
Saturday, 24 September 2022

To: Members of the MCA - Enhanced Partnership Board and Appropriate Officers

NOTICE OF MEETING

You are hereby summoned to a meeting of the South Yorkshire Mayoral Combined Authority to be held at **South Yorkshire MCA, 11 Broad Street West, Sheffield, S1 2BQ**, on: **Tuesday, 4 October 2022 at 2.00 pm** for the purpose of transacting the business set out in the agenda.



Martin Swales
Chief Executive and Head of Paid Service

Member Distribution

Mayor Oliver Coppard (Chair)
Pat Beijer
Dawn Badminton-Capps
John Dowie
Stephen Edwards
Ian Humphreys
Matt Kitchin
Andrew McGuinness
Councillor Chris Read

South Yorkshire Mayoral Combined Authority
SYMCA Executive Team
Public Bus Users
SYMCA Executive Team
SYMCA Executive Team
First Yorkshire
Stagecoach Yorkshire
CPT
Rotherham MBC

MCA - Enhanced Partnership Board

Tuesday, 4 October 2022 at 2.00 pm

Venue: South Yorkshire MCA, 11 Broad Street West, Sheffield, S1 2BQ



Agenda

Agenda Ref No	Subject	Lead	Page
1.	Chair's Welcome and Introductions	Chair	
2.	Minutes & Actions of the Previous Meeting	Chair	5 - 16
3.	Enhanced Partnership Operating Group Progress Report	Tim Taylor	17 - 22
4.	Operator Plans for Bus Recovery Grant and Short-Medium Term Service Changes (Verbal)	Matt Kitchin Ian Humphries	
5.	Towards a Patronage Recovery Action Plan	Pat Beijer	23 - 30
6.	Data Plan - Exchange & Analysis	Jonathan Guest	31 - 40
7.	Notice of Enhanced Partnership Scheme Variation	Pat Beijer	41 - 66
8.	Enhanced Partnership Forum - First Meeting Feedback (Verbal)	Dawn Badminton-Capps	
9.	Enhanced Partnership Scheme Progress Report	Pat Beijer	67 - 72
10.	Matters Arising	Chair	

Date of next meeting: Tuesday, 29 November 2022 at 2.00 pm
At: South Yorkshire MCA, 11 Broad Street West, Sheffield, S1 2BQ

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MCA - ENHANCED PARTNERSHIP BOARD

MINUTES OF THE MEETING HELD ON:

TUESDAY, 9 AUGUST 2022 AT 2.00 PM

**SOUTH YORKSHIRE MCA, 11 BROAD STREET WEST,
SHEFFIELD, S1 2BQ**



PRESENT:

Mayor Oliver Coppard (Chair)	South Yorkshire Mayoral Combined Authority
Councillor Chris Read	Rotherham MBC
Pat Beijer	Director of Public Transport Development (SYMCA)
Kevin Belfield	Commercial Director, First South Yorkshire
Stephen Edwards	Corporate Director of Public Transport (SYMCA)
Matt Kitchin	Managing Director, Stagecoach Yorkshire
Andrew McGuinness	CPT

IN ATTENDANCE:

Gabriella Kocsis	Minute Taker (SYMCA)
Sarah Pugh	Minute Taker (SYMCA)
Tim Taylor	Director of Public Transport Operations (SYMCA)

APOLOGIES:

Dawn Badminton-Capps	Bus Users UK
Nigel Eggleton	Managing Director, First South Yorkshire

9 Chair's Welcome and Introductions

The Mayor welcomed all to the meeting and invited attendees to introduce themselves.

Apologies were noted as above.

The Mayor suggested that the agenda be amended to allow item 7, EP Targets Report to be taken first to allow as much discussion as possible. Members agreed to the change of order.

10 Minutes & actions of the previous meeting

RESOLVED that the minutes were agreed to be a true and accurate record of the meeting.

RESOLVED that open actions were noted and those completed were signed off by members.

EP Targets Report

The Enhanced Partnership Plan suggested targets for 2024/5 as follows:

- 77 million passenger journeys per annum
- 99.5% reliability
- 4% reduction in journey times on corridors where interventions are planned
- 92% average passenger satisfaction.

In addition, the suggested monitoring programme included the following indicators:

- Punctuality
- The proportion of the bus fleet that is zero emission (starting from a baseline of 0%)
- A value for money tracker of the average daily and weekly fare across South Yorkshire.

As part of the regular reporting cycle, a dashboard showing progress against these targets and indicators was prepared. This paper summarised the key issues arising and any actions to be considered by the Board.

ACTION: Members to share their views on the appearance and content of the dashboard with the Director of Public Transport Operations.

A discussion was had around the targets for 2024/5. Mayor Coppard noted that he felt that these targets would not be achieved due to the challenges facing buses in South Yorkshire. Members discussed whether the target should be a hard number or if a percentage of modal travel would better demonstrate the shift in travel choices.

ACTION: M Kitchin and K Belfield to report back to the Board with a projected bus patronage figure following the service cuts in October.

Members noted the difficulty in recruiting and retaining bus drivers. K Belfield noted that First's shortfall at the Olive Grove depot was 72 drivers. This was a national problem with 7-8% shortfall nationwide. This shortage was attributed to a change in priorities relating to employee work/life balance.

A discussion took place around reasons for reduced bus patronage, such as working from home, continuing safety and wellbeing concerns and the recent effects of extreme weather on travel patterns. Possible recovery options were considered, including: encouraging more events in the local area to stimulate demand; reviewing the cost of car parking in relation to bus fares; and working with local business to provide extras to ticket holders (retailer discounts, vouchers, etc.).

ACTION: Officers to collate the information on the reasons for reduced bus patronage and possible recovery options for members to decide on during the next meeting in October.

Members discussed the wide range of data currently available on both users and non-users of public transport and discussed whether the best use is being

made of it to understand current and potential travel demand. Members also considered how existing data could be shared between bus operators and the MCA to help with decision-making.

ACTION: SYMCA to share economic intelligence on travel patterns with bus operators.

Members noted that currently there was little data on passengers and their end travel goals. It was suggested that the Development Group could work on this. Members were informed that there is a company in Sheffield (The Flow) who focus on this area.

The Board considered potential passenger groups who could use the bus more frequently if the service was improved. Members also shared their concern that usage by holders of the elderly concession pass was still significantly below pre-COVID levels, and the ways in which greater use could be encouraged.

ACTION: EP Development Group to create a piece of work which explores better data in terms of travel flows and public movement.

ACTION: Democratic Services Officer to add 'EP Targets Report' onto the November agenda for members to review the targets following the impact of the changes to be made in October.

RESOLVED that the Board:

1. Note the contents of this paper in relation to the delivery of the Enhanced Partnership targets and indicators
2. Provide feedback on the format and approach to the Dashboard
3. Note any expectations on Board members to provide support and decision making where their contribution is required to deliver the targets agreed.

12 **Progress with EP Scheme**

The South Yorkshire Enhanced Partnership Plan and Scheme was approved by the MCA in March 2022 and commenced on 1 April 2022. The Board agreed to allow a variation of the Enhanced Partnership Scheme (EPS) in June 2022, driven by further information about funding and delivery.

This paper summarised the progress made in delivering the components of the Scheme, upcoming milestones, risks and issues and any actions to be considered by the Board.

Section 2 of the paper was discussed, and members agreed that it would be helpful to articulate the benefits of the key changes in EPS delivery more clearly to South Yorkshire residents.

RESOLVED that the Board note the contents of this paper in relation to the progress with the Enhanced Partnership Scheme and agree to provide support when required.

New EP Schemes Proposed Priorities

Based on Government guidance at the time, the current EPS only included elements for which funding was already known and committed at the time of its preparation in November 2021. Once more information was available on future central and devolved funding for bus improvements, the intention was to develop further Enhanced Partnership Schemes. This paper summarised the start of this process for early input from the Board.

Out of 40 priorities activities considered, 7 were already included in the current EPS, and 6 were in development with funding being sought through the Levelling Up Fund. There were 27 remaining activities that could form part of future EPS's.

A discussion was held amongst members on the activities listed in Appendix A. It was agreed that some were open to interpretation and could be further refined to identify more specific interventions.

Cllr Read mentioned the gap in activity between October 2022 and March 2024, as demonstrated in Section 2.1, and stressed the need for some action in this timeframe.

ACTION: Officers to look at which of these priorities could be delivered in the next 4-6 months and prepare a paper with suggestions to be agreed on at the October meeting.

It was agreed that 3 priorities (ref 6, 7 and 22 as on Appendix A) could be delivered together as one project to provide consistent presentation of all relevant tickets and travel information with consistent branding regardless of the underlying provider.

ACTION: Officers to further investigate and plan this work prior to the next meeting for members to comment on.

It was also suggested that work could be undertaken with local retailers to allow for bus customers to have access to discounts with a valid ticket. The Director of Public Transport Development and the Director of Public Transport Operations advised members that some initial thinking was underway on this and that they had already met with a potential provider. It was agreed that contributions to this work from the LEP would be helpful.

ACTION: P Beijer and T Taylor to follow up on their meeting with the provider and commence research into similar providers.

ACTION: Officers to engage with L Nickson and the LEP about retailer discounts for bus users.

RESOLVED that the Board note the contents of this paper and provide a steer as to what activities it would prefer to see in future Enhanced Partnership Schemes.

14 **Approval of Variations to EP Schemes**

The Board discussed the Forum Membership Proposal which needed to be established no later than 30 September 2022 to support the creation of the Customer Charter. Given the importance of the work and the need to formally constitute the Forum it was felt that the original deadline should be reviewed. The Board was asked to approve a variation: either of the implementation date or to adapt the language to suggest 'draft'.

ACTION: P Beijer to consider which variation option is best suited and prepare the EP Scheme Variation for EP Board approval in correspondence.

RESOLVED that the Board approved the variation to the EP Scheme.

15 **Forum Membership Proposal**

The MCA Board met on 21 March 2022 and agreed as part of the Enhanced Partnership (EP) arrangements to be implemented from 1 April 2022, an EP Forum would be set up to provide customer representation. Membership of the EP Forum was considered at the first EP Board meeting and the Board determined that Forum membership should be broadened to ensure the wider South Yorkshire community would be represented. This had resulted in a list of 28 representatives (Appendix A) to make up the Forum, which must be established no later than 30 September 2022.

Concerns were raised during the writing of the paper about how functional a forum could be with so many members, so three sub-groups which would meet separately every 6 months were suggested.

A discussion was had around the need for further thought to be given to the timings of the meetings.

ACTION: Officers to work through a timeline of key dates that may affect the timings of Forum meetings.

RESOLVED that the Board approve the EP Forum membership representation as set out in Appendix A and consider the proposed thematic meetings as discussed in Section 2 and set out in Appendix B.

16 **Notification of matters of bus operator confidentiality for meeting records**

This part of the meeting was not minuted due to the consideration of confidential information.

17 **Matters arising**

Members were reminded that it was 'Catch the Bus Month' in September.

The possibility of using the Adult Education Budget to uplift driver shortages was discussed in reference to a case study in West Yorkshire.

ACTION: Officers to discuss with AEB colleagues and bring an update to the next meeting in October.

I, the undersigned, confirm that this is a true and accurate record of the meeting.

Signed

Name

Position

Date

Open and Recently Completed Actions

Meeting Date	Minute No	Action	Action Owner	Update	Status
21/06/2022	8	<p>Any other business</p> <p>SY Mayor to put his name to a letter asking for formal feedback and highlight his disappointment that we missed out on BSIP funding.</p>	South Yorkshire Mayor/Head of Mayor's Office		Ongoing
09/08/2022	11	<p>EP Targets Report</p> <p>Members to share their views on the appearance and content of the dashboard with the Director of Public Transport Operations.</p>	All members	Feedback awaiting.	Ongoing
09/08/2022	11	<p>EP Targets Report</p> <p>M Kitchin and K Belfield to report back to the Board with a projected bus patronage figure following the service cuts in October.</p>	M Kitchin and K Belfield	Covered under item 4 on the agenda of 4 October (Recovery Action Plan (Oct 2022 – Mar 2023))	Complete
09/08/2022	11	<p>EP Targets Report</p> <p>Officers to collate the information on the reasons for reduced bus patronage and possible recovery options for members to decide on during the next meeting in October.</p>	S Edwards, P Beijer and T Taylor	Covered under item 5 on the agenda of 4 October (Data and Intelligence Plan)	Complete
09/08/2022	11	<p>EP Targets Report</p>	S Edwards, P Beijer and T Taylor	Covered under item 6 on the agenda of 4	Complete

