

Agenda – Economy, Infrastructure and Skills

Committee

Meeting Venue:

Committee Room 1 – Senedd

Meeting date: Thursday, 29 June
2017

Meeting time: 09.00

For further information contact:

Gareth Price

Committee Clerk

0300 200 6565

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Private pre-meeting (09.00–09.15)

1 Introductions, apologies, substitutions and declarations of interest

2 Bus service operators – Impacts of congestion on the bus industry in Wales

(09.15–10.00)

(Pages 1 – 29)

John Pockett, Director, Confederation of Passenger Transport Wales (CPT Cymru)

Richard Davies, Operations and Commercial Director Cardiff Bus

Attached Documents:

Research brief

EIs(5)–16–17 (p1) Confederation of Passenger Transport Wales (CPT Cymru)

Break (10.00–10.15)



Cynulliad
Cenedlaethol
Cymru

National
Assembly for
Wales

3 The TAS Partnership Limited – Impacts of congestion on the bus industry in Wales

(10.15–11.00)

(Pages 30 – 33)

Chris Martin, Director of The TAS Partnership, The TAS Partnership Limited

Attached Documents:

EIS(5)–16–17 (p2) The TAS Partnership Limited

4 Local Government – Impacts of congestion on the bus industry in Wales

(11.00–12.00)

(Pages 34 – 42)

Tim Peppin, Director of Regeneration and Sustainable Development, Welsh Local Government Association

Charlie Nelson, Transportation Manager, Rhondda Cynon Taf County Borough Council / Association of Transport Co-ordinators Wales

Adrian Morgan, Strategic Transport Planner, Rhondda Cynon Taf County Borough Council / Association of Transport Co-ordinators Wales

Attached Documents:

EIS(5)–16–17 (p3) Welsh Local Government Association

EIS(5)–16–17 (p4) Association of Transport Co-ordinators Wales

5 Paper(s) to note

5.1 Correspondence from the Chair of the Finance Committee

(Pages 43 – 44)

Attached Documents:

EIS(5)–16–17 (p5) Correspondence from the Chair of the Finance Committee

5.2 Additional information from the Minister for Skills and Science regarding apprenticeships

(Pages 45 – 49)

Attached Documents:

EIS(5)-16-17 (p6) Additional information from the Minister for Skills and Science regarding apprenticeships

6 Motion under Standing Order 17.42 to resolve to exclude the public from the remainder of the meeting

7 Scoping paper – Selling Wales to the World

(12.00-12.15)

(Pages 50 – 52)

Attached Documents:

EIS(5)-16-17 (p7) Scoping paper

8 Forward Work Programme

(12.15-12.30)

(Page 53)

Attached Documents:

EIS(5)-16-17 (p8) Forward Work Programme

Private de-brief (12.30-12.40)

Agenda Item 2

Document is Restricted



Cyddfederasiwn Cludwyr Teithwyr Cymru
Confederation of Passenger Transport Wales

CPT Cymru written submission to the Economy, Infrastructure & Skills Committee inquiry into the effects of congestion on the bus industry in wales

Cyddfederasiwn Cludwyr Teithwyr Cymru/The Confederation of Passenger Transport Wales (CPTCymru) is the professional trade association of the bus, coach and light rail industry in Wales and is part of CPT UK. Its members in Wales include operators forming part of large multinational transport operators, municipally owned operators, medium sized independent operators and small family businesses. CPT Cymru members provide around 85% of all bus journeys and some 70% of all public transport journeys made across Wales. Our members are often significant local employers, especially in the rural parts of Wales, and make major contributions to their local economies. The bus and coach industry as a whole employs XXXX

CPTCymru governance includes the Bus Commission Cymru, Coach Commission Cymru and also its Committee for Wales, which all members may attend, and members are consulted widely on the whole range of issues affecting road based public transport.

We are pleased to be able to contribute this brief submission to this enquiry by the Economy, Infrastructure and Skills Committee of the National Assembly for Wales. We have no objection to this being placed within the public domain.

Until recently, there had been little work undertaken on the effects of congestion on the bus industry, and even now, there is only limited work available, none of which refers specifically to Wales. The Greener Journeys Report on the effects of congestion on the bus industry written by Professor David Begg, and published last year, highlighted the problem admirably. Whilst its findings relate to the UK as a whole, there is neither reason nor evidence to suggest that the situation in Wales is any different to the overall UK position.

Greener Journeys provided a number of surprising facts and statistics:

- Bus journey times in our most congested urban conurbations are growing by 10% per decade;
- A 10% decrease in bus journey speeds reduces patronage by 10%-14%;
- If bus journey times continue to increase by almost 1% per annum, we could lose access to around 5,000 jobs per year as a result;
- Traffic congestion drastically worsens air quality. In nose-to-tail traffic, tailpipe emissions are four times greater than they are in free flow traffic;

- If smart-ticketing and cashless options could be extended to the rest of the UK, bus journey times could be improved by up to 10% by halving dwell time at bus stops;
- Congestion is set to get worse, with traffic growing by up to 55% by 2040;
- Congestion is widely acknowledged to be a serious constraint on growth and estimated to cost at least £11bn per annum in urban areas alone, according to government analysis;
- A survey of businesses by the British Chambers of Commerce put the cost of congestion at £17,350 per business. The same survey found congestion to be a problem for around 90 per cent of businesses, with around 45 per cent viewing it as a significant problem;
- A report by the Centre for Economics and Business Research estimates that British business will lose £300 billion to gridlock by 2030.

A number of operators have supplied examples of serious congestion affecting their services which gives something of a local picture of the issue. These are provided as an appendix to this written submission. From those examples, it can be appreciated that congestion is a major problem in various parts of Wales.

Looking at the broader picture, the bus industry makes a significant contribution to the life and economy of Wales, and therefore, the adverse effects of congestion could have wider effects. It is estimated that, across Wales, around 8,000 people are employed in the bus and coach industry. Bus operators are, therefore, not just providers of public transport services, but also significant employers and make a significant contribution to the economic activity of their localities.

Buses provide the backbone of public transport right across Wales, serving all parts of the country, including those areas not served by other forms of public transport. Passenger numbers clearly demonstrate this - the annual number of bus passengers is over 110 million, whereas the all Wales rail franchise carries less than 30 million passengers. CPT Cymru strongly believes, however, that buses are not given the political importance they deserve, and are treated as the Cinderella of public transport. Priority continues to be given to other modes of public transport, and, regrettably, to the car user – free or reduced town centre car parking charges, is a prime example of this.

Whilst more people commute to work by bus than any other mode of transport and more shoppers travel to our high streets by bus than by any other mode, decision makers do not appear to understand fully the social, economic and, especially important in this the context of this inquiry, environmental importance of buses; this is often reflected in the lack of priority to buses in the decisions they make. This is in terms of both funding and also actual on-road bus priority measures.

