

Review of the Essex County Council Bus Service Improvement Plan 2021 to 2026

First Annual Review

03 January 2023

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Cllr Kevin Bentley



Cllr Lee Scott

Introduction

Cllr Kevin Bentley, Leader of Essex County Council

Cllr Lee Scott, Cabinet Member for Highways Maintenance and Sustainable Transport

Welcome to the first annual review of Essex's Bus Service Improvement Plan (BSIP). In Essex we are proud of our long-term commitment to buses across the county, not just in urban centres but for our rural areas and market towns too. We recognise that there also remain huge challenges to delivering bus services, both nationally and in Essex and that the economic environment for the bus industry remains very difficult.

Nonetheless, the Essex BSIP process continues to offer an opportunity to deliver a transformative approach, promoting inward investment in Essex that will have a halo effect, extending more broadly across the county and nationally, beyond the immediate benefits delivered by the programmes the BSIP sets out. The four defining elements set out in the BSIP that governed our approach remain the same. These are:

Passion: The BSIP was written by the people who have lived and breathed the challenges of delivering a bus network in Essex, who have met and engaged with the people who use it and those who cannot access it.

Ambition: we do not want only to make a series of geographically based, worthy, but evolutionary improvements, we also want to create a new paradigm for how bus services are delivered in Essex, to transform sustainable travel opportunities for all. To this end we have identified five model projects to give us a way of delivering transformation across that diversity and since the BSIP was published have identified further opportunities. These aim to deliver high quality rapid transit for our urban and garden community populations; swift and reliable journeys for our urban centres; and link our less well-off areas with jobs,

training, and stronger local economies. We also want to transform travel opportunities for our rural villages, hamlets, and market towns.

Renewal: Buses helped deliver a golden age of travel and economic opportunity in the early to mid-twentieth century but have suffered a significant decline over the last few decades. We believe that to improve outcomes, help address environmental impacts including climate change and increase access to key services, we need new paradigms to revive those opportunities. The BSIP proposes the use of new technologies and approaches to provide services that offer the convenience of the car and a less stressful journey.

Equality: A journey for everyone. Many BSIPs focused on improving existing bus services. That is important, but it is not enough in Essex. In Essex most of our population cannot access a bus because they do not live close enough to a bus route. We did not want to produce a plan where those with bus services see improvements and those who have nothing still have nothing. That is a big challenge because we cannot run environmentally or financially sustainable bus routes with only a handful of people using them. We are developing new models that can create journeys that are attractive, convenient and earn their keep. Anyone watching the increasingly visible impacts of climate change will recognise the urgent need for such options.

Section 1 - Vision statement for the Essex Bus Service Improvement Plan:

1. Safer, Greener, Healthier (SGH) is Essex County Council's vision for travel across Essex. It will deliver a shift towards sustainable travel by encouraging Essex residents to rethink their journeys. The SGH vision is to make it easy for residents to travel more sustainably. Bus travel is safer, greener, and healthier than travel by car, both for individuals and for communities. If you travel by bus, rather than car, everyone benefits. Buses also help deliver the four key objectives in Everyone's Essex: A Plan for Essex:
2. A strong, inclusive, and sustainable economy. Buses support economic growth by:
 - Providing access to education and training to help people develop their skills.
 - Providing employment opportunities and getting people to work.
 - They are disproportionately used by those on lower incomes and can be critical in linking job seekers with employment.
 - Linking people with shops and leisure and supporting vibrant night-time economies.
 - Allowing urban shopping centres to be green, attractive, and feel safe.
 - Generating economic growth without the costs of congestion (which is still a factor even with zero emission vehicles), road traffic incidents, and air pollution.
3. **A high-quality environment.** Moving longer journeys from car to bus helps improve air quality and reduce CO₂ emissions. The greatest single climate change mitigation measure for the transport sector in Essex is to transfer journeys from car to bus, bike, or walking. That is true even given a wholly diesel bus fleet. Establishing bus, bike and walking as the predominant modes for urban areas would enable the creation of a more attractive environment than one dominated by cars and parking infrastructure.
4. **Health, wellbeing, and independence for all ages.** Buses are predominantly used by older and younger people and those with disabilities. They provide independence and an ability to access healthcare, education, training, and other services. For many, they are a key part of being able to live independently.
5. **A good place for children and families to grow.** By using buses, you are investing in your community. You are supporting access to services, improving health outcomes, and ensuring that communities are not just a good place to live for those with cars. Bus journeys are often a social occasion for regular passengers, allowing them to build friendships to combat loneliness.
6. Over the next five years, Essex County Council will work with the bus industry and other partners to deliver safer, greener, and healthier travel by:
 - Rebuilding the Essex bus network to recover from the impact of the COVID-19 pandemic.
 - Developing an attractive, sustainable, and affordable bus network, offering an alternative to car use.

- Reversing the long-term decline in passenger numbers, in absolute terms and as a modal share of all journeys.
- Improving public health and addressing climate change by reducing pollutants such as particulate matter, nitrogen oxides (NO_x), ozone (O₃), sulphur dioxide (SO₂) and carbon dioxide (CO₂) emissions, produced by cars in Essex.

Section 2 - Background to the BSIP and Annual Review

7. The Government launched its National Bus Strategy (NBS), '**Bus Back Better**', in March 2021. This aims to:
 - Recast the bus sector to allow it to recover from the impact of COVID-19.
 - Reverse the long-term decline in passenger numbers.
 - Help meet national emission, pollution, and health goals.
 - Help meet economic regeneration goals by reducing congestion.
8. This strategy redefines the market settlement established after the deregulation of bus services in 1985. It strengthens the role and powers of Local Transport Authorities (LTAs), giving them new responsibilities for:
 - The shape, functionality, connectivity and accessibility of the bus network.
 - The quality, accessibility, and integration of bus infrastructure.
 - Meeting the goals set out above.
9. The delivery of these objectives is to be achieved through:
 - Developing and Publishing a Bus Service Improvement Plan (BSIP), setting out the authority's strategic approach and targets for improving bus services.
 - An Enhanced Partnership (EP) between the LTA and bus operators. An EP has two parts the strategic EP plan and/or:
 - A county-wide Bus Franchising approach. This required development of an EP as a first step.
10. Following the requirements of the National Bus Strategy (NBS), ECC has:
 - In June 2021, issued a statutory note to the Department for Transport indicating that it was following the Enhanced Partnership route.
 - In October 2021, issued a BSIP detailing the County Council's approach toward delivering a revised bus network, setting out high level objectives and performance indicators.
 - In April 2022, agreed, issued and formally enacted an EP with operators.
11. Both the BSIP and the EP are 'living documents', that are required to be regularly reviewed. BSIP targets and indicators will be reported on every six months and there is an annual BSIP review process.
12. In line with the BSIP commitment this review has been carried out by ECC IPTU Officers and will be considered by the Essex Bus Strategy Forum (EBSF) and the Essex Bus Strategy Board (EBSB) and the EBSB will make recommendations based on and other information to the Cabinet over revisions to the BSIP for 2022/23. The review will include consideration of:

- The strategic aims of the BSIP and suggesting any revision needed to best align them with national and ECC policies, including the LTP.
- The impacts of changes to the bus network and commercial market over the year, to understand their impact on the network and considering what measures need to be taken as a result.
- Analysis of which elements of the BSIP have worked, which have not, which need improvement and how it could be revised to reflect this.
- Reviewing progress on KPIs, aims and objectives.
- Suggesting potential any alterations to KPIs, aims or objectives that the BSIP may need
- Assessing how external factors such as housing development or the availability of central government funding may be affecting the delivery of the policy.
- Reporting on passenger views using annual surveys, paid for by ECC but carried out by an independent surveyor, to understand passenger and non-passenger attitudes.

13. To this end the review is structured as follows:

Section 1	Introduction
Section 2	Background to the BSIP and Annual review
Section 3	Overview of developments the commercial market since November 2021
Section 4	Overview of Contracted Service changes since November 2021
Section 5	Summary of BSIP commitments and overview of delivery
Section 6	Review of delivering the Essex Enhanced Partnership.
Section 7	Forward Look
Section 8	Proposed revisions to BSIP commitments and targets

Section 3 - Overview of developments in the commercial market since November 2021

14. As set out in the original BSIP, Essex is a challenging territory in which to run bus services. Higher rates of commercial return tend to be seen in areas with higher population densities making simple and direct journeys. Essex's large geographic footprint with dispersed settlements and often lengthy and complex journeys means higher operational costs and lower revenues.
15. This is reflected in higher costs of operation, that have been exacerbated by steep rises in both fuel prices (even where larger companies have been able to hedge purchases – an option not open to SMEs) and staff wages, created by both cost of living increases and strong competition for staff from other sectors, (such as that for heavy goods vehicles) that face similar issues
16. Even before the Covid 19 pandemic commercial bus operations in Essex were not particularly profitable and there were reductions in commercial mileage across the county, with some of those operations being partly or wholly replaced by ECC contracted services and others significantly reduced or lost entirely. This trend in reduction of service by commercial operators was in part driven by declining patronage, but also by the challenges of delivering efficient and rapid services in the face of severe traffic congestion in town and city centres and around the major arterial roads. In conjunction with this the slow decline in passenger numbers reduced revenues. This meant that an increasing number of routes became commercially unviable.
17. The immediate effects of the Covid pandemic, including government messaging to avoid public transport, 'lock-downs', capacity restrictions due to social distancing and reductions in service levels due to staff shortages had an immediate and severe impact on bus use – at its nadir, passenger numbers fell to less than 20% of pre pandemic use.
18. By November 2021 passenger numbers had begun to recover somewhat returning on a like for like basis to around the 70% of pre-Covid usage. However, over the winter the spread of new Covid 19 variants and the enactment of the so called 'Plan B' measures set the recovery back considerably, with passenger numbers falling again. Following emergence from Plan B measures passenger numbers once again started to recover and by June 2022 had reached an estimated average of 70-80% of pre-Covid numbers, although this varied considerably by area and service.
19. However, this stage of the recovery appears to have plateaued, with passenger numbers remaining at this level right up to September 2022. Figures for the period 2015/16 to 2021/22 (the latter based on an estimate for the April to August 2022 period) are shown in Table 1.

