Transport for CCR

Cardiff Capital Region

Transport for CCR

Regional Transport Plan: Case for Change

4 July 2024

Prifddinas Ranbarth Caerdydd | Cardiff Capital Region

Issue/Revision	First Issue	Revision 1	Revision 2	Revision 3
Remarks	First draft for briefing and discussion with RTSC & Officers	Second draft for recommendation to SEWCJC by RTSC		
Date	20/6/2024	4/7/2024		
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File reference	CCR_RTP_CFC _v1.0	CCR_RTP_CFC _v2.0		

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1. Introduction

Establishing the case for change is the first step in the development of the Cardiff Capital Region (CCR) Regional Transport Plan (RTP); its purpose is to set the scene of the region and provide justification as to 'why something needs to be done and what it should achieve'.[1]

More than this, this document aims to make clear how regional transport will play a critical role in enhancing the lives of our people, through fostering a regional economy that is bigger, fairer and greener, generating good growth and creating the conditions for shared prosperity across the ten local authorities that make up our region.

Transport for CCR puts forward the bold ambition of our region and the determination to align and leverage the new statutory powers of Corporate Joint Committees (CJCs) - economic wellbeing, spatial planning and regional transport. It articulates what is unique about our region – its people and the place – and the distinct challenges we face in driving productivity, inclusivity and sustainability.

In the post-pandemic period, patterns of travel and transit continue to change, directly influencing the way transport is delivered. Consumer demands and lifestyle changes are evolving in tandem, with technology advances enabling new tools and business models. Even given this, transport remains one of the largest sources of carbon emissions and is an inhibitor to our regional and national net zero goals.

CCR must work towards a transit system that enables the mobility of citizens, good and services through a Competitive, Connected and Resilient network that is cost-effective, accessible and focuses as much on bringing people together, as it does on moving them around. The transport network of the future must drive towards net zero, be digitally enabled, resilient and sustainable.

This case for change outlines the challenges and opportunities that confront the transport sector in the region. The CJC model and further regional devolution has the potential to deliver the investment models that will unlock growth in the transport network and provide sustainable financing.

Transport for CCR puts forward a set of candidate objectives that can be used as the basis for further consultation with stakeholders and, critically, the people of South East Wales. Understanding the enablers that will drive delivery - from innovation to investment – we recognise that partnership working will be critical to deliver economic growth, societal benefits and sustainability gains.

[1] Welsh Transport Appraisal Guidance (WelTAG) (gov.wales), p. 26

Notes

Transport for CCR has been developed in accordance with Welsh Government (WG) Guidance[2] to ensure that the RTP supports the vision and ambition of Llwybr Newydd - The Wales Transport Strategy, 2021 (WTS). Whilst the duty to produce the RTP sits with the South East Wales Corporate Joint Committee (SEWCJC), local authorities of the region will be responsible for its delivery.

The RTP therefore needs to be informed by a robust evidence base so that its policies support the delivery of the WTS at local and regional levels and provides a strategic framework for local authorities to deliver within. Where relevant, Transport for CCR makes reference to the WTS Monitoring Measures and Data.

A wide range of data sources have informed this report; including Census 2021, Welsh Index of Multiple Deprivation (WIMD 2019), datasets provided by Transport for Wales (TfW), Future Wales 2040, WTS, and other key plans and strategies at the national, regional, and local levels.

[2] www.gov.wales/regional-transport-plans-guidance-corporate-joint-committees

2. Policy Context

2.1 Our Ambition - a Competitive, Connected, Resilient Region

Cardiff Capital Region (CCR) has been working successfully as a partnership of the ten local authorities of South East Wales through the City Deal – a £1.2bn programme covering innovation, infrastructure, skills and challenge.

On 2 April 2024, CCR City Deal became part of the SEWCJC, a new type of statutory regional public body in Wales. We are still known as CCR, ensuring we build on the collaborative work and reputation already in place, but SEWCJC is our legal name.

CCR represents the joint commitment made up of the ten local authorities of South East Wales, the UK Government and Welsh Government, to build on the region's sectoral strengths, high skill base and three successful universities.

The Regional Economic & Industrial Plan (REIP) (2023-28) sets out our ambition to be, "a proud region where everyone is connected locally and globally, enjoying work, business and life opportunities that make us the place to fulfil potential".

CCR takes a comprehensive approach to achieving the strategic goals of being a more **Competitive, Connected and Resilient** region – from the focus on clusters; Research and Innovation; to green investment plans; infrastructure that connects within and across our places; and an emphasis on increasing our workforce size and quality and demand-driven skills. Liveability and productivity are hallmarks of CCR, and we believe this can be achieved through greater devolution and support for regional economic leadership.

The focused goals detailed below respond directly to each of the missions highlighted in the REIP – tackling economic disparity & boosting growth; improving physical & digital infrastructure; enhancing innovation capability & capacity; and, decarbonising our environment by 2050. Responding to the climate challenge is at the core of our approach and runs through each of our strategic goals, ensuring focus on the green economy; sustainable housing and transport; and energy security.

Our Strategic Goals

A Competitive Region

Enabling businesses within our priority sectors to achieve higher levels of productivity through innovation-led growth

If the regional economy is to thrive in the longer-term, our business sector will need to compete successfully in the marketplace, both nationally and internationally. We will focus on increasing regional productive capacity through an economy that specialises in high quality products that customers value, produced by a highly skilled and well-rewarded workforce. Our focus on innovation-led growth and economic strengths will not stop at the northern perimeter of the M4 corridor. To be a truly competitive region, innovation impact must be diffused and dispersed with a focus on innovation across tradeable and everyday economies, public services and challenge-led engagement with civic society.

A Connected Region

Invest in cutting-edge digital and physical infrastructure and grow the green economy

In addition to regional improvements to transport through the Metro scheme, continuous targeted investments and interventions will be made to utilise existing physical infrastructure assets across the region, harnessing local supply chains and resources so that all in CCR benefit.

Initiatives centred around the digital infrastructure of the region will revolutionise the digital capability of CCR, increasing productivity, efficiency, innovation-led growth and most importantly, connect the region's most valuable assets - its citizens.

A Resilient Region

Maximise 'good growth' by ensuring prosperity is shared and spread across the Region and take direct steps to reduce inequality

The region must have the conditions where our businesses and our people are best equipped to embrace the future, making a resilient region that can adapt, improvise, and overcome periods of economic turbulence or social unrest.

Commercially viable, well-paid jobs delivered by a competitive, better-connected economy, allied to improvements in fairness and inclusion, will help deliver social resilience. Appropriate training and skills, from support and foundational services, through to occupations found in the commercial clusters, will also be essential.

CCR is committed to the strategic goals of being more competitive, connected, and resilient; and the REIP Delivery Plan highlights the specific programmes, projects and activities that underwrite delivery against those goals.

2.2 Opportunity of the CJC Policy Context

In June 2022, the requirement for local authorities to produce a Local Transport Plan (LTP) was transferred to the four regional CJCs by the Local Government and Elections (Wales) Act 2021. The Act established four CJCs in Wales: North, Mid, South West and South East Wales.

The Act responded to the need for a strategic approach to both land-use and transport planning, working in a more joined-up regional way than has previously been achieved, and aligned tightly to ambitions around economic development.

To that end, CJCs are required via statutory instrument to promote economic wellbeing, spatial planning and regional transport planning. The Act states that the CJCs will support the integration of transport and land use planning through their three broad functions, which are to prepare:

- Regional Economic Framework (in CCR's case, this is reflected in the REIP);
- Strategic Development Plan (SDPs); and
- Regional Transport Plan (RTPs).

Through the recent transition to this new form of regional public body, we have a unique opportunity to develop transformational regional policy & interventions. This will be achieved

through achieving connectivity across economic well-being, spatial planning and transport, to ensure we leverage their potential.

Our focus on placemaking and driving inclusive growth in the region depends on being able to create symbiosis between the new statutory powers, and CCR has designed its architecture of strategies and plans to achieve this. The diagram below shows how this is being achieved within the CCR.

Figure 1: Alignment of regional and organisation plans

The statutory guidance for CJCs (published on 25 January 2022), recognises the concurrence of economic wellbeing duties, where constituent councils and CJCs have broadly the same powers. In this case, the CJC, “would seek to agree a process with its constituent councils that sets out how the exercise of concurrent functions will be managed.”

However, for the non-concurrent powers of strategic spatial planning and regional transport planning, the “delivery of functions at the local level will be dependent on the decisions made regionally by CJCs; that is in terms of the nature of the decision and the timing of when decisions are made”.

The guidance focused on the statutory and constitutional arrangements for CJCs, as opposed to specific detail on the functions to be exercised. To that end, CCR is required to develop both an RTP and SDP following the publication of separate guidance specifically for these non-concurrent duties.

As transport is a key element in placemaking, it is also important that the RTP and SDP are closely aligned. However, the first iteration of the SDP is not due to be developed within the timescale of the first RTP. It is likely that the first iteration of RTP will not be able to fully take into account strategic development planning but should establish mechanisms by which this can be achieved moving forward.

2.3 Aligning to the Wales Transport Strategy (WTS)

WG's RTP Guidance reinforces the requirement for RTPs to include policies that support the vision and ambition of Llwybr Newydd - The Wales Transport Strategy, 2021 (WTS). A number of key points, including a firm focus on modal shift, draw on existing analysis that includes the work of TfW; and follow the five ways of working as set out in the Well- being of Future Generations (WBFG) (Wales) Act 2015, which must be taken into account when preparing the RTP.

The WTS sets out WG's vision to 'provide an accessible, sustainable and efficient transport system that is fit for future generations and places people and tackling climate change at the heart of decision making'.

The RTP for our region will align tightly with the WTS long-term ambitions and supporting objectives - these are to deliver a transport system that is good for:

- *people and communities (equality, health, and safety and confidence);*
- *the environment (transport emissions, biodiversity and waste);*
- *places and the economy (place making and innovation) and*
- *culture and the Welsh Language.*

For CJCs, the delivery mechanisms to realise these ambitions are the RTPs and the Regional Transport Delivery Plan (RTDPs).

The WTS also commits to developing four delivery pathways including decarbonisation, equality, integrated journey planning and rural offer. It is intended to list specific commitments and map out the pathway for delivery for each, reporting to a Transport Performance Board. The CCR RTP must account for this when preparing its RTP and RTDP.

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3. About Our Region

3.1. Distinctive Place & Identity

The geography of South East Wales is diverse - its settlement patterns influenced by ironworking, coal mining and steel production, its industrial past has shaped its communities, while the rich natural beauty of the physical landscape provides opportunities and challenges. This blend of features gives South East Wales its distinctive sense of identity.

CCR is Wales most urbanised region and home to approximately half of the population with over 1.5 million people. Although it is the most populous region of Wales, it is the smallest geographically, covering an area of 2,809 km². Besides embracing the capital city of Cardiff, the region also includes the following local authorities - Blaenau Gwent, Bridgend, Caerphilly, Merthyr Tydfil, Monmouthshire, Newport, Rhondda Cynon Taf, Torfaen and the Vale of Glamorgan.

Cardiff remains the largest authority in the region, however, unlike most other City Regions in the UK, a number of other authorities make up a significant proportion of the population, including Bridgend, Caerphilly, Newport and Rhondda Cynon Taf. As a result, it is a diverse region comprising the two cities, a range of market towns, the industrial heartland of the South Wales Valleys, rural communities and a coastal belt; this uniqueness results in over 75% of the population residing outside of Cardiff.