Meeting Date	Minute No	Action	Action Owner	Update	Status
		SYMCA to share economic intelligence on travel patterns with bus operators.		October (Data and Intelligence Plan)	
09/08/2022	11	EP Targets Report EP Development Group to create a piece of work which explores better data in terms of travel flows and public movement.	P Beijer to inform EP Development Group	Covered under item 6 on the agenda of 4 October (Data and Intelligence Plan)	Complete
09/08/2022	11	EP Targets Report Democratic Services Officer to add 'EP Targets Report' onto the November agenda for members to review the targets following the impact of the changes to be made in October.	G Kocsis	Added to the agenda.	Complete
09/08/2022	13	New EP Schemes Proposed Priorities Officers to look at which of these priorities could be delivered in the next 4-6 months and prepare a paper with suggestions to be agreed on at the October meeting.	S Edwards, P Beijer and T Taylor	Covered under item 5 on the agenda of 4 October (Data and Intelligence Plan)	Complete
09/08/2022	13	New EP Schemes Proposed Priorities Officers to further investigate and plan this work prior to the next meeting for members to comment on.	S Edwards, P Beijer and T Taylor	Covered under item 5 on the agenda of 4 October (Data and Intelligence Plan)	Complete
09/08/2022	13	New EP Schemes Proposed Priorities P Beijer and T Taylor to follow up on their meeting with the provider and commence research into similar providers.	P Beijer and T Taylor	PB followed up with supplier of retail discount app linked to bus usage. Included and to be considered as part of action plan (item 5 on agenda)	Complete

Meeting Date	Minute No	Action	Action Owner	Update	Status
09/08/2022	13	<p>New EP Schemes Proposed Priorities</p> <p>Officers to engage with L Nickson and the LEP about retailer discounts for bus users.</p>	S Edwards, P Beijer and T Taylor	In progress – to be carried forward following action plan feedback (item 5 on agenda)	Ongoing
09/08/2022	14	<p>Approval of Variations to EP Schemes</p> <p>P Beijer to consider which variation option is best suited and prepare the EP Scheme Variation for EP Board approval in correspondence.</p>	P Beijer	Proposed EP Scheme Variation circulated to EP Board members on 15 September 2022 for approval by 30 September 2022. Covered under item 7 on the agenda of 4 October 2022.	Complete
09/08/2022	15	<p>Forum Membership Proposal</p> <p>Officers to work through a timeline of key dates that may affect the timings of Forum meetings.</p>	S Edwards, P Beijer and T Taylor	Forum meetings now planned. Decision to hold single Forum meeting, instead of staggered thematic Forum meetings has resolved the risk of not all relevant topics being considered by all members of the Forum.	Complete
09/08/2022	17	<p>Matters arising</p> <p>The possibility of using the Adult Education Budget to uplift driver shortages was discussed in reference to a case study in West Yorkshire.</p>	S Edwards, P Beijer and T Taylor	Discussions held with AEB colleagues, now awaiting operator feedback. Raised with operators at EP Operating Group on 15	Complete

Meeting Date	Minute No	Action	Action Owner	Update	Status
		Officers to discuss with AEB colleagues and bring an update to the next meeting in October.		September. Operators were unanimous that they'd welcome additional investment/activity on driver training akin to the scheme in West Yorkshire. We now need to develop, with SYMCA AEB colleagues what this might look like	

Completed Actions

Meeting Date	Minute No	Action	Action Owner	Update	Status
21/06/2022	4	Amend Part 1 of the EP Board ToR to include a Statement of Intent.	Pat Beijer	Updated EP Board ToR attached here with (V2.1 dated 07/07/22)	Signed off by the Board on the 9 th August.
21/06/2022	4	Item 10 of the EP Board ToR to be amended so the Board is transparent, and all papers will be published unless they feature sensitive information.	Pat Beijer	Updated in EP Board ToR attached here with (V2.1 dated 07/07/22)	Signed off by the Board on the 9 th August.
21/06/2022	5	Members to correspond with P Beijer via email and inform her of their suggestions for EP Forum members so a solid list can be brought together and discussed at the next meeting.	All members	Suggestions were received and discussions held between P Beijer & Dawn Badminton-Capps to create a finalised list	Signed off by the Board on the 9 th August.
21/06/2022	5	Remove bi-monthly and include 'every other month' in the ToR for both the EP Forum and EP Board.	Pat Beijer	Updated EP Board and EP Forum ToRs attached	Signed off by the Board on the 9 th August.
21/06/2022	5	Add a statement of intent for the EP Forum to the Terms of Reference.	Pat Beijer	Updated EP Forum ToR attached (V2.0 dated 07/07/22)	Signed off by the Board on the 9 th August.
21/06/2022	5	The Mayor asked to remove reference to 'customers' and instead use the 'travelling public of South Yorkshire', whether they are current customers or not. EP Board ToR to be looked at and updated with this in mind.	Pat Beijer	Updated EP Board ToR V2.1	Signed off by the Board on the 9 th August.
21/06/2022	7	Feedback from the EP Forum and review of commercially sensitive papers to be added to the standing agenda.	Pat Beijer	Added as requested	Signed off by the Board on the 9 th August.

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ENHANCED PARTNERSHIP BOARD

04 OCTOBER 2022

Item 03 - EP Operating Group Progress Report October 2022

Executive Summary

This report provides the Enhanced Partnership Board with an update on activities at the Enhanced Partnership (EP) Operations Group. It provides details on how the group has now been established, how the group proposes to identify and escalate points of concern to both the EP Board and the EP Development Group.

It also provides details on the latest position (at time of writing) on the implications of the extension of Bus Recovery Grant (BRG) funding to April 2023, changes to the bus network in October 2022 and a future look on what a sustainable network might look like when BRG funding ends.

What does this mean for businesses, people and places in South Yorkshire?

An effective Bus Enhanced Partnership is essential to ensuring that democratically accountable authorities have a say in the way our buses currently operate in South Yorkshire. The role of the EP Operations Group is to provide a consistent means of identifying areas of concern on the network and putting forward requests and recommendations to the Board as to how to resolve these, ultimately resulting in a better bus service.

Recommendations

Note the contents of the report and recommend any actions necessary back to the EP Operations Group for consideration.

Consideration by any other Board, Committee, Assurance or Advisory Panel

Enhanced Partnership Development Group 07 September 2022

1. Background

- 1.1 As part of the wider EP governance arrangements the EP Operations Group provides a consistent means of identifying areas of concern on the network and putting forward requests and recommendations to the Board as to how to resolve

these. This group, which meets monthly, has membership from SYMCA and Local Authority officers and bus operator representatives.

- 1.2 The EP Operations Group has now met three times and are starting to formulate a consistent means of monitoring and identifying issues and areas of concern on the bus network. This builds upon previous work undertaken by the district level Voluntary Bus Partnership Group meetings which operated from 2012 to 2021.
- 1.3 The EP Operations Group typically review operational network performance (punctuality, reliability, journey time and customer satisfaction) and use this as a basis to identify changes or interventions which are thought to be beneficial to improving overall network performance. Where an intervention is thought to be necessary, this is highlighted to the EP Development Group for consideration. In turn, and where appropriate, these will then be taken to a Future EP Board for approval.
- 1.4 The EP Operations Group will also ensure that the quarterly Performance Dashboard coming to EP Board is timely, accurate and adequately highlights performance issues (or indeed good practice) for noting by EP Board.

2. Key Issues

- 2.1 Since its establishment, the EP Operations Group has initially focussed on ensuring that the necessary informal governance and structures were in place and that the group was satisfied that membership, standing agenda items and resourcing of the outputs and actions is fit for purpose.
- 2.2 A discussion and a subsequent paper on how best to escalate matters to this Board was considered. EP Operations Group propose that any areas of concern on the bus network are initially flagged to the EP Development Group (through a brief proforma) and then highlighted in both the quarterly Performance Dashboard narrative and also future iterations of this paper. We welcome Board's views on this proposal given it is appropriate for them to be made aware of only significant and strategic operational interventions proposed.
- 2.3 The EP Operations Group also requested that the previously established "Hotspots Groups" be reinstated. These groups, focused at Local Authority level, are a mechanism to allow small scale issues on the highway and bus network to be identified and be rectified. These typically are matters such as kerb re-alignment, changes to parking or waiting restrictions on the highway, traffic light changes or changes to bus stop infrastructure to improve the efficiency of bus movements. Funding for these interventions is typically achieved either through local highway budget or Local and Neighbourhood Complementary Transport Programme annual funding allocation through the CRSTS settlement (£9.9m over 5 years starting in 2022/23).

The hotspots groups will also provide a means to identify more substantial capital interventions which might require a formal project to be undertaken and a defined allocation created in current or future year capital programme. These will initially be considered by the EP Development Group and brought to this EP Board as required.

2.4 As EP Board members are hopefully already aware, DfT funding to support bus service recovery has been in place in various forms since March 2020. The latest round of funding of Bus Recovery Grant was due to end on 4 October 2022, but DfT announced an extension to this funding on 19 August for up to a further six months.

Whilst this funding extension is clearly welcome as it provides essential revenue support to bus operators, it doesn't entirely prevent and mitigate against the risk of service cuts in October or beyond.

Stagecoach is making some service reductions and amendments which are not viable during current funding extension.

Furthermore, whilst BRG is available for operators to claim from October 2022, First South Yorkshire have taken the decision that it is in their commercial interests not to claim BRG from this point onward, and instead implement their residual commercial network only, with any further services to be retained through tendered service buy back.

Discussions have been held with DfT to route BRG funding which would have been paid to First South Yorkshire directly to SYMCA to supplement its tendered services budget. In addition, some additional costs are likely to be incurred through changes to the Stagecoach network even with them claiming BRG.

At the time of writing, SYMCA officers are working through the implications of this on the network and what this means in terms of level of service provision from October, and beyond, relative to available funding.

2.5 As outlined in 2.4 above, even with the continuation of BRG funding, there remains a gap between the costs of maintaining services and the available budget.

However, the cost of maintaining the majority of the network (based on submitted tenders in August) is around £2.8m for per quarter relative to an assumed additional income of £1.8m.

2.6 SYMCA is placing additional tenders to secure at risk services, where possible, through to the end of the funding period (March 2023). Whilst this will protect the scope of services provided there will still be some service reductions.

2.7 Options to fund the gap between available funding and the cost of additional tenders are being developed. Given the difference between operators in the areas of operation and the approach taken to funding the impact across the network is not even and hence the scale of new tenders varies across the Region. The quarterly cost of the additional services, split by local authority area, are shown below.

	2022	2023
	Q3 (Oct-Dec)	Q4 (Jan-Mar)
Barnsley	£30,000	£30,000
Doncaster	£720,000	£720,000
Rotherham	£730,000	£730,000
Sheffield	£1,320,000	£1,320,000
Total	£2,800,000	£2,800,000

- 2.8 At the EP Operations Group in August, the group discussed commitments already included in the EP on timing of service change dates and annual fare changes.

The group have agreed in principle that the two significant service changes take place at the start of September (or late August) on the last Sunday prior to school returning for the start of the academic year, and on the first Sunday after the Good Friday/Easter Monday weekend. Whilst the precise dates will undoubtedly change each year, it will become familiar with passengers as to when to expect any significant timetable alterations and therefore be more predictable for them and for our communication activity with passengers to follow this timeline.

Board members should note that this does not include other more minor temporary seasonal service changes (linked to Christmas, New Year and school holidays).

On the issue of annual price changes, operators indicated that under normal circumstances they would be looking to agree a fare rise in early January 2023. This is typically timed to coordinate with the regional ticketing company (TravelMaster) fare rise which also takes place each January in turn to coincide with the annual rail fare rises which take place (as some TravelMaster products contain a rail component).

This issue will need to be considered as part of the wider work on ticketing and fares under consideration.

- 2.9 Finally, Board should note that at the most recent EP Operations Group, a discussion was held regarding contribution from partners to an annual EP Marketing Budget.

Whilst there is remaining budget available from the voluntary partnership which will sustain to March 2023, Local Authority partners with the exception of Doncaster were unable to commit to future contribution of marketing expenditure from April 2023.

Bus operators and SYMCA both confirmed that they were able to continue to contribute to future years budget, however the lack of wider contribution from local authority partners is of concern.

3. Options Considered and Recommended Proposal

3.1 Option 1

EP Board consider the points presented in this paper and share their views on the points raised, and in particular the implications from the changing position on bus recovery funding and what this means in terms of future network stability.

- 3.2 Board is also asked to support the proposals set out in 2.8 in respect of consistent service change dates twice per year and a fixed price rise date once per year, as set out in the agreement underpinned by the Enhanced Partnership agreement to which participants are signed up to.

3.3 Option 1 Risks and Mitigations

This option of itself does not present a specific risk; more so that the implications of future arrangements on continued levels of public subsidy on bus services will have

a direct impact on the shape and extent of future bus services in to 2023 and beyond.

3.4 Recommended Option
Option 1

4. Consultation on Proposal

4.1 Not applicable; this paper is primarily and update paper for EP Board members to be made aware of latest discussions and proposals set out by the EP Operations Group.

5. Timetable and Accountability for Implementing this Decision

5.1 Not applicable; this paper is primarily and update paper for EP Board members to be made aware of latest discussions and proposals set out by the EP Operations Group.

6. Financial and Procurement Implications and Advice

6.1 Not applicable; this paper is primarily and update paper for EP Board members to be made aware of latest discussions and proposals set out by the EP Operations Group.

7. Legal Implications and Advice

7.1 Not applicable; this paper is primarily and update paper for EP Board members to be made aware of latest discussions and proposals set out by the EP Operations Group.

