

Western Gateway Sub-national Transport Body

Board Meeting

Paper B

Date	10th July 2024
Title of report:	Strategic Investment Plan proposal
Purpose of report:	To propose an outline programme and approach to developing a Strategic Investment Plan for the Western Gateway Sub-national Transport Body

Recommendations:

The members of the Board are recommended to:

- I. Confirm approval of the finalised Strategic Transport Plan (STP)
- II. Agree the outline programme for delivery of the Strategic Investment Plan (SIP)
- III. Agree the objectives for the SIP, against which proposals submitted will be measured
- IV. Approve the allocation of £145,000 in 2024/25 for completion of the SIP
- V. Delegate responsibility for day to day programme and budget management of the SIP to a Project Board.
- VI. Nominate a member to act as Project Executive on the SIP Board.

1. Background

- 1.1 The long term (2024-2050) Strategic Transport Plan was approved by the Board in March 2024, pending minor changes delegated to the STP Project Board for completion. These changes were completed and circulated to the wider STP Board in April 2024. As required by the constitution, we now request Members to re-confirm approval of the finalised STP.
- 1.2 It was agreed at the Board meeting in Dec 2023 that the development of a Strategic Investment Plan to support delivery of the STP would be undertaken as a separate project, following the approval of the STP. This paper sets out our proposed plan for delivering this in 2024/25.
- 1.3 The DfT funding allocation letter for 2024/25 makes clear that the Department considers these activities to be our "...two primary roles: *building and maintaining a transport strategy and using this to provide Government with advice on prioritising investment.*" The SIP fulfils this second requirement.

2. Proposed overall approach

- 2.1 The overall purpose of the SIP is two-fold:
- 1) Identify the schemes and proposals that can best achieve the aims and objectives for the Western Gateway region (as specified in the STP)
 - 2) Provide a list of prioritised investment proposals for the region (e.g. to DfT or for funding opportunities)
- 2.2 The scope of the SIP is therefore focused on proposals that are significant to the region as a whole. It will not consider or “rank” purely local schemes and should not be viewed as an over-arching value judgment of any particular proposal.
- 2.3 In general terms, the approach is as follows:
- 1) WGSTB develops an assessment methodology for proposals (based on the STP objectives) and a proforma for submission
 - 2) Partners (which may include statutory bodies, industry and others, as well as Local Authority partners) submit proposals for assessment, along with supporting information.
 - 3) WGSTB assesses the proposals submitted against the objectives identified. Top scoring proposals are identified and compiled into a draft SIP.
 - 4) Consultants conduct Strategic Environmental Assessment, Equalities Impact Assessment and Health Impact Assessment of prioritised schemes.
 - 5) Highways impacts of prioritised schemes are modelled
 - 6) Public consultation on draft SIP, along with impact assessments
 - 7) Consultation responses, impact assessments and other feedback are compiled and the SIP re-drafted in response
 - 8) Final draft SIP is submitted to the Board for approval and published.
 - 9) Rolling programme of assessment is established to allow new proposals to be brought forward and the SIP refreshed at regular intervals.
- 2.4 The SIP will be delivered between now and April/May 2025. A full outline programme can be seen in Appendix 1.

3. Assessment methodology

- 3.1 The proposed assessment methodology comprises four main elements:
- 1) Regional sift. This uses seven criteria (agreed in the STP) to separate proposals with significant regional impact (in scope for the SIP) from those with mainly local impact (out of scope).
 - 2) Multi-criteria assessment against a set of objectives drawn from the STP. This is the heart of the assessment.
 - 3) High level deliverability assessment
 - 4) External assessment of environmental, equalities and health impacts of the prioritised schemes

3.2 The seven criteria* to determine schemes with regional significance (in scope for SIP) are those which:

- 1) Have significant impact beyond local boundaries
- 2) Require cross-boundary cooperation and/or delivery
- 3) Improve access to regionally or nationally significant destinations
- 4) Improve access to national or international gateways
- 5) Overcome a severance or connectivity issue that unlocks regional benefits or resilience
- 6) Facilitate strategic movement between the Midlands and the South Coast
- 7) Increase efficiency, sustainability and/or reliability of essential goods movements along strategic routes