The region's distinctive mix of heavily urbanised and rural areas results in Cardiff being the most densely populated local authority, with 2,553 people per square kilometre (or around 18 people per football pitch)[3] and Monmouthshire having a particularly rural population of around 110 people to each square kilometre (equivalent to around one football pitch per resident).[4]

Each area has its own strengths and challenges in relation to their social, economic, environmental and cultural experiences, and the transport network plays a key role in this respect as the trunk roads, main roads and railways are prominent features in the landscape.

The 2021 Census data provides an insight into the population trends of the ten CCR local authorities. Newport saw the highest level of growth with a 9.1% increase, this was also the highest population increase across Wales as a whole. In contrast, Blaenau Gwent's population fell by 4.3% over the same period. The latest mid-year estimates for 2022 indicate that the region's population has increased by 18,200 people since the 2021 census.[5]

More than one in five people (21.3%) across Wales are over 65 years old. Monmouthshire and Vale of Glamorgan have seen the largest increases in the number of residents in this age group, with 26% and 24.9% respectively between 2011 and 2021. These are 2 of the 8 local authority areas in Wales where the total number of people aged 65 years and over has increased by 20% or more between 2011 and 2021.

In comparison, the population aged under 15 years increased the most in Newport, rising by 10.2%, compared with an increase of 5.3% in Cardiff during the same period. Monmouthshire

[3] www.ons.gov.uk
[4] www.ons.gov.uk
[5] Population estimates by local authority, region and age (gov.wales)

saw its population of this age group decrease by 8.6%, which is the third largest percentage decrease across Wales. Blaenau Gwent and Caerphilly have seen a significant reduction in the young and working age population.

The Census 2021 data also shows that 95% of the total population growth of Wales has been concentrated in just four South East Wales local authorities – Cardiff, Bridgend, Newport, and the Vale of Glamorgan. These are among the most prosperous parts of Wales and their economic strength is important in attracting and retaining working-age people.

There is a recognised need to maintain a healthy balance between younger people, those of working age and those who are retired within a given area. This helps support sustainable communities by ensuring there are enough current and future economically active residents to support local employers and the economic viability of an area, as well as help maintain infrastructure, education and health services, commercial and leisure facilities to support the retention of existing residents and attract new working-age people.

Population within some areas of South East Wales are projected to increase. Newport, Bridgend, Cardiff, Caerphilly and Rhondda Cynon Taf are all projected to have larger populations by 2039.

3.2. Addressing Inequality

As highlighted in CCR's Strategic Equality Plan, a core ambition for CCR is a region where all citizens have the opportunity to realise their full potential. The ability for people to work, learn, live healthy lives, and enjoy the natural, social and cultural attributes that the region has to offer, varies considerably in various parts of the region.

There are many interconnected societal issues that need to be addressed to help ‘move the dial’ on equality in the CCR. Transport can help to do this. The ambition of regional transport is to have an efficient transport network that allows all people the freedom to travel to suit their needs and wants, which is essential if our goals are to be met.

Our region’s story is one of mixed fortunes. Gross Value Added (GVA) in Cardiff and the Vale of Glamorgan has increased to 97.5% of the UK average, in stark contrast to parts of the Northern Valleys, where GVA is just 53% of the UK average. Even within the more dominant economies of the M4 corridor, however, there are significant challenges around the distribution of wealth and opportunity. Poverty is recognised as the ‘single major challenge for Wales in the Auditor General’s ‘Time for Change’ - Poverty in Wales’ report in 2022 and is a stark challenge in parts of the region. Research commissioned by the Bevan Foundation and the Wales Child Poverty Eradication Network shows that the highest rate of child poverty nationally is in Blaenau Gwent (30.3%), while six of Wales ten most deprived areas are located in CCR local authorities.

Further, the employment rates per local area and gender remained consistently below the UK average across both 2019 and 2023, with the percentage of people living in households of material deprivation varies widely across the ten local authority areas. In 2022-23, Rhondda Cynon Taf had 20% of citizens living in households of material deprivation, the 2nd highest in Wales, conversely Monmouthshire had 8%, which is the lowest rate in Wales. Despite these statistics, we understand that these figures, when viewed in isolation, can distract from hyper-local inequality which is far more nuanced, and is demonstrated through the Multiple Deprivation Index, for example the challenges facing Cardiff’s Southern Arc of overall deprivation.

This varied picture continues when we look at measures such as Gross Disposable Household Income per head, with Vale of Glamorgan having an average of £21,923 in 2021, in comparison to Blaenau Gwent's average of £14,884. Having access to higher levels of disposable income plays a key role in enabling people to access transport, and broaden their career and life opportunities, for example engaging in additional social activities, which has a direct impact on mental health, well-being and overall life satisfaction.

The geography of our region and challenges around physical connectivity play a part in socio-economic disparity. The spill-over effects of growth sectors and infrastructure improvements can increase accessibility to economic benefits, but our approach has been to not rely on this, because benefits do not always accrue equally across the region.

Instead, CCR has preferred to recognise the relative independence of micro-economies across the region, delivering a strategy that ensures all places realise direct and tangible benefits.

CCR's REIP 2023-2028 outlines how we will:

- Tackle the specific challenges associated with those areas experiencing declining populations;
- Stimulate the economy and encourage more people of working age to stay and return to the region;
- Attract a range of companies and increase productive capacity by growing the employment base in key competitive clusters;
- Reinforce the important partnerships forged across local political and business leadership; and
- Focus on liveability and inclusivity, as well as productivity.

CCR has to be focused on what it takes to 'move the needle' economically and socially, recognising this will not be a quick fix. The UK Government Gateway Review of City Deal in 2020 and subsequent Mid Term Review in 2024 validated our long-term approach to raising productivity, predicated on high value-added sectors and innovation-led inclusive growth. It is therefore right that the CCR's REIP, as well as our RTP, recognise the economic changes taking effect - providing clarity about what 'good growth' looks like for CCR and our need to be dually focused on tackling economic disparities, as well as boosting regional economic growth.

The CCR Strategic Equality Plan specifically identifies the alignment of the statutory powers as an enabler for social mobility and to improve wellbeing as a regional objective. The potential outcome of this joined-up regional approach to inclusive travel and site development, helping to reduce in-region economic disparities.

South East Wales is at the forefront of Compound Semiconductors development, with a world leading cluster emerging in the region. Pioneering companies such as IQE are already well established here, working closely with Cardiff University in the Compound Semiconductor Centre. CCR has supported the industry with a £38m investment in a manufacturing facility, the Compound Semiconductor Foundry, at Newport, ensuring that manufacturing of the semiconductors, and the jobs that go with it, is not offshored. Improving the efficiency, reliability and sustainability of the movement of people and goods to this development cluster in Newport are at the forefront of driving forward the growth of the region's innovative economy.

3.3 Driving Sustainability

There is consensus across CCR that a huge transformation is needed, at pace and scale, in the way in which energy is generated, transported and utilised. This shift is needed in order to meet UK net zero carbon targets by 2050, enhance the health and wellbeing of our citizens, support a just transition to a clean growth economy, and protect the environment for future generations.

The scale of the challenge is already apparent, with the current carbon intensity of South Wales being circa 317 grams of carbon dioxide equivalent produced per kilowatt-hour of electricity generated, making it the worst performing region in the UK. Under a Business-as-Usual scenario, CCR is expected to achieve only 26% decarbonisation by 2035 (less than half of the 55% needed to be on track for net-zero), and our ambition and actions need to urgently rectify this.

To meet the targets, CCR needs to reduce emissions from its energy system by 55% by 2035, split by sector as follows:

- 51% reduction in domestic heat and power emissions;
- 54% reduction in commercial and industrial emissions; and
- 60% reduction in road transport emissions.

The Welsh Government Energy Service (WGES) has worked with the CCR region to create a CCR Energy Vision and Strategy with the help of over 100 key stakeholders. The strategy considered the 'business as usual' decarbonisation pathway alongside a detailed future scenario, to put the region on a pathway to achieve net zero by 2050. The options and choices are stark and there are no neutral decisions.

Our vision for CCR, approved by Regional Cabinet on 19th December 2019 is:

To create the conditions for a transition to a carbon neutral economy and society in the CCR, using low carbon energy as an enabler of economic regeneration, growing our regional income whilst maintaining guardianship of our environment through a laser-focus on clean growth.

CCR's REIP recognises the urgent need for intervention and collective action. The need to address the deep challenges presented by climate change is stark and evident, placing a great responsibility on CCR to play a role in the national goal of 100% decarbonisation by 2050.

The interlinked challenges of climate, historic low growth-productivity and the post-COVID economic recovery, make for a real opportunity for CCR to play a distinctive role in the radical shifts and transformations required. This must build upon the region's unique natural energy generating assets and use of the strength of our existing manufacturing base as a springboard for a transition to a hydrogen economy, with the creation of multiple Clean Growth hubs.

Local Area Energy Plans (LAEPs)

CCR are currently collating LAEPs for the region. The LAEP will set out the change required to transition an area's energy system to Net Zero in a given timeframe. This is achieved by exploring potential pathways that consider a range of technologies and scenarios, and when combined with stakeholder engagement, leads to the identification of the most cost-effective preferred pathway and a sequenced plan of proposed actions to achieving CCR's Net Zero goal.

Once complete the plans will comprise a route map, action plan, technical report and a regional energy plan prospectus describing the actions required over the next five years to meet future

energy demand by the different renewable energy sources and technologies. This work will significantly help inform opportunities for renewable and sustainable transport across the region over the next 5 years.

CCR has already begun delivering against the CCR Ultra Low Emission Vehicle (ULEV) Strategy and One Planet Framework which includes regional work programmes, such as, bus charging infrastructure, e-bikes, public charging infrastructure, feasibility studies e.g., regional car clubs, hydrogen storage, smart-grids, and fleet review.

Further work includes both detailed analysis of grid constraints and opportunities working with Western Power, aligning the project proposals to work streams on energy efficiency, renewable electricity, fleet decarbonisation and hydrogen (working with Wales and West Utilities). All these projects are a step in the right direction, but a significant increase in scale and volume of interventions and investment is required to deliver these aspirations.

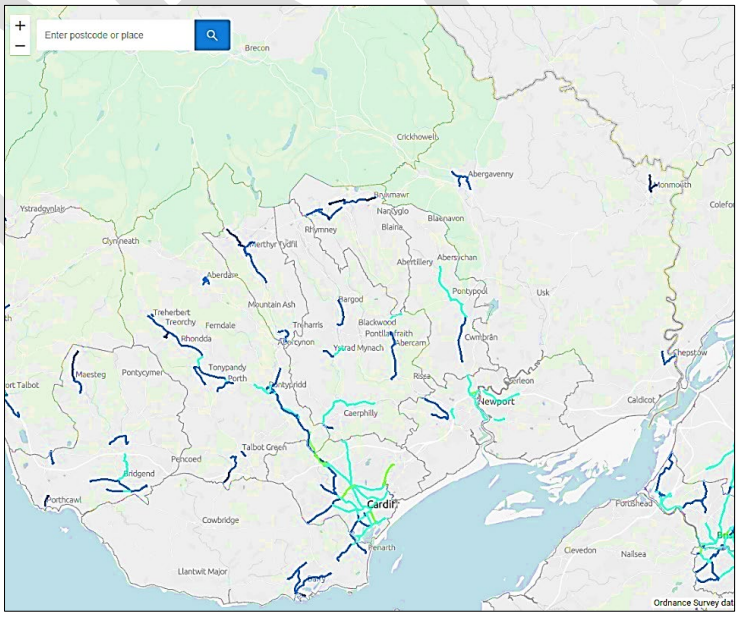
3.4 Impact of Transport on Environment

The significant impact that transport has on the environment is widely recognised, particularly in terms of air pollution, noise pollution and greenhouse gas emissions.