8. Human Resources Implications and Advice

8.1 Not applicable.

9. Equality and Diversity Implications and Advice

9.1 Not applicable.

10. Climate Change Implications and Advice

10.1 Not applicable.

11. Information and Communication Technology Implications and Advice

11.1 Not applicable.

12. Communications and Marketing Implications and Advice

12.1 Not applicable.

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ENHANCED PARTNERSHIP BOARD

4 October 2022

Item 05 – Towards a Patronage Recovery Action Plan

Executive Summary

The South Yorkshire Enhanced Partnership Plan and Scheme was approved by the Mayoral Combined Authority in March 2022 and commenced on 1 April 2022. The Plan included a target for 77 million passengers by 2025/25, but the latest monitoring report, considered by the Board at the meeting in August 2022, allied to ongoing uncertainty over longer term bus network funding support, has meant that patronage recovery since the COVID-19 pandemic is slower than was anticipated.

This paper summarises a number of opportunities identified by the Enhanced Partnership Development Group, wider discussions with partners in the Enhanced Partnership for a Patronage Recovery Action Plan, to be considered by the Board.

What does this mean for businesses, people and places in South Yorkshire?

An effective and targeted demand recovery action plan focussed on recovery of demand in the bus network will support a more sustainable public transport network for the travelling public of South Yorkshire.

A well-connected and stable public transport network in turn, could protect and drive economic and social connectivity that supports the local economy and the welfare of the people of South Yorkshire.

Recommendations

It is recommended that the Board:

1. Notes the contents of this paper
2. Provides feedback on the suggestions for inclusion in a Patronage Recovery Action Plan
3. Provides support where this is required for any agreed activities.

1. Background

- 1.1 The South Yorkshire Enhanced Partnership Plan (EPP) and Scheme (EPS) was approved by the Mayoral Combined Authority in March 2022 and commenced on 1 April 2022. The EPP included a patronage target for 2024/25 of 77 million passengers per annum. This was based on a return to pre-COVID trend levels of patronage within the first two years of the EPS and a 4% increase in patronage over

the following two years, based on the predicted impacts of the components of the EPS as it stands.

Annual patronage levels in August 2022 were estimated at 55.6m. At the current 22m shortfall, we would need to generate and retain 0.75m additional passengers every month for the next 30 months to achieve the target.

- 1.2 The change in travel patterns resulting from the COVID-19 pandemic and the ongoing uncertainty over a longer term bus network funding support settlement and the impact that this would have on bus service levels, has meant that patronage recovery since April 2022 is slower than was anticipated. At the meeting in August 2022, the Board requested a review of activities that could be deployed within the next 6 months that could have a positive impact on the recent upward trend in patronage.
- 1.3 Government did not award Bus Service Improvement funding to South Yorkshire, which would have provided revenue support for improvements envisaged in the Enhanced Partnership Plan. However, SYMCA has secured £30.8m of capital funding from CRSTS for investment in bus improvements with specific spend areas defined as BSIP initiatives, Zero-emission buses (most already earmarked complimentary to the successful ZEBRA bid), real time detection and bus lane priority.

SYMCA also put a bid forward for the Levelling Up Fund, which could if successful, leverage further capital investment in retailing, customer information, further zero-emission buses and Demand Responsive Transport.

There is scope to deploy these capital funding sources to support shorter and longer term initiatives, subject to these initiatives meeting the grant conditions.

- 1.4 Since the 9 August 2022 Board meeting, a number of steps were taken to develop an action plan:
 - the EP Development Group met on 7 September and reviewed the priority activities in the Enhanced Partnership Plan to identify potential opportunities for a Patronage Recovery Action Plan;
 - on 9 September, a senior director level meeting took place between SYMCA and two major operators Stagecoach and First, with the operators agreeing to develop a more ambitious plan by early October, for presentation to the 29 November 2022 EP Board;
 - SYMCA concluded work on an integrated retailing strategy, identifying potential early wins within that;
 - SYMCA's data experts reviewed available information and data sharing opportunities, set out in a short, medium and longer term plan, with a focus on intelligence that could help inform and shape effective demand recovery initiatives (presented in a separate paper for consideration by this Board);
 - SYMCA also met with potential suppliers to identify potential opportunities and scope for inclusion in a demand recovery action plan:
 - Demand Responsive Transport technology
 - A retail discount app developer that could incentivise bus usage by offering targeted retailer discounts to bus users, and;
 - innovative research agencies (including Sheffield University) who could scenario test effectiveness of interventions through digitised process

simulation (e.g. punctuality of bus services resulting from a wider usage of SMART ticketing).

- 1.5 It should be noted that since the meeting in August, the Government has announced a £2 one-way trip fare cap for buses that will be in operation between 1 January and 31 March 2023:

<https://www.gov.uk/government/news/2-bus-fare-cap-across-england-to-save-passengers-money>

This is a positive step in reducing some of the cost barriers to using buses and offers an opportunity to encourage new and existing passengers to use the bus. Therefore, the deliberations and suggestions of the EP Development Group considered what could be done in addition to this new commitment.

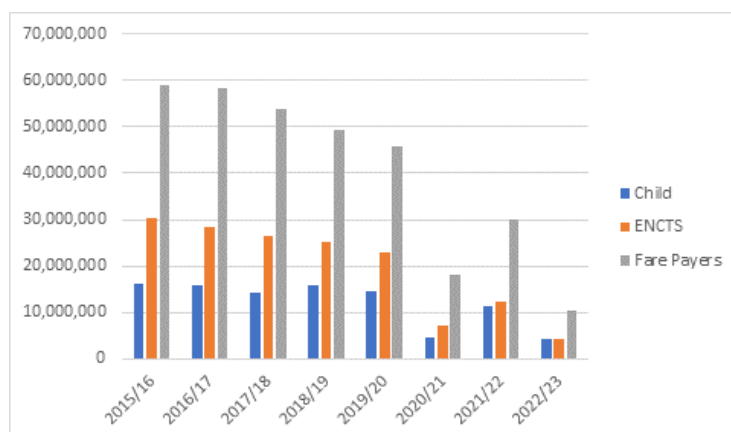
2. Potential Elements of a Patronage Recovery Action Plan

- 2.1 The various discussions focused on activities that can be implemented quickly and are likely to have an immediate impact on patronage. The EP Development Group also considered that trying to align any actions with the planned bus fare cap may also help enhance the positive image of buses and attract new passengers.

Recent customer panel research done during August and September 2022, shows that most important factors for customer satisfaction with bus services in order of priority are:

1. Turning up on time
2. Value for money
3. Journey time
4. Cleanliness and comfort on board
5. Friendly drivers

Other recent bus user data information shows a significant decline over time in bus usage (see figure below, with the 2022/23 figure representing the first 3 to 4 months of this year). As at 14 September 2022, the proportion of overall bus patronage to pre-Covid weekly is 77.5% and recovery rates by customer group show fare payers overall at 74.6%, ENCTS 62.5% and Child 90.5%.



The South Yorkshire Bus Review identified some causes of the disproportionate decline in ENCTS usage pre-Covid.

“Locally, patronage decline has been most significant among English National Concessionary Travel Scheme (ENCTS) pass holders. Between 2009/10 and 2018/19 ENCTS patronage declined by 31% and

has accounted for 47% of combined patronage decline (including fare paying, child and ENCTS passengers)."¹

"ENCTS decline has largely been driven by local and national changes to pass restrictions but also increased ownership of private vehicles by older people. ... In addition, the Government has not provided the necessary level of funding to transport authorities including SYPTTE to reflect the cost of concessionary travel, which has added to the financial burdens on SYPTTE and bus operators. Combined, this has created a significant exit from the bus network of passengers who have been using services which were on the cusp of viability."²

- 2.2 The following paragraphs set out the activities suggested for the Board to consider.
- 2.3 **Better and More Accurate Service Data** – passengers respond positively to accurate data about services, particularly at times of disruption. Operators and SYMCA have invested in improvements to apps and digital data in recent years and work is currently ongoing on improving TSY's web-based customer information tools. If the proposed bus fare cap promotes new users, there is the opportunity to promote apps and improved and seamless digital media as an effective and reliable way to get relevant travel information and give greater planning and travel assurance to less experienced travellers.
- 2.4 **Accessing Information** – one issue that has arisen is the volume of different sources and variety of information available on buses across South Yorkshire, meaning that passenger often default to Google or similar, where the information, particularly in terms of disruption, is not as accurate. The Development Group suggested investigating the provision of a QR code at each bus stop or 'touchpoint' with the bus network that would take a passenger directly to the relevant app of website for that location. This would still utilise existing apps and websites, but provide a single access point for the information, making it easier, particularly for new passengers.
- 2.5 **Bus Priority** – the Development Group acknowledged that there is a separate programme of bus priority measures within the EPS and that such infrastructure was likely to take longer than 6 months to deliver. However, an issue often raised by operators and passengers, is the abuse of current restrictions, such as parking in bus lanes, that has a negative impact on reliability. There is the potential to have a programme of increased enforcement of existing bus priority measures, which should help improve reliability at a time when new passengers are being encouraged.
- 2.6 **Bus Detection** – at a number of locations, there is already bus detection which allows additional priority to be given to late-running buses at traffic signals in an attempt to improve reliability. The Development Group thought that they may be merit in revising the criteria for detection, for example, moving from, say, 5 minutes late to 3 minutes late, to provide additional priority.

¹ *South Yorkshire Bus Review*. South Yorkshire MCA. Available at: <https://southyorkshire-ca.gov.uk/getmedia/2b2b8b2d-718d-485d-8c81-179535fbf335/Bus-Review-Report-June-2020.pdf> page 22 (bus operator data) (Accessed: 9 September 2022)

² *South Yorkshire Bus Review*. South Yorkshire MCA. Available at: <https://southyorkshire-ca.gov.uk/getmedia/2b2b8b2d-718d-485d-8c81-179535fbf335/Bus-Review-Report-June-2020.pdf> page 22 (bus operator data) (Accessed: 9 September 2022)

- 2.7 **Targeted Marketing** – the announcement of the £2 flat fare was welcome, but there is the opportunity to use this commitment to do some more targeted marketing in South Yorkshire, potentially linked to the cost-of-living crisis. For example, comparing the cost of travel by bus with the cost of travel by car for, say, a young family, may well help to underline the value of the bus and drive new demand. Leisure and weekend travel were seen as suitable areas to target too. Consideration was also given to the disproportionate slow post-Covid return of ENCTS users to the bus network, with potential causes linked to user confidence or reduced awareness of ENCTS pass eligibility following Covid. The causes will be further investigated to support a targeted effort to attract ENCTS users back to the network. A Communications Plan is being developed for the EPS and the Development Group considered that this opportunity should be factored into that plan.
- 2.8 **Seasonal Discounts** – the flat fare is due to start in January 2023, but the Development Group suggested that the Board consider the merits of introducing this earlier within South Yorkshire to capture the Christmas and New Year travel market. Often at this time of year, Local Authority parking charges are reduced or waived at certain times, but the Development Group suggested that it could be better to use any such funding to reduce public transport costs this year instead (or as well as).
- 2.9 **Price Differential** – non-users often perceive the bus to be a more expensive and inconvenient option. Allied to improvements in information and data provision, the Development Group thought that being more specific about the price differential between the flat fare and the cost of an alternative journey by car, would be useful within any marketing material. Although this approach had been considered before, the publicity around the £2 fare would provide a simpler comparison for most common journeys.
- 2.10 **'Tap and Cap'** – data is still awaited on the 'tap and cap' trial in Doncaster, but the Development Group felt that operators should consider if this can be introduced across South Yorkshire. An early region-wide introduction is not likely to be a multi-operator, multi-mode system that would be the ultimate aim, but it should help speed up boarding times and hence improve reliability, as well as being easier for passengers.
- 2.11 **Targeted bus service improvement areas** where there is local potential to grow market (to break cycle of decline and demonstrate what is possible), this could be informed by economic activity data and done on a trial basis or through Demand Responsive Transport piloting.
- 2.12 **Early wins on ticketing and fares**, including TravelMaster only periods, inter-operable tap and cap, upgrade to the TravelMaster app to enhance the travelling public perception of an integrated network (one stop shop) and flat fares around Sheffield and ticket pricing relative to TravelMaster.

3. Key Risks/Issues

- 3.1 At present, the trend for passenger numbers in the EPS is falling behind what is likely to achieve the target. Failure to act swiftly will make the task of achieving the target harder, and potentially miss the opportunity to complement the planned £2 flat fare cap in early 2023.

In parallel, medium to longer term opportunities should continue to be developed to ensure demand has the best chance of recovering in a sustainable way in the longer term.

4. Action(s) Required from Enhanced Partnership Board

- 4.1 The Board is invited to discuss the initial ideas, to provide feedback and to give senior level commitment to the suggested activities that could be included in a Demand Recovery Action Plan. This enables the EP Development and Operating Group to further work on outcomes, timescale and resource to help prioritise the potentially most impactful actions for progression and present a more detailed plan for endorsement at the meeting on 29 November 2022.

5. Financial and Procurement Implications and Advice

- 5.1 None as a result of this paper, although some of the activities may have financial implications if taken forward.

6. Legal Implications and Advice

- 6.1 None as a result of this paper.

7. Human Resources Implications and Advice

- 7.1 None as a result of this paper.

8. Equality and Diversity Implications and Advice

- 8.1 The EPP sets out the region's plans for improving accessibility across the bus network and on board our services and the EPS is the means by which these improvements will start to be delivered.