Table 1 - Bus Passenger Numbers 2015/16 to 2022/23

Financial Year	Essex passenger numbers 2015-22	
	All operators	Trend (% change) year on year
2015-16	41,342,995	0
2016-17	41,731,831	0.94%
2017-18	41,239,583	-1.18%
2018-19	41,420,643	0.44%
2019-20	40,774,681	-1.56%
2020-21	12,431,915	-69.51%
2021-22	26,209,054	110.82%
Total passenger change 2015/16 to 2021/22	-15,133,941	-36.60%

20. Concessionary travel was particularly hard hit, falling very sharply and recovering much more slowly. By September 2022 this appears to have risen to around 60% pre-covid use.
21. A comparison of concessionary passenger numbers between 2018/19 and 2021/22 is set out in Table 2.

Table 2 - Comparison of concessionary passenger use 2018/19 to 2021/22

Month	Passenger Nos. 2018-19	Passenger Nos. 2021-22	% Change
April	1,124,872	417,496	-62.89
May	1,209,129	476,884	-60.56
June	1,218,384	549,267	-54.92
July	1,174,381	587,578	-49.97
August	1,180,905	600,675	--49.13
September	1,149,798	648,661	-43.58
October	1,236,876	654,355	-47.10
November	1,189,815	650,673	-45.31
December	1,060,678	533,524	--47.70
January	1,090,389	522,935	-52.04

22. This situation has not substantially improved since January 2022, suggesting a long-term alteration on the travel habits of pass holders.
23. Understanding why bus use has not fully recovered to pre-Covid level is not straightforward as a range of different factors appear to contribute.

Concessionary Bus Pass Use

24. Work undertaken by Transport Focus (Getting Free Bus pass users back on board: <https://d3cez36w5wymxj.cloudfront.net/wp-content/uploads/2022/06/30133051/Getting-free-bus-pass-holders-back-on-board.pdf>) supports this conclusion, indicating that there may be several reasons for this:
 - Around 65% of people are making fewer journeys overall less often than prior to Covid.

- Around 35% of people had ongoing concerns over the safety of bus travel due to corona virus.
 - Around 20% of people had reduced travel because of reliability and bus capacity issues.
 - Around 10% said they travelled less due to working from home.
25. Over the first half 2022/23, concessionary bus pass use in Essex was showing a slight increase compared to the previous twelve months. Use has risen from around 60% in October. However, there will need to be a sustained improvement over a longer term before it can be certain that use is returning toward pre-Covid levels. Even at this level there is still a significant shortfall in use compared to pre-Covid levels.
26. Given that ENCTS pass holders account for around one third of overall passengers across the Essex network (though varying significantly between services and times of day) the reduction in ENCTS pass use accounts for a significant proportion of the overall fall in passenger numbers. As such a significant and sustained increase in pass use is needed to restore the pre-Covid position and this will involve dealing with the proximate issues around reliability (see below), reassurance over safe use and encouraging pass holders to make more journeys for non-traditional reasons (for example making more leisure-based journeys to replace shopping journeys).

Changes to travel habits

Peak period travel - changes to office working patterns.

27. Data from bus operators indicates that the recorded reduction in peak period travel is particularly strong in locations where office-based commuters made up a substantial proportion of the peak travel passenger use pre-Covid. So, for example, in Chelmsford, where a substantial number of passengers were headed to London and where there is a strong office-based economy services faced a steeper drop in peak period bus use and recovered more slowly than in Basildon, which has a more retail and manufacturing-based economy.
28. There could be several reasons for this, but it seems likely that the well-recognised trend for organisations to adopt a longer term 'remote and flexible working' strategy for employees, following their experience with the use of remote working tools (such as Zoom and Teams) during Covid is having an impact. Essex County Council is one such organisation (with large footprint in Chelmsford). Even if bus using employees only spend one day per week working away from the office this could lower their demand for bus travel by 20%.
29. This may be demonstrated by the experience of Essex's Park and Ride schemes – two in Chelmsford and one in Colchester. The Chelmsford schemes were pre-Covid, heavily used by London commuters, local office workers and Anglia Ruskin University students & staff. While the University has reopened, passenger numbers at both Chelmsford sites are down on pre-Covid levels – significantly so at the Chelmer Valley site which was particularly attractive to commuters and appears to have plateaued. In comparison, in Colchester there is a very strong link (by location and special arrangements) with the large regional hospital, where employees, by the nature of the work are physically present and passenger numbers have recovered more strongly.

Other changes to travel habits

30. As noted for concessionary fares there is some evidence to support the idea that people's travel habits have altered. Car use data suggested that traffic has already returned to pre-Covid level and in some areas exceeded it. However, while this is the case for overall travel, peak travel in towns did not recover as quickly. This suggested that people may have changed their travel mode in response to the Covid conditions. There was some evidence that second hand car sales rose during this period so people, who have invested in a car may have decided to keep using it.
31. It may also be the case that as noted for concessionary bus pass holders some former bus passengers are choosing to travel less often, with growth in home deliveries and rising prices reducing shopping and leisure trips, alongside rises in fares. Similarly, the increase in support given to E scooter and cycling schemes through Active Travel Funding (ATF) may have attracted some users away from bus services.

Reliability, service availability and service rationalisation

32. The bus industry in common with the wider transport sector has been subject to a concatenation of impacts that have adversely affected its attractiveness to the public.
33. Some of these impacts are the result of longstanding systemic issues within the industry. For example, there is a national shortage of qualified bus drivers (exacerbated by the hiatus in test and licencing issue for a long period over the pandemic) where pay and conditions are competing with the HGV sector, who in turn have been able to offer very attractive recruiting packages. While the bus industry has responded by increasing training and raising wages, this has had an impact on both their ability to run services and on the commercial viability of services.
34. There have also been other proximate impacts - outbreaks of Covid could spread rapidly through a depot and across a business, leading to services having to be curtailed at short notice. The long recovery periods and serial nature of infectious outbreaks led to temporary but longer duration service reductions to allow those driver and other resources available to be focused on key services.
35. It is well known and demonstrated through many studies that unreliability is a major influence on the decisions people make on how to travel. Prolonged periods of service unreliability or withdrawal will break settled travel patterns forcing customers onto alternative modes and making it less likely that they will return to bus once the situation normalises.
36. The punctuality figures for bus services in Essex obtained by ECC from bus operators reflect these issues. These are shown in Table 3 .

Table 3 - Comparative bus service punctuality 2020/21 to 2021/22

Year	2020/21	2021/22
Service punctuality with the Traffic Commissioners operational window of not more than one minutes early of five minutes late	94.5%	88.4%

37. It is important to note that these figures are averages for Essex as a whole, and that performance in some areas will be better than in others.
38. Anecdotal data from regular meetings with bus operators suggests that while the situation in Essex does reflect the wider national picture, Essex has held up comparatively well in developing an active recruitment pool for drivers and other staff. However, it is noticeable SME operators have had greater difficulties in both recruitment and retention of staff as well as managing illness.
39. More recent partial year figures suggest that for larger operators the situation has been improving since April 2022. Interim figures for August 2022 suggest that currently punctuality is around 91.2%.
40. Part of this improvement may be due to service alterations carried out by Essex's larger operators earlier in the year. The combination of returning congestion, staff shortages, reduced passenger numbers and increased cost has forced bus operators to rationalise the bus network to retain commercial viability. This has allowed them to rationalise timetables to better reflect on the ground experience.
41. These service revisions have led to fewer kilometres being run in Essex but has tended to result in 'network thinning' through service consolidation, reduced frequencies, days, and times of operation rather than by complete service withdrawals which have, so far, been minimised.
42. Overall, there have been significant reduction in bus kilometres run (in some cases by 30% or more), although the level of access to a service at some level has largely been maintained. Most service frequencies have reduced by one step (so, for example, 15-minute frequencies reduced to 30 minutes, 30 minutes to 60 minutes) although this has been carefully managed over the more heavily used services. However, in many cases this approach has reached its natural limit and if further service reductions are required service withdrawals may be the only option.
43. The Mohring effect (the observation that, if the frequency of a transit service (e.g., buses per hour) increases with demand, then a rise in frequency shortens the waiting times of passengers at stops and vice versa) suggests that frequency reductions on heavily used bus routes will lead to reduced passenger use due by lowering the opportunity and propensity to travel.
44. Similarly, the return to pre-Covid (or higher) levels of car use has resulted in increased congestion. To address this some urban services that previously travelled cross-town have been split at central locations to allow the second half of the leg (now using a different bus) to start on time, even if the arriving bus is late.