Greenhouse gas emissions from the transport sector are one of the WTS Key Monitoring Measures. In 2021, the domestic transport sector produced 14.9% (5,421 kilotonnes of carbon dioxide equivalent) of Wales total KtCO2e.[6] Cars have consistently accounted for the majority of emissions.

Figure 2 shows the levels of roadside nitrogen dioxide across the region which reflects the high traffic volumes along large stretches of the strategic highway network, with levels increasing around known congestion hotspots.

Figure 2: Levels of roadside nitrogen dioxide



Source: UK Ambient Air Quality Interactive Map (defra.gov.uk)

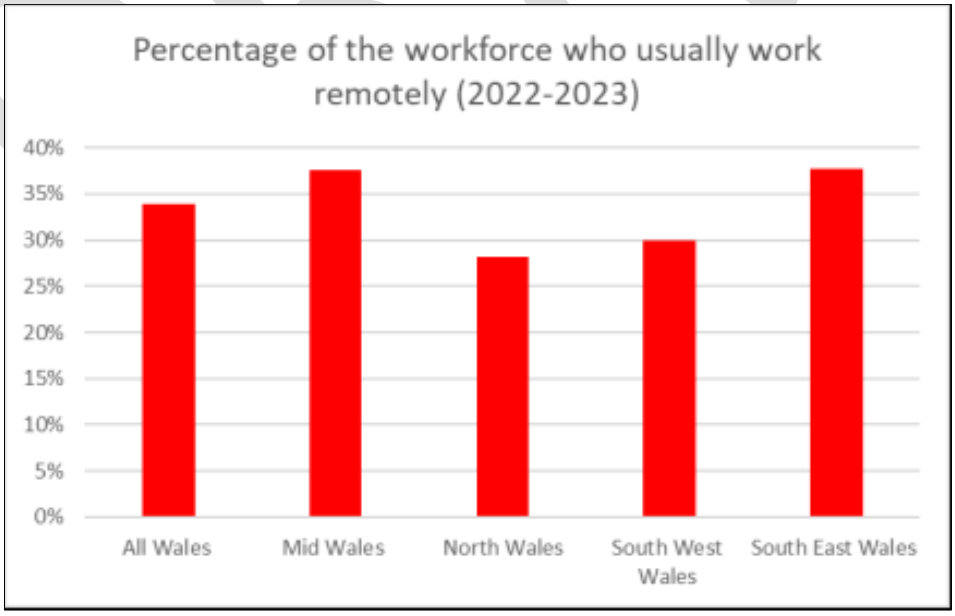
3.5 Travel Behaviours

The 2021 Census was undertaken during the COVID pandemic, which is likely to have a significant impact on the reliability of the current travel to work data, and particularly the percentage recorded as working from home. However, the 2021 data still provides the following insight into the levels of car use for commuting journeys within CCR:

- 62% travelled to work as either a car driver or passenger;
- Significant variations across the region with nearly 80% in Blaenau Gwent and 65-69% in the other valley authorities, compared to just 40% in Cardiff, reflecting the limited proximity to employment opportunities in the valley authorities, and the ease of being able to access employment by public transport in Cardiff;
- Only 1.2% travelled to work by train and 2.3.% by bus. Cardiff had the highest proportion of people traveling to work by bus (4.7%), reflecting the availability and frequency of services in the county;
- 6.4% walked to work, which was slightly lower than Wales as a whole. 9.6% of people living in Cardiff walked to work, reflecting the availability of employment within close proximity in the county; and
- The proportion of sustainable travel to work trips diminishes with the distance of commuting.

More recent data, as presented in Figure 3, shows that in 2022-23 over a third of people worked from home in the region, which was higher than the figure across Wales as a whole (25.6%). This is one of the key monitoring measures of the WTS and is linked to the WG target of having 30% of the workforce working remotely on a regular basis. These results may reflect the greater flexibility in working patterns due to COVID-19.

Figure 3: Percentage of the workforce who usually work remotely (2022-2023)



3.6 Inter-Regional and Cross-Border Connectivity

There is a close relationship between the region and the West of England, with the Severn Crossings playing a key role in connecting South Wales to the rest of the UK. There are significant commuting flows, particularly from Monmouthshire to the West of England, which has intensified due to the removal of the Severn Tolls in 2018.

Data shows that more journeys occur from Wales to England than from England to Wales which demonstrates the importance of the highway network and cross border movement for essential economic activities such as employment. Key trip movements are summarised below;

- In 2022, 7,565 trips took place from South East Wales to the South West of England (12% of all cross-border trips).
- In 2023 approximately 14,200 people commuted into the region from Mid and South West Wales. A further 10,400 people travelled into the region from England, with over half of these commuting in from the South West of England. [7]
- In 2022, 41% of all Welsh intra-regional trips were between South East Wales and South West Wales (12,272 trips). During the same period 3,764 trips were made to/from Mid Wales.

The relative proximity to a large populous English region offers opportunities that can support and benefit our region if strategically managed. This is of particular relevance to Monmouthshire where the increase in residential development across the border has had a negative impact on the operation of the County's highway. This is exacerbated by the limited motorway junctions which contribute to increased traffic on local roads, and limited use of M48 especially during peak travel times and congestion at key pinch points e.g., High Beech Roundabout, Chepstow.

The A465 already provides an important link between the north of the region and economic opportunities across the border. Completion of its dualling will make the Heads of the Valleys road more attractive to freight operators currently using the M4 to access South West Wales from the English Midlands and north of England, which in turn will help support the region's communities and the development of a stronger economy.

CCR forms part of the Western Gateway Partnership, which is the UK's first pan-regional powerhouse, bringing together leaders from two countries, stretching across South Wales and Western England. The partnership is working to power the UK's efforts to reach net zero whilst also providing opportunities to those at risk of being left behind. The partnership has five core missions, including:

• To overcome productivity challenges to add £34bn to the economy;
• Attract investment and increase exports by £4 billion;
• Decarbonise our economy;
• Better connect communities – digitally and through transport; and
• Support our innovation.

Work to improve historic issues with transport is key to overcoming productivity challenges, decarbonising our economy and levelling up communities through improving connections to jobs, education and opportunity among much else.

[7] Detailed commuting patterns in Wales by Welsh local authority (gov.wales)

4. Transport Challenges & Opportunities

4.1 Overview

Better transport and improved connectivity are critical to the future success of the CCR.

The ten local authorities that form CCR have extensive responsibilities for providing transport services across the region. The assets extend to approximately:

- 9,000 miles of the local and strategic road network, including an element of unadopted roads, supporting over 13bn vehicle kilometres of travel every year
- 10,000 miles of footways
- 800 traffic signal-controlled junctions and controlled pedestrian crossings
- 170,000 streetlights
- 6,000 highways structures (bridges, retaining walls, culverts, etc)
- 24 rail and bus park & ride sites with nearly 2,500 spaces
- 20 bus stations and almost 9,500 bus stops.

They manage the largest asset group in the public sector; the highways and transportation network, and they historically planned and implemented strategies and programmes to enhance the current transport offer and develop new ways of working. The Gross Replacement Cost (GRC) information, collected in 2018/19 through the CSSW Highway Asset Management Project for the authorities in the CCR show the highway assets GRC as £12.2bn. If the land is included, the GRC increases to £21.6bn.

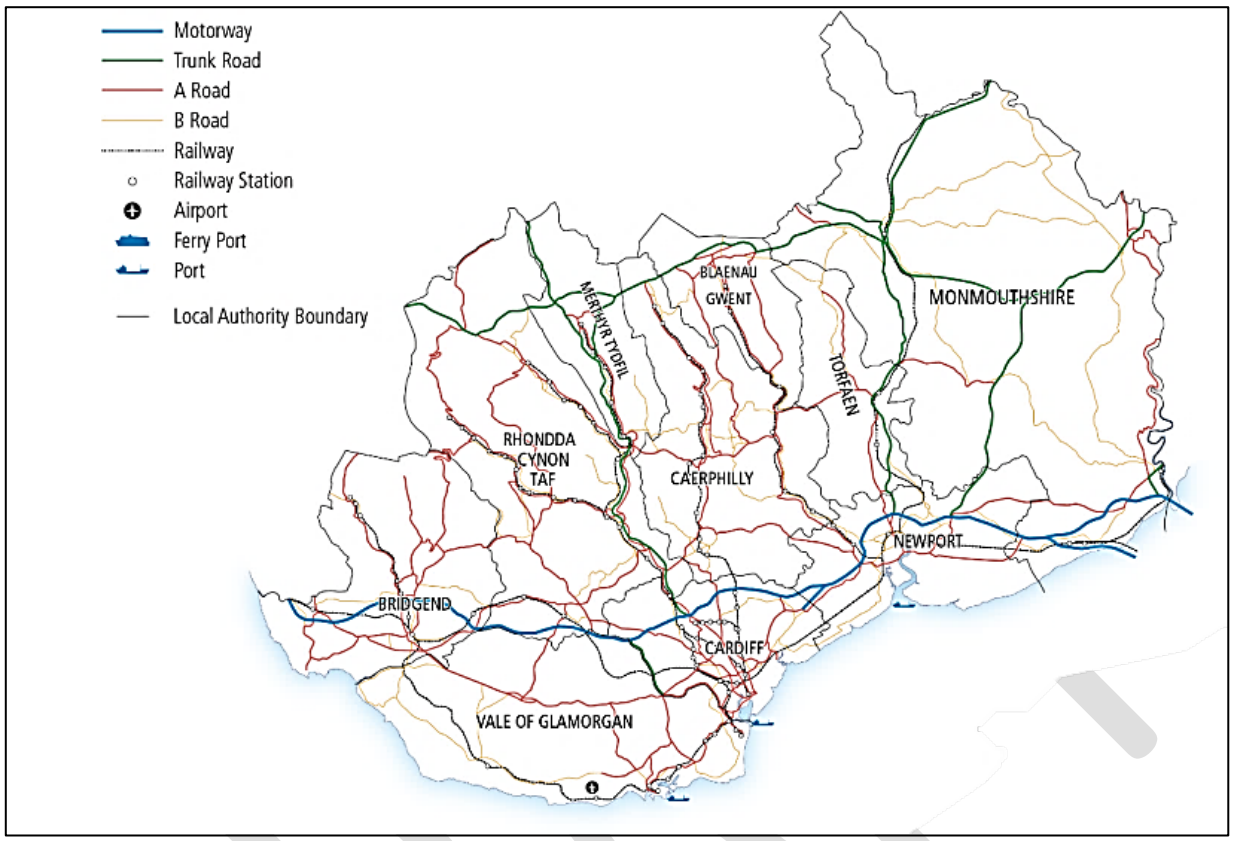
Enhancing transport connectivity with high quality and reliable infrastructure is important to drive regional prosperity. It will also be a key tool in our armoury in the race to net zero as we focus our collective efforts to rapidly combat climate change. Economic development and transport connectivity have a complimentary relationship with an efficient transport system facilitating regional inclusive growth.