- 8.2 Under section 149 of the Equality Act 2010, in agreeing any actions relating to the EPP and the EPS, the Board should have due regard to the need to:

- i. Eliminate discrimination, harassment and victimisation;
- ii. Advance equality of opportunity between those who share a protected characteristic and persons who do not share it; and
- iii. foster good relations between those who share a protected characteristic and persons who do not share it.

9. Climate Change Implications and Advice

- 9.1 The EPP sets out the scale of change required to meet the region's net zero targets by 2035. At present the region does not have any zero emission buses and the EPP identifies the trajectory, costs and initial projects that could begin the transition from diesel to alternative fuels – some of these initial projects are included in the EPS.

- 9.2 Any increase in bus patronage will contribute to the long-term stability of the public transport network which is an essential element of the drive to meet the stated net zero targets.

10. Information and Communication Technology Implications and Advice

10.1 None as a result of this paper.

11. Communications and Marketing Implications and Advice

11.1 None as a result of this paper, but the Board should be aware that a separate Communications Plan for the EPS is being prepared.

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ENHANCED PARTNERSHIP BOARD

4 October 2022

Item 06 - Data Plan – Exchange and Analysis

Executive Summary

Customer demand on South Yorkshire's bus network is currently c55.6m against a target of c77m customers by March 2025, which is a major challenge.

It is pivotal to urgently consider interventions that will improve customer demand in a sustainable way. Data and research can play a pivotal role in informing what interventions could be most effective in addressing the demand challenge.

This paper sets out a three-staged data plan, which looks at what data and research is available immediately for informing shorter term action. It also looks beyond to give an initial view of data and analysis gaps that could be addressed in the medium to longer term, but would offer rich information sources to support the aim of attracting more customers to the bus network.

Recommendations

It is recommended that the EP Board:

- **notes** the content of this paper setting out a three-staged data plan;
- **provides** a steer as to what data could be most beneficial in supporting demand improvement activities, on which basis the team will develop a more detailed delivery plan and;
- **endorses** the arrangement of a follow up meeting with data experts from all partners in the EP, to determine what stage 1 data is particularly useful to support demand change and to facilitate data sharing (stage 1).

Consideration by any other Board, Committee, Assurance or Advisory Panel

None

1. Background

- 1.1 The EP Board recognised and discussed the very significant challenge we are facing to achieve a target of 77m passengers on our bus network by March 2025. We currently have 55.6m passengers, annualised to end May 2022, with the outturn

for 2022/23 estimated at 62.2m assuming the September 2022 bus service levels. The service reductions expected in October 2022 and further potential reductions in 2023 are likely to suppress this number. At the current 22m shortfall, we would need to generate and retain 0.75m additional passengers every month for the next 30 months to achieve the target.

- 1.2 The operators advise that although they report demand data to SYMCA on a regular basis, they would benefit from analysis that helps to assess and forecast changes in travel behaviours, trips (origin and destinations), and changes in economic activity to develop new service plans and attract new demand.
- 1.3 In response to the EP Board request, this paper sets out an initial “data plan”. The aim of this plan is to collectively enhance our insights in current and emerging travelling public behaviours and opportunities from the economic and demand data, to support the Enhanced Partnership in developing interventions that attract new demand to the bus network in the short as well as the longer term.

The approach considered here is to bring together data held by operators and SYMCA to create intelligence-led interventions to improve customer demand. This should assist operators in pro-actively responding to emerging market trends (e.g. cost of living crisis aligned fares strategies, new markets to be served based on changes in economic activity).

Instead of solely considering the information we can derive from data we have today, this paper also considers gaps in intelligence and future research that could aid in improving demand for buses, which forms the “data plan” further detailed below for consideration by the EP Board.

2. Data Plan

2.1 Stage 1: Short term – What current data do we have and how could we use this information?

Although across the Partnership there is extensive information about existing travel patterns, there is less clear understanding of people’s wider movements across the region. SYMCA’s Transport Directors are meeting a number of research companies that have the ability to monitor people movements and travel patterns across South Yorkshire. This information will be invaluable in better tailoring bus services with people’s travel needs and we will be looking to incorporate this into the work programme in the coming months.

A working group of SYMCA officers convened to look at what could be provided to bus operators and what could be developed to provide all Enhanced Partnership stakeholders with better understanding and insights that may assist in driving forward improvements in demand.

The group identified a series of **people and economic activity** related datasets that can be provided in the short term to provide indicators for current travelling needs for the public of South Yorkshire. This includes data on:

- Current national and local economic data
- Unemployment and job seekers

- Income levels
- Major employers/Job posting hotspots
- Indications into groups or profiling of population groups
- Schedule of major events (e.g. RLWC)
- Current demographics (most detailed available in Spring)
- Current employment sites/hotspots
- Current housing sites
- Major employers (private and public sector)
- Major public services (shopping or hospitals)
- Town and city centre activity via footfall

SYMCA also has a strong understanding of current **transport supply** from transport related datasets (see **Appendix A 2022 Review Transport Data Sources**):

- Supply (service levels)
- Passenger travel patterns for all customer types by location, day, time etc. enabling tracking of the proportional recovery to pre-Covid overall, by customer type and district and by operator
- Bus performance
- ENCTS passes in circulation including customer current location
- Infrastructure, including cycling
- Customer experience from surveys and customer comments
- Patronage data from comparable geographic areas
- Public transport usage (all modes) for South Yorkshire and nationally

In addition to this data, we have customer and employee survey information on behaviour change. This includes working from home impacts on travel frequency by journey purpose as well as wider context data such as post covid reductions / avoidance of public transport (see **Appendix B Research Carried Out Since 2015**).

The data available reflecting current people and economic activity, could be combined with data on the current provision of public transport to inform shorter term interventions. For example:

- Comments and feedback from customers to inform adjustments to the network.
- Pilots that could drive new demand.
- Events and working with organisers to temporarily step up and promote supply of services to drive new demand.
- Low car ownership levels from demographic data combined with data on low levels of public transport supply, but high levels of nearby people activity (e.g. employment sites, businesses, leisure) could indicate unmet transport demand.
- High unemployment rates from demographic data combined with accessible employment activity (e.g. job postings) within travelling distance, combined with low levels of public transport supply could indicate unmet transport demand.

- Average household income is an indicator of public transport affordability and could be used to shape future fares setting strategies to attract demand or improve yield.

2.2 **Stage 2: Medium term - What are the gaps in information that could support improvements in demand for the bus network?**

There are a number of key areas currently identified where there are gaps in data and insight. These mainly revolve around:

- Longer term forecasts - in very localised changes around economic activity, demographics, policy and socio-cultural changes;
- Evidence based analysis that enables:
 - forecasting of economic, socio-cultural and demographic and policy changes to changes in demand for transport;
 - forecasting of intrinsic changes in the transport system (e.g. pricing, reliability, service frequency, journey time, connectivity, punctuality, quality of service etc) to changes in demand for transport;
- Comprehensive insight into who our current bus customers are as we are lacking robust customer segmentation data – other than for ENCTS customers - identifying where current bus customers live, relevant socio-demographic information, type of ticket purchased, frequency of travel, reason for travel and potential changes to travel patterns;
- Impact of public transport availability on the economy – there is no information on how the presence of the availability of public transport impacts the local economy

Further research and analysis, with specialist analytical support, could be commissioned to build out the data we hold and develop tools to support forecasting models that could help inform future interventions to drive improvements in demand.

We recommend that the EP Board consider what further data analysis and information is to be explored, which could be detailed further through cross-organisational workshops, that could inform a priced proposal for further analysis and development of modelling tools to be considered by the EP Board.

It is envisaged that the data and information above, would provide tools to support the forecasting of localised changes in travel patterns and support changes to the provision of services, fares, service quality, any supporting policy changes and investment priorities to help optimise current customer demand and attract new demand.

2.3 **Stage 3 – Longer term – What progress have we made in data collection?**

Looking beyond existing travel patterns and demand for the current bus network, there is a desire to better understand emerging and future changes in the needs for transport for the people of South Yorkshire. This is in order to understand how we can best respond to these emerging and future needs through the provision of bus services.

Long term geographical changes to demand

Strategic planning or housing or employment sites are likely to change demand over the long term. There is good information on where developments are expected for

housing and employment sites. The East of Doncaster providing an interesting case study in how demand may shift or increase because of both housing and employment.

Strategy led growth

A wider review of the impact of potential policy interventions, not restricted to transport, on patronage would be useful to understand the positive and negative impacts that may be arising in the future.

Economic impact

The MCA has done some further analysis on demand trends such as how the pandemic is influencing economic activity (available [here](#)) and how household fragility is geographically dispersed (draft available [here](#)). These projects can help shape our understanding of how demand for public transport could change.

Demand modelling, preference, and behaviour dynamics require deeper scientific understanding. There are several potential suppliers of this information including academics, industry specialists and experimental modellers.

Behaviour change

The pandemic has precipitated behaviour changes for many workers. South Yorkshire has fewer employees in office-based jobs than other areas, but other factors are shaping how people get to work, where they work, and the decisions made. From a cost perspective, any upward trends in oil prices may swing demand favourably towards public transport from cars (although other factors also drive behaviour change).

SYMCA is looking to gather data on the impact of Covid on future travel patterns in the Annual Travel Survey which could be available in early 2023.

Transport data challenges

We do have strong and robust transport related datasets however, there are some limitations. For example, transport data tends to focus on commuting patterns and main journey purpose, failing to capture more complex trip chains (such as those involved in the mobility of care.) The census transport questions for example only ask about work journeys, potentially skewing planning and funding towards these journeys. Transport usage is not gender neutral and yet often transport data, modelling and appraisal is gender blind.

These and other challenges are being identified as part of an integrated Urban Transport Group workstream, with the aim to address gaps and issues. The first meeting, including SYMCA representation, was 12 September 2022 and regular progress updates will be disseminated.

Wider demand and forecasts

Whilst wider societal and environmental factors shape decision making, the cost-of-living crisis is impacting decisions on using public transport, cars, and leisure. The MCA has economic models which forecast the economy, but these are utilised carefully. Forecasting or projecting bus demand can be done fairly accurately in the short term but over the longer term this can be challenging; models with ability to make changes remain useful to help make decisions, understand interdependencies and plan likely developments.

Wider benefits of public transport

There is a lack of data and research to assess (and then promote) the wider benefits of public transport such as carbon reduction, economic productivity, net zero and healthy life expectancy.

3. Recommendations for Enhanced Partnership Board

- 3.1 It is recommended that a meeting is held to explore in greater detail what information would be beneficial to bus operators in supporting plans to improve demand. This may need to be supported by formal data sharing agreements, which can be explored at the meeting.

Informed by further engagement on data needs and a steer from the EP Board, it is recommended that further detailed research requests are explored and one further step could be to commission research on specific aspects of how demand may be shaped going forward.

List of Appendices Included:

Appendix A 2022 Review Transport Data Sources
Appendix B Research Carried Out Since 2015

Data Sources Transport

Customer and transport data – Local Authority and Government sourced

- Cordon counts
- Footfall in town and city centres
- Air quality data (Sheffield)

Bus Partnership financial period data – Operator sourced

- Passenger numbers by ticket type – Child and Young People, Fare Payers, ENCTS
- Punctuality (Real Time Information) and Journey Times by service
- Town and city centre and business park access by bus within 15 mins data maps
- Scheduled and Operated mileage by Local Authority
- Fleet profile (e.g. Euro)

Transport data – Operator sourced

- Tram and Tram Train passengers and performance
 - Boarding stop and passengers by route
 - Customer type
- Rail passengers (Lennon) and historic performance data
 - Passengers by ticket type and by line of route
- Bus service specific patronage to support projects

Public transport data – Government sourced

- Airport Passengers
- Freight goods carried
- National patronage
- Motor vehicle travel (miles) by LA
- Passenger satisfaction – Bus, Tram & Rail
- Walking and cycling volumes
- Bus open data – punctuality etc.