45. The combined effect of external influences on the industry and internal responses to change offer a plausible explanation for the protracted and stalling recovery in bus passenger numbers overall.
46. The COVID-19 Bus Service Support Grant (CBSSG) funding, followed by the COVID-19 Bus Service Support Grant Restart (CBSSGR) and now the Bus Recovery Grant (BRG) funding from Government saved many operators from serious financial problems and potential closure. However, the expected cessation of this grant in March 2023 has led to concerns over there being the risk of a serious reduction in bus services at this point as operators reassess the commercial viability in the light of the current level of demand. ECC has been working with bus operators to address this for example by continuing to base its ENCTS reimbursement to bus operators on pre-Covid levels of payment, while reserving the right to review these levels if service reductions lead to significant number of people unable to make the journeys they need. So far this has resulted in 'service thinning' – that is frequency reductions and service route revisions, but not wholesale withdrawals. Whether this approach can survive the withdrawal of central funding and the normalisation of concessionary fare reimbursement remains to be seen and poses a real risk of further service withdrawals.
47. The DfT also offers a fuel duty rebate to commercial bus operators, called Bus Service Operators Grant (BSOG) which returns a proportion of fuel duty to commercial bus operators. Operators are not allowed to claim for most contracted service, with ECC instead receiving a grant (fixed since 2013) of about £1.1m, which is ringfenced to be used on local bus services. Both Bus Back Better and more recent communications from DfT have indicated their intention of reviewing the process and application of BSOG, however, as at time of printing no details of this proposed review have been issued.
48. Many semi-rural and small-town networks are dependent upon school peak movements to cover the fixed costs of the route or are operated at marginal cost in combination with batches of either school contracts or local bus tenders. As legislation protects consumers from monopolies by forbidding operators to cross fund (support one route with funds obtained from another) changes in these travel patters (for example home to school journeys) can therefore have a knock-on effect on services.
49. The bus industry is working proactively to encourage passengers to return, and to attract new passengers, by giving reassurances regarding safety and cleaning to allay fears about the spread of the Covid virus. This said, and most importantly, passengers need to see reliability, journey times and punctuality improved.
50. Bus Service Improvement Plans, Enhanced Partnerships and joint investment will be key to the recovery and growth of commercial services. However, the current state of the bus market both in Essex and nationally has exercised a severe dampening effect on their appetite and ability to make large scale capital investment or take revenue risks without guarantees or external intervention.
51. Similarly, ECC in common with most other LTAs face their own funding gap – ECC has a growing funding gap for 2023/24 onwards, so is unlikely to be able to make a commitment to the levels of investment needed from its own internal resources.
52. This leaves three remaining sources of potential funding:

- First comes Central Government funding such as a second tranche of BSIP funding or another Zero Emission Bus Regional Area (ZEBRA) grant bid. However, this relies on the government having funding available at a time when it is itself facing a funding challenge.
 - Second is developer funding through section 106 and similar planning backed arrangements. Given the level of development planned for Essex this should, in theory offer a significant source of funding for public transport investment. However, in practice the limits around the uses to which such funding can be put (with a strict focus on the immediate area of the development, a lack of clear central government guidance over what a developer's reasonable expectations of funding for bus services should be, the severe difficulties encountered by planning authorities in developing and passing acceptable Local Plans, the long build times for larger developments and the developers ability to appeal funding claims on grounds of viability), serve to restrict the quantity, certainty and flexibility of such funding.
 - The third potential source is in the form of more radical measures to rebuild the current transport paradigm, in the form of road user charging (such as the low emission or congestion zones as championed by London, Nottingham, Oxford and others) and/or workplace parking charges. In principle, these measures can offer the opportunity to generate sufficient funding to both build a new and effective bus network and support it until, it becomes commercially sustainable. They are however politically difficult and require the building of a wide consensus approach to enable their adoption, all of which take time and significant long-term commitment.
53. As a result, there are significant obstacles to generating the level of investment needed to make major improvements to the bus network and those that are potentially available require a time scale that limits the opportunities to make an immediate impact. As a result, while it is still possible to identify and plan for longer term measures, in the short term, smaller scale and incremental improvements may offer the most realistic way forward.

Summary

54. The commercial bus market in Essex remains at risk of significant instability, with improving but still limited recovery toward post Covid use levels, the return of peak period congestion and subsequent reliability issues, an ongoing risk of further commercial service reductions prompted by the expected withdrawal of significant levels of public sector support funding in March 2023. As a result, the appetite for investment remains limited and will require external stimulus to make investment in Essex an attractive proposition. This will require long-term commitment to new bus priority measures to improve reliability and reduce bus journeys times to attract passengers, increase revenues and bring investment into the network.
55. ECC has limited ability to respond from its own resources due to ongoing financial pressures and developer funding has limitations. There remain more radical measures around demand management to generate the funding needed to improve bus services, although these have both have both political and practical consideration and require careful management to succeed.

Section 4 - Overview of Contracted Service changes since November 2021

Overview

56. As set out in the Essex BSIP, ECC has a strong track record over many years of supporting non-commercial local bus services across the county by contracting services. In 2022/3 this entails a net investment of around £10.4m, which is both in actual and proportionate terms much higher than the level of support offered by comparable regional authorities (and this is on top of concessionary travel reimbursement). Overall, some 200 contracted services are operated, covering more rural, evening and Sunday operations. As noted above ECC also received a £1.1m ring-fenced grant from DfT replacing BSOG claims, which cannot be made for contracted services. Both the BSOG for commercial operators and the grant to ECC are an integral part of the business model for delivering bus services, reducing running costs and effecting the commercial viability of bus services across the county. Indeed some services that are currently viable would cease to be so if BSOG was no longer provided, ECC will therefore need to look carefully at any proposals to assess their impact.
57. Since the issue of the Essex BSIP and Enhanced Partnership, the first stage of a network review in Uttlesford has been completed, combining pre-existing ECC funding in the district with S106 related to specific developments to fund new and extended services. This has led to new journeys being made available to residents, higher frequencies along existing journeys and increased access to service centres and amenity sites. Services have also been renumbered to offer greater consistency and roadside information has been improved.
58. In other areas the position has remained largely stable, with no contracted service withdrawals and a small number of additional contracts being taken on to cover commercial losses.

Reliability, service availability and service rationalisation

59. ECC's contracted services have faced the same reliability and availability issues as the commercial market, with staff shortages (both industry structural and temporary illness based), congestion and the very large number of road works being carried out across Essex, have led to sub optimal reliability and punctuality. In a few cases, mobilisation times for operators following contract tenders have also posed a challenge.
60. While operators in general have tended to run contracted services in preference to their own commercial services, in some areas where there is a very limited commercial bus sector and where heavy reliance falls on a few key operators these issues have led to significant service instability and journey losses. This has in turn impacted on passenger confidence.

61. ECC has worked hard with bus operators to address these issues and by mid October 2022 many of the most pressing (such as structural driver shortages) had largely been addressed. However, the situation remains fragile and a major proximate issue (such as another severe Covid outbreak) could destabilise it again.
62. The difficult economic outlook faced by the UK is reflected in Essex. The legacy of Covid in reducing local authority income, increasing expenditure commitments due to demographic issues (such as the increased need for adult social care and support for younger people with special needs), the high level of inflation and rising interest rates are all putting severe pressure on ECC's budget. As such it is unlikely to be able to pick up a significant number of additional loss-making services should they be withdrawn without in turn having to balance limited resources by withdrawing some currently supported services.
63. There is a process for doing this as set out in the Essex Local Bus Service Priority Policy. This sets out a protocol for withdrawing services if there is insufficient funding and passenger demand to meet all needs, based on services categories and cost per passenger journey.

The Essex Bus Fleet

64. The situation with the Essex bus fleet remains broadly unchanged from the position in 2021. Natural turnover has removed some older vehicles from the fleet and introduced younger vehicles. In addition, a significant number of vehicles have been refurbished as a result of network revisions by First Essex Buses. Around 20 older double deck vehicles have been phased out and replaced by newer Euro VI compliant vehicles in the south of the county.