The CJC will support and help grow the tourism economy of the region by working with TfW and Cardiff Airport to focus on route development as well as wider transport connectivity priorities. Ensuring that visitors have good sustainable transport connections to the region's environmental/landscape, cultural, heritage, adventure/activity offering, and world-class events will be instrumental in growing tourism for the good of the region and Wales as a whole. Ongoing engagement with organisations such as the National Museum Wales and landscape management body- the Brecon Beacons National Park Authority will be needed to develop creative ways to enhance the visitor experience.

Further to this is the need for CCR to make transport emission savings of 1606kt CO2, taking the region from total emissions of 2662kt CO2 to 1056kt CO2, a saving of 60%. To contribute towards this target, strategic transport planning must prioritise the enabling of a modal shift.

As well as managing the highway asset and bus infrastructure including bus stops, stations and bus priority measures, local authorities also procure hundreds of public bus service contracts; issue concessionary bus passes (including companion passes for eligible persons), administer funding for concessionary bus schemes and bus services operational support, accounting for in excess of £60m of public funding.

Figure 4: CCR Transport Network



Therefore, the overarching high-level challenges and opportunities for our transport network in the CCR are captured below.

Challenges	Opportunities
Ever reducing budgets to manage the assets of the highway network.	Attract private investment through aligning transport provision with strategic development opportunities.
Changing travel patterns post Covid which has shifted the demand away from the commuter and more towards leisure travel, particularly around our coastal areas and trip attractors. Whilst the duration of peak congestion has reduced, there remain a number of existing and new congestion points, which affect journey time reliability including bus modes.	Build better through fairer and more equal provision across the region, taking into account travel demand and access to services and facilities for all. Consider opportunities to provide alternatives such as Park and Ride to intercept traffic.
Addressing climate change issues through the transport network, particularly as the CCR has such diverse transport requirements.	Provision of new green jobs, improving skills, supply chains and advanced opportunities through innovation, research and development. Where appropriate invest in highway infrastructure resilience, prioritising key public transport corridors.
Public behaviours and buy-in for a more sustainable network - how can we convince	Influence behaviours through sound vision, aims, objectives, policies, goals, ambitions

the public to make behavioural decisions that contribute to climate mitigation and reducing congestion?	and most importantly – provision of attractive and practical alternatives to private car use.
Meeting national mode share targets in a rural authority will be more challenging than in an urban equivalent, where mode shift to active travel and public transport are more achievable.	
Affordability and sustainability of providing public transport services and Home to School Transport is more challenging in rural parts of the region e.g., Monmouthshire, Vale of Glamorgan.	

4.2 Highways

Capacity

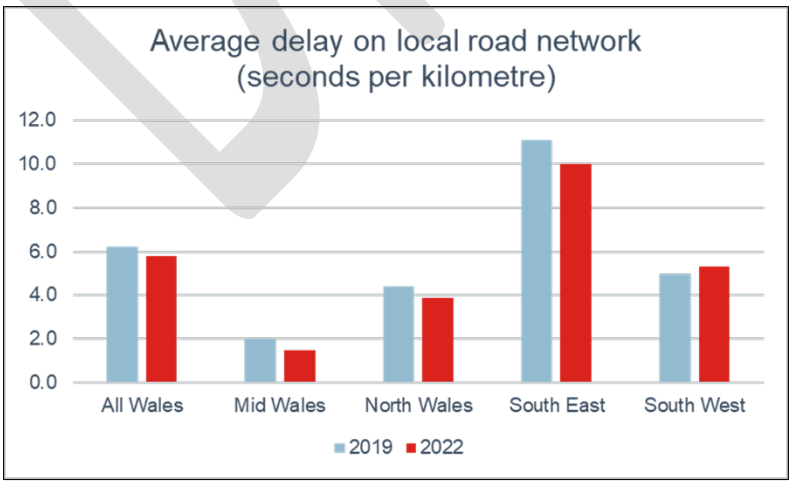
There are several locations on the region's road network where demand regularly exceeds the available capacity during peak periods, these include, but are not exclusive to:

- M4 westbound for 5 miles approaching the Brynglas Tunnels.
- A4232 NW-bound for 4 miles approaching the M4 at Cardiff West.
- A470 northbound for 4 miles approaching Nantgarw.
- A470 southbound for 4.5 miles approaching the northern edge of Cardiff.

Congestion on these routes has wide-reaching reliability impacts across a range of local and longer distance journeys, including freight movement. The region continues to experience the highest delay by far on the local road network (10.0 seconds per kilometre in 2022). This shows that the local highway network is performing at a level which causes significant delays, most likely caused by congestion hot spots linked to commuting trips.

Figure 5 shows a comparison of the average delay on the local road network, which is one of the WTS Subsidiary Monitoring Measures.

Figure 5: Average delay on local road network



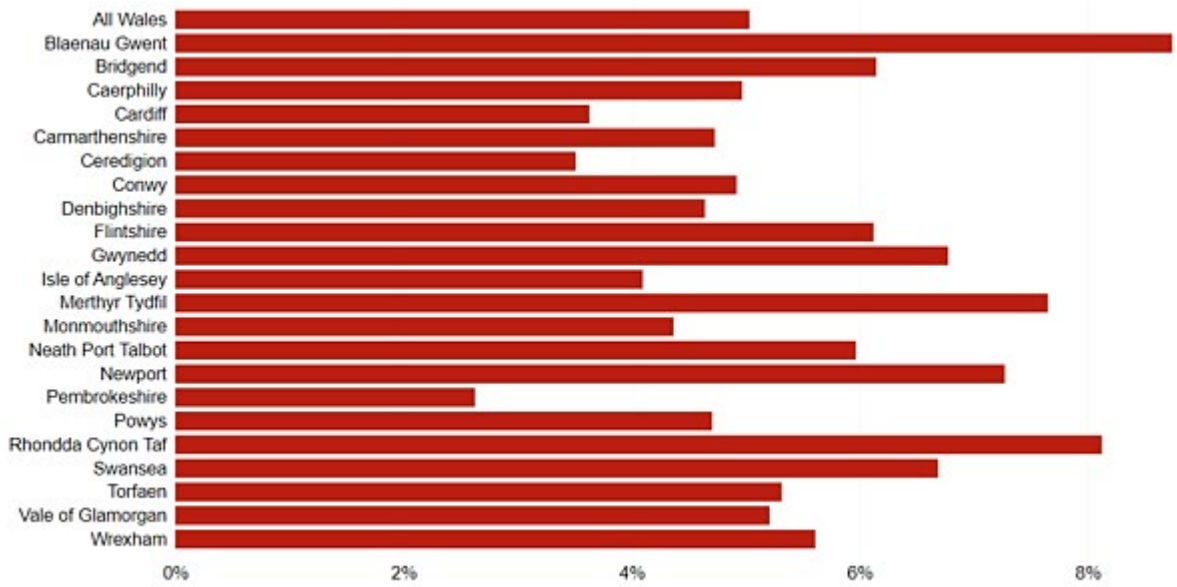
Challenges	Opportunities
Capacity & reliability issues on the highway network increases journey time variance, which reduces the efficiency of the network, including public transport and freight movements.	Improvements to the highway network capacity, reliability and performance would open up opportunities for investing in the region and growing the economy.
Detracts economic growth due to accessibility barriers, particularly on the M4, A470, and A4232 corridors.	Improvements to the public transport network, including park and ride, reduce the need to use cars, releasing capacity for public transport and freight movements. Future land use planning to support economic development in transport sustainable locations.
Inability to be competitive due to delays and poor performance of our road network, particularly in the areas identified, but not just exclusive to these areas.	Improvements to public and active travel to reduce the need to use private cars and free up capacity.
Transport to tourist destinations is heavily car based, leading to traffic and parking challenges, especially during peak seasons.	Provision of tourist focused park and ride services in key locations to intercept car-based trips that cannot be completed solely on public transport and / or active travel.
Impact of HGVs on local road networks; causing excessive noise and vibration when using small residential roads, getting stuck on narrow roads, causing traffic congestion on local roads, perceived and actual safety for other road users.	Identify innovative ways to address this challenge rather than adapting our roads to accommodate large vehicles e.g., work with industry/business to encourage the use of smaller delivery vehicles where feasible.

Road Resilience

As is the case across Wales, there are increased risks to the resilience of the transport network due to the impacts of climate change, which includes flood risk and overheating of the asset. For example, during February 2020, unprecedented weather brought severe flooding to Rhondda Cynon Taf, affecting people's homes, local businesses and public infrastructure. The percentage of transport infrastructure at risk of flooding is a WTS Subsidiary Monitoring Measure.

- 5.8% of the region's local road network is at high or medium risk of flooding, which is slightly higher than the proportion across Wales as a whole; and
- Blaenau Gwent has the largest share of local road networks at risk (8.7%), the highest in Wales, followed closely by Rhondda Cynon Taf with 8.1%.

Figure 6: Percentage of the local road network at high or medium risk of flooding (2023)



Weather extremes can have a major effect on the region's transport infrastructure in terms of cancelled rail and bus services and damage from flooding or landslips, as well as overheated rail track, and it is well documented that problems due to adverse weather, are likely to worsen in the future. This leaves us with a number of challenges to address through adaptation of our highway network, but also offers some opportunities as identified below.

Challenges	Opportunities
Flooding on the highway which then extends into homes and commercial properties.	Build/maintain using more sustainable materials which could have longevity, become cheaper and more reliable.
Flooding / overheating of the rail track causing cancellation of services.	Identifying innovative solutions through regional and UK-wide research networks and centres.
Surface condition of roads, bridges and footways has negative impacts on the mobility and safety of all road users. Uneven or degrading surfaces increase the risk of accidents and injuries for cyclists, pedestrians, and drivers and impede the efficient transportation of goods and people.	Identify and address areas in need of surface and structural repair to ensure the highway network is safe and efficient.

Air Quality Management Areas

The concentration of road traffic emissions has resulted in a number of areas in the region failing to meet the Government's national air quality objectives. There are 45 Air Quality Management Areas (AQMAs) in the CCR out of 53 across Wales as a whole. The local authorities with the highest number of AQMAs are Rhondda Cynon Taf (17), Newport (13) and Cardiff (7), reflecting the density of highway network and high traffic volumes in these areas. Further information related to these AQMAs is available at AQMAs interactive map (defra.gov.uk).

Long term exposure to air pollutants has been linked to serious health problems, including heart disease, cancer risks and respiratory diseases such as asthma in adults and children. Public Heath Wales (PHW) research demonstrates that 2,700 deaths each year are attributable to the exposure to carbon emissions. Engagement with PHW will provide further information regarding the impacts of road traffic on health, specifically in relation to asthma rates in the region.

Air pollution is not the only detrimental impact of road traffic. Noise is defined by PHW as unwanted or harmful sound and may occur in combination with air pollution. Exposure to environmental noise can cause health risks including cardiovascular disease, sleep disturbance, poor performance and learning, mental health problems, stress and reduced quality of life. The percentage of people regularly bothered by noise from outside the home caused by transport, is a WTS Monitoring Measure. Further information about the levels of noise from road traffic across the region is available at Environmental Noise Mapping 2022 | DataMapWales (gov.wales).