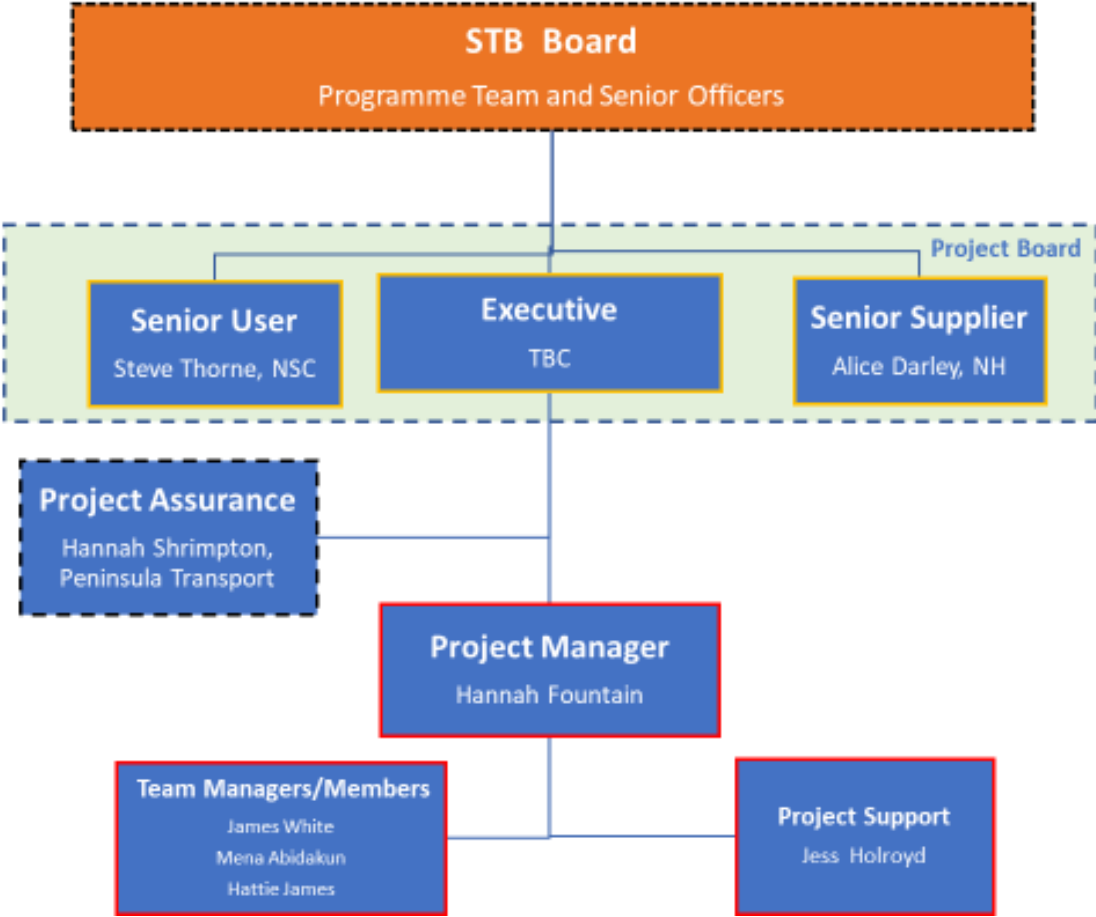
*At least one of these must apply.

3.3 The proposed objectives for the multi-criteria assessment are as follows:

Sustainable Growth and economy	1.Support the economy to thrive and level up across the whole region, particularly where prosperity is constrained by poor connectivity
	2.Facilitate sustainable visitor access to our key tourism areas
	3.Maintain and improve sustainable access for goods and people to national and international gateways,
Decarbonisation and Air Quality	4.Reduce annual regional transport carbon emissions from 6,250kt CO ₂ e (2019) to net zero by 2050
	5.Minimise embodied carbon
	6.Deliver the infrastructure/conditions/services necessary to prioritise a shift to low carbon modes
Access to services and opportunities	7.Improve access to essential goods, services and opportunities in target areas
	8. Maintain and improve access to important regional and national destinations through our strategic transport networks
Facilitates strategic N-S movements	9.Improve north-south rail and road links between the Midlands and South Coast on identified corridors/routes delivering social and economic benefits & levelling up southern parts of the region
	10.Improve journey time reliability on strategic routes (identified in STP)
Movement of Goods	11.Increase ability for goods moved by road to shift to rail or coastal shipping
	12.Improve HGV facilities on strategic freight routes to increase attractiveness, discouraging running on unsuitable alternatives.

