for the West of England for places that are environmentally, socially and economically sustainable. To support this, the Plan's vision and spatial strategy recognises the importance of working on key issues across boundaries whilst seeking to respect the character and identity of our individual communities and to make places more innovative, competitive, connected, diverse and healthy.**
- 32. To achieve these key objectives requires the leadership, ambition and co-operation of public, private and voluntary sectors. This is critical in order to shift expectations,**

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perceptions and devise new delivery models. To support this, key principles have been developed that ensure the JSP incorporates strategic priorities for economic, environmental and social sustainability. These accord with the 3 pillars of sustainable development and are intended to articulate the West of England's ambition and focus for creating high quality places that fulfil and realise these objectives.

Social

Policy Principle 1: Create character, distinctiveness and sense of place

33. The design, diversity and nature of housing in new developments is critical to their attractiveness as places to live and in establishing successful new communities. New development will demonstrate a high standard of design appropriate to their location. This should be inclusive enabling accessibility and independence helping to reduce health inequalities. A mix of housing typologies and tenures have a role to play in diversifying the residential offer, improving accessibility and affordability and enhancing identity and sense of place. This can link to new models of housing delivery provided by new small and medium sized enterprises (SMEs), such as self and custom build and build to rent. Projects at higher density and scale provide the potential for generating community energy and can help to alter perceptions about an area.
34. Having a sense of place requires that new development provides a clear sense of scale, density, and legibility, has strong landscape and multi-functional green and blue infrastructure features and the provision of a range of amenities and services. Connection to sustainable transport networks are important so that locations are accessible by means other than car travel. New development should provide places of interaction with, diverse local economies and a good standard of service provision such as education. In order to take this work forward, the WoE authorities will prepare an Urban living Supplementary Planning Document (SPD) to set out these principles.

Policy Principle 2: Improve health and wellbeing, reduce health inequalities, and facilitate social interaction where people can meet to create healthy, inclusive and safe communities.

35. The planning, design and management of places and homes has an impact on the health of both current and future generations. New development and infrastructure provide opportunities to improve public health and access to healthcare services. Such improvements can be direct, for example the installation of smart technology for independent living; or indirect by impacting on behaviour, for example provision of active travel options, improving safety and creating accessible spaces to encourage physical activity. The reduction of obesity by raising levels of physical activity has been shown to lessen the risk of physical and mental health issues and costs to health service providers.
36. Health inequalities, social opportunity and quality of life are differences between people or groups due to social, geographical, biological or other factors. These differences can have a huge impact, resulting in some people and groups experiencing poorer health and shorter lives. Development proposals must be

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informed by a holistic and evidence-based approach which considers how the current and future health needs of the population can inform the design and planning of new places.

37. Development proposals should:

- be planned to integrate transport and land use and recognise the opportunity to offer a variety of services and facilities including access to green space and nature. This includes places for leisure, social activity and business space and places, both inside and out, where people can interact.
- be fit for the future, incorporate alternative sources and resilience to a more variable climate.
- Support strong, vibrant and healthy communities, by creating clear urban design with a diversity of housing, flexibility of building uses and sufficient space for cycle paths and walkways, to the community's needs and support its health, social and cultural well-being.

Economic

Policy Principle 3: Enable inclusive and sustainable economic growth

38. The availability of land for business activity is important to the long-term sustainability of both our existing and new communities, as well as the performance of the local economy. Where development potential is identified, there is a risk that employment uses will be pushed out by the need for new homes and the values generated by residential development. However, whilst land should not be protected for employment use where there is little prospect of such use occurring, it is important that adequate provision for future change is made. This does not simply require the right quantum of floorspace but the provision of premises that can support a strong and productive economy.
39. To achieve this requires diversity of economic activity, enable business interaction and the retention and attraction of staff, provide for a range of flexible building types, including working from home. Development proposals should enable flourishing and successful economies by allowing for ideas to be generated, tested, developed and turned into services and products.
40. Where appropriate new employment opportunities should be provided at the strategic development locations with the form and type of development to be determined through local plans and SPD as appropriate.

Environment

Policy Principle 4: Ensure the protection and enhancement of the natural, built and historic environment

41. The West of England is bounded by natural features of international and national importance – the two limestone landscapes designated for their outstanding natural beauty - the Cotswolds AONB lies to the east and the Mendip Hills AONB to the south, the Severn Estuary is an international wetland habitat. A plethora of international and national sites of ecological importance also exist throughout the

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WoE, that are not confined to these landscapes. Topic Paper x sets out these assets. The West of England's numerous historic sites and features contribute significantly to the distinctiveness and sense of place of many communities.

42. These natural, built and historic environments provide a wide range of services that benefit our economy, and encourage visitors to the region whilst also providing health related benefits to our residents. Therefore it is crucial that new development works with natural systems, and is responsive to the distinctive historic and landscape setting of the sub region.
43. By working closely with our key environmental partners we have sought to establish a strong evidence base against which to recognise the wider benefits of ecosystem services, providing net gains to biodiversity, ensure areas of high landscape and visual sensitivity are respected, and the historical environment is conserved and enhanced. This will be used to ensure new development will:
 - Conform with planning legislation to ensure protection of Local to International designated sites (AONB, SNCI, SSSI, SAC, SPA, Ramsar sites) and should ensure enhanced protection through complimentary habitat creation to extend and/or buffer the site, implemented through the delivery of green infrastructure corridors.
 - Be expected to contribute towards a net gain of the sub-regions diverse and high quality natural environment and biodiversity ensuring that new development creates high quality sustainable places that deliver the integration, enhancement and protection of the sub-regions environmental assets.
 - Encourage opportunities to take a landscape-scale approach to improve the natural environments resilience and optimise the services they provide as demonstrated through the Severnside Wetlands Nature Improvement Area (NIA) and Bristol Avon Catchment.
 - In delivering Strategic Development Locations, policy requirements will incorporate provision for multi-functional green infrastructure as mapped in the Strategic Development Locations framework diagrams.
44. The vehicle to deliver an assessment of the West of England's key environmental assets will be delivered through a Green Infrastructure Plan for the West of England, supported by the 4 Unitary Authorities. The scope is set out in Topic Paper x.

Policy Principle 5 – Mitigate and adapt to climate change and use a catchment based approach to water management.

45. All development proposals will be required to demonstrate how long term climate resilience has been taken into account in the location and design of new development.
46. To increase resilience of the water environment to tidal, fluvial and surface water flooding the West of England authorities are committed to work in partnership on a

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catchment wide basis to achieve more holistic outcomes focused on multi-benefit projects across our administrative boundaries. A clear strategic priority is to increase investment opportunities for delivering improvements and adaption measures for water-based issues across the whole of the water catchment that falls within the Plan area, identifying new funding and delivery mechanisms to deliver positive change. These include reduced sedimentation of watercourses and associated maintenance costs, reduced risk of flooding and enhancement of the wider environment to improve the public realm through soft engineering solutions.

47. There is a need to work with wider partners including the EA and water companies to address adaption measures to respond to impacts such as drought and water shortages through schemes to manage water consumption. In working with wider partners development should positively contribute to managing the water environment by implementing a sustainable drainage strategy that adopts a catchment based approach to water management and which is integrated with the green infrastructure objectives to provide resilience against flooding.
48. To meet these objectives, the four West of England authorities will support the catchment wide action plan and its implementation.

Policy Principle 6: Minimise energy demand and maximise the use of renewable energy, where viable meeting all demands for heat and power without increasing carbon emissions:

49. The West of England Unitary Authorities are committed to improving energy security, address fuel poverty and to achieve an efficient low carbon economy. In addressing these challenges it is important for the West of England Authorities to contribute to and support the increased use and supply of renewable and low carbon energy in line with objectives and provisions of the Climate Change Act 2008, 2050 Carbon neutral targets. As such, the combined West of England CO2 reduction target is to reduce absolute CO2 emissions by 50% by 2035 from a 2014 baseline.
50. The scale of proposed development to be delivered through the JSP could generate significant additional CO2 emissions, making it harder to reach this target. To mitigate this, it will be necessary to maximise the energy efficiency of new development and integrate renewable energy technologies to supply the energy needs of new development in order to minimise energy demand. Technology continues to advance whilst costs fall and it is more cost effective to deliver efficient new buildings with renewable energy integrated from the outset than to retrofit them once they are built.
51. Through the production of the new Local Plans and supporting SPD, the potential for development to be built to a zero carbon standard, that is net zero emissions from regulated and unregulated heat and power, will be investigated using a

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consistent methodology across all four Unitary Authorities. Where viable, policies requiring zero carbon development or development that produces more renewable energy than it uses through opportunities including heat networks and other measures to support the delivery of environmentally sustainable development will be considered for inclusion in Local Plans.

Infrastructure:

Policy Principle 7 Provide and ensure access to infrastructure including public transport, that reduces reliance on use of cars

52. Strategic development should be in locations which maximise the potential to reduce the need to travel or, where travel is necessary, maximise opportunities to travel by sustainable, non-car modes, especially walking and cycling or be in places accessible to existing or new high quality public transport links. The focus of new transport infrastructure should address both existing challenges and create capacity for sustainable growth. New developments should also ensure that safe vehicle access is secured and appropriate local highway mitigations are identified and delivered.
53. Development should make provision of community infrastructure necessary to support the new development including provision of retail, education, health and sport and leisure. New services and facilities should be integrated with existing provision where appropriate.

Policy Principle 8 Maintain and enhance the West of England's Green Infrastructure network to deliver multiple benefits for people, place and the environment

54. Strategically planned and designed new green infrastructure and enhancing the existing green and blue infrastructure can provide a broad range of economic and social benefits that underpins the JSP's vision for sustainable growth.
55. In assessing the JSP Strategic Development Locations the four Unitary Authorities have taken account of the eight cross cutting Green Infrastructure objectives. Through the assessment of Green Infrastructure for the JSP strategic development locations, a framework for assessment has been created. This is intended to provide for a well-integrated, multifunctional public open space and green infrastructure network to provide a full range of formal and informal recreation opportunities (including allotments) and to help ensure the setting of local heritage and ecological assets are protected and enhanced.
56. This framework will help inform local plans to enable consistency within the design of all new development (urban living and non strategic as well as the SDLs), ensuring multi-functional green infrastructure objectives are incorporated and delivered.
57. Taking this work forward, the 4 West of England Unitary Authorities will devise and deliver a Green Infrastructure Plan (as referred to in principle 4) which will identify

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the West of England's key natural assets and the mechanisms for investment in those assets. It is envisaged that the Green Infrastructure plan will be the basis for identifying opportunities for enhancing and delivering Green Infrastructure and ecosystem services, both on and offsite, and prioritisation for large scale conservation management.

58. Through the delivery of a West of England Green Infrastructure Plan and Local Plans, issues will be addressed on a coordinated and strategic level, including any potential significant effects on Natura 2000 sites.

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POLICY 6 STRATEGIC INFRASTRUCTURE REQUIREMENTS

Strategic infrastructure will be required to support the effective implementation of the Joint Spatial Plan Spatial Strategy.

Transport infrastructure:

Working with delivery partners, the strategic transport infrastructure identified on the Key Diagram and in the West of England Joint Infrastructure Delivery Programme will be provided within the period 2016-2036.

Priority will be given to schemes which support the delivery of the spatial strategy as set out in Policy 2.

Provision will be made in the Local Transport Plan and local plans for an integrated corridor-based approach to transport improvements which supports sustainable and active travel choices and maximises the effectiveness of non-car modes.

Other strategic infrastructure:

New development must be properly aligned with the provision of the necessary strategic infrastructure. Additional strategic infrastructure identified to support the delivery of the spatial strategy is future investment in strategic flood management infrastructure at Avonmouth / Severnside, and on the River Avon in relation to Bristol City Centre. This is indicated on the Key Diagram. Other infrastructure will be identified where appropriate in the WoE Joint Infrastructure Delivery Programme and will be identified through local plans and local infrastructure delivery programs.

Reasoned Justification for Policy 6

59. The policy identifies the strategic development infrastructure requirements which are identified as being required during the plan period to deliver the spatial strategy. These are identified on the Key Diagram and set out in the Infrastructure Delivery Programme. These are the critical transport requirements, flooding and drainage improvements and mitigations. Energy infrastructure to support low carbon development and resilience to climate change such as the Avonmouth / Severnside Heat Network, with cross-border network requirements, will also come forward.
60. The requirement for an effective network of green infrastructure will be set out in local plans and other policy guidance and delivered through an integrated approach to new development. Other more localised infrastructure will also be required and this will be identified through local plans.
61. A WoE GI plan will identify and help to secure any GI required to support the delivery of the JSP and local plans. This would include addressing any potential significant effects on Natura 2000 sites, and other designated sites.

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62. Delivery of the strategic infrastructure in the Infrastructure Delivery Program will be ensured through joint working with delivery partners including Natural England, Environment Agency, Highways England, Network Rail, utilities companies and developers. The local authorities will explore a range of delivery mechanisms including the use of compulsory purchase powers (CPO) to make sure that essential infrastructure is delivered in step with new development.
63. Priority will be given to infrastructure delivery which is most effective in delivering the overall spatial strategy and, for example, tackling existing transport challenges, not just in respect of the new strategic development locations, but within the urban areas and at non-strategic locations across the plan area. Where infrastructure provision has cross-border or wider implications, the Unitary Authorities will work together to deliver the most effective solution through, for example, shared use of resources.

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POLICY 7 - STRATEGIC DEVELOPMENT LOCATIONS SITE REQUIREMENTS

The following Strategic Development Locations will be delivered during the plan period:

- **Bath and North East Somerset: North Keynsham, Whitchurch.**
- **Bristol: Land at Bath Road, Brislington.**
- **North Somerset: Backwell, Banwell Garden Village, Churchill Garden Village, Nailsea.**
- **South Gloucestershire: Buckover Garden Village, Charfield, Coalpit Heath, Thornbury, Yate.**

The guiding principles common to all the strategic development locations are set out in Policy 5 and the detailed location-specific requirements are set out in Policies 7.1 - 7.12.

The broad locations for the Strategic Development Locations are shown indicatively on the Key Diagram.

Reasoned Justification for Policy 7

64. As part of the overall spatial strategy to deliver the housing needs for the plan area, strategic development locations (ie locations capable of accommodating 500+ dwellings) have been identified for detailed assessment through local plans. These comprise 12 locations which are consistent with the sustainable development objectives of the Plan but also represent a variety of different areas and forms of development which will provide flexibility and choice over the plan period.
65. The broad locations for the strategic development locations are shown indicatively on the Key Diagram. The Joint Spatial Plan does not allocate these areas; it indicates their general extent which will be further assessed and refined through local plans. In order to provide strategic guidance for the detailed work to follow, the Joint Spatial Plan summarises the development principles, opportunities, constraints and infrastructure requirements to be taken into account. This includes the generic development principles which apply across the whole plan area, particularly the place-shaping principles set out in Policy 5, and also other aspects such as affordable housing targets contained in Policy 3. These principles apply equally to the Strategic Development Locations as well as to other locations.
66. While the starting point will be compliance with the broad principles set out in the main body of the Joint Spatial Plan, it is important to recognise that the individual locations will also have specific local issues, constraints and opportunities to take into account. These are important in terms of ensuring the retention and enhancement of local character and distinctiveness, and ensuring that necessary

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infrastructure and other mitigations are introduced in an appropriate and timely manner.

67. Policies 7.1 – 7.12 set out the bespoke requirements for each location which will form the starting point for their detailed assessment through the local plans. These are derived from the evidence prepared as part of the plan-making process and summarised in the supporting documents, particularly the Strategic Development Location templates. The requirements identified in the Joint Spatial Plan policies are not exhaustive and will evolve as detailed assessment and masterplanning takes place at these locations.
68. While the trajectories need to be further refined as the proposals are developed in more detail, the 12 Strategic Development Locations are currently anticipated to deliver approximate 17,377 dwellings by 2036, with the capacity for a further 4,350 beyond the plan period. In many locations delivery is linked to the delivery of essential infrastructure, particularly highways and transport. This means that in several of the identified locations development is not anticipated to commence until later in the plan period.

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POLICY 7.1 - NORTH KEYNSHAM**North Keynsham, Bath & NE Somerset**

Development at North and East Keynsham is shown on the Key Diagram. Development in this area should comply with the following key strategic principles and infrastructure requirements:

- The delivery of around 1,500 new homes, with 1,400 homes built in the plan period, optimising densities and including affordable housing.
- Include around 50,000 m² of employment floorspace.
- Creation of a new local centre to provide a focal point for the new community with an appropriate range of small-scale retail, services and facilities.
- A new primary school on site and financial contribution to the provision of a secondary education provision off site.
- New mixed tenure marina providing residential and leisure moorings.
- A layout and form that produces a high quality of urban design, contributes positively to local character and distinctiveness, and that mitigates impact on sensitive views (including key views from the Cotswolds Area of Outstanding Natural Beauty). This should incorporate a well-integrated, multifunctional green infrastructure network that includes new wetland features, restored floodplain meadows and new woodland.
- Provision of key transport infrastructure including:
 - i. North Keynsham multi modal link from Avon Mill Lane to A4. This new link will be designed as a street through the development, considering the needs of pedestrians, cyclists, public transport and vehicles, and capable of performing a wider strategic function for traffic relief in Keynsham. Development will have a positive relationship with the link road;
 - ii. Pedestrian and cycle connections in all directions which link the site with key services and facilities. These include Keynsham rail station, the town centre, the A4 public transport corridor, the A4175 Keynsham Road and the Bristol to Bath cycle path with the potential for new bridge connections across the River Avon;
 - iii. Where existing vehicle routes across the railway line are no longer required for continued use by motor traffic, seek to downgrade them to pedestrian and cycle only links;

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- iv. **Metrobus (high quality public transport) route from Bristol to Keynsham on the A4 corridor;**
- v. **High frequency local bus service following an orbital route connecting the site to the town centre, Metrobus, rail and other local bus services;**
- vi. **Improved passenger facilities at Keynsham rail station;**
- vii. **Off-site junction improvements including at Hicks Gate; and**
- viii. **Expanded or relocated A4 Bristol Park & Ride.**

No housing will be completed at the North Keynsham SDL ahead of the Avon Mill Lane to A4 link, Keynsham rail station improvements and Metrobus (high quality public transport) route from Bristol to Keynsham on the A4 corridor being completed. This should not prejudice a full Transportation Assessment which will be required for each location.

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POLICY 7.2 – WHITCHURCH

Whitchurch, Bath & North East Somerset

The development of land at Whitchurch is shown on the Key Diagram. Development in this area should comply with the following key strategic principles and infrastructure requirements:

- Around 2,500 new homes, optimising densities with 1,600 homes built in the plan period, including affordable housing.
- Provide retail, healthcare and community facilities, two new primary schools and a secondary school.
- Deliver environmental enhancements to Whitchurch village and its local centre.
- Retain the open gap between Whitchurch village and the Bristol urban area.
- Include employment spaces at a quantum and of a type to be determined through the Local Plan.
- Preserve and/or enhance the Queen Charlton Conservation Area, and the Maes Knoll and Wansdyke Scheduled Monuments and their settings.
- Provision of key transport infrastructure including;
 - i. Multi-modal link connecting A4, A37 and the south Bristol link road;
 - ii. Park and ride provision;
 - iii. Metrobus (high quality public transport) route from Bristol on the A4-A37 link;
 - iv. Pedestrian and cycle connections in all directions which link the site with key services and facilities. These include extending and improving walking and cycling routes to Bristol, Keynsham and to the countryside to the south; and
 - v. Off-site junction improvements including at Hicks Gate.

No dwelling will be completed at the Whitchurch SDL ahead of:

- i. Park and Ride, and
- ii. the multi-modal link A4-A37-south Bristol link including as a pre-requisite, the Callington Road scheme being completed.

The strategic infrastructure listed above should not prejudice a full Transportation Assessment which will be required for each location.

POLICY 7.3 – LAND AT BATH ROAD, BRISLINGTON**Bath Road, Brislington, Bristol**

The relocation of Brislington Park & Ride to land near Hicks Gate Roundabout within Bath and North East Somerset will enable the creation of a new neighbourhood within Bristol. Development in this area should comply with the following strategic principles and infrastructure requirements:

- Provision of at least 750 new homes;
- Mix of uses to be provided in accordance with masterplanning process;
- Retention and incorporation of hedgerows into development, including the hedgerows along Scotland Lane;
- The Sustainable Drainage Systems (SuDS) strategy will include surface water runoff management measures to remediate existing issues on the Scotland Bottom watercourse and Scotland Lane;
- Provision of a linear recreational park incorporating Scotland Bottom watercourse to allow for maintenance of the watercourse and the protection and enhancement of nature conservation. The park should include walking and cycling routes;
- Avoidance of unnecessary sterilisation of coal resources within the Minerals Safeguarding Area;
- Financial contributions to the provision of primary school places off site;

- The provision of key transport infrastructure in advance of development including;
 - i. Relocation of Brislington Park & Ride to land near Hicks Gate Roundabout within Bath and North East Somerset;
 - ii. Callington Road Link / A4 Rapid Transit Scheme;
 - iii. Widening of the A4 strategic road network corridor to provide public transport infrastructure inbound and outbound, and an adjacent strategic greenway providing walking and cycling paths with links across Bath Road, and a landscape frontage alongside the A4;

- Other transport improvements:
 - iv. A4 – A37 link, which may incorporate a MetroBus route;
 - v. Review the use of Scotland Lane, in light of delivering the A4-A37-south Bristol link, to reduce through traffic and provide walking and cycling facilities
 - vi. Extending and improving cycle routes to Bristol, Keynsham, and to the countryside to the south.