The uptake of low emissions vehicles will be important in working towards net zero. The percentage of vehicles that are ultra-low or zero emission is a key WTS Monitoring Measure and shows that ultra-low or zero emission vehicles accounted for a 1.1% total of road vehicles in Wales in 2022. This represents 1.3% of cars, 1% of buses and coaches, and 0.9% for taxis and private hire vehicles. Despite the low overall share of vehicles, data shows that ultra-low emission vehicles (ULEVs) have grown in number since 2013, with growth rates of 54% in 2020 and 81.1% in 2021.[8]

Since 2020, and due to market failure, CCR has entered into concession contracts to provide and manage up to 645 dual chargers across the region. These are made up of 7, 22 & 50kw chargers on public land, both car parks and on-street. Further provision is currently being made for schools, with a vision where the market will ultimately take over the funding, delivery and management of further provision as demand grows.

Further work is required in respect of planning guidance and working on the highway, to enable the market to provide the infrastructure on both private and public land in a timely and affordable manner. Despite the progress made to date by the CCR on charging infrastructure, there are still many challenges in decarbonising road vehicles, but there are also many opportunities to be realised as identified below.

Challenges	**Opportunities**
Reduce emissions that are harmful to people and the environment.	Opportunity to reduce health issues caused by harmful pollutants, therefore reducing the pressure on the NHS.
Reduce noise pollution.	Encourage active lifestyles, reducing obesity and ailments caused by inactivity
Address market failure in the provision of public charging infrastructure.	Introduce innovative solutions through new technologies and partnerships.
Change public attitude towards transitioning to cleaner transport modes, when they are not necessarily viewed as comparatively affordable timewise.	

[8] Key measure M2 | Transport for Wales (tfw.wales)

4.3 Rail

Our railway could be one of the most socially and economically valuable assets with untapped potential to make a larger contribution in Wales to people's lives, communities, environment and to our economy. Whilst WG, with funding from the CCR City Deal, has managed to take a significant step forward with the award and delivery of the Wales and Borders rail contract, the context for rail delivery in Wales is complex, fragmented and still underfunded.

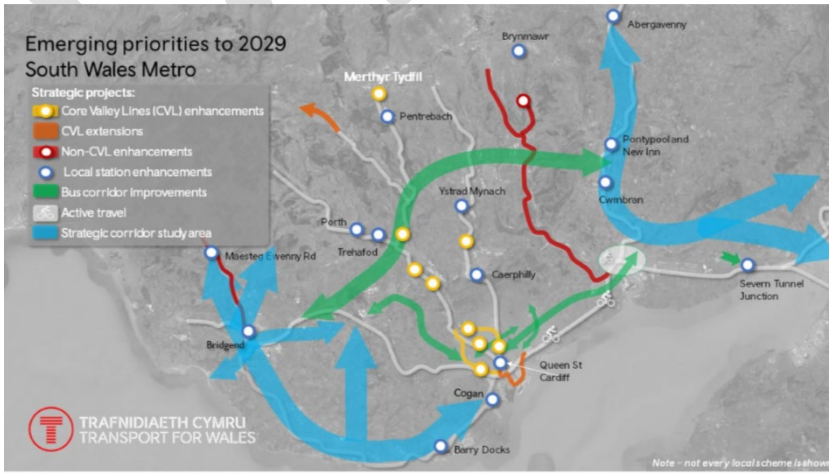
Despite Network Rail's route network in Wales having 11% of the total route length across Britain, serving 11% of the stations and containing 20% of the level crossings across England and Wales, only an average of around 2% of money spent on network enhancements across England and Wales since 2011 has been spent in Wales. This has left Wales behind. The lack of a fair share of rail enhancement funding means that our ability to meet our aims for economic development and the wellbeing of our future generations is impacted.

Proposals to expedite the improvement of links within the region, reduce congestion and connect people, are detailed in the CCR "Passenger Rail Vision" in 2021, with the aim of providing a public transport network that is a viable and desirable alternative to personal fossil fuel vehicle use. The electrification of the Core Valleys Lines is a significant milestone in the region's ambitions towards net-zero and the South Wales Metro will become the backbone in connecting the region and shaping its networks, enabling the advancement of other proposals by maximising and unlocking future potential offered by its development. The South Wales Metro is an important starting point – but collectively, we need to do more.

A functioning multi-modal transport system is critical to objectives to 'build back better' and improve our economic, health and societal outcomes. WG estimates that by 2040, 45% of journeys will be made on the public transport network or through active travel. As such, we want to ensure that we better utilise the existing transport network as well as delivering enhancements and new transport infrastructure that will improve the capability, capacity and reliability of the rail network, whilst also supporting the integration of rail with other modes of decarbonised travel, creating and offering sustainable travel choices for all.

Additionally, the Metro Plus programmes, delivered by the CCR local authorities, will be key in improving access to the rail network, allowing for an improved rail experience, and improved, integrated, and an overall more reliable access to onward travel, providing an end-to-end travel solution that allows for a multi-modal approach.

Figure 7: South Wales Metro: Emerging priorities and longer-term projects



Despite significant investment being made in rail provision since 2018, there are still significant challenges. However, with those challenges, also come opportunities as identified below.

Challenges	Opportunities
Inequity of funding across the rail network results in many line speeds in Wales being below the average for Britain as a whole.	Improve accessibility to rail transport and Improve connectivity through infrastructure enhancements to support increased line speed and the frequency of services, ensuring reliability and catering for growing passenger demand.
South East Wales Transport Commission (SEWTC) study has identified the urgent need to reduce congestion on the M4 and adopt a multi modal approach to transport delivery, including the provision of new stations on the South Wales Relief Line.	To support further sustainable enhancements and improvements to the Rail network to ensure it is accessible to all. Support the implementation of integrated, contactless ticketing with a zonal fare system for transparent and affordable pricing.
Insufficient network and station capacity in some key areas, including capacity limitations impacting on our ability to accommodate new stations and services - particularly on main lines, unacceptable limitations on the freight that can be moved by rail and a significantly lower proportion of journeys to work made by rail in Wales, due to disproportionate rail funding in Wales over decades.	To support a rail network that maximises and enhances existing infrastructure, improves connectivity, and acts as a catalyst for sustainable economic growth, and social inclusion, removes barriers to employment and improves tourism due to intercity express links & shorter travel times.
Rail is expensive and has performance issues – services to Bristol, Newport and Cardiff are often overcrowded.	Reduce the impact of the rail network on the environment, through supporting the delivery of Green Infrastructure, which will help to meet CCR Energy targets. Increase capacity through fleet investment.

4.4 Public Transport - Bus & Integration

Quality, affordability, and viability of bus services is a major challenge across CCR. Whilst the current legislation places the primary responsibility for planning and running bus services with the private sector, the public sector role is limited to interventions where there is an identified social need for a bus service that cannot be provided commercially. Prior to the Covid 19 pandemic, circa 70% of bus km operated in the region was provided on commercially registered services; however, this has reduced to 30% reflecting changes in lifestyle (primarily increased levels of home/hybrid working and increased use of online retail). As a result, there is an increase demand for Local Authorities to intervene and support services through Section 63 Powers in the 1985 Transport Act, with greater responsibility for planning and coordinating bus services.

In contrast, rail services operate under a regulated system of franchising, with the public sector specifying the service requirements for train operating companies to bid for. At present most rail services in the region (except for some south Wales Mainline services) are provided by TfW.

Following reductions in passengers post covid, The WG have invoked Operator of Last Resort provisions to effectively nationalise operation. Rail service stability has been greater than bus; however, this has necessitated a higher level of subsidy to reflect the greater operating costs of rail. The different legislative systems and funding streams increase the need for careful consideration of the requirements for integration between modes.

A recent WG report on 'The future of bus and rail in Wales' proposes a transitional change to how bus services are procured, through a franchise model. The legislation to enable this to happen will take several years to implement, and there are fundamental issues to address to ensure a decent level of bus service provision is achievable for our region until any new legislation is introduced.

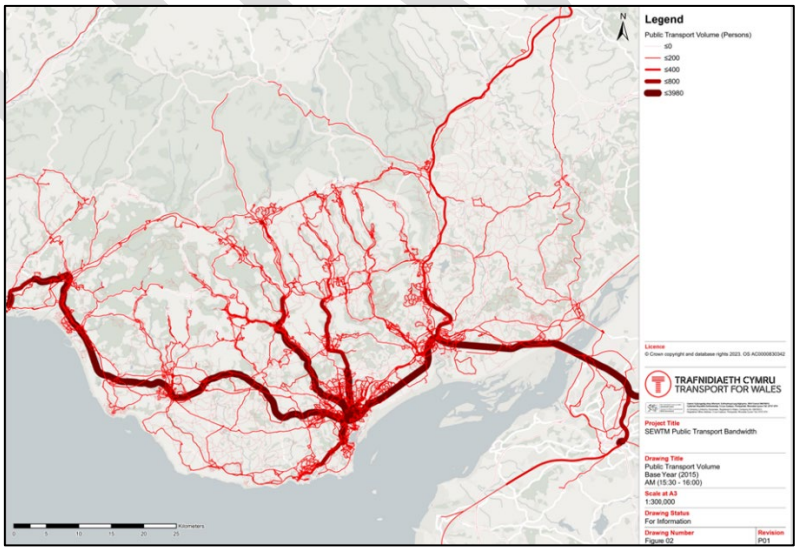
Data and Trends

Whilst the region has aimed to retain as much bus network capacity, through existing and new funding schemes (the WG Bus Network Grant scheme), various levels of demand and finite funding / vehicle resources result in considerable variation in the levels of bus service provision across the CCR. The bus network reflects the historic and perceived level of demand, reflecting the former commercial nature of most services. Whilst main urban/regional corridors have good levels of daytime service, areas with more sparse populations (including rural and upper valley areas) have limited, if any, provision.

Across the region, there is a significant reduction in bus network coverage during evenings and Sundays, with many areas devoid of a bus service during these periods. Even where bus services operate, these are usually at greatly reduced frequencies, with limits opportunities to access evening employment, education, health and leisure facilities. There are no late-night local bus services currently in operation.

Figure 8 shows the most heavily used public transport routes are the east-west South Wales Lines and north-south Valley Lines as well as a dense network of bus routes linking into Cardiff and Newport and larger towns in the region e.g., Pontypridd, Bridgend, Cwmbran and Caerphilly.

Figure 8: Public Transport Volume (Persons) 17:00pm - 18:00pm (2019)



*Awaiting updated plan to include the whole of Monmouthshire CC.

Service frequency is a key influence on the propensity to use public transport and ability to achieve modal shift from private motorised modes. There are disparities in access to public transport stops/stations with a frequency of at least 4 per hour on a weekday between 7am and 7pm across the CCR. There are large areas of Monmouthshire and Vale of Glamorgan devoid of public transport provision, which will have significant impacts on the ability of people to get to work and access key facilities and amenities in the absence of a private vehicle, which reflects the rural nature of these counties. There are also significant areas within the valley communities where there is a lack of services e.g., Cwm, Abertilery, Rhigos, Tonyrefail/Hendreforgan, Llanharry, Ogmore Vale and Pontycymmer.

The situation on a Sunday is much worse, with access to public transport stops/station with a frequency of at least 1 per hour (07:00 to 19:00) extremely sparse, meaning it is often impractical for anyone living outside of urban areas to travel to work, or to access social and leisure activities by public transport on a Sunday.

Cardiff, Newport and a relatively large proportion of the valley communities have the late public transport departure times on a Tuesday (9pm to midnight), this coincides with the greater number and density of facilities and amenities. It should be noted that even in urban areas, service frequency of evening services is significantly reduced, which limits the practical use of public transport, particularly journeys that require interchange between services.

There are significant pockets of evening public transport isolation in the most northern communities in the region where the latest departure is between 6pm and 7pm.