We are aware that government at all levels faces a very difficult financial situation, but we are concerned at the apparent lack of appreciation of the impact that cutting funding for buses is having on communities across Wales. The economic case for funding buses, which must include providing effective bus priority measures, is clear and it is a false economy to make short term savings as the longer term consequences can be far reaching. Moreover, as highlighted in the Greener Journeys report, congestion also adversely affects the environmental and sustainable aims of government.

CPT Cymru would be happy to deal with any queries or provide further information that would be helpful for the committee by contacting me in Welsh or English.

JOHN POCKETT

Cyfarwyddwr : Director

CPT Cymru

Mehefin 2017 : June 2017

The main pinch points at peak in Newport are:

1. Brynglas Tunnels, M4 Newport
2. Clarence Place, Newport
3. Old Green Roundabout, Newport
4. Pont Ebbw Roundabout all approaches, Newport
5. Malpas Road full length from Malpas Shops right into City Centre
6. Gwent Hospital on Cardiff Road, Newport
7. Forge Road, Newport
8. Tredegar Park Roundabout at the ONS in Newport.

However it must be said that all the main corridors completely shutdown with traffic congestion if there is an accident on the M4 between Coldra and Tredegar Park exits.

The main pinch points at peak in Neath are:

Winsor Rd Neath
Eastlands Rd Neath
Victoria Gdns Neath
ALL of Neath Abbey
Stockhams Corner

The main pinch points in Cardiff are:

- 1 West Grove / Newport Road (worsened during current road works)
- 2 Station Terrace / Churchill Way (especially weekends)

3 A470 North Road and Manor Road

4 A469 Caerphilly Road (worsened during current road works)

5 Custom House Street / Bute Terrace (John Lewis Junction) / Adam Street and leading to Moira Terrace / Glossop Road / Newport Road

6 Albany Road /City Road /Crwys Road junction

7 Whitchurch (Penlline Road and Merthyr Road)

8 A4119 Cathedral Road & Cardiff Road (Pontcanna to Llandaff)

Another hot-spot was UHW but since the new traffic scheme was introduced in August there does appear to have been a significant improvement in traffic flow through the hospital.

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Areas of delay in the First Cymru Operating Area

Location	Delay of up to	Comments	No of buses affected
Parc Tawe bridges and gyratory Swansea	20 minutes	Always congested but at peak times some serious delays affecting all roads in the area	40 per hour
Oystermouth Road heading towards Fabian Way Swansea	20 minutes	Heavy traffic causing congestion linked to above	40 per hour
Oystermouth Road heading towards Mumbles Swansea	30 minutes depending on weather and traffic volumes	This road is constantly busy. There are pinch points at Sketty Lane and the University entrance. Traffic volume hugely increases in fine weather heading towards Mumbles and the Gower. Several pedestrian crossing in constant use cause	30 per hour

		delays	
High Street Swansea	20 minutes	This is for outbound traffic and inbound which at times (no specific time) can be delayed the whole length of High Street with the lights at the station giving short green lights	31 per hour
Carmarthen Road Fforestfach Swansea	15 minutes	Between Fforestfach Cross and Parc Fforestfach mainly outbound	5 per hour
Gorseinon to Gowerton Swansea	20 minutes at peak times	The traffic queues past the Gowerton by pass heading towards Gowerton from Gorseinon	2 per hour
Cockett lights Swansea	10 to 15 minutes at peak times	This for buses heading in both directions	8 per hour
Ynysforgan Roundabout Swansea	10 to 15 minutes at peak times	This is buses heading in both directions	6 per hour
Liberty Stadium Swansea	Up to 20 minutes at times	Worse on morning and afternoon peaks but can be congested during the day	16 per hour
Peniel Green Road Llansamlet Swansea	Up to 20 minutes at times	Worse on morning and afternoon peaks but can be congested during the day	4 per hour
Penllergaer approach to roundabout from City Centre Swansea	Up to 15 minutes at time	Particularly disruptive on morning and afternoon peak as the roundabout junction is not controlled by lights	6 per hour
Penllergaer both roundabouts when heading towards Swansea Swansea from Pontardulais Swansea	Up to 20 minutes at peak times	Long tailbacks on morning peak	6 per hour

Caersalem Traffic lights Treboeth Swansea	Up to 20 minutes at school times	This has some serious delays in both directions at school peak times and also when DVLA traffic is entering / leaving the site	14 per hour
Cwmbwrla Roundabout Swansea	5 to 10 minutes	This is for buses coming onto the roundabout from Pentregethin Road or from Manselton	12 per hour
Brynhyfryd Square	Up to 20 mins	Long tailbacks particularly on morning runout	11 per hour
Ammanford junction of A483 and A474 traffic lights	Up to 20 minutes	The delays here are mainly on the peaks but can appear at any time of day. This affected buses coming into Ammanford from 2 directions	9 per hour
Carmarthen Town Centre	Up to 15 minutes	No consistency to this but the town often gridlocks	5 per hour
Sydney Rees Way Haverfordwest	Up to 20 minutes	At various times of day causing delays getting to and from the bus station	9 per hour
Merlin's Bridge Haverfordwest	Up to 20 minutes on peak times	This is in all directions	8 per hour
A4076 Pedgeman's Hill	Up to 20 minutes on peak times	Heading towards Haverfordwest	4 per hour
A487 into Aberystwyth	Up to 15 minutes at peak times	This is mainly heading towards Aberystwyth worse on morning peak	1 per hour
Junction 36, M4 Designer Outlet	Up to 15 minutes at peak times	Affects services to Aberkenfig, Bryncethin and Sarn, plus into Bridgend	12-14 per hour
Bridgend Town Centre	5-10 minutes (am & pm peaks)	Affects services into and out of Bridgend along the bypass – Coity Road, Park Street, Tremains and A473	12-14 per hour
Maesteg	5 minutes during peak	Commercial Street, Talbot Street, Neath Road.	6 per hour
1 Port Talbot-		Delays at the junction of Cwmavon	2 per

Brynbryddan		Road and Heilbronn way (Tesco) on morning journeys and afternoon journeys during home from school time.	hour
8 Sandfields-Port Talbot		Delays at the traffic lights on Victoria and Ysguthan Road during morning journeys and afternoon home from school time.	2 per hour
23 Port Talbot-Blaengwynfi.		Delays at the junction of Cwmavon Road and Heilbronn way (Tesco) on morning journey.	1 per hour.
34 Neath-Swansea		Long delays on several parts of the route, Penial Green Road, Llansamlet, Tesco Llansamlet during in to and home from school times, The Morfa shopping centre, Liberty stadium, match days and Swansea city High Street.	2 per hour
36 Neath-Pontardawe		Delays around Neath Abbey during college and school times, both a.m and p.m peaks, heavy traffic in Cwrt Hebert,	2 per hour
58/X58 Coelbren-Swansea.		Delays likely during both peaks mainly Swansea and Neath area, also possible delays at Llandarcy (A465)	1 per hour.
X55 Glynneath-Swansea		Delays likely during both peaks mainly Swansea and Neath area, also possible delays at Llandarcy (A465)	2 per hour
59 Neath-Pontrhydyfen.		Delays during both peaks, mainly at the junction of Cimla Road and Eastland Road traffic lights.	1 per hour.
224 Port Talbot-Swansea		Delays likely during morning peaks at the Briton Ferry roundabout.	1 per hour.
226 Port Talbot-Neath		Delays likely during morning peaks at the Briton Ferry roundabout and	1 per hour.