POLICY 7.4 - BACKWELL**Backwell, North Somerset**

Land to the west of Backwell is shown indicatively on the Key Diagram as the broad location to accommodate an extension to the village. The key strategic principles and infrastructure requirements are as follows:

- Delivery of an extension to Backwell village to create a sympathetic and well-designed development appropriate to its rural setting of around 700 dwellings including affordable housing.
- Lower densities will be expected on more sensitive parts of the site, including to safeguard heritage and ecological assets.
- Creation of new footpath and cycleways linking the site to the rail station, proposed MetroBus connections and local services and facilities.
- Improvements to the rail station to create a multimodal interchange including enhanced parking, facilitating increased frequency and capacity, accessibility and accommodating a MetroBus interchange.
- Local junction improvements will be required including at Station Road, and the A370 Backwell signalised junction.
- Provision of a primary school of at least 2.4ha to be located to maximise safe access from surrounding communities by walking and cycling.
- Protection of the settings of historic Chelvey and West Town Conservation Area and the need for sensitive treatment in respect of the setting of Grove Farm.
- Strategic approach to the assessment, safeguarding and enhancement of greater and lesser horseshoe bat habitat (particularly the Juvenile Sustenance Zone between the A370 and Chelvey Road), and Tickenham; Nailsea and Kenn Moor SSSI interests.
- Development should avoid the flood plain and demonstrate reduced run-off rates including through the use of attenuation ponds and other features as appropriate. Additional land may be required off-site to facilitate long term water storage as part of the sustainable drainage strategy.
- Development to be mitigated with the delivery of:

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- i. New multi-modal link from A370 Long Ashton Bypass to station interchange (including rail crossing), Nailsea SDL and Nailsea town centre, with connection to A370 west of Backwell (including rail crossing) and a new or improved connection to M5.**
- ii. New MetroBus route linking Bristol to Nailsea from Long Ashton Bypass to the station interchange (including rail crossing), Nailsea SDL and Nailsea town centre, and potential onward link to Clevedon.**
- iii. Opportunities to phase delivery of the highway improvements in step with parts of the development may be explored.**

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POLICY 7.5 - BANWELL GARDEN VILLAGE**NW of Banwell, North Somerset**

Land to the north west of Banwell is shown indicatively on the Key Diagram as the broad location to accommodate a new Garden Village. The key strategic principles and infrastructure requirements are as follows:

- Delivery of a new garden village to the north west of Banwell with its own character and sense of identity, whilst demonstrating sensitivity to the existing context for around 1900 dwellings including affordable housing.
- Creation of a new local centre to provide a focal point for the new community with an appropriate range of small-scale retail, services and facilities to complement existing facilities in Banwell.
- Potential for higher density at the local centre and other accessible locations.
- Creation of new footpath and cycleways connecting the garden village to Banwell, Weston-super-Mare and the nearby Weston Villages.
- Delivery of bus service improvements to Weston-super-Mare and Bristol including potential for MetroBus.
- Development will not commence until the construction of the Banwell Bypass is delivered as part of the M5 to A38 highway improvements with connection to a new M5 Junction 21a at a location to be confirmed, and onward connection to the Sandford/Churchill Bypass. Opportunities to phase delivery of the highway improvements in step with parts of the development may be explored particularly where delivery of infrastructure is directly within the land controlled by the developer. Development must not prejudice the delivery of future improvements to M5, including the construction of the new M5 junction.
- Local network and junction improvements including widening of Wolvershill Road.
- Provision of two primary schools one of at least 2.4ha and the other 3.4ha to be located to maximise safe accessibility from surrounding communities by walking and cycling. Provision for a new secondary school to serve the Banwell and Churchill SDL should be made with location to be confirmed through the local plan.

- **Strategic approach to the assessment, safeguarding and enhancement of greater and lesser horseshoe bat habitat including investigation of the potential to create a 'dark corridor' link through the development from open countryside around Stonebridge towards the Grumplepill Rhyne corridor.**
- **Development should avoid the flood plain and demonstrate reduced run-off rates including through the use of attenuation ponds and other features as appropriate. Additional land may be required off-site to facilitate long term water storage as part of a sustainable drainage strategy.**
- **Identification of around 5 ha of employment land primarily for B8 use class with good access to the M5 and new strategic transport infrastructure.**
- **As part of the approach to securing a multi-functional and interconnected green infrastructure, investigate the opportunity for an open setting along the northern edge of the existing village including potential for a nature reserve or other uses, with links out to open countryside to the east.**
- **Implementation of environmental improvements to the centre of Banwell following construction of the Bypass.**
- **Safeguarding of the setting of Banwell Conservation Area and protection and enhancement of the settings of listed heritage assets located both within and outside the historic core.**
- **Recognition that there are areas of high potential for archaeology which may require appropriate mitigation, particularly around Stonebridge and Wolverhill, and also between East Street and Riverside.**
- **Development form, and layout to respect the sensitivity of the location close to the Mendip Hills AONB.**

POLICY 7.6 – CHURCHILL GARDEN VILLAGE**NW of Langford and Churchill, North Somerset**

The area of search for development to the north west of Churchill and Langford is shown indicatively on the Key Diagram as the broad location to accommodate a new Garden Village. The key strategic principles and infrastructure requirements are as follows:

- Delivery of a new garden village to the north west of Langford with its own character and sense of identity for around 2675 dwellings including affordable housing. An additional 125 dwellings are estimated beyond 2036.
- An interconnected and multi-functional network of green infrastructure will be established, including the provision of an appropriate strategic (open space) gap between Churchill Garden Village and existing settlements.
- Development should avoid the flood plain and demonstrate reduced run-off rates including through the use of attenuation ponds and other features as appropriate. Additional land may be required off-site to facilitate long-term water storage as part of a sustainable drainage strategy.
- Protection and enhancement of local heritage assets and their settings, including Churchill Court unregistered park and garden and listed buildings at Churchill Green and Front Street.
- Creation of a new local centre to provide the heart of the new community with a range of retail, employment, services and facilities.
- Potential for higher densities at the local centre and other accessible locations, and reduced densities on the fringes of the development to provide a soft edge and setting for the new community.
- Creation of new footpath and cycleways linking the new community with existing settlements and facilities including access to the Strawberry Line.
- Package of highway schemes including a new M5 junction, Banwell Bypass, Sandford/Churchill Bypass and capacity improvements to A38/A368 junction. Bus service improvements to Bristol and Weston-super-Mare, including the potential for Metrobus.

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- **Provision of three primary schools of at least 2.4ha each to be located to maximise safe access from surrounding communities by walking and cycling.**
- **Strategic approach to the assessment, safeguarding and enhancement of greater and lesser horseshoe bat habitat. Investigation and implementation of a green corridor through development linking from open countryside to the west to Windmill Hill to areas south of Langford and beyond to the Langford Brook.**
- **Identification of around 7.4 ha of employment land. Employment land to be located in close proximity to new highway link and will provide business opportunities in the B Use Class.**
- **Development form, and layout to respect the sensitivity of the location close to the Mendip Hills AONB.**
- **Windmill Hill to be retained as a focal green feature for ecological, recreational and landscape value. It also has archaeological significance as a location for the remains of Iron Age settlement.**

POLICY 7.7 – NAILSEA**SW Nailsea, North Somerset**

Land to the south west of Nailsea is shown indicatively on the Key Diagram as the broad location to accommodate a new extension to the town. The key strategic principles and infrastructure requirements are as follows:

- Delivery of an extension to the south west of Nailsea with its own character and sense of identity for around 2575 dwellings including affordable housing. An additional 725 dwellings are estimated beyond 2036.
- Creation of a new local centre to form the heart of the new community with a range of retail, employment, services and facilities, but of a scale and type which is complementary to Nailsea town centre which will remain the main centre.
- Higher densities at the local centre and at accessible locations, particularly along the proposed MetroBus route and lower densities towards the western edge of the development.
- Creation of new footpath and cycleways linking the new local centre with residential areas, locations within Nailsea and the rail station and public transport services.
- Development to be mitigated with the delivery of:
 - i. New multi-modal link from A370 Long Ashton Bypass to station interchange (including rail crossing), new development area and Nailsea town centre, with connection to A370 west of Backwell (including rail crossing) and a new or improved connection to the M5.
 - ii. New MetroBus route linking Bristol to Nailsea from Long Ashton Bypass to the station interchange (including rail crossing), new development area and Nailsea town centre, and onward link to Clevedon via M5 J20 link.
 - iii. Opportunities to phase delivery of the highway improvements in step with parts of the development may be explored.
- Local junction improvements including Station Road, and A370 Backwell signalised junction.
- Provision of a secondary school of 8 ha and four primary schools of at least 2.4ha each, located to maximise safe access by walking and cycling.

- **Strategic approach to the assessment, safeguarding and enhancement of greater and lesser horseshoe bat habitat, and Tickenham; Nailsea and Kenn Moor SSSI interests. This includes investigating the potential for a dark corridor through the new development linking habitats at Backwell through to open countryside to the north and at Batch Farm Meadow wildlife site.**
- **Protection of heritage assets and their settings particularly listed farm buildings in the area whose settings should be addressed through a sensitive green infrastructure strategy.**
- **Long-term water storage and other measures are likely to be required as part of a sustainable drainage strategy, as well as reduced run-off rates to surrounding area. Measures to ensure water quality and levels are not adversely impacted on the nearby Tickenham Moors SSSI must be in place.**
- **The separate identity and character of Nailsea and Backwell will be retained through the provision of an appropriate Strategic Gap.**
- **Improvements to the rail station to create a multimodal interchange including enhanced parking, facilitating increased frequency and capacity, accessibility and accommodating a MetroBus interchange.**
- **Consideration of relocation/undergrounding of existing pylons.**
- **Identification of around 10.5 ha of employment land well-connected to the railway station, local centre and Metrobus route. Investigate the potential for a new office park close to the railway with optimum travel links.**

POLICY 7.8 -BUCKOVER GARDEN VILLAGE**Buckover, South Gloucestershire**

A Garden Village will be developed on land either side of the A38 at Buckover (east of Thornbury) as shown indicatively on the Key Diagram.

An appropriate delivery body, including the land value capture, ownership and management of assets, long-term stewardship and governance arrangements (for the benefit of the community), land uses, master planning and detailed design principles will accord with Garden City principles and shall be agreed with the Council following consultation with the local community, Parish and Town Councils and other relevant stakeholders.

These principles will be set out in a new Local Plan policy and other planning policy documentation and delivery agreements as appropriate.

The Garden Village should also comply with the following key strategic objectives and infrastructure requirements:

- **Provision of around 3,000 dwellings (including affordable homes), to be delivered by a full range of providers and of a wide range of types and tenures, complementing existing predominant house types in the local area. At least 1,500 will be delivered within the plan period. The homes will be innovative, of high quality design, spacious and well-planned, meeting Nationally Described Space Standards as a minimum.**
- **A new Local Plan policy will establish an appropriate policy designation to ensure a permanent strategic gap between the new Garden Village and Thornbury.**
- **A Green Infrastructure network will also be established to ensure a permanent and robust landscape edge to the western boundary of Buckover Garden Village, Ridgewood and the setting of local heritage and ecological assets are protected and local food production is given emphasis within the new settlement.**
- **Provision of and support for a range of retail, community & cultural facilities in the Garden Village and potentially other nearby communities to complement existing local provision.**
- **Provision of a primary school and 3-16 all through school and nursery(s).**
- **Provision of around 11 ha of employment land to provide a range of local employment opportunities, including provision for start-up, SMEs and larger businesses.**
- **Embedding of zero-carbon and energy positive solutions throughout the planning, design and delivery process across the whole settlement.**

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- **Provision of a strategic transport package including as appropriate delivery of or contributions towards: Metrobus Extension to Thornbury & Buckover GV, A38(N) Park & Ride, M5 J14 improvements, Charfield rail station re-opening, local bus service improvements (including new local shuttlebus to Thornbury), strategic and local cycle and pedestrian connections to Thornbury and other local highway network improvements as necessary.**
- **Consideration will also be required to ensure the A38 can continue to act as an effective relief road to the M5 without detriment to the new resident's health & wellbeing.**

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POLICY 7.9 - CHARFIELD**Charfield, South Gloucestershire**

Land at Charfield will comprise a number of major interdependent development areas around the village. Development of these separate land parcels should be undertaken in a co-ordinated manner to ensure Charfield becomes a more sustainable settlement.

New development should also comply with and or contribute towards the following strategic principles and infrastructure requirements:

- Provide around 1200 dwellings, including affordable housing, to be developed within the plan period. New housing should expand the range of types and tenures available in the village.
- The future role and function of existing retail and community assets and remaining greenfield land parcels within the centre of the village adjoining the Wotton Road will firstly be reviewed in consultation with the local community to ensure future needs are assessed, new and existing facilities make the most efficient use of land and they assist to maximise the sustainability of the expanded village.
- Replacement of the existing primary school with a new 3FE school in a central village location and contributions to delivery of an expanded secondary school in the locality, and or the delivery of a new all through 3-16 school at Buckover Garden Village.
- New and/or improved retail and community facilities.
- A minimum of 5 ha of new employment land (traditional B-use classes) distributed within the development areas at appropriate locations.
- The new development will provide or contribute to a strategic transport package including: M5 J14 improvements, Charfield rail station re-opening, local bus services, a comprehensive Wotton Road environmental enhancement scheme, new and improved foot and cycle connections through the village and to key local destinations such as Renishaws, KLB school and Wotton-under-Edge, and including a new Charfield circular public right of way route.
- A Green Infrastructure network will enhance and protect the Little Avon River and its flood zone, the setting to Elbury Hill and St James' Church, local SSSI, SNCIs and other Listed Buildings, as well as soften views from the AoNB.
- Reinforcement of the sewerage network and treatment works.

POLICY 7.10 - COALPIT HEATH**Coalpit Heath, South Gloucestershire**

Land to the east of Coalpit Heath will deliver a new neighbourhood that responds positively to the locality's rich mining heritage and visually prominent aspect. The new neighbourhood should also comply with the following key strategic principles and infrastructure requirements:

- Provide around 1800 dwellings, including affordable housing, to be developed within the plan period.
- Provide a new local centre incorporating a new primary school, local retail outlet, & community facility/hub, and a second primary school (subject to further testing) plus contributions to a new or expanded secondary school in the wider locality.
- Incorporate up to 5ha of employment land (B-use classes)
- Provide or contribute to a strategic transport package including: Metrobus extension to Yate and Chipping Sodbury, A432 Park and Ride, Yate Rail Station enhancement, the Winterbourne and Frampton Cotterell Bypass, strategic cycle route and local bus services. Vehicular access will be off Badminton Road/Frog Lane, Roundways and Woodside Road.
- Establish a Green Infrastructure network that will reinforce a new Green Belt boundary along the rail cutting, provide attractive routes through the site to the nearby countryside (including along the historic Dramway), break up development impact along the ridgeline and protect the setting of nearby Listed Buildings.

POLICY 7.11 – THORNBURY

Thornbury, South Gloucestershire

Land at Thornbury around the town's north and eastern edge off Butt Lane & Morton Way should comply with the following key strategic principles and infrastructure requirements:

- **A maximum of 500 dwellings, including affordable housing, to be developed within the plan period.**
- **The new Local Plan will establish an appropriate policy designation to ensure a permanent strategic gap between Buckover Garden Village and Thornbury.**
- **Around 5ha of additional employment land on land at Crossways east of Morton Way, sensitively designed to respect the rural nature of the locality.**
- **Incorporate a new convenience store/retail or community opportunity and new and enhanced public open space.**
- **Establish a Green Infrastructure network that will protect Crossways & Cleve Wood, the setting of Hacket Farm, rural nature of Hacket Lane, Clay Lane & Crossways Lane, include SUDs features at Crossways to manage potential flooding at Crossways, and extend the Picked Brook Rhine streamside walk.**
- **Development will also make financial contributions towards local and strategic transportation schemes, including potentially: Metrobus Extension to Thornbury (& Buckover GV), A38(N) Park & Ride, M5 J14 improvements, Charfield rail station re-opening, local bus service improvements, local highway, foot and cycle improvements.**

POLICY 7.12 – YATE**Yate, South Gloucestershire**

Land at Yate comprising two broad locations to the northwest and west of Yate will deliver a new residential neighbourhood and employment area which should comply with the following key strategic principles and infrastructure requirements:

- A minimum of 2,000 dwellings, including affordable housing, of which at least 1,000 will be delivered within the plan period.
- Provide a new high quality, high density, mixed-use residential neighbourhood at NW Yate that improves connections through a regenerated Beeches Industrial Estate and to the rail station.
- The residential neighbourhood will contain a new local centre including a primary school(s) and/or all through 3-16 school, local retail and community facility/hub.
- A significant new employment land allocation totalling approx. 30ha will also be allocated at West Yate, of which, approximately:
 - 11ha of land south of Badminton Road will be allocated for B1 and B2 office/light industrial and research use; and
 - 19ha of land between the railway tracks off the Westerleigh Road will be allocated for B2/B8 and similar uses.
- The new development areas will provide or contribute to a strategic transport package including: Metrobus extension to Yate and Chipping Sodbury, strategic cycle route, A432 Park and Ride, Yate Rail Station enhancement, Winterbourne and Frampton Cotterell Bypass and local bus services. An on-site rail crossing and a new rail bridge is also likely to be required across the Nibley Lane.
- A Green Infrastructure network will reinforce a new Green Belt boundary, protect the river valley, linear settlement of Engine Common and Nibley Village, provide an attractive segregated route along the Frome Valley Walkway, and enhance North Road and the Frome river corridor through the Beeches Estate.
- The historic parliamentary enclosures, which comprise small to medium sized fields, reinforced by a strong mature hedgerow network and large number of trees, north of Mission Road and east and west of North Road will also be protected by a new landscape and or Green Belt designation which will be confirmed through the new local plan.
- Plus, early consideration of appropriate powers devolved to the West of England to enhance the prospect of land assembly, infrastructure

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delivery and the regeneration of existing industrial areas so also assisting bring forward a well planned and connected new residential development.

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CHAPTER 5 DELIVERY AND IMPLEMENTATION

1. The authorities recognise that the policies in this Plan are applied consistently across the plan area and used to inform local plan reviews. Whilst most of the actions required are the responsibility of or within the control of the authorities it is acknowledged that some rely on action from statutory agencies and delivery partners. These include: the Homes and Communities Agency, Highways England, Network Rail, Environment Agency, the Local Nature Partnership, infrastructure providers and the development industry. The West of England authorities through the Duty to Cooperate will continue to work with these organisations.
2. The West of England has a Strategic Solutions Panel comprising the key delivery agencies and has worked closely with neighbouring authorities in the production of the JSP. The JSP is supported by an evidence base on infrastructure delivery as set out in Topic Paper x.
3. The governance structure, within which joint working in the West of England operates, facilitates meeting the duty to co-operate. The four local authorities have a history of close joint working. Previously this was under the Planning Homes and Communities Board. There is now a formally constituted Joint Committee (Leaders/Mayor) and an Infrastructure Advisory Board (constituted of Cabinet Members and a business representative), to take a coordinated approach to Transport and Planning. These meetings are held in public as required to ensure transparency and accountability. The nature of the ongoing work to meet the duty to cooperate is set out in the duty to cooperate schedule which is reported to the Infrastructure Advisory Board.

Funding

4. The scale of the challenge means that delivering the JSP will require a multi-agency approach. The West of England Authorities recognise that our potential can only be achieved through collaborative working, and finding new ways and models of delivery such as compulsory purchase powers, in which we can secure the investment required to stimulate growth.
5. The JSP sets out our delivery priorities and seeks to influence decision making on investment (securing funding and directing that funding obtained) by internal and external decision makers.
6. In the West of England working closely with the Local Enterprise Partnership the four authorities operate a joined up approach to funding. This is a single pot which includes the revolving infrastructure fund, city deal funding and growth deal funding. In 2016, the three Authorities of Bath and North East Somerset, Bristol and South Gloucestershire agreed a devolution deal with Government and the West of England Combined Authority was established in 2017. As part of

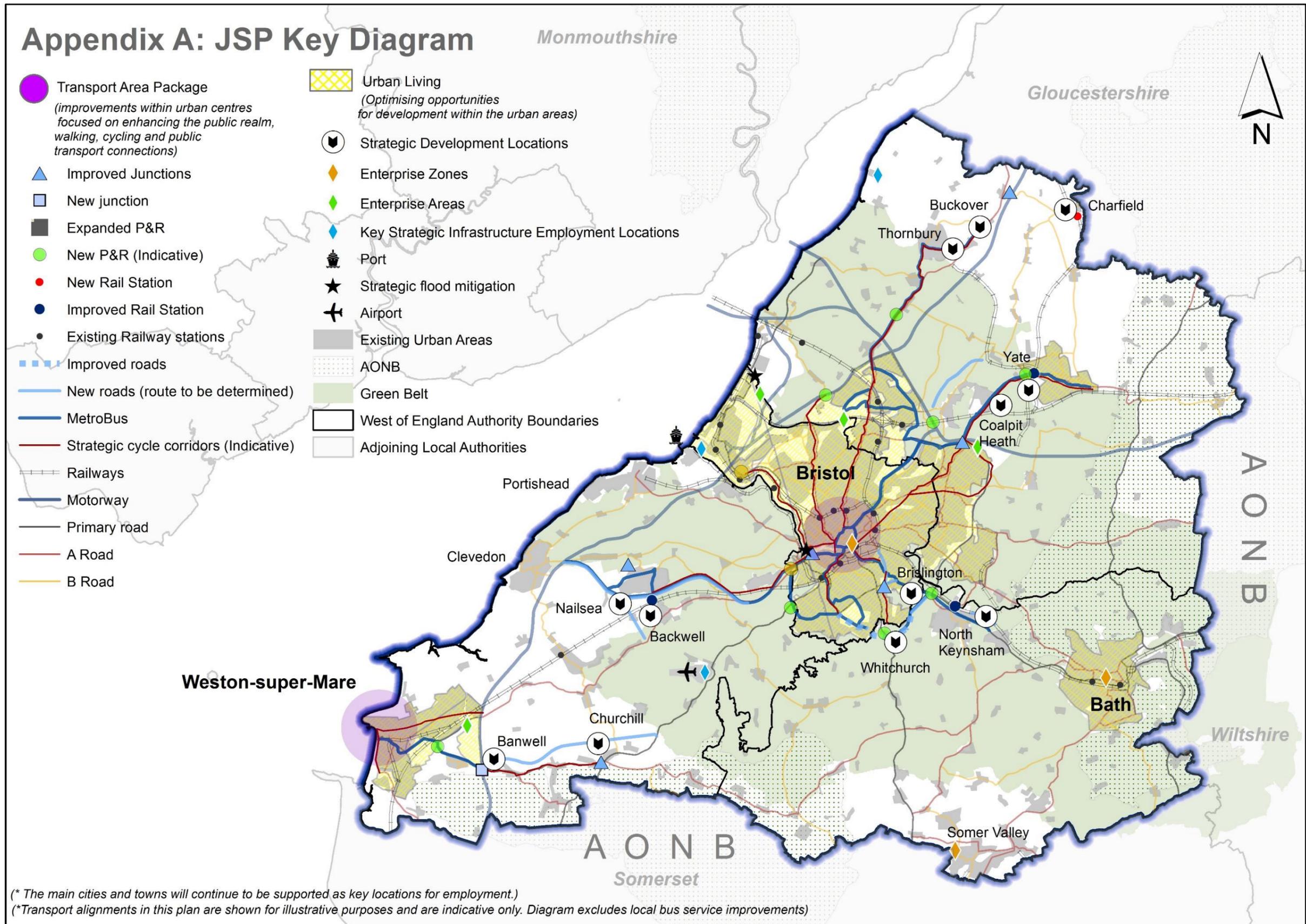
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devolution, Government devolved funds of some £900m investment (£30m per annum over 30 years) to the Combined Authority to assist in supporting priority infrastructure schemes. This includes schemes coming forward to support the JSP development locations.