Section 5 - Summary of BSIP commitments and overview of delivery

65. In 2022 ECC has focused on delivering three main themes from its BSIP. These are:
- Completing the 12 area-based Wholesale Network Reviews, one for each district, borough, or city in Essex, aimed at identifying key infrastructure, connectivity and service requirements and opportunities at a local level. This has been a very large task and required significant investment in specialist resources to carry out. The reviews have now been completed and are included as Appendices to this document.
 - Continuing to develop five Major Transformational Projects.
 - Developing new approaches to ECC policy and practice to support the bus network.
 - Delivering its first, countywide Enhanced Bus Partnership with operators. This was a complex task requiring working closely with bus operators and public consultation within a tight legal framework. This is covered in Section 6.

The Twelve Wholesale Area Network Reviews

66. The major workstream carried out during the first year of the BSIP has been the delivery of twelve district-based wholesale area network reviews. Each area network review comprised the following elements

District Network Audit

Overview

67. Each District Network Review focuses on identifying and understanding the core district geographic and demographic characteristics, including population, level of deprivation, bus patronage, passenger travel patterns and demographic characteristics, broader travel data, general accessibility by bus to key services and air quality.

68.

Network Assessment

69. Assessment of a range of factors that affect the functionality and attractiveness of bus services in each area. The audit divides the network into three service categories:
- Key Bus Corridors.
 - The Wider Supporting Bus Network.
 - Low Accessibility Services.
70. For each category the audit developed a picture of the bus network, including commercial and supported services to understand current service commerciality and vulnerability, passenger flows and use levels frequencies, journey times and service

reliability, fare structure, intra-bus and cross modal service connectivity, DRT provision, cross boundary services and key out of district amenity centres

- Bus fleet vehicle quality and standards – the audit assessed the quality of the local bus Fleet including, average vehicle age, Euro emissions standards, audio visual aids, CCTV, and real time live tracking capabilities.

Bus infrastructure inventory

71. For each category each district audit has undertaken

- An inventory of bus priority measures in place, traffic signals, bus lanes and gates, all referenced to key corridors.
- An inventory of roadside infrastructure across the network, including: the number, location, and state of flags and poles, timetable cases, passenger shelters and real time information screens with replacement age and value.
- Created an inventory of supporting facilities including bus stations, interchanges and transport hubs along with any identified improvements

Road network and parking audit

72. For each of the categories, the district audit has identified key road network and parking supply characteristics. These include traffic data, identifying congestion levels and journey reliability data, bus journey time data, including variability across the day and week, congestion hotspots and traffic pinch points.

73. The district audit also identifies parking availability and charging frameworks, off road car parking capacity, site ownership, average charges per day, comparison to average bus fares in the district, availability of on street parking, any special parking restrictions/residential parking schemes or school zones in place and identifying areas or roads where car parking affects bus service operations.

Community Transport audit

74. For the district audit we have worked with CT providers to identify the scope and scale of CT operations. This includes the provider(s), the types of transport offered, the number of members and of passenger journeys carried out, the level of funding from ECC and other sources, the financial stability of the service, licensing issues and any limiting factors on extending service provision.

Recommendations

75. Each Area network Review makes a set of recommendations, addressing, the bus network (including new or revised services, use of Demand Responsive Transport and Community Transport), bus priority & road space allocations, supporting infrastructure (including for, bus stations, interchanges/hubs, roadside and carriageway), fares, local signage, park and ride, turn up and go services, solutions for rural areas, hub models and developing better links to railway stations, schools, health, social care and employment, isolated housing, out of town industrial estates, factories, estates.

Contents of the comprehensive area network reviews.

76. A copy of each of the 12 area networks reviews is published on ECC's website here: <https://www.essexhighways.org/bus-strategy>

Major Transformational Projects

77. In the 2021 BSIP ECC set out proposals and bid for Department for Transport BSIP grant funding to progress five major Transformational Schemes that offer the chance to deliver a step change in the scope and quality of public transport in Essex. These are:

- **Basildon Volt**, a town centre transformation project. Investing in one of our strongest bus networks to showcase what a gold standard service can look like, and to drive green growth and passenger satisfaction to establish a model for other Essex towns. Working with operators to deliver a zero-carbon fleet. Involving the introduction of wide scale bus priority measures to improve reliability, reduce journey times, offer better service and modal integration through hub development and improve roadside infrastructure. Operators would invest savings from reduced journey times and reliability to improve the age, quality and comfort of their fleets, improve frequencies, and times of operation, and offer better value fares.
- **Clacton Connect**, an urban levelling up project, to transform access to education, skills, and jobs for residents. Bringing better connectivity to a coastal community to help residents improve their opportunities. Improving the availability and quality of bus services in a settlement with high levels of deprivation. This will improve bus facilities, priority, and integration across the town, offer better modal interchange, and service information, combined with service branding measures. Operators will invest savings from reduced journey times and reliability to improve the age quality and comfort of the bus fleet, improve frequencies and times of operation, and offer better value fares and a long-term marketing approach.
- **Harlow Falcon**, a BRT scheme improving connectivity between garden villages and the town centre, running into a newly developed bus station. It will include priority measures and roadside infrastructure, better information systems, optimised to bring the maximum benefit to existing town networks, and promoting modal shift across the town. It would provide rapid access to business, commercial, retail, health and education centres and include the potential for developing or connecting to key hub locations on urban perimeters.
- **Thrive**. A Market Town viability project. For public transport in Essex one of the major issues is the commercial viability of bus networks in smaller market towns. Many of these services were operating on the edge of commercial viability prior to the COVID-19 pandemic, with a strong reliance on concessionary bus pass users. There is significant risk of these services being withdrawn as government support is phased out.
- **Reach**. Expanding our D-DRT services to offer everyone a journey. This accessible service uses Digital Demand Responsive Transport to improve access to key services, and the wider transport network, for people who live in locations where there is currently limited access. These are mainly rural areas, but also include some urban settlements. This project will develop DRT schemes managed through a single digital

passenger phone application. It will transform the demand responsive offer in Maldon, the Dengie Peninsula, Uttlesford and Braintree by rolling out a new digital platform to enable rapid on-line booking, vehicle tracking, and a more efficient point to point service. It will expand the service geographically and attract new passenger groups.

78. Since the delivery of the first EP, the council has identified a sixth potential Transformational Project, to develop a Bus Rapid Transit (BRT) project for Colchester. This aims to link the new Tendring and Colchester Borders Garden Community and the eastern quadrant of the city with the city centre, the university, the hospital and other key attractor sites as far as the Park and Ride site and the football club ground. Like the Harlow Falcon it will look to include bus priority measures, improved on street infrastructure, integration with other sustainable travel modes, improved information, ultra-low or zero emission vehicles, affordable fares and frequent, high speed cross city journeys, aimed at mitigating the impact of the development and encouraging the use of public transport as the travel mode of choice for journeys along its route.
79. Essex put in a bid totalling over £700m from the Department for Transport to support this ambitious programme, but in the event and in common with two thirds of LTAs in England did not receive any funding. The Department for Transport have not made clear the basis on which funding was awarded or why Essex did not receive a share.
80. Given this it has not been possible to make quick progress regarding any of these proposed schemes. However, in 2022 the Department for Transport has allocated £666,000 to ECC from its 'Enhanced Partnership Officer Funding' to support staffing and resources to draw up infrastructure plans and behaviour change initiatives. ECC had also received £100,000 in BSIP support funding in April 2021, £776,040 in July 2021. This brings the overall funding received from this source to £1,542,040.
81. ECC has used this funding to help strengthen its ability to deliver better bus services across Essex in general. This includes:
 - Creating an Enhanced Partnership Lead, to progress the current Enhanced Partnership and develop the new district based Enhanced Partnerships.
 - Undertaking the 12 area-based reviews to allow the development of area based Enhanced Partnerships.
 - Developing, procuring and rolling out a single TravelEssex portal to offer a one stop portal for all Essex-wide bus information.
82. Given the size and scale of the transformational bids, it is not possible, in the current economic environment for either ECC or the Bus operators to undertake these projects without external financial support, either from the government or for example from developer funding (where this can be legitimately required). ECC therefore intends to continue to seek funding to support its Transformational bids. This includes applying through any future Zero Emission Bus Regional Area (ZEBRA) funding bids to support the Basildon Volt scheme, (and potentially other areas) follow up bids for any second round of BSIP funding working within other central government funding frameworks (such as the Housing Infrastructure Fund (HIF) or the Levelling Up Fund (LUF)).

83. ECC will also continue to look for additional avenues to secure funding for these projects including from major developments and through the Local Transport Plan (LTP).