		Windsor Road	
227 Port Talbot-Neath.		Delays at the traffic lights on Victoria and Ysguthan Road during morning journeys and afternoon home from school time, delays likely to and from school times, Bae Baglan, also possible delays on Windsor Road.	4 per hour
X1 Swansea-Bridgend.		Delays likely during both peaks mainly Swansea, delays also possible at the junction of Park Street Bridgend during morning and afternoon peak times.	1 per hour
X2 Porthcawl-Cardiff.		Delays likely at Park Street, Bridgend during both peaks, traffic in Cardiff in general flows well but is vulnerable during big events.	3 per hour.

Stagecoach in South Wales

Congestion Hotspots / Priority Zones

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Priority	Location	LA area	Issue	Depot affected	Services affected	Suggested solution	Comments
	Old Green Roundabout, Newport	Newport	Congestion	Cwmbran/Blackwood	ALL	Bus priority onto roundabout from Mkt Sq Bus Stn	Make better use of signalling? Traffic light phasing recently changed & traffic backs up along Westgate St
	Westgate Street (top)	Cardiff	Congestion	Porth	132	Re-phase traffic lights at Westgate St / Cathedral Road	
	Caerphilly Road, Cardiff (Birchgrove Jct)	Cardiff	Congestion	Caerphilly	A/B	Re-phase traffic light sequence.	
	Cathays Terrace/Whitchurch Rd, Cardiff	Cardiff	Congestion	Caerphilly	A/B	Re-phase traffic lights to allow cross flow from UHW.	
	A4054 Merthyr Road, Tongwynlais	Cardiff	Congestion	Porth	132	Improve & enforce parking restrictions	
	A4058 Hopkinstown Sunnybank Road, Griffithstown	RCT	Parking	Porth	120 / 130 / 132	Enforcement of parking restrictions	Parking nr post office PM
	Ash Crescent, Gurnos Est, Merthyr	Torfaen	Congestion	Cwmbran	X24	Parking restrictions & enforcement	
	Merthyr	Merthyr CBC	Parking	Merthyr	27	Parking restrictions & enforcement	Indiscriminate on-street parking
	Bedlinog	RCT	Parking	Merthyr	79	Parking restrictions & enforcement	Indiscriminate on-street parking Parking during school times
	Haydn Terrace, Merthyr	Merthyr CBC	Parking	Merthyr	33	Parking restrictions & enforcement	
	Aberfan	Merthyr CBC	Parking	Merthyr	81/82	Parking restrictions & enforcement	Heavy on street parking
	Troedyrhiw	Merthyr CBC	Parking	Merthyr	78/79	Parking restrictions & enforcement	Heavy on street parking
	Ferndale	RCT	Parking	Aberdare	172	Parking restrictions & enforcement	Heavy on street parking
	Cwmaman	RCT	Parking	Aberdare	7/8/9	Parking restrictions & enforcement	Heavy on street parking
	Garden City, Gilfach Goch	RCT	Parking	Aberdare	172	Parking restrictions & enforcement	Heavy on street parking
	Llanbradach, Caerphilly	Caerphilly	Parking	Blackwood	26/50/C9	Traffic regulation enforcement	
	Gladstone Street, Abertillery	Gwent	Parking	Blackwood	X15, E3	Traffic regulation enforcement	
	Cwmcarn village	Caerphilly	Parking	Blackwood	151	Traffic regulation enforcement	
	Station Terrace, Caerphilly (Bus Station Exit)	Caerphilly	Parking	Blackwood	All Services	Traffic regulation enforcement	Indiscriminate taxi parking
	Abertridwr, Senghenydd,	Caerphilly	Parking	Caerphilly	B	Increased parking restrictions and	

Caerphilly
Cwm, Ebbw Vale

Blaenau
Gwent

Parking

Blackwood

X18, E3

enforcement
Increased parking restrictions and
enforcement

Agenda Item 3

Impacts of Congestion on the Bus Industry in Wales

Chris Martin BSc FCILT PIEMA, The TAS Partnership Limited – June 2017

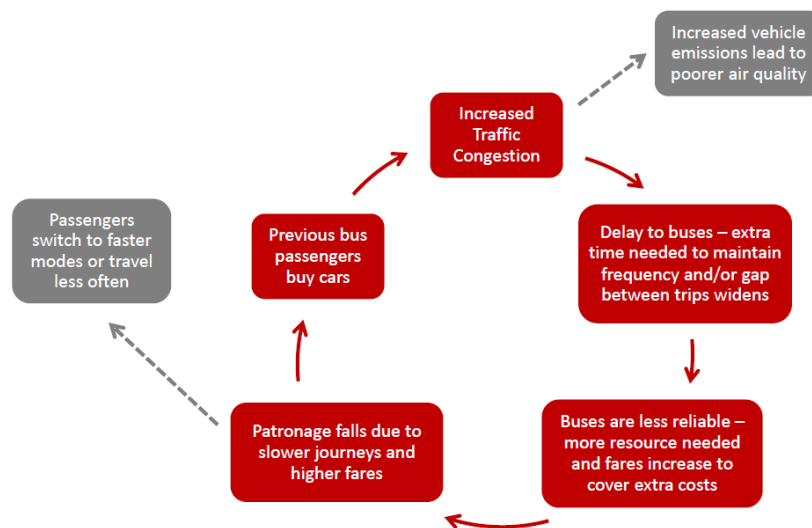
About Us

1. The TAS Partnership Limited ('TAS') is a specialist passenger transport consultancy that has provided qualified, independent advice, research and insight to and on behalf of the UK public transport industry for over 25 years. Our clients have included Welsh central and local government, transport operators and other stakeholders who share our interests in a safe, reliable, efficient and sustainable public transport sector in Wales and the UK.

The Impacts of Congestion on the Welsh Bus Industry

2. Our consultancy work has often led us to analyse and evaluate the impact of congestion on bus services – and how, if left unchecked, it creates a pernicious 'cycle of decline' in the sector (Fig. 1).

Figure 1: The Pernicious 'Cycle of Decline'



3. Congestion has the following impacts on the bus industry:
 - (a) Demand for road space exceeding supply – this, in turn,
 - (b) Poor productivity;
 - (c) Increased operating costs and customer fares;
 - (d) Making local bus services uncompetitive and unattractive to users.
4. Our paper summarises the key features of each impact, offering our own views and perspective on how to address the impact of congestion and local bus services in urban environments.