7. Infrastructure delivery will be enabled through the most appropriate blend of funding and a range of funding mechanisms from the West of England and our partners. The principle of funding development is an equitable share of costs between the public and private sector.
8. Different sources of funding will be proactively sought and brought together. This enables a co-ordinated, targeted approach to investment, often with investment in infrastructure up front, to assist in 'unlocking' locations/sites in a timely and co-ordinated manner to achieve the most development potential. Where appropriate and necessary we will actively look to use Compulsory Purchase Powers (CPO) to undertake land assembly and to resolve barriers to the delivery of new homes, jobs and supporting infrastructure.
9. Positive planning in this way will support opportunities to accelerate sustainable growth. The JSP aims to direct investment to our shared strategic development locations, to seek alignment with other agencies capital investment programmes and to collaborate with the development industry, to assist in implementing the Plan.

Monitoring

10. The preparation of the JSP has been informed by a supporting evidence base. The JSP will steer local plan reviews. Once adopted local plans will continue to be informed, monitored and reviewed so that they may respond to changing needs and circumstances.
11. Information on monitoring of the JSP is expected to be reported through joint or individual Council's Authority's Monitoring Reports.
12. Each authority will: -
 - undertake a consistent and jointly agreed process of monitoring which will identify changes in stock, the contributions of different sources of supply, changes in housing requirements, and the provision of necessary infrastructure and services; and
 - in considering the release of sites for housing through local plans, take account of progress in implementing the Plan's proposals across the Joint Spatial Plan area as a whole, including its neighbouring authorities.



ITEM: 8

**REPORT TO: WEST OF ENGLAND COMBINED AUTHORITY OVERVIEW
AND SCRUTINY COMMITTEE**

DATE: 24 October 2017

**REPORT TITLE: COVER PAPER ON FUNDING FOR INFRASTRUCTURE
FEASIBILITY STUDIES**

**AUTHOR: CHRIS JENNINGS, WEST OF ENGLAND COMBINED
AUTHORITY**

Purpose of Report

- 1 To appraise the Scrutiny Committee of the forthcoming formal investment request to fund feasibility studies and the development of business cases for strategically important infrastructure schemes within the West of England Combined Authority area that will be considered at the WECA Committee on the 30th October.
- 2 The last WECA Scrutiny Committee on 22 September 2017 was advised that it was likely the WECA Committee at the end of October would be considering proposals for investment decisions. The paper detailing the proposals will be published on the 20th October as it is still being finalised. It will be shared with the Scrutiny Committee as soon as it is published.

Introduction to the upcoming investment decisions

- 3 The WECA Committee asked officers to consider whether there were any schemes suitable for an investment decision prior to the full prioritisation process being developed, in recognition that developing a fully funded investment programme for other regions has taken more than 18 months.
- 4 The schemes proposed to the WECA Committee are aimed at addressing key strategic issues in the region including improving transport infrastructure and unlocking housing and employment sites in areas that need it most. They also deliver against political ambition and have been approved by the Mayor and Leaders of the constituent councils.
- 5 If the Committee approves the schemes, we will kick-start the delivery process, initiating schemes which will alleviate the most pressing challenges in the region. This initial package of investments will provide certainty to our stakeholders that we are delivering on the region's strategic aims.

- 6 In addition, by investing devolved funds towards taking forward these infrastructure schemes, the Combined Authority is demonstrating its commitment to delivering the JSP and JTS which will add weight to potential bids for further central funding.
- 7 As discussed with you we are keen to ensure your views can be taken into account by the WECA committee before it makes its decision in line with your terms of reference and good governance.
- 8 The Infrastructure Advisory Board will also be given the opportunity to view the proposals and provide comment ahead of the WECA Committee on the 30th October.

Recommendation:

- 9 That the WECA Overview and Scrutiny Committee notes this update and provides comments on the WECA Committee report on infrastructure funding (which will be shared with members on the 20th October) at its meeting on 24th October.

Report Author: Chris Jennings

Telephone: 0117 428 6210

West of England Combined Authority Contact: Chris Jennings

ITEM: 11

REPORT TO: WEST OF ENGLAND COMBINED AUTHORITY

DATE: 30 October 2017

**REPORT TITLE: AGREE BUSINESS CASE FUNDING FOR
INFRASTRUCTURE PROJECTS**

**AUTHOR: CHRIS JENNINGS, WEST OF ENGLAND COMBINED
AUTHORITY**

Purpose of Report

- 1 To seek approval for funding feasibility studies and the development of business cases for strategically important infrastructure schemes within the West of England Combined Authority (WECA) area.
- 2 To seek approval to procure and part-fund a new and improved Real Time Information system.

Issues for Consideration

- 3 The West of England Joint Spatial Plan (JSP) and supporting Joint Transport Study (JTS) identify a significant amount of infrastructure that needs to be delivered to support the West of England's (including North Somerset) ambition to improve the region for residents and support current and future economic growth. This paper recommends funding feasibility studies and business case development for a number of schemes that will deliver important regional improvements that will contribute towards realising this ambition within the Combined Authority area.
- 4 There is a need to make this investment decision now to progress key schemes to address transport issues and ensure housing and commercial developments can be delivered in a timely manner. Whilst the feasibility studies relate to exploring schemes at an earlier stage of development, the schemes proposed for business case development, subject to those business cases being approved, will assist the creation of jobs and homes, including: 2000 jobs in the Somer Valley Enterprise Zone; 800 new homes at Lockleaze and circa 2000 more at Hengrove and will connect circa 8000 new homes to employment and infrastructure in the Filton Enterprise Area. These schemes would be expected to be completed by Winter 2022.
- 5 The first proposed investment in scheme delivery is presented for approval to procure a new and improved Real Time Information (RTI) system to enhance the quality and reliability of information for bus passengers across the region. The upgrade will, in turn, help to deliver economic growth for the area, including to the development locations in the Joint Spatial Plan. A Full Business Case is set out in Appendix E.

- 6 These schemes all contribute to delivering the region's strategic aims of:
- Improving connectivity in the region to increase access to jobs, reduce congestion and promote sustainable transport choices;
 - Finding ways of increasing the availability and affordability of a range of housing types creating communities where people want to live and work; and
 - Enabling employment space to provide opportunities that suit the needs of businesses at all stages
- 7 In addition, by investing devolved funds towards taking forward these infrastructure schemes, the Combined Authority will demonstrate its commitment to delivering the JSP and JTS adding support to its dialogue with the Government seeking additional support for the delivery of housing or improving transport infrastructure.

Strategic Transport Schemes

- 8 A key priority for the Combined Authority is to solve strategic transport issues in the region that will: deliver inclusive economic growth, make it easier for people to get around 'cleaner and greener'; and cut congestion. The first package of schemes proposed is to carry out a range of feasibility studies on key regional routes and arteries including a Southern Orbital route, initial feasibility studies for mass transit in the region and connections to the A38 corridor and taking forward the development of Temple Meads Station as the major rail gateway to the West of England. These schemes are listed in Appendix A, with more details on each scheme in Appendix D.

Housing & Employment Schemes

- 9 The second package of schemes will enable development of key housing and employment sites in the region. These schemes have been selected on the basis that they are regional and local authority priority schemes that support key strategic aims and can be delivered quickly. The schemes will deliver a range of improvements in the region including: unlocking key housing sites and opening up employment sites. Details of the priority schemes are in Appendix B with further detail in Appendix D.
- 10 In line with the West of England Combined Authority Assurance Framework the appropriate development proforma have been completed and are attached at Appendix D. Full Business Cases for these schemes will be reported back to WECA for a final approval decision and award of full funding.

Real Time Information Enhancement

- 11 WECA is responsible for the production of a bus information strategy and the provision of bus information. Real Time Information (RTI) and the TravelWest website are currently managed by Bristol City Council (BCC) on behalf of the four councils (including North Somerset).
- 12 Given the need to ensure a consistency of service provision the WECA meeting in March agreed that the three councils be commissioned to continue to deliver these services in 2017/18 with Bristol City Council continuing to lead on the re-procurement of the RTI contract.
- 13 WECA will be the procurement body for the new contract under its passenger information obligations. Due to the lead times involved in providing this there is an urgent need to confirm funding to enable the procurement to proceed and to avoid any lapse in service.
- 14 The WECA Investment Fund would cover the first year capital cost, with subsequent revenue funding provided by the councils via the Transport Levy to cover maintenance costs in the contract price.

- 15 In line with the West of England Combined Authority Assurance Framework a Full Business Case is attached at Appendix E for approval. The assurance framework requires all Full Business case to be subject to independent review although it has not been possible to complete this review in time for this meeting. It is requested that the resolution of any issues arising from the review of this Business Case are signed off by the Chief Executive in consultation with the Mayor.

Consultation:

- 16 Engagement has taken place with officers in the West of England Combined Authority Constituent Unitary Authorities throughout the development of these proposals.
- 17 Both the West of England Infrastructure Advisory Board and the West of England Combined Authority Oversight & Scrutiny Committee will have met and consider this paper and any views will be presented to the Combined Authority at the meeting.

Public Sector Equality Duties:

- 18 As a body exercising public functions the West of England Combined Authority is under an obligation to have regard to the public-sector equalities duty (PSED) under section 149 of the Equality Act 2010 when exercising its functions. The immediate decisions primarily relate to the funding of business case development rather than decisions that could be deemed to impact on the rights of groups or individuals with a protected characteristic or others protected under the PSED.

Economic Impact Assessment:

- 19 The economic impacts of the schemes will be developed as part of business case development.

Finance Implications:

- 20 It is proposed that up to £3.395m of capital and £3.15m of resource be made available to deliver feasibility studies, produce full business cases for the schemes set out in Appendix D and for the delivery of RTI Enhancement as per the business case set out in Appendix E.
- 21 The ongoing revenue impact of the RTI contract as set out in the business case will need to be considered as part of future year arrangements for the transport levy
- 22 In order to align funding with the relevant budget powers and responsibilities, it may be necessary for the funds to be transferred from the WECA Budget to the Mayoral Budget from where the grant funding will then be made available.
- 23 It is proposed that finalisation of the relevant grant funding arrangements for the delivery of the Business Cases be delegated to the Chief Executive in consultation with the Mayor, to include all relevant milestone reporting and performance monitoring requirements.
- 24 The Committee may in future wish to make additional investment decisions, for example, for projects relating to skills and business support as well as additional infrastructure projects.
- 25 A summary table of requested funding is included in Appendix C.

Advice given by: Tim Richens, Director of Investment and Corporate Services

Legal Implications:

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

Advice given by: John McCormack, Interim Monitoring Officer

Land/Property Implications;

27 Any land/property implications will be identified and analysed as part of the business case development.

Human Resources Implications:

28 No HR implications arise as a result of this report.

Recommendation:

Feasibility & Business Case approval

29 That the WECA approves a sum of up to £0.75m capital and £0.675m resource in 2017/18, £1.615m capital and £2.375m resource in 2018/19 and £0.43m capital and £0.1m resource in 2019/20 to support the costs for the development of feasibility studies and business cases for priority infrastructure schemes within the Combined Authority area.

30 That the Mayoral Budget be amended to include provision of up to £3.15m of resource and £2.795m of capital to provide grant funding of costs to deliver the feasibility studies as business cases for the schemes as set out in Appendices A and B.

31 That the Chief Executive in consultation with the Mayor be delegated responsibility for making appropriate arrangements for grant funding the constituent council(s) for the delivery of this work as set out in Appendix D.

Real Time Information

32 That, subject to available budget, following a competitive price and quality based procurement process, appoint the preferred contractor to provide an expanded and upgraded RTI system.

33 That the WECA approves a sum of up to £0.6m to be allocated to support the costs for the delivery of Real Time Information enhancement as per the Full Business Case set out in Appendix E.

34 That the Chief Executive in consultation with the Mayor be delegated responsibility to sign off the resolution of any issues arising from the review of this Full Business Case.

35 That the WECA note that from 2019/20 there will be a revised operating cost which is expected to impact on the transport levy at that time.

Report Author: Chris Jennings

Telephone: 0117 428 6210

West of England Combined Authority Contact: Chris Jennings

Appendix A - Strategic Transport Feasibility

Scheme description	Lead Organisation	Detail
Orbital route	Bristol City Council	<ul style="list-style-type: none"> - This scheme comprises a combination of new links and improvements to existing highway, between Whitchurch and Hengrove. - It would link up new housing opportunities at Whitchurch as set out in the Joint Spatial Plan, and support regeneration in South Bristol. - The proposed orbital transport corridor will include provision for dedicated MetroBus lanes and a footway / cycleway and link to a new Park and Ride site at Whitchurch in addition to a connection to the A38 towards Bristol Airport. - It is also important to note that this project will look to improve existing routes such as the South Bristol Link as well as provide the new routes as set out above. - This initiative would undertake a feasibility study to inform development of Outline and Full Business Cases.
Mass Transit and Strategic Connections to A38 South Corridor options	Bristol City Council	<ul style="list-style-type: none"> - The JTS recommended four mass transit corridors linking Bristol city centre with Bristol Airport, the North Fringe, the East Fringe and via the A4 corridor to Hicks Gate/Keynsham. - A West of England Mass Transit scheme would provide a step change in public transport connectivity: unlocking sub-regional growth and making the West of England an even better place to live, work, visit and enjoy. The scheme would dramatically cut travel times in the region and cut congestion, whilst enabling housing and public realm improvements. - This initiative would fund an initial pre-feasibility study followed by procuring a full feasibility study, considering potential alignments (including whether the A4 route stops at Hicks Gate or Keynsham), technology options for the network, assessment of benefits and risks, engagement with stakeholder groups, and other details to move forward to the next step towards delivery. - This study will link in with the existing A38 south corridor study currently underway led by North Somerset Council. - This package will also fund initial feasibility work to explore underground options for the mass transit study prior to the main study.
East of Bath Link	Bath and North East Somerset Council	<ul style="list-style-type: none"> - The construction of a link road east of the city of Bath has been identified in the Bristol/Bath to South Coast Transport Study (2004) the Greater Bristol Area Strategic Transport Study (2006) and most recently in the Joint Transport Study.

		<ul style="list-style-type: none"> - This feasibility study will allow the development and promotion of a prospectus for North South Connectivity. This will form part of the compelling case to encourage the Secretary of State for Transport to mandate Highways England to carry out a Strategic Study, for eventual inclusion of the east of Bath link in the second Road Investment Strategy beyond 2020.
Freezing Hill Lane	Bath and North East Somerset Council	<ul style="list-style-type: none"> - It is proposed to undertake a feasibility study to assess options for access improvements from the A420 to Lansdown Park and Ride. - The Freezing Hill / A420 junction is located on the boundary of Bath & North East Somerset and South Gloucestershire Council. The junction forms the core access to the Lansdown P&R site serving Bath city centre from the A46 corridor linking to J18 of the M4. - The T junction is used to access the Lansdown P&R, vehicles travelling from the P&R give way to traffic on the A420, this can cause long delays to P&R users. If P&R use is to continue to grow, improvements to the junction are required. - The feasibility study will enable outline designs, modelling and consultation to be undertaken, prior to any decision on the preferred option.
Temple Meads Masterplan	Bristol City Council	<ul style="list-style-type: none"> - The study will consider a range of major improvements at this key regional hub, including more platforms, better access to the northern entrance, and access improvements for passengers and cyclists. - This element will enable the development of a station masterplan, essential to the delivery of station improvements. - The study will be expected to produce a scheme which is deliverable, affordable and operationally efficient whilst also meeting the high expectations of the city, and wider region, in terms of delivering a new mixed-use quarter (Temple Quarter) and a gateway to the West of England region.
Wraxall Road roundabout improvements	South Gloucestershire Council	<ul style="list-style-type: none"> - The key objective of this investment is to reduce congestion at A4174 Wraxall Road roundabout. - Congestion around the Wraxall Road roundabout has intensified with the emergence of the Lyde Green housing development and the continued growth of the Bristol and Bath Science Park as an employment hub. will provide traffic signal mitigations to enable traffic flow along the A4174 Bristol Ring Road.

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|--|--|--|
| | | <ul style="list-style-type: none">- This feasibility study will identify the benefits available through remodelling the junction and its approaches.- This scheme will facilitate traffic flows along a key strategic route, especially during peak hours connecting some of the region's newest housing developments, the emerging flagship employment space at the Science Park and access to the Bristol North Fringe. Longer-term it enhances the strategic connection to the M4. |
|--|--|--|

Appendix B – Schemes for Business Case Development

Scheme description	Lead Organisation	Detail
Bath and Somer Valley Enterprise Zone	Bath and North East Somerset Council	<ul style="list-style-type: none"> - This study will look at improving the route from the Old Mills employment site on the A362 to the A37, to include pedestrian and cycling improvements. The site has the potential to create 1,700 to 2,000 new jobs but the current route from the A37 to the site requires upgrading to accommodate the increase in travel demand. - The site forms part of the Joint Spatial Plan and supports one of its key aims; reducing the need to travel to Bath and Bristol for employment. - The scheme will include: <ul style="list-style-type: none"> - Improvement to the existing A37/ A362 junction to create additional capacity; - Localised road widening to remove pinch points which create delays and queues; - Pedestrian and cycling improvements to provide sustainable routes to the communities to the east and west along the A362.
Cribbs / Patchway New Neighbourhood Cycling Package	South Gloucestershire Council	<ul style="list-style-type: none"> - The cycling package is part of a wider sustainable transport package for the Filton Enterprise Area and Cribbs/Patchway New Neighbourhood, which seeks to connect existing and new railway stations with the new housing and employment developments. This is set to provide an additional 5,000 new homes redeveloping the Filton Airfield site. The ambition is for it to become an exemplar development for integrated public transport, walking, cycling and innovative use of public open space. - In addition to creating jobs during construction, the anticipated surge in cycle journeys facilitated by this scheme will support a further boost to local employment through sale of cycle equipment, services and accessories. - The opportunity to provide an upfront package of walking and cycling routes to a new development on such a scale also provides a real opportunity to address the region's objectives for enhanced air quality, creating an integrated community with access to open and safe public space and a targeted reduction in car dependence.
Lockleaze	Bristol City Council	<ul style="list-style-type: none"> - Bristol City Council has identified land for 800 new homes and a new school at Lockleaze. This study will look at what transport infrastructure is needed for this development, including bus lanes, cycle routes, and junction improvements.

		<ul style="list-style-type: none"> - This investment would not only create jobs during the scheme itself but also unlock employment opportunities in construction and education as a result. The new homes created would be well located for both Bristol northern fringe and central employment opportunities.
Great Stoke roundabout	South Gloucestershire Council	<ul style="list-style-type: none"> - This scheme will redevelop the Great Stoke roundabout to reduce congestion, vehicle emissions and increase reliability of journeys to strategic housing and employment sites at Harry Stoke and Cribbs/Patchway. - Traffic modelling indicates that it will operate significantly over-capacity in both peak periods by 2036, with particular problems on the Winterbourne Road approaches. Given its location, this junction is therefore expected to considerably restrict traffic movements from a key transport interchange at Bristol Parkway and the access to the economic centre of South Gloucestershire within the Bristol North Fringe. - Any scheme would improve pedestrian and cyclist crossing facilities and complement the Cribbs/Patchway New Neighbourhood Cycling Package. As such this intervention will supports forecast job-creation in the Filton Enterprise Area.
Hicks Gate Roundabout	Bath and North East Somerset Council	<ul style="list-style-type: none"> - The Joint Transport Study recommends a package of major investment on the A4 corridor between Bath and Bristol. The A4 / A4174 Hicks Gate Roundabout is a key junction on the A4 between Bristol and Bath and is located at the western end of the Keynsham Bypass. - This initiative would consider improvements to reduce peak time delays, including development of a new link between the A4 Keynsham Bypass and the A4174 to the north east to remove traffic from the roundabout. Any scheme would take into account and compliment the future A4 to A37 link road and potential relocation of the Hicks Gate Park and Ride. - The roundabout is a known constraint to future growth that will impact on the strategic developments sites of Hicks Gate and Keynsham North. Improvements to the key roundabout would open up network capacity in this key area where the three Council boundaries meet.
Hengrove	Bristol City Council	<ul style="list-style-type: none"> - Bristol City Council is in the process of securing outline planning consent for around 1500 new homes, a large park, onsite highways and access. This initiative would look at the improvements needed to support the development of new homes here, including improvements to William Jessop Way, utilities infrastructure and new access and junctions from Hengrove Way and Bamfield.