Bus Infrastructure Delivery since November 2021

84. Despite the lack of central Government funding Essex has continued with its programme of minor works aimed at producing incremental improvements to the bus network at a local level . These schemes were identified in consultation with bus operators and carried out by Essex Highways.
85. The completed Schemes are set out in Table 6 below:

Table 4 – Completed schemes

Number	Location	Issue	Intervention
1	Basildon, Broadmayne	Cars parking on bus stop	Bus stop cage provided
2	Basildon, Lincoln Road	Cars parking in 3 bus stops	Bus stop cages provided
3	Basildon, Long Riding	Bus gate abused by general traffic	ANPR camera fitted and fines issued
4	Basildon, The Knares	Cars parking on Bus stop	Bus stop cage provided
5	Bocking, Church Street	Bus unable to align with kerb for boarding	Bus stop cage provided
6	Braintree Bus Park	Assorted issues; insufficient stands, safety issues, lack of bus passenger infrastructure	Bus Park rebuilt and re-opened, providing greater capacity and more facilities
7	Braintree, Manor Street	Inconsiderate parking can prevent buses accessing bus station.	Revised parking layout introduced
8	Brentwood, Doddinghurst Road	Resident parking issues – hinders through access and access to stops.	Selection of TROs installed to manage parking and access better

9	Brentwood, Kings Road	Long extent of parking, creates congestion and affects bus reliability / journey times	Parking area reduced, to improve accessibility for all modes
10	Brightlingsea, Bellfield Avenue	Cars parking in bus stop layby	Bus cage installed
11	Broomfield, Hospital Approach	Queues on roundabout hinder bus access to hospital site, affecting reliability and journey time	Roundabout and associated road layout has been remodelled, to improve access
12	Canvey Island, Link Road	Cars parking across 3 bus stops, hindering access for passengers	3 bus stop cages implemented
13	Canvey Island, Point Road	Car parking on roundabout hinders buses turning	TROs and parking restrictions installed to facilitate bus turning movements
14	Chelmsford, Alan Cherry Drive	Buses wait excessively for green phase.	Phasing of signals reviewed, to improve bus access.
15	Chelmsford, Broomfield Road	Green phase on signals too short for volume of buses using bus gate	Additional green time added into bus gate phase.
16	Chelmsford, Woodhall Road	Buses mount kerb on sharp left turn	Kerbing realigned to remove the issue
17	Clacton, Coopers Lane	2 bus stops difficult to access	Revised bus stop layouts
18	Clacton, Ellis Road	Car parking on bus stop	Bus cage repainted
19	Clacton, Flatford Drive	Car parking on bus stop	Bus stop relocated and cage installed

20	Clacton, Marine Parade West	Car parking on bus stop	Bus Stop cage repainted
21	Clacton, Station Road	Bus stop layout and proximity to parking hinders passenger access to buses	Bus stop remodelled to provide increased accessibility for buses to boarding kerb
22	Colchester, Crouch Street	Two opposing loading bays block through access	Loading bays amalgamated into one – change of TRO
23	Colchester, St Andrews Avenue	Nearside kerb line tight for buses turning	Kerb line realignment
24	Dovercourt, Abbott Road	Cars parking on bus stop	Bus stop cage installed
25	Dovercourt, Fryatt Avenue	Cars parking on bus stop	Bus Stop cage installed
26	Finchingfield, B1053	Cars parking on unmarked bus stop	Bus Stop formalised
27	Great Baddow, Foxholes Road	Car parking in residential area prevents bus access	Resident parking scheme and increased use of parking restrictions introduced
28	Harlow, Partridge Road	Cars parking on bus stop is an issue	Bus stop cage installed
29	Harlow, Tumbler Road	Cars parking on bus stop hinder access	Bus stop cage installed
30	Harlow, Velizey Avenue	Cars abusing bus gate.	ANPR cameras installed

31	Heybridge The Street	Bus stop too small to accommodate bus	Bus stop cage extended
32	Laindon, Laindon Link	Cars abusing bus gate	ANPR cameras installed
33	Lawford, Cox's Hill	No bus stops for large development	2 new bus stops provided
34	Maldon, Wycke Hill	Bus access to private road issue	Permission secured for continued bus access
35	Pilgrims Hatch, Larchwood Gardens	Parking issues around school hinder bus access	Revised TRO's refreshing of lines to improve access
36	Pilgrims Hatch, Elizabeth Road	Resident parking hinders through access	Package of parking restrictions and passing points introduced
37	Rayleigh, Bull Lane	Car parking on bus stop is an issue	Bus stop cage installed
38	Shrub End, Hazell Avenue	Cars Park on bus turning circle	Parking restrictions installed
39	Sible Hedingham, The Street	Cars parking on bus stop is an issue	Bus stop cage installed
40	Takeley, Roding Drive	Car parking on bus stop is problematic	Bus stop cage installed
41	Takeley, Warwick Road	Car parking on bus stop hinders bus access	Bus stop cage installed

42	Thundersley, Kiln Road	Buses perceived to get insufficient time on green signal phase	Lengths of traffic signal phases adjusted
43	Waltham Abbey, Honey Lane	Buses unable to serve stop due to parked cars	Bus stop build out and parking restrictions introduced
44	Walton on the Naze, Naze Park Road	Cars parking on bus stop hinders elderly access to/from the bus	Bus stop cage installed
45	Wickford, Beauchamps Drive	Cars parking on bus stop at school times	Bus stop cage introduced and increased patrols
46	Witham, Forest Road	Bus stop not big enough	Bus stop cage extended
47	Witham, Laurence Avenue	Buses unable to serve stop	Bus stop cage introduced supported by parking restrictions
48	Witham, Newland Street	Bus stop too small to cater for number of departures	Bus stop extended and assorted reallocations of road space via TROs
49	Wivenhoe, High Street	Extended length of parking hinders bus through access	Pull in area provided, to also improve accessibility to Library

86. While these schemes may appear relatively small scale, each has made a definite contribution to enabling bus operators delivering services for the public on the routes they affect and helped to improve the reliability and accessibility of services. Other similar schemes are planned for 2022/23
87. As such this raft schemes represents the ongoing commitment of ECC to supporting the bus network from its own resources.

Developing new approaches to ECC policy and practice to support the bus network.

Development of the TravelEssex brand and the first single Essex portal

88. Findings from Essex County Council's own behavioural change analysis show that the cognitive load required to switch from car to bus is high and access to information was a major factor. A clear bus identity for Essex was the first step to improving the information and this has been completed.
89. Following two pilots and a residents survey an overarching brand name for buses has been chosen, in partnership with the bus operators via the Enhanced Partnership Group. The brand name is TravelEssex. Four concepts were developed and following a further public survey the following brand was chosen.



Figure 1 - Travel Essex Logo

90. This single brand identity for the Essex bus network is being introduced on all bus and roadside infrastructure: operators are displaying it on their services, it is on all roadside printed timetables and there is a five-year program to replace all bus stop flags with the new logo. It will be seen everywhere, and residents and visitors will associate it with the Essex bus industry.



Figure 2 - Bus Stop Flag with the new Travel Essex Logo

91. In addition, a new Essex-specific, multi-modal journey planning app has been introduced. It has been marketed and is currently used by 17,585 residents to plan their journeys by bus, walking, cycling, train or other sustainable methods: or in combination.
92. Finally, following market engagement and a two-stage procurement, a contract has been awarded to a specialist digital information and systems provider, for the

development and maintenance of a new TravelEssex Information Portal. This user friendly and engaging webpage will act as a front end, bringing together data that is stored at different physical locations and on servers distributed across Essex's diverse Operator and Central/Local government information sites. The project will also introduce a secure data transfer area specifically designed to improve security and speed of communication between operational teams and suppliers, while reducing officer time spent sending information manually.

Park and Ride and the shift to Park and Chose

93. The strategic aim of Essex Park and Ride (P&R) services is to reduce congestion by and emissions by intercepting traffic bound toward city and town centres. Before the pandemic the primary target audience was the longer stay commuter. Passenger numbers were strong and peak journeys were early morning and late afternoon. The two Chelmsford sites together were close to breaking even and the younger Colchester site saw annual growth.
94. As a result of COVID-19, people's behaviour does appear to have changed: people continue to work from home and commuter journeys have not returned to pre-COVID levels. Passenger figures for Park and Ride reflect this, not having returned to the pre-COVID volume. In addition, and in line with national figures, concessionary bus pass use, (primarily by older people) has not recovered. Colchester has shown the strongest recovery but even here passenger numbers are only 50% compared with 2019 figures.
95. In response to these trends a new strategic approach has been developed to put more weight on attracting anyone intending to visit the city centres for longer than two hours. A new three stage approach has been drafted which outlines how these sites will become income funded, not taxpayer funded:
 - Phase 1: re-shape 'post-COVID'.
 - Phase 2: recovery: return Chelmsford to surplus; return Colchester to reducing subsidy requirement
 - Phase 3: growth – including achieving net neutrality across the three sites as a whole
96. Phase 1 has commenced. We are currently consulting on changing the ticket pricing to target everyone staying in the city centres longer than two hours: the P&R ticket pricing was originally set to compete with the long-term car parking costs. We are also consulting on a discounted off -peak ticket to encourage further increased patronage.
97. In addition, a comprehensive marketing strategy, aimed at highlighting Park and Choose as a viable alternative for visitors to taking your car into the town centre including a behavioural change program and working with local businesses, will be put in place to inform residents on the changes and the benefits on the environment to using the service. Plus, we are continuing to work with Chelmsford City Council and Colchester Borough Council to align their parking strategies, so all commuters and visitors have the option to avoid driving into the city centres and instead use the P&R services.