Public transport data - survey and data sourced

- Customer data (gender etc.)
- Journey purpose; trip frequency by mode
- Satisfaction – overall, punctuality, reliability
- Cycling infrastructure and usage
- Active travel counts (some locations)
- Park and Ride counts
- Interchange footfall
- Customer comments (crm)

Public transport and customer data – Smartcard and Claims

- Ticket type – ENCTS
- Boarding time
- Customer data
 - Passes in circulation
 - Transaction numbers
 - Boarding location
 - ENCTS profile e.g. age and current location
- Estimated average journey length
- Concessions claims information

Bus data – daily data

- Passenger journeys by service
- Boarding stop or fare stage (Stagecoach)
- Time of journey
- Vehicle registration
- Scheduled start time
- Ticket type
- On-board revenue
- Bus boarding by hour
- Proportion to pre-Covid overall, by customer group and district and by operator
- Capacity check by operator
- Lost mileage
- Passenger forecasts by LA, by type by period (also tram forecasts)

Current data sources:

1. Operator Data	5. Other Combined Authorities
2. Customer survey / SYMCA data	6. Transport Focus
3. Real Time	7. DfT / National Data
4. Local Authorities	8. Smartcard

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APPENDIX B

Theme	Title	Date	Carried out by	Methodology	Summary	Cost
Multi-modal user/non-user	SYMCA Travel Survey	May-15	ORS	Postal Survey	6 monthly survey to monitor satisfaction and travel patterns across all modes of transport. Covers users and non users of public transport. Flexibility to cover topical questions	£23,000
Multi-modal user/non-user	SYMCA Travel Survey	Nov-15	ORS	Postal Survey	6 monthly survey to monitor satisfaction and travel patterns across all modes of transport. Covers users and non users of public transport. Flexibility to cover topical questions	£23,000
Multi-modal user/non-user	SYMCA Travel Survey	Nov-16	BMP	Postal Survey	Annual survey to monitor satisfaction and travel patterns across all modes of transport. Covers users and non users of public transport. Flexibility to cover topical questions	£23,000
Multi-modal user/non-user	SYMCA Travel Survey	Nov-17	ORS	Telephone Survey	Annual survey to monitor satisfaction and travel patterns across all modes of transport. Covers users and non users of public transport. Flexibility to cover topical questions	£24,500
Multi-modal user/non-user	SYMCA Travel Survey	Nov-18	ORS	Telephone Survey	Annual survey to monitor satisfaction and travel patterns across all modes of transport. Covers users and non users of public transport. Flexibility to cover topical questions	£24,500
Multi-modal user/non-user	SYMCA Travel Survey	Nov-19	Marketing Means	Telephone Survey	Annual survey to monitor satisfaction and travel patterns across all modes of transport. Covers users and non users of public transport. Flexibility to cover topical questions	£15,485
Covid-19	The Impact of Covid-19 on Public Transport	Apr-21	Explain Research	Telephone Survey	Covid-19 impact on public transport travel behaviour, including expected future travel on PT	£17,450
Young Adult Bus and Tram	Zoom Beyond 18-21 Research	Sep-21	Public Perspectives	Telephone Survey	Wave 1, awareness and current/future usage of Zoom Beyond 18-21 travel pass	£14,000
Young Adult Bus and Tram	Zoom Beyond 18-21 Research	Dec-21	Public Perspectives	Telephone Survey	Wave 2, awareness and current/future usage of Zoom Beyond 18-21 travel pass	£11,000
Interchange	Buzz Box	Dec-19	WE Love Surveys	Self-Completion using terminals	Rolling research: Short question sets on devices at interchanges, questions changed over time e.g. for interchange users to rate service and facilities, rating of bus service etc	£14,500
Non-user barriers to using public transport	Car user focus Groups	Mar-19	ORS	Face to Face Focus Groups	To understand exactly what respondents are wanting from a bus service? Why car users do not use public transport? What might encourage car users to use public transport or use it more than they currently do?	£14,335
Tram	Tram household survey	Apr-17	ARP	Face to Face Interviews	Targeted research aimed at non-users/infrequent users/lapsed users	£18,465
Rail stations	Rail Stations Infrastructure Improvements Research	Jun-22	QA Research Ltd	Face to Face Interviews	Prior to facilities improvements at 11 stations, research was carried to understand current satisfaction with facilities at these stations and to profile customer travel patterns.	£22,350
ENCTS	ENCTS Bus Travel	May-16	NWA	Face to Face Interviews	Pass take up. Travel patterns and journey purpose	£20,000
ENCTS	Goldcard Feasibility	Feb-22	SYMCA	Face to Face using SYMCA Auditors	Potential take up at different price points	£0
Interchange	Interchange Pedestrian Safety	Sep-21	SYMCA	SYMCA Auditor Observations	How many passengers and drivers are using the walkways at the Interchanges inappropriately.	£0
Tram	Tram On Offs	Sep-20	SYMCA	SYMCA Auditor Observations	Number passengers boarding and alighting	£0
Tram	Tram On Offs	Sep-21	SYMCA	SYMCA Auditor Observations	Number passengers boarding and alighting	£0
Enhanced Partnership	Enhanced Partnership Consultation	Feb-22	SYMCA	Online	Feedback was asked for on the proposed improvements that the Enhanced Partnership is aiming to make – the Enhanced Partnership Plan, and the actions to achieve them	£0

APPENDIX B

Theme	Title	Date	Carried out by	Methodology	Summary	Cost
Tram	Customer Journey Mapping & Insight	Oct-20	Nomensa	In-depth Interviews and Online Survey	End-to-end user experience of customers for Supertram, to identify key pain points, needs and opportunities for growth and improvement	?
Tram Train	Travel Preference	Sep-18	NWA	Face to Face	The Tram Train service will provide better connections between Rotherham and Sheffield and aims to reinvigorate the local economy. Ahead of this launch, travel preference research was required to establish how and why customers currently travel by train between Rotherham and Sheffield	£11,330
Tram Train	Travel Preference	May-19	Xanta	Face to Face	Additional travel preference undertaken at Rotherham Parkgate and Rotherham Central to establish how and why customers travel	£19,684
Covid-19	Travel During Covid-19	May-20	SYMCA	Online	Travel during Covid-19. Current travel patterns, effectiveness measures, expected behaviour once restrictions are lifted	£0
Covid-19	Covid Measures on Public Transport	Sep-21	SYMCA	Online	Carried out weekly from May to September. Awareness and satisfaction with Covid-19 measures	£0
Covid-19	Walking and Cycling	Jun-20	SYMCA	Online	The survey explores the amount and type of activity being undertaken before, during and after lockdown and reason for activity, the survey was carried out between 7 May and 1 June 2020	£0
Covid-19	Employers and Covid-19	Apr-21	SYMCA	Online	to derive insight into working arrangements and potential impacts to commuting behaviour for their employees post COVID-19. Respondents were therefore asked about working arrangements (such as working from home) pre, during and post COVID-19 as well as views on current methods of commuting and public transport.	£0
Covid-19	Key Workers	May-20	SYMCA	Online	Respondents were asked how they travelled to their place of work before lockdown, during lockdown and how they intend to travel to work after lockdown	£0
Covid-19	Employees and Covid-19	Jul-20	SYMCA	Online	Feedback from employees on their views and experience of remote working. We gathered thoughts and opinions on adjusting back to office working and how employees would like the organisation to approach remote working moving forward.	£0
Covid-19	Future Travel	Jul-20	SYMCA	Online	The main aim was to derive insight into travel behaviour post COVID-19. Respondents were asked about trips pre and post Covid and journey purpose, four main areas are looked at – Travel to work, travel to education, travel for shopping and travel for leisure as well as future travel views.	£0
Covid-20	Supporting Schools	Aug-20	SYMCA	Online	School/parent approach to travel and days open following schools reopening in September 2020	£0

ENHANCED PARTNERSHIP BOARD

4 October 2022

(circulated 15 September 2022 for approval in correspondence)

Item 07 - Notice of Enhanced Partnership Scheme Variation

Executive Summary

The South Yorkshire Enhanced Partnership Plan and Scheme was approved by the Mayoral Combined Authority in March 2022 and commenced on 1 April 2022. The Board agreed a variation of the Enhanced Partnership Scheme in June 2022, driven by further information about BSIP funding and delivery of some of the components of the Enhanced Partnership Scheme. This paper seeks to make a further variation, which are the consequence of a number of emerging developments.

Owing to the timing of the next Enhanced Partnership Board on 4 October 2022 and the variations here proposed have dates that sit prior to the Board meeting, it is requested that this approval is given in correspondence.

What does this mean for businesses, people and places in South Yorkshire?

SYMCA's Strategic Economic Plan and the Transport Strategy both underline the importance of the bus network to businesses, residents and visitors in South Yorkshire, whilst the independent Bus Review concluded in June 2020 indicated a number of issues with the current network. The Initial Bus Service Improvement Plan includes a range of short-, medium- and long-term actions aimed at supporting the recovery from the COVID-19 pandemic and providing the bus network that South Yorkshire needs to achieve its aims for a stronger, fairer and greener region. The Enhanced Partnership Plan and Scheme is a means of delivering the short-term actions within the Bus Service Improvement Plan.

Recommendations

It is recommended that the Board considers the contents of the proposed variation to the Enhanced Partnership Scheme and approves them in correspondence, no later than 30 September 2022.

1. Background

- 1.1 The National Bus Strategy, “Bus Back Better”, published in March 2021, required all Local Transport Authorities (LTAs) to produce a Bus Service Improvement Plan (BSIP) by the end of October 2021.
- 1.2 The Initial BSIP for South Yorkshire was submitted to Government on 29 October 2021. It contains a series of 40 prioritised activities, policies and interventions for implementation by the MCA, the constituent local authorities and bus operators that the work done to date suggests will influence and contribute to delivering the desired outcomes and impacts, locally, regionally and nationally. These prioritised activities, interventions and policies should be seen as the collective response to the South Yorkshire Bus Review (July 2020) and the impact of the COVID-19 pandemic, and the means by which the bus network that South Yorkshire wants, and needs can be delivered.
- 1.3 “Bus Back Better” also indicated that the Government’s preferred means of delivering the early outcomes of the Initial BSIP is through an Enhanced Partnership. As set out in the Bus Services Act 2017, an Enhanced Partnership requires an Enhanced Partnership Plan and one or more Enhanced Partnership Schemes (the latter being the detail of how elements of the former will be delivered).
- 1.4 In line with the timetable originally set out by Government, the South Yorkshire Enhanced Partnership Plan and Scheme was approved by the Mayoral Combined Authority in March 2022 and commenced on 1 April 2022. The Enhanced Partnership Scheme (EPS) included as an appendix a set of components and a series of dates for delivery of these components by the parties to the EPS. Within the EPS is a mechanism for a variation to it, and this report seeks approval to a small number of variations.

2. Key Issues

- 2.1 It is necessary to seek a variation to the EPS as set out in paragraphs 5.4 to 5.8 of the EPS. The proposed changes are set out in track changes on Variation No 2 to the EPS that is included in Appendix A. The changes relate to the following:
 - The Board has stipulated that the Customer Charter should be developed by the EP Forum, representing South Yorkshire’s community. The EP Forum Terms of Reference has been developed and endorsed by the Board on 21 June 2022 and the detail of the format and the Forum membership was further refined at the Board of 9 August 2022. The Forum is to meet for the first time on 28 September 2022, starting the development of the Customer Charter. The chosen approach has necessitated a change in wording as shown in Appendix A.
 - The Government has recently announced that it seeks to introduce a temporary £2 flat single fare in 2023 nationally. The impact of this needs to be understood in more detail to enable the completion of a review of single operator products and the premium levels on multi-operator tickets. It is therefore proposed that the review is temporarily suspended with revised review completion dates to be confirmed.
- 2.2 The changes do not seek to remove components from the EPS. Therefore, the Board can be satisfied that the proposed changes will still contribute to achieving the

objectives set out in the Enhanced Partnership Plan and current local transport policies.

3. Options Considered and Recommended for Approval

3.1 Option 1

The Board could decide to reject the proposed variation to the EPS.

3.2 Option 1 Risks and Mitigations

This option is not recommended as this would mean all parties pursuing a set of deliverables that could not be achieved, with the associated reputational risk.

3.3 Option 2

The Board could decide to agree to the proposed variation to the EPS.

3.4 Option 2 Risks and Mitigations

This option is recommended given the most up-to-date information the delivery of the Customer Charter in the EPS following the establishment of the Forum for passenger representation.

3.5 Option 3

The Board could decide to amend the proposed variation further before approval.

3.6 Option 3 Risks and Mitigations

Agreeing the variation to the EPS in a timely manner is important to starting to deliver the activities set out in the BSIP to improve the region's bus services, so any delay may have an adverse impact on this process.

3.7 Recommended Option

Option 2

4. Consultation on Proposal

4.1 The Initial BSIP was developed following the Bus Review published in June 2020. The public consultation conducted as part of the Bus Review was used as evidence in the development of the BSIP and therefore builds on that initial evidence base. The drafting of the Enhanced Partnership was undertaken collaboratively with Local Authority partners, bus operators in South Yorkshire and with input received from bus user groups.

4.2 The Enhanced Partnership Plan and Scheme were subject to a statutory period of consultation with bus operators from mid-November 2021, followed by a period of public consultation during January and February 2022, leading to the production of the version approved by the MCA in March 2022.

5. Timetable and Accountability for Implementing this Decision

5.1 The Enhanced Partnership runs for a five-year period from 1 April 2022.

6. Financial and Procurement Implications and Advice

6.1 None as a result of this paper.

7. Legal Implications and Advice

7.1 The agreed EPS includes a series of clauses covering a variation to the EPS that requires the proposer of a variation to set out such a request in writing and then for the MCA to reconvene the South Yorkshire Bus Partnership Board, giving at least 14 days' notice for the meeting, to consider the proposed variation. This process has been followed for the proposed variation. None as a result of this paper

7.2 Assuming the proposed variation is agreed by members of the Board present, SYMCA will make the EPS variation, subject to the approval of the relevant local highway authorities and SYMCA. Partners not represented at the meeting will be deemed to be abstaining from the decision.

8. Human Resources Implications and Advice

8.1 None as a result of this paper.

9. Equality and Diversity Implications and Advice

9.1 The EPP sets out the region's plans for improving accessibility across the bus network and on board our services and the EPS is the means by which these improvements will start to be delivered.