		<ul style="list-style-type: none">- Providing the physical and social infrastructure in a planned and co-ordinated way in advance of development will accelerate the delivery of high quality housing, stimulate a market shift and enable additional affordable housing to be delivered (minimum 30% affordable) to meet local housing need and create a buoyant local housing market.
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Appendix C – Summary of Requested Funding

Initiative Short Name	Type	17/18	18/19	19/20	Total Requested
Orbital Route	Feasibility	£50k	£200k	£0k	£250k
Mass Transit and Strategic Connections		£125k	£225k	£0k	£350k
East of Bath Link		£50k	£100k	£100k	£250k
Freezing Hill Lane		£75k	£25k	£0k	£100k
Temple Meads Masterplan		£0.3m	£1.7m	£0k	£2m
Wraxall Road		£75k	£125k	£0k	£200k
Subtotal		£0.675 m	£2.375m	£0.1m	£3.15m
Somer Valley EZ	Business Case Development Funding	£160k	£120k	£0k	£280k
CPNN Cycle Links		£50k	£150k	£0k	£200k
Lockleaze		£30k	£475k	£0k	£505k
Great Stoke Roundabout		£100k	£250k	£200k	£550k
Hicks Gate		£10k	£220k	£230k	£460k
Hengrove		£400k	£400k	£0k	£800k
Real Time Information	Full Business Case	£600k			£600k
Subtotal		£1.35m	£1.615m	£0.43m	£3.395m
TOTAL		£2.025m	£3.99m	£0.53m	£6.545m

Appendix D - Development and Feasibility Funding Application Forms

SCHEME: Southern Orbital

1. Lead Organisation

Bristol City Council

2. Partner organisations

Bath and North East Somerset Council, North Somerset Council
--

3. Scheme contact details

Name:	Jodi Savickas	
Email:	Jodi.savickas@bristol.gov.uk	
Telephone:	07900825126	

4. Scheme Type – mark with an X

Transport	<input checked="" type="checkbox"/>
Non-Transport Housing Enabling	<input type="checkbox"/>
Business Support	<input type="checkbox"/>
Skills	<input type="checkbox"/>
Other (please specify)	

5. Is this investment linked to any others within the early investment or wider Investment Fund programme? If so please set out the relationship and linkages.

Details: The section of the Southern Orbital from the A4 to the A37 is part of a feasibility study that is currently out to tender to complete an options assessment report for a larger SE Bristol package of mitigation works for the delivery of Strategic Development Locations as outlined in the Joint Spatial Plan at Whitchurch, Brislington (Hicks Gate) and North Keynsham. Besides the A4-A37 link as part of the Southern Orbital to which this form refers, the other elements of the SE Bristol package consist of:

1. A4 Metrobus (Bristol to Keynsham) and Callington Road Link, including gating options of

the A4;

2. Orbital Metrobus serving the ring road and new link road and connecting to a ring of parking and ride sites around the city;
3. A4 Hicks Gate Park & Ride including relocating to further to the east to unlock development land and expanding the site;
4. A37 Whitchurch Park & Ride to serve new housing developments in Whitchurch as part of the JSP.

It is important to note the key links and dependencies between this proposed A4 – A37 orbital link and the proposed Callington Road link within Bristol. Both routes will provide for orbital movements where existing options are very limited. Currently many orbital movements are made via the A4 in Brislington and West Town Lane (A4174). The impacts of the A4 / A37 link and the Callington Road link are therefore collectively expected to reduce delays on the A4.

The remaining section of the Southern Orbital that connects up to the A38 towards Bristol Airport is at a stage prior to the above, where a feasibility study is required. The outcomes of this feasibility study and the A4-A37 report will determine the geographical extent of the Southern Orbital for further investigation.

6. Total Funding required for this phase of works (£)

	17/18	18/19	19/20	Total
Investment Fund	£50k (initially to investigate the link up to the A38, not including the A4-A37 link, of which the feasibility study is currently out to tender	£200k (for further investigation of the extent of the Southern Orbital once the A4-A37 study and the separate A38 link study have both been completed)	0	£250k
Match Funding - please state source(s)	0	0	0	0

7. Please describe the scheme to be developed (including its objectives and expected impacts) and the proposed activity to be undertaken through this investment.

Details of the scheme to be delivered:

Whitchurch is located on the southern edge of the Bristol urban area. Growth at this Strategic Development Location (SDL) is focused on the A37 radial corridor into Bristol and will have impacts on the road network across south east Bristol. Currently, due to poor road connectivity in the area, orbital movements between these corridors use congested roads through Bristol and rural lanes between Whitchurch and the Hicks Gate area. Additional highway capacity and improved public transport provision will be needed to address underlying congestion issues, provide access to new development and release space for public transport improvements.

To address traffic impacts on these routes, improved road connectivity is required around south east Bristol, with improved links from Whitchurch to Hicks Gate roundabout. Improving orbital connectivity in south Bristol will present the opportunity to reallocate road space for walking, cycling and public transport on the A4 and A37 corridors. The proposed orbital transport corridor will include provision for dedicated MetroBus lanes and a footway / cycleway and link to a new Park and Ride site at Whitchurch.

In addition, a connection will be provided west of the A37 to link to the existing road network and Whitchurch Lane. This will help cater for demand for the orbital movement of traffic and mitigate the impact of increased flows on A37 through Whitchurch village.

The connection to the A38 towards Bristol Airport then completes another section of the outer ring road, providing a connection from the north and east of the sub-region to the south and particularly Bristol Airport, without the need to travel through the congested city centre.

It is also important to note that this project will look to improve existing routes such as the South Bristol Link as well as provide the new routes as set out above.

Details of the activities to be undertaken through this feasibility or development phase: A procurement process will be followed to identify a consultant to carry out the feasibility study of the link to the A38, as the feasibility work for the A4-A37 link is currently out to tender. Once both feasibility studies have been completed further investigation of the extent of the Southern Orbital will be established, moving the study on to generating a full business case.

8. Please set out how the activities will be managed and resourced. If use of consultants or other third parties is proposed please describe how these have been, or will be procured

Details: Consultants will carry out the feasibility study, client managed by 1 officer in Bristol City Council. To date, the procurement of consultants for the A4-A37 link feasibility study is currently being carried out through the West of England's NEPRO system. It is proposed that either the same method is used for the A38 link feasibility study, or framework consultants used. Advice on this will be sought from WECA.

9. What output will be produced and when will this be completed?

	Mark with an X	Date (mmm/yy)
Feasibility Study Report	<input checked="" type="checkbox"/>	A4-A37 link due March 2018, A38 link proposed to fall in line with this.
Option Development Report	<input type="checkbox"/>	
Option Appraisal Report	<input checked="" type="checkbox"/>	A4-A37 link due March 2018, A38 link proposed to fall in line with this.
Outline Business Case	<input checked="" type="checkbox"/>	July 2018
Full Business Case	<input checked="" type="checkbox"/>	November 2018
Other (please state)		

10. When do you plan to start and complete your project and what are the main project milestones? Please include the milestones related to the feasibility or development work to be undertaken through this application **and** the milestones for the subsequent implementation phase through to completion.

Milestone	Date (mmm/yy)
Commission A4-A37 feasibility study	Oct 2017
Write brief for A38 link	Nov 2017
Commission A38 link feasibility study	Dec 2017
Feasibility studies completed	March 2018
Outline Business Case completed	July 2018
Full Business Case completed	November 2018
Funding identified through WECA	Early 2019
Handed over to delivery teams and construction commissioned	Spring 2019
Completion of build (more detailed milestones unknown until feasibility studies completed)	2028-2029

Date approved by WECA Committee:

SCHEME: Mass Transit and Strategic Connections to A38 South Corridor Options

1. Lead Organisation

Bristol City Council

2. Partner organisations

WECA, Bath and North East Somerset Council, South Gloucestershire Council, North Somerset Council

3. Scheme contact details

Name:	Chris Mason	
Email:	Chris.mason@bristol.gov.uk	
Telephone:	0117 35 74388	

4. Scheme Type – mark with an X

Transport	<input checked="" type="checkbox"/>
Non-Transport Housing Enabling	<input type="checkbox"/>
Business Support	<input type="checkbox"/>
Skills	<input type="checkbox"/>
Other (please specify)	

5. Is this investment linked to any others within the early investment or wider Investment Fund programme? If so please set out the relationship and linkages.

Details: West of England Mass Transit is linked to the development of Park & Ride sites. There is a need to consider the capacity for future expansion of new/existing Park & Rides that could be served by a Mass Transit system.

In addition, development of a Mass Transit system may change travel patterns and choices across the region, interacting with other schemes in the vicinity of the Bristol urban area included in the Joint Transport Study. In the longer term, development of a West of England

Mass Transit system will be a transformational project for the region, shaping transport and housing delivery across the region post 2036.

6. Total Funding required for this phase of works (£)

	17/18	18/19	19/20	Total
Investment Fund	£50k for underground pre-feasibility study			£350k
	£75k for mass transit and airport link feasibility study yr 1	£225k for mass transit feasibility study yr 2		
Match Funding - please state source(s)	0	0	0	0

Please describe the scheme to be developed (including its objectives and expected impacts) and the proposed activity to be undertaken through this investment.

Details of the scheme to be delivered:

A West of England Mass Transit scheme would provide a step change in public transport connectivity: unlocking sub-regional growth and making the West of England an even better place to live, work, visit and enjoy. It has the potential to shape the spatial development and economy of the area, driving housing delivery, jobs and productivity. The scheme would dramatically cut travel times in the region and cut congestion, whilst enabling public realm improvements. It would enable more concentrated development that would increase land values and drive productivity growth.

The Joint Transport Study proposes a new mass transit network that will comprise high-capacity, segregated corridors connecting major destinations and integrating with other modes to transport public transport across the Bristol urban area. This includes routes connecting Bristol City Centre to:

- Bristol Airport
- North Bristol and the North Fringe
- East Bristol and the East Fringe
- Hicks Gate/Keynsham

These routes were identified as they connect the major trip origins and destinations in the Bristol urban area. Further work is needed to determine the alignments and technology options that should be considered for these routes. The Joint Transport Study suggests that underground running in some locations may need to be considered due to streetspace constraints on some routes.

Details of the activities to be undertaken through this feasibility or development phase:

An initial pre-feasibility study has been commissioned to improve regional knowledge and understanding of the benefits and challenges of underground mass transit construction and operation. This will enable underground options for mass transit set out in the JTS to be compared with other more established and understood options such as trams and guided buses.

Following completion of the pre-feasibility study, a procurement process will be followed to identify a consultant to carry out a feasibility study of the mass transit options identified in the JTS. This feasibility study will consider potential alignments (including whether the A4 route stops at Hicks Gate or Keynsham), technology options for the network/each of the routes, assessment of benefits and risks, advice building support for the scheme amongst stakeholder groups, and other details to an extent that it can move forward to the next step towards delivery.

A separate multi-modal study is looking at links between the airport and key strategic routes in the WECA area including bus, light rail, heavy rail, and road options. This 'Bristol South West Economic Link' study is currently underway and is being led by North Somerset Council. It is critical that this study is complementary with the southern orbital study and the mass transit studies to ensure we investigate thoroughly access routes to the Airport with the key strategic routes from the North and East, within the WECA geography. Provision has been made within the £300k mass transit funding to ensure all these studies inform each other across multiple modes and transport interchanges.

7. Please set out how the activities will be managed and resourced. If use of consultants or other third parties is proposed please describe how these have been, or will be procured

Details: Consultants will carry out the feasibility study, reporting to a client group comprised of officers from WECA and each of the West of England authorities. One officer from Bristol City Council will act as lead client.

To date, the procurement of the pre-feasibility study was carried out by Bristol City Council. All large consultancies in the region were invited to tender, generating a high level of interest and high quality bids.

Commissioning of the feasibility study could be carried out either via our term consultants, or via another competitive tender process. Advice on this will be sought from WECA.

8. What output will be produced and when will this be completed?

	Mark with an X	Date (mmm/yy)
Feasibility Study Report	<input checked="" type="checkbox"/>	Initial findings to inform JSP EiP studies end March 2018 Final report Autumn/Winter 2018
Option Development Report	<input type="checkbox"/>	
Option Appraisal Report	<input type="checkbox"/>	
Outline Business Case	<input type="checkbox"/>	
Full Business Case	<input type="checkbox"/>	
Other (please state)		

9. When do you plan to start and complete your project and what are the main project milestones? Please include the milestones related to the feasibility or development work to

be undertaken through this application **and** the milestones for the subsequent implementation phase through to completion.

Milestone	Date (mmm/yy)
Completion of West of England Metro pre-feasibility study	End Oct 2017
Commission Mass Transit feasibility study	November 2017
Feasibility study initial findings to inform JSP EiP studies	End March 2018
Feasibility study final report	Autumn/Winter 2018

Date approved by WECA Committee:	
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SCHEME: East of Bath Link

1. Lead Organisation

Bath and North East Somerset Council

2. Partner organisations

Wiltshire Council, Dorset County Council, and Highways England
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3. Scheme contact details

Name:	Gary Peacock	
Email:	gary_peacock@bathnes.gov.uk	
Telephone:	01225 395307	

4. Scheme Type – mark with an X

Transport	X
Non-Transport Housing Enabling	X
Business Support	
Skills	
Other (please specify)	Air quality and built heritage improvement scheme

5. Is this investment linked to any others within the early investment or wider Investment Fund programme? If so please set out the relationship and linkages.

Details: N/A

6. Total Funding required for this phase of works (£)

	17/18	18/19	19/20	Total
Investment Fund	£50,000	£100,000	£100,000	£250,000
Match Funding - please state source(s)	0	0	0	0

7. Please describe the scheme to be developed (including its objectives and expected impacts) and the proposed activity to be undertaken through this investment.

Details of the scheme to be delivered:

Bath & North East Somerset is crossed by two strategic transport corridors of regional, national and European significance. These routes experience considerable congestion and road safety problems, and their increasing unreliability is significantly constraining development and business growth across the region, including plans to grow the port of Poole. The A36 and A46 which pass through Bath are major routes which form part of the strategic road network and as such are operated by Highways England. The route of the two corridors results in Bath contending with an unacceptable level of through traffic. This includes large numbers of HGVs travelling to or from the Channel ports.

The construction of a link road east of the city has been a long-held aspiration of Bath and North East Somerset Council and the need for such a measure has been identified in the Bristol/Bath to South Coast Transport Study (2004) the Greater Bristol Area Strategic Transport Study (2006) and most recently in the Joint Transport Study which includes an estimate of the costs of £100m.

Bath and North East Somerset Council alongside Wiltshire Council, Dorset County Council and Highways England have collaborated to bring forward a case for investment. There is a strong economic case for improved north south links in the south of England as a whole.

Details of the activities to be undertaken through this feasibility or development phase:

Dorset, Wiltshire, and Bath and North East Somerset councils are working together to study the current transport connections between the M4 and the south coast and their impact on our economy.

We are gathering evidence to support a case to improve north-south transport connections in the south west, which could help grow our economy, support local businesses and improve people's quality of life.

The £250k funding will fund the development and promotion of the prospectus for North South Connectivity. This will form part of a compelling case to encourage the Secretary of State to for Transport to mandate Highways England to carry out a Strategic Study, for eventual inclusion of the east of Bath link in the second Road Investment Strategy beyond 2020.

8. Please set out how the activities will be managed and resourced. If use of consultants or other third parties is proposed please describe how these have been, or will be procured

Details:

9. What output will be produced and when will this be completed?

	Mark with an X	Date (mmm/yy)
Feasibility Study Report	<input type="checkbox"/>	
Option Development Report	<input type="checkbox"/>	
Option Appraisal Report	<input type="checkbox"/>	
Outline Business Case	<input type="checkbox"/>	
Full Business Case	<input type="checkbox"/>	
Strategic Study Mandated	X	Early 2018

10. When do you plan to start and complete your project and what are the main project milestones? Please include the milestones related to the feasibility or development work to

be undertaken through this application **and** the milestones for the subsequent implementation phase through to completion.

Milestone	Date (mmm/yy)
Strategic Study Mandated	Early 2018
Draft Road Investment Strategy	Spring 2018/19
Government Approval of Road Investment Strategy	Winter 2018/19*

*Note: The timeline has been assessed in order to accommodate timescales required working with Highways England through the strategic review process.

Date approved by WECA Committee:	
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SCHEME: Freezing Hill / A420 junction

1. Lead Organisation

Bath and North East Somerset Council

2. Partner organisations

South Gloucestershire Council

3. Scheme contact details

Name:	Gary Peacock	
Email:	gary_peacock@bathnes.gov.uk	
Telephone:	01225 395307	

4. Scheme Type – mark with an X

Transport	x
Non-Transport Housing Enabling	
Business Support	
Skills	
Other (please specify)	

5. Is this investment linked to any others within the early investment or wider Investment Fund programme? If so please set out the relationship and linkages.

Details: Joint Transport Study

6. Total Funding required for this phase of works (£)

	17/18	18/19	19/20	Total
Investment Fund	£75,000	£25,000	0	£100,000
Match Funding - please state source(s)	0	0	0	0

7. Please describe the scheme to be developed (including its objectives and expected impacts) and the proposed activity to be undertaken through this investment.

Details of the scheme to be delivered:

The Freezing Hill / A420 junction is located on the boundary of Bath & North East Somerset and South Gloucestershire Council. The junction forms the core access to the Lansdown P&R site serving Bath city centre from the A46 corridor linking to J18 of the M4 Lansdown Park and Ride. The T junction is used to access the Lansdown P&R, vehicles travelling from the P&R give way to traffic on the A420, this can cause long delays.

The Park and Ride expansions form part of the Joint Transport Study and Getting Around Bath Transport Strategy. There are three Park and Ride sites that intercept traffic for Bath, Lansdown Park and Ride serves traffic demand from M4 corridor and Bristol, poor access, constrains its current use and potential for expansion.

It is proposed to undertake a feasibility study to assess options for access improvements from the A420 to Lansdown Park and Ride, the feasibility will cost £100k, dependant of the selected option the improvements are not expected to cost greater the £1.5m.

Details of the activities to be undertaken through this feasibility or development phase:

The first stage would be a feasibility study which will assess two potential routes, Freezing Hill and Bath Road, which would include the A420/Gorse Lane junction. This should enable outline designs, modelling, safety assessments and consultation to be undertaken leading to a decision on the preferred option and full business case.

B&NES would procure the study, working with South Gloucestershire Council who will form part of the project team.

8. Please set out how the activities will be managed and resourced. If use of consultants or other third parties is proposed please describe how these have been, or will be procured

Details: The study will be procured through the Councils framework agreement with Ch2M.

9. What output will be produced and when will this be completed?

	Mark with an X	Date (mmm/yy)
Feasibility Study Report	X	
Option Development Report	<input type="checkbox"/>	
Option Appraisal Report	<input type="checkbox"/>	
Outline Business Case	<input type="checkbox"/>	
Full Business Case	X	June 18
Other (please state)		

10. When do you plan to start and complete your project and what are the main project milestones? Please include the milestones related to the feasibility or development work to be undertaken through this application **and** the milestones for the subsequent implementation phase through to completion.

Milestone	Date (mmm/yy)
Feasibility Commissioned	Nov 17
Preferred Option agreed	Mar 18
Full Business Case	June 18

Date approved by WECA Committee:

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SCHEME: Bristol Temple Meads Masterplan

1. Lead Organisation

Bristol City Council (BCC)

2. Partner organisations

Network Rail

3. Scheme contact details

Name:	Richard Marsh Programme Director – Bristol TQEZ Bristol City Council	
Email:	Richard.marsh@bristol.gov.uk	
Telephone:	07393 007648	

4. Scheme Type – mark with an X

Transport	<input checked="" type="checkbox"/>
Non-Transport Housing Enabling	<input type="checkbox"/>
Business Support	<input type="checkbox"/>
Skills	<input type="checkbox"/>
Other (please specify)	

5. Is this investment linked to any others within the early investment or wider Investment Fund programme? If so please set out the relationship and linkages.

<p>The provision of £2m to support Masterplanning and feasibility work relating to Bristol Temple Meads station is not currently linked or related to any other early investment or Investment Fund projects.</p>

<p>The £2m of funding requested will also leverage circa £1.6m of Network Rail funding, which will also support the work to be undertaken.</p>
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Commissioning and completion of the Masterplanning works in a timely fashion is important to the city and wider West of England region on several levels;

1. To deliver a viable plan for the refurbishment/redevelopment of the station; allowing it to fulfil its nationally significant role, to support local and regional travel and support wider ambitions (specifically around housing) as set out through both the West of England Joint Spatial Plan (JSP) and the Joint Travel Plan (JTS).
2. To help realise the West of England's economic ambitions – investment in the station will be crucial in continuing to support business development in the West of England and within Bristol. This will support the delivery of jobs within the region, the generation of business rates (supporting the growth of the EDF fund) and deliver opportunities for skills and training.
3. To ensure that the full transformational and catalytic impact of the development of the University of Bristol's Enterprise Campus can be realised to the benefit of the Temple Quarter, wider city and wider region – ensuring and facilitating the delivery of direct access from the refurbished station will be of great importance in this regard. The feasibility and masterplan work can help in delivery of this access.
4. To leverage further funding – the investment in Masterplanning work to support investment in Temple Meads will provide BCC with detailed information in order to support future funding bids. This will allow the opportunity to secure and leverage additional public funding at a West of England and National level in order to support the refurbishment of the station. It will also offer scope to attract additional private sector investment within the wider Temple Quarter area.

It is crucial to immediately commence the masterplanning work – which will be facilitated through the £2m to be released. Without the masterplanning work, it is unlikely that other sources of funding will be secured to support the redevelopment or refurbishment of the station.

6. Total Funding required for this phase of works (£)

	17/18	18/19	19/20	Total
Investment Fund	£0.3m*	£1.7m*		2m
Match Funding - please state source(s)		£1.6m*		1.6m

*phasing of funding to be confirmed upon finalisation of feasibility brief.

7. Please describe the scheme to be developed (including its objectives and expected impacts) and the proposed activity to be undertaken through this investment.

Scheme to be developed:

The masterplanning and feasibility work will focus upon Bristol Temple Meads station. It will consider how the refurbishment and redevelopment of the station could be undertaken in order to deliver the operational and capacity requirements of Network Rail whilst also unlocking and enabling key development sites and opportunities in the wider area around the station - to the benefit of the city and its stakeholders. The study will be expected to produce a scheme which is deliverable, affordable and operationally efficient whilst also meeting the high expectations of the city, and wider region, in terms of delivering a new mixed-use quarter (Temple Quarter) and a gateway to the west of England region.