Furthermore, the sites are continued to be used for commercial opportunities, including, all three sites now have regular income from weekly boot sales,

Rural Mobility, DRT and Digital DRT

98. Using Rural Mobility Funding from the DfT, two Digital Demand Responsive Transport services, branded DigiGo, were launched on 01 April 2022. DigiGo is a shared, on-demand service, similar to Uber Pool. It utilised six fully electric vehicles, all journeys are booked and tracked through a journey planning app and the service operates 7 days a week, from 7am until 10pm. DigiGo is rated as five stars by passengers who use the service, with a large number of repeat customers. It has allowed residents in these rural parts of Essex to use the on-demand minibus service to access key facilities: several passengers have said that the service has changed their lives.
99. DigiGo has been designed not to compete with the wider public transport network; in fact, DigiGo feeds passengers to bus and rail stations within the operational area and vastly improves accessibility for residents. Passenger numbers continue to grow each month. The introduction of group booking had a notable impact (42% of journeys with > 1 person) and unusually for a Demand Responsive service which are usually dominated by concessions 62% of the journeys are full fare paying adults.
100. A sustained marketing campaign has ensured that residents in the areas served are aware the service, and there is significant interest from other areas for the service to be introduced to meet rural demands. In response to public requests the two operational areas were merged and the service was expanded to serve additional villages.
101. **Developing the Stop.Swap.GO! bus pilot**
102. Although lack of funding for BSIP prioritised transformational projects from the Department for Transport, continual financial pressure on ECC itself and staff recruitment issues have affected our ability to progress the full range of Stop.Swap.Go measures originally intended, we continue to look for funding opportunities to progress the plans laid out in the BSIP

Bus Shelter Transformation Project

103. The Shelter project will establish a long-term contract to create a better bus shelter estate, incorporating all maintenance, cleaning, replacement and supply of shelters – all paid for from the generation of income through advertising.
104. The project is anticipated to deliver following benefits:
 - **A modernisation of the estate** – bring shelter provision into the 21st century, improving customer experience for residents - and by extension increased and sustainable bus patronage
 - **Ability to expand the bus shelter network** – through commercial income, resulting in residents being more likely to benefit from their use and protection from the weather elements
 - **Planned, programmed and sustainable cleaning regime** - offering a better bus stop experience, aiding efforts to increase sustainable transport journeys
 - **Estate rationalisation and reduced street clutter** – improved street scene environment for residents and improved accessibility

- **Income leveraged from advertising** - replacing taxpayer funding with commercial funding.
105. This project is being delivered in collaboration with District, Borough and City council colleagues and involves a complex and vast network of locations to pull together, requiring extensive legal discussions and negotiations. This large, complex project will see c1,300 shelters being brought under one contract.
 106. Significant progress has been made. The Collaboration Agreement between ECC and the partner authorities has been agreed, together with the Heads of Terms for an agreement land transfers. The council continues to engage with the market, post COVID the recovery in advertising sales is positive and the Council is preparing to undertake the procurement of a service provider in the new year.

Transforming Policies

Transport modelling

107. ECC used an accessibility mapping tool as part of its area reviews to allow it to better understand the connectivity to key services and amenities by bus for people across the county. This measures the travel time by public transport for residents to service centres for amenities such health, employment, education and shopping. Data is collected by the Office for National Statistics (ONS) from census and other sources. Using this methodology allowed us to identify areas with both good and poor accessibility and was built into the area reviews.
108. ECC has also been looking at options to improve its public transport modelling capacity to give a better understanding of the challenges to and opportunities for improving bus travel including the ability to build in new developments and add virtual networks, allow for demand responsive transport and sustainable travel as well as to better model the impacts of traffic speeds and congestion. To this end we have opened dialogues with a number of potential service providers to develop a more sophisticated modelling suite which allows databases of vehicles, passenger transport modes and cycling and walking activity to be incorporated within base and forecasting modelling packages.
109. We have also worked with operators to develop an impact tool to allow them to feed in the potential impacts of infrastructure projects. This will enable us to understand those impacts and either take mitigating actions or make fully informed decisions on how to progress projects.

Route Hierarchy

110. ECC first established a functional route hierarchy in 2005. Several policies, including speed management, are based on this hierarchy.
111. At the time the hierarchy was developed, priorities were focused on reducing congestion and journey times for the private car. As a result, the hierarchy is one dimensional, and doesn't allow for consideration of the function of a place.
112. The functional route hierarchy is now being reconsidered to reflect the changes in Government priorities and the new Essex transport vision, Safer, Greener, Healthier,

with focus on the function of a place, as well as the movement function, to ensure the most appropriate activities for different areas and routes can be prioritised. The revised hierarchy should act as a multi-dimensional tool influencing other policies to help achieve visions for streets and places across Essex. It will consider the movement of all people and balancing the priorities for each route / area to support the vision of a more sustainable transport network for the future.

113. Initial work has been started on developing a new road hierarchy based on the 'place and movement' approach adopted by several other local authorities including Hertfordshire and Nottinghamshire County Councils. Work is at an early stage but will continue across the next year.

Roadworks

114. We are reviewing our approach to managing permit applications for roadworks. Road works have a significant impact on bus services. Ensuring they can run as full a service as possible minimises disruption for passengers and ensures essential journeys can be made.
115. ECC has begun discussions with utility and other road closers over developing a better management system for such closures to improve their responsiveness to bus needs.
116. This would include ECC charging a closure fee for each bus stop that has to be suspended due to a road closure and ringfencing this money to:
- Allow for the proper management of the impact of road closures on bus services and liaison between operator and the closing body to help, mediate best outcomes.
 - Fund replacement shuttle services when no other option for providing bus services is available.
 - Continue to work on the introduction of digital bus map tools to help those working on the highway identify which services are impacted, and a hierarchy of solutions to help ensure that journeys can continue to be made.
117. Discussions are ongoing but it is intended that they are progressed over the next year.

Healthy School Streets

118. Following discussions with Norfolk County Council who have pioneered a healthy school street programme in their county, ECC officers have begun to develop a strategy for Essex County Council's Healthy School Streets programme. This aims to create public environments around schools, where most pupils walk, scoot or cycle all or part of the way there. By working on assorted measures, the journeys to school can be made as safe, green and healthier for all, including bus users. Consultation with the wider community is expected to begin in 2023/24.

Procurement

119. Work has continued to develop an initial set of questions to ask the market when purchasing services and understanding how to measure the impacts of service delivery on the climate.
120. This is likely to initially focus on information gathering over the potential and impact of changes to procurement terms on service delivery and the market as a whole.

121. Once this has been established ECC will work with its suppliers to develop a suitable and manageable set of service specifications with the potential of setting a minimum standard of vehicle for purchased transport services. A dedicated Procurement Lead for Climate is working closely with the Essex Climate Action Commission to embed climate quality within all procurement.
122. In 2020/21 ECC tested the introduction of carbon reduction specifications through its Park and Ride procurement. The three Essex Park and Ride services were procured with a 20% weighting attached directly to the climate agenda. Specialists developed quality questions around efficiency measures and the recovery of braking energy, as well as technology and operational practices across the life of the contract, which would see a reduction in greenhouse gas emissions and air pollution.
123. Research prior to the tender showed that the market was not able to move towards fully electric vehicles at this time, due to direct costs associated with purchasing and charging electric buses. However, highlighting to the transport market that climate change is at the forefront of our future strategy will provide a clear signal of our long-term ambitions.

Devolution policy, giving people control over how services are run

124. Devolving more to communities. The principle of devolution is that services are best commissioned and delivered close to the communities they serve, so they can reflect the needs of that community, and are as cost effective as possible.
125. Currently, supported local bus services are commissioned and funded by ECC. Where no commercial bus service is provided, ECC's role is to assess whether a service should be provided and if it decides it should be, to make such a provision.
126. In the December 2018 Consultation on Evening and Sunday services, ECC consulted over devolution policy. We are now looking for suitable pilot services where we can test a devolution approach.
127. ECC continues to explore options for devolving some aspects of transport provision (and where appropriate funding) to local councils and voluntary bodies to provide ultra-localised transport services. Options under consideration include:
 - Additional, project specific funding for community transport and community bus schemes.
 - Grants to parish and town councils for specific projects.
 - Working with voluntary and community groups to develop new approaches to delivering transport needs
 -

The Local Transport Plan

128. Each LTA's Local Transport Plan includes its policies for the promotion of safe, integrated, efficient transport facilities and services to, from and within their area. These policies must meet the needs of people living or working in the authority's area, visiting, or travelling through, including the transportation of freight.