Demand and Supply

5. Fundamentally, congestion forms part of a classic cause-and-effect relationship – where demand (road traffic) exceeds supply (road capacity), resulting in the 'effect' of congestion. Table 1 summarises actual road demand in Wales from 1996 to 2016, based on latest statistical data. We note that:
 - (a) Total road traffic from all motor vehicles has increased by 5% over the past decade, and 23% over the past 20 years;

- (b) Much of this increase appears to have been driven by growth in cars/taxis and light goods van traffic;
- (c) The bus and coach sector has declined by almost a third over the same period, forming less than 1% of total road traffic in 2016.

Table 1 – Total Road Traffic by Mode in Wales, Billion Vehicle Kilometres¹

Mode	1996	2006	2016	10 Years	20 Years
Cars/Taxis	19.3	22.2	22.9	+3.2%	+18.7%
Light Vans	2.6	3.7	4.6	+24.3%	+76.9%
Goods Vehicles	1.3	1.3	1.1	-15.4%	-15.4%
Motorcycles	0.2	0.2	0.2	0%	0%
Buses/Coaches	0.3	0.3	0.2	-33.3%	-33.3%
Total	23.6	27.6	29.0	+5.1%	+22.9%
Bus/Coach as %	1.3%	1.1%	0.7%		

6. Table 2 summarises demand in terms of the number of licensed vehicles by type over the same period of time. Note that, on average, total licensed vehicles has grown by almost 50% during the past 20 years – though the most significant growth has been in cars/taxis and light goods vans. Buses and HGVs have declined during the past ten years.

Table 2 – Total Number of Licensed Vehicles in Wales, (thousands)²

Mode	1996	2006	2016	10 Years	20 Years
Cars/Taxis	1,067.3	1,400.0	1,527.1	+9.1%	+43.1%
Light Vans	110.3	157.0	199.1	+26.8%	+80.6%
Goods Vehicles	18.8	22.5	21.6	-3.7%	+15.2%
Motorcycles	27.0	52.2	57.4	+10.1%	+112.4%
Buses/Coaches	8.5	10.6	9.2	-13.4%	+8.4%
Total	1,231.9	1,642.2	1,814.4	+10.5%	+47.3%
Bus/Coach as %	0.7%	0.6%	0.5%		

7. Further research is required on the causal factors for this increase in demand to ascertain whether there is more at play than simply an increase in vehicles, including:
- (a) The impact of new housing developments on existing road infrastructure;
- (b) The growth in home deliveries;
- (c) The impact and proliferation of ‘network disruptor’ events, including roadworks and accidents.

Productivity

8. The link between transport efficiency and economic growth has long been understood, highlighted as recently by Sir Rod Eddington in the UK Government-commissioned study in 2005. His report suggested that one solution to reduced economic inefficiency was through a reduction in ‘wasted’ time – cutting traffic congestion and reducing unproductive travel time, and encouraging people to use the most efficient and effective means of transport for their journey.

¹ Adapted from DfT Road Traffic Statistics, Table TRA0206

² Adapted from DfT Vehicle Licensing Statistics, Table VEH0104

9. The operating efficiency of bus services is dependent on the speed (a function of distance/time) at which vehicles are able to proceed, and the predictability (or otherwise) of any delays that could occur *en route*.
10. Congestion has two negative influences on the bus industry and its passengers:
 - (a) A “Demand-Side” Effect – congestion leads to slower bus journeys and poor reliability, thus making bus journeys less attractive. The result of this is the loss of passengers to other modes – and transfers to car leads to higher traffic volumes, more congestion and further delays; the pernicious “cycle of decline” (Fig. 1); and
 - (b) A “Supply-Side” Effect – congestion and unreliability increase bus industry operating costs. Slower journeys mean extra resource to provide the same timetable to customers; whilst unpredictable delays create longer journey times in order for operators to demonstrate timetable compliance against reliability required by the Traffic Commissioner.
11. It must not be assumed that serious delays due to congestion are restricted solely to urban areas or locations where routes cross the Strategic Road Network (SRN). It is our experience that congestion often begins outside the town or city, with several examples of services in smaller towns and villages having to be retimed to handle the effects of this congestion.
12. The Welsh bus industry relies on an efficient road transport network in order to undertake its business. A failure by Welsh local transport and highways authorities to exercise their full statutory responsibilities for traffic demand management means that, in our opinion, they are inadvertently participating in the economic degeneration of the Welsh bus industry through their passivity towards the effects of congestion on the sector.

Costs and Fares

13. Congestion has three profound effects on the industry’s operating cost structure:
 - (a) Labour costs – account for almost 60% of the industry’s operating costs; congestion accentuates these costs as it increases journey times, requires more driver resources and adversely affects labour efficiency;
 - (b) Asset utilisation – the ability to use resources wisely and efficiently; this is primarily a function of the speed at which buses can move and the predictability of the timetable (the ‘supply side’ effect’);
 - (c) Fuel costs and consumption efficiency – the growth in traffic congestion means that buses consume more fuel as they need to stop and start more often; this can exacerbate vehicle emissions and contribute to poor air quality on key corridors.
14. Modelling work undertaken by TAS for the Commission for Integrated Transport (CfIT) and the DfT in 2006 and 2007 found that each 1% change in bus speed affected operating costs by 0.8%. Anecdotal evidence suggests that there has been a significant fall in vehicle speeds over the last decade.

Impact on Modal Shift

15. The importance of time – as well as price and quality – drives customer choice in transport. We have argued that this factor – generalised time – is central to an understanding of the economics of the bus industry and how the market works.

16. The combined effect of unreliability and increased journey times is likely to encourage more bus passengers to transfer to other modes. Unpredictable congestion will cause perceptions of longer journey times: people will plan their journey to take account of the worst case, in order to avoid being late for work or missing a connection.
17. The UK has made virtually no progress on the issue of modal shift during TAS' lifetime – it is still widely accepted that a policy to reduce traffic congestion and air quality emissions can be achieved by moving away from private car journeys – though the two policy areas are not inextricably linked.
18. Generalised time also helps to explain why factors such as parking charges, parking restraints and congestion charging are much more important in achieving modal shift than anything bus operators can do themselves. These tools are often outside the control of bus operators – and hence partnership working involving all stakeholders, rather than a prescriptive approach, is key to developing empathy for each stakeholder's challenges and opportunities created by congestion.