Details of the activities to be undertaken through this feasibility or development phase: at your end

The detailed brief for the masterplanning work is currently under development, but work is anticipated to include:

- A re-assessment and re-stating of the objectives of the refurbishment/redevelopment of Temple Meads, its relationship to the Temple Quarter, Bristol city and the wider region;
- A review of work undertaken to date in relation to options for the refurbishment/redevelopment of the station and development of surrounding sites;
- Revisions to previous work and, where required, new work in order to support the masterplanning and ensure the maximisation of outputs (financial, economic, environmental and social) for all parties. A key area of focus will be to deliver cost effective and efficient options for the station redevelopment.
- Identification of the key costs and barriers associated with delivery of a refurbishment/redevelopment scheme (including enhancements within the immediate vicinity of the station);
- Consideration of delivery options for the refurbishment of the station and development of surrounding areas. These must be capable of meeting the objectives of the parties. Indicative delivery and phasing plans are also expected to be developed. And;
- Delivery of a set of proposals for review and agreement between the parties.
- Further operational requirement work to be undertaken will be identified in collaboration with Network Rail.

8. Please set out how the activities will be managed and resourced. If use of consultants or other third parties is proposed please describe how these have been, or will be procured

Details:

Release of the £2m of funds will allow BCC, together with Network Rail, to procure experienced consultants to deliver a comprehensive, deliverable and cost effective masterplan/feasibility study for Bristol Temple Meads station.

The consultants will be procured through a framework agreement in line with public procurement rules.

9. What output will be produced and when will this be completed?

	Mark with an X	Date (mmm/yy)
Feasibility Study Report	<input checked="" type="checkbox"/>	Mar 19
Option Development Report	<input type="checkbox"/>	
Option Appraisal Report	<input type="checkbox"/>	
Outline Business Case	<input type="checkbox"/>	
Full Business Case	<input type="checkbox"/>	
Other (please state)		

10. When do you plan to start and complete your project and what are the main project milestones? Please include the milestones related to the feasibility or development work to be undertaken through this application **and** the milestones for the subsequent implementation phase through to completion.

Milestone	Date (mmm/yy)
WECA approval of grant	Oct 17
Appointment of Consultants	Jan 18
Completion of feasibility study	Mar 19

Date approved by WECA Committee:

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SCHEME: A37 to A362 Improvements – Somer Valley Enterprise Zone

1. Lead Organisation

Bath and North East Somerset Council

2. Partner organisations

None

3. Scheme contact details

Name:	Gary Peacock	
Email:	gary_peacock@bathnes.gov.uk	
Telephone:	01225 395307	

4. Scheme Type – mark with an X

Transport	X
Non-Transport Housing Enabling	
Business Support	X
Skills	
Other (please specify)	

5. Is this investment linked to any others within the early investment or wider Investment Fund programme? If so please set out the relationship and linkages.

Details: Joint Transport Study

6. Total Funding required for this phase of works (£)

	16/17	17/18	18/19	19/20	Total
Investment Fund	0	£160,000	£120,000	0	£280,000
Match Funding - please state source(s)	0	0	0	0	0

7. Please describe the scheme to be developed (including its objectives and expected impacts) and the proposed activity to be undertaken through this investment.

Details of the scheme to be delivered:

- Bath and North East Somerset Council is supporting the development of the Bath & Somer Valley Enterprise Zone which includes the 13.5ha allocated employment site at Old Mills located on the A362. B&NES see this as a key employment site for the Somer Valley and would want to progress this as a priority due to the potential to create 1,700 to 2,000 new jobs. The Bath & Somer Valley EZ does form part of the Joint Spatial Plan and as such contributes to and supports the delivery of 105k new homes.

- A key element of the plan is to develop the Old Mills Enterprise Zone in the Somer Valley to reduce the need to travel to Bath and Bristol for employment. There has been significant additional housing provided in the Somer Valley area over the last 10-20 years with further housing development planned for and committed through the Core Strategy which needs to be balanced by additional employment development. The Core Strategy makes provision for around 2,400 additional homes in the Somer Valley between 2011 & 2029. The current route from the A37 to the site requires upgrading to accommodate the increase in travel demand from the Enterprise Zone.

- The upgrading of the route will ensure good connectivity to the A37 and surrounding areas and will enable the Zone to be delivered without further offsite improvements. This will remove a major hurdle to the delivery of the Old Mills site, is a pre-requisite for a successful Enterprise Zone and will allow its development to be accelerated.

The scheme will include:

- Improvement to the existing A37/ A362 signalised junction to create additional capacity.
- Localised road widening to remove pinch points which create delays and queues
- Pedestrian and cycling improvements to provide the sustainable routes to the communities to the east and west along the A362.

The estimated cost of the scheme is £2.8m.

Details of the activities to be undertaken through this feasibility or development phase:

Initially an outline business case will be developed that will include an updated preliminary design, environmental assessments, economic benefits including GVA, and traffic modelling / forecasts. Following any statutory approvals, a Full Business Case will be submitted.

8. Please set out how the activities will be managed and resourced. If use of consultants or other third parties is proposed please describe how these have been, or will be procured

Details: The scheme will be developed by the Council Design Team.

9. What output will be produced and when will this be completed?

	Mark with an X	Date (mmm/yy)
Feasibility Study Report	<input type="checkbox"/>	
Option Development Report	<input type="checkbox"/>	complete
Option Appraisal Report	<input type="checkbox"/>	Jan 2018
Outline Business Case	X	Nov 2018
Full Business Case	X	Sept 2019
Other (please state)		

10. When do you plan to start and complete your project and what are the main project milestones? Please include the milestones related to the feasibility or development work to be undertaken through this application **and** the milestones for the subsequent implementation phase through to completion.

Milestone	Date (mmm/yy)
Option appraisal	Jan 2018
Outline business case	Nov 2018
Full business case	Sept 2019
Start construction	Jan 2020
Construction complete	Nov 2020

Date approved by WECA Committee:

SCHEME: Cribbs/Patchway Cycle Links

1. Lead Organisation

South Gloucestershire Council

2. Partner organisations

In delivering this package of schemes, South Gloucestershire Council will work in partnership with Bristol City Council, and the developers of sites within the Cribbs Patchway New Neighbourhood.
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3. Scheme contact details

Name:	Richard Gillingham Major Schemes SRO	
Email:	Richard.Gillingham@southglos.gov.uk	
Telephone:	01454 864448	

4. Scheme Type – mark with an X

Transport	<input checked="" type="checkbox"/>
Non-Transport Housing Enabling	<input type="checkbox"/>
Business Support	<input type="checkbox"/>
Skills	<input type="checkbox"/>
Other (please specify)	

5. Is this investment linked to any others within the early investment or wider Investment Fund programme? If so please set out the relationship and linkages.

Details: There are no links to other early investment schemes, but this scheme links to the strategic cycle routes proposed within the Joint Transport Study, and to the Access to Bristol North scheme within the 2017-18 LGF (Local Growth Fund) Sustainable Transport package.

6. Total Funding required for this phase of works (£)

	17/18	18/19	19/20	Total
Investment Fund	50,000	150,000	0	200,000
Match Funding - please state source(s)	0	0	0	0

7. Please describe the scheme to be developed (including its objectives and expected impacts) and the proposed activity to be undertaken through this investment.

Details of the scheme to be delivered:

The Cribbs/Patchway New Neighbourhood (CPNN) cycling package of investment is a key component of a comprehensive sustainable transport package for the Filton Enterprise Area and CPNN. This will connect existing and new rail stations with the expansive new housing and employment developments in this area. It supports the ambition for CPNN to be an exemplar development for integrated public transport, walking, cycling and innovative use of public open space.

The CPNN is set to provide an additional 5,000 new homes redeveloping the Filton Airfield site and this development is entirely dependent on the full implementation of the sustainable transport package, of which this is part. There is an opportunity through early investment funding to accelerate the delivery of the sustainable transport package and in doing so we can both expedite the delivery of housing and explore the opportunities for a potential increase in densities alongside enhanced public realm.

This stage of the scheme will develop an Outline Business Case and subsequently a Full Business Case for the full scheme. It is anticipated that a £2 million package of cycle schemes will be delivered, focussing on enhancing connectivity to jobs and housing, in order to provide GVA uplift appropriate to the scale and nature of the schemes.

Schemes within the package will complement both the Council's adopted cycle strategy and the onsite cycle corridors identified within developer masterplans for the CPNN and will include improvements to existing cycle routes around the development site, provision of new cycle routes, and improvements to crossing points and junctions.

The key objective of this scheme is to reduce dependency on solo car use through the provision of a package of strategically important cycle improvements. Expected impacts of the scheme, when compared to a do-nothing alternative, include:

- An improvement in Air Quality through reduced vehicular emissions
- Reduced levels of traffic congestion
- Improved access to employment and essential services
- Significantly improved facilities for walking and cycling

Details of the activities to be undertaken through this feasibility or development phase:

- Phase 1:
 - Surveys
 - Outline design and costing
 - Internal scheme scrutiny
 - Options appraisal
 - Production of Outline business case
 - Stage gate (internal)
- Phase 2:
 - Detailed design
 - Planning applications and other consents (if required)
 - Public consultation

- Advert/Reporting objections (if required)
- Production of full business case
- Stage gate

8. Please set out how the activities will be managed and resourced. If use of consultants or other third parties is proposed please describe how these have been, or will be procured

Details:

In-house project management, design and implementation with selective use of extant supply chain consultants/contractors as required.

9. What output will be produced and when will this be completed?

	Mark with an X	Date (mmm/yy)
Feasibility Study Report	<input type="checkbox"/>	
Option Development Report	<input type="checkbox"/>	
Option Appraisal Report	<input type="checkbox"/>	
Outline Business Case	<input checked="" type="checkbox"/>	June 2018
Full Business Case	<input checked="" type="checkbox"/>	March 2019
Other (please state)		

10. When do you plan to start and complete your project and what are the main project milestones? Please include the milestones related to the feasibility or development work to

be undertaken through this application **and** the milestones for the subsequent implementation phase through to completion.

Milestone	Date (mmm/yy)
Commence phase 1 (mobilisation, outline design, costings and option appraisal)	Nov 2017
Outline Business Case produced	June 2018
Commence phase 2 (detailed design, consents and business case development)	July 2018
Consultation	Jan 2019
Full Business case submission	March 2019
Commence phase 3 (construction)*	Summer 2019
Project completion*	Spring 2021

* Subject to the need for Traffic Regulation Orders and the ability to occupy the network, depending on other programmed works, both of which will be considered as part of the development phases.

Date approved by WECA Committee:	
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SCHEME: Wraxall Road Roundabout Improvements and Signalisation – Stage 1 Feasibility Study and Options Appraisal.

1. Lead Organisation

South Gloucestershire Council

2. Partner organisations

None

3. Scheme contact details

Name:	Jon Munslow	
Email:	jonathan.munslow@southglosd.gov.uk	
Telephone:	01454863910	

4. Scheme Type – mark with an X

Transport	<input checked="" type="checkbox"/>
Non-Transport Housing Enabling	<input type="checkbox"/>
Business Support	<input type="checkbox"/>
Skills	<input type="checkbox"/>
Other (please specify)	

5. Is this investment linked to any others within the early investment or wider Investment Fund programme? If so please set out the relationship and linkages.

Details: Joint Transport Study

6. Total Funding required for this phase of works (£)

	17/18	18/19	19/20	Total
Investment Fund	75,000	£125,000	0	£200,000
Match Funding - please state source(s)	0	0	0	0

7. Please describe the scheme to be developed (including its objectives and expected impacts) and the proposed activity to be undertaken through this investment.

Details of the scheme to be delivered:

Feasibility Study and Options Report detailing the results of a study and traffic modelling of improvements to the A4174 Wraxall Road Roundabout and the approaches of Wraxall Road and Tower Lane. The study will identify the benefits available through remodelling the junction and its approaches. The feasibility study report will provide costed estimates of potential interventions. A recommended option and an outline plan for delivery of the recommended scheme.

The key objective is to reduce congestion at A4174 Wraxall Road roundabout.

Expected impacts (compared to the 'do nothing') include:

- Reduced levels of traffic congestion;
- Improved journey time reliability;
- Reduced vehicular emissions;

Reducing congestion on the A4174 is expected to provide economic benefits, supporting the economy on in the East Fringe of Bristol including Emersons Green Enterprise Area.

Details of the activities to be undertaken through this feasibility/development phase:

Traffic study, Traffic modelling, Intervention options development, Options appraisal, Cost benefit analysis, recommended next action and outline design.

8. Please set out how the activities will be managed and resourced. If use of consultants or other third parties is proposed please describe how these have been, or will be procured

Details:

In-house project management, design and implementation with selective use of extant supply chain consultants/contractors as required.

9. What output will be produced and when will this be completed?

	Mark with an X	Date (mmm/yy)
Feasibility Study Report	<input checked="" type="checkbox"/>	July 2018
Option Development Report	<input type="checkbox"/>	
Option Appraisal Report	<input type="checkbox"/>	
Outline Business Case	<input type="checkbox"/>	
Full Business Case	<input type="checkbox"/>	
Other (please state)		

10. When do you plan to start and complete your project and what are the main project milestones? Please include the milestones related to the feasibility or development work to be undertaken through this application **and** the milestones for the subsequent implementation phase through to completion.

Milestone – Stage 1	Date (mmm/yy)
Development - Commencement and project set up.	Nov 17
Development - Traffic Study	Dec 17
Development - Traffic Modelling results	Feb 18
Development - Options development	April 18
Development - Benefits Analysis	May 18
Development – Feasibility study final Report	July 18

Date approved by WECA Committee:

SCHEME: Unlocking Lockleaze Development

1. Lead Organisation

Bristol City Council

2. Partner organisations

No external partner organisations

3. Scheme contact details

Name:	Paul Owens	Melanie Bufton
Email:	paul.owens@bristol.gov.uk	melanie.bufton@bristol.gov.uk
Telephone:	07810506981	0117-9036815

4. Scheme Type – mark with an X

Transport	<input checked="" type="checkbox"/>
Non-Transport Housing Enabling	<input checked="" type="checkbox"/>
Business Support	<input type="checkbox"/>
Skills	<input type="checkbox"/>
Other (please specify)	

5. Is this investment linked to any others within the early investment or wider Investment Fund programme? If so please set out the relationship and linkages.

Details:

Unlocks delivery of approximately 800 new homes in Lockleaze which is part of Bristol City Council's Lockleaze Housing Delivery Programme.

The investment will also support the Lockleaze Estate Regeneration Programme supported by DCLG.

6. Total Funding required for this phase of works (£)

	17/18	18/19	19/20	Total
Investment Fund	£30,000	£475,000	0	£505,000
Match Funding - please state source(s)	0	0	0	0

7. Please describe the scheme to be developed (including its objectives and expected impacts) and the proposed activity to be undertaken through this investment.

Details of the scheme to be delivered:

Bristol City Council owns some 16ha of land (development plots held in both the Housing Revenue Account and General Account) within the Lockleaze Estate suitable for the development of approximately 800 new homes and to support local regeneration.

Due to constrained vehicular access to the Lockleaze estate, transport modelling suggests that without additional sustainable transport infrastructure this potential level of development is unlikely to comply with Planning Policy requirements and unlikely to receive necessary Planning Consents. Potential additional congestion and air quality deterioration can however be mitigated against by provision of new infrastructure which will unlock this development.

Provision of new infrastructure will help achieve the Travel Plan mode shares and realise the sustainable development that local and national policy requires all new development to deliver, in the interests of minimising car reliance in favour of forms of movement that impact positively on the health of the local community, including walking, cycling and public transport.

Such investment would reduce the reliance on the private car (and subsequently car parking) which could help deliver higher density development and therefore maximise the number of dwellings that are achievable on any given site. Existing residents of Lockleaze and the wider area can be expected to benefit from transport infrastructure improvements. Specific sustainable transport investments to be made on Muller Road and within the Stoke Park Estate, subject to consultation, are expected to be:

The Muller Road works:

- Provide pedestrian Dropped Kerbs
- Upgrade/ relocate existing bus stops to include low-floor platforms to meet current accessibility standards.
- Replace bus shelters to improve waiting facilities
- Provide Left Turn filter signal at the Gloucester Road junction
- Introduce sections of northbound bus lane - week day peak hour only
- Introduce sections of southbound bus lane - week day peak hour only
- Improve the surface of access lanes to enable residents to use off street parking during week day peak hour when the bus lane is in operation
- Remove Downend Road signal junction control and replace with a Toucan Crossing. Consideration to be given to closing the eastern arm to remove the through movement from the western arm which would also prevent HGVs from accessing the narrow double bend
- Signalise the Ralph Road junction
- Close Springfield Avenue junction to through traffic

An indicative Muller Road implementation scheme is shown at Appendix B.

The Stoke Park Estate work will:

- Provide an all-weather shared use accessible path through Stoke Park Estate from Romney Avenue to Broomhill/Stapleton

Details of the activities to be undertaken through this feasibility or development phase:

Activities to be undertaken at this phase include: design, surveys, statutory Planning Consents, TRO (Traffic Regulation Orders), consultation and information required for full business case development.

9. Please set out how the activities will be managed and resourced. If use of consultants or other third parties is proposed please describe how these have been, or will be procured

Details: Transport Delivery Board – responsible for providing overall direction and management of the infrastructure project, and making key decisions such as the commitment of resources. Transport Programme Team – the 'PMO' for the Transport Service, this team supports the delivery of the projects that form the Transport Capital Programme. Project manager – responsible for day-to-day management of the project and work tasks and will delegate responsibility for the delivery of these to the Project Team, specialists or consultants as appropriate. Project Team – will deliver work packages as identified by the Project Manager through utilisation of internal resources, consultants and technical specialists as appropriate e.g. Framework contract. The project team will comprise officers from Traffic Signals, Network Management, Engineering Design, Procurement, Legal Services, and others as appropriate.

The sustainable transport infrastructure implementation required to unlock development will be delivered by the Transport Delivery Board as noted above. The implementation of housing delivery will be managed by the Council's Housing Delivery Team under the supervision of the Housing Delivery Board. Two sites, accommodating 347 new homes will be transferred to a Local Housing Company to be delivered through a Local Housing Company. Bristol City Council has benefitted from Estate Regeneration to provide internal delivery capacity.

10. What output will be produced and when will this be completed?

	Mark with an X	Date (mmm/yy)
Feasibility Study Report	<input checked="" type="checkbox"/>	2/2018
Option Development Report	<input checked="" type="checkbox"/>	4/2018
Option Appraisal Report	<input checked="" type="checkbox"/>	6/2018
Outline Business Case	<input checked="" type="checkbox"/>	10/2018
Full Business Case	<input checked="" type="checkbox"/>	5/2019
Other (please state)		

11. When do you plan to start and complete your project and what are the main project milestones? Please include the milestones related to the feasibility or development work to be undertaken through this application **and** the milestones for the subsequent implementation phase through to completion.

Milestone	Date (mmm/yy)
Feasibility commencement	11/2017
Preliminary design commencement	4/2018
Public consultation commences	8/2018
All-weather accessible path (incl: new cycle paths) completed	7/2020
Muller Road corridor public transport, cycleway and pedestrian capacity enhancements implemented	3/2021

Date approved by WECA Committee:	
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SCHEME: Great Stoke Roundabout Capacity Improvements

1. Lead Organisation

South Gloucestershire Council

2. Partner organisations

None

3. Scheme contact details

Name:	Richard Gillingham	
Email:	Richard.gillingham@southglos.gov.uk	
Telephone:	01454 864448	

4. Scheme Type – mark with an X

Transport	<input checked="" type="checkbox"/>
Non-Transport Housing Enabling	<input type="checkbox"/>
Business Support	<input type="checkbox"/>
Skills	<input type="checkbox"/>
Other (please specify)	

5. Is this investment linked to any others within the early investment or wider Investment Fund programme? If so please set out the relationship and linkages.

Details: This scheme will complement the CPNN (Cribbs/Patchway New Neighbourhood) cycling package also identified within this Early Investment Programme, through incorporating enhanced pedestrian and cyclist crossing facilities where possible.

6. Total Funding required for this phase of works (£)

	17/18	18/19	19/20	Total
Investment Fund	100,000	250,000	200,000	550,000
Match Funding - please state source(s)	-	-	-	-

7. Please describe the scheme to be developed (including its objectives and expected impacts) and the proposed activity to be undertaken through this investment.

Details of the scheme to be delivered:

This scheme will increase capacity at the Great Stoke roundabout. Traffic modelling indicates that it will operate significantly over-capacity in both peak periods by 2036, with particular problems on the Winterbourne Road approaches. Given its location, this junction is therefore expected to considerably restrict traffic movements from a key transport interchange at Bristol Parkway and the access to the economic centre of South Gloucestershire within the Bristol North Fringe.

Harry Stoke and the Cribbs/Patchway New Neighbourhood are two critical strategic housing sites for South Gloucestershire. Between them they will release circa 8,000 homes, such that effective strategic transport links are a priority for sustainable travel. The proposed scheme is complementary to other roundabout capacity schemes successfully delivered in the North Fringe, such as Aztec West roundabout, as part of a package of investments to support the Filton Enterprise Area and the sustainable growth of housing.

The scheme will re-develop the problematic roundabout to improve general traffic flow through the junction. This is expected to have a significant impact, reducing congestion and connecting to a comprehensive sustainable transport package for the Filton Enterprise Area and Cribbs/Patchway New Neighbourhood (CPNN).

The resultant reconfigured roundabout is likely to be a three-lane circulatory system, including a segregated left turn slip from Winterbourne Road east and three-lane entry from Winterbourne Road west. It is expected to cost approximately £4.7m, including development & construction costs. This scheme will include enhanced pedestrian and cyclist crossing facilities. It is anticipated that the improvements can be accommodated on highway land.

This is the next stage of a broader package of transport interventions to support traffic movements in and around the Filton Enterprise Area. The case was made in 'Unlocking Our Potential: The Economic Benefits of Transport Investment in the West of England' (a study to assess the potential of transport schemes to unlock the GVA and job potential of priority growth locations in the West of England) that without transport interventions only 1,200 of the forecasted 12,000 jobs in the Filton Enterprise Area could be delivered.

The increased capacity of critical pinch points is essential to the development of the region's infrastructure, to meet the housing and economic growth ambitions. This increased capacity scheme will serve a critical access route for both the Filton Enterprise Area and the Cribbs/Patchway New Neighbourhood, which between them represent both the predominant economic hub for South Gloucestershire and the largest strategic development site in the Core Strategy.