129. ECC is currently preparing its fourth Local Transport Plan (LTP4). Bus Back Better (the National Bus Strategy) requires the BSIP to be reflected across its whole policy and programme suite of each authority's LTP. There have also been indications from the Department for Transport that transportation schemes, projects and bids of all types which do not support and make allowances for bus services will not be successful.
130. Development of a new LTP is ongoing and requires commitment and consultation. Options have been examined to develop a revised LTP in stages, starting with a 'Strategic Framework' for transport that creates a vision, outcomes, and strategic approach. This will define the role transport plays in the delivery of the emerging ECC Organisational Strategy and align transport policy in Essex with Government priorities. It will include those set out in Bus Back Better. This process has been designed to be implemented in line with the timescales for the submission of this BSIP and can be found here.

Section 6 - Review of delivering the Essex Enhanced Partnership

The Countywide Enhanced Partnership Agreement

131. On 1 April 2022 ECC issued its first Enhanced Partnership (EP) scheme covering the period 2022 to 2027. This consisted of two elements, a partnership plan, setting out the wider strategy and the partnership scheme setting out the specific measures to be undertaken.

132. Table 7 sets out the BSIP objectives and approaches.

Table 5 – BSIP Objectives and approaches

BSIP Objectives	EP Approach
Rebuilding the Essex bus network to recover from the impact of the Covid 19 pandemic	<ul style="list-style-type: none"> • To improve customer information and make bus travel more accessible and attractive • To develop a clear Essex identity for bus travel • To develop a single portal for information and advice
Developing an attractive, sustainable, affordable, bus network offering a realistic alternative to car use for as many people as possible.	<ul style="list-style-type: none"> • To invest in schemes that deliver bus network and service improvements • To seek funding for transformational projects, delivering a step change in service delivery and a zero-carbon fleet; to provide better access to jobs, training and education; to provide a high-quality rapid transit service; to rejuvenate market town services; and to offer digital demand responsive services to those who currently have no access to services • To make improvements to ticketing
To seek funding for transformational projects, delivering a step change in service delivery and a zero-carbon fleet; to provide better access to jobs, training and education; to provide a high-quality rapid transit service; to rejuvenate market town services; and to offer digital demand	<ul style="list-style-type: none"> • To undertake twelve wholesale reviews of the commercial and supported network on a district geography basis and identify opportunities for improvement • To include in those reviews the network (e.g. routes and service frequencies); the supporting infrastructure (e.g. bus priority); ticketing and vehicle standards

responsive services to those who currently have no access to services	
To make improvements to ticketing	<ul style="list-style-type: none"> To identify opportunities for improved vehicle technology and modal shift

133. The scheme identified two sets of obligations, one from set to be undertaken by ECC and one set to be undertaken by the commercial operators. The ECC commitments are:

Measure	Responsibility	Action	Delivery Date
A set of proposals to start to deliver Essex's Bus Service Improvement Plan	Essex County Council	ECC in partnership with operators to develop the five transformation proposals set out in part two of the investment strategy in the Bus Service Improvement Plan. ECC to seek investment from Department for Transport. Delivery is dependent on funding from Department for Transport.	Ongoing
Improvements to customer information and the accessibility and attractiveness of bus travel	Essex County Council	To develop a single Essex brand for the bus network and to use it on ECC digital and physical assets	July 2022
		To develop a single branded portal which includes links to bus information, journey planning tools, maps, bus stop information	October 2022
		To develop and launch a joint marketing campaign with operators	July 2023
To progress improvements to the supported local bus network in Essex	Essex County Council	Develop proposals relating to the supported bus network in Uttlesford. These proposals will need to be subject to consultation.	July 2023
A wholesale review of the commercial and supported networks,	Essex County Council	The diversity of the Essex networks means that not all the following will be applicable, however the reviews will consider the following and propose district level plans:	December 2022

<p>including ticketing and fares and vehicle standards.</p>		<ul style="list-style-type: none"> • Simple flat or zonal fares within towns and cities • Bus priority measures • Control of roadworks • Bus lanes on roads with space where there are frequent bus services and congestion • Traffic signal priority • Bus gates • Signage • Sustainable travel corridors • Bus stations • Park and Ride • Turn up and go services on urban routes, running at frequencies at which no timetable is required, plus evening/Sunday provision • Solutions for rural areas • Hub models • Linkage to railway stations, schools, health, social care and employment, isolated housing, out of town industrial estates, factories, estates • Hub and spoke and feeder service models • Route simplification • Demand responsive models • Options for improving punctuality and reliability • Setting daytime, evening and Sunday service levels • Consistency of routes into evenings and weekends • Vehicle standards • Fully meeting latest accessibility standards 	
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		<ul style="list-style-type: none"> • Provision of visible and audible information • Wi-fi and charging on key routes • Parking provision 	
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134. The commercial bus operator commitments are:

Measure	Responsibility	Action	Delivery Date
To improve customer information and make bus travel more accessible and attractive	Operators	To engage with the development of the single Essex brand	July 2022
		To use the brand on digital and physical assets (e.g. buses) in a light touch way e.g. vinyls not wholesale re-livery and at a suitable and agreed scale	April 2023
		To provide suitable material and links as agreed to populate the Essex information portal	October 2022
		To develop and launch a joint marketing campaign with ECC	July 2023
		To develop and implement a Bus Passenger Charter	July 2022
		To agree a set of common network/timetable/registration change dates per year. Where cross boundary services also form the majority of services in a neighbouring local transport authority the aim would be to align these common dates. Where a neighbouring local transport authority has differing common dates exceptions would be made for cross boundary services if necessary although alignment would be preferred.	July 2022

		When making registration changes to use a common name for bus stops ensuring the ECC database reflects that name and any naming conflict between the two is resolved	Ongoing
		To remove duplicate numbering on any services that run in the same district	October 2022
To work jointly with ECC on the network, ticketing and vehicle standards review	Operators	To work jointly on the network reviews as set out in the authority obligations summary in section above	December 2022
To make improvements to ticketing options and information	Operators	To make All Essex Saver and All Essex Sunday Saver readily available on all ticketing platforms and to publicise the ticket (with a review of operation and apportionment by July 2023)	July 2022
		To standardise the child fare at 16 years as of 31 August in a year (to allow older year 11s to qualify) where a separate child fare is charged	
Reinvesting in an improved network	Operators	Where highway network changes are made that result in resource savings as a result of faster journey times operators will reinvest a proportion of the benefits in more frequent services, or new buses, or other improvements of mutually agreed value in conjunction with local network reviews	Ongoing
Introducing cleaner vehicles	Operators	All new buses are built to a minimum Euro VI emission standard. Where brand new vehicles are introduced within the County, their allocation will be cognisant of local air quality concerns as one of the factors considered within the operator's business case.	Ongoing

The Enhanced Partnership Governance Process

135. The EP also sets out its governance process. This consists of an Enhanced Partnership Management Board (EPMB).
136. The EPMB represents all the parties to the Enhanced Partnership and is the Board which will formally make decisions on the Enhanced Partnership Plan and Scheme. The role of the EPMB will be to:
 - Oversee the delivery of the Enhanced Partnership Plan and Scheme(s),
 - Manage the relationship between the partners
 - Identify priorities and aims/targets or future 'EP Schemes'
 - Identify additional measures that the EP will need to take
 - Identify any additional facilities required to meet the objectives of the EP.
137. The EPMB is made up of:
 - The Chair: A Chair alternating annually between an ECC representative and a representative of one of the operator groups set out below The Director of ECC Highways and Transportation
 - The Head of Integrated Passenger Transport Unit ECC
 - Three representatives from the large bus operating companies (over 250 employees or over £50m turnover)
 - Three representatives from Medium sized bus operating companies (50-250 employees or under £50m turnover)
 - Three representatives from the small sized bus operating companies (50 employees or less or up to £2m turnover).
138. Guest attendees will be allowed at the discretion of the Board.
139. The Board will meet quarterly (January, March, June, September) with additional meetings at the discretion of the Board.
140. Papers will be circulated a week before the meeting. Action points and a summary of discussion will be recorded.
141. Material issues relevant to the Enhanced Partnership Plan and Scheme will be shared with all operators in advance to allow operator representatives to consult with the wider operator cohort.
142. Either group (operators or ECC) may exercise a veto if it is the consensus of that group
143. Decisions of substance or with financial impacts on the authority will be subject to the Essex County Council constitution and governance policies and processes.

Review of EP Scheme

144. Once the EP Scheme is made, it will be reviewed by the Board every six months following publication of data on progress towards targets, as required by the BSIP –

this will ensure any necessary action is taken to deliver the targets set out in the BSIP. Essex County Council will initiate each review.

145. The Board can also decide to review specific elements of the scheme on an ad-hoc basis. Board members should contact the Essex County Council using the following email address: passenger.transport@essex.gov.uk explaining what the issue is and its urgency. ECC will then decide whether to table the issue at the next scheduled meeting or make arrangements for all or the necessary Board members to gather more quickly.
146. Bespoke Arrangements for Varying or Revoking the Enhanced Partnership Scheme.
147. Under powers at s.138E of the Transport Act 2000, Enhanced Partnership Scheme Variations where this section is quoted will be subject to the bespoke voting mechanism also as set out in this section.
148. Changes to or new flexibility provisions under s.138E of the Transport Act 2000 shall only be included in the made EP scheme if they satisfy the statutory objection mechanism as set out in The Enhanced Partnership Plans and Schemes (Objections) Regulations 2018.