9.2 Under section 149 of the Equality Act 2010, in agreeing any actions relating to the EPP and the EPS, the Board should have due regard to the need to:

- i. Eliminate discrimination, harassment and victimisation;
- ii. Advance equality of opportunity between those who share a protected characteristic and persons who do not share it; and
- iii. foster good relations between those who share a protected characteristic and persons who do not share it.

9.3 In having due regard to the need advance the equality of opportunity between persons who share a protected characteristic and persons who do not, Members should have due regard to the need to:

- a) remove or minimise disadvantages suffered by persons who share a relevant protected characteristic that are connected to that characteristic;
- b) take steps to meet the needs of persons who share a relevant protected characteristic that are different from the needs of persons who do not share it;
- c) encourage persons who share a relevant protected characteristic to participate in public life or in any activity in which participation by such persons is disproportionately low.

9.4 It is for Members to determine the weight to be given to the various factors that inform the decision, including the equality impacts and the legal duty under Section 149. However, it is considered that the proposed Enhanced Partnership Plan and

Enhanced Partnership Scheme have positive equality implications under the Equality Act 2010.

10. Climate Change Implications and Advice

10.1 The EPP sets out the scale of change required to meet the region's net zero targets by 2035. At present the region does not have any zero emission buses and the EPP identifies the trajectory, costs and initial projects that could begin the transition from diesel to alternative fuels – some of these initial projects are included in the EPS.

11. Information and Communication Technology Implications and Advice

11.1 None as a consequence of this paper

12. Communications and Marketing Implications and Advice

12.1 Not applicable

List of Appendices Included

A South Yorkshire Enhanced Partnership Scheme Variation No 2

Background Papers

South Yorkshire Bus Service Improvement Plan (Initial Version) – October 2021

<https://southyorkshire-ca.gov.uk/explore/transport>

South Yorkshire Enhanced Partnership Scheme Variation No 1 – June 2022

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South Yorkshire Mayoral Combined Authority
Barnsley Metropolitan Borough Council
Doncaster Borough Council
Rotherham Metropolitan Borough Council
Sheffield City Council

**South Yorkshire Enhanced Partnership Scheme
for Buses**

1st April 2022

Record of Variations

Variation No	Date Agreed	Key Variations
1	21 June 2022	Amendments to scheme delivery dates Removal of elements no longer funded
2	4 October 2022	Amendment to scheme delivery date (Implementation of customer charter)

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Organisations Making the Enhanced Partnership Scheme

**THE SOUTH YORKSHIRE ENHANCED PARTNERSHIP SCHEME FOR BUSES IS
MADE IN ACCORDANCE WITH SECTION 138G (1) OF THE TRANSPORT ACT 2000**

BY:

- (1) SOUTH YORKSHIRE MAYORAL COMBINED AUTHORITY (SYMCA) of 11,
BROAD STREET WEST, SHEFFIELD S1 2BQ;**
- (2) BARNSELY METROPOLITAN BOROUGH COUNCIL OF TOWN HALL, CHURCH
STREET, BARNSELY S70 2TA;**
- (3) DONCASTER BOROUGH COUNCIL OF CIVIC OFFICE, WATERDALE,
DONCASTER DN1 3BU;**
- (4) ROTHERHAM METROPOLITAN BOROUGH COUNCIL OF RIVERSIDE HOUSE,
MAIN STREET, ROTHERHAM S60 1AE;**
- (5) SHEFFIELD CITY COUNCIL of TOWN HALL, PINSTONE STREET, SHEFFIELD
S1 2HH.**

Definitions Used in the Document

Authorities – the parties to this Scheme.

Bus Franchising Area – an area in which a statutory franchising scheme operates, as prescribed in the Transport Act 2000, as amended by the Bus Services Act 2017 (Section 123A).

EP Scheme Area – means the area to which this EP Scheme document applies, namely the geographical area of South Yorkshire, that includes the four local authority areas of Barnsley, Doncaster, Rotherham and Sheffield.

Facilities – means the physical assets (or changes to them) that are provided at specific locations along particular routes (or parts of routes) within the EP Scheme Area including new and improved bus priority measures in accordance with Section 138D(1) of the Transport Act 2000.

Local Authorities – as prescribed under Section 23 of the Local Government Act 2003.

Local Highway Authorities – this means either Sheffield City Council (Sheffield CC), Doncaster Borough Council (Doncaster BC), Barnsley Metropolitan Borough Council (Barnsley MBC) or Rotherham Metropolitan Borough Council (Rotherham MBC).

Local Service(s) – means a ‘local service’ as defined in Section 2 of the Transport Act 1985.

Local Qualifying Bus Services – means those Registered Local Bus Services operating within the EP Scheme Area with one or more stopping place in the EP Scheme Area that must meet the requirements and obligations set out in this EP Scheme document.

Measures – means the measures taken with the purpose of:

- increasing the use of local bus services serving the routes to which the measures relate or ending or reducing a decline in their use; or
- improving the quality of local bus services serving the routes to which those measures relate in accordance with Section 138D(2) of the Transport Act 2000.

Registered Local Bus Service – means a ‘local service’ as defined in Section 2 of the Transport Act 1985 which is registered in accordance with Section 6 of that Act.

South Yorkshire Bus Partnership Board – established in 2021, this is an alliance of bus operators, Authorities, and other partners that have agreed to work together to deliver high levels of passenger satisfaction and drive forward investment in bus services.

South Yorkshire Enhanced Partnership Plan – means the document made pursuant to Section 138A of the Transport Act 2000 and which is required to be in place for an EP Scheme to be made.

SYMCA – means the South Yorkshire Mayoral Combined Authority with responsibility for transport for South Yorkshire.

TRO – means a Traffic Regulation Order, made under the Road Traffic Regulation Act 1984 or any other enactment regulating the use of roads or other places.

1. Introduction

- 1.1 This document fulfils the statutory requirements set out in the Transport Act 2000 as amended by the Bus Services Act 2017 for an Enhanced Partnership (EP) Scheme. In accordance with statutory requirements in Section 138A to S of the Transport Act 2000, this EP Scheme document sets out:
- Area covered (Section 2)
 - Commencement date and period of operation (Section 2)
 - Requirements of the Authorities (Section 3)
 - Requirements imposed on Local Qualifying Bus Services (Section 4)
 - EP Scheme Management including details for varying, reviewing and revoking the operation of the EP Scheme (Section 5)
 - Competition considerations (Section 6).
- 1.2 The EP Scheme can only be put in place if an associated Enhanced Partnership Plan has been made. Therefore, this document should be considered alongside the South Yorkshire Enhanced Partnership (EP) Plan. SYMCA is satisfied that this EP Scheme will contribute to the implementation of policies set out in the EP Plan and its local transport policies.
- 1.3 The EP Scheme has been jointly developed by SYMCA, local highway authorities and operators that provide Local Qualifying Bus Services in the EP Scheme Area. The EP Scheme aims to support improvements to bus services across South Yorkshire. It sets out obligations and requirements on SYMCA, local highway authorities and operators of Local Qualifying Bus Services in order to achieve the intended improvements, with the aim of passengers benefitting from attractive and convenient bus services. SYMCA is satisfied that the EP Scheme will (a) bring benefits to persons using local services in the whole or any part of the EP Scheme Area by improving the quality or effectiveness of those services, or (b) reduce or limit traffic congestion, noise or air pollution.
- 1.4 The EP Scheme aims to contribute towards meeting the vision and objectives set out in the EP Plan.

2. Scope of the EP Scheme

- 2.1 The EP Scheme will support improvement of local services operating in South Yorkshire.
- 2.2 A map of the EP Scheme Area is shown in Figure 1.
- 2.3 The EP Scheme start date will be 70 days after it has been made, with subsequent milestone dates by which certain Facilities and Measures (Section 3) and requirements of bus operators in respect of Local Qualifying Bus Services will be introduced (Section 4) (see Table in the Appendix for these dates). The EP Scheme will be in place for a minimum of 3 years and a maximum of 5 years and will be subject to a review by SYMCA at least annually in accord with the review of the EP Plan (Section 5).
- 2.4 Registered Local Bus Services with one or more stopping places within the EP Scheme Area are classed as 'Local Qualifying Bus Services', except those with locally-agreed exemptions, as set out below:
- Services operating across the EP Scheme Area boundary with minority mileage within, or express services specifically for commuters from outside the boundary into the EP Scheme Area
 - Third party funded services where such funding is a substantial or sole source of funding, excluding fare box/BSOG/concessions revenue.

Figure 1 Map of the EP Plan and EP Scheme Area



3. Requirements of the Authorities

Facilities and Measures

The Authority named in columns 1 and 2 of the table in the Appendix will provide the Facilities and Measures detailed by the dates indicated.

4. Requirements in Respect of Local Qualifying Bus Services

Operators of Local Qualifying Bus Services will meet the requirements set out in column 3 of the table in the Appendix by the date indicated.

5. EP Scheme Management

Governance

- 5.1 The EP Scheme has been developed through partnership meetings held between operators of Local Qualifying Bus Services and the Authorities and a number of interested stakeholders, comprising:
- Bus user groups
 - Representatives of disabled people
 - Local business groups
 - South Yorkshire Local Enterprise Partnership
 - Confederation of Passenger Transport
 - South Yorkshire Bus Review Commissioners
 - Neighbouring Local Authorities.
- 5.2 In advance of the making of the EP Scheme, a SYMCA Bus Partnership Board will be set up, drawing on the representatives involved to date, to oversee work on the delivery of the EP Plan and EP Scheme
- 5.3 The SYMCA Bus Partnership Board will be responsible for considering future variations, in accordance with the processes detailed in Sections 5.4 to 5.8.

Variations to the EP Scheme

- 5.4 Consideration will be given to potential EP Scheme variations highlighted either by one of the organisations represented on the South Yorkshire Bus Partnership Board or an operator of Local Qualifying Bus Services. The proposer of a variation should demonstrate how this might contribute to achieving the objectives set out in the EP Plan and current local transport policies. Such requests should be set out in writing and submitted to EPSchemeVariations@southyorkshire-ca.gov.uk.
- 5.5 On receipt of a valid request for a variation, SYMCA will reconvene the South Yorkshire Bus Partnership Board, giving at least 14 days' notice for the meeting, to consider the proposed variation. If the proposed variation is agreed by all bus operator and local highway authority and SYMCA representatives present, SYMCA will make the EP Scheme variation, subject to the approval of the relevant local highway authorities and SYMCA. Partners not represented at the meeting will be deemed to be abstaining from the decision.
- 5.6 If there is not full agreement of all partners present, then the proposed variation will be put to the operator objection mechanism, but with a reduced objection period of 14 days replacing Part 2 of the Transport Act 2000 Section 138L(2)(c). The proposed variation will be advertised on the SYMCA website and emailed to operators of Local Qualifying Bus Services in the EP Scheme Area. If the proposed variation passes the operator objection mechanism, SYMCA will make the EP Scheme variation, subject to the approval of the relevant local highway authorities and SYMCA.

- 5.7 In accordance with section 138E of the Transport Act 2000 the procedure set out in this section 4 shall apply in place of the provisions of Section 138L to N of the Transport Act 2000.
- 5.8 Changes to or new flexibility provisions under Section 138E of the Transport Act 2000 shall only be included in the EP Scheme if they satisfy the statutory objection mechanism as set out in The Enhanced Partnership Plans and Schemes (Objections) Regulations 2017.

Review of the EP Scheme

- 5.9 Once the EP Scheme is made, it will be reviewed by the South Yorkshire Bus Partnership Board at least annually, in accord with the review of the EP Plan, commencing no later than on the anniversary of the scheme commencement date. SYMCA will initiate each review and it will take no longer than 6 months to complete.
- 5.10 Should Traffic Regulation Orders (TRO) required for the Facilities listed in the Appendix not be made, the Authorities and operators of Local Qualifying Bus Services will recognise the need to vary the EP Scheme through the variation process set out in Sections 5.4 to 5.8. Any such necessary changes will be considered as part of the first annual review.

Revocation of the EP Scheme

- 5.11 An EP Scheme can only exist if an EP Plan is in place. If, for any reason, the EP Plan is revoked, it would automatically mean that the EP Scheme would cease. Equally, if all EP Schemes ceased, the EP Plan would be revoked.
- 5.12 If, for some reason, it becomes necessary for the EP Scheme to be revoked, the South Yorkshire Bus Partnership Board will be reconvened and follow the same process as outlined in Sections 5.4 to 5.8 (noting that the agreement will be for revocation and not variation).
- 5.13 If at any point in the future the EP Scheme Area is included in a Bus Franchising Area, the relevant requirements set out in this EP Scheme will cease to apply from the commencement date of the franchising scheme.

6. Competition

- 6.1 The EP Plan and the EP Scheme have been developed in conjunction with all bus operators, is intended to apply across the whole of the South Yorkshire bus network and does not propose any activity that would ordinarily impose any necessary restrictions on the deregulated bus market. The Competition Test set out in Part 1 of Schedule 10 to the Transport Act 2000 has been applied and it is concluded that, at this point, there will be no significantly adverse effect on competition arising from the EP Plan or the EP Scheme.