The key objective is to mitigate forecast traffic congestion at Great Stoke Roundabout.

Expected impacts (compared to the 'do nothing' option) include:

- Reduced levels of traffic congestion;
- Improved journey time reliability;
- Reduced vehicular emissions;
- Improvements for pedestrians and cyclists

Details of the activities to be undertaken through this feasibility or development phase:

- Phase 1
 - Refinement and update of traffic modelling;
 - Topographic, GI and Utility surveys;
 - preliminary design;

- internal consultation (scrutiny)
- preparation of Outline Business Case:
- internal stage gate:
- Phase 2
 - public consultation;
 - detailed design;
 - environmental assessment;
 - planning application and other consents (if required);
 - Full Business Case.
 - stage gate

8. Please set out how the activities will be managed and resourced. If use of consultants or other third parties is proposed please describe how these have been, or will be procured

Details:

In-house project management, design and implementation with selective use of extant supply chain consultants/contractors as required.

9. What output will be produced and when will this be completed?

	Mark with an X	Date (mmm/yy)
Feasibility Study Report	<input type="checkbox"/>	
Option Development Report	<input type="checkbox"/>	
Option Appraisal Report	<input type="checkbox"/>	
Outline Business Case	<input checked="" type="checkbox"/>	June 2018
Full Business Case	<input checked="" type="checkbox"/>	Spring 2020
Other (please state)		

10. When do you plan to start and complete your project and what are the main project milestones? Please include the milestones related to the feasibility or development work to

be undertaken through this application **and** the milestones for the subsequent implementation phase through to completion.

Milestone	Date (mmm/yy)
Start phase 1 (surveys, prelim design)	Nov 2017
Outline Business Case produced	June 2018
Start phase 2 (consultation, detailed design & consents)	Aug 2018
Full Business Case submission	Feb 2020
Start of phase 3 (construction)*	Spring 2020*
Project completion**	Winter 2021/22**

* Subject to the ability to occupy the network, depending on other programmed works (e.g. CPME, Gipsy Patch Lane bridge), which will be considered as part of the development phases.

** Subject to the construction start date, detailed design and construction methodology, which will be determined through the development phases and set out in the full business case. Note: the timeline above has been assessed as challenging but deliverable. Therefore, it is not able to bring this forward to commit to delivering any earlier than currently stated.

Date approved by WECA Committee:	
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SCHEME: Hicks Gate Roundabout

1. Lead Organisation

Bath and North East Somerset Council

2. Partner organisations

South Gloucestershire Council and Bristol City Council
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3. Scheme contact details

Name:	Gary Peacock	
Email:	gary_peacock@bathnes.gov.uk	
Telephone:	01225 395307	

4. Scheme Type – mark with an X

Transport	X
Non-Transport Housing Enabling	
Business Support	
Skills	
Other (please specify)	

5. Is this investment linked to any others within the early investment or wider Investment Fund programme? If so please set out the relationship and linkages.

Details: Joint Transport Study

6. Total Funding required for this phase of works (£)

	17/18	18/19	19/20	Total
Investment Fund	£10,000	£220,000	£230,000	£460,000
Match Funding - please state source(s)	0	0	0	0

7. Please describe the scheme to be developed (including its objectives and expected impacts) and the proposed activity to be undertaken through this investment.

Details of the scheme to be delivered:

- The JTS recommends a multi-modal package of major investment on the A4 corridor between Bath and Bristol. The A4 / A4174 Hicks Gate Roundabout is a key junction on the A4 between Bristol and Bath and is located at the western end of the Keynsham Bypass. This is also the terminal junction at the southern end of the A4174 Ring Road route through East Bristol and the North Fringe. In the peak time period 'exit blocking' results in delay to all arms. Improvements to the roundabout would involve the provision of a link from the A4174 to the A4 removing traffic from the roundabout. Any scheme would take account of and accommodate the consultation on an M4 Junction 18A, the A4 to A37 link road, MetroBus and the relocation of the Brislington Park and Ride.

- The roundabout is a known constraint to future growth that will impact on the strategic development sites of Hicks Gate and Keynsham North. Improvements to the key roundabout ahead of the longer-term Joint Spatial Plan infrastructure mitigations would provide improvements to network capacity, bringing forward the potential for housing on the non-Strategic Development sites. Additionally, it would provide significant improvements to a key part of the network where the three Council boundaries meet.

The scheme involves the provision of a new link between the A4 Keynsham Bypass and the A4174 to the north east of the roundabout. The link will remove right turning traffic from the westbound A4 to A4174 and from the left filter from the A4174 to the eastbound A4. The proposed arrangement would require a new traffic signal junction on the bypass and A4174 in the vicinity of the roundabout. The estimated cost is £4.7m.

Details of the activities to be undertaken through this feasibility or development phase:

Initially an outline business case will be developed that will include: an updated preliminary design; environmental assessments; and economic benefits, including GVA and traffic modelling / forecasts. Following statutory approvals a Full Business Case will be submitted.

8. Please set out how the activities will be managed and resourced. If use of consultants or other third parties is proposed please describe how these have been, or will be procured

Details: Consultant support will be tendered through the B&NES BLOOM system.

9. What output will be produced and when will this be completed?

	Mark with an X	Date (mmm/yy)
Feasibility Study Report	<input type="checkbox"/>	
Option Development Report	<input type="checkbox"/>	
Option Appraisal Report	<input type="checkbox"/>	
Outline Business Case	x	Nov 2018
Full Business Case	x	Dec 2019
Other (please state)		

10. When do you plan to start and complete your project and what are the main project milestones? Please include the milestones related to the feasibility or development work to be undertaken through this application **and** the milestones for the subsequent implementation phase through to completion.

Milestone	Date (mmm/yy)
Out to tender	Jan 2018
Appointment	April 2018
Outline Business Case Submitted	Nov 2018
Statutory Powers and Procedures Granted	Nov 2019
Full Business Case Submitted	Dec 2019
Construction Start	April 2020
Completion	June 2021*

* Note: The outline business case will need to take account of the JSP mitigations to ensure the design accommodates the longer term aspirations. This information is being developed and will be ready by

April 2018. Therefore the outline business case would be submitted in Nov 18 and full business case 13 months later, allowing for planning approval.

Date approved by WECA Committee:	
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SCHEME: Hengrove

11. Lead Organisation

Bristol City Council

12. Partner organisations

n/a

13. Scheme contact details

Name:	Emily Price	
Email:	Emily.price@bristol.gov.uk	
Telephone:		

14. Scheme Type – mark with an X

Transport	<input checked="" type="checkbox"/>
Non-Transport Housing Enabling	<input checked="" type="checkbox"/>
Business Support	<input type="checkbox"/>
Skills	<input type="checkbox"/>
Other (please specify)	

15. Is this investment linked to any others within the early investment or wider Investment Fund programme? If so please set out the relationship and linkages.

Details: WECA's Forward Funding Housing Infrastructure Fund includes an ask of £35m for housing enabling funding for Hengrove. Together with £8m from WECA, this will provide the funding required to provide the infrastructure requirements to release c 2000 new homes.
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16. Total Funding required for this phase of works (£)

	17/18	18/19	19/20	Total
Investment Fund	£400,000	£400,000	0	£800,000
Match Funding				
- HCA Housing zone Capacity Funding (£224k)	£500,000	£500,000	0	£1,000,000
- Bristol City Council Capital programme (£776k)				

17. Please describe the scheme to be developed (including its objectives and expected impacts) and the proposed activity to be undertaken through this investment.

Details of the scheme to be delivered:

As a significant land owner within Hengrove, the Council wishes to use its land assets to drive the delivery of high quality mixed tenure housing. A clear vision and delivery framework has been established, a dedicated programme board and project team has been assigned to this priority area.

Historically, there has been a lack of market led residential development in this area.

Hengrove Park, the largest of the development sites has a number of constraints which need to be unlocked before housing development is deliverable.

To accelerate the delivery, infrastructure funding is sought to allow the Council to act as master developer and install the social and physical infrastructure upfront and dispose of serviced land parcels to developer partners on land owned by the Council at Hengrove Park and Hartcliffe Campus, with conditions to comply with the requirements of the design codes. This will stimulate a market shift and create a buoyant local housing market which meets local housing need.

The infrastructure required includes:

- Onsite highway infrastructure including new access and junctions from Hengrove Way and Bamfield, plus north-south and east west links.
- Improvements to William Jessop Way
- Strategic utilities to service the development parcels (including gas, electricity, water supply, waste water, telecoms, storm water attenuation,
- Ground contamination – remediation, demolition
- Public realm – delivery of a new park
- Education – provision of additional primary school places
- District Heating
- Land clearance – relocation of existing rugby club and provision of off-site facilities.

Details of the activities to be undertaken through this feasibility or development phase:

- Activities to be undertaken at this phase include design, surveys, planning, TRO, consultation and Project Management costs.

18. Please set out how the activities will be managed and resourced. If use of consultants or other third parties is proposed please describe how these have been, or will be procured

Bristol City Council has established a dedicated programme board to oversee delivery and appointed a dedicated Senior Project Manager to lead the delivery of housing led development in this area.

The Housing Delivery Board reports to Bristol City Council Homes Board, chaired by Cllr Paul Smith, which is a partnership that brings together different areas of the housing sector to tackle housing issues in the city.

A dedicated multi skilled housing team is being established to drive the delivery of housing across the City. The Council has a wealth of experience of leading and delivering residential led development in Bristol having recently directly delivered and enabled partners to develop new homes.

A full multi disciplinary team is in place to secure planning consents for housing and infrastructure at Hengrove Park and Hartcliffe Campus. If this application is successful the Council will consider procuring the same team through OJEU compliant Scape Framework to continue with the detailed infrastructure design and develop the business case to secure infrastructure funding.

19. What output will be produced and when will this be completed?

	Mark with an X	Date (mmm/yy)
Feasibility Study Report	<input type="checkbox"/>	
Option Development Report	<input type="checkbox"/>	
Option Appraisal Report	<input type="checkbox"/>	
Outline Business Case	<input type="checkbox"/>	
Full Business Case	<input checked="" type="checkbox"/>	Autumn '18
Outline planning consent for c2000 new homes	<input checked="" type="checkbox"/>	Autumn '18

20. When do you plan to start and complete your project and what are the main project milestones? Please include the milestones related to the feasibility or development work to

be undertaken through this application **and** the milestones for the subsequent implementation phase through to completion.

Milestone	Date (mmm/yy)
Submit outline planning application for Hartcliffe Campus	12/2/18
Submit outline planning application for Hengrove Park	1/4/18
Planning consent granted Hartcliffe Campus	31/7/18
Planning consent granted for Hengrove Park	31/8/18
Detailed scheme design for highways infrastructure	30/9/18
Business Case for infrastructure investment	30/10/18

Date approved by WECA Committee:	
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West of England

Full Business Case

Real Time Information Systems Upgrade

		Originated	Reviewed	Authorised	Date
1	Version 1.0	Matthew Barrett/Tom Alexander	Bill Davies		18/10/2017
2	Version 2.0	Matthew Barrett/Tom Alexander	Bill Davies/Ed Plowden		19/10/2017
3					
4					
5					

Redactions have been made to this Business Case where information relates to a commercially confidential procurement.

Executive Summary

Bus based-public transport are essential to the vitality and effective functioning of city regions including the West of England. Buses help reduce levels of traffic congestion which the West of England's Joint Transport Study has forecast to cost £800 million per year if no action is taken to address its impacts. Bus services also play a vital role in providing and improving access to employment, education and retail opportunities particularly for those living and/or working in deprived areas.

Real Time Passenger Information (RTI) has provided a major uplift in the quality and reliability of bus services in the West of England. RTI provides passengers with a clear reassurance that their bus is operating, and via a 'countdown' display at stops, piece of mind regarding arrival time of the service. This is particularly crucial for more vulnerable passengers including women, the elderly and young people. RTI also plays a role in attracting new passengers, thereby reducing car dependency, tackling traffic congestion and improving air quality, in line with the objectives of the current Joint Local Transport Plan and the future Transport Vision set out in the Joint Transport Study.

Bristol City Council have undertaken a procurement on behalf of the West of England councils to replace and upgrade the current RTI system. [REDACTED], to deliver the upgrade provided through the procurement to improve the efficiency and quality of the information provided to the passenger. This investment will be matched by a seven year revenue investment by the West of England councils, contributions from private sector bus operators and future capital investment in expanding the system (such as through major transport schemes including the MetroBus Rapid Transit network).

1 Strategic Case

1.1 State Aid Considerations

- 1.1.1 Whilst this submission is an application for state funding, it does not give an advantage to one undertaking over others (as it helps fund an existing, robust procurement for equipment and maintenance already underway), it does not distort or have the potential to distort competition, and it does not affect trade between Member States.
- 1.1.2 We have assessed the procurement process which was open and transparent and are content that there is no over compensation to the provider as the costs reflect prevailing market rates.

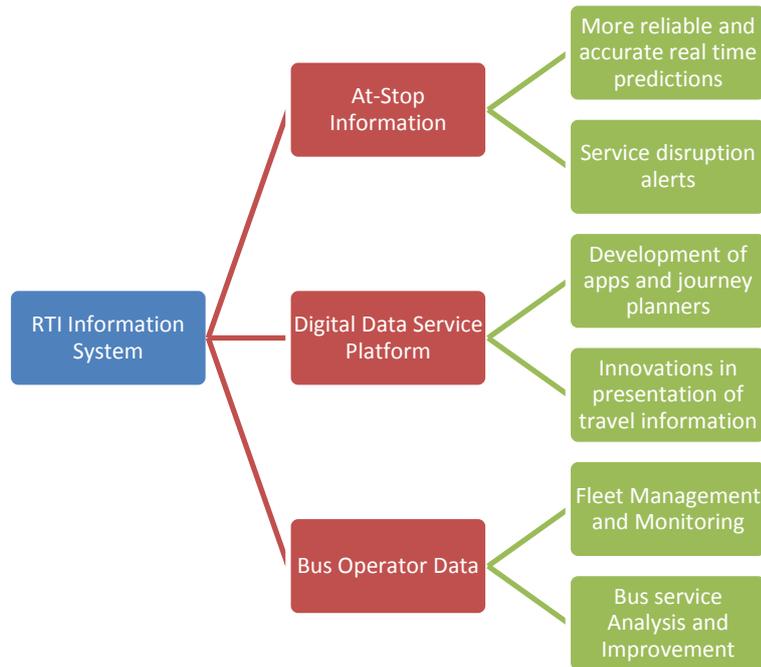
1.2 Project Description

- 1.2.1 [REDACTED]
- 1.2.2 After 8 years and a contract extension the current RTI contract will come to an end on 31st March 2018. After this date, the availability of an RTI system in the West of England is dependent upon the re-procurement of an RTI system.
- 1.2.3 During the 8 year lifetime of the current contract there has been significant technological progress in this field. The re-procurement, therefore, has come at an auspicious time and is an opportunity to develop the breadth and capability of the RTI system.
- 1.2.4 Bristol City Council, as previous lead authority on RTI for the sub-region, commenced with re-procurement of the RTI system in April 2016 in partnership with the other Unitary Authorities and participating bus operators.
- 1.2.5 As part of the procurement process officers undertook soft market testing and benchmarking / evaluation of the RTI systems in other local authorities. These exercises helped to assist the development of the specification, project timescales and transitional arrangements.
- 1.2.6 In addition to the at-stop information, the new upgraded RTI systems will provide an enhanced platform for expanding and improving existing digital services such as apps, trip planners etc, and developing new digital services in the future, e.g formats that will support digital personal assistants. This will extend the benefits of RTI far beyond the at-stop displays.
- 1.2.7 The RTI systems are also a critical element of the bus operators' management of their bus fleets and service operations. The upgraded system will provide improved functionality and monitoring to bus operators, as well as enabling more extensive use of selective priority for late-running buses at traffic lights which will translate to improved service efficiency and reliability.

1.3 Project Objectives and Case for Change

1.3.1 The RTI re-procurement will deliver benefits for passengers through three key channels as summarised in the diagram below.

Figure 1 - Delivering Passenger Benefits



1.3.2 The upgraded RTI system will deliver enhancements to the passenger experience. Key benefits include:

- Improved accuracy and reliability
- Better bus fleet management for operators, resulting in more efficient operation and improved / expanded services.
- Better alert systems where there are incidents or delays to services
- Improved accessibility & functionality for people with disabilities
- Extended use of selective bus priority at traffic lights.
- More remote fixing of faults
- A platform for expanding and improving digital services - e.g apps, trip planners, digital assistants, as well as providing data to other information providers -e.g google - extending access to RTI far beyond the 1,000 at-stop displays.

1.3.3 The system enhancements highlighted above will help to improve the attractiveness of bus services and encourage passenger growth.

1.3.4 Increased patronage will help to support the objectives of Joint Transport Study which sets a target of increasing the modal share of public transport from 9% in 2011 to 17% by 2036.

1.3.5 The RTI system will also be a valuable source of information to help inform strategic decisions. For example, it could be used to identify pinch points on the road network where bus services are delayed or journey times are inconsistent and unreliable.

- 1.3.6 The monitoring of bus journey times via RTI, will allow for more accurate timetabling of services to the prevailing traffic conditions.
- 1.3.7 The system will help to improve bus journey times through the expansion of the existing Traffic Signal Priority (TSP) network through both 'central' and 'local' TSP systems.
- 1.3.8 The re-procurement will take advantage of the latest technological innovations in RTI, for example, GPRS communications to all displays, AVL via ETM, central TSP, new display designs/functionality and bus to base communications via Voice Over IP – VOIP. This additional functionality will ensure that the system is more robust and reliable ensuring that service users demands are met.
- 1.3.9 The new RTI system will better support the needs of people with disabilities through improved passenger information such as taking displays, tailored apps, on-bus next stop announcements and displays, so that they can live a more independent lifestyle.
- 1.3.10 The re-procurement will provide improved alert systems where there are incidents or delays to bus services.
- 1.3.11 The new RTI system will provide a data platform for expanding and improving digital services. Data feeds will present opportunities to develop software and deliver innovative solutions to present travel information. As well as extending the reach of RTI beyond the 1000 at-stop displays, the data platform will be an opportunity for the West of England's entrepreneurs and SMEs in the technology sector.

1.4 Rationale for Public Intervention

- 1.4.1 This submission will facilitate the continuation of a core public service.

1.5 Strategic Fit

- 1.5.1 The local bus network plays a key role in supporting the spatial strategy of the West of England area. The Joint Transport Study (JTS) highlights the need to improve accessibility from residential areas to areas of employment through improved transport networks and acknowledges that our current transport systems are inadequate to support future growth. Facilitating the movement of people is a key driver in enabling future economic growth, and improving the competitiveness of the West of England, attracting investment and jobs to the region.
- 1.5.2 The JTS recognises that car ownership levels in the West of England area are amongst the highest for city regions in the UK and that the modal share for bus transport is amongst the lowest. It follows, therefore, that there is an opportunity to encourage modal shift away from the private car towards more sustainable modes if these modes can be made more attractive.
- 1.5.3 The region currently benefits from over 60 million bus journey per year and the West of England is one of the few areas where the bus market is growing thanks to the ongoing investment by the local authorities in partnership with local operators. People travelling by buses are estimated to account for around 29% of spending in cities, with an estimate of around £30 spent per trip on retail and leisure activities in town and city centres.

- 1.5.4 Effective transport information is vital to retaining and growing bus patronage and real-time information systems are at the core of the region's information offer. Surveys have shown that the introduction of RTI systems can result in a direct 1-3% uplift in bus patronage.
- 1.5.5 The JTS recommends the development of Major Public Transport Schemes along several key transport corridors in the region. RTI systems are an integral part of modern bus based transport systems and re-procurement of an RTI system is fundamental to achieving the vision set out in the JTS.

1.6 Options Appraisal

- 1.6.1 An options appraisal was undertaken prior to the re-procurement process being initiated.
- 1.6.2 Consideration of the 'Do Nothing' option concluded that RTI had become a core public service and was a vital element to improve public transport. Continued improvements and growth of public transport use underpin the economic growth of the region (as noted in section 1.5), so the removal of all RTI information systems was not considered to be a viable option.
- 1.6.3 Options to continue with the existing contract was discounted as the contract could not be extended any further.
- 1.6.4 An option for a procurement waiver was considered but procurement specialists advised against taking this route. In addition, this option would not have provided an opportunity to upgrade the RTI systems to be fit for purpose and enable the development needs of the next 10 years. Cost increases would be likely from renegotiating the contract with the supplier.
- 1.6.5 Full re-procurement including system upgrades to deliver improved efficiency and quality was considered to be the best performing option.

1.7 Environmental Sustainability Considerations

- 1.7.1 The re-procured central RTI system and hardware will have a number of sustainability benefits, by reducing power consumption, extending the operational life of on-street hardware and electronics.
- 1.7.2 Improved fault reporting and remote management of the system will reduce the number of site visits and servicing which have CO2 benefits by reducing the annual vehicle mileage associated with the contract.
- 1.7.3 The system will also enable efficiencies and better management of bus services and disruptions which will have emissions benefits.
- 1.7.4 As noted above, RTI has a proven contribution to growth in bus passenger numbers. Bus patronage in the West of England is growing, bucking a national trend of decline, and its importance will continue to grow against the backdrop of addressing future growth in the West of England as set out in the Joint Transport Study, including tackling traffic congestion and addressing poor air quality.

1.8 Equality and Diversity Impact Assessment

- 1.8.1 Improvements to bus services enhances access to travel and employment opportunities for those without access to a car – who currently represent around 30% of households, focussed in more deprived wards or those with more specific requirements.
- 1.8.2 The new RTI systems will offer improved functionality for disabled users, particularly visually impaired people, including at-stop audio systems.
- 1.8.3 The procurement of a more advanced RTI system will also provide a platform for improved digital services and open-data that will facilitate the development of services specifically aimed at enhancing access to information for disadvantaged groups (e.g. in-app functionality and speech functions).
- 1.8.4 The new system will also enable improvements to web sites and apps - including vehicle location, interactive route mapping, better alerts, warnings of delays, diversions and closures. These facilities will enhance accessibility and provide reassurance to passengers.
- 1.8.5 The new system will also deliver enhancements to the on-street information displays (adjustable colours & contrasts etc) which will be of benefit to visually impaired users.
- 1.8.6 An EQIA relevance check has been undertaken which indicated that a full EQIA assessment is not required.