Proposer of a variation or revocation

149. Consideration will be given to potential EP Scheme variations, or a revocation highlighted either by a local authority, one of the organisations represented on the EPMB, or an operator of local bus services. The proposer of a variation or revocation should demonstrate how this might contribute to achieving the objectives set out in the BSIP, EP Plan and current local transport policies. Such requests should be in writing and submitted to passenger.transport@essex.gov.uk. ECC will forward all requests onto all EPMB members within 5 working days.

Decision-making Process

150. On receipt of a request for a variation or a revocation of an EP Scheme, Essex County Council will convene the EPMB, giving at least 14 days' notice for the meeting, to consider the proposed variation or revocation proposal. If the proposed variation or revocation is agreed by all bus operator representatives present, and if Essex County Council also formally agrees by taking a formal decision after the meeting, the EP Scheme variation or revocation will be made within seven working days of agreement and the revised EP scheme will be published on the ECC website; or a statement will be issued confirming that the scheme has been revoked. EPMB members that are absent or not expressing a view at the meeting (either in person or in writing) will be deemed to be abstaining from the decision.

Revocation of an EP Scheme

151. If the LTA or another member of the EPMB believes it is necessary to revoke the EP Scheme, the EPMB will be convened as set out in paragraph 24 above.
152. If at any point in the future, any area covered by this EP Scheme is included in a bus franchising scheme, the relevant requirements set out in this EP Scheme document will

cease to apply to areas covered by the franchising scheme, in line with the arrangements set out in the franchising scheme.

The Competition Test

153. Essex County Council has undertaken an assessment of the impacts of the EP Plan and Scheme made on 31 March 2022 on competition for the purposes of Part 1 of Schedule 10 of the Transport Act 2000 and believes that the majority of it will not or is unlikely to have a significantly adverse effect on competition, for the purposes of Part 1 of Schedule 10 of the Transport Act 2000. Portions of the EP Plan and Scheme, particularly related to standardisation, route timetabling, and ticketing, may have a significantly adverse effect on competition. However, the authority believes those portions of the EP Plan and Scheme(s) are justified because:
- They are made with a view to achieving one or more of the following purposes;
 - Securing improvements in the quality of vehicles or facilities used for or in connection with the provision of local services;
 - Securing other improvements in local services of benefit to users of local services; and
 - Reducing or limiting traffic congestion, noise or air pollution.
 - Their effect on competition is or is likely to be proportionate to the achievement of that purpose or any of those purposes.
154. The Competition and Markets Authority has also been consulted on the proposals as required by section 138F of the Transport Act 2000.

Section 7 - Forward Look

155. Continued public funding for bus services .
156. As noted above the bus network in Essex is currently in receipt of significant levels of public subsidy to help it recover from the impact of covid 19. This comprises:
- Funding from central government, paid direct to bus operators in the form of Bus Recovery Grant (BRG) and Bus Service Operators Grant (BSOG a long-standing fuel duty rebate). There is also a proposed national £2 capped single fare subsidy scheme which is intended to run between January and March 2023, in an attempt to persuade former passengers to return to using the bus or potential new passengers to give it a go.
 - Funding from ECC in the form Concessionary Fares reimbursements paid (at the Department for Transport's behest) at adjusted pre-Covid levels, so effectively a subsidy at this point and payments for running non-commercial bus services, contracted for by ECC.
157. Both funding streams will come under pressure during 2023/24. BRG is due to end in March 2023 as is the proposed £2 capped fare scheme. The former in particular has been instrumental in preserving services which might otherwise have been withdrawn. BSOG is hard baled into the current bus industry business model, so significant alterations to it could also have a distinct impact on service viability.
158. Similarly, there are severe pressures on all LTA budgets, partially due to the impact of Covid 19 on revenues, raising demand for services due to demographic changes and the impact of steeply rising inflation. Given that ECC has many statutory duties which it has to provide, there is bound to be pressure on discretionary funding. Concessionary fare reimbursements have as noted since 2022 been paid at a level above that dictated by the number of passengers travelling and there will be pressure to re-establish the clear link between passenger use fare levels and reimbursement that applied prior to 2020.
159. These factors both make it more likely that existing commercially run service will become financially unsustainable and reduce the ability of ECC and other LTAs to intervene to support services which have been commercially withdrawn.
160. This said, the high level of development taking place in Essex does suggest the possibility that a significant level of developer funding could be available to help develop new bus services to meet the transport needs created by them. However, there are limits to the extent that such funding can legitimately be used (for example it has to focus on the development itself and so is of limited use in a wider context). Such funding is also not suitable, due to its fixed nature for the long-term support of commercially unviable services. Such funding is also dependent on the continued buoyant state of the housing market and if there is significant fall in the housing market, it is likely that potential funding from this source will also fall or be postponed.
161. How might the bus market develop in 2023/24?

162. Given the developing situation within the bus market set out in sections 3, 4 and 7 above, it is apparent that the bus market will continue to face significant challenges over the coming year. These include:
- Continued slow recovery in passenger numbers, particularly concessionary pass holders. This as noted above has a range of contributing factors including changes to lifestyle patterns such as home working and home shopping.
 - Ending of central government support funding and pressure on local authority support funding.
 - Impact of inflation both in general and in particular for fuel and staff on the service provision costs.
 - Risk of recession and knock-on effect on the housing market and inter-alia developer contribution funding for new bus services.
 - the commerciality of many services remains uncertain.
163. Issues around the reliability and punctuality of services caused by a range of factors, including national and local staff shortage, (particularly drivers), returned congestion across spread peak periods and significant levels of roadworks.
164. These challenges raise the prospect of significant commercial service reductions across the county over the next year. While changes made in 2022/23 by bus operators have focused on service efficiency and minimised overall service loss, it seems likely that this has gone as far as practicable, so if further service reductions are made these may well result in whole service reductions as has occurred in some surrounding counties.
165. At the same time pressure on local authority funding will make it very difficult for the county council to intervene.
166. On the positive side since September 2022 there has been a small but potentially significant growth in passenger numbers as a whole.
167. To support this ECC will be working with bus operators to develop a positive marketing strategy through its Enhanced Bus Partnership with the aim of both identifying bus travel opportunities for new passengers, encouraging previous passengers to return and identifying new bus passenger markets to attract.
168. As set out above the ECC will also be looking at reviewing a range of policies designed to improve the reliability and hence attractiveness of bus services. These include revising its' road hierarchy, improving the process or dealing with the impact of roadworks and revising policies to obtain funding for bus new services from new development.
169. ECC will also continue to bid for bus funding from central government as this becomes available.

Section 8 - BSIP commitments and targets for 2023/4

170. ECC adopted the following target for the BSIP in 2021:

- Return Service reliability to pre-Covid levels and improve towards Traffic Commissioner Targets
- Return passenger numbers to pre-COVID-19 levels of patronage of 40.7 million journeys.
- Customer satisfaction: Maintain an 86% (2019) overall journey satisfaction rating over what we expect to be a volatile time for the network.

171. It also committed to looking to develop new targets as set out below:

- Improve accessibility figure based on % of population with access to bus services/times of day/days of week
- Produce target % for modal shift (switch from car to bus).
- Climate change and Emissions

172. Given the very difficult background in the commercial bus market, lack of funding for BSIP prioritised transformational projects from the Department for Transport and continual financial pressure on ECC itself, it has proved more difficult than hoped in October 2021 to return the market to its pre-Covid 19 position.

173. Nonetheless there has been a small but noticeable increase in passenger numbers and punctuality has shown some signs of improving over the year.

174. In addition, the area network reviews have only just been completed and it will need time to develop these into plans of action for the future.

175. To develop new targets will also require policies and approaches to be fully integrated within the new LTP.

176. On this basis it is not proposed to alter the targets set out in the 2021 to 2026 BSIP for 2022/23.

Conclusion

177. In conclusion, the year following the publication of Essex's first Bus Service Improvement Plan has been extremely challenging. However, the work that has gone on has achieved the following:

- The making of Essex's first Enhanced Partnership
- The development of the TravelEssex brand and the first procurement of a supplier for the single Essex portal
- The launch of the DigiGo all electric minibus service
- Growth in patronage
- Maintenance of access to bus travel despite severe financial constraints

- Agreement of common dates for network changes
- Undertaking 49 smaller scale infrastructure schemes to improve the bus network at an ultra- local level
- Agreement to distinct numbering for bus services within districts
- Publication of the 12 network reviews
- Agreement to offering the Essex Saver and Sunday Saver multi operator all Essex tickets on digital ticketing platforms - such as apps

This information is issued by:
Essex County Council

Contact us:
xxx@essex.gov.uk
xxx

xxx
Essex County Council
County Hall, Chelmsford
Essex, CM1 1QH

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 facebook.com/essexcountycouncil

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