Signatory Page

Signed for and on behalf of:

- (1) **THE SOUTH YORKSHIRE MAYORAL COMBINED AUTHORITY
(SYMCA) of 11, BROAD STREET WEST, SHEFFIELD S1 2BQ**

PRINT NAME _____

SIGNATURE _____

- (2) **BARNSELY METROPOLITAN BOROUGH COUNCIL OF TOWN HALL,
CHURCH STREET, BARNSELY S70 2TA**

PRINT NAME _____

SIGNATURE _____

- (3) **DONCASTER BOROUGH COUNCIL OF CIVIC OFFICE, WATERDALE,
DONCASTER DN1 3BU**

PRINT NAME _____

SIGNATURE _____

- (4) **ROTHERHAM METROPOLITAN BOROUGH COUNCIL OF RIVERSIDE
HOUSE, MAIN STREET, ROTHERHAM S60 1AE**

PRINT NAME _____

SIGNATURE _____

- (5) **SHEFFIELD CITY COUNCIL OF TOWN HALL, PINSTONE STREET,
SHEFFIELD S1 2HH**

PRINT NAME _____

SIGNATURE _____

Appendix: South Yorkshire Enhanced Partnership Scheme

Enhanced Partnership Plan Headline Output	Components of the Enhanced Partnership Scheme					
	Facilities provided by SYMCA/Local Highway Authorities <i>(new physical assets or changes to them provided at specific locations)</i>	Delivered no later than	Measures provided by SYMCA/Local Highway Authorities <i>(anything within MCA powers to increase local service use, stop decline or improve quality)</i>	Delivered no later than	Operation and/or Route Requirements placed on operators of Local Qualifying Bus Services	Delivered no later than
1. More frequent and reliable services	<ul style="list-style-type: none"> A61 bus priority road widening scheme at two key locations along the A61 Corridor in Barnsley between Carlton Road and the Old Mill Lane Gyratory (SYMCA and Barnsley MBC jointly delivering the project and Barnsley MBC providing TRO as required) A630 bus scheme is a project to upgrade in traffic signal technology along the A630 Balby Road Corridor in Doncaster to improve bus journey time, reliability and punctuality (SYMCA scheme promoter, Doncaster BC delivering the project and providing TRO as required) Building of a new bridge and highway link between West End Lane in New Rossington and iPort Avenue – the scheme would facilitate up to 8 buses per hour (55/56 bus service) being routed through 	31/03/24	<ul style="list-style-type: none"> Introduce pilot DRT service in at least one area (SYMCA) 	30/09/23	<ul style="list-style-type: none"> Review existing Voluntary Partnership Agreements and retain or enhance existing operational requirements 	30/09/22

Enhanced Partnership Plan Headline Output	Components of the Enhanced Partnership Scheme					
	<i>Facilities provided by SYMCA/Local Highway Authorities (new physical assets or changes to them provided at specific locations)</i>	<i>Delivered no later than</i>	<i>Measures provided by SYMCA/Local Highway Authorities (anything within MCA powers to increase local service use, stop decline or improve quality)</i>	<i>Delivered no later than</i>	<i>Operation and/or Route Requirements placed on operators of Local Qualifying Bus Services</i>	<i>Delivered no later than</i>
	<p>the iPort via a bus gate along a camera enforced bus lane (SYMCA scheme promoter, Doncaster BC delivering the project and providing TRO as required)</p> <ul style="list-style-type: none"> Improving bus service punctuality in Barnsley through traffic management in seven priority areas (SYMCA scheme promoter, Barnsley MBC delivering the project and providing TRO as required) 	31/03/23				
2. Improvements to planning / integration with other modes	<ul style="list-style-type: none"> -193 new real time information displays provided (broadly 20% each in Barnsley, Doncaster and Rotherham, and 40% in Sheffield, based on stop usage and 'gaps' in provision) (SYMCA delivering the project) 	31/03/23	<ul style="list-style-type: none"> Sheffield City Council to ensure all parties have access to the UTMC system in order to deliver better real-time network information to operators and customers (Sheffield CC) Develop one integrated source of information to plan journeys and promote the agreed source (SYMCA) 	31/03/23 31/03/23	<ul style="list-style-type: none"> Ensure that real-time location data is provided to Sheffield City Council for use in the UTMC system to improve reliability and customer information Support the development of one integrated source of information to plan journeys and promote the agreed source 	31/03/23 31/03/23

Enhanced Partnership Plan Headline Output	Components of the Enhanced Partnership Scheme					
	<i>Facilities provided by SYMCA/Local Highway Authorities (new physical assets or changes to them provided at specific locations)</i>	<i>Delivered no later than</i>	<i>Measures provided by SYMCA/Local Highway Authorities (anything within MCA powers to increase local service use, stop decline or improve quality)</i>	<i>Delivered no later than</i>	<i>Operation and/or Route Requirements placed on operators of Local Qualifying Bus Services</i>	<i>Delivered no later than</i>
3. Improvements to fares and ticketing including Multi-Operator Ticketing Schemes			<ul style="list-style-type: none"> Introduce a 'tap and cap' system across the network, subject to the necessary technological solution being provided by the Department for Transport (DfT) (SYMCA) 	31/03/23	<ul style="list-style-type: none"> Convert remaining on-bus electronic payment machines to contactless Review the removal of single operator products in most localised areas <u>(deferred until impact of Government's £2 single flat fare initiative for 2023 is understood)</u> Review premium levels on multi-operator ticket products Implement a 'tap and cap' system across the network, subject to the necessary technological solution being provided by the DfT Price rises limited to once a year 	31/03/23 30/09/22 <u>TBC</u> <u>TBC</u> 30/09/22 31/03/23 30/09/22

Enhanced Partnership Plan Headline Output	Components of the Enhanced Partnership Scheme					
	<i>Facilities provided by SYMCA/Local Highway Authorities (new physical assets or changes to them provided at specific locations)</i>	<i>Delivered no later than</i>	<i>Measures provided by SYMCA/Local Highway Authorities (anything within MCA powers to increase local service use, stop decline or improve quality)</i>	<i>Delivered no later than</i>	<i>Operation and/or Route Requirements placed on operators of Local Qualifying Bus Services</i>	<i>Delivered no later than</i>
4. Higher specification buses			<ul style="list-style-type: none"> Procurement of up to 27 electric buses and provision of charging infrastructure at interchanges, on-street and at depots, subject to successful award of ZEBRA funding by the DfT (SYMCA) Upgrade part of the South Yorkshire community transport fleet to electric vehicles, with charging facilities at selected depots (SYMCA) Electric bus trial in Doncaster (Doncaster BC) 	<p>31/03/24</p> <p>30/12/23</p> <p>31/03/24</p>	<ul style="list-style-type: none"> Retain standards within existing Voluntary Partnership Agreements and include within new standard to be agreed 	30/09/22
5. Improvements to passenger engagement			<ul style="list-style-type: none"> Implement <u>Commence work to an agreed a</u> new Customer Charter to apply across the whole network (SYMCA) 	30/09/22	<ul style="list-style-type: none"> Implement <u>Commence work to an agreed a</u> new Customer Charter to apply across the whole network 	30/09/22

Enhanced Partnership Plan Headline Output	Components of the Enhanced Partnership Scheme					
	<i>Facilities provided by SYMCA/Local Highway Authorities (new physical assets or changes to them provided at specific locations)</i>	<i>Delivered no later than</i>	<i>Measures provided by SYMCA/Local Highway Authorities (anything within MCA powers to increase local service use, stop decline or improve quality)</i>	<i>Delivered no later than</i>	<i>Operation and/or Route Requirements placed on operators of Local Qualifying Bus Services</i>	<i>Delivered no later than</i>
			<ul style="list-style-type: none"> Develop new forum for passenger representation, to include bus user groups, representatives of disabled people and local business groups (SYMCA) 	30/06/22	<ul style="list-style-type: none"> Service changes to be limited to twice per year 	30/09/22
6. Strong network identity	<ul style="list-style-type: none"> Installation of at least 140 new shelters (broadly 20% each in Barnsley, Doncaster and Rotherham, and 40% in Sheffield), based on stop usage and state of dilapidation) (SYMCA delivering the project and Local Highway Authorities providing TRO as required) 	31/03/23	<ul style="list-style-type: none"> Extend the “Safe Places” scheme to cover the whole network (SYMCA) Implementation of a common branding across South Yorkshire transport network (SYMCA) 	31/03/23 31/03/23	<ul style="list-style-type: none"> Implement the “Safe Places” scheme on-board buses Support the implementation of a common branding across South Yorkshire transport network 	31/03/23 31/03/23

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Enhanced Partnership Board 4 October 2022 Item 9 – EP Scheme Progress Report

Executive Summary

The South Yorkshire Enhanced Partnership Plan and Scheme was approved by the Mayoral Combined Authority in March 2022 and commenced on 1 April 2022.

This paper summarises the progress made in delivering the agreed components of the Scheme, upcoming milestones, risks and issues and any actions to be considered by the Board.

What does this mean for businesses, people and places in South Yorkshire?

SYMCA's Strategic Economic Plan and Transport Strategy both underline the importance of the bus network to businesses, residents and visitors in South Yorkshire, whilst the independent Bus Review indicated a number of issues with the current network. The Service Improvement Plan includes a range of short-, medium- and long-term actions aimed at supporting the recovery from the COVID-19 pandemic and providing the bus network that South Yorkshire needs to achieve its aims for a stronger, fairer and greener region. The Enhanced Partnership Plan and Scheme is a means of delivering the short-term actions within the Bus Service Improvement Plan

Recommendations

It is recommended that the Board notes the contents of this paper in relation to progress with the Enhanced Partnership Scheme and provides support where this is required.

1. Background

- 1.1 The South Yorkshire Enhanced Partnership Plan (EPP) and Scheme (EPS) was approved by the Mayoral Combined Authority in March 2022 and commenced on 1 April 2022. Effective and timely delivery of the components of the EPS, and any interventions included in other EPSs that may be agreed, is critical to the achievement of the objectives of the EPP.
- 1.2 As part of the regular reporting cycle to the Enhanced Partnership Board, the EP Development Group receives and discusses a regular EPS Programme Monitoring

Report. This paper summarises the key issues arising and any actions that to be considered by the Board.

- 1.3 It should be noted that the activity discussed in this paper does not represent the totality of the activity underway across South Yorkshire by all partners to improve bus services. The EP Development Group has started collating information on bus initiatives undertaken by all parties in the Enhanced Partnership to provide a fuller picture to the Board, with a progress monitoring mechanism.

2. Summary of Key Changes in EPS Delivery

- 2.1 *Develop new forum for passenger representation, to include bus user groups, representatives of disabled people and local business groups* – The Mayor has invited all members of the EP Forum to a first meeting on 28 September 2022, which will revolve around starting the development of a new Customer Charter.

Implementation of a common branding across South Yorkshire transport network – An initial rollout plan was discussed at the EP Development Group on 7 September 2022 and will be progressed to develop a proposal for the EP Board.

Service changes to be limited to twice per year – The August 2022 EP Operating Group meeting agreed to limit service changes to twice a year, with typical dates agreed to be the first Sunday after Easter and the last Sunday before the start of a new school year. (NB: October 2022 changes count as a service change).

Price rises limited to once a year – Operating Group agreed price rises once a year in January, except for 2023 when a price change might be implemented in March to fall in line with the rail industry.

A61 bus priority road widening scheme – The scheme is currently awaiting planning permission, which has been delayed (planning application submitted in December 2021). The granting of this permission will determine the delivery timeline, but preparatory and mobilisation work continues to progress in the meantime, assuming construction work can commence after Christmas holidays in early 2023. There is a funding shortfall to deliver both phases, with the Project Manager exploring alternative options to deliver Phase 2.

Introduction of pilot DRT service in at least one area & Consider new types of service as part of review of tendered services, using electric vehicles &

Fleet replacement and retrofitting to achieve a net zero fleet &

Create a single source of information to plan journeys – A LUF2 bid has been submitted to DLUHC in early August 2022 to support these priority activities via a DRT technical platform and electric buses and investment proposals to digitise customer information to create consistency and easy access to information at bus stops and other key locations. Work is progressing on developing the OBC for submission to DLUHC in “autumn 2022” (no deadline given).

Partners were invited at the EP Development Group on 7 September 2022 to bring forward ideas for bus routes for further rollout of electric buses, which has some earmarked capital funding available from SYMCA’s CRSTS allocation. Bus operators were invited to put forward their interest in partnering with SYMCA in the acquisition and operation of further electric buses.

3. Key Milestones Achieved during Last 2 Months

- 3.1 Proposed EP Forum members received an invite from the Mayor to participate and the first meeting has been scheduled for 28 September 2022.
- 3.2 The EP Operating Group have agreed dates and timings around annual fares changes and service changes twice a year, completing two of the EP Scheme components.
- 3.3 The LUF2 bid was submitted by SYMCA to DLUHC in early August 2022, which if successful could support some of the currently unfunded priority activities.
- 3.4 The EP Development Group have selected a top 6 of priority activities and nominated leads from all partners to further develop these into concepts for consideration by the EP Board to adopt as new EP Schemes.

4. Key Milestones Planned for Next 2 Months

- 4.1 *Commence work on a new Customer Charter to apply across the whole network – the EP Forum will be tasked with starting the development of a new Customer Charter and will present this back to the EP Board in due course.*

Review existing Voluntary Partnership Agreements and retain or enhance operational requirements – Operators are to review existing VPAs, undertake 'gap' analysis of any standards/requirements not covered in the current EPS and to review proposals arising from 'gap' analysis of existing standards.