2 Economic Case

2.1 Economic Appraisal

- 2.1.1 The total level of bus patronage in the West of England area is estimated at 63.7 million trips per Annum (DfT statistics). Public transport models (e.g. Centro's VURT Model) demonstrate that real time information provision can have a significant impact on bus passenger uplift. Modelling for expanding the provision of RTI on specific corridors in Bristol predicted an uplift ratio for boarding numbers after implementation of 0.8%. This level of passenger uplift translates to 1,019 unique additional passengers per day, once annualisation and two-way trip conversion factors are applied. Of these additional passengers, it is estimated that up to two thirds could be transferred trips from other modes, with the remainder being new trips. Therefore, the uplift in passenger numbers could include 340 new two-way trips per day across the West of England.
- 2.1.2 The procurement specification for the new RTI system delivers significant passenger benefits in addition to the current RTI provision (as outlined in section 1). The passenger uplift ratio of 0.8% (as cited above) is at the lower end of expectations for a cutting edge RTI system and it is predicted that patronage growth attributable to the new RTI system will exceed this figure.
- 2.1.3 Around 21% of all bus trips are for commuting and business. Therefore, 21% of the new two-way bus trips could represent new FTE employees travelling to and from work. This would suggest that 71 new two-way trips, or 71 new FTE jobs have been facilitated by the project and the accessibility and connectivity improvements it delivers.
- 2.1.4 On average, the typical level of GVA generated per employee in the South West is around £26,000 per annum. Therefore, job creation at the scale of 71 FTE employees could generate £239,000 in GVA per annum.
- 2.1.5 Research conducted by Passenger Focus has highlighted that at-stop RTI information is seen as a major draw for non-bus users and is therefore a major factor in inducing modal change. Modal shift from cars to public transport options would have wider benefits for the West of England Area by reducing congestion and improving air quality.
- 2.1.6 Improvements in accessibility and other benefits would proportionately fall to more deprived wards in the West of England Area where household car ownership is lowest and reliance on bus services is highest.

2.2 Value for Money Statement

Table 2-1 - Value for Money

Total project cost	██████████
Grant sought (EDF/LGF/RIF)	£558,900
Net Quantified Benefits	£1,880,932 GVA
VfM indicator	GVA per £ spent: 3.08

Table 2-2 - Calculations and assumptions

Operational Stage Impacts	Estimate	Source	Comments
A. Annual Passenger Journeys on Bus Services in the West of England area	63.7 million	Department for Transport statistics (Table BUS0109a)	
B. Uplift factor (after implementation of RTI)	0.8%	Centro VURT Model	Estimate based upon predicted passenger uplift on corridors in Bristol.
C. Passenger uplift per annum	509,600	Estimate	$C = A \times B$
D. Annualisation Factor	250	Estimate	Weekday trips only
E. Passenger uplift per day	2038	Estimate	$E = C/D$
F. Unique passenger uplift per day	1019	Estimate	$F = E/2$ (two way trips converted to unique passengers)
G. Unique passenger uplift per day – new trips	340	Estimate	$G = F/3$ (one third of trips are new journeys, two thirds are transferred from other modes)
H. Proportion of bus journeys that are for commuting/business	21%	National Travel Survey, 2015	Table NTS0409-chart 1 data
I. Unique Passenger Uplift per day - new trips for commuting	71	Estimate	$I = G \times H$
J. Per employee GVA in West of England	£26,492	Annual Business Survey	Regional Value, South West
K. Proportionate GVA impact of scheme	£1,880,932	Estimate	$K = I \times J$

4 Commercial Case

4.1 Procurement

- 4.1.1 Bristol City Council, as previous lead authority on RTI for the sub-region, commenced with re-procurement of the RTI system in April 2016 in partnership with neighbouring unitary authorities and participating bus operators. Since this time WECA has become responsible by statute for bus information as noted by the WECA committee on 15/3/2017.
- 4.1.2 As noted in section 1.2, the procurement process for a new RTI contract for the region commenced in April 2016.
- 4.1.3 The procurement process included soft market testing with suppliers to help inform the specification, project timescales and handover arrangements.
- 4.1.4 Officers also met with other local authorities who had recently undergone re-procurement of their RTI systems in order to gain information that would assist with the design of the specification and other project objectives.
- 4.1.5 Due to the project timescales a six month contract extension with the incumbent supplier was agreed until 31st March 2018.
- 4.1.6 Tender bids were received and tender evaluation, clarifications and moderation undertaken between July and September. Officers from each of the four unitary authorities contributed throughout this process. A full tender report has been prepared and is available subject to the usual procurement confidentiality.
- 4.1.7 The contract can be awarded once funding and governance arrangements are agreed.
- 4.1.8 The RTI re-procurement process has also included a revision to the Bus Operator Agreement. This needs to be agreed and signed by all participating bus operators and Unitary Authorities.
- 4.1.9 An Inter-Authority Agreement (IAA) will also be required between WECA and its constituent authorities, with separate arrangements to be put in place for North Somerset Council. This will be based on apportionment of maintenance costs based on share of assets.

4.2 Operation and Financial Viability

- 4.2.1 The project will be managed as per the existing WoE delivery and financing structures with the amendments to reflect the recent transfer of responsibilities from three of the local authorities to WECA.
- 4.2.2 WECA will act as the lead authority. Co-ordinate the delivery of the RTI system including management of upgrades, the ongoing maintenance contract and performance monitoring. These arrangements will be covered in the IAA and can be fully transitioned to WECA at a later date should that be required.

4.2.3 The ongoing revenue costs for managing the RTI systems and maintenance will be met from the WECA levy (for Bristol, B&NES and South Gloucestershire Councils) and separately by North Somerset. This is largely a continuation of the delivery and financing structure that has functioned well for the past 7 years (with modifications to reflect the WECA responsibilities).

4.2.4 There are limited review periods for adjustments for price inflation in the contract which will give greater cost and budgeting certainty. The costs for the main systems upgrades are fixed in the tender.

4.3 Social Value Act

4.3.1 [REDACTED]

4.3.2 [REDACTED]

4.3.3 The environmental benefits of local bus services are noted in section 1.7, including their key role in improving air quality.

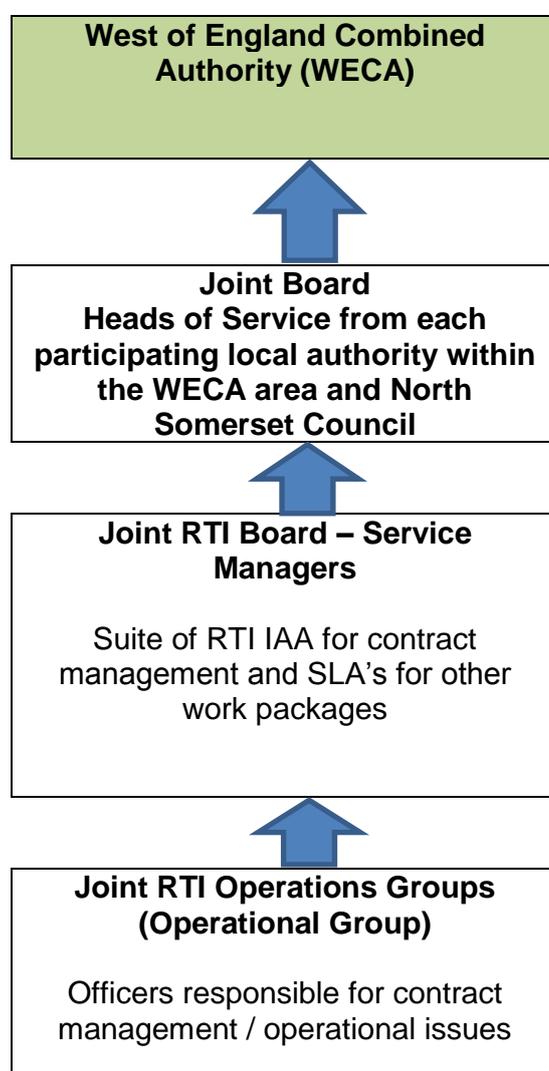
4.3.4 Improving the quality and reliability of the bus service has a strong social benefit, particularly for disadvantaged groups, in terms of access to employment and other opportunities.

5 Management Case

5.1 Promoter and Delivery Arrangements

- 5.1.1 Joint working arrangements are already established through the West of England's RTI working group. BCC will directly manage the contract on behalf of WECA with support from officers at B&NES, North Somerset and South Gloucestershire.
- 5.1.2 The delivery of the project will be overseen by the senior RTI officer as the project manager, co-ordinating with leads from the Authorities and Bus Operators where necessary.
- 5.1.3 WECA will act as scheme promoter. WECA governance/reporting arrangements are shown below.

Table 5-1 - Governance



5.2 Programme Plan

5.3 Risks, Constraints and Dependencies

5.3.1 Risk Log attached in Appendix 3.

5.4 Land Acquisition, Planning and Other Consents

Not applicable

5.5 Service Diversions

Not applicable

5.6 Engagement and Consultation

5.6.1 During the procurement process the Lead Authority, BCC, has sought to engage with other stakeholders including the officers from the other three local authorities in the sub-region and with participating bus operators.

5.6.2 Soft market testing was conducted with potential suppliers.

5.6.3 This is a technical project, largely upgrading internal systems and functionality therefore broader public consultation is not required at this stage. The project will enable future developments that deliver more public-facing improvements. These would require more input from external stakeholders but this is out of scope for this project.

5.6.4 At a strategic level, there is strong engagement with the public and stakeholders undertaken through the Joint Local Transport Plan, consultation on the transport major scheme programme and supporting business cases, and associated planning approvals. The West of England works in close partnership with bus operators (through partnership agreements and the West of England Bus Operators Association), Highways England and the Department for Transport.

5.7 Project Assurance

5.7.1 Specialist technical support on the RTI re-procurement including the specification for upgrading the system has been provided by consultants from CH2M.

5.8 Monitoring and Evaluation

5.8.1 Monitoring activities will focus on evaluating performance in the three key channels identified in section 1 namely,

- At-Stop Information
- Bus Operator Information
- Digital Data Service Platform

5.8.2 Objectives from within these three channels will be assessed using KPIs submitted by the preferred tenderer and Traveline data statistics.

5.8.3 In addition to the above, Monitoring related to the strategic objective of increasing patronage growth will be assessed through DfT regional bus patronage statistics and the annual bus passenger satisfaction surveys.

Appendices:

- Monitoring & Evaluation Form
- Logic Model
- Risk Log



Real Time Information Systems Upgrade

Full Business Case Monitoring & Evaluation Plan

1. Scheme background and context

Bristol City Council have undertaken a procurement on behalf of the West of England councils to replace and upgrade the current RTI system. The new system, will deliver improvements in the efficiency and quality of information provided to the passenger. This investment will be matched by a seven year revenue investment by the West of England councils, contributions from private sector bus operators and future capital investment in expanding the system (such as through major transport schemes including the MetroBus Rapid Transit network).

Key Milestone Completion Dates	Baseline
Commencement of RTI re-procurement led by BCC	April 2016
Award of Contract	November 2017
Construction Start on Site	December 2017
Contract with incumbent supplier ceases	March 2018
Central System and priority stops operational	April 2018
Annual Review of Contract Performance	November 2018
Annual Review of Contract Performance	November 2019
Annual Review of Contract Performance	November 2020
Annual Review of Contract Performance	November 2021
Annual Review of Contract Performance	November 2022
Annual Review of Contract Performance	November 2023
Re-Procurement of Contract Commences	April 2024
Annual Review of Contract Performance	November 2024
Annual Review of Contract Performance	November 2025
Contract Completion	November 2026

3. Evaluation design and methodologies

Key evaluation questions

- Have outputs been delivered?
 - Upgraded at-stop RTI displays.
 - Implementation of back office system architecture, including delivery of fleet management functionality.
 - Implementation of digital data platform

- Have measurable direct and indirect outcomes been achieved including:
 - Increase in passenger trips.
 - Uplift in GVA in operation stage.
 - Increase in bus passenger satisfaction scores.
 - Uptake of RTI data feeds for real time journey planning applications.

- Have any unanticipated outcomes been achieved?

Evaluation Methodology

Process – scheme delivery through contract supplier, engagement with bus operators and other stakeholders, lessons learned.

Combination of outcome and impact – by capturing metrics provided through the RTI contract itself and other data sources:

Audience

To be reported to WECA

4. Data requirements

4.1 Data collection methods

Bus passenger trips uplift: measured using DfT statistics provided quarterly and annually.

Bus Passenger Satisfaction: measured by analysis of National Travel Surveys.

Uptake of RTI data feeds: uptake of RTI data obtainable through Traveline and Bristol Open Data.

Contractual KPIs: measure of RTI system performance through contractual KPIs.

4.2 Data collection and establishing the baseline

- Refer to the scheme logic model to help structure the baseline data collection and reporting activities.

Metric	Unit	Frequency	Data source	Baseline date	Reporting to?
--------	------	-----------	-------------	---------------	---------------

<i>(inc. Target)</i>			<i>(& Responsibility)</i>		
Inputs					
<i>Investment Fund</i>	<i>£610k</i>	<i>Annual</i>	<i>grant claims – Finance Officer</i>		<i>WECA highlight report</i>
<i>Officer Resource</i>					
<i>Supplier Costs</i>					
<i>Bus Operator Resource</i>					
Outputs					
<i>Upgraded at stop RTI displays</i>	<i>%</i>	<i>Annual</i>	<i>Comparison of total number of displays with displays that have been upgraded.</i>	<i>Nov 2017</i>	<i>WECA highlight report</i>
<i>Implementation of RTI system architecture</i>	<i>n/a</i>				<i>WECA highlight report</i>
<i>Availability of digital data platform</i>	<i>n/a</i>				<i>WECA highlight report</i>
Outcomes and impacts					
<i>Increased number of passenger trips – increase in 0.8% bus service patronage.</i>	<i>Passenger trips</i>	<i>Annual</i>	<i>DfT statistics</i>	<i>Nov 2017</i>	<i>WECA highlight report</i>
<i>Improved reliability of bus journeys - increased passenger satisfaction 5 percentage point over first three years.</i>	<i>%</i>	<i>Annual</i>	<i>National Travel Survey</i>	<i>Nov 2017</i>	<i>WECA highlight report</i>
<i>Improved functionality – Contract KPIs</i>					
5. Delivery plan					

KPI data collated quarterly in accordance with contract and reported to RTI working group. RTI coordinator responsible for collating annual bus passenger statistics.

6. Resourcing and Governance

The budget for monitoring is built into the revenue costs. Reporting of KPIs is a contractual requirement and patronage figures and passenger satisfaction scores are freely available from external sources.

7. Dissemination

The evaluation will be used to improve future investment in Public Transport.

Logic Model

Context and Rationale					
Provide a brief description of the strategic and policy context (link to local and national strategy policy). Briefly describe the market failure rationale for the intervention.					
Objectives	Resources/ Input	Activities	Outputs	Direct & Indirect Outcomes	Impact
<p>The aims/ objectives of the scheme are:</p> <p>(Ensure that <u>all aims/objectives are SMART</u>)</p>	<p>In order to achieve the set of activities to fulfil these aims/ objectives we need the following:</p> <p>(Resources should not be limited to money e.g. grant, match funding, in-kind, project team, specialist support, etc. The inputs define the scope of the project being considered in the logic model)</p>	<p>In order to address the aims and objectives we will accomplish the following activities:</p> <p>(What will the money be used for? e.g. construction, project management, equipment/fit out, etc):</p>	<p>We expect that, once accomplished these activities will produce the following deliverables:</p> <p>(Provide measurable outputs e.g. length of new road/cycle path, m² of space constructed/refurbished, number of businesses supported, learners engaged, etc)</p>	<p>We expect that if accomplished these outputs will lead to the following <u>change</u> e.g. new products or services, skills, behaviour, new business/contracts, etc:</p> <p>(Ensure that <u>all outcomes are SMART and relevant</u> to the aims/objectives to allow for <u>attribution</u>; distinguish between direct and indirect outcomes)</p>	<p>We expect that if accomplished these activities will lead to the following changes in service, organisation or community:</p> <p>(quantitative economic impacts e.g. indirect jobs and/or GVA to be <u>cross-referenced</u> with FBC as appropriate)</p>
<ul style="list-style-type: none"> Provision of enhanced real time information system across West of England, <ul style="list-style-type: none"> Improved accuracy and reliability of at-stop information displays through better predictions and service disruption alerts. Digital data platform enabling innovation in travel planning tools, and increased penetration of bus information. Fleet management and strategic data improving route planning and resource management. 	<ul style="list-style-type: none"> Investment of £609,950 <ul style="list-style-type: none"> £558k WECA. £51k North Somerset Officer resource to procure, develop, deliver and manage the programme. Input from specialist advisers. Input and staff resource from bus operators. Input from elected members and other key stakeholders. Contractor time to deliver infrastructure and maintain system. 	<ul style="list-style-type: none"> Re-procurement of RTI system already in advanced stages with award of contract expected in November 2017. Programme for transition to new RTI systems will commence in December 2017. Contract management and monitoring. 	<ul style="list-style-type: none"> Improved RTI displays at 1000 bus stops in West of England. Upgrade to back office RTI system providing improved accuracy and more reliable real time predictions. Data that can be made available to third parties for development of travel and journey planning applications. Improved functionality for day to day bus fleet operations. 	<ul style="list-style-type: none"> Direct and indirect benefits during the operational stage amounting to approx. £1.8 million GVA. Estimated 500,000 additional passenger trips per annum across the West of England. Improved reliability in bus journey times leading to increased passenger satisfaction. At-stop disruption warnings, improving journey planning options for passengers, leading to increased passenger satisfaction. 	<ul style="list-style-type: none"> Increased access to job opportunities including access to the region's Enterprise Zones and Areas. Uplift in Employment in Enterprise Zones and Areas. Improved access to sustainable travel options. Reduced congestion, airborne pollutants and carbon emissions. Improved journey planning information and tools.

RISK LOG

PROJECT NAME:	West of England Real Time Information Re-procurement	PROJECT ID	
PROJECT MANAGER:	Ian Saywell	DATE LAST AMENDED	18/10/2017 - v1

KEY: Category - 'E/F' Economic/Financial; 'E' Environmental; 'L' Legal/Regulatory; 'O/M' Organisational/management; 'P' Political; 'S/C' Strategic/Commercial; 'T/O' Technical/Operational Likelihood/Impact - 4 = Very high; 3 = High; 2 = Medium; 1 = Low
 Priority Score - Red (12-16: Major/ Catastrophic Risk); Red/Amber (6-9: Moderate/ High Risk); Amber/Green (3-4: Low/ Moderate Risk); Green (1-2: Low Risk)

ID	Type	Category	Description	Likelihood	Impact	Priority	Date identified	Countermeasure or response	Residual			Owner / Actioner	Notes	Date of last update	Status	Related RAID ID
									Likelihood	Impact	Priority					
6	Risk	O/M	[REDACTED]					[REDACTED]				[REDACTED]				
7	Risk	T/O	[REDACTED]					[REDACTED]				[REDACTED]				
8	Risk	T/O	New RTI displays are easily damaged / vandalised inc scratching, graffiti, breakages, and/or discolour / crack	3	3	9	20/09/16	Specification includes requirement to use robust materials high IK ratings, and easy to replace items that could get broken, (e.g. screens). Specification informed by best practice elsewhere, appointment of an experienced contractor.	2	2	4	G Dean	Experience in West of England and elsewhere has shown that when specified correctly, this is not an issue	20/09/17	Open	
9	Risk	T/O	RTI system hardware and software fails in use and is not repaired in a timely manner	3	4	12	20/09/16	Specification needs to include a robust maintenance contract including short attend and repair times and suitable balance of risk on service credits between client and contractor. Specification needs to be for proven elements and not 'cutting edge' functionality.	2	2	4	G Dean	Service Credits to be based on similar amounts as with current contract. Will not apply to PMR system and on-bus equipment as this will become the responsibility of bus operators going forward.	20/03/17	Open	
10	Risk	O/M	Risk of delays in approving tender process and appointing supplier due to BCC internal approval / acceptance issues	3	3	9	20/09/16	Early engagement of internal BCC stakeholders including ICT with advice from Jane Iles	1	2	2	I Saywell		20/09/17	Open	
12	Risk	All!	New RTI Contractor goes out of business, meaning a loss of RTI	2	4	8	20/09/16	rigorous financial assessment process to determine stability as part of tender process. Also - possibly - supplier to put source code into a Escrow agreement.	1	3	3	J Iles / T Wilson	SMT indicates that most suppliers happy to have ESCROW agreement but will include costs as part of tender submission.	20/03/17	Closed	
13	Risk	L	Delays in agreeing / approving Inter-Authority Agreement holds up RTI procurement process	3	3	9	20/09/16	IAA drafted - awaiting amendments to reflect WECA governance.	1	3	3	I Saywell / T Wilson	IAA drafted. Can potentially be signed after the contract is awarded.	20/03/17	Open	
14	Risk	E/F	Cost escalation resulting in budget pressures -e.g. changes in exchange rates as a result of Brexit etc.	3	3	9	20/09/16	Tender includes specific unit costs and supplier is bound by these. Severe cost escalation may result in supplier being unable to meet contract requirements, potentially resulting in withdrawal from contract. Monitor contract costs, rapid implementation following award of contract should minimise risk.	2	2	4	I Saywell	Monitor closely and report any potential cost issues to Board at earliest opportunity to discuss appropriate course of mitigation action.	20/03/17	Open	
16	Risk	T/O	[REDACTED]					[REDACTED]				[REDACTED]				

ITEM: 9

**REPORT TO: WEST OF ENGLAND COMBINED AUTHORITY OVERVIEW
AND SCRUTINY COMMITTEE**

DATE: 24 October 2017

**REPORT TITLE: WECA AND MAYORAL BUDGET OUTTURN 2017/18:
REVENUE AND CAPITAL MONITORING APRIL 2017 TO
SEPTEMBER 2017**

**AUTHOR: TIM RICHENS, DIRECTOR OF INVESTMENT AND
CORPORATE SERVICES**

Purpose of Report

- 1 This Budget Outturn report will be considered by the WECA Committee at their meeting on 30th October 2017. The detailed report will be shared with the WECA Scrutiny Committee when it is published on 20th October 2017.