Potential Solutions

19. That the inquiry should consider the following potential measures to reduce the impact of congestion on the Welsh bus industry:
 - (a) Ensuring that all of the bus industry's stakeholders have an appropriate understanding of the economics of the Welsh bus industry – including the influence of time, quality and cost factors on market demand, and the behavioural and competitive influence of the private car;
 - (b) That further regulation of the industry does not necessarily address the fundamental root causes of congestion and their impact on bus services – as demonstrated by the problem of growing congestion on London's bus network;
 - (c) Why the growth in rail patronage is seen to be of greater importance to the economy than local buses, when rail benefits as a result of road congestion;
 - (d) To review the design and efficiency of road space, including how roads are maintained and funded;
 - (e) A need to review car parking policy to 'rebalance' the competitive disadvantage the industry faces in terms of 'hidden' costs of motoring;
 - (f) The roles and responsibilities of the various agencies involved in mitigating the effects of congestion on the Welsh bus sector:
 - a. Government – improving the efficiency of existing road infrastructure and a review of funding streams to reward efficient movers of people and goods;
 - b. The Local Authority – through partnership working, effective and coordinated car parking policy, and effective demand management (through statutory role of the Traffic Management Officer);
 - c. The Planning Authority – understanding travel patterns and creating opportunities for good sustainable and public transport access to new and existing developments;
 - d. Operators – continued investment in high quality bus services through improved vehicle standards, fares and ticketing systems and customer care; and for the freight sector, the form and function of last-mile logistics.

INTRODUCTION

1. The Welsh Local Government Association (WLGA) represents the 22 local authorities in Wales. The three national park authorities and the three fire and rescue authorities are associate members.
2. It seeks to provide representation to local authorities within an emerging policy framework that satisfies priorities of our members and delivers a broad range of services that add value to Welsh Local Government and the communities they serve.
3. WLGA welcomes the opportunity to feed comments into the Economy, Infrastructure and Skills Committee's inquiry into the impact of congestion on the bus industry in Wales. Comments are offered below on each of the issues highlighted for the inquiry.

How does congestion affect the bus sector in Wales and how does this compare to other parts of the UK?

4. According to Bus Users Cymru over 100 million passenger journeys are made by bus each year in Wales and bus travel accounts for around 80% of all public transport journeys. The primary impact of congestion on the bus sector is that journey times for passengers are becoming longer from start to destination. The secondary impacts are:
 - To achieve the same frequency of service, more services are needed and this increases operators' costs
 - There is less certainty over the arrival time of services
 - Longer journey times, higher fares (to cover increased costs) and uncertainty over bus times result in fewer people using buses
 - Reduced patronage reduces operator income which adds to pressures to cut services.
5. Whilst other factors are at play (e.g. cuts in level of public subsidy) the consequences are clear. Welsh Government figures indicate that the number of registered bus services in Wales declined by approximately 46%, from 1,943 services to 1,058 between March 2005 and March 2015. The number of bus passenger journeys declined by 19% between 2008 and 2015 and a further million journeys were lost in the year ending March 2016.
6. In contrast, rail passenger numbers have been increasing. Welsh Government statistics show that there were 30.31 million rail passenger journeys which either started or ended

in Wales in 2015-16, an increase of 3.36 per cent compared to the previous year. Over two-thirds (68 per cent) of these journeys were within Wales. Increasing levels of travel by rail can help to reduce congestion on the roads. However, it is important to note that the total number of rail passengers is less than a third of the number of bus passengers. Buses remain a significant source of transport for a large proportion of the population. They also meet the needs many more isolated (especially rural) communities that any expansion of the rail network is unlikely to address.

7. These issues are not dissimilar to many other parts of the UK, although the geographic configuration of some areas (e.g. with Valleys feeding into coastal urban areas) is an important, albeit not unique, factor.
8. To ensure the regions of Wales can function effectively and efficiently it is important that congestion is tackled. This needs to be done in an integrated way that looks across all transport modes to identify the best solutions.
9. Local authorities are at the forefront of taking forward regional economic development initiatives (City Deals in South West and South East Wales, Growth Deal in the North and Growing Mid Wales). Improved transportation is a key component of these initiatives. Without the planned improvements to all modes of transport including bus then the economic benefits will not be fully realised.
10. The Cardiff Capital Region City Deal is underpinned by the South-East Metro project. This is a combination of improved bus and rail services across the region. Specifically, for bus services this involves improvement both to the vehicles and to the highway infrastructure. For example, where feasible, the introduction of priority/dedicated lanes for buses may encourage car drivers consistently stuck in congestion to consider switching their mode of travel.
11. An improved bus sector will assist with the movement of people around the four regions whether for business or leisure purposes. However, bus travel will not be considered an attractive alternative to the private car so long as congestion impacts on punctuality and the individual's ability to get to their destination on time or to catch a connecting service.

How should policy be improved to address the impact of congestion on the bus sector?

12. Buses on the highway network should encounter minimum congestion to allow journey times to meet the timetable.
13. There are already several policy levers available to the Welsh Government and local government which could assist with reducing congestion. However, in many cases this would require considerable investment in the highway infrastructure over a sustained period. In the short term, undertaking works on the highway network could impact negatively and create more congestion requiring close liaison with bus operators to manage any disruption.
14. Another important consideration relates to the need to achieve decarbonisation in the transport sector. Both the Climate Change Act 2008 and the Environment (Wales) Act 2016 commit to an 80% reduction in emissions by 2050 against a 1990 baseline. The latter Act, specifically for Wales, introduces a series of carbon budgets. Since transport accounts for around a quarter of greenhouse gas emissions, it is inescapable that some measures will be needed that focus specifically on transport. More attention needs to be given to the transport sector in this respect (contrast, for example, the efforts being made to reduce emissions associated with waste and property).
15. Congestion, which results in idling engines, is known to create additional, higher levels of emissions (with associated health issues). Buses use less fuel per person carried and hence can produce less pollution than the number of cars they replace. Therefore, it would seem clear that policies to encourage greater use of buses should be included as part of any package of measures to address decarbonisation targets. Reducing congestion will assist in the operation of bus services and keep costs down. Better, more reliable services should lead to an increase in patronage and therefore income. Clearly, there are mutual benefits to be realised. Policies to reduce congestion, therefore, will need to look at ways of giving priority to, and encouraging greater use of, buses (as well as other public transport and active travel). Switching car users onto buses and reducing vehicle idling times will have a beneficial impact on air quality.

Whether congestion has an impact on the need for public subsidy of bus services in Wales?

16. This will require public funding to redesign parts of the highway network to allocate dedicated bus lanes and increased funding to encourage non-car travel including active travel.
17. It is important though too, and in line with the Well-being of Future Generations Act, to take a whole-systems view of any 'subsidy' of the bus service. Whilst some bus services are run on a commercial basis, all well-planned services (especially subsidised ones) can be linked to 'public goods'. They generate a range of benefits (without profit) to all members of society. These 'goods' include reductions in congestion with benefits for local businesses and economies, reductions in emissions and associated improvements in air quality, improved labour market linkage between places of supply and demand, improved possibilities for social interaction (especially for older people and those on low income without cars), access to health services (helping to prevent cases from becoming acute and more expensive to treat) and can help to keep communities 'alive', especially in rural (and often Welsh language) heartlands. Such benefits are hard to 'cost' but should be taken into consideration in any assessment of the need for public subsidy of bus services.