4. Consultation, communication and engagement

- 4.1 The development of the SIP methodology has been informed by a series of workshops and meetings with partners including Local Authority senior officers, transport officers and data officers, National Highways and Network Rail. These groups will continue to be engaged as the SIP progresses.
- 4.2 The SIP process and methodology has also been informed by consultation with other STBs who either have or are developing SIPs of their own, including:
 Completed SIPs: Transport for the North, Transport for the South East, Midlands Connect, England’s Economic Heartland
 In development: Peninsula Transport, Transport East
- 4.3 Technical consultation on the scope of environmental assessment will be undertaken with statutory environmental bodies (Environment Agency, Natural England, Historic England) and National Landscapes in the region.
- 4.4 Public consultation on the draft SIP (including impact assessment reports) will take place in December and January.
- 4.5 It is proposed that the development of the SIP be overseen by a Project Board mirroring that successfully established for the STP. This Board will meet regularly (approx. fortnightly), with delegated authority to direct the project delivery and spend.



4. Equalities Implications

- 4.1 It is proposed that an Equalities Impact Assessment and a Health Impact Assessment is undertaken on the SIP to identify any potential disadvantages to protected groups or impacts on community health and safety.

5. Legal Considerations

- 5.1 The Western Gateway STB remains an informal non-statutory partnership and the STP and SIP are not statutory plans. They are therefore not subject to specific directives regarding sustainability appraisal. We have received advice from DfT that no specific appraisal methodology is expected, but a proportionate approach to be established in consultation with LA partners.

6. Financial considerations

- 6.1 The estimated cost of the SIP development is £145,000. We request approval for this amount to be allocated in the 2024/25 budget. The SIP will need to be kept regularly updated, so there will need to be an ongoing annual allocation for reviewing new schemes in future years.

7. Conclusion

- 7.1 The Board is asked to agree the recommendations set out at the beginning of this report.

Appendix 1: Outline programme

Contact Officer

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Appendix 1: Outline Programme

Time	Stage	Components	Consultation/approvals
June – July 2024	Develop assessment process	<ul style="list-style-type: none"> - Metrics - Methodology - Inputs - Submission proforma Review other STBs approaches Identify consultant support/specialist info required	SOG, TOG, Project Board *July Board: approval of process and programme WECA: Procurement approval – SEA, other
August '24	Options generation	<ul style="list-style-type: none"> - External proposals from partners - Internal Data collection for assessments Commission consultants for SEA	Partners to supply proposals and data
Sept – Oct '24	Options assessment	Run MCA Develop consultation and comms plan Outputs: Initial draft list of schemes + rationale. Comms Plan.	SOG, TOG, Project Board Oct Board: Update - List of proposals and early partial assessment results
Oct – Nov '24	Impact Assessments Modelling Draft SIP	<ul style="list-style-type: none"> - Carbon and transport modelling of SIP - Impact assessments (SEA, EqIA, HIA) Review feedback and revise metrics, methodology as needed. Incorporate early results of Impact assessments. Draft SIP. Outputs: draft SIP for consultation. SEA, EqIA and HIA for consultation	Dec Board (bring forward?): Approve consultation drafts (SIP, SEA)
Dec '24 – Jan '25	Public consultation		Public, LAs, Businesses, Universities and colleges
Feb '25	Review and re-draft	Summarise and assimilate: <ul style="list-style-type: none"> - Consultation responses and feedback - Impact assessment outputs - Modelling outputs 	SOG, TOG, Project Board. Reponses to consultees.
March – April'25	Final drafting and doc production	Revise drafts as necessary to produce final draft SIP Graphic design – final doc production* *NB: This will only be completed after year end.	March Board: Final draft approval. Project Board: final doc approval (April/May)