On Sundays, the latest departure time is earlier than 6pm, or there is no service, for the majority of Monmouthshire, significant proportions of Vale of Glamorgan and large pockets across the valleys.

There is a lack of evening and weekend bus provision in many areas. Where services operate these are often at a reduced frequency, which leads to difficulties in accessing key services, and again contributes to a reliance on car travel.

Sustaining Bus Services

The total number of recorded bus routes has reduced by 16% since 2015 as shown in Figure 9. The km of bus routes operated in the region has been in steady decline since 2015-16 (27% reduction), and the number of bus operators has reduced by 50% as shown in Figure 10. This reflects the withdrawal of services where they cannot be justified within the resources available. There is a balance to be struck between the stability required to give confidence to users and grow patronage, whilst providing opportunities to access to socially necessary facilities.

Figure 9: Change in the number of bus routes between 2015 and 2023

	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Number of recorded routes (from BSSG certification)	496	494	516	459	462	440	421	421

Figure 10: Change in the number of bus operators and km operated between 2015 and 2023

	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Km operated (in service)	51,412,327	53,175,468	52,938,183	52,799,567	50,141,172	28,685,013	39,422,481	39,013,025
Number of operators providing services	26	22	17	16	14	13	13	13

Fares

Under current legislation, the setting of Fares on commercially registered bus services is the responsibility of the operator. These reflect a number of elements, including the number of passengers, level of competition from other operators, distance travelled, proximity to rail services and the operating cost of providing service. As a result, there is limited consistency of fares in the region, even within some operators' networks. In general, urban services offer the cheapest services, which reflects the higher average number of passengers to cover operating costs. Although Local Authorities can specify fares on services they procure, this must be balanced with the risk of consistency with fares on other services and the finite quantum of funding.

Rail Fares are generally regulated in line with the National Rail requirements, although there is scope for operator specific fares and promotions. These have been utilised in some parts of the region which results in variation on the cost per km between different rail lines.

As a result of these factors there is inequality of fares within and between modes across the region.

Public Transport Journey Times

Public transport journeys are at an inherent journey time disadvantage compared to private modes, as there is a need to balance directness of route for speed, with the geographical coverage to serve as many people as possible, including the time penalty of stopping to facilitate boarding and alighting.

Elements, such as congestion, low service frequency and the potential requirement to change vehicle/service to reach the desired destination will further increase the generalised journey time of public transport. longer journey times and non-direct routes mean public transport is not a viable alternative to private car.

In many cases, bus services are not coordinated with train services, so passengers often face a lengthy or uncertain wait for the next stage of their journey. This lack of integration makes multi-modal journeys difficult, time consuming and expensive, especially as part of a daily commute.

As a result, the journey times of public transport are currently less competitive than desirable.

Opportunities to improve the efficiency of the public transport network, including bus priority, pre-purchase of tickets and frequency enhancements would improve the comparative performance and attractiveness of public transport.

Deregulation of bus services has resulted in a range of operators providing services, complicating the bus system for potential passengers in terms of timetable, frequency and ticketing options.

Public Transport Geographical Accessibility

Ease of access to the public transport network can impact on people's transport options and subsequent travel choices. the percentage of people within walking distance of sustainable modes of transport, is a WTS Subsidiary Monitoring Measure. In this data, walking distance is defined as those within a five-minute walk of an hourly bus service or active travel route, or within a ten-minute walk of an hourly rail service.

In 2023, 11.6% of the region's population lived within walking distance of a railway station, which is higher than the proportion across Wales (7.5%).

Over half of the region's population were within a 5-minute walk of a bus service, compared to 47.3% in Wales as a whole.

Between 2019 and 2023, the percentage of people within walking distance to bus services in CCR decreased by 5.2% and could reflect reductions in service levels over this time-period.

Accessibility – Physical

Since 2017, all public service buses are required to be compliant with the Public Service Vehicles Accessibility Regulations (PSVAR), which includes elements such as low floor boarding access and the provision of wheelchair spaces. Local Authorities continue to invest in supporting infrastructure, including accessible kerbs to assist boarding and alighting. The recently published DfT guidance for accessible information onboard local bus and coach services, includes requirements for onboard audio/visual information to assist all passengers, with particular benefits for persons with reduced sensory levels.

The challenges and opportunities for the CCR are captured below: -

Challenges	Opportunities
Common M4 journeys are poorly served by public transport alternatives.	Recommendations of the Burns Commission includes a number of interventions, including Park and Ride, New Rail Stations and Bus Rapid Transit.
SW Mainline focuses on intercity rail services over commuting services.	Proposals for 5 new rail stations on the South Wales Relief Lines.
Many post-war developments are not served by rail services, such as eastern and north-eastern parts of Cardiff, and suburban areas of Newport.	Consider opportunities to reinstate former rail lines (proven examples of Vales of Glamorgan and Ebbw Vale lines).
End to end service frequencies on the Ebbw Valley line are low, with hourly services to Newport and Cardiff respectively.	Consider opportunities to provide infrastructure and rolling stock enhancements to support increased frequency of services.
Although bus services may work well for some intra-city commuting, the South East Wales bus network generally offers a poor service for common commutes, particularly where low service frequencies result in extended generalised journey times.	Consider limited stop, express buses where no rail corridor exists including inter-regional, Heads of the Valleys and east to west services.

The current bus network serves city and town centres well, but often fails to connect to out of town employment areas in the region.	Consider opportunities to provide peak hour connections to large employment clusters, with vehicles potentially utilised for off-peak links to areas that do not have a suitable service
Existing public transport services within the region are typically not co-ordinated or planned as a single network, which further limits the attractiveness of multi-modal journeys and limits the reach of the network.	Consider opportunities through proposed legislative change for greater consistency and coordination of services, and further expansion of integrated ticketing.
Severe lack of evening and weekend services in most places across the region.	Consider opportunities for provide addition service coverage, subject to availability of funding.

4.5 Active Travel

In common with the trends across Wales, the density, connectivity and overall coverage of active travel infrastructure reflects the nature of the settlements in the region and the focus of the Active Travel (Wales) Act 2013 on built up areas.

As a result, the existing and proposed active travel infrastructure is concentrated in the cities, towns and larger villages. Local authority Active Travel Network Maps, details the existing and proposed active travel routes and supporting infrastructure. This includes:

- The proportion of the CCR's population living within walking distance of an active travel route increased between 2019 and 2023, going from 42.1% in 2019 to 44.4% in 2023;
- CCR saw the lowest increase in Wales during this period;
- In 2023, 11.6% of the region's population live within walking distance of a railway station, which is higher than the proportion across Wales (7.5%);
- Over half of the region's population were within a 5-minute walk of a bus service, compared to 47.3% in Wales.

Despite significant levels of funding being allocated to upgrading active routes over recent years, there are still many areas where active travel is poor or non-existent and where challenges and opportunities co-exist.

Challenges	**Opportunities**
Limited options for walking and cycling within and between rural communities due to perceptions of, and actual safety brought about by remoteness, lack of lighting, and limited footways, with relatively high traffic speeds.	Continue to build on the region's network, particularly through improved routes to rail stations, public transport interchanges health, educational and leisure facilities, as well as better supporting facilities e.g., secure cycle storage.
The physical geography of many communities in the CCR, particularly the valley authorities, does not lend itself to extending the active travel network or promoting walking and cycling as a feasible mode of travel.	Support the development of e-bike hire schemes to encourage cycling, particularly around hilly areas.

Road safety concerns, particularly where high traffic volumes on A-roads run through town centres and in areas with high pedestrian activity.	Expand the delivery of cycle training beyond primary/secondary school.
Active travel is insufficiently integrated with the wider transport network	

4.6 Air

Cardiff Airport is an essential part of Wales strategic transport infrastructure. Providing international connectively, it is an important driver within the Welsh economy. The airport provides a gateway for business and leisure passengers, which is an enabler for tourism and helps support industry.

The airport has a much higher mix of scheduled to chartered flights than most other major airports in the UK. Scheduled flights are often used as an indicator of business travel use.

The number of passengers using Cardiff International airport fell sharply at the start of the coronavirus (COVID-19) pandemic in 2020 as a result of travel restrictions which continued into 2021. In 2022, passenger numbers still remained lower than pre-pandemic levels, but increased seven-fold to 857,397 from 123,000 in 2023. This includes both arrivals and departures. However, it is continuing to make a loss as it struggles to attract passengers back to pre-pandemic levels. There were losses of £4.5m in the year to March 2023, after receiving a Welsh Government grant of £5.3m.

Cardiff Airport is located within the Cardiff Airport and Bro Tathan Enterprise Zone in the Vale of Glamorgan. The Enterprise Zone offers a wide range of development sites and business accommodation, providing opportunities for the development of bespoke facilities or investment in existing accommodation, as well as opportunities for freight transport.

It has an important role, both as an international gateway and as a major driver within the Welsh Economy, supporting 1,800 aviation-related jobs at the Airport as well as directly and indirectly supporting a further 2,675 jobs across the wider area. The overall gross value-added impact to the local economy is £102million, where 30% of the passengers are visitors to Wales.

As part of the development of the CCR and corresponding City Deal, there is a strong political will to improve transport connectivity across the region, protecting and enhancing employment and investment opportunities to help retain and attract a skilled population. It is envisaged that investment at and around the Airport will help to ensure that the CCR is better connected and as a result more competitive and attractive to business and visitors alike.

Challenges	**Opportunities**
Continues to make a loss as it struggles to attract passengers back to pre-pandemic levels.	Potential to grow the existing cargo facilities at the airport via a new cargo terminal.
Sustainable transport links directly to the airport are limited.	Expanding the Airport's route network will help to foster trade, enable businesses to access markets further afield, and attract higher value inward investment, whilst also supporting the nation's important tourism industry.

4.7 Ports & Freight

Ports have a major role to play in helping Wales address the big challenges posed by decarbonisation and digitisation, enabling those challenges to be turned into hugely significant economic, social and environmental opportunities.

Barry Port

The Port of Barry is a key facility for the region's chemical industry, handling liquid bulks for major companies including Dow Silicones. The port handles around 300,000 tonnes of cargo, contributing over £340 million to the economy every year and supporting around 5,000 jobs. The port also features the Barry Solar Farm, covering 37 acres. The solar installation generates clean energy for ABP, its port tenants' operations and the National Grid. The Port of Barry has direct access to the M4 at Junction 33 and is situated 9 miles (15km) from Cardiff and just 6 miles (10km) from Cardiff airport. There are direct rail services from Barry Docks to Cardiff and onward direct services to London Paddington, Birmingham New Street.

Newport

As Wiles' leading general cargo port, the Port of Newport supports 4,100 jobs nationally and annually contributes £275 million to the economy. Every year the port handles some £1 billion of trade, a vital part of the supply chain for businesses across Britain. The Port of Newport benefits from excellent connectivity with direct road access to the A48 Southern Distributor Road and the M4, J24 and J28, connecting Newport with London and the Midlands. The port offers multimodal freight facilities with deep-sea access and direct links to the national rail network. [9]

Cardiff Port

Cardiff is one of the leading ports in South Wales and the UK. The port builds on a rich heritage of international trade and continues to serve businesses throughout Britain. Today, the Port of Cardiff supports 2,600 jobs nationally and contributes around £180 million to the economy every year. Being located 14 miles (22.5km) from Junctions 29 and 30 of the M4, and having direct links to the national rail network, makes it an impressive multimodal location. It is also less than two and a half miles (4km) from the city centre, making it an ideal distribution centre. Three berths are approved for cruise liner calls are situated less than one minute away from the centre of the Welsh capital and its world-class tourist attractions.