For further information please contact:

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ATCO Cymru welcomes the opportunity to submit written evidence to the National Assembly for Wales' Economy, Infrastructure and Skills Committee in connection with the above consultation.

How does congestion affect the bus sector in Wales and how does this compare to other parts of the UK?

In response to this question, it is appropriate to refer to the findings of a study published in 2016 by the Greener Journeys organisation entitled "The impact of congestion on bus passengers". This study undertook research into the impact of rising traffic congestion on the bus sector over several decades and was able to demonstrate the link between traffic congestion, rising operating costs for bus companies, fare levels and declining passenger usage.

Using evidence gathered from across Great Britain, the study found that for urban bus services there has been an increase in end-to-end journey times of between 0.5% and 1.5% per annum over the past 30 years. The primary cause of this increase being worsening traffic congestion along key arteries, which itself is caused by a number of factors such as the growth in delivery vans related to the proliferation of online shopping, increasing car ownership, uncoordinated roadworks and the growth in private hire vehicles associated with smartphone apps such as Uber.

This trend has translated into falling bus speeds with the study showing a direct correlation between bus speeds and patronage. Namely, it concludes that a 10% decrease in bus speeds reduces bus service patronage by at least 10% which, with longer end-to-end journey times, can also lead to an 8% increase in a bus operator's costs in order to maintain a service at existing frequencies which require using extra resources. These higher operating costs are often met by the passenger through the increased fares box or in terms of reducing service frequencies as the operator seeks to contain costs.

The Greener Journeys study states that congestion has been "corrosive to the bus sector" in which it has been caught in the "vortex" of three vicious downward spirals:

- Slower speeds leading to higher costs, higher fares, fewer passengers, service decline, fewer passengers.
- Slower speeds leading to increased end-to-end journey time, fewer passengers, service decline, fewer passengers.
- Slower speeds, punctuality and reliability decline, fewer passengers, service decline, fewer passengers.

In Wales, the situation is no different. A recent report identifying the South East Wales Regional Bus Infrastructure and Corridor Investment Strategy compared the peak and off-peak journey times of a number of services between valley communities and Cardiff over a 5 year period. This report found that, in a number of instances, journey times had increased, with the bus operators experiencing similar difficulties and challenges caused by traffic congestion as are being felt in other parts of Great Britain. Similarly, over the same period, a significant proportion of the strategic services in North Wales have not only suffered from worsening peak periods, but the main operator has

tended to increase the number of vehicles and drivers required to run them or made modifications to specific routes in order to try to counter the effects of lengthening journey times. Both solutions are at the detriment of passengers and ridership.

How should policy be improved to address the impact of congestion on the bus sector?

In surveys undertaken by organisations such as Transport Focus and Bus Users Cymru, a punctual and reliable bus service is regularly highlighted by passengers as a 'priority for improvement'. The ability of bus operators to provide such a punctual and reliable bus service can also often affect the overall 'passenger satisfaction' rating given to a bus operator in these surveys (eg. Transport Focus Bus Passenger Survey Autumn 2016).

Under the right conditions and circumstances, local bus services are efficient 'people movers', with buses taking up significantly less road space, using less energy and emitting less pollution per mile than the motor car. A package of measures which can make better use of the limited highway space will create the conditions in which improved bus speeds and more reliable bus services can be delivered and enable the bus operators to offer a more sustainable, viable and attractive alternative to the motor car for journeys in urban areas. However, ATCO Cymru recognises that reallocating road space away from the motor car can be controversial and difficult to implement in certain areas.

In terms of improving policies to address the impact of congestion on the bus sector, ATCO Cymru argues that the focus should not just be on physical infrastructure measures along the highway. At a national level, tax and fiscal matters such as fuel duty can influence car ownership and use. At a regional and local level, Spatial Plans and Local Development Plans can ensure that new developments and facilities do not generate extra traffic by locating them along existing public transport routes.

As the local highway and planning authority, councils in Wales already have the legislative powers and mechanisms in place to implement various infrastructure measures that can influence traffic volumes and benefit bus services. These can be backed up through civil enforcement and new technology such as urban traffic control systems and CCTV monitoring.

Notwithstanding this, ATCO Cymru believes that these measures can only be effective in encouraging car users to switch modes if, at the same time, there are policies in place and a commitment on the part of the bus operator(s) to invest in raising service quality standards and reducing dwell times at bus stops.

In South East Wales, the ground-breaking Bus Quality Standards Scheme links the payment of enhanced kilometre support to the raising of quality standards by the bus operator. However, the freezing of Bus Services Support Grant funding meant that operators were being paid more in 2013 / 2014 for providing less fewer quality aspects when compared with those that are being provided by the bus operators who qualify for the highest level of pay enhancement at the present time.

Furthermore, ATCO Cymru also believes that, in parallel with these measures, quality improvements and demand management measures such as congestion charging, workplace parking levies, raising car parking charges and reducing car parking capacity in town and city centres need to be introduced. In other words, adopting a "carrot and stick" approach in order to reduce the impact of traffic congestion on the bus sector.

However, it is acknowledged that it is important to find the balance so that these combination of measures do not adversely impact on the vibrancy of town and city centres which need to remain in the light of the growth of online shopping and continuing popularity of out-of-town retail parks.

Every urban area has its own specific characteristics and a package of measures implemented in one urban area may not be effective in a neighbouring area. For example, the physical constraints and topography of a South East Wales Valley, as elsewhere, may restrict the ability of local authorities to provide priority for bus services along the highway and the only effective solution towards overcoming congestion is to improve the flow of traffic in general.

This measured approach indirectly benefits the operation of local bus services as does the Environment Act 1995 which places a statutory duty on local authorities to monitor air quality in their area and draw-up Air Quality Action Plans for communities where certain pollutants exceed the national guidelines. In most cases, the main source of these pollutants is vehicle emissions. Buses are often seen as the culprits but increasingly the newest ones meet Euro V and Euro VI standards and are far less in number than light goods vehicles that dominate the street scene. In addition, the emissions from HGV refrigeration units or auxilliary heaters must not be overlooked.

In other areas of Great Britain, a Green Bus Fund has previously enabled bus operators to bid for money to help them purchase new, low carbon emission buses which, as a consequence, has helped to accelerate the scrappage of their older, more polluting vehicles.

Taking the above observations into account, ATCO Cymru considers that it is difficult to identify where any further changes can be made to the existing policies covering Tax and Fiscal matters, Planning and Land Use, the Environment and Highways and Traffic Management that can address the impact of congestion on the bus sector. It is fundamentally a case of how the current policies and legislative powers available to both Central and Local Government are applied on a national, regional and local basis.