Issues for Consideration

- 2 The Budget Outturn Report will present the revenue and capital financial outturn budget monitoring information for WECA and the Mayoral budget for the financial year 2017/18 based on actual data for the period April to September 2017/18.
- 2.1 The report will also seek approval of one-off budget virements to meet anticipated transition costs and interim resources for Housing and Transport delivery, together with an ongoing budget variation to meet the costs of the proposed WECA staffing resources. All such costs are within the existing available funding.

Recommendation:

3. That the WECA Scrutiny Committee consider the report.

West of England Combined Authority Contact: Tim Richens, Tel: 0117 428 6210

ITEM: 9

REPORT TO: WECA Committee

DATE: 30 October 2017

**REPORT TITLE: WECA AND MAYORAL BUDGET OUTTURN 2017/18:
REVENUE AND CAPITAL MONITORING APRIL 2017 TO
SEPTEMBER 2017**

**AUTHOR: TIM RICHENS, DIRECTOR OF INVESTMENT &
CORPORATE SERVICES**

Purpose of Report

1. This report presents the revenue and capital financial outturn budget monitoring information for WECA and the Mayoral budget for the financial year 2017/18 based on actual data for the period April to September 2017/18.
2. The report also seeks approval of one-off budget virements to meet anticipated transition costs costs and interim resources for Housing and Transport delivery, together with an ongoing budget variation to meet the costs of the proposed WECA staffing resources. All such costs are within the existing available funding.

Issues for Consideration

3. The WECA Financial Regulations requires that the WECA Committee considers the revenue and capital monitoring position at regular intervals throughout the financial year.
 - 3.1. Separately on the agenda for this meeting are various proposals for further allocations of funding and these are not reflected in this report. The specific financial implications are clearly set out in those reports.
 - 3.2. **Appendix 1 outlines the Mayoral Fund's current outturn revenue position** for the 2017/18 financial year. This shows the current forecast position is £195K underspent. The main points to note are:
 - 3.2.1. Salary costs are £28k lower than budgeted due to the timing of appointment to the mayoral support role.
 - 3.2.2. The costs of the Mayoral Election, overseen by Bristol City Council, are currently forecast to be approximately £200k lower than budgeted, pending final payment of all associated liabilities.

- 3.2.3. The consequent contribution required from WECA Budget is forecast to be £195k lower than originally estimated.
- 3.2.4. The Mayoral Budget now includes £1.2m to provide grant funding in respect of Joint Spatial Plan Scheme Development as agreed by WECA on 15 September 2017.
- 3.3. **Appendix 2 outlines WECA's current outturn revenue position** for the 2017/18 financial year. This shows the current forecast position is £1.318M underspent comprising a £733k underspend on expenditure and a £585k surplus on income. The main points to note are:
- 3.3.1. Staff costs are forecast to exceed the current budget allocation by £176k due to the need to engage short term interim resources to support delivery of Housing and Transport priorities, including housing investment bids and transport services. Additionally, further one-off transitional costs relating to recruitment and part-year salaries of up to £130k (**as set out at Appendix 4**) will be required. A total one-off virement of up to £306K is requested from underspending budget heads to cover this one-off cost.
- 3.3.2. The Staff Budget for WECA was originally agreed in March 2017 to facilitate the initial set-up and establishment of the WECA and ensure initial delivery of key statutory functions. Following the election of the Mayor and the clarification of ongoing delivery and resourcing requirements, the CEO has identified a proposed sustainable staffing structure as set out in more detail at **Appendix 4**. The cost of this structure is within the overall resources available to the WECA and will not require any funding from the constituent councils indeed, it is anticipated that savings will be generated for the councils from the LEP staffing budget as the balance of roles becomes clearer going forwards (this will be reported separately to the Joint Committee). A recurring budget adjustment is sought to enable the implementation of the proposed structure to commence – the full year recurring impact of which is estimated at £353K. This adjustment will also be reflected in the Budget proposal for 2018/19.
- 3.3.3. Transport - concessionary fares costs are currently projected to underspend by an estimated £522k due to lower than anticipated demand (reduced patronage) for this service. Further work will be necessary to establish if this is due to one-off factors or if this indicates a longer-term trend. Other transport functions (community transport and bus information services) are currently projected to be in-line with budget although Real Time Information is covered as part of a separate Report on this agenda.
- 3.3.4. A one-off financial provision was made within the budget to recognise the likely initial set-up costs of the WECA. A £101k underspend is currently projected, largely related to lower anticipated furniture and equipment costs arising from the new office set up.
- 3.3.5. As set out in para 2.1.3 above, there is a reduced forecast contribution to the Mayoral Fund of £195k.
- 3.3.6. Income – interest earnings on the WECA cash holdings are £210k higher than anticipated. All investments are in-line with the approved WECA Treasury Strategy and further details are set out in the Treasury Outturn Report also on the agenda for this meeting. In addition, the estimated WECA 5% share of business rates under the 100% Business Rates Retention Pilot are currently estimated to be £325k in excess of budget based on the rates business rate growth forecasts provided by the constituent councils – the majority of growth (94%) is now retained by the constituent councils under the pilot arrangements. The 100% pilot itself is currently agreed to

continue until 2019/20 – beyond this is subject to ongoing discussions with government and the implementation of the national 100% rates retention system from 2020/21.

3.3.7. Subject to the approval of the one-off virement, the WECA revenue budget is estimated at £1.3M underspent. This position will continue to be monitored and reviewed including consideration as part of the 2018/19 budget process to identify the recurring elements and the potential to pass funding through to the constituent councils, noting that the WECA was not established with any financial reserves.

3.4. Appendix 3 outlines the current capital budget forecast for the 2017/18 financial year.

This shows the current forecast position is a small overspend of £43k which is fully offset by associated revenue underspending. The main points to note are:

3.4.1. Infrastructure (Economic Model and Project Development) costs are forecast to budget at this point.

3.4.2. The WECA Office and IT costs shows a small £43k overspend on capital costs which has been fully offset by reductions in revenue set up costs as set out in Para 3.3.4.

3.4.3. The Highways and Transport grant payments are in line with Budget and have been updated to reflect the additional Pothole Funding grant approved by WECA Committee in June 2017.

3.5. The WECA also acts as the Accountable Body for a range of Government Grant Funding Streams including Local Growth Fund, Revolving Infrastructure Fund, WoE Growth Fund, Economic Development Fund etc. These funds are administered by WECA on an “agency – zero cost basis” with all related costs met directly from approved allocations within the funding streams. Further details are set out in the Budget Outturn reports to the West of England Joint Committee.

Consultation:

4. Consultation has been carried out with the Chief Executive, WECA Interim Directors and the Monitoring Officer in arriving at the Budget Forecasts.

Other Options Considered:

5. None.

Risk Management/Assessment:

6. This report forms a core part of the WECA's governance and risk management process. The forecast budgets presented in this report take account of known financial risks and their potential impact on the outturn financial position.

Public Sector Equality Duties:

7. All key service delivery functions continue to be delivered by the relevant constituent councils and impact assessments for service delivery, particularly highways and transport are included as appropriate within their individual Budget reports. Specific provision was put into place to ensure that the Concessionary Travel scheme across the WECA area is consistent in line with the highest common denominator

Economic Impact Assessment:

8. There are no Economic Impacts arising as a result of this report.

Finance Implications:

9. The financial implications are contained within the body of the report.

Legal Implications:

10. This report monitors how WECA and the Mayoral Fund are performing against the financial targets set in March 2017 through the Budget setting process in accordance with the WECA Order 2017 and the Combined Authorities Financial Order 2017.

Environmental Implications:

11. There are no environmental implications arising as a result of this report.

Land/Property Implications;

12. There are no land/property implications arising as a result of this report.

Human Resources Implications:

13. These are set out in the body of the report, including the use of interim staffing resources and the proposals for the on-going WECA staffing resources.

Recommendations:

14. The WECA Committee agrees that:

- 14.1. The Mayoral Fund and WECA revenue and capital budget outturn budget forecasts as set out in Appendices 1,2 and 3 are noted.**
- 14.2. That a one-off virement of up to £306k from the WECA Supplies and Services Budget to the WECA Staffing Budget be approved to cover short term interim resources as set out in para 3.3.1.**
- 14.3. That an on-going Budget variation of £353K (full year effect) from the WECA Income Budget to the WECA Staffing Budget be approved to meet the costs of the proposed WECA Staffing Structure as set out in Appendix 4.**

Report Author: Tim Richens, Director of Corporate Services

Appendices & Background Papers:

- Appendix 1: Mayoral Fund Revenue Position
- Appendix 2: WECA Revenue Position
- Appendix 3: Mayoral Fund and WECA Capital Position
- Appendix 4: Proposed Staffing Resources

West of England Combined Authority Contact:

Any person seeking background information relating to this item should seek the assistance of the Contact Officer for the meeting who is **Tim Richens** and who is available by telephoning Joanna Greenwood on 0117 426210; writing to West of England Combined Authority, 3 Rivergate, Temple Way, Bristol BS1 6ER; email: Joanna.greenwood@westofengland-ca.gov.uk

APPENDIX 1

Mayoral Fund April to September 2017/18			
	£000's		
	Budget	Forecast	Variance
<u>EXPENDITURE</u>			
Staff	135	107	28
Supplies & Services			
Expenses	15	15	0
Election costs	1,645	1,445	200
Support Services costs	15	49	(34)
Joint Spatial Plan Scheme Development	1,200	1,200	0
Capital RCCOs:			
Transport grants	5,183	5,183	0
Highways Maintenance grants	11,328	11,328	0
Highway Incentive grants	1,061	1,061	0
Total supplies and services	20,447	20,281	166
Total Expenditure	20,582	20,387	195
<u>INCOME</u>			
Business Rates Retention income	17,572	17,572	0
Funding from WECA	3,010	2,815	(195)
Total Income	20,582	20,387	(195)
NET TOTAL - Under / (Over) Spent	0	0	0

APPENDIX 2

WECA Fund April to September 2017/18			
	£000's		
	Budget	Forecast	Variance
<u>EXPENDITURE</u>			
Staff	973	1,149	(176)
Supplies & Services			
Expenses	50	50	0
Support Services	246	167	79
Property costs	190	177	13
Implementation and set up costs	1,650	1,549	101
Concessionary fares	13,209	12,687	522
Community transport	1,702	1,702	0
RTI costs	371	371	0
WECA contribution to Mayoral fund	3,010	2,815	195
Total supplies and services	20,427	19,518	910
Total Expenditure	21,400	20,667	733
<u>INCOME</u>			
Levy from CAs for WECA Transport functions	15,281	15,281	0
Net Business Rates Retention - income	945	1,270	325
Gainshare - revenue contribution	5,084	5,084	0
Interest on balances	90	300	210
Other income	0	50	50
Total Income	21,400	21,985	585
NET TOTAL - Under / (Over) Spent	0	1,318	1,318

APPENDIX 3

WECA and Mayoral Capital Programme Monitor 2017/18 to 20/21													
	Forecast Spend						Funded by:						
	Budget	Forecast	Variance	Indicative	Indicative	Indicative	17/18				18/19	19/20	20/21
	17/18	17/18	17/18	18/19	19/20	20/21	Gainshare	DfT Grant	RCCO	Total	RCCO	RCCO	RCCO
	£'000			£'000	£'000	£'000	£'000		£'000	£'000	£'000	£'000	£'000
WECA Capital													
Infrastructure													
Economic Model & Scheme Prioritisation	400	400	-				400		400				
	400	400	-				400		400				
WECA Capital - other													
IT & Building Alterarions	300	343	(43)				343		343				
	300	343	(43)				343		343				
Mayoral Capital									-				
Highway and Transport Grants	20,475	20,475	0	17,572	17,572	17,572	-	2,903	17,572	20,475	17,572	17,572	17,572
Pothole Action Grant (WECA Cttee June 2017)	891	891	0					891	891				
	21,366	21,366	-	17,572	17,572	17,572	-	3,794	17,572	21,366	17,572	17,572	17,572
Grand Total	22,066	22,109	(43)	17,572	17,572	17,572	743	3,794	17,572	22,109	17,572	17,572	17,572
Note: RCCO indicates a Revenue Contribution to Capital Outlay													

WEST OF ENGLAND COMBINED AUTHORITY

Proposed Staffing Resources

Purpose of Paper

The purpose of this paper is to inform the decision making on the requests for:

- A one-off budget virement for 2017/18 of £306K to the staffing resourcing budget to provide interim capacity and support recruitment of permanent staff resources.
- To increase the annual staffing resource budget from £903K to £1.256m (+£353K) from 2018/19.

Introduction

The West of England Devolution deal includes money, powers and responsibilities to deliver economic growth for the region through investments and interventions to:

- Support business and innovation
- Develop the skills it needs, and,
- Develop the infrastructure to support success.

The deal comprises our commitments to government to deliver against an agreed implementation plan and to meet with the requirements of the 5 and 10 year gateway reviews in return for money and powers to enable us to deliver against these requirements. In addition to the overriding objective of delivering economic growth, our region also agreed secondary objectives of delivering growth from which everybody in the region can benefit and protecting the environment.

The new money coming to the region as a part of the devolution deal includes the devolution grant of £30m per annum (£15m revenue and £15m capital), the £18m+ per annum coming from the business rates retention pilot (the majority of this money goes directly to the constituent authorities) and the money paid through the combined authority for the higher rate of highways maintenance.

In addition to the initial devolution deal, there is now the opportunity for the region to make the case for further money and powers to invest in the future of the region. We are currently in negotiations with central government for a Housing Investment Fund and for a Housing deal to help us to deliver the homes our region needs.

The staff in the LEP office were transferred across to the Combined Authority at the beginning of May 2018 and an interim budget was set for the additional WECA responsibilities at the WECA Budget meeting in March 2017. This budget provided for the Statutory Officer posts, delivery of statutory functions and a minimal provision for new responsibilities.

Now the Mayor has been elected and the work has commenced, there is a need to review that initial budget to enable WECA to fulfil its obligations and capture the new opportunities offered for additional funding and powers for the region. Whilst there is a commitment in the region to keeping the Combined Authority staffing lean and focused and to use resource available in authorities where there is the capacity and skills available, WECA needs

sufficient resources to work effectively with its constituent authorities in fulfilling its requirement (including being able to fund any authority staff seconded to work on WECA functions) and capturing new opportunities and money for the region.

WECA's staffing and running costs are funded from the new money secured as a part of the deal through the business rates retention pilot. (WECA's costs are not paid by its constituent authorities). 5% of the business rate retention pilot money goes directly from government to WECA. Overall WECA is currently underspending on its running costs and generating additional income and is therefore projected to be some £1.3m underspent overall. There are some pressures on its staffing costs which have resulted due to the need for WECA to meet with its commitments and secure further money and powers for the area.

Virement request for 2017/18

The resources paper is proposing a virement for 2017/18 to move some of the money from its underspending budget heads (which are currently £1.3m underspent) into its staffing budget.

The virement required comprises:

- £176K to address existing pressures created by the commissioning of additional interim resources for the region to support the work to secure a HIF and Housing Deal for the region
- Up to £130K to support the recruitment to essential posts, transitional costs and meet the related increased salary costs for remaining part of the financial year

There is the need to progress the organisation change required to ensure that WECA's resources are in the right place and that staff have the right skills to fulfil the functions to deliver both the devolution deal and the existing LEP functions. There are savings to be achieved from the baseline LEP budget through this change which will include measures to centralise functions currently distributed across teams, such as administrative support and marketing, to secure economies of scale. However, to progress the change the priority is to recruit to key areas of the organisation where there are gaps including:

- Administrative and governance support including supporting the Committees, advisory boards, the LEP Board and Scrutiny has been running almost entirely on temporary staff and there is a need to urgently build an adequate, stable and permanent structure to support these boards and committees
- The staffing resource in housing and planning is insufficient to support the additional work and opportunities created by the Housing Investment Fund and the Housing Deal
- The communications resource needs increasing and a permanent team needs to be put in place
- Additional support will be required for the remainder of the year to ensure that we can meet the transport requirements set out in our devolution deal.

The transition from the existing structure to the new structure will ensure that resources are focused on priorities and that staff have the necessary skills. There will be one-off transitional costs incurred in this financial year, estimated up to £130K.

Reason for the additional base budget

Following the election of the Regional Mayor, the work with WECA and its constituent authorities to take on the additional powers and functions as set out in the devolution deal and to capture new money and powers has progressed and, it is apparent that:

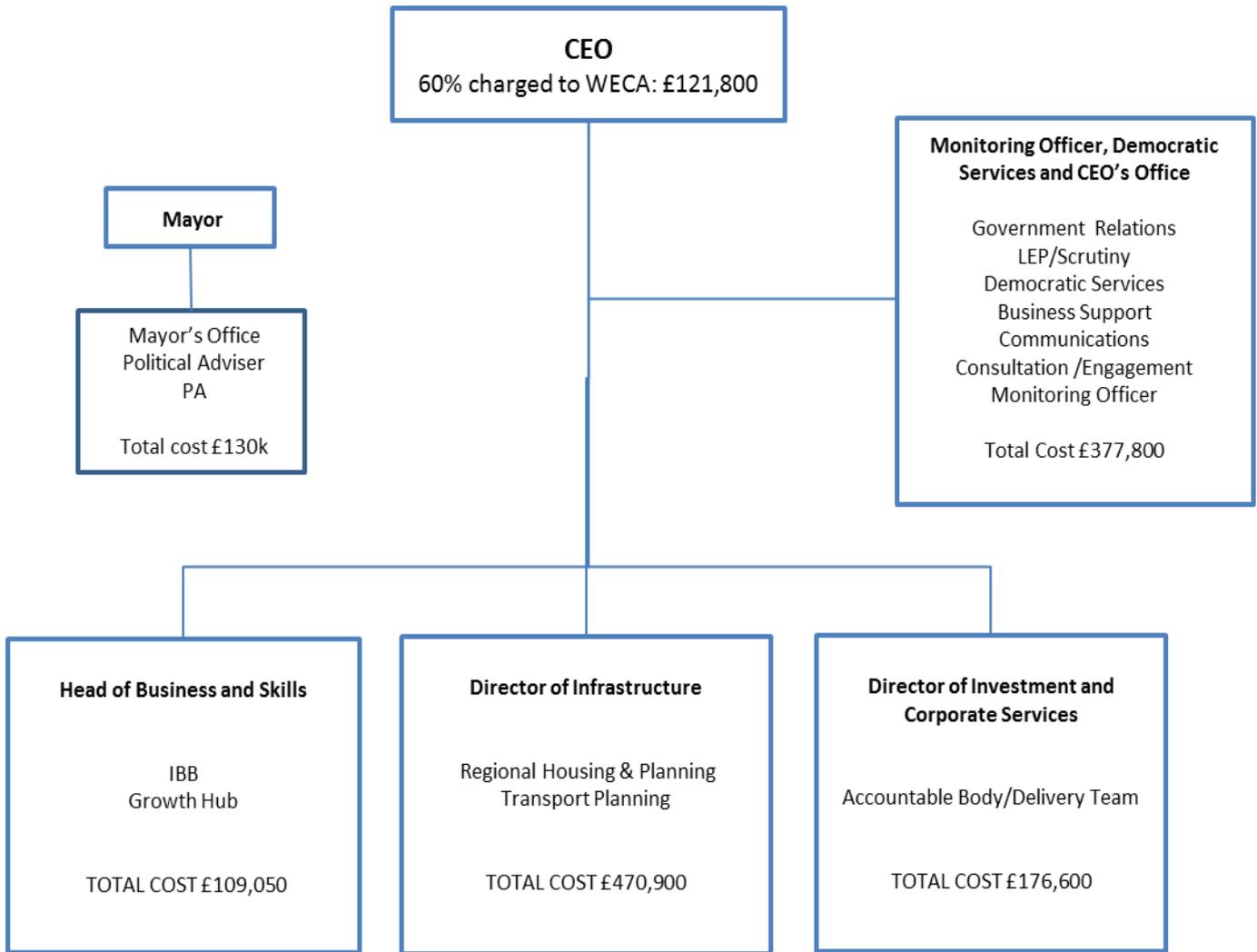
- There are significant additional funds now managed by WECA including the new £900M investment fund, highways and transport grants £18M per annum, transport functions £16M per annum and the Innovation Pilot £4M, Further additional funding streams are subject of ongoing discussions with government including a housing investment fund, housing deal and adult education budgets.
- There are significant opportunities to attract additional powers and funding to the region and these will require additional support to develop bids and business cases, working with colleagues in the local authorities.
- There is a need to enhance the democratic functions required to manage the new committees, advisory boards and scrutiny functions associated with running a publicly accountable authority.
- There is a need to develop the WECA communications function including the digital channels, to ensure transparency and support engagement and consultation activities. In addition, support is required to prepare briefings and presentations to support bids for funding and investment.
- Housing and planning resource is required to support ongoing work on the Housing Investment Fund, Housing Deal and JSP. In addition, WECA has been given new responsibilities including development of a Mayoral Spatial Plan and delivery of new planning powers and resource is required to support these.
- WECA needs to ensure adequate transport resource is available to meet its transport authority responsibilities including delivery of a local transport plan and the ongoing management of the of the integrated transport authority functions.

The following additional funding for staff posts (not included in the base budget set at the March 2018 WECA meeting – details are attached in annex 1) is required (all costs include employer pensions and national insurance costs:

- Director of Infrastructure = £115K
- Housing and Planning = £92K
- Adult Education = £52K
- Business and Skills = £36K
- Transport £26K
- Marketing and communications support = £32K
- **Total additional staffing budget = £353K**

Where possible, use will be made of resources available in constituent authorities where the people with the right skills can be released to support these activities, but the budgets will still be needed for WECA to pay the authorities for these staff.

WECA Staffing Structure and costs to WECA



Total Structure Cost £1,256,150