The region's ports act as international gateways, increasing trade and inward investment opportunities in CCR and beyond and are focal point for investment, delivering local jobs and services and benefits to the wider economy of the region. Furthermore, ports and harbours lead a green maritime recovery across Wales, including renewable energy projects, industrial decarbonisation and offshore renewables.

The WTS recognises that maritime transport is more energy efficient and supports low-carbon logistics networks in Wales, and that the efficient operation and development of ports and harbours supports marine conservation and the marine environment.

There are further opportunities to maximise our ports, both to help tackle climate change, and to expand our offer in respect of both the transportation of freight and the labour markets as identified below.

[9] Associated British Ports | Future Ports: Wales Vision (abports.co.uk)

Challenges	Opportunities
Ports in South Wales are continuing to face difficulties related to post-EU Transition processes.	South Wales tidal range makes it is one of the best places in the world to generate power from marine renewable energy.
Significant capital investment required to achieve potential.	Ports have always been great manufacturing sites, because they are able to co-locate proximity to skilled labour with great road, rail and sea links – creating real cost and efficiency advantages. These advantages are going to be amplified as carbon taxes get implemented, making South Wales ports even better locations for a new cycle of manufacturing innovation.

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5. Developing Regional Transport Objectives

About the Objectives

The candidate objectives listed below are deliberately broad and are intended as a spur for stakeholder engagement. They will most likely be rationalised and reduced in number as part of the stakeholder consultation and public engagement process.

The objectives are directly aligned to the WTS Well-being Objectives & Priorities and, critically, the CCR Strategic Goals. Ensuring that transport underwrites the CCR Strategic Goals is a key focus, enabling the realization of benefits to the citizens of the region. Figure 11 overleaf demonstrates how the candidate objectives align and the WTS measures that will be the basis of targets.

CCR Strategic Goal: A Competitive Region

- **Enabling businesses within our priority sectors to achieve higher levels of productivity through innovation-led growth**

Candidate Transport Objectives Aligned to the Goal	
TPO1	To use transport as a means to deliver on our vision for a bigger, fairer and greener region, in which the 'golden triangle' of transport, planning and economy create conditions to 'do well, do good'. This will be delivered by improving sustainable public transport provision that is competitive with existing car journeys, both in cost and time, and furthering the development of the active travel network alongside improvements targeting road safety.
TPO2	To enhance the region's transport and digital connectivity with high quality and reliable infrastructure to improve the connections between people, employment, education and key facilities, as well as for goods and industry, capitalising access to the region's investment zones, airport, ports and main gateways.
TPO3	Reduce and balance travel demand by influencing the location of new development and enabling polycentric growth that prioritises sustainable modes of transport, through alignment of the economic wellbeing, transport planning and spatial planning.

A Connected Region

- **Invest in cutting-edge digital and physical infrastructure and grow the green economy**

Candidate Transport Objectives Aligned to the Goal	
TPO4	To create safe, healthy and equal communities across the region ensuring residents and visitors have access to sustainable and affordable transport options such as active travel, public transport, and charging infrastructure to enable a transition to low emission vehicles.
TPO5	Provide an improved transport network that enables the integration of high-quality transport modes, that is convenient and easy to use, affordable and accommodates the diverse travel pattern needs of the region, to reduce barriers to economic activity and to improve quality of life.
TPO6	Improve connectivity between the CCR and the rest of Wales, the UK and Europe, capitalising the distinctive geography of the CCR as the gateway to Wales and England, improving access for all to employment and training opportunities, services, healthcare, education, tourism and leisure facilities.

A Resilient Region

- **Maximise 'good growth' by ensuring prosperity is shared and spread across the Region and take direct steps to reduce inequality**

Candidate Transport Objectives Aligned to the Goal	
TPO7	Reduce greenhouse gas emissions, air pollution and noise emissions from road transport by 60% by 2035 through a reduction of private car miles and enabling the low carbon vehicle roll-out including electric and hydrogen vehicles, supported by an evidence-based charging infrastructure programme.
TPO8	Improve the use of existing transport infrastructure and ensure that climate resilience and actions to address inequality, are embedded in all future interventions.
TP09	Increase the proportion of journeys made by sustainable modes of transport such as public transport and active travel within all communities, by improving the safety, quality, attractiveness, efficiency, affordability and reliability of the regional transport system.

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Figure 11: Alignment of the candidate objectives against the WTS monitoring measures

CCR Vision	Our ambition is to be a proud Cardiff Capital Region where everyone is connected locally and globally, enjoying work, business and life opportunities that make us the place to fulfil potential.								
WTS Well-being Ambitions	**Good for the economy and places in Wales**			**Good for people and communities**		**Good for culture and the Welsh language**		**Good for the environment**	
CCR RTP Candidate Objectives	**TPO1**	**TPO2**	**TPO3**	**TPO4**	**TPO5**	**TPO6**	**TPO7**	**TPO8**	**TPO9**
WTS Priorities	**Bring services to people in order to reduce the need to travel**			**Allow people and goods to move easily from door to door by accessible, sustainable and efficient transport services and infrastructure**			**Encourage people to make the change to more sustainable transport**		
CCR Strategic Goals	**A Competitive region** Enabling businesses within our priority sectors to achieve higher levels of productivity through innovation-led growth			**A Connected region** Invest in cutting-edge digital and physical infrastructure and grow the green economy			**A Resilient region** Maximise 'good growth' by ensuring prosperity is shared and spread across the Region and take direct steps to reduce inequality		
WTS Monitoring Framework Measure	% of workforce working remotely on a regular basis Average travel time to education, health and leisure services % of people satisfied with their ability to access services in their local area			% journeys by walking, cycling and public transport average cost per kilometre travelled by public transport Average distance travelled per person			Greenhouse gas emissions from the transport sector % vehicles that are ultra-low or zero emission level of air pollutants from the transport sector Number of publicly available electric vehicle charging points		

	Total vehicle kilometres travelled Average distance travelled per person percentage of journeys by walking cycling and public transport % of trips to visitor attractions by sustainable modes of transport % of land-based freight moved by rail % of the rail network that is electrified % of bus and rail services on time	% of workforce working remotely on a regular basis Average travel time to education, health and leisure services % of people satisfied with their ability to access services in their local area % of people satisfied with their journey % of people who feel safe and welcome when travelling % of people within walking distance of sustainable modes of transport % of journeys to a rail station by walking cycling or bus % Of people who feel they can't afford to travel by public transport	% journeys by walking, cycling and public transport % of people regularly bothered by noise from outside the home caused by transport % of transport infrastructure in good condition % of transport infrastructure at risk of flooding Hectares of habitat on the transport estate maintained or improved for biodiversity benefit % journeys by walking, cycling and public transport % of people satisfied with their journey % of people who feel safe and welcome when travelling % of people who walk or cycle at least once a week as a means of transport

6. Enablers

6.1 Innovation

As observed by InnovateUK in the Transport Vision 2050, “the quality and efficiency of the transport system are critical for the UK, its economy and the wellbeing of the population. Significant change over coming decades will drive and necessitate innovation.” Critically, they recognize that innovation in transport and infrastructure must be collaborative in nature – working across academia, private and public sector partners.

Innovation has been a key driver for CCR – it is the only UK region to attract two Strength in Places programmes, focused on compound semiconductors and creative industries respectively, totalling almost £100m. These transformational programmes were delivered through partnerships across academia (involving each of the region’s higher education institutions), multiple industrial and public sector partners.

There is an opportunity to leverage drivers for innovation in regard to transport – for example, infrastructure resilience, digital & data and net zero. Likewise, partnerships cannot be regionally restricted and must be national and international in nature to accelerate change. By way of illustration, CCR recently supported Cardiff University in a collaboration between UK Research and Innovation (UKRI) and the US National Science Foundation, as a partner in the £10m Global Centre for Clean Energy and Equitable Transportation Solutions (CLEETS). This international collaboration will focus on reducing emissions from road transport – a significant challenge as highlighted in this document.

Challenge-driven Transport Innovation

Since autumn 2021, the CCR Challenge Fund has invested in several challenge-driven transport projects using innovation to make progress towards zero emission targets and decarbonise local authority vehicle fleets. Working with partners, Merthyr has benefitted from charging infrastructure which uses innovative quiet, zero-emissions technology for an industrial depot that would usually generate a lot of noise and pollution.

Local authority teams in Caerphilly have recently completed the discovery phase of their EV fleet optimisation project. Solutions were being sought to inform decisions regarding electric fleet vehicles and charging infrastructure procurement. This project is developing innovative digital solutions to plan the optimal number and size of vehicles required to deliver services, the exact location and size of each charge point and to model their usage pattern based on shift and route information of each vehicle. This will reduce the overall charging needs and avoid the need for unnecessary chargers.

Other Challenge Fund projects include innovative solutions for decarbonising the school bus existing fleet, as well as zero-emission hydrogen powered vehicles for meals on wheels in Monmouthshire. All of these types of innovative interventions are seeking opportunities to scale up and be extended initially across the region, but with potential to provide real commercial opportunities for the UK and wider afield.

6.2 Investment

The transition from the CCR City Deal to the CJC offers opportunities for regional public investment at scale and outside of the parameters of one funding programme. One of the key areas of opportunity places an emphasis on embedding energy objectives into economic objectives, in order that the societal and economic impacts are maximised. Not only will this help the development of specific programmes and projects, but it will also assist the mind-set change needed in showing wealth and wellbeing objectives, as closely aligned.

With the prospect of more place-based funding for Research & Development (R&D), infrastructure, initiatives such as the Shared Prosperity Fund, Green Industrial Revolution Fund (£12BN) and a revised Industrial Strategy, this will position CCR to bring together all of the public funding investment opportunities that can be used to lever in additional private finance and partnerships to deliver on ambitions.

Cities across the UK are turning to reviewing demand management schemes as effective solutions to addressing poor air quality and congestion. CCR is experiencing these fundamental challenges, particularly in Cardiff. In addition, exploring new sources of long-term ring-fenced infrastructure and revenue support in addition to existing funding provides the potential opportunity to accelerate achievement of the RTP objectives.

Road user charging, congestion zones, clean air zones and workplace parking levies, amongst others, are types of schemes that could provide the funding leverage to invest in the sustainable transport initiatives needed to significantly increase mode shift, access to opportunities, address congestion, improve air quality, reduce carbon emissions and attract new inward investment in the region.

6.3 Data & Analysis

Through the adoption of new statutory powers, CCR has a unique opportunity to develop transformational regional policy and interventions. However, there is a need to ensure connectivity across the areas of economic wellbeing, spatial planning and transport to ensure that we leverage their potential.

To support this, there is a pressing need to develop regional data & intelligence capability that can drive actionable insight through synthesising diverse data sources. Routinely linking spatial, environmental and transport data, and understanding how this aligns with our economy and wellbeing, will inform policymaking and design interventions for the region. Unlocking the potential of data will allow CCR to refine our approach to placemaking, including the development of transport policy & interventions.

As recognised by the Local Government Association, data, analysis, tools and models can be used to understand key information which is important to delivering transport, such as travel pattern data, user demand profiles, congestion and efficiency indicators, and capacity analysis. This will also enable the use of predictive models to enhance citizen wellbeing outcomes, thereby better understanding economic drivers and pressing challenges around, for example, encouraging modal shift and the drive to a net zero travel.