However, the effective implementation of these policies requires the commitment of a significant amount of resources, especially capital funding for highway infrastructure schemes. ATCO Cymru believes that under the WelTAG methodology, a strong business case can be developed for many bus priority schemes which can justify this level of funding. Through a Quality Partnership Agreement, there is an opportunity to lever in private sector capital investment in vehicle and service quality enhancements which can maximise the benefits of the funding that is committed by local authorities and the Welsh Government in terms of bus priority and other highways infrastructure.

It is also the case that effective implementation of these policies requires strong political will. For example, local politicians are more likely to receive more objections to a reduction in on-street parking or highway capacity than support for it and therefore need to be prepared to be resolute in promoting public transport policies to relieve congestion. Introducing a statutory requirement may remove the element of political risk, assuming that the statutory requirement is not equally contentious to introduce in the first place.

However, it could be argued that both political and public support will be easier to achieve if the highway measures (such as bus priority) form part of an overall 'package' of public transport service improvements such as earlier and later buses, frequency enhancements, the introduction of new, higher quality, low emission buses etc.

Whether congestion has an impact on the need for public subsidy of bus services in Wales?

In a recent information release, the Confederation of Passenger Transport (Welsh Region) stated that the staff costs of its members have increased by over 18% above inflation over the last 10 years, mainly as a consequence of "the need for more staff to keep services going in the face of rising traffic congestion". This figure illustrates the impact of congestion on the finances of the local bus operators in Wales.

If the average speed of bus services in urban areas continues to decline, as examined in the Greener Journeys report, then ATCO Cymru believes that there may be a need for increasing public subsidy. This would be in order to maintain those local bus services which are marginally commercially viable at the present time but would become uneconomic to operate due to a combination of rising operating costs and declining passenger usage.

However, as revenue funding is most likely to decline further, either directly or through no inflationary increase, ATCO Cymru would advocate more capital funding to offset the revenue reduction in order to implement more priority measures. If an operator can save resources and increase patronage through more attractive journey times, then there is potential to halt the passenger decline and reduce the requirement for revenue support, enabling some of the new growth in revenue to be diverted into sustaining the less profitable, marginal routes. The net result of such an approach being to increase viability and reduce the overall need to subsidise services.

Conversely, if the trend in average bus speeds in urban areas is reversed, through the implementation of a package of measures discussed earlier, then ATCO Cymru believes that the "vortex" of the three downward spirals affecting the operation of local bus services, and highlighted earlier in the Greener Journeys report, will not occur.

The need for public subsidy to mitigate the impact of congestion on local bus services in Wales should only arise in order to fund the implementation of these congestion busting measures which, in turn, will reverse the downward spiral into a virtual circle of improvement. Bus operators will be able to generate more revenue from passenger growth which, in turn, will provide the funds for further investment in service improvements and quality enhancements.

Adrian Morgan
Strategic Transport Planner
Rhondda Cynon Taf CBC

Cynulliad Cenedlaethol Cymru
Y Pwyllgor Cyllid

National Assembly for Wales
Finance Committee

Economy, Infrastructure and Skills Committee

15 June 2017

Dear Chair

Scrutiny of the draft Budget

I am writing following the Business Committee's consideration of their draft report on changes to Standing Orders in relation to scrutiny of the draft Budget, prior to the Standing Order changes and the Budget Process Protocol being considered in Plenary next week.

The changes to the Budget process are the culmination of a piece of work started by the Finance Committee in the Fourth Assembly; the devolution of fiscal powers in the Wales Act 2014 have meant that the Assembly's scrutiny now has to consider not just Welsh Government spending plans, but how these plans will be financed, through taxation and borrowing.

The main changes which are being proposed are that the budget scrutiny becomes a two stage process, whereby the higher level information which would be scrutinised by the Finance Committee is published prior to the detail needed by the policy committees, and more time is allowed for scrutiny. Specifically, it is hoped this additional time will allow the policy committees to undertake more detailed scrutiny of the spending in your portfolios, and you will no longer be required to report to the Finance Committee, you are able to report in your own right should you so wish.



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I have requested a discussion on these changes at the next Chairs' forum, to enable us to talk through the changes in more detail and we can consider how:

- the Committee scrutiny will work in practice,
- the Finance Committee can maintain an oversight role,
- we can work together to maximise public engagement,
- any training and development needs for committees can be met

Prior to consideration in Plenary the [proposed changes to Standing Orders have been tabled](#), as has the [revised protocol](#).

Should you have any queries on this please do not hesitate to let me know, and I look forward to discussing these changes further at the Chairs' Forum meeting on 12 July 2017.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Simon Thomas'.

Simon Thomas AM

Chair of the Finance Committee



Julie James AC/AM
Y Gweinidog Sgiliau a Gwyddoniaeth
Minister for Skills and Science

Agenda Item 5.2


Llywodraeth Cymru
Welsh Government

Ein cyf/Our ref: MA-P/JJ/1514/17

Russell George AM
Economy, Infrastructure and Skills Committee (Chair)

21 June 2017

Dear Russell

Thank you for your request e-mail 12 June for where you asked for clarification on a number of matters regarding the Committee's Inquiry into Apprenticeships in Wales. The annex to this letter sets out my response.

I hope this information is helpful.

Yours sincerely



Julie James AC/AM
Y Gweinidog Sgiliau a Gwyddoniaeth
Minister for Skills and Science

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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.

Annex

Query 1

You were very assured that there would be enough money to support your ambitions for Apprenticeships in Wales. However, we note that the budget has not changed substantially in recent years. Can you assure the committee that there will be sufficient funding to support additional apprenticeships above the 100,000 minimum pledge, if the levy and your marketing campaign creates additional demand?

Response:

Our approach is focused on high quality apprenticeships not quantity. During this Assembly term we have committed to delivering a minimum of 100,000 quality apprenticeships – it is one of our key priorities.

In order to deliver against our priorities and recognising the impact of the increasing demand in the public and private sectors, we have increased our investment in apprenticeships from £96m to £111m for 2017-18. This additional funding ensures that we are able to meet demand in priority areas resulting from expectation created by the Apprenticeship Levy this year. Budget allocations for 2018-19 are yet to be determined.

Query 2

We would appreciate clarity on whether you expect the move towards higher level apprenticeships will precipitate a rise in the overall costs of the Welsh Government's apprenticeship programme, given the increased length and complexity of higher level apprenticeships.

Response:

We are rebalancing investment to align to the needs of Welsh businesses. Welsh Government is shifting apprenticeship training from high volume low cost sectors, where the skills content is relatively low and where there is limited evidence of skill shortages, into high value sectors. Alongside this drive we intend to improve the effectiveness of work based skills and classroom based activities, for example, building a cohort critical mass through new on-line programmes, coaching in the work place and new planning arrangements. By focusing on a narrower number of key high value areas we will be able to deliver the most cost effective methods of delivery.