Review the removal of single operator products in most localised areas – Operators to start undertaking this review taking into consideration the £2 flat fare initiative recently announced by Government.

Review premium levels on multi operator ticket products – Operators to start undertaking this review taking into consideration the £2 flat fare initiative recently announced by Government.

These milestones will be brought together with the work on demand recovery action planning, with a view to hold a separate joint meeting during the week commencing 11 October.

5. Key Risks/Issues

- 5.1 Key risks at this point are considered to be:

- Ensuring sufficient momentum is maintained in delivering the EP Schemes with limited resources (funding and people).
- Immediate action planning in the short term needs to be done in parallel, considering the community impact of imminent bus service changes and the need to drive forward improvement initiatives that can materially improve customer demand in the short term in order to achieve the EP Targets.

6. Action(s) Required from Enhanced Partnership Board

- 6.1 For the EP Board to ensure all partners in the Enhanced Partnership to recognise the EP Scheme components agreed and assigned to them, ensuring progress is being made (and reported back on) in line with the dates and scope agreed.

7. Financial and Procurement Implications and Advice

- 7.1 None as a result of this paper.

8. Legal Implications and Advice

- 8.1 None as a result of this paper.

9. Human Resources Implications and Advice

- 9.1 None as a result of this paper.

10. Equality and Diversity Implications and Advice

- 10.1 The EPP sets out the region's plans for improving accessibility across the bus network and on board our services and the EPS is the means by which these improvements will start to be delivered.

- 10.2 Under section 149 of the Equality Act 2010, in agreeing any actions relating to the EPP and the EPS, the Board should have due regard to the need to:

- i. Eliminate discrimination, harassment and victimisation;
- ii. Advance equality of opportunity between those who share a protected characteristic and persons who do not share it; and
- iii. foster good relations between those who share a protected characteristic and persons who do not share it.

11. Climate Change Implications and Advice

- 11.1 The EPP sets out the scale of change required to meet the region's net zero targets by 2035. At present the region does not have any zero emission buses and the EPP identifies the trajectory, costs and initial projects that could begin the transition from diesel to alternative fuels – some of these initial projects are included in the EPS.

12. Information and Communication Technology Implications and Advice

- 12.1 None as a result of this paper.

13. Communications and Marketing Implications and Advice

- 13.1 None as a result of this paper.

List of Appendices Included – Appendix A EPS1 Progress Monitoring Report v12

Enhanced Partnership Scheme 1 - Progress Monitoring

Date: 16th September

Version: 13.0

Enhanced Partnership Plan Headline Output		Enhanced Partnership Scheme Components	Lead	Lead Officer	Delivered no later than as stated in EP_Variation 1 dtd June 2022	Source of Funding	Estimated Cost of the Scheme £	Status of funding	RAG Rating			Actions	Comments
									Red	Amber	Green		
1. More Frequent and reliable Service	Facilities provided by SYMCA/LHA	A61 bus priority road widening scheme	SYMCA	Jeremy Hall	31/03/24	TCF	£13.28 m	Funding Shortfall	R			Project Manager trying to identify alternative additional funding sources	Short of budget to deliver Phase 2. FBC approved for one of the phases to be delivered subject to land deal approval. Risk
2. More Frequent and reliable Service	Facilities provided by SYMCA/LHA	A630 bus scheme with traffic signal technology	SYMCA	Ben Hardy	30/04/23	TCF	£1.6 m	Funded			G		Contract awarded and on programme to deliver
3. More Frequent and reliable Service	Facilities provided by SYMCA/LHA	New iPort bridge	SYMCA	Ben Hardy	31/03/24	TCF	£5.46 m	Funding Shortfall	R			Confirmation of funding required by 16th September	Target cost expected by 16th September and compare it with the available budget.
4. More Frequent and reliable Service	Facilities provided by SYMCA/LHA	Improving bus service punctuality in Barnsley	SYMCA	Jeremy Hall	31/03/23			Funded			G		Delivery of 7 bus priority schemes in Barnsley
5. More Frequent and reliable Service	Measures provided by SYMCA/LHA	Introduction of pilot DRT service in at least one area, subject to funding from LUF being confirmed	SYMCA	Pat Beijer	30/09/23	LUF		Bid submitted			G		Early discussions being held with VIVAVEN(Supplier) for the potential route
6. More Frequent and reliable Service	Operation or Route requirements Placed on Operators	Review existing Voluntary Partnership Agreements and retain or enhance operational requirements	Operators	Kevin Belfield (FIRST) Mathew Kitchen (Stagecoach) Mathew Cranwell (Stagecoach) Andrew McGuinness(CPT)	30/09/22	-		-		A		Operators to present at next EP board the review of existing VPAs	
7. Higher Specification buses	Operation or Route requirements Placed on Operators	Retain standards within existing Voluntary Partnership Agreements and include within new standard to be agreed	Operators	Kevin Belfield (FIRST) Mathew Kitchen (Stagecoach) Mathew Cranwell (Stagecoach) Andrew McGuinness(CPT)	30/09/22	-		-		A		Operators to review proposals arising from 'gap' analysis of existing standards outlined above	Incorporate target for Emission target, covered in BSIP activity 37, detailed roll out plan will be defined as the part of the BSIP priority activity 37 (Fleet replacement and retrofitting to achieve a net zero fleet)
8. Improvements to planning/integration with other modes	Facilities provided by SYMCA/LHA	Installation of 190 new real time information displays	SYMCA	Rebecca Roe	31/03/23	Gainshare		Funded			G		
9. Improvements to planning/integration with other modes	Measures provided by SYMCA/LHA	Sheffield City Council to ensure all parties have access to UTM system in order to deliver better real time network information to operators and customers	SCC	Tom Finnegan-Smith(TFS)	31/03/23	-		-		A		TFS has delegated to Pete Vickers	
10. Improvements to planning/integration with other modes	Operation or Route requirements Placed on Operators	Ensure that real time data is provided to SCC for use in UTM system to improve reliability and customer information	SYMCA	Mark Cowling	31/03/23	-		-		A		Once above action is completed, Development Group to confirm how to make information available	
11. Improvements to planning/integration with other modes	Measures provided by SYMCA/LHA	Develop one integrated source of information to plan journeys and promote the agreed source	SYMCA	Rebecca Roe(RR)	31/03/23			Explore Funding		A		Work in progress, RR to develop a plan for discussion, explore funding source	Included in LUF bid, Bid has been submitted to DLUHC on 2nd August 2022
12. Improvements to planning/integration with other modes	Operation or Route requirements Placed on Operators	Support the development of one integrated source of information to plan journeys and promote the agreed source	Operators	Kevin Belfield (FIRST) Mathew Kitchen (Stagecoach) Mathew Cranwell (Stagecoach) Andrew McGuinness(CPT)	31/03/23				R			Related to task above	
13. Improvements to fares and ticketing Multi Operator Ticketing Schemes	Measures provided by SYMCA/LHA	Introduce a 'tap and cap' system across the network, subject to the necessary technological solution being provided by the DfT	SYMCA	Alison Pilling	31/03/23				R			Need to confirm with DfT when technical solution likely to be available.	Alison Pilling completed a piece of work on Retailing Strategy
14. Improvements to fares and ticketing Multi Operator Ticketing Schemes	Operation or Route requirements Placed on Operators	Implement a 'tap and cap' system across the network, subject to the necessary technological solution being provided by the DfT	Operators	Kevin Belfield (FIRST) Mathew Kitchen (Stagecoach) Mathew Cranwell (Stagecoach) Andrew McGuinness(CPT)	31/03/23				R			Need to confirm with DfT when technical solutions likely to be available.	Operators to propose early wins
15. Improvements to fares and ticketing Multi Operator Ticketing Schemes	Operation or Route requirements Placed on Operators	Convert remaining on-bus electronic payment machines to contactless	Operators	Kevin Belfield (FIRST) Mathew Kitchen (Stagecoach) Mathew Cranwell (Stagecoach) Andrew McGuinness(CPT)	31/03/23					A		Need a list of which vehicles are not currently equipped for contactless operation to be provided to Development Group	

Enhanced Partnership Plan Headline Output		Enhanced Partnership Scheme Components	Lead	Lead Officer	Delivered no later than as stated in EP_Variation 1 dtd June 2022	Source of Funding	Estimated Cost of the Scheme £	Status of funding	Red	Amber	Green	Actions	Comments
16.3.Improvements to fares and ticketing Multi Operator Ticketing Schemes	Operation or Route requirements Placed on Operators	Review the removal of single operator products in most localised areas	Operators	Kevin Belfield (FIRST) Mathew Kitchen (Stagecoach) Mathew Cranwell (Stagecoach) Andrew Mcguiness(CPT)	30/09/22				R			Operators to undertake review individually and report back to Development Group	Variation No 2 proposed to temporarily suspend until impact of Government's £2 flat single fare from 2023 is understood
17.3.Improvements to fares and ticketing Multi Operator Ticketing Schemes	Operation or Route requirements Placed on Operators	Review premium levels on multi operator ticket products	Operators	Kevin Belfield (FIRST) Mathew Kitchen (Stagecoach) Mathew Cranwell (Stagecoach) Andrew Mcguiness(CPT)	30/09/22				R			Operators to undertake review individually and report back to Development Group	Variation No 2 proposed to temporarily suspend until impact of Government's £2 flat single fare from 2023 is understood
18.3.Improvements to fares and ticketing Multi Operator Ticketing Schemes	Operation or Route requirements Placed on Operators	Price rises limited to once a year	Operators	Kevin Belfield (FIRST) Mathew Kitchen (Stagecoach) Mathew Cranwell (Stagecoach) Andrew Mcguiness(CPT)	30/09/22	-		-			G	Completed.	Operating Group agreed price rises once a year in January except 2023 when may be March in line with rail industry.
19.4.Higher Specification buses	Measures provided by SYMCA/LHA	Procurement of up to 27 electric buses and provision of charging infrastructure at interchanges, on-street and at depots,	SYMCA	Adam Midgley	31/03/24	ZEBRA		Funded			G		FBC approved. Implementation stage , procurement of vehicles InProgress
20.4.Higher Specification buses	Measures provided by SYMCA/LHA	Upgrade part of SY community transport fleet to electric vehicles, with charging facilities at selected depots	SYMCA	Adam Midgley	30/12/23	Gainshare & ITB		Funded		A		Project Manager developing a SYMCA full business case for Jan 23 MCA approval.	Targeting January MCA for FBC.
21.4.Higher Specification buses	Measures provided by SYMCA/LHA	Electric bus trial in Doncaster	DMBC	Neil Firth	31/03/24	Gainshare		Funded		A		Need to agree specification and service/route and report back to Development Group	Discussions held at EP Development Group on 7th September, Operators asked for the Expression of Interest of EV buses, LAs, SYMCA Officers and Operators to consider further routes
22.5. Improvements to passenger engagement	Measures provided by SYMCA/LHA	Implement an agreed new Customer Charter to apply across the whole network	SYMCA	Tim Taylor	30/09/22	-		-			G		Variation No 2 proposed to amend wording, to enable the EP Forum to start developing the charter at its first meeting on 28th September 2022
23.5. Improvements to passenger engagement	Measures provided by SYMCA/LHA	Develop new forum for passenger representation, to include bus user groups, representatives of disabled people and local business groups	SYMCA	Jonathan Spruce	30/06/22	-		-			G	Completed.	Meeting held on 28th September 2022.
24.5. Improvements to passenger engagement	Operation or Route requirements Placed on Operators	Service changes to be limited to twice per year	Operators	Kevin Belfield (FIRST) Mathew Kitchen (Stagecoach) Mathew Cranwell (Stagecoach) Andrew Mcguiness(CPT)	30/09/22	-		-			G	Completed.	Date agreed (First Sunday after Easter/Last Sunday before School starts)
25.6. Strong network identity	Facilities provided by SYMCA/LHA	Installation of at least 117 new shelters	SYMCA	Steve Mumford	31/03/23	Gainshare		Funded			G		On programme for delivery. Ordered 148 shelters.
26.6. Strong network identity	Measures provided by SYMCA/LHA	Extend the 'Safe Places' scheme to cover the whole network	SYMCA	Tim Taylor	31/03/23					A			Discussed at EP Operational Group and Operators have been asked to bring their proposals for future Operational group.
27.6. Strong network identity	Operation or Route requirements Placed on Operators	Implement the 'Safe Places' scheme on-board buses	Operators	Kevin Belfield (FIRST) Mathew Kitchen (Stagecoach) Mathew Cranwell (Stagecoach) Andrew Mcguiness(CPT)	31/03/23					A		Related to task above	
28.6. Strong network identity	Measures provided by SYMCA/LHA	Implementation of a common branding across South Yorkshire transport network	SYMCA	Jordan Kemp	31/03/23			Explore Funding		A		Work in progress	Paper presented to EP Development Group on 6th September 2022 and requested for the budget .
29.6. Strong network identity	Operation or Route requirements Placed on Operators	Support the implementation of a common branding across SY transport network	Operators	Kevin Belfield (FIRST) Mathew Kitchen (Stagecoach) Mathew Cranwell (Stagecoach) Andrew Mcguiness(CPT)	31/03/23					A			