6.4 Partnerships

Building strong partnerships is one of the key enablers and the delivery of transport can be demonstrably improved by effective communication and partnership working.

As highlighted previously, CCR currently engages partners across industry and the public sector to develop and deliver transport infrastructure and services. Each partner has an important role to play in ensuring CCR can deliver against its transport and wider objectives - from Welsh & UK Government to Bus Operators, Community Transport and Demand Responsive Transport (DRT) providers, and many others.

While delivery of the RTP is primarily driven by local authorities, it is critical for CCR to be a convener for these partners, ensuring they are aware of their role in delivery of the RTDP, and monitoring progress. The Engagement Plan will actively engage the partners, ensuring that there is buy-in at an early stage.

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7. Engagement Plan

The implementation of the RTP process will be informed and shaped by extensive engagement with stakeholders and citizens. Extensive engagement has already taken place between a variety of groups, including local authority officer groups for economic development & regeneration, planning and transport. In particular, transport officers have been regularly and meaningfully engaged through the Regional Transport Collaboration Group.

Likewise, an extensive programme of engagement took place from January to April 2024, educating stakeholder groups on CJC transition, including the statutory power for regional transport planning. This included elected Members across the ten local authorities, public sector partners, higher and further education and the private sector.

Engagement will be driven by a continued focus on developing the evidence base and data, ensuring there is a functional feedback loop, appropriately informing the development of the RTP. Resources are currently being procured to support CCR in executing the proposed engagement with wider stakeholder group and conducting public consultation.

The Engagement Plan identifies stakeholder groups, how and when we will engage with them, and how this will be used. Upon appointment of consultation and engagement resources, this will be further updated.

A Consultation Report will be prepared at the required stage of RTP development, and this will detail engagement activities and highlight key issues and opportunities raised through consultation, and how this has been incorporated into the RTP, as is appropriate. Welsh language requirements will be followed in all engagement activities detailed in the Engagement Plan.

Updated Delivery Programme

Action	**Date**	**Amended Dates as of June 2024**
CJCs submit Implementation Plan to WG	31 October 2023	Complete
CJCs to submit RTP Case for Change	31 May 24	28 June 2024 (draft) Formal confirmation following CJC formal mtg 26 July 2024
CJCs to submit initial draft RTP, IWBA and RTDP to WG BEFORE public consultation	30 Sept 24	30 Sept 24
CJCs to submit final draft RTP, IWBA and RTDP to WG	If required, back-stop date to be agreed.	Likely Q4 2024-25
CJCs to submit final RTP, IWBA and RTDP to WG	29 March 2025	29 March 2025
WG decision on approval of RTPs	30 June 2025	30 June 2025

Who you want to engage with		Why you want to engage with them	How you will engage with them	When you will engage			What you will do with the feedback they provide
Stakeholder Group	Details of Stakeholders			Engagement frequency	Dates of engagement undertaken	Dates of future engagement	
Regional Transport Sub-Committee (RTSC)	Members of SEWCJC RTSC	CJC is ultimately responsible for the preparation of the RTP. RTP Sub Committee will review and approve key RTP documents prior to submission to WG.	Attendance and presentations at CJC meetings at key stages.	As required in RTP programme	N/A	11 July 2024 19 September 2024 14 November 2024 19 January 2025 13 February 2025	Feedback will directly inform the development of the RTP, e.g., Case for Change, RTP objectives, RTP policies, RTDP. RTP documents will be updated to reflect feedback (as required) prior to submission to WG.
CCR RTP Review Group	Members of the CCR RTP Review Group	Key stakeholder group in RTP development. Feedback will inform the development of all stages of the RTP.	RTP Working Group meetings	Monthly	n/a	To be established at first meeting of RTSC	Feedback will directly inform the development of the RTP, e.g., Case for Change, RTP objectives, RTP policies, RTDP.
CCR Regional Growth Board	Members of the CCR Regional Growth Board	Feedback will inform the development of the RTP.	Presentation at RGB meetings	As required	RGB to convene on 22 July 2024	To be established at first meeting of RGB	Feedback will directly inform the development of the RTP, particularly aspects around inclusive economic growth.
Welsh Government Officers (Regional Transport Planning)	Key contact is the CCR RTP within WG and representatives from TfW	WG will review and approve RTP documents at key milestones.	Submission of RTP documents to WG for review and approval at key stages.	As required in RTP programme	Weekly meeting since November 2023	Weekly	RTP documents will be updated to reflect feedback received from WG (as required).

Who you want to engage with		Why you want to engage with them	How you will engage with them	When you will engage			What you will do with the feedback they provide
Stakeholder Group	Details of Stakeholders			Engagement frequency	Dates of engagement undertaken	Dates of future engagement	
Local Government – Elected Members	Elected Members of CCR LAs	Feedback will inform the development of the RTP.	Stakeholder workshops.	As required in RTP programme	Briefing across LAs as part of CJC transition from January – March 2024	Planned for late summer 2024 and winter 2025	Feedback will inform the development of the RTP.
Local Government – Officers	Officers within CCR Councils, e.g., Transport, Planning, and the Brecon Beacons National Park Authority	Feedback will inform the development of the RTP.	Regional	As required in RTP programme	Monthly throughout the current and past years	Monthly and as required, dependent on programme	Feedback will directly inform the development of the RTP.
Other CJCs	Representatives from the North Wales CJC, Mid Wales CJC and South West Wales CJC	Ensures knowledge is shared and avoids duplication of work.	Stakeholder workshops.	As required in RTP programme	Representatives from SE Wales and SW Wales attended stakeholder workshop on 25th April 2024	Bi-monthly	Feedback will inform best practice and aspects of RTP development.
Transport for Wales	TfW officers representing CCR and other specialisms	Ensures the RTP reflects work being undertaken by TfW.	Stakeholder workshops.	As required in RTP programme (3 currently planned)	Weekly meeting from November 2023	Weekly meeting	Feedback will directly inform the development of the RTP, e.g., Case for Change and RTP objectives.
	TfW officers involved in the provision of datasets to the CJCs.	Ensures the RTP is developed using the most current data.	Meetings as required	As required	Weekly meeting from November 2023	Weekly meeting	TfW data provided will inform and be used within the Case for Change.
Neighbouring Local Authorities (England)	Representatives from neighbouring local authorities	Ensures knowledge is shared, cross-border issues are reflected in	Meetings as required	As required	N/A	As required	Feedback will directly inform the development of the RTP.

Who you want to engage with		Why you want to engage with them	How you will engage with them	When you will engage			What you will do with the feedback they provide
Stakeholder Group	Details of Stakeholders			Engagement frequency	Dates of engagement undertaken	Dates of future engagement	
		the RTP and avoids duplication of work.					
Transport Operators	Representatives from companies and organisations delivering transport services, e.g., bus operators	Ensures stakeholders across a range of policy areas can input to the development of the RTP.	Stakeholder workshops.	As required	N/A	July 2024 onwards	Feedback will directly inform the development of the RTP.
Transport User Groups and Campaign Groups	Representatives from relevant regional and national Transport User Groups and Campaign Groups	Ensures stakeholders across a range of policy areas can input to the development of the RTP.	To be decided based on best method	As required in RTP programme	Ongoing regular meetings	July 2024 onwards	Feedback will directly inform the development of the RTP.
Members of the public	Members of the public	Ensure the public can input to the development of the RTP.	Public consultation - will use a variety of methods, such as. easy-to-understand, on-line consultation questionnaire and in-person engagement events (TBC).	One period of public consultation (8-weeks)	N/A	September – October 2024	Feedback received through public consultation will directly inform the development of the RTP.

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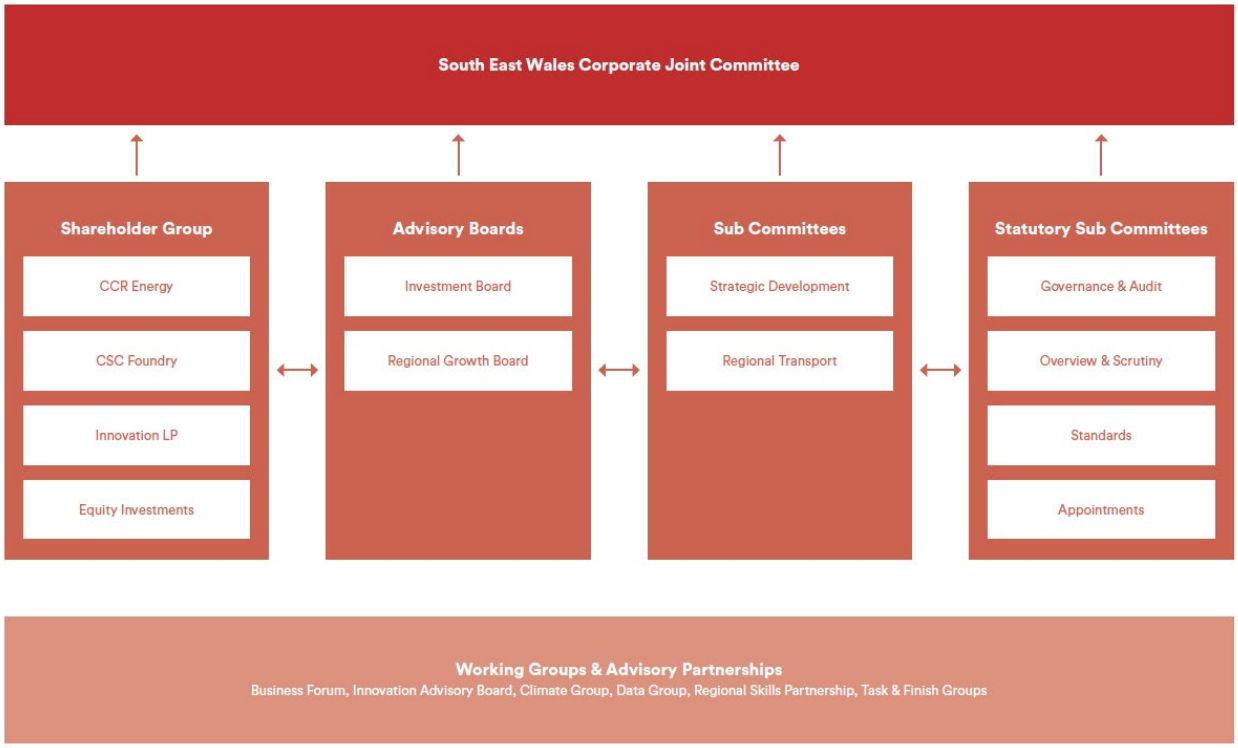
8. Governance

The CCRTA, now the South East Wales Regional Transport Sub Committee RTSC, has transitioned and is a sub-committee of the SEWCJC Board, working in tight alignment with a Strategic Development Partnership. Going forward, there will be direct interaction and dependency with the Regional Growth and Investment Boards, ensuring alignment with economic development ambitions, and statutory sub-committees to ensure adherence to relevant legislation, standards and monitoring requirements.

The table below shows the approved Governance set up of the CJC, showing the interconnectivity between the different formal Boards, advisory Boards, working groups and Advisory Partnerships, Committees / Sub-Committees.



Review Group

The review group will include officers from the CJC, the CCR LAs, WG, TfW, representatives from rail and bus service providers, and any other representatives that the RTSC and CJC Boards identified as appropriate. Statutory bodies and other partners will be consulted as part of the process and will be included within the engagement plan.