To support growth in high value technical apprenticeships, we are reducing entry level apprenticeships for over 20 year olds in non-priority occupations, such as those in retail, business administration and customer service. It is not in the long-term interest of the Welsh economy to deliver entry level apprenticeships that contribute lower returns on investment in skills. They have limited benefits in the labour market; unemployment rates for those with level 2 qualifications are relatively high and wage returns for level 2 qualifications are relatively low. Employers and apprentices will need to commit to programmes where the aim is achieving a full Apprenticeship rather than Foundation Apprenticeship. The programmes will be increasingly integrated so that level 2 is achieved en route to apprenticeship completion at level 3.

Welsh Government investment will increasingly be led by intelligence from the Regional Skills Partnerships. Welsh Government will use this intelligence to direct contracted apprenticeship providers to deliver in priority areas. We are already investing significantly in expanding Higher Apprenticeships; working with the outcome of the Diamond Review we will extend Higher Apprenticeships investment into STEM subjects and technical occupations.

To support growth we have prioritised the review of existing higher apprenticeship frameworks to ensure they are relevant and attractive to employers, for example, we have added Higher National qualifications to frameworks in the engineering sector which employers value. Ensuring that these apprenticeships include qualifications that employers both recognise and value will encourage take-up.

Query 3

We have heard some praise for a pilot for pre-apprenticeships which has been running in Cardiff/South East Wales. What plans are there to extend or roll out this scheme across Wales?

Officials are in the process of scoping the content and costs of expanding the Cardiff Junior Apprenticeship 14-16 year olds model across Wales. Officials have sought expressions of interest from further education colleges and all have responded positively.

Our Apprenticeship plan also outlines scoping and piloting pre-apprenticeship programmes across Wales and we expect to make announcements in the coming months.

Query 4

You mentioned that you expect to see 'significant increases in the number of advisers working in schools and with young people at key transition points' as a result of a rebalancing of the Careers Wales team. Can you provide specific details regarding how you expect more advisors to become available without increasing the overall budget and explain why this was not done sooner?

To achieve the reprioritisation of activities initiated by the 2017-18 remit letter, Careers Wales are changing how they operate with different client groups, enabling them to selectively disinvest in order to reinvest.

Two actions will enable Careers Wales to make more advisers available to work with young people in schools without increasing the overall budget. Firstly, the company is introducing new delivery models and services (as set out in its vision 'Changing Lives'). These have implications for the way staff work and how clients are supported. Introducing new delivery models, as well as reducing fixed costs in areas such as estates, will help the company release the capacity to focus on young people in education.

The second action is the refocussing of priorities. For example, in recent years Careers Wales has been remitted to prioritise work with young people who are NEET. While this work will continue, it is possible to develop more efficient support structures. Strategically, the decision has been taken to deploy more resource on preventative interactions (with young people while they are in school) to support them in making choices and bridging key transition points. This will, in turn, reduce the likelihood that young people will experience periods of disengagement. The company will also be changing how it works with clients in FE colleges, and releasing some capacity from the support available to adult clients by promoting and directing clients to online or telephone based services.

The change in focus and priorities has been instigated by the implementation of the new delivery vision 'Changing Lives'. Ministers, in supporting the vision and setting the remit for Careers Wales for 2017-18, have acknowledged the need for services to change to achieve:

- a stronger focus on young people;
- enhanced services to support other organisations to help young people develop their careers; and
- even greater use of digital technology.

These priorities were identified through consultation which Careers Wales undertook with stakeholders. The impact of budget reductions and the wide remit set for the organisation by Welsh Government has, in recent years, resulted in the resource which the company was able to deploy specifically to support advice and guidance services in schools being squeezed. While supporting specific groups for specific purposes, the view has now been taken that, to secure strategic goals and outcomes, there is a need to refocus on the statutory service – careers guidance to those in education – albeit using a new delivery model. The current remit reflects this shift in priorities and we expect Careers Wales to reflect the priorities set out in the remit letter on how it deploys staff going forward.

Query 5

While you noted the difficulties in evaluating the ongoing effectiveness of your apprenticeships' engagement programme, you stated that you want to ensure that all Key Stage 4 pupils receive the careers advice and guidance that they need. Have you set any firm targets in relation to this? How will you monitor whether or not children receive the advice they need?

Careers Wales will seek to support every young person who needs career information advice and guidance by concentrating more resources in this area and developing exciting new services. The company will continue to provide specialist support for young people with additional learning needs.

Careers Wales are working to clear achievement metrics in respect of the delivery of services.

In the current year the company is seeking to achieve the following:

- All learners in Year 9 will be introduced by teachers or Careers Wales Advisers to ways of accessing support and information from Careers Wales.
- All Year 9 /11 parent events will be supported by Careers Wales.
- All KS4 learners will complete Career Check.
- All Year 11 learners will be on the Careers Adviser caseload until they are settled in their post 16 destination.
- 70% pupils receiving services in KS4 will receive at least 2 personalised digital interactions.
- Percentage increase in personalised digital interactions.
- Percentage increase in skype and telephone guidance by careers advisers.
- All Careers Advisers will achieve Foundation Level in our new Digital Competency Framework.
- A minimum of 6 Campaigns and 20 Webinars.
- 90% transition plans for Year 9 and Year 11.

Careers Wales produces an annual report each year which provides full details of the services delivered. The organisation is held to account for delivery with Ministers receiving quarterly performance review reports.

During 2017-2018 Careers Wales will continue to:

- Offer all learners, by the end of Key Stage 4, access to support from Careers Wales, making full use of all available channels to offer and maintain this support at a time that is appropriate to their needs and where access arrangements can be put in place.
- Undertake an early needs analysis with learners in Key Stage 4 to prioritise and plan an offer with appropriate inputs by employers and the learning provider.

- Continue to provide appropriate intensive support to identified learners with Additional Learning Needs across all Key Stages undertaking our statutory obligations under section 140 of the Learning and Skills Act 2000 and the SEN Code of Practice for Wales.
- Support routine parent evenings and meetings arranged by schools to engage with parents as appropriate.
- Roll out a range of employer led activities and web based events in schools including open access events and targeted events incorporating best practice developed as part of the Opportunity Awareness Programme.

Careers Wales will evaluate the performance of its new and existing services by:

- Evaluating progress made in the new careers adviser 'account executive' function via surveys conducted with the identified school representatives and Careers Wales staff working in education.
- Rolling out performance measures for careers advisers working in schools which will identify:
 - the assessed guidance needs of year 11 clients;
 - the number and proportion of year 11 clients whose guidance needs were met;
 - the range of blended service delivery methods deployed to meet the client's needs; and
 - the number and proportion of clients in post 16 education and training identified as at risk of leaving prematurely who receive support and the blended methods used to deliver services.
- Using findings from user research with parents and learning from best practice in other home countries, develop appropriate resources and engage with parents making best use of all appropriate channels.
- Conducting research on the benefits and impact of its role in transitional planning review for clients with Additional Learning Needs.

Agenda Item 7

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Agenda Item